Solgari for Microsoft Teams User Guide

Contents

Solgari

Overview

Inbox Start Call Contacts List Contacts Search Dial Pad Session

Status Click-to-call Click-to-SMS Click-to-email

Call Activities

How to Answer a Call Call Session Answer a Call Contact's Information End a Call Open in CRM

Log Phone Call Activity Add a Note Relate to Create a New Account Assign to Existing Customer Follow-up Task In-Call Control Pause/Resume Call Recording On-Hold Mute Transfer Conference Hang-up

Wrapping up your Call Wrap-up Time Close the Channel

Message Activities

How to Handle a Message Select Message Contact Name Respond to a Message Send a Message End Conversation Contact Information

Message Blind Transfer Start a Transfer Select Agent and Blind Transfer

Message History History Filter by Date Filter by Channel Activity Entry Transcription Search by Client Name

Additional Features

Call Parking Unparking a Call Call Parking List View Turn Call Parking On or Off

Solgari CoPilot Copilot History Sentiment Transcript Conversation Summary Sentiment Grading

Accessibility Navigate Forward Navigate Backwards How to Action Dialling a Number Screen Navigation Audio Prompts

Overview Section



Overview



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

Overview - Continued



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00 Apps		Dwayne Eijan	281-555-0160	Send SMS	dwayne@alpineskihouse.com				
		Haroun Stormonth	423-555-0122	Send SMS	haroun@fabrikaminc.com				
		Kevin Martin	402	Send SMS	kevin@adatum.com				
		Miguel Garcia	614-555-0127	Send SMS	4 miguel@northwindtraders.com				
		Zoltán Szabó	423-555-0120	Send SMS	zoltan@fabrikaminc.com				
		Carla Yates	456-555-0156	Send SMS	carla@treyresearch.net				
		Alex Baker	619-555-0127	Send SMS	alex@treyresearch.net				
		Avery Howard	567-555-0137	Send SMS	avery@treyresearch.net				
		Kim Rocha	567-555-0157	Send SMS	kim@treyresearch.net				
		Cacilia Viera	281-555-0162	Send SMS	cacilia@alpineskihouse.com				
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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.

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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.



Search Contacts – Search all your Accounts, Contacts and Leads here.



Call Activates Section



How to answer a call





Call Session – you will see any inbound or outbound call session in the inbox.

Answer Call – Select the green phone icon to answer the call.

Contacts Information – You will see information about your customer here.

End Call – Select the red phone icon to end the call.

Open in CRM – Select this to open the customer record in your CRM.

Log a phone call activity



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Follow-up Task – Schedule a follow-up task and add to you CRM calendar for next steps.

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Call Control



> 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.

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- 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.



Hang-up - The red hang up button can be selected to decline the call.



Wrapping up your call



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Wrap-up time – Once a call has is hungup, 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.



Close Channel – Select close channel to remove it from your inbox. By selecting "Close channel" you will be immediately set to available.



Message Activities Section



How to handle a message



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Select message - Select the message in the inbox that you would like to respond to.



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.



Contact information – This is the customer information that we have gathered from your database.

Message Blind Transfer







Message History



History - The history tab holds all your previous conversations with customers. Here you can retrieve message transcriptions per messaging channel.

- 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.





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Transcription – you will see the entire message between yourself and the customer.

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







Parking a call

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



Unparking a Call

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



Call Parking List View

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



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

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.
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- **Sentiment** Displays overall sentiment recorded for the call.
- **Transcript** A voice transcript is captured during the call along with the voice recording.
 - **Conversation Summary** Solgari Copilot uses Al 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.
 - Sentiment Grading A breakdown of the different sentiments captured during the call by %.

Accessibility – How to navigate with your keyboard

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Please contact support for further details

supportticket@solgari.com

