# Solgari

Solgari for Microsoft Teams User Guide

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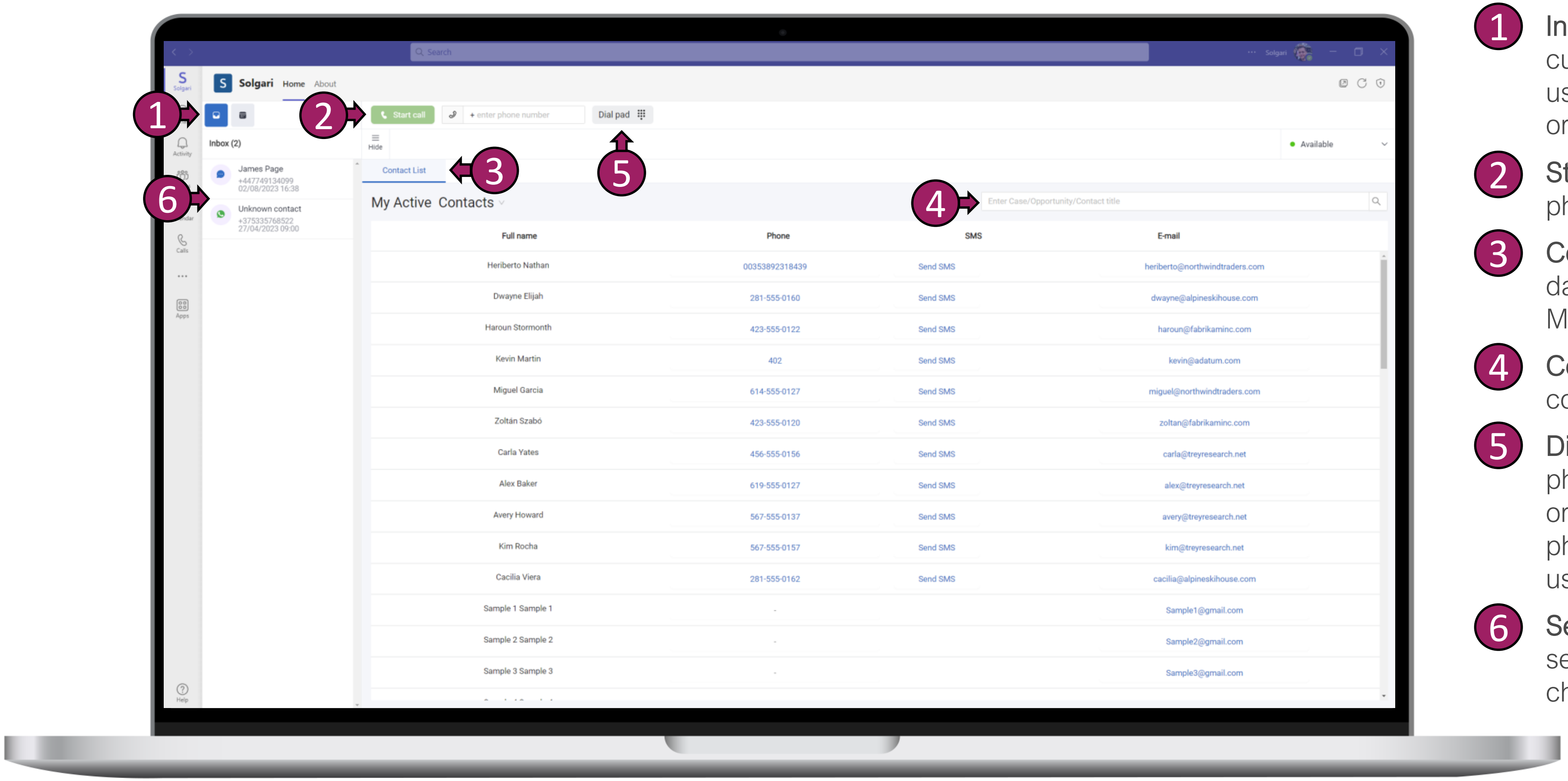
Overview Section

# Overview




1 **Inbox** – Where all communications from customers can be found. Easily respond using voice calls, Facebook, WhatsApp or SMS, Email and more...

2 **Start Call** – Once you have entered a phone number, select Start call

3 **Contacts List** – Access your contact database, including Dynamics 365, Microsoft Exchange or other databases.

4 **Contacts Search** – Search for a specific contact within your contacts list.

5 **Dial Pad** – Select the dial pad to enter a phone number directly, using your mouse or keypad. You can also select the “enter phone number” box and type the number using you keyboard num pad.

6 **Session** – Each customer will join as a session either via a conversational channel or call.

# Overview - Continued

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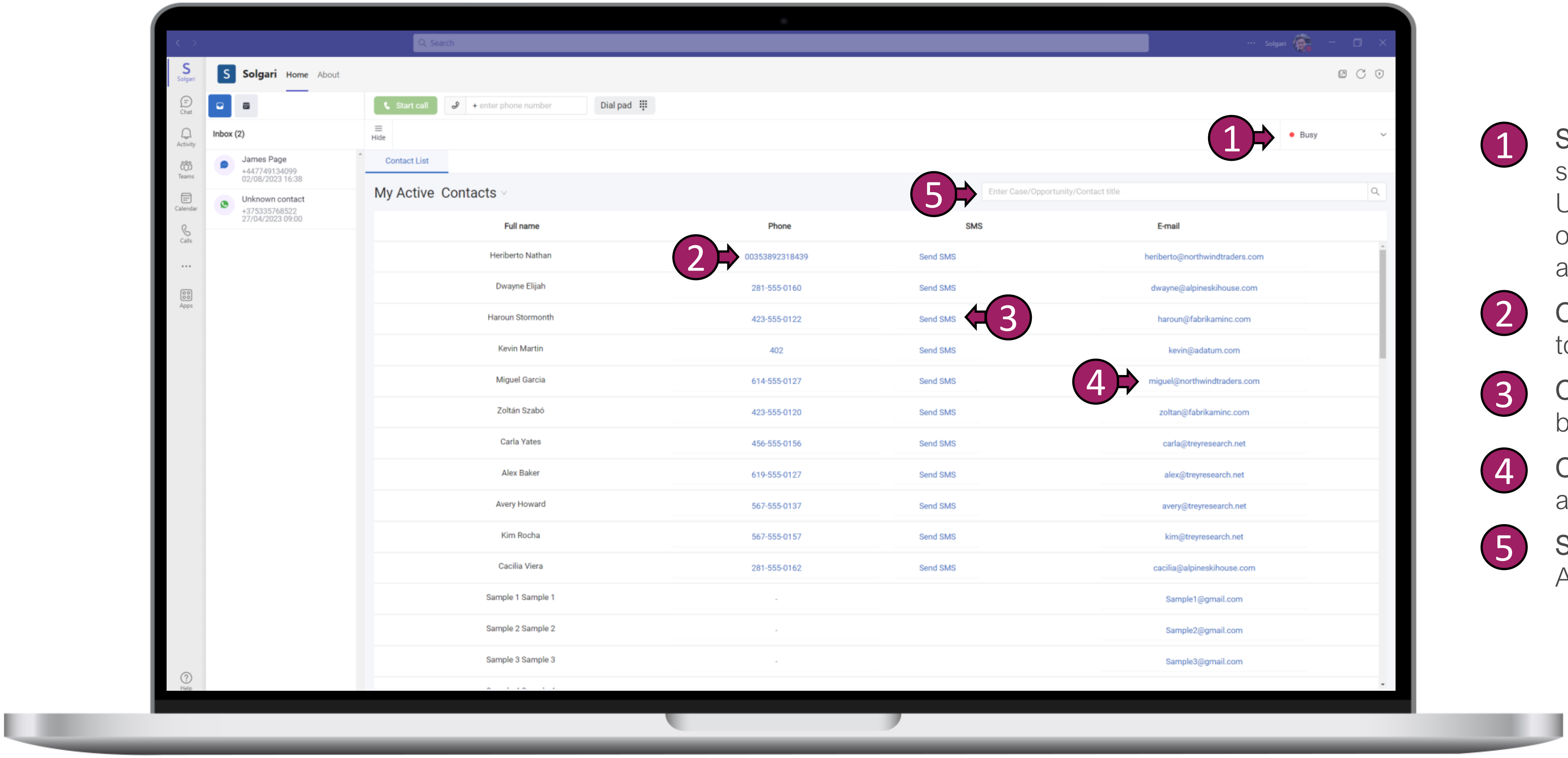


1. **Status -** this is where you select your status, for example, Busy, Available, Unavailable. If you make or receive a call or message, then your presence will automatically be set to Busy or On-a-call.
2. **Click-to-call** – Select the phone number to make an outbound call.
3. **Click-to-SMS** – Click on the Send SMS button to start an outbound SMS.
4. **Click-to-email** – You can click on an email address to start a new outbound email.
5. **Search Contacts** – Search all your Accounts, Contacts and Leads here.

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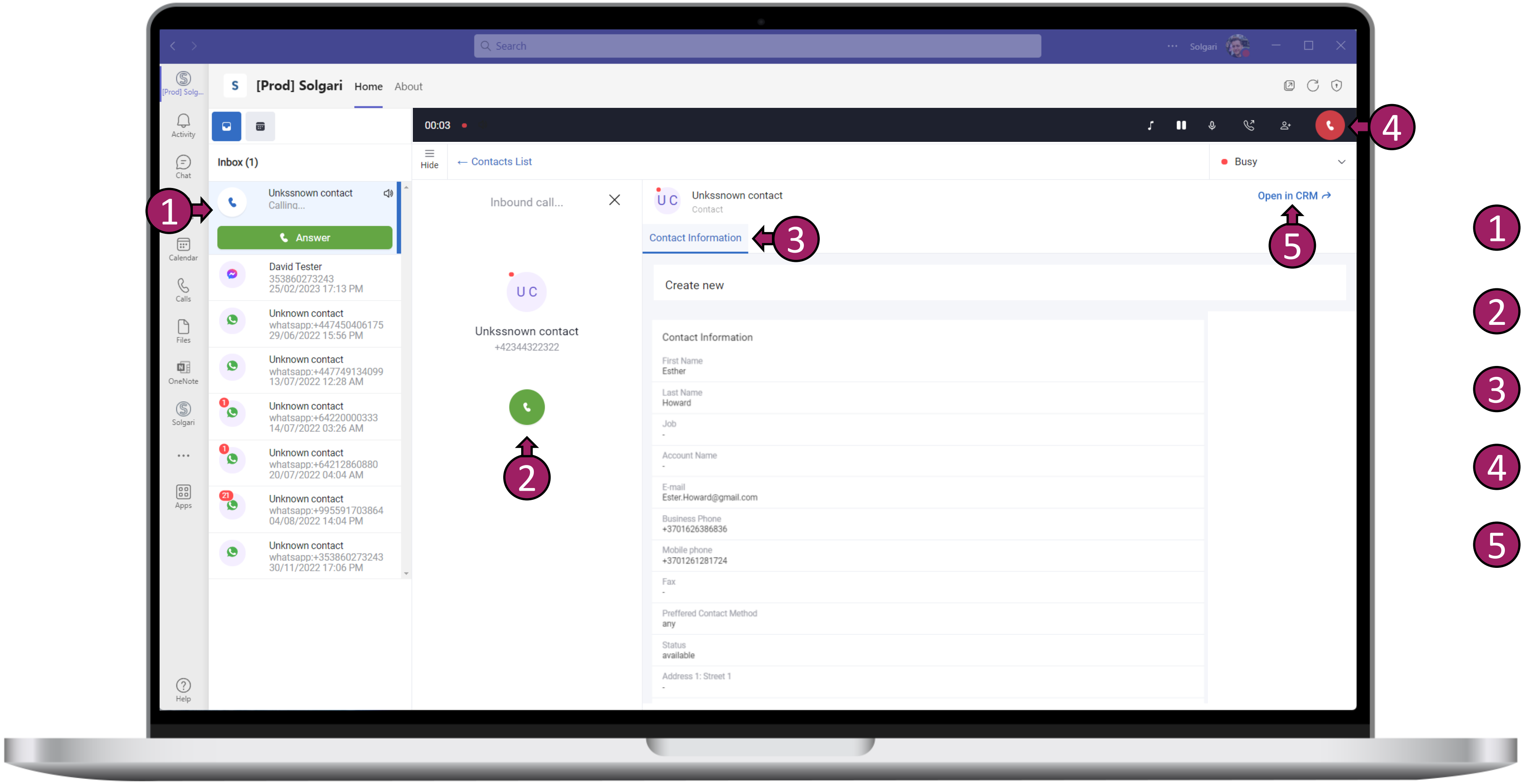
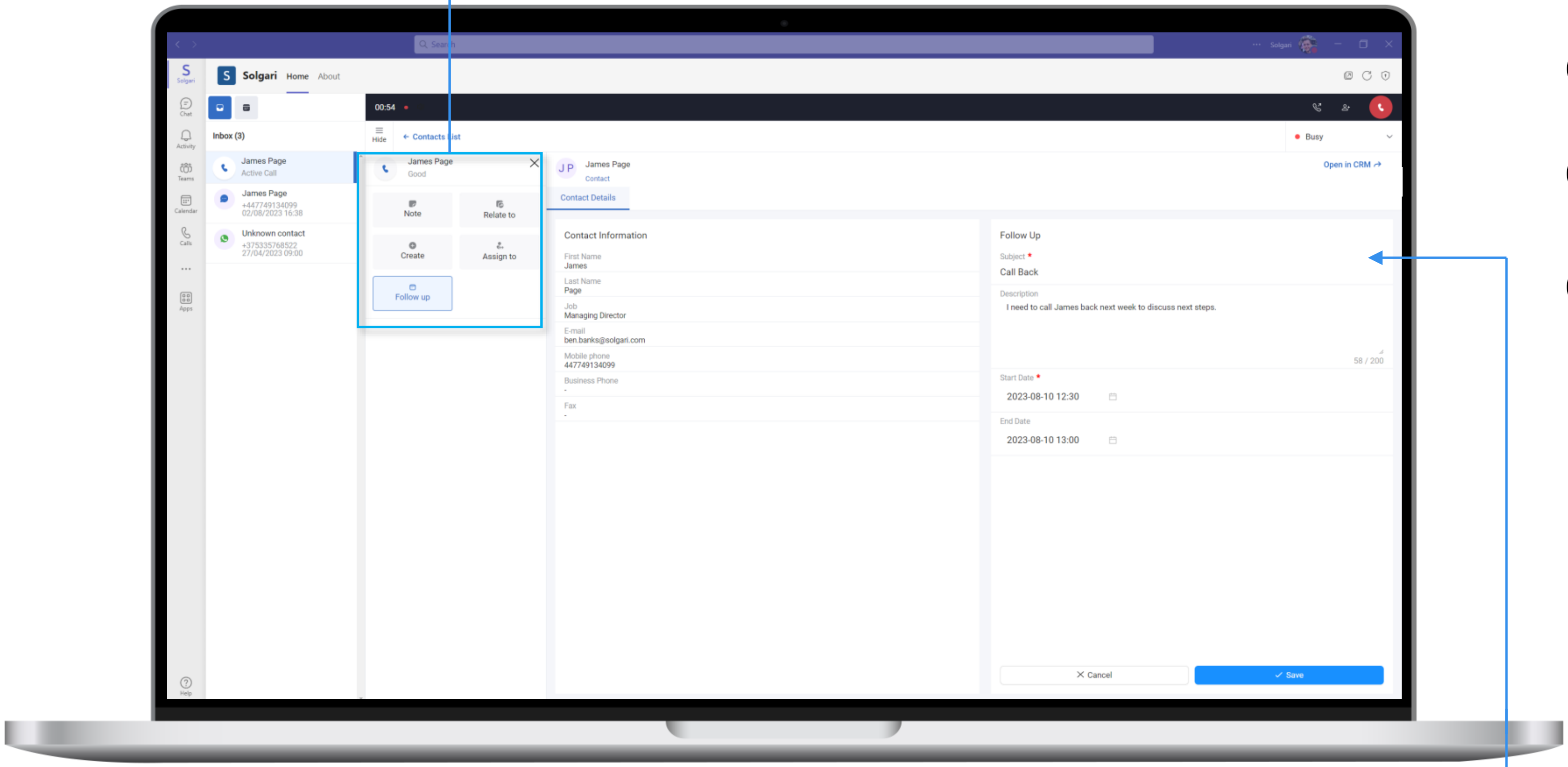
Call Activates Section

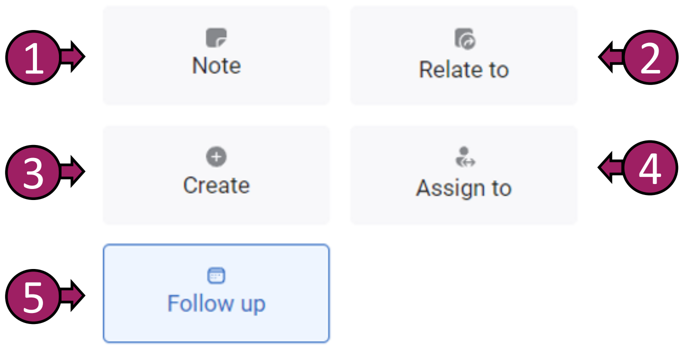
# How to answer a call




1. **Call Session** – you will see any inbound or outbound call session in the inbox.
2. **Answer Call** – Select the green phone icon to answer the call.
3. **Contacts Information** – You will see information about your customer here.
4. **End Call** – Select the red phone icon to end the call.
5. **Open in CRM** – Select this to open the customer record in your CRM.

# Log a phone call activity




1. **Add a note -** Add a note while you're on the call and save it for future reference. Notes will be saved to CRM record timeline.
2. **Relate-To –** Reference your notes and call recording against cases or opportunities in the CRM.
3. **Create –** Create a new Account, Contact or Lead in your CRM from teams.
4. **Assign –** update existing customer data in CRM rather than creating duplicate records.
5. **Follow-up Task** – Schedule a follow-up task and add to you CRM calendar for next steps.

# Call Control

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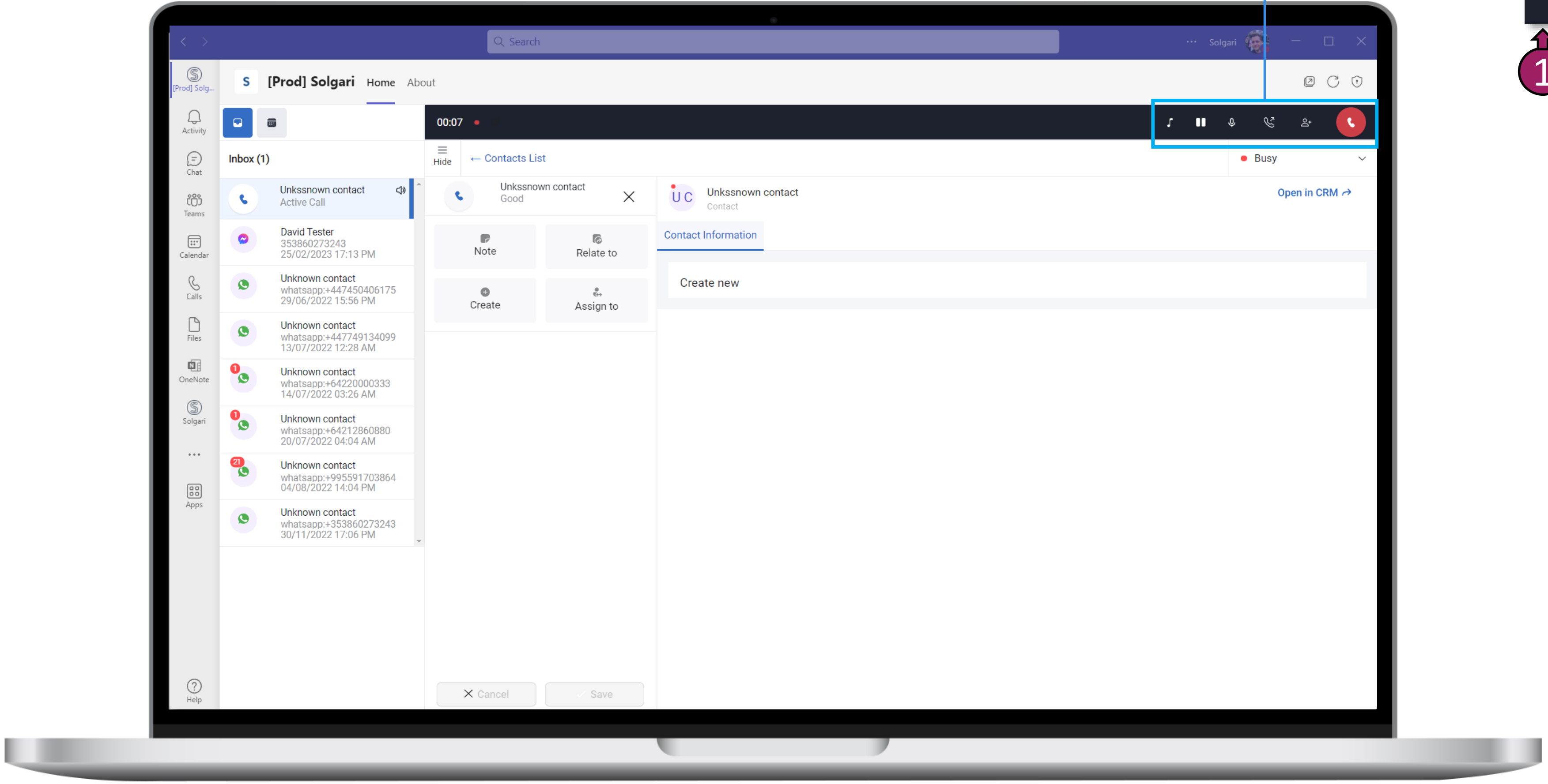
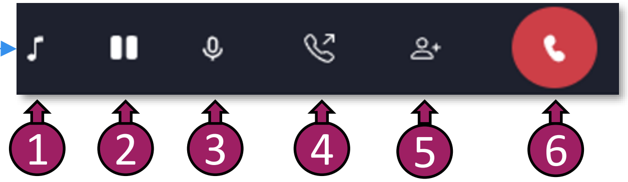
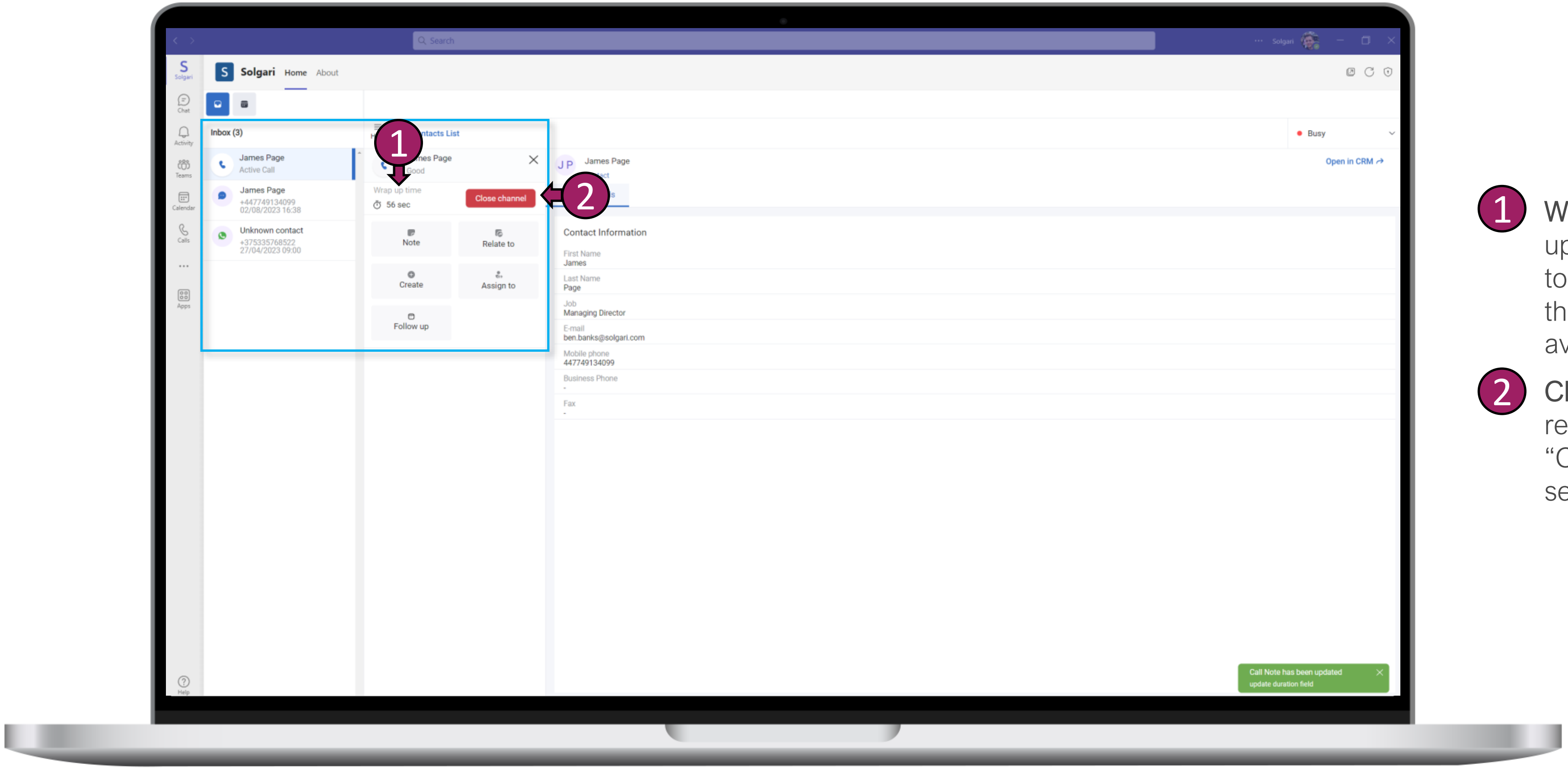



1. **Pause/Resume Call Recording** - Calls are automatically recorded but you can place the recording on pause as not to capture sensitive information with your customer.
2. **On-Hold** – Place your customer on-hold. Remember to press on-hold button again to take them off-hold.
3. **Mute** – Place your mic on mute so that the other party can't hear you. Select the icon again to take yourself off mute.
4. **Transfer** – You can blind transfer (send customer straight to your colleague) or call first (place customer on-hold and announce them to your colleague before completing a transfer.)
5. **Conference** – Select conference to see a list of participants that you would like to add to conference call.
6. **Hang-up** - The red hang up button can be selected to decline the call.

# Wrapping up your call




1. Wrap-up time – Once a call has is hung-up, you will have a small window of time to log any more notes or activities against the call before your presence is set to available.
2. Close Channel – Select close channel to remove it from your inbox. By selecting “Close channel” you will be immediately set to available.

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# Message Activities Section

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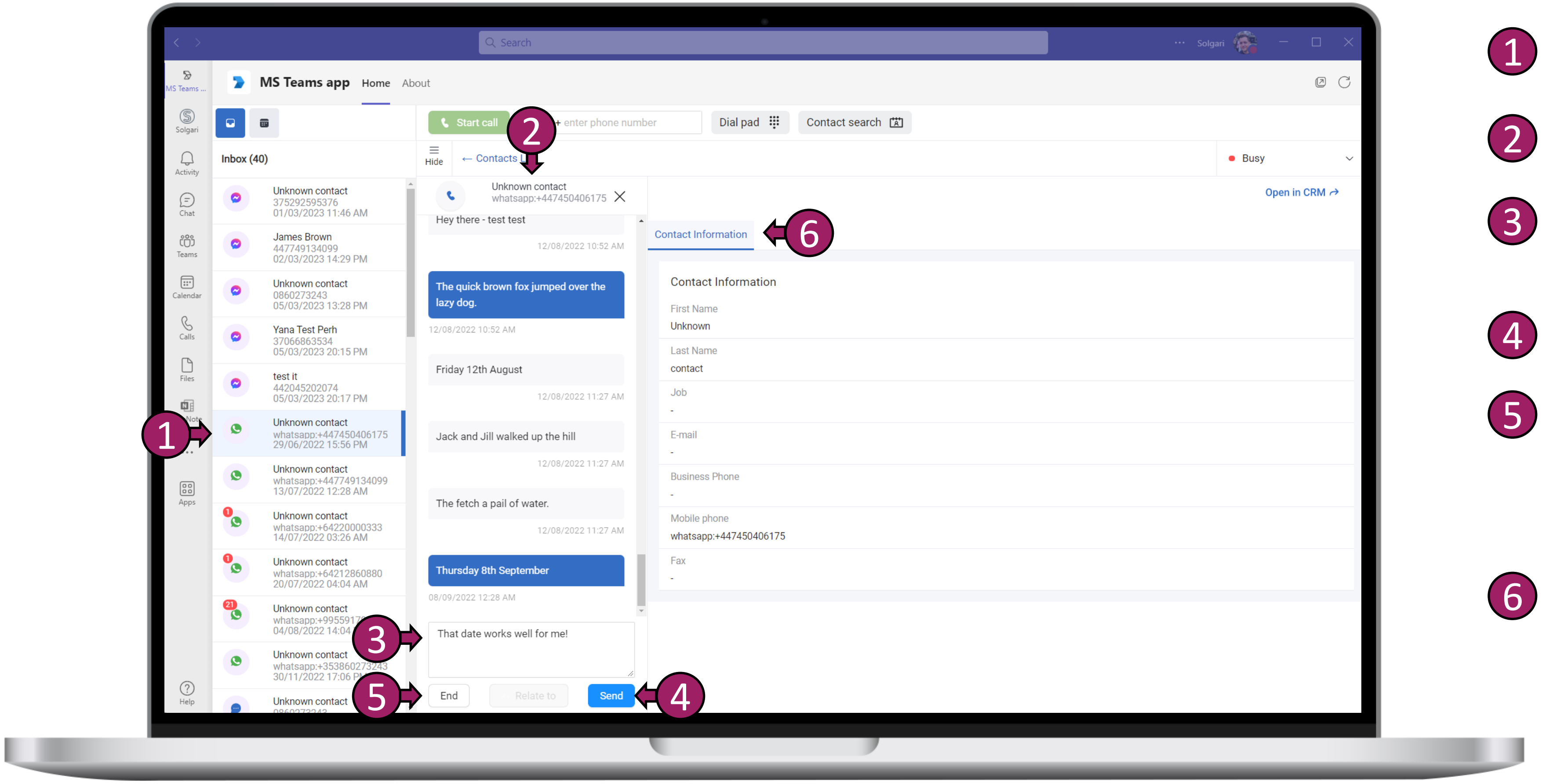
# How to handle a message




1. **Select message -** Select the message in the inbox that you would like to respond to.
2. **Contact name –** Name of the person you are chatting with.
3. **Respond to message –** this is where you respond to a message and can type a message in text.
4. **Send message –** select the send button to send you message.
5. **End conversation** – End conversation button completed your chat conversation with the customer and allows you to wrap-up your notes and clear the channel session from your inbox.
6. **Contact information –** This is the customer information that we have gathered from your database.

# Message Blind Transfer

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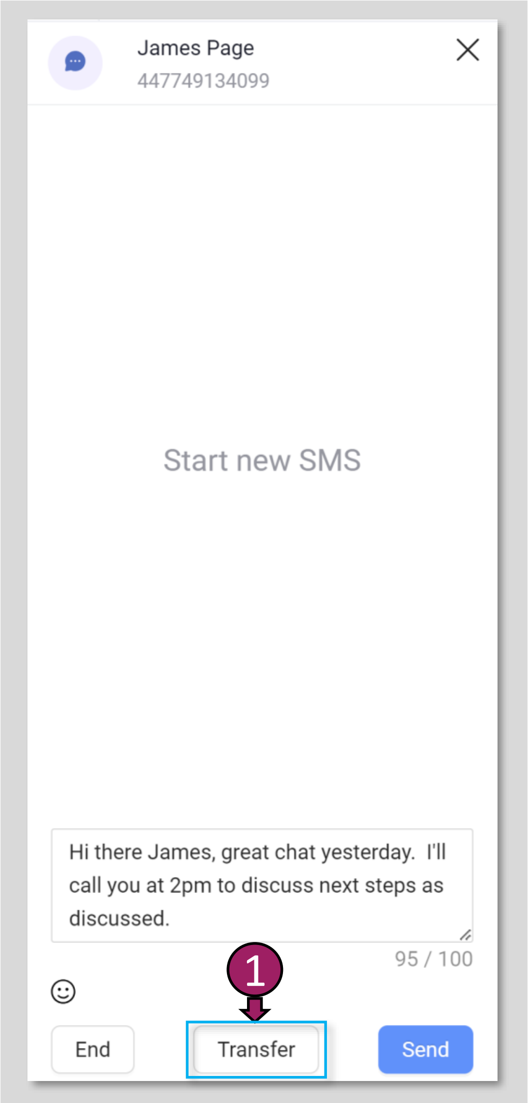
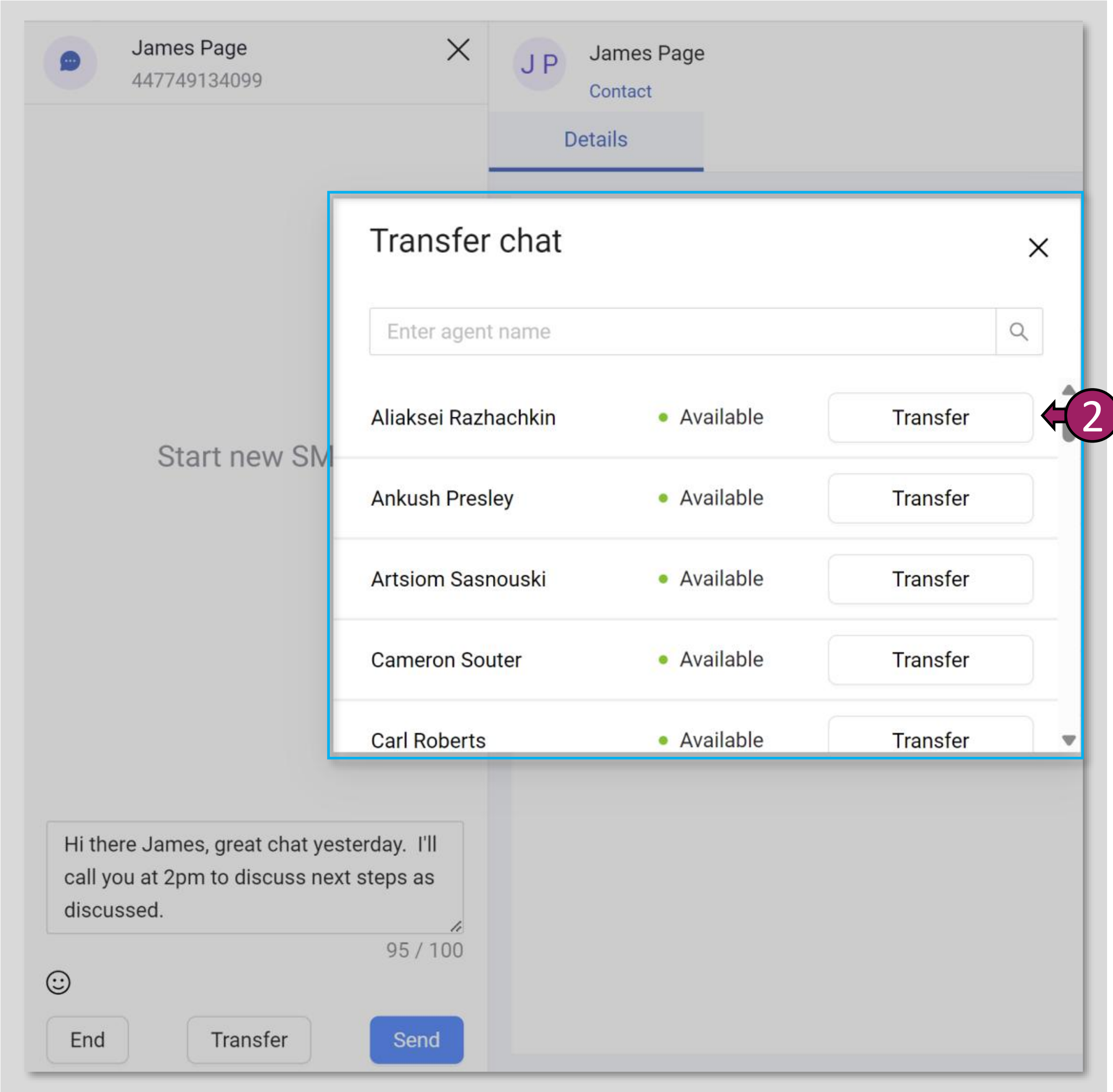



1 **Start a Transfer**

Select the transfer button to show an option of agents that you can choose from to blind transfer to entire message to another colleague.




2 **Select Agent & Blind transfer Message**

Select the transfer button to show an option of agents that you can choose from to blind transfer the entire message too.

# Message History

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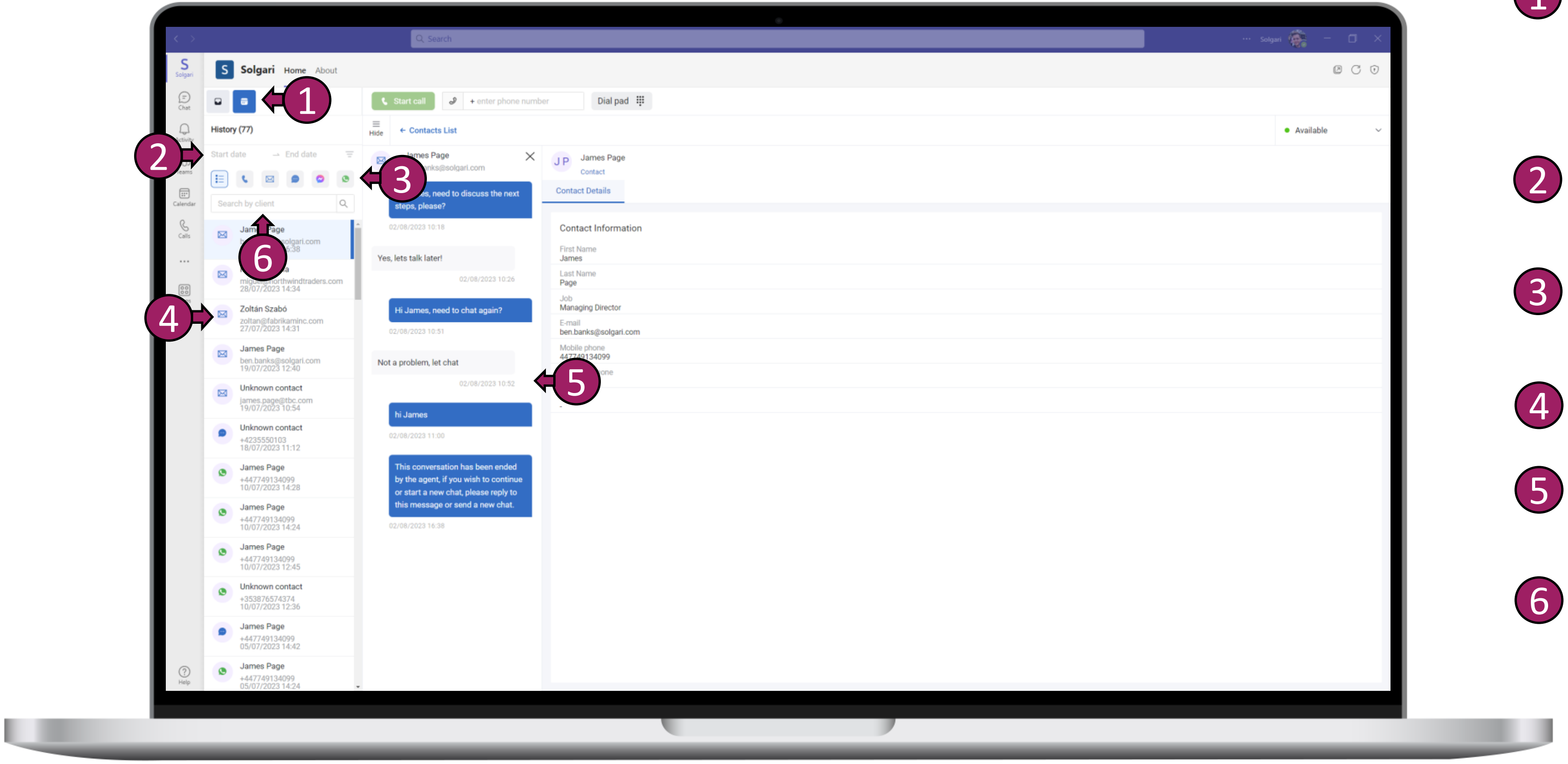


1. History - The history tab holds all your previous conversations with customers. Here you can retrieve message transcriptions per messaging channel.
2. Filter by date – Choose a specific channel and filter by date to find a specific transcription.
3. Filter by channel – Select a specific channel to only see transcription from there.
4. Activity Entry – Select an activity entry from the list.
5. Transcription – you will see the entire message between yourself and the customer.
6. Search by client name – You can search for a specific contact by typing their phone number or name here.

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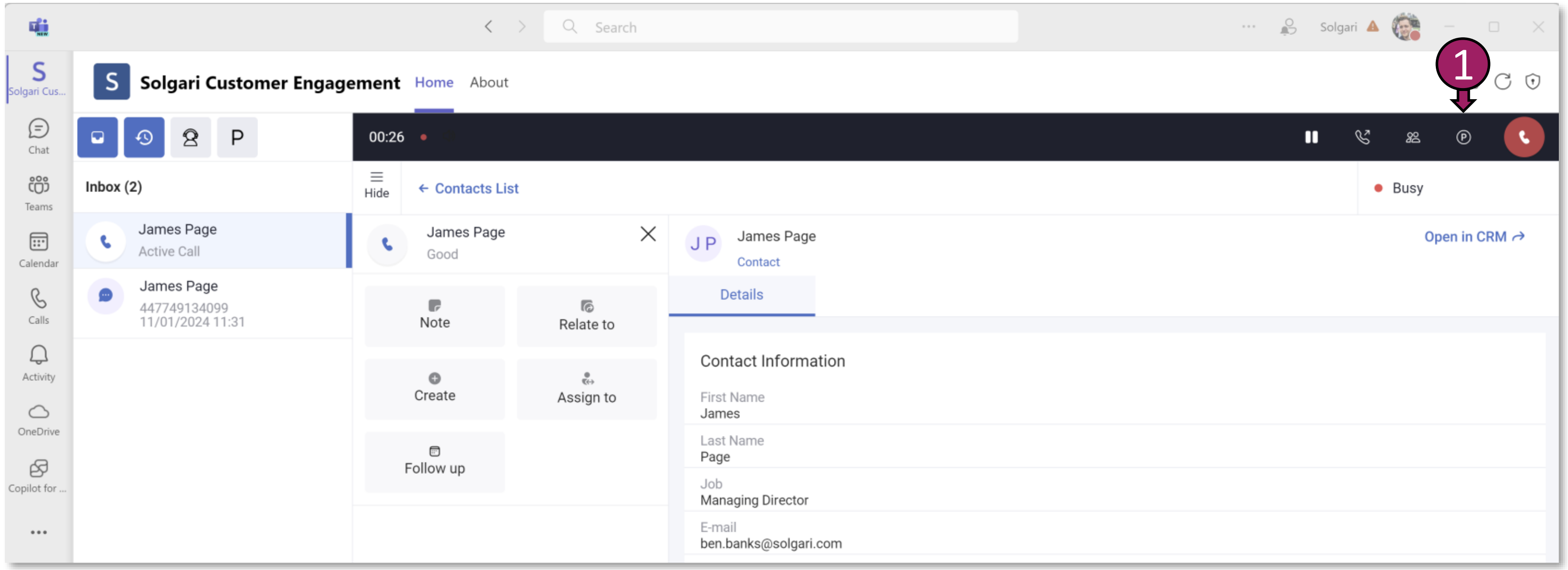
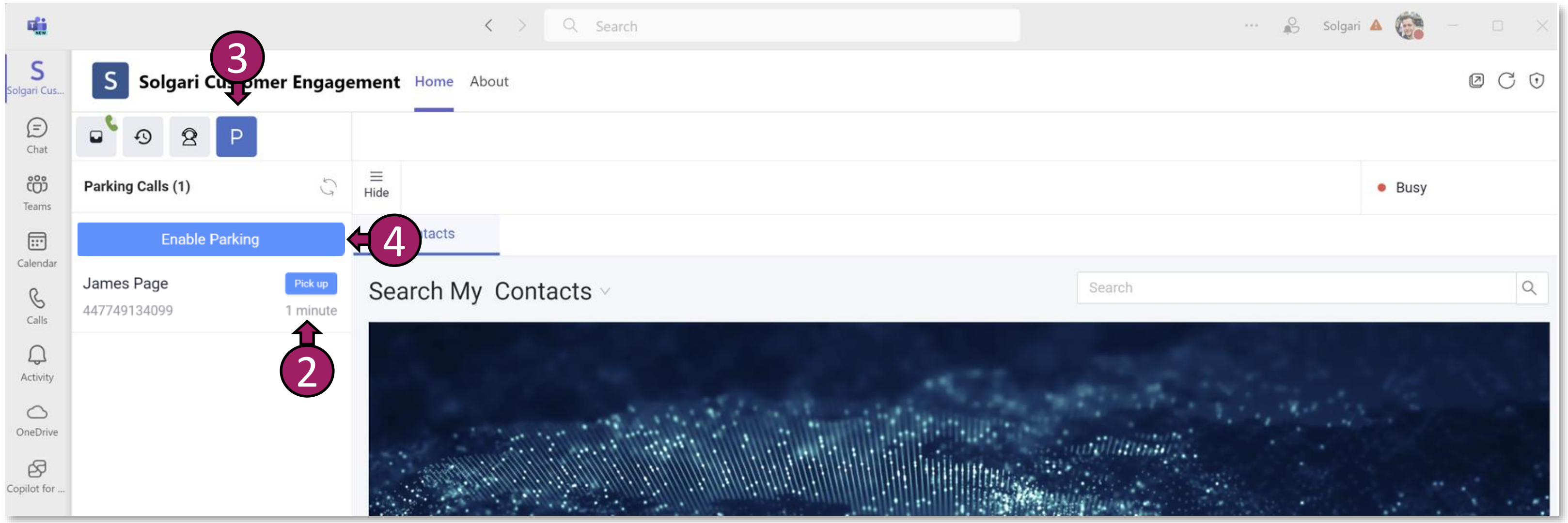
## Additional Features Section

# Call Parking




1 **Parking a call**

Select the call parking icon to park the customer in the parking queue.

2 **Unparking a Call**

Select the “Pick-up” button on any of the parked calls in the list to unpark the customer.

3 **Call Parking List View**

Select the Call Parking icon to see customers that have been parked. Select a customer to unpark from the list.

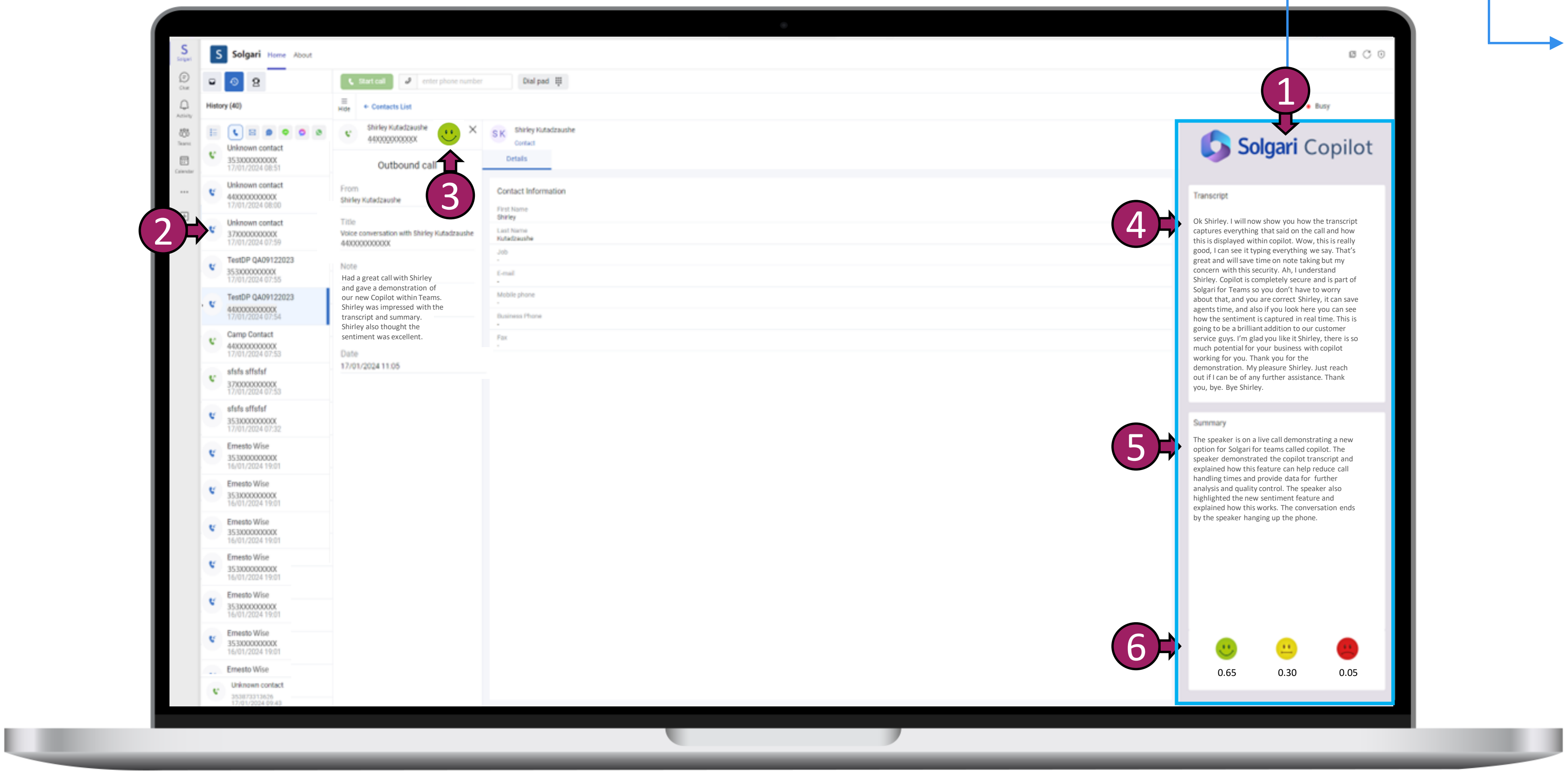
4 **Enable/Disable Call Parking**

You can only unpark customers from the call parking queue if you select “Enable Parking”. Once you have selected “Enable Parking” then you will be able to unpark any call from the queue. Just remember, when you enable call parking then this removes you from all other queues.

To resume your normal duties, select “Disable Parking” and this will bring you back to the normal queues.

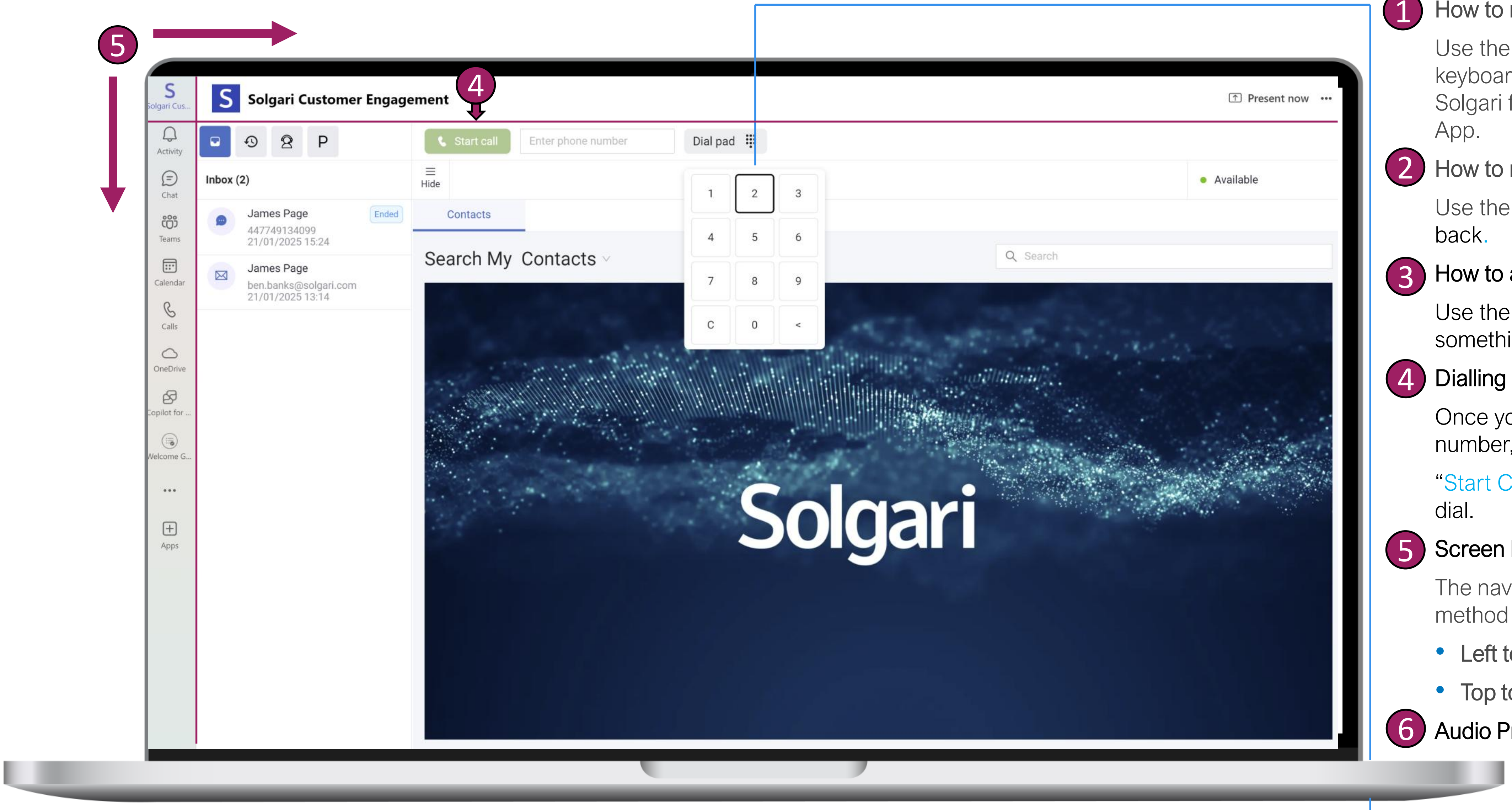
# Solgari Copilot – Conversational Summary & Overall Sentiment

## Solgari Copilot for Microsoft Teams




1. **Solgari Copilot** – Displays important and relevant details about the voice call or message conversation between an agent and the customer.
2. **History** – Select the entry from the list to see further details regarding your call or conversation.
3. **Sentiment** – Displays overall sentiment recorded for the call.
4. **Transcript** – A voice transcript is captured during the call along with the voice recording.
5. **Conversation Summary** – Solgari Copilot uses AI to review the entire conversation and pull-out key points within the call that matter, giving the agent a well-rounded synopsis of the conversation.
6. **Sentiment Grading** – A breakdown of the different sentiments captured during the call by %.

# Accessibility – How to navigate with your keyboard

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## 1 How to navigate forwards

Use the “Tab” button on your keyboard to navigate around the Solgari for Customer Engagement App.

## 2 How to navigate backwards

Use the “Shift+Tab” buttons to go back.

## 3 How to action

Use the “Enter” button to action something i.e. Select Inbox.

## 4 Dialling a number

Once you have inputted the number, use Shift+Tab to return to

“Start Call” then select “Enter” to dial.

## 5 Screen Navigation

The navigation follows a simple method

- Left to Right
- Top to Bottom

## 6 Audio Prompts

You will hear a prompt each time you navigate to a section of the app

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Please contact support for further details

supportticket@solgari.com