



**Fireflies for Dynamics**

## **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. AI 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.

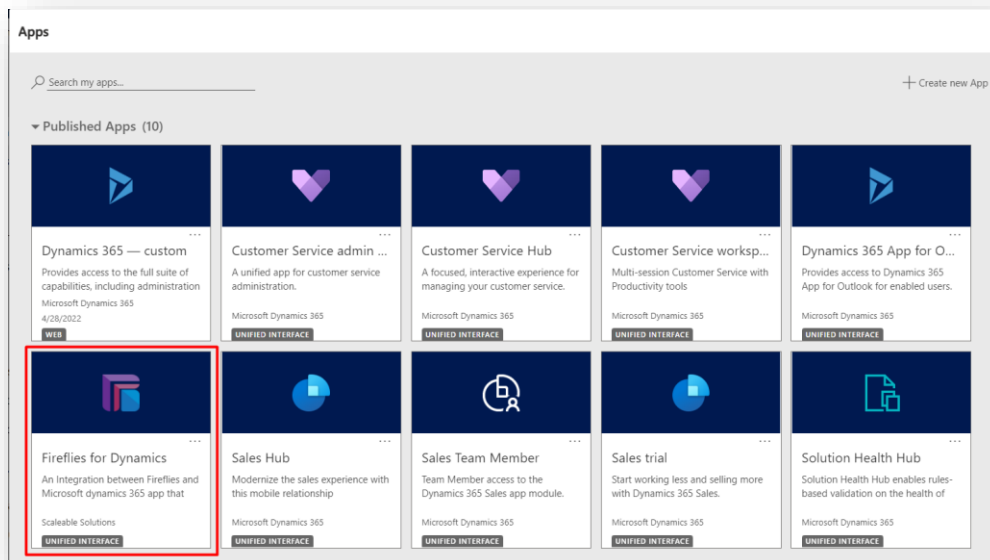
Download Fireflies for Dynamics from [www.appsource.microsoft.com](http://www.appsource.microsoft.com)

## Pre - Requisite:

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

## Dynamics 365 Apps

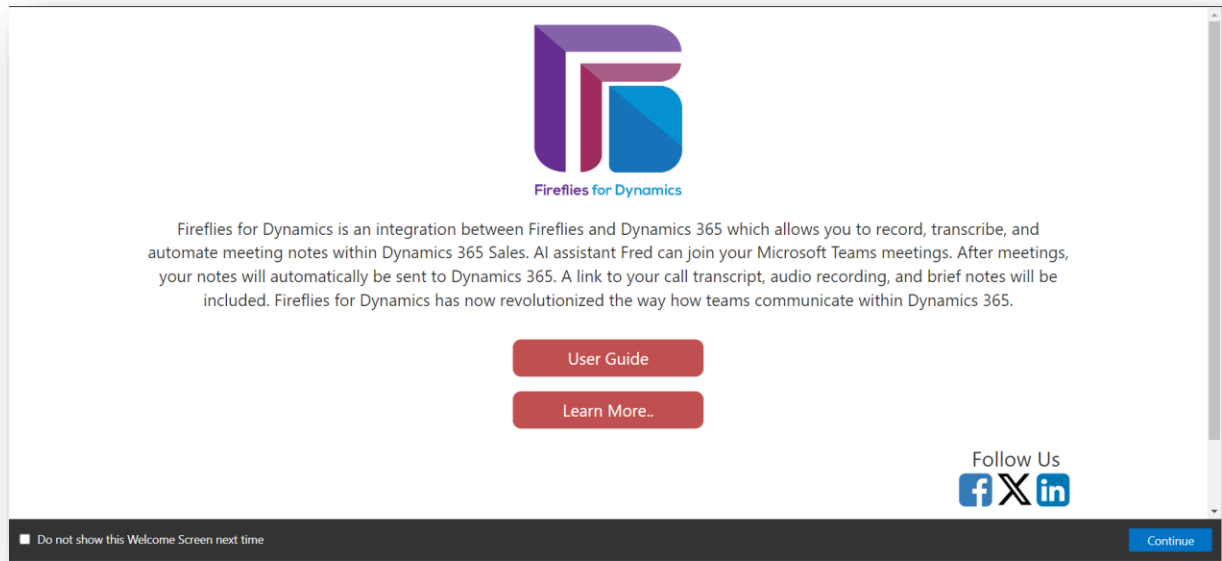
On Dynamics 365 apps you will find the Fireflies for Dynamics Application.



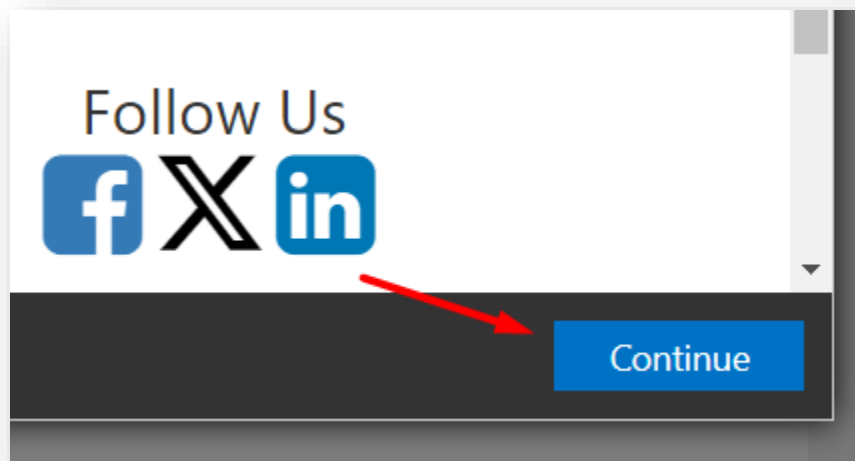
Click on **Fireflies for Dynamics**.

## 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.



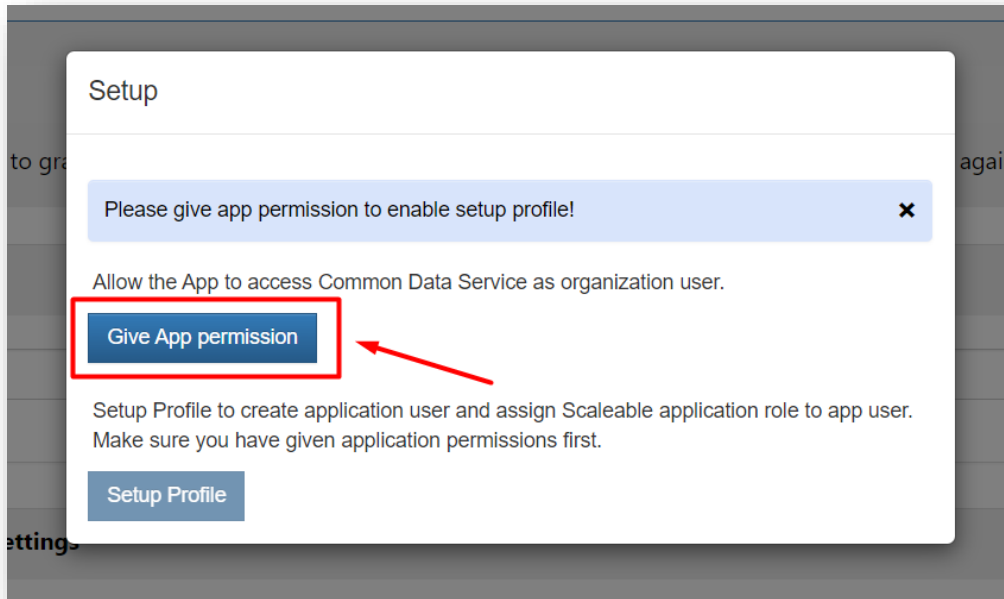
Click on **Continue** to get started.



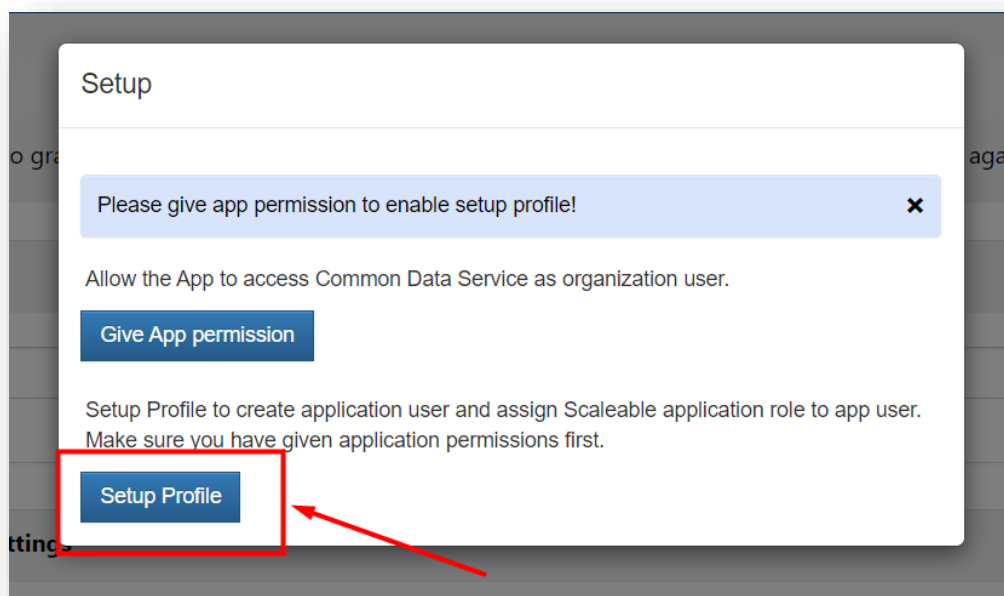
The **Configuration** page will open.

## Setup:

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



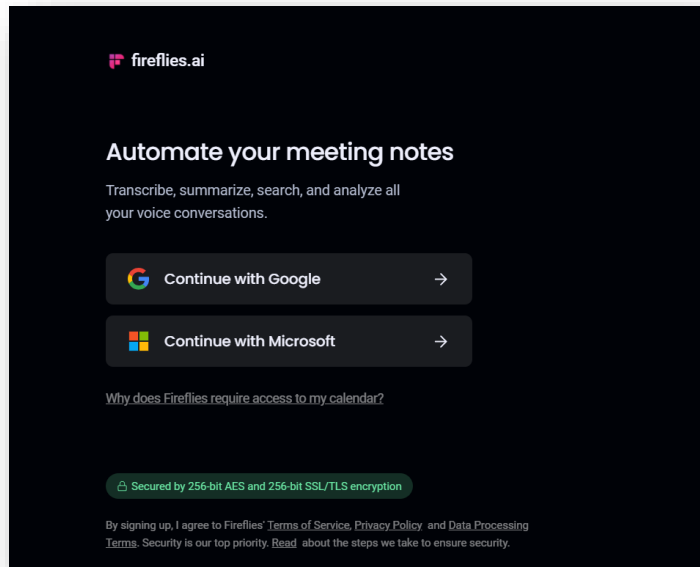
After giving permissions, the **Setup Profile** button will be made clickable. Click on the **Setup Profile** button to proceed further.



## Configuration

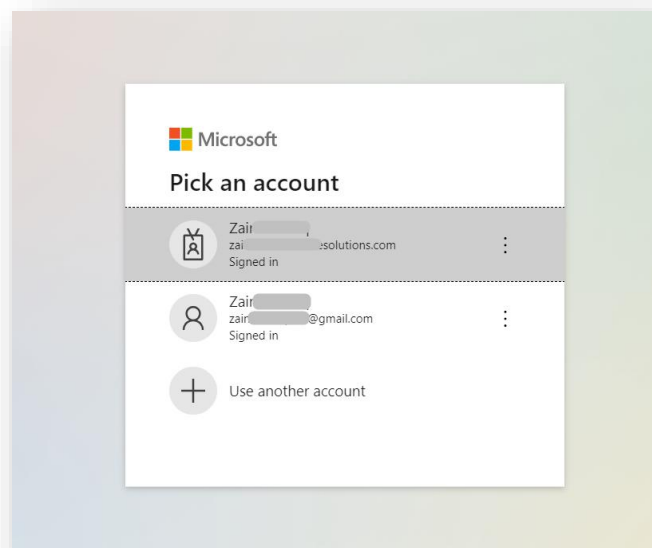
Login to your fireflies account. If you don't have an account on fireflies [create](#) one.

### Creating Fireflies Account:

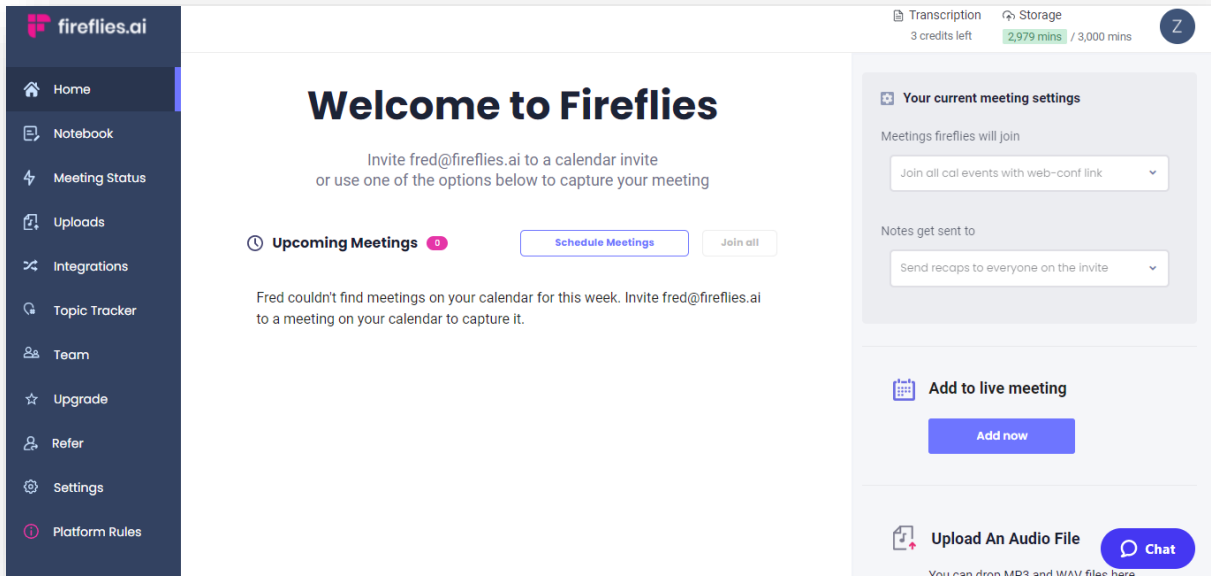


Choose any of the two Calendars in order to sync your meetings within Fireflies.

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



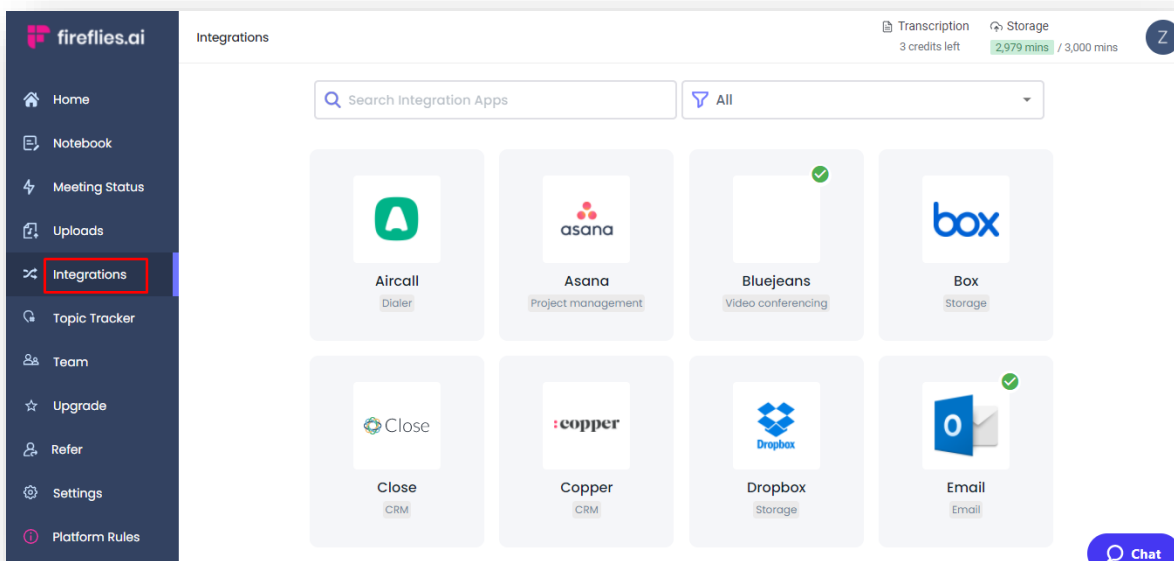
Sign in with your Microsoft Account.



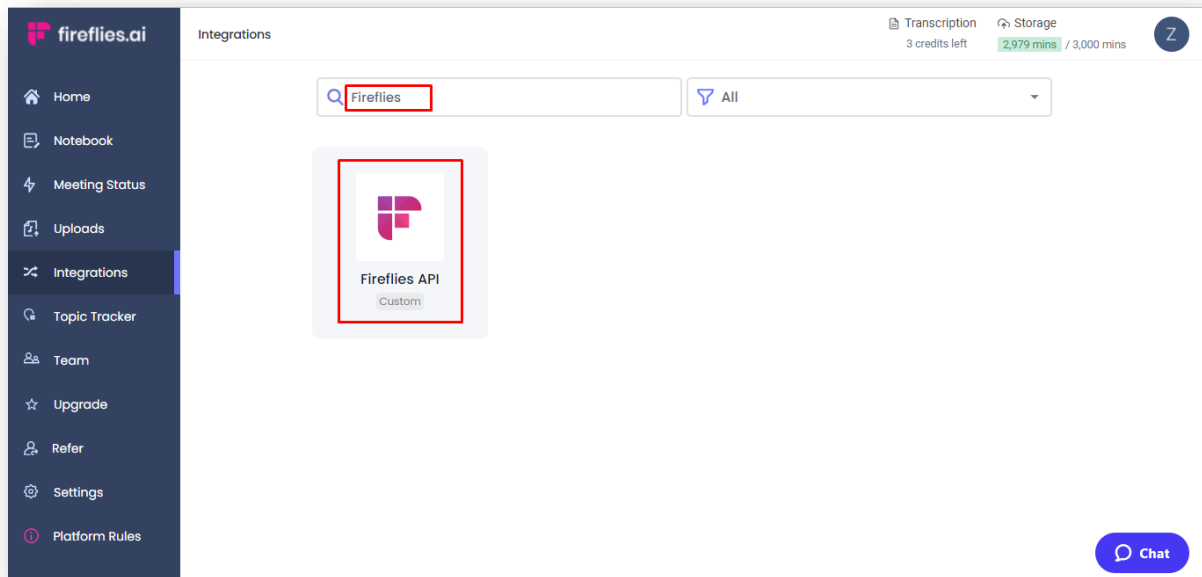
Your account will be created successfully.

Copy Fireflies API key:

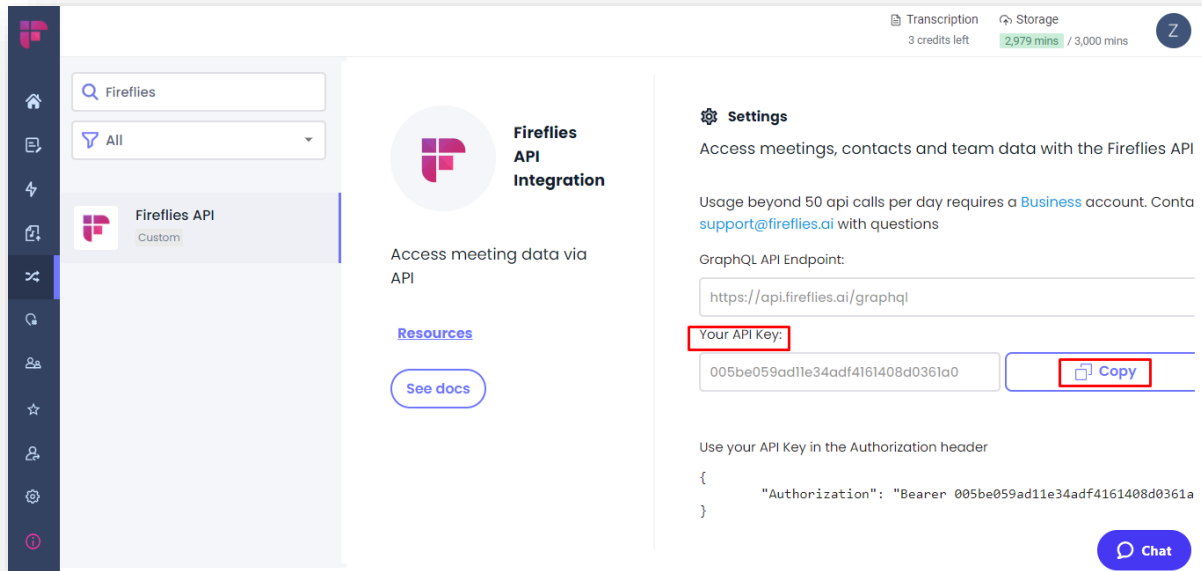
From your fireflies home page, go to Integrations.



Type **Fireflies** in the search section, select **Fireflies API**.



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

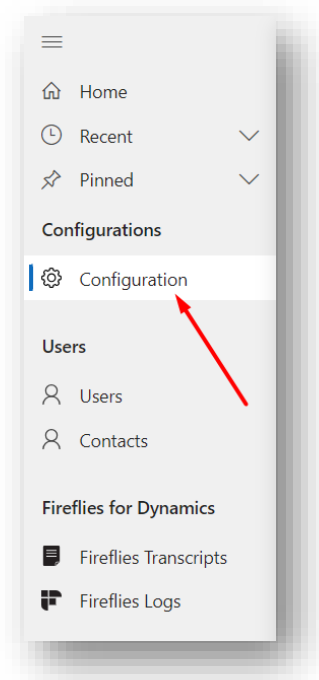




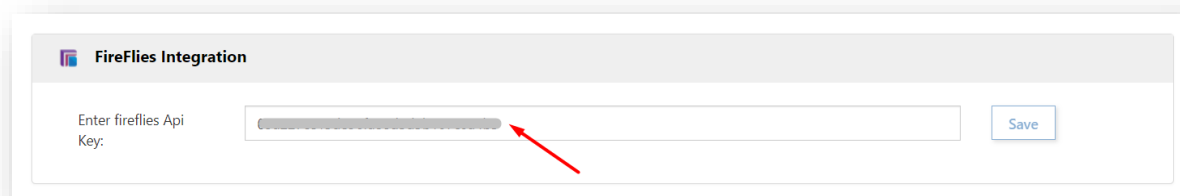
Paste Fireflies API key:

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.

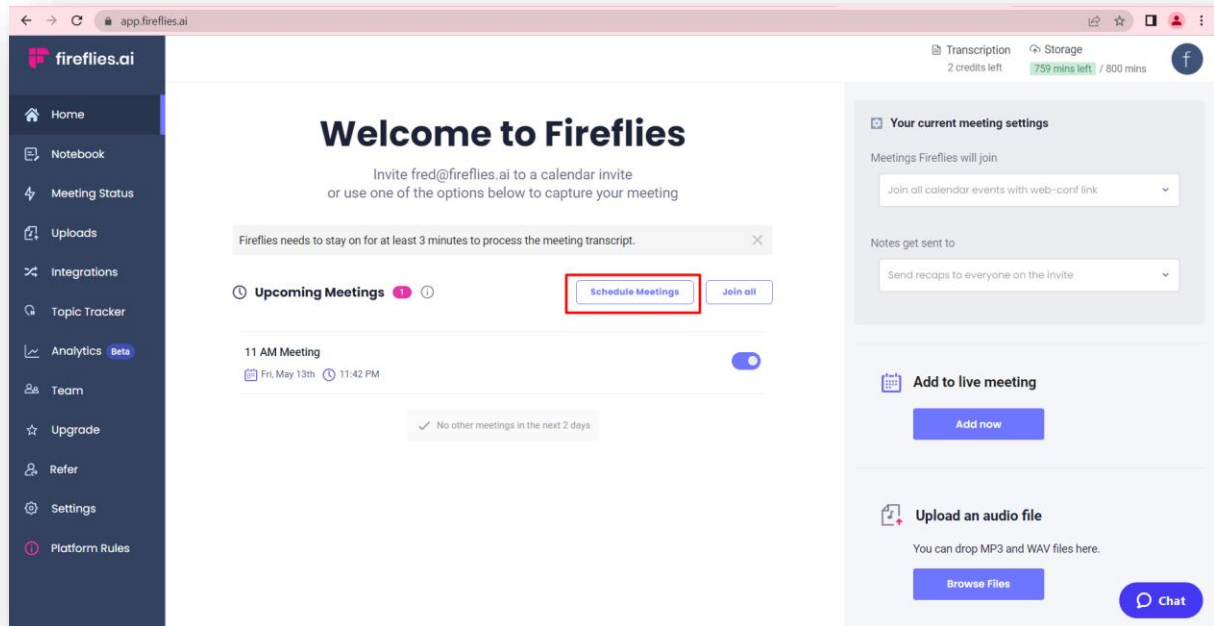


Your fireflies account will be successfully connected with Fireflies for Dynamics.

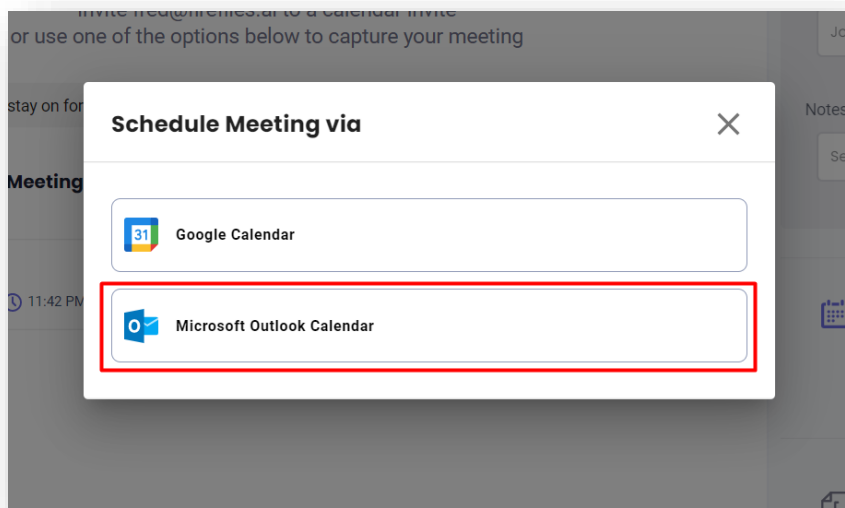
## How to Create Meetings:

To create meetings with Fireflies open your [fireflies](#) App.

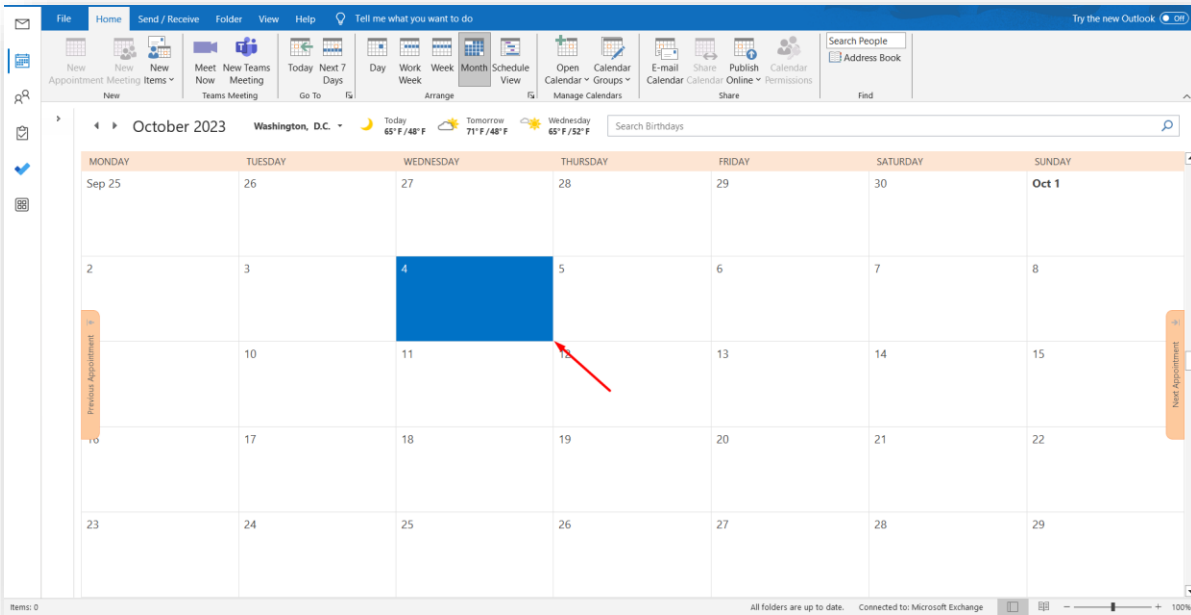
Click on **Schedule Meeting** from Home page.



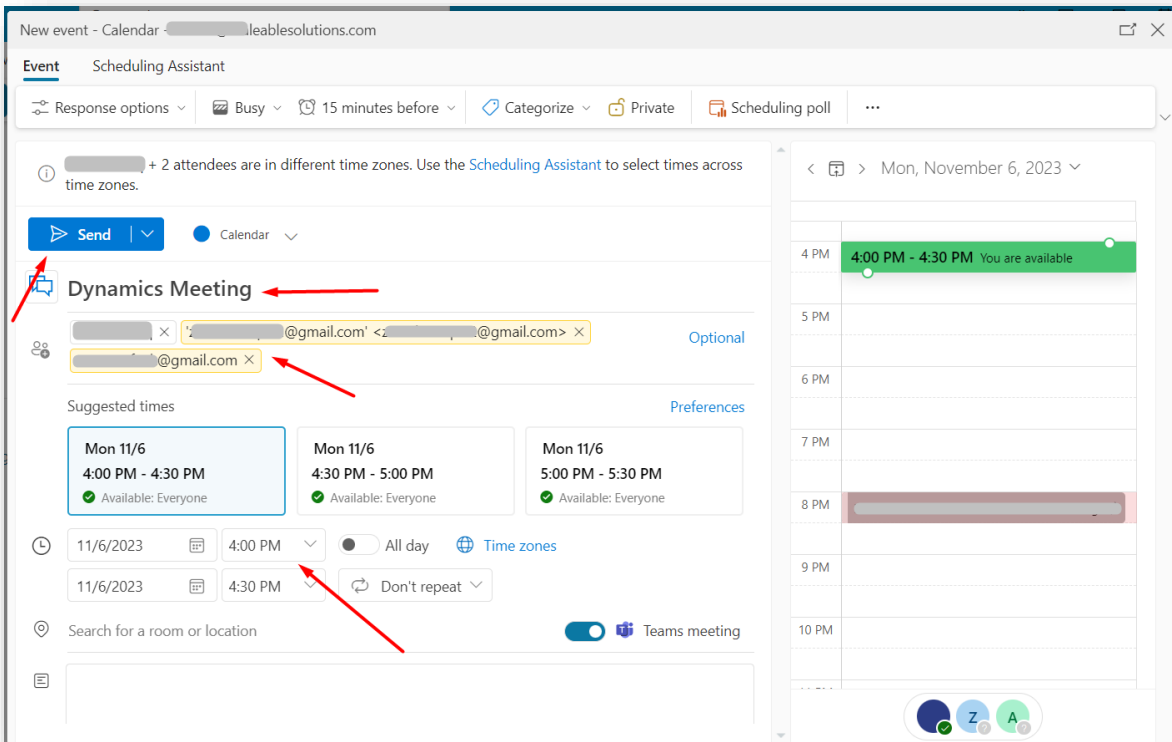
Choose the **Outlook Calendar** to schedule your meeting.



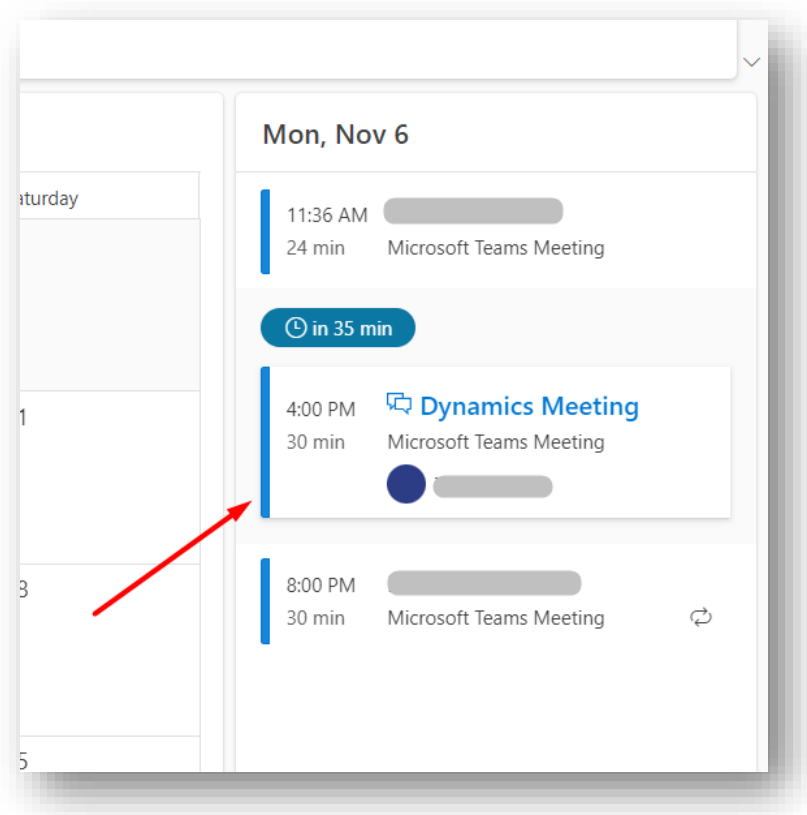
Click on the desired slot to schedule the meeting.



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



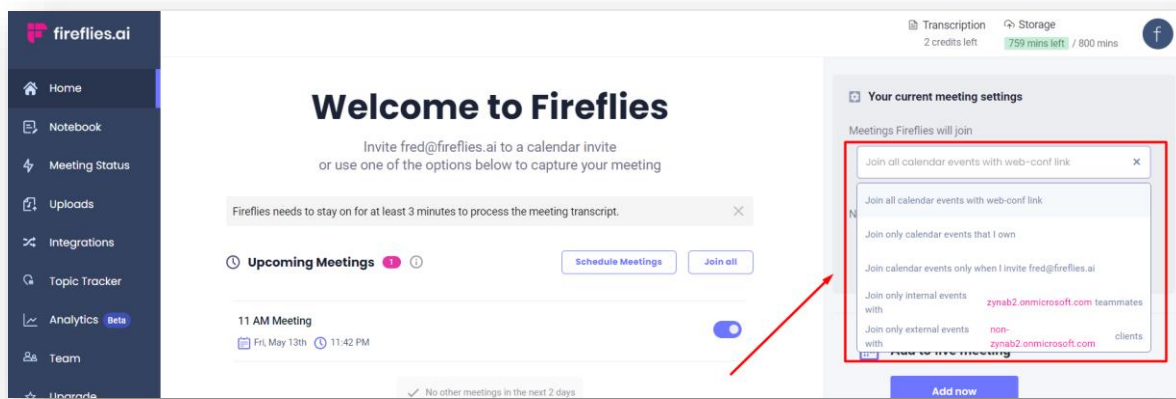
After this your meeting will be created.



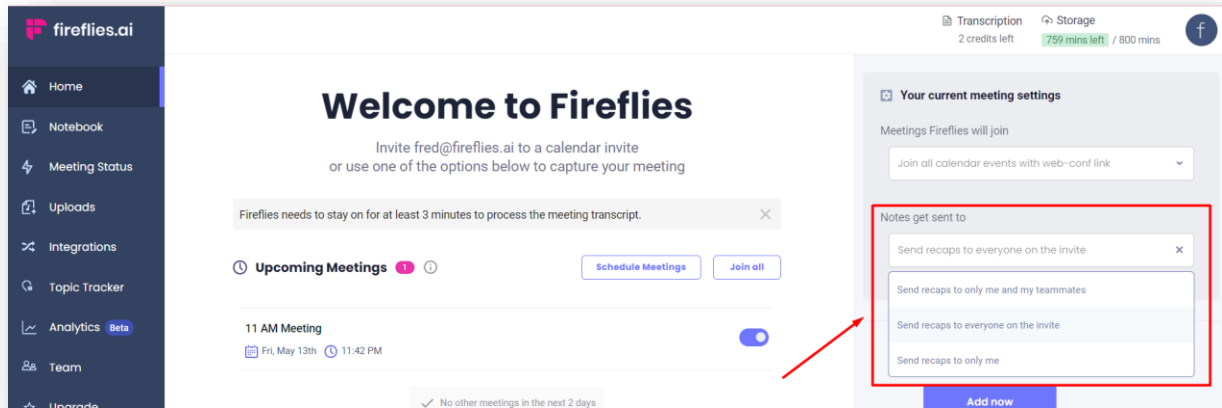
Whenever your meeting starts, **Fred** will automatically join the meeting and generate transcripts.

## Fireflies Meeting Settings:

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



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

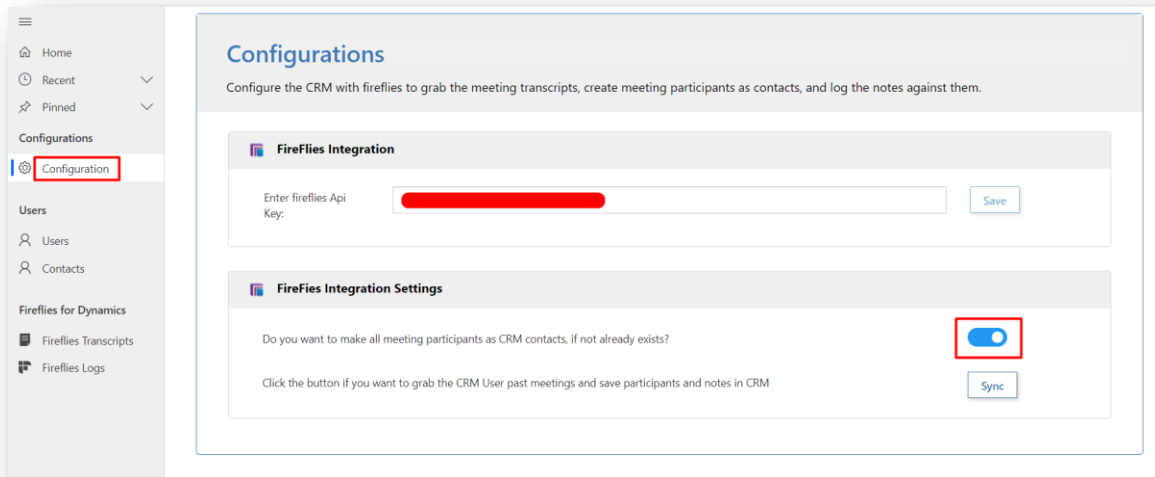


## Contacts Creation:

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

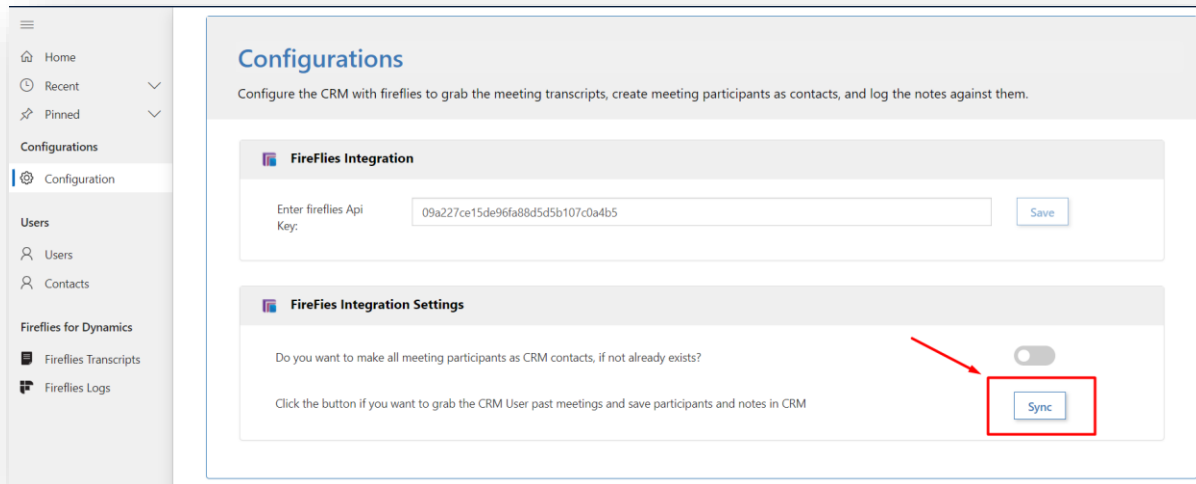
Note - Make sure that you are using either Google Or Outlook Calendar to schedule your meetings and that all your meeting participants are getting invitations to attend the meeting otherwise your meeting participants will not be added to the CRM.

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



## 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.



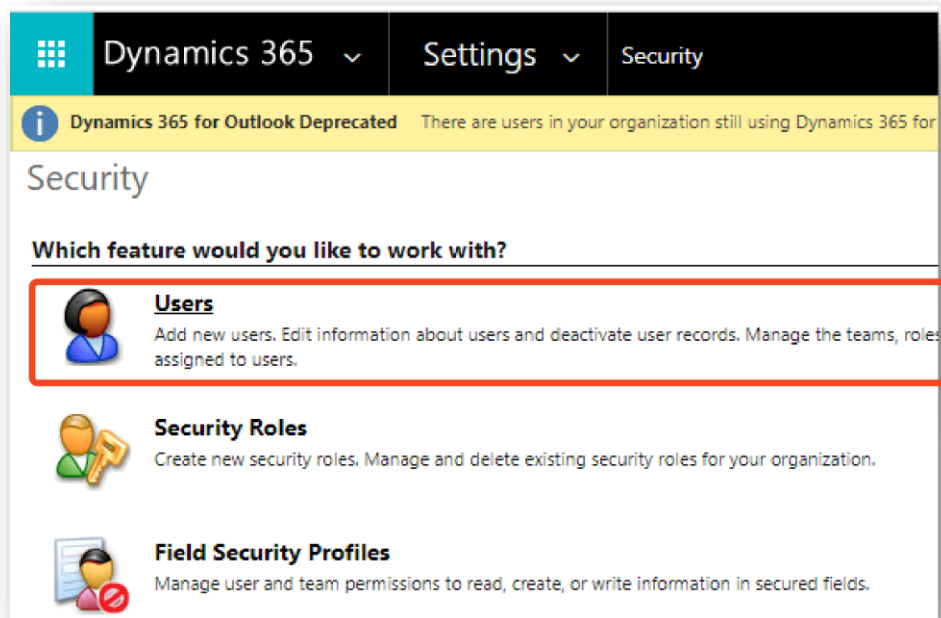
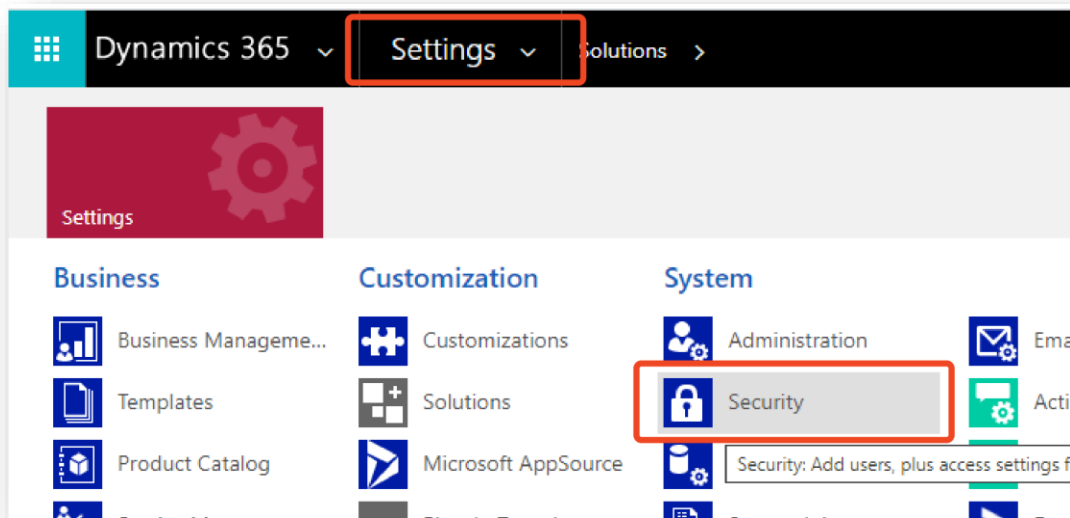
## Fireflies for Dynamics Roles:

There are three type of roles here:

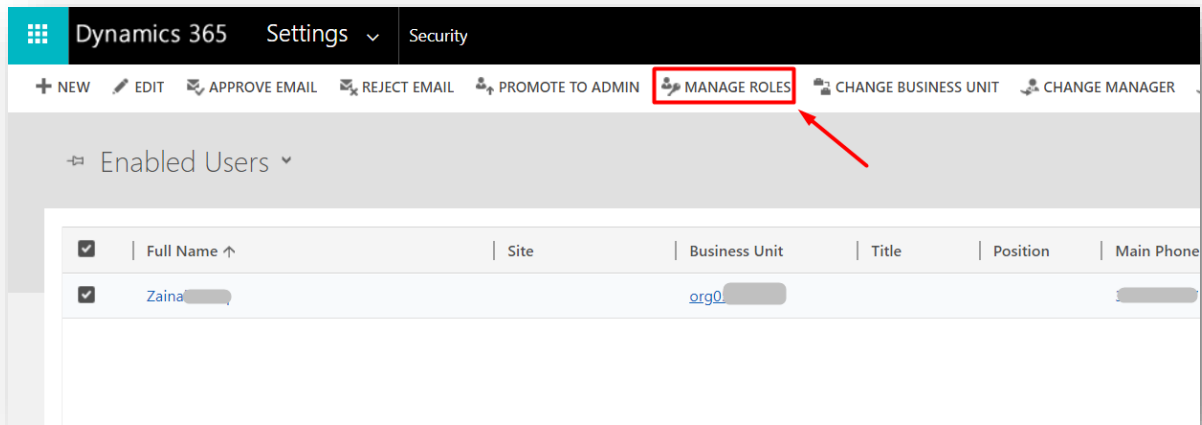
- **Fireflies for Dynamics Admin:**  
User with “Fireflies for Dynamics Admin” role will have all permissions of Fireflies for Dynamics entities.
- **Fireflies for Dynamics Read:**  
User with “Fireflies for Dynamics Read” role will only be allowed to read entities of Fireflies for Dynamics except registration.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

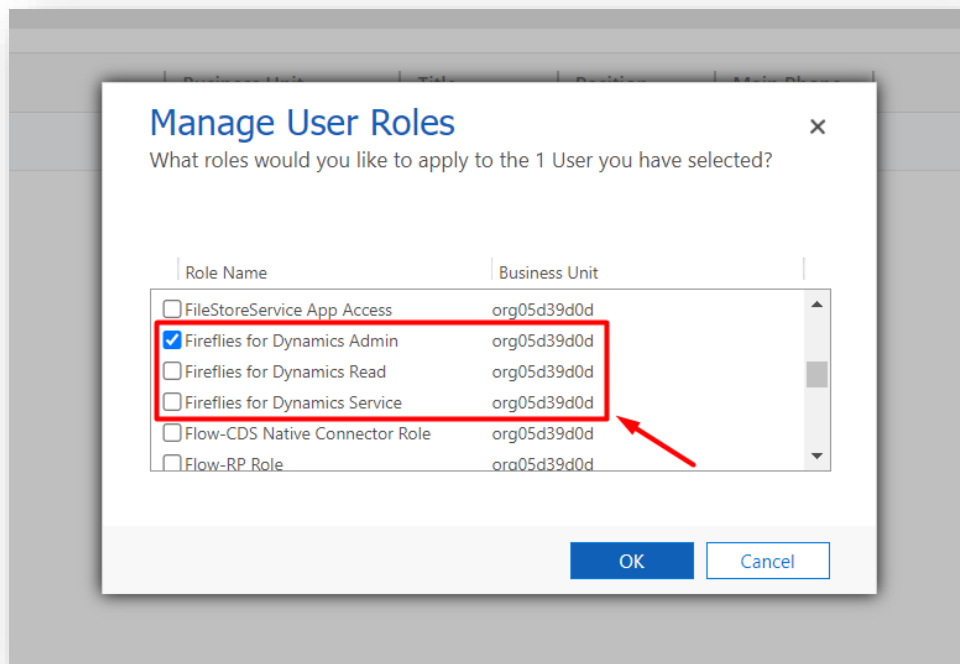
To assign roles to the users go to **Settings > Security > Users**



Select the user to assign role and click **Mange Role**.



Assign role to the user



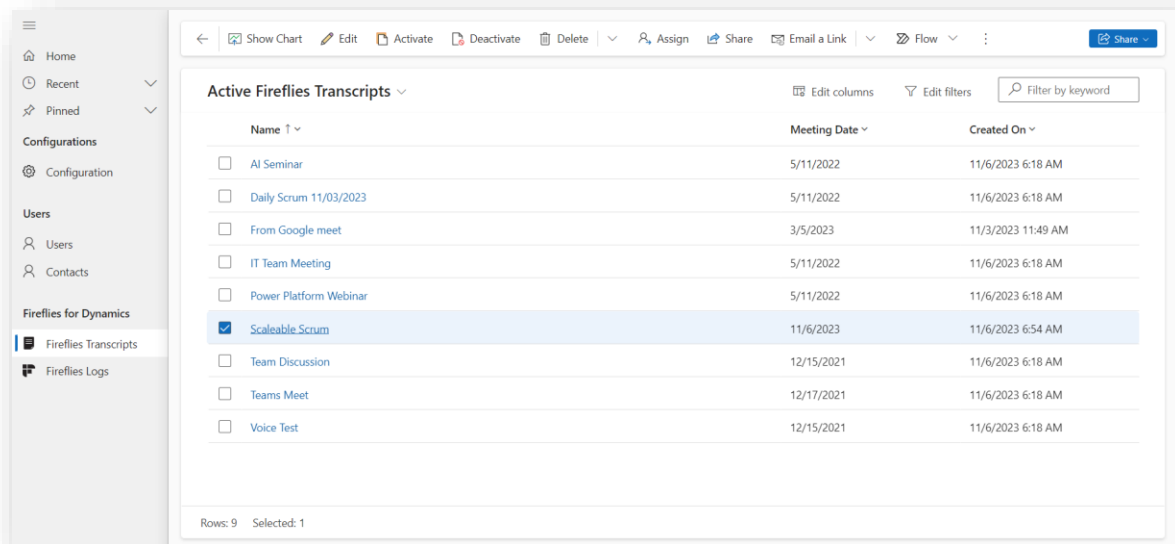
After selecting the desired role, Click on **Ok**.



## Fireflies Transcripts:

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

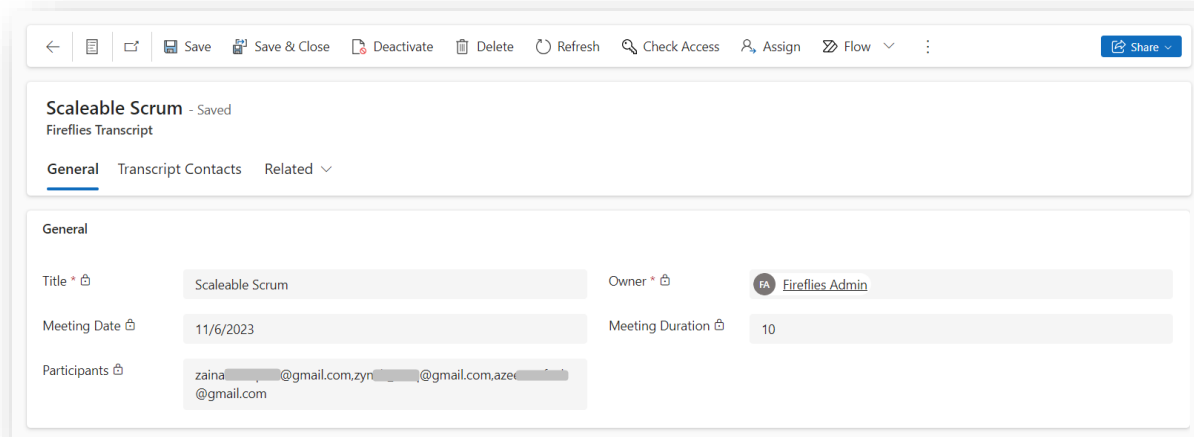
Select any meeting to open its details.



The screenshot shows a web application interface with a sidebar on the left and a main content area. The sidebar includes navigation options like Home, Recent, Pinned, Configurations, Users, and Fireflies for Dynamics. The main content area displays a table titled "Active Fireflies Transcripts". The table has three columns: "Name", "Meeting Date", and "Created On". One row, "Scaleable Scrum", is selected. Below the table, it indicates "Rows: 9 Selected: 1".

Name	Meeting Date	Created On
<input type="checkbox"/> AI Seminar	5/11/2022	11/6/2023 6:18 AM
<input type="checkbox"/> Daily Scrum 11/03/2023	5/11/2022	11/6/2023 6:18 AM
<input type="checkbox"/> From Google meet	3/5/2023	11/3/2023 11:49 AM
<input type="checkbox"/> IT Team Meeting	5/11/2022	11/6/2023 6:18 AM
<input type="checkbox"/> Power Platform Webinar	5/11/2022	11/6/2023 6:18 AM
<input checked="" type="checkbox"/> Scaleable Scrum	11/6/2023	11/6/2023 6:54 AM
<input type="checkbox"/> Team Discussion	12/15/2021	11/6/2023 6:18 AM
<input type="checkbox"/> Teams Meet	12/17/2021	11/6/2023 6:18 AM
<input type="checkbox"/> Voice Test	12/15/2021	11/6/2023 6:18 AM

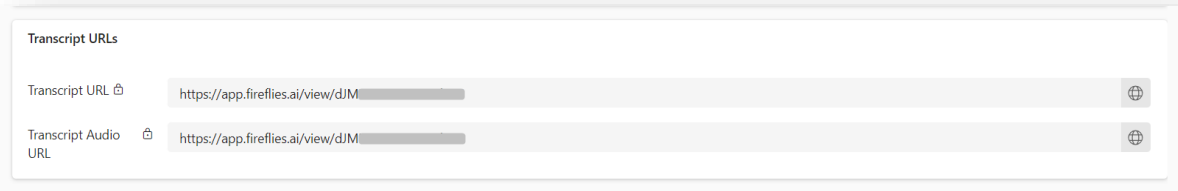
The meeting details contain Meeting **Title**, Meeting **Date**, Meeting **Duration** and Meeting **Participants**.



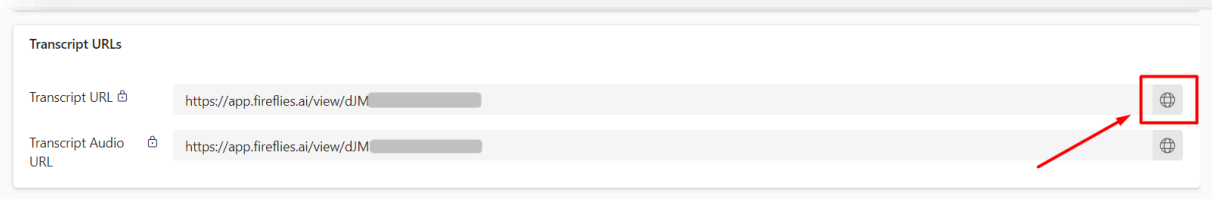
The screenshot shows the details page for a meeting titled "Scaleable Scrum". The page has a header with navigation icons and a "Share" button. Below the header, there are tabs for "General", "Transcript Contacts", and "Related". The "General" tab is active, showing fields for "Title", "Meeting Date", "Participants", "Owner", and "Meeting Duration".

Field	Value
Title	Scaleable Scrum
Meeting Date	11/6/2023
Participants	zaina...@gmail.com, zyn...@gmail.com, aze...@gmail.com
Owner	Fireflies Admin
Meeting Duration	10

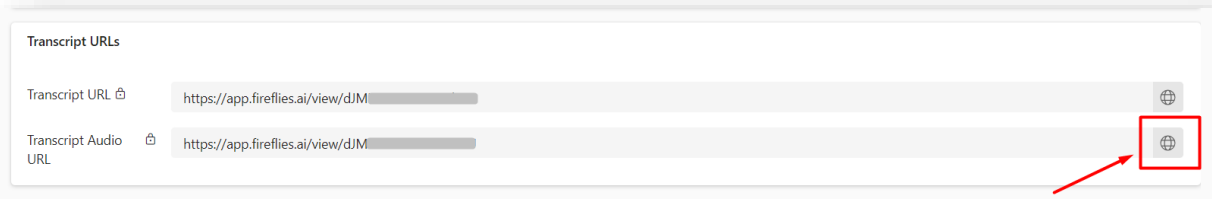
It also contain links to access transcript and audio of the meeting.



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



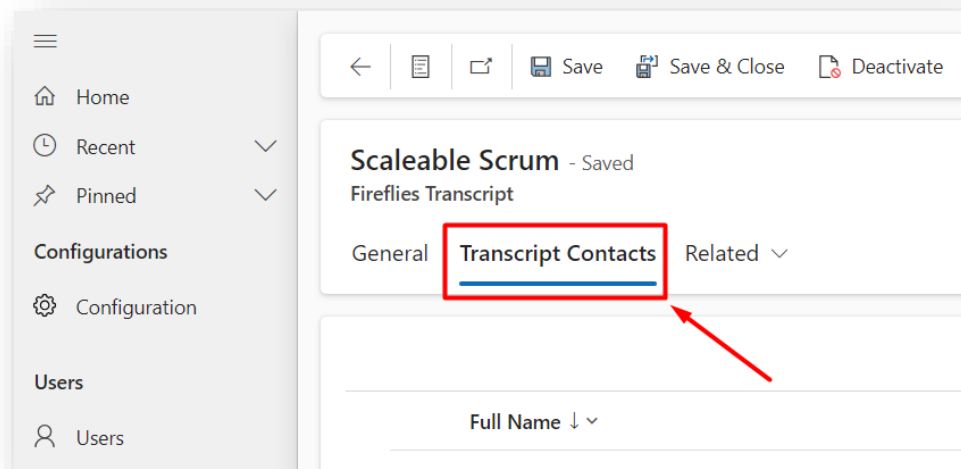
Click on the browser icon next to the **Transcript Audio URL** link to access the meeting audio.



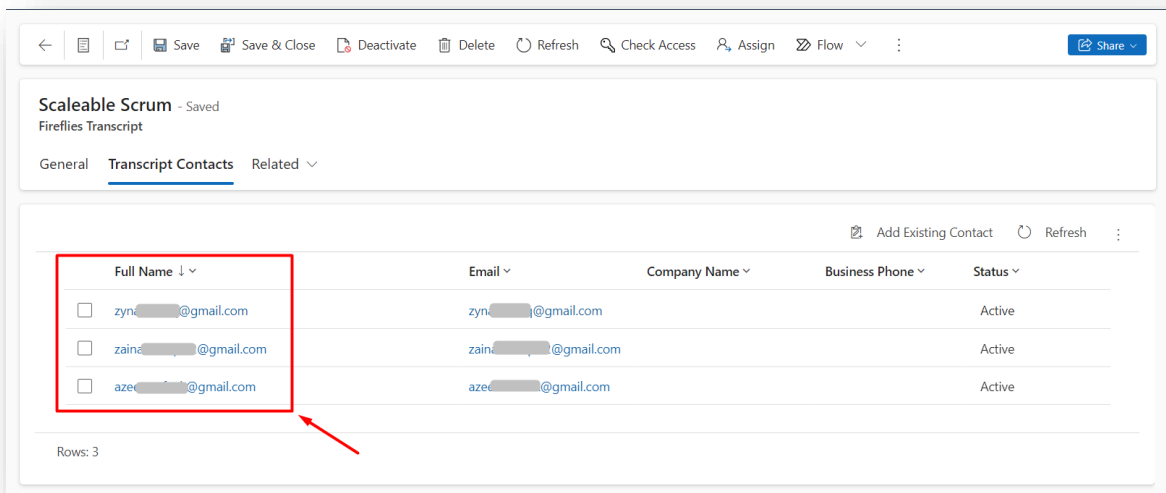
## Transcript Contacts:

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

Move to the **Transcript Contacts** tab.

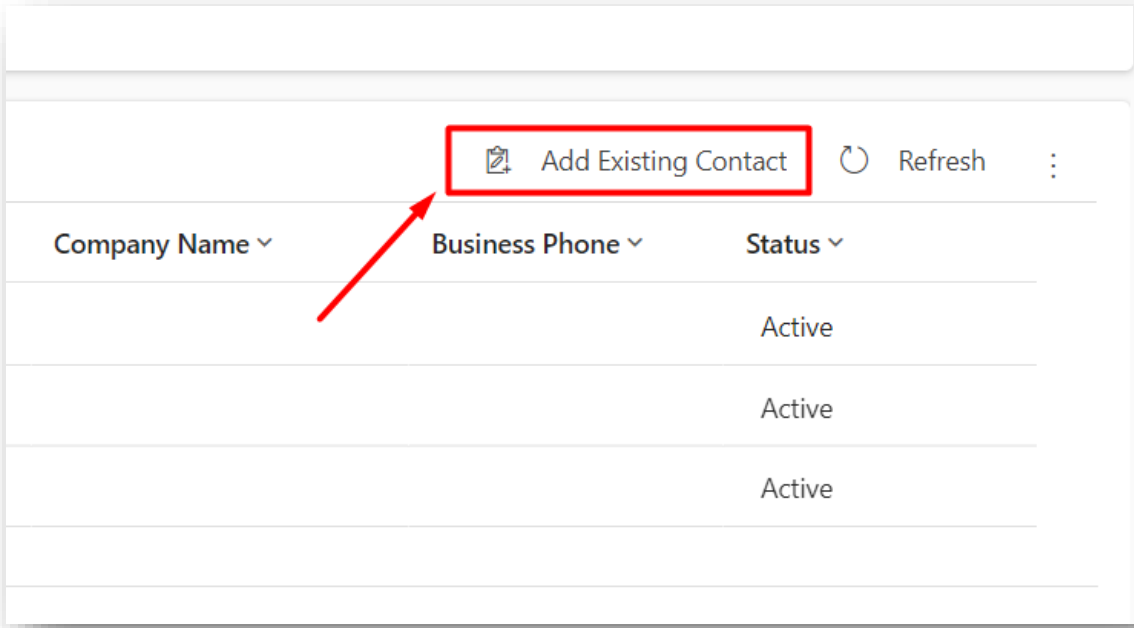


All your meeting participants will be displayed here.

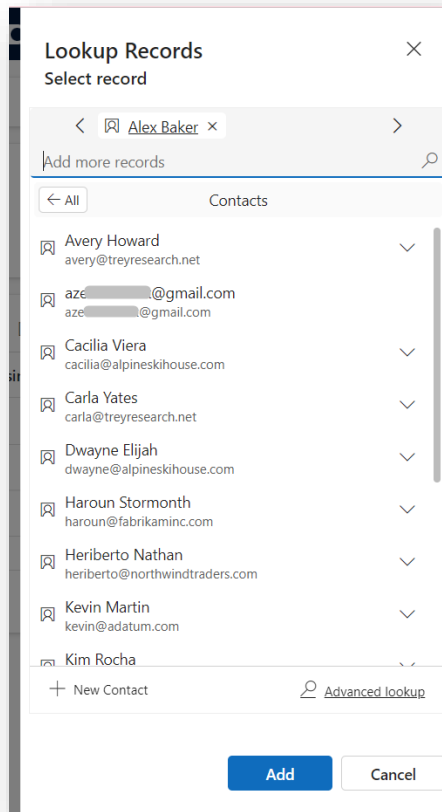


You can also add existing contacts to the list.

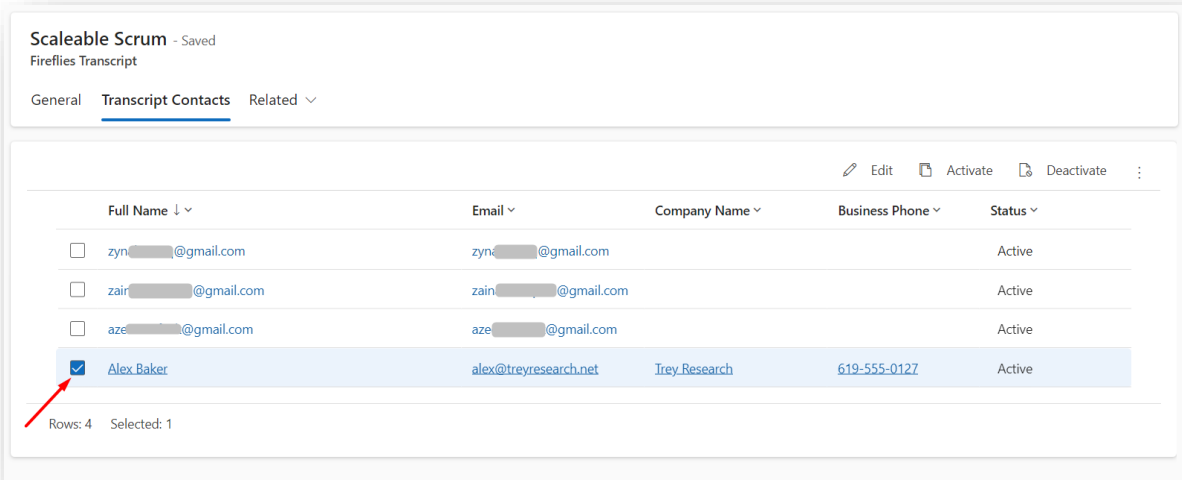
For this, click on **Add Existing Contact**.



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



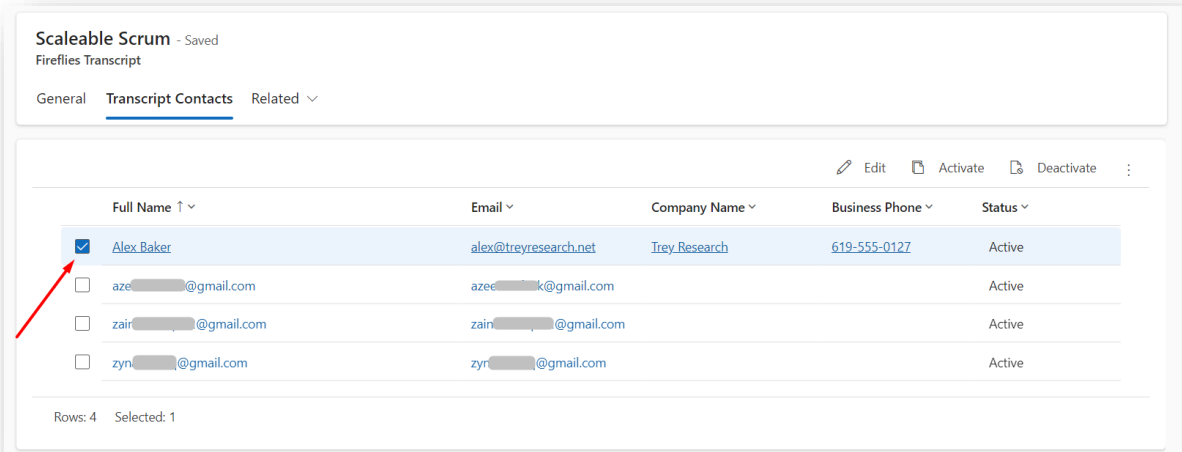
The selected contact will be added to the list.



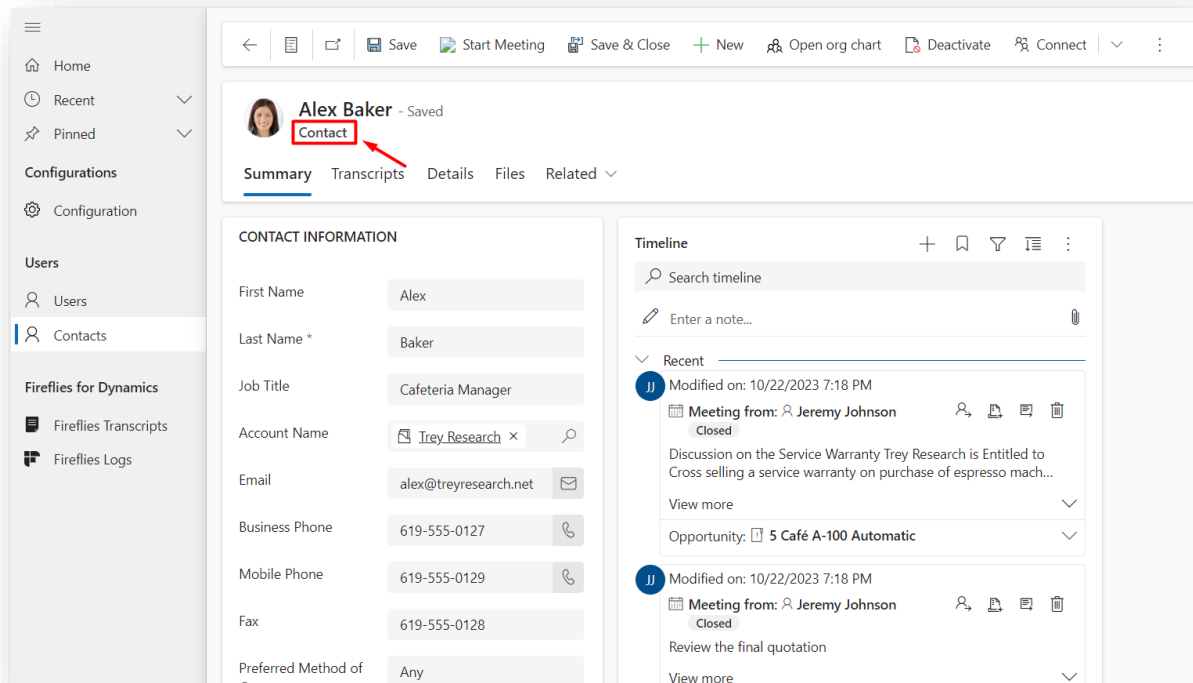
All the Non-Existing contacts from meeting participants will be created in Dynamics contacts.

Open the contact to see the related transcripts.

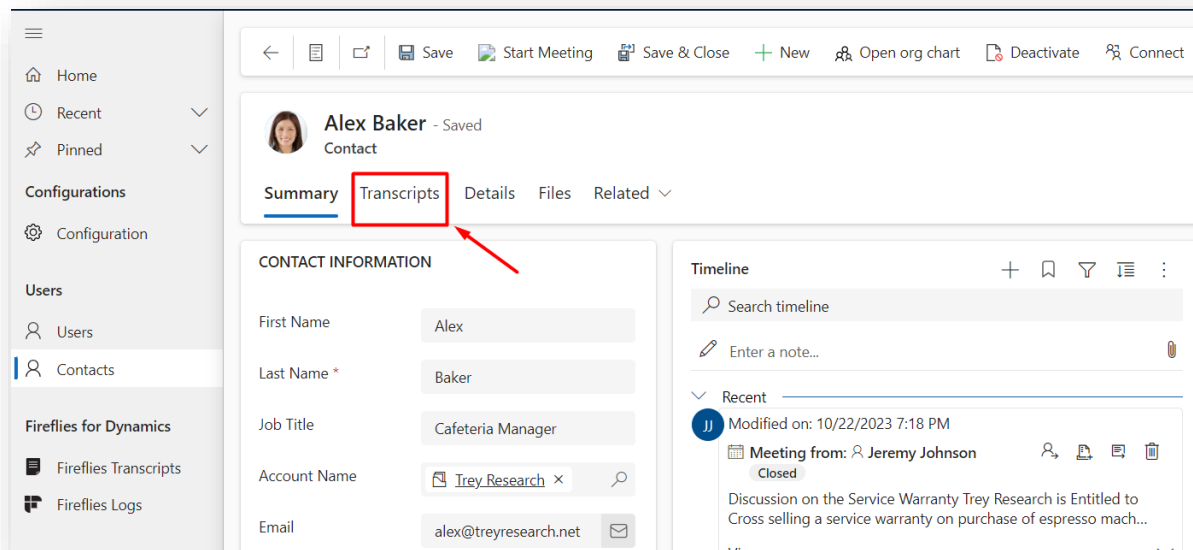
For this, click on any of the **Transcript Contacts**.



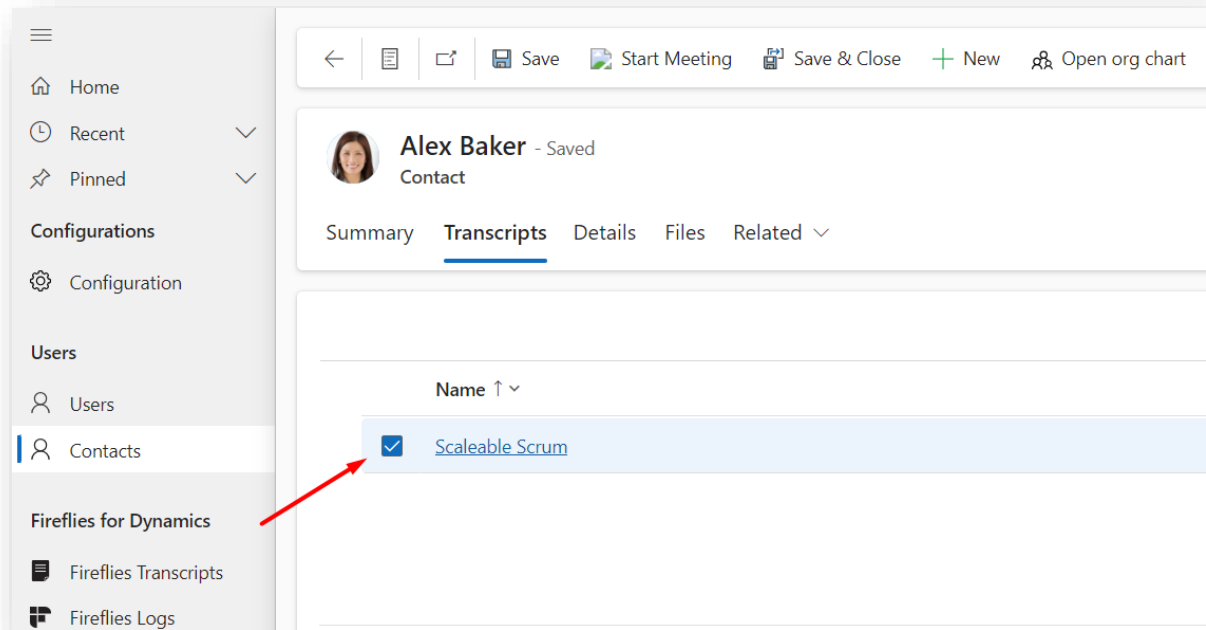
The contact record will be opened.



Now move to the Transcripts tab.

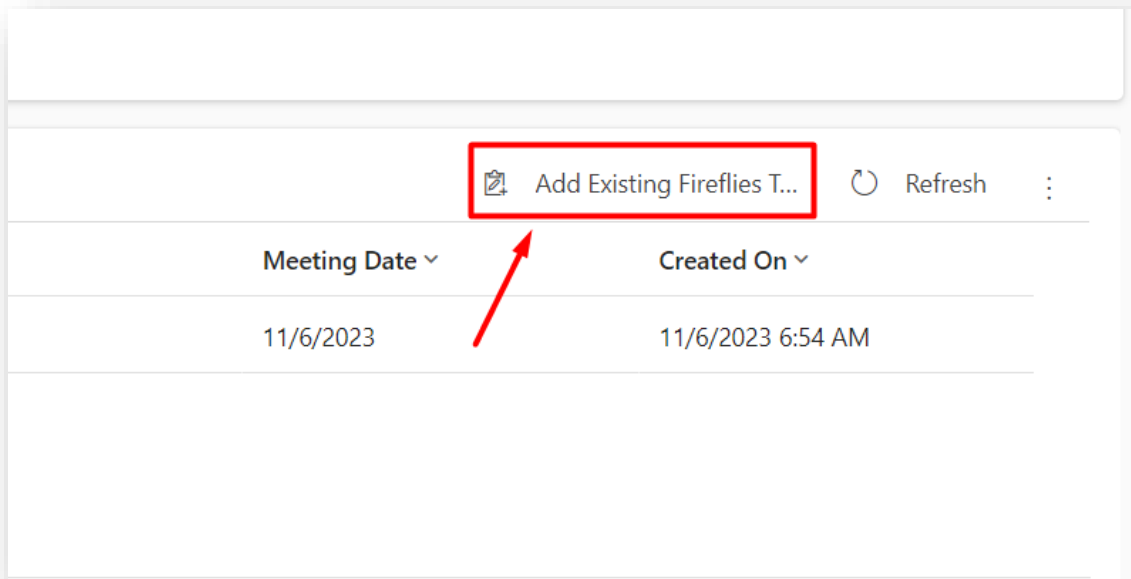


All the related transcripts for which the contact is the participant of, will be displayed here.

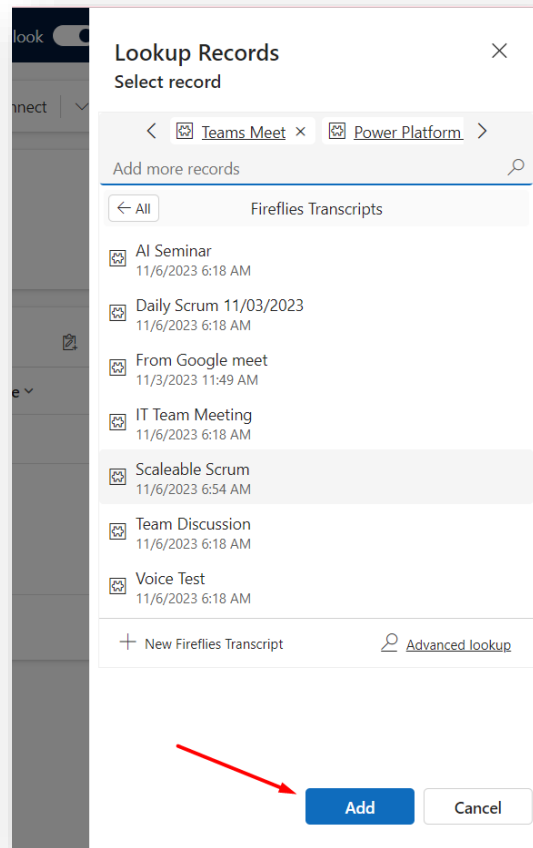


You can also add the Existing Transcripts in the list.

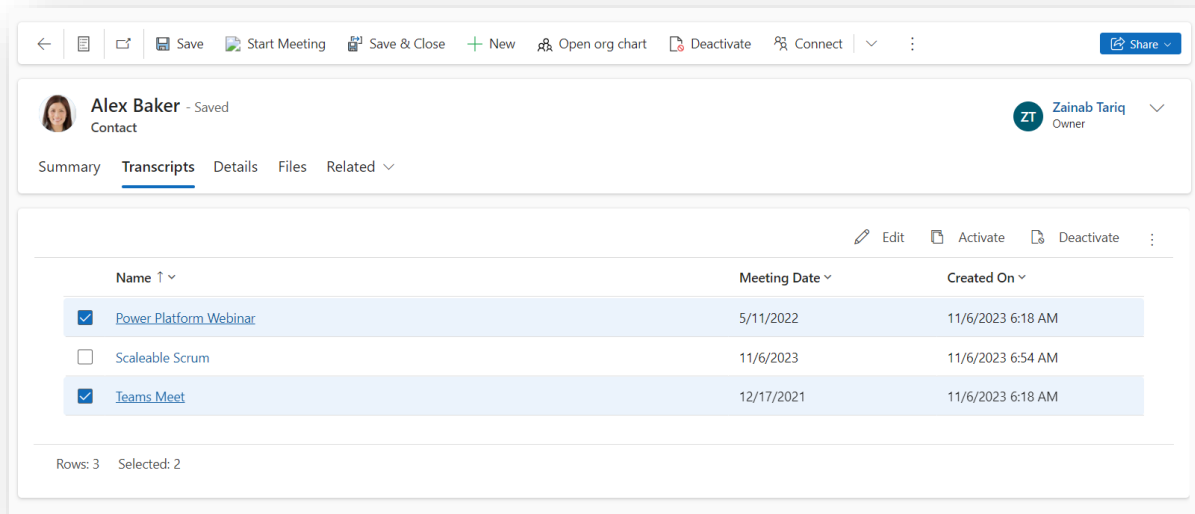
For this, Click on **Add Existing Fireflies Transcript**.



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.

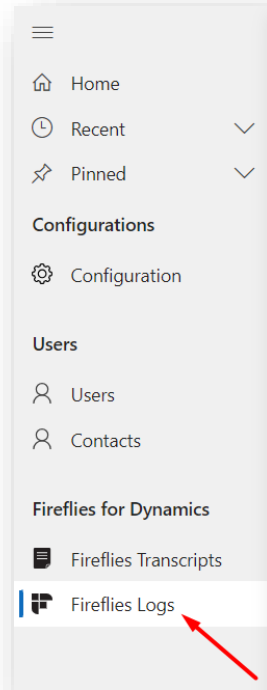




## Fireflies logs:

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**.

