

# User Guide

## Fireflies for Dynamics - A MICROSOFT DYNAMICS 365 SOLUTION

BY



DISCLAIMER

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# Fireflies for Dynamics

Fireflies for Dynamics is an integration between Fireflies and Dynamics 365 which allows you to record, transcribe, and automate meeting notes within Dynamics 365 Sales. All assistant Fred can join your Microsoft Teams meetings. After meetings, your notes will automatically be sent to Dynamics 365. A link to your call transcript, audio recording, and brief notes will be included. Fireflies for Dynamics has now revolutionized the way how teams communicate within Dynamics 365.

## Download Fireflies for Dynamics:

Please follow the following steps in order to start using Fireflies for Dynamics.

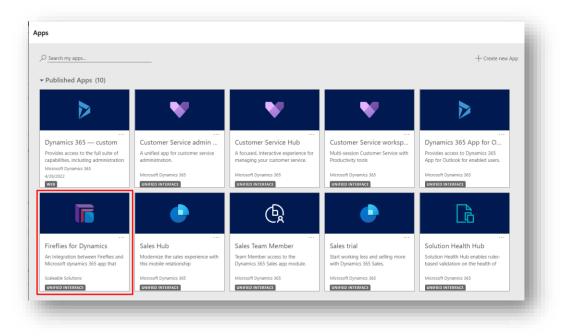
Download Fireflies for Dynamics from www.appsource.microsoft.com

#### Pre - Requisite:

To use Fireflies for Dynamics properly, the user must have the power automate premium subscription.

#### Dynamics 365 Apps

On Dynamics 365 apps you will find the Fireflies for Dynamics Application.



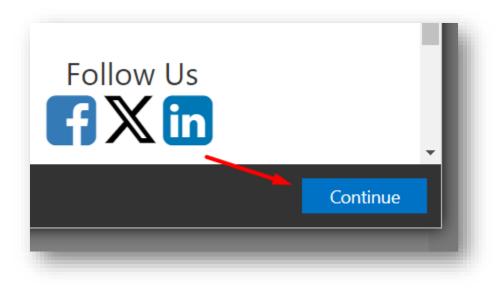
#### Click on Fireflies for Dynamics.

#### Welcome Screen

Welcome screen will appear. You can get Registered, Download User Guide and Learn More about the app and get access to our social Links from this page.

Firefiles for Dynamics	A
Fireflies for Dynamics is an integration between Fireflies and Dynamics 365 which allows you to record, transcribe, and automate meeting notes within Dynamics 365 Sales. Al assistant Fred can join your Microsoft Teams meetings. After meetings, your notes will automatically be sent to Dynamics 365. A link to your call transcript, audio recording, and brief notes will be included. Fireflies for Dynamics has now revolutionized the way how teams communicate within Dynamics 365. User Guide	
Learn More	
Do not show this Welcome Screen next time	▼ Continue

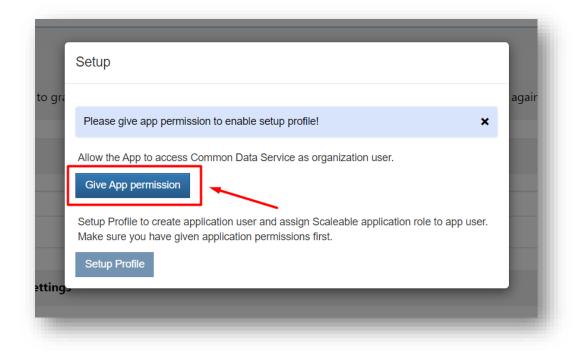
Click on **Continue** to get started.



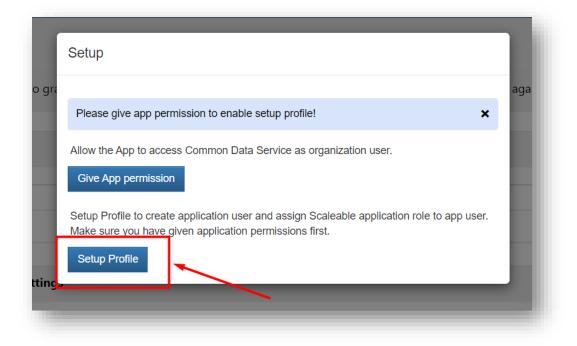
The **Configuration** page will open.

#### Setup:

Give app permissions to allow Fireflies for Dynamics to access the Common Data Service as an organization user.



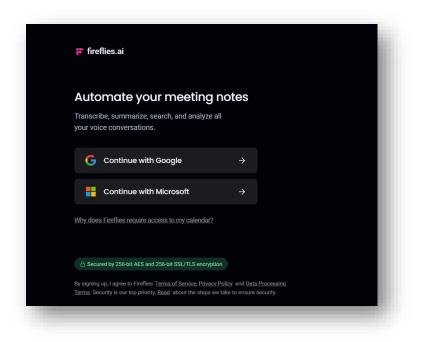
After giving permissions, the **Setup Profile** button will be made clickable. Click on the **Setup Profile** button to proceed further.



## Configuration

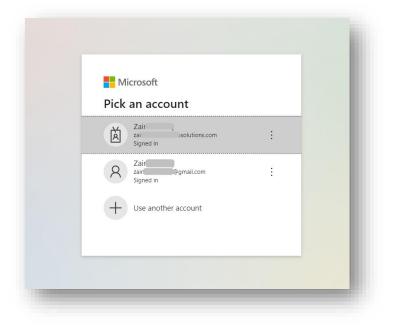
Login to your fireflies account. If you don't have an account on fireflies create one.

#### Creating Fireflies Account:



Choose any of the two Calendars in order to sync your meetings within Fireflies.

Fireflies will sync meetings either from the Google Calendar or an Outlook Calendar.



Sign in with your Microsoft Account.

Invite fred@fireflies.ai to a calendar invite	Your current meeting settings
Notebook	Marchines Conflict will be a
	Meetings fireflies will join
Meeting Status or use one of the options below to capture your meeting	Join all cal events with web-conf link
Uploads	Notes get sent to
Upcoming Meetings     Schedule Meetings     Jein all	Send recaps to everyone on the invite
Fred couldn't find meetings on your calendar for this week. Invite fred@fireflies.ai to a meeting on your calendar to capture it.	
å Team	
7 Upgrade	Add to live meeting
k Refer	Add now
> Settings	
Platform Rules	Upload An Audio File

Your account will be created successfully.

# Copy Fireflies API key:

From your fireflies home page, go to Integrations.

Y Home	Q Search Integration A	pps		•	
Notebook					
Meeting Status			0		
Uploads		asana		box	
Integrations	Aircall	Asana	Bluejeans	Box	
Topic Tracker	Dialer	Project management	Video conferencing	Storage	
a Team					
4 Upgrade	Close	:copper	•	0	
2, Refer			Dropbox		
Settings	Close	Copper	Dropbox Storage	Email	
Platform Rules			Ū		

fireflies.ai	Integrations		Transcription 3 credits left	♠ Storage         Z           2,979 mins         / 3,000 mins
		Q Fireflies		•
E Notebook				
4 Meeting Status				
[1] Uploads				
× Integrations		Fireflies API		
🗘 Topic Tracker		Custom		
온 Team				
☆ Upgrade				
옩, Refer				
Settings				
<ol> <li>Platform Rules</li> </ol>				Q Chat

Type Fireflies in the search section, select Fireflies API.

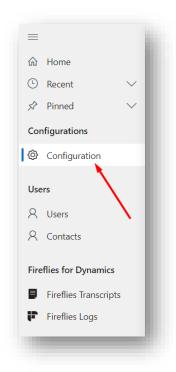
Copy the Fireflies API Key from fireflies by Clicking on **Copy**.

ir.			Transcription      ↔ Storage     3 credits left     2,979 mins / 3,000 mins
Q     Fireflies       P     T All	·	Fireflies	🅸 Settings Access meetings, contacts and team data with the Fireflies API
4           Fireflies           Custom	API	Access meeting data via	Usage beyond 50 api calls per day requires a Business account. Conta support@fireflies.ai with questions GraphQL API Endpoint:
× G		API Resources	https://api.fireflies.ai/graphql Your API Key:
≗ ☆ &		See docs	Use your API Key in the Authorization header
@ (1)			{ "Authorization": "Bearer 005be059ad11e34adf4161408d0361a }
	_		() Chat

# Paste Fireflies API key:

Click on **Configuration** from site map.

Note: Make sure to register before configuring.



Paste the Fireflies API key in API Configuration of Fireflies Settings and Click on **Save** button.

Enter fireflies Ani	
Enter fireflies Api Key:	Save

Your fireflies account will be successfully connected with Fireflies for Dynamics.

#### How to Create Meetings:

To create meetings with Fireflies open your <u>fireflies</u> App.

#### Click on **Schedule Meeting** from Home page.

fireflies.ai		Transcription Storage 2 credits left 759 mins left / 800 mins
Home	Welcome to Fireflies	Your current meeting settings Meetings Fireflies will join
Meeting Status	Invite fred@fireflies.ai to a calendar invite or use one of the options below to capture your meeting	Join all calendar events with web-conf link:
고 Uploads	Fireflies needs to stay on for at least 3 minutes to process the meeting transcript. $\qquad \qquad \qquad$	Notes get sent to
< Integrations		Send recaps to everyone on the invite 🔹
H Topic Tracker	() Upcoming Meetings () ()	
~ Analytics (Beta)	11 AM Meeting	
3ª Team	Fri, May 13th () 11:42 PM	Add to live meeting
2 Upgrade	✓ No other meetings in the next 2 days	Add now
2. Refer		
ခွာ Settings		☐ Upload an audio file
Platform Rules		You can drop MP3 and WAV files here.
		Browse Files

Choose the **Outlook Calendar** to schedule your meeting.

	e of the options below to capture your meeting	oL
stay on for	Schedule Meeting via X	Notes
Meeting		Se
	Google Calendar	
ງີ 11:42 PN	Microsoft Outlook Calendar	( <u>***</u>
		A.

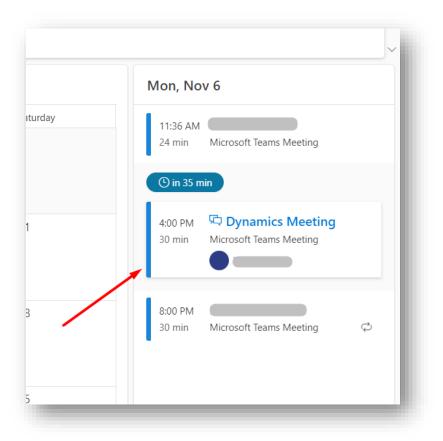
Click on the desired slot to schedule the meeting.

<ul> <li>October 2023</li> </ul>			Manage Calendars	Share Fi	nd		~
	Washington, D.C. 👻 🌙 🌆	day °F/48°F 👉 71°F/48°F	Mednesday S8° F / 52° F Search Birthdays				Q
DAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY	E
25	26	27	28	29	30	Oct 1	
	3	4	5	6	7	8	-91
	10	11		13	14	15	Next Appointment
	17	18	19	20	21	22	
	24	25	26	27	28	29	
		3	3         4           10         11           17         18	3         4         5           10         11         1           17         18         19	3         4         5         6           10         11         1         13           17         18         19         20	Image: second	Image: series of the series

Enter **Title**, Add **attendees** and select the appropriate time slot, then click on **Send** to send meeting invites.

Scheduling Assistant			
tesponse options 🗸 🔤 Busy 🗸 🗓 15 minutes before 🗸	🖓 Categorize 🗸 👩 Private 🗖 Schedu	ling poll ····	~
+ 2 attendees are in different time zones. Use the Sc time zones.	heduling Assistant to select times across		
Send V Calendar V		4 PM 4:00 PM - 4:30 PM You are available	•
Dynamics Meeting	Optional	5 PM	
Suggested times	Preferences	6 PM	
Mon 11/6 4:00 PM - 4:30 PM 4:30 PM - 5:00 PM	Mon 11/6 5:00 PM - 5:30 PM	7 PM	
Available: Everyone     Available: Everyone	Available: Everyone	8 PM	
11/6/2023         Image: Big decomposition         4:30 PM         ✓         ●         All day         ●           11/6/2023         Image: Big decomposition         Image: Big decomposition         ✓         Ono't repeat         ✓	Time zones	9 PM	
Search for a room or location	C 🚺 Teams meeting	10 PM	

After this your meeting will be created.



Whenever your meeting starts, **Fred** will automatically join the meeting and generate transcripts.

## Fireflies Meeting Settings:

You can change your meeting settings that fireflies will join from **Home** page of Fireflies.

fireflies.ai		Transcription
Home	Welcome to Fireflies	Your current meeting settings
Notebook	weiconne to rirennes	Meetings Fireflies will join
Meeting Status	Invite fred@fireflies.ai to a calendar invite or use one of the options below to capture your meeting	Join all calendar events with web-conf link
Uploads	Fireflies needs to stay on for at least 3 minutes to process the meeting transcript. $$	Join all calendar events with web-conf link
Integrations		Join only calendar events that I own
Topic Tracker	() Upcoming Meetings () () Schedule Meetings Join all	Join calendar events only when I invite fred@fireflies.ai Join only internal events
Analytics Beta	11 AM Meeting	zynab2.onmicrosoft.com teammates
Team	Fil, May T3th () 11-42 PM	Join only external events non- with zynab2.onmicrosoft.com
ት Upgrade	No other meetings in the next 2 days	Add now

You can also change the **Notes get sent to** Settings from here.

F fireflies.ai		Transcription
😚 Home	Welcome to Fireflies	Your current meeting settings
Notebook		Meetings Fireflies will join
4 Meeting Status	Invite fred@fireflies.ai to a calendar invite or use one of the options below to capture your meeting	Join all calendar events with web-conf link
고 Uploads	Fireflies needs to stay on for at least 3 minutes to process the meeting transcript. $\qquad \qquad \qquad$	Notes get sent to
Integrations		Send recaps to everyone on the invite
Topic Tracker	() Upcoming Meetings () () Schedule Meetings Join all	Send recaps to only me and my teammates
~ Analytics Beta	11 AM Meeting	Send recaps to everyone on the invite
Se Team	(ii) Fri, May 13th () 11:42 PM	Send recaps to only me
	✓ No other meetings in the next 2 days	Add now

#### Contacts Creation:

You can make your meeting participants as your CRM contacts if they are not already existing.

Note - Make sure that you are using either Google Or Outlook Calendar to schedule your meetings and that all your meeting participants are getting invitations to attend the meeting otherwise your meeting participants will not be added to the CRM.

For this go to **Configuration** page and switch the toggle button under **Contacts Creation** heading to turn **On** this feature.

û Home ③ Recent → ☆ Pinned →	Configurations Configure the CRM with fireflies to grab the meeting transcripts, create meeting participants as contacts, and log the notes against them.
Configurations	FireFlies Integration
Users R Users	Enter fireflies Api Key:
Contacts	FireFies Integration Settings
Fireflies Transcripts	Do you want to make all meeting participants as CRM contacts, if not already exists?
- Themes Logs	Click the button if you want to grab the CRM User past meetings and save participants and notes in CRM Sync
l	

#### Sync Fireflies Past Meetings to Dynamics 365:

To keep a record of all fireflies meetings conducted with your clients, sync the past meetings created in Fireflies to Dynamics 365. To Activate the sync meeting configuration, Click on **Sync** button.

<ul> <li>➡</li> <li>↔</li> <li>↔</li> <li>Accent</li> <li>✓</li> <li>✓</li> <li>Pinned</li> <li>✓</li> </ul>	<b>Configurations</b> Configure the CRM with fireflies to grab the meeting transcripts, create meeting participants as contacts, and log the notes against them.	
Configurations	FireFlies Integration	
Users 8 Users	Enter fireflies Api 09a227ce15de96fa88d5d5b107c0a4b5 Save	
R Contacts	FireFies Integration Settings	
Fireflies for Dynamics Fireflies Transcripts Fireflies Logs	Do you want to make all meeting participants as CRM contacts, if not already exists?	
<ul> <li>Firefiles Logs</li> </ul>	Click the button if you want to grab the CRM User past meetings and save participants and notes in CRM Sync	

# Fireflies for Dynamics Roles:

There are three type of roles here:

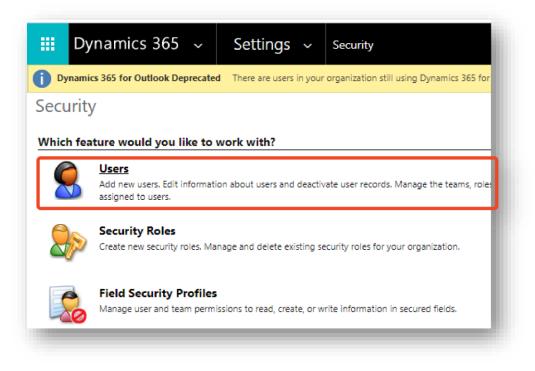
- Fireflies for Dynamics Admin: User with "Fireflies for Dynamics Admin" role will have all permissions of Fireflies for Dynamics entities.
- Fireflies for Dynamics Read: User with "Fireflies for Dynamics Read" role will only be allowed to read entities of Fireflies for Dynamics except registration.
- Fireflies for Dynamics Service:

"Fireflies for Dynamics Service" role should be assigned to the user for the connections and configurations. This role will be automatically assigned to the App User when you setup the profile.

## Assign Fireflies for Dynamics Role

To assign roles to the users go to **Settings > Security > Users** 

Dynamics 365 🗸	Settings ~ Solutio	ons >	
Settings			
Business	Customization	System	
Business Manageme	Customizations	🕹, Administration 🖸	C Em
Templates	Solutions	Security	Act
Product Catalog	Microsoft AppSource	Security: Add users, plus access	settings
8 -			



Select the user to assign role and click Mange Role.

D	yna	mics 365 Settin	<b>gs →</b> Securit	у				
+ NEW	/	EDIT 💐 APPROVE EMAIL	➡ REJECT EMAIL	♣ PROMOTE TO ADMIN	MANAGE ROLES	CHANGE BUSIN	iess unit 🛛 👶 cha	NGE MANAGER
꾸	Ena	abled Users 👻						
		Full Name ↑		Site	Business Unit	Title	Position	Main Phone
~		Zaina			org0.			1

#### Assign role to the user

Manage User Roles What roles would you like to apply	y to the 1 User you have :	× selected?
1		
Role Name	Business Unit	
FileStoreService App Access	org05d39d0d	<b>^</b>
Fireflies for Dynamics Admin	org05d39d0d	
Fireflies for Dynamics Read	org05d39d0d	
Fireflies for Dynamics Service	org05d39d0d	
Flow-CDS Native Connector Role	org05d39d0d	
Flow-RP Role	ora05d39d0d	•
	OK	Cancel

After selecting the desired role, Click on **Ok**.

# Fireflies Transcripts:

After the Fireflies user is synced, all your fireflies meetings will be listed in fireflies transcripts.

Select any meeting to open its o	details.
----------------------------------	----------

Recent V	Activ	e Fireflies Transcripts $\vee$	Edit columns	√ Edit filters   √ Filter by keyword
Pinned V		Name ↑ ~	Meeting Date ~	Created On ~
Configuration		Al Seminar	5/11/2022	11/6/2023 6:18 AM
		Daily Scrum 11/03/2023	5/11/2022	11/6/2023 6:18 AM
Users		From Google meet	3/5/2023	11/3/2023 11:49 AM
Contacts		IT Team Meeting	5/11/2022	11/6/2023 6:18 AM
		Power Platform Webinar	5/11/2022	11/6/2023 6:18 AM
flies for Dynamics		Scaleable Scrum	11/6/2023	11/6/2023 6:54 AM
Fireflies Transcripts Fireflies Logs		Team Discussion	12/15/2021	11/6/2023 6:18 AM
Fireflies Logs		Teams Meet	12/17/2021	11/6/2023 6:18 AM
		Voice Test	12/15/2021	11/6/2023 6:18 AM

The meeting details contain Meeting **Title**, **Meeting Date**, **Meeting Duration** and **Meeting Participants**.

Scaleable SCru Fireflies Transcript	IM - Saved			
General Transcr	ipt Contacts Related $\vee$			
ieneral				
itle * 🗅	Scaleable Scrum	Owner * 🗅	FA <u>Fireflies Admin</u>	
/leeting Date ⊡	11/6/2023	Meeting Duration 🖨	10	
			10	
	zaina @gmail.com,zyn @gmail.com,aze			

It also contain links to access transcript and audio of the meeting.

Transcript URL 🗅	https://app.fireflies.ai/view/dJM	$\oplus$
Transcript Audio   ☺ JRL	https://app.fireflies.ai/view/dJM	$\oplus$

Click on the browser icon next to the **Transcript URL** link to access the meeting transcript.

ranscript URL 🗅		
ranscript OKL ©	https://app.fireflies.ai/view/dJM	•
ranscript Audio 🛛 🖻	https://app.fireflies.ai/view/dJM	•
JRL		

Click on the browser icon next to the **Transcript Audio URL** link to access the meeting audio.

Transcript URL 🗄	https://app.fireflies.ai/view/dJM	$\oplus$
Transcript Audio 🛛 🖨 URL	https://app.fireflies.ai/view/dJM	

#### Transcript Contacts:

To see the Transcript contacts, open a meeting record from **Fireflies Transcripts.** 

Move to the Transcript Contacts tab.

≡ 命 Home		← 🗉 🖬 Save 🛱 Save & Close 📑 Deactivate
Recent	$\sim$	Scaleable Scrum - Saved
🖈 Pinned	$\sim$	Fireflies Transcript
Configurations		General Transcript Contacts Related $\checkmark$
Ornfiguration		
Users		<b>`</b>
A Users		Full Name ↓ ∽
-		

All your meeting participants will be displayed here.

neral	Transcript Contacts Relate	$_{ m ed}$ $\sim$			
				🖄 Add Existing	Contact 🖒 Refresh <u>:</u>
	Full Name ↓ ~	Email ~	Company Name ~	Business Phone ~	Status ~
	zyna @gmail.com	zyn	j@gmail.com		Active
	zaina @gmail.com	zaina	@gmail.com		Active
	aze @gmail.com	azec	@gmail.com		Active

You can also add existing contacts to the list.

For this, click on **Add Existing Contact**.

	🖄 Add Existing Contact 🖒 Ref	resh :
Company Name 🗸	Business Phone Y Status Y	
	Active	
	Active	
	Active	

Choose the contact and click on **Add** button at the bottom of the quick create form.

< 🛛 <u>Alex Baker</u> ×	>
Add more records	م
<ul> <li>← AII</li> <li>Contacts</li> </ul>	
Avery Howard avery@treyresearch.net	~
aze @gmail.com aze @gmail.com	
Cacilia Viera           cacilia@alpineskihouse.com	$\sim$
Carla Yates carla@treyresearch.net	$\sim$
Dwayne Elijah dwayne@alpineskihouse.com	~
R Haroun Stormonth haroun@fabrikaminc.com	$\sim$
Heriberto Nathan heriberto@northwindtraders.com	$\checkmark$
R Kevin Martin kevin@adatum.com	$\checkmark$
🖂 Kim Rocha	~ /
+ New Contact	Advanced lookup
Add	Cancel

The selected contact will be added to the list.

neral	Transcript Contacts Related ∨					
				🖉 Edit 🖪 Acti	ivate 🗋 Deactivate	:
	Full Name $\downarrow$ ~	Email ~	Company Name ~	Business Phone ~	Status ~	
	zyn@gmail.com	zyn @gmail.com			Active	
	zair @gmail.com	zain @gmail.com	n		Active	
	aze@gmail.com	aze @gmail.com			Active	
	Alex Baker	alex@treyresearch.net	Trey Research	<u>619-555-0127</u>	Active	

All the Non-Existing contacts from meeting participants will be created in Dynamics contacts.

Open the contact to see the related transcripts.

For this, click on any of the Transcript Contacts.

				🖉 Edit 🖪 Act	tivate 🗋 Deactivate :
	Full Name ↑ ∽	Email ~	Company Name ~	Business Phone ~	Status ~
~	Alex Baker	<u>alex@treyresearch.net</u>	Trey Research	<u>619-555-0127</u>	Active
	aze @gmail.com	azee k@gmail.com			Active
	zair @gmail.com	zain @gmail.co	m		Active
	zyn@gmail.com	zyn @gmail.com			Active

The contact record will be opened.

Home Recent V							
Pinned V	Alex Bake	e <b>r</b> - Saved					
Configurations	Summary Transcr	ipts Details Files	Related $\vee$				
-		ipts Details Thes	Kelateu 🗸				
Configuration	CONTACT INFORMATIO	ON		Timeline			
Users				Search timeline	+	Ы У ↓≡ :	
A Users	First Name	Alex					
8 Contacts	Last Name *	Baker		Enter a note		0	
	case rame	Dakei		∨ Recent			
Fireflies for Dynamics	Job Title	Cafeteria Manager		JJ Modified on: 10/22/2			
Fireflies Transcripts	Account Name	Trey Research ×	Q	Closed	Jeremy Johnson	8, <u>p</u> e İİ	
Fireflies Logs	/ lood and raine	I ITEY Research ~	~		vice Warranty Trey Res		
	Email	alex@treyresearch.net		5	warranty on purchase		
	Business Phone	619-555-0127	S	View more		~	
	business mone	619-555-0127	6	Opportunity: 🕂 5 Ca	fé A-100 Automatic	$\sim$	
	Mobile Phone	619-555-0129	B	JJ Modified on: 10/22/2	023 7:18 PM		
	Fax	C10 FFF 0120		Meeting from: A	Jeremy Johnson	8, <u>p</u> E 🗎	
	1 dA	619-555-0128		Review the final quot	ation		
	Preferred Method of	Any		View more		$\checkmark$	

Now move to the Transcripts tab.

∃ } Home		🔚 Save 🍃 Start Meeting 🛔	Save & Close + New 🏚 Open org chart	📘 Deactive	ate <sup>P</sup>	ලී Connect
<ul> <li>B Recent ∨</li> <li>S<sup>2</sup> Pinned ∨</li> </ul>	Alex Ba	<b>ker</b> - Saved				
Configurations	Summary Trans	scripts Details Files Relat	$ed \sim$			
Ornfiguration						
	CONTACT INFORMA	πιον	Timeline	+ 🗆	$\mathbf{\nabla}$	ī≣ ÷
Users	First Name		$ \mathcal{P} $ Search timeline			
A Users	First Name	Alex	Enter a note			Û
8 Contacts	Last Name *	Baker				
Fireflies for Dynamics	Job Title	Cafeteria Manager	Recent     Modified on: 10/22/2023 7:18 PM			
Fireflies Transcripts	Account Name	Trey Research ×	Meeting from: $\%$ Jeremy Johnson Closed	n R,	<u>P</u>	e, İİ
Fireflies Logs	Email	alex@treyresearch.net	Discussion on the Service Warranty T Cross selling a service warranty on p			
	Critan	alex@treyresearch.het	View more			

All the related transcripts for which the contact is the participant of, will be displayed here.

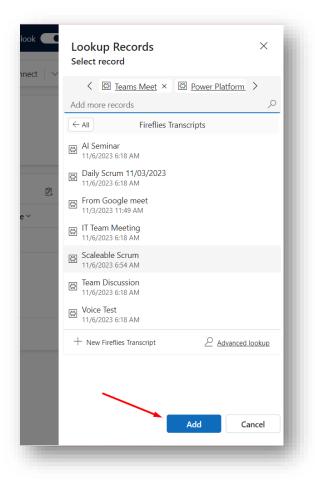
≡ 命 Home	← 🗉 🖂 Save 🕞 Start Meeting 🛱 Save & Close + New 🎭 Open org chart
<ul> <li>€ Recent</li> <li>✓</li> <li>✓</li> <li>✓</li> </ul>	Alex Baker - Saved Contact
Configurations	Summary <b>Transcripts</b> Details Files Related $\vee$
Users	Name ↑ ∽
A Contacts	Scaleable Scrum
<ul> <li>Fireflies Transcripts</li> <li>Fireflies Logs</li> </ul>	

You can also add the Existing Transcripts in the list.

For this, Click on Add Existing Fireflies Transcript.

	Ċ,	Add Existing Fireflies T	Q	Refresh	÷
Meeting Date $\sim$	1	Created On ~			
11/6/2023	/	11/6/2023 6:54	1 AM		

Choose the Transcript from the Lookup and Click on **Add** button on the bottom of the form.



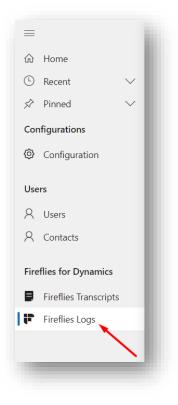
Your selected transcripts will be added to the list.

🥑 Co	ex Baker - Saved ntact		ZT Zainab Tariq Owner	$\checkmark$
immary	Transcripts Details Files Related ~			
		🖉 Edi	t 🖪 Activate 🗋 Deactivate	:
	Name ↑ ∽	Meeting Date ~	Created On ~	
	Power Platform Webinar	5/11/2022	11/6/2023 6:18 AM	
	Scaleable Scrum	11/6/2023	11/6/2023 6:54 AM	
	Teams Meet	12/17/2021	11/6/2023 6:18 AM	
Rows: 3	Selected: 2			

## Fireflies logs:

A Meeting Log record will be created whenever you will sync your previous meetings.

To view the Meeting Logs, Click on Fireflies logs from the sitemap.



## Uninstall:

If you wish to uninstall Fireflies for Dynamics, go to **Solutions.** Select Fireflies for Dynamics and click on **Delete**.

