



# intelli-CTi™ for Microsoft Dynamics CRM

QGate provides support for Microsoft's Unified Service Desk with intelli-CTi for Microsoft Dynamics CRM v1.6.

"I would recommend QGate and intelli-CTi to anyone looking for an easy, flexible CTi solution that can work with the telephone system you have in place.

On average it can reduce the call popup or the average hunting time by 15%."

- **Marco Amoedo, Senior Solutions Architect, Metro Bank**

## KEY FEATURES:

- > CRM inbound call recognition and telephone call manager
- > Telephone call manager and intelli-CTi screen pop inside USD
- > Contact dialing from within CRM via the Dynamics CRM dialer

## QGATE PROVIDES SUPPORT FOR MICROSOFT'S UNIFIED SERVICE DESK WITH INTELLI-CTI FOR MICROSOFT DYNAMICS CRM V1.6

As part of the Leo Spring 2014 release, Microsoft has focused on the area of customer service. Microsoft has made available a new module called the Unified Service Desk (USD) and aimed it at the larger call centre, customer service operations

### Where did USD come from?

Unified Service Desk is built using the User Interface Integration framework and was designed as a series of adapters and modules that facilitate management of CRM UI elements (pages, dialogs), automatic loading of related records, agent scripting, a configurable toolbar and more. USD can be configured and administered using Microsoft Dynamics CRM or Microsoft Dynamics CRM for Outlook.

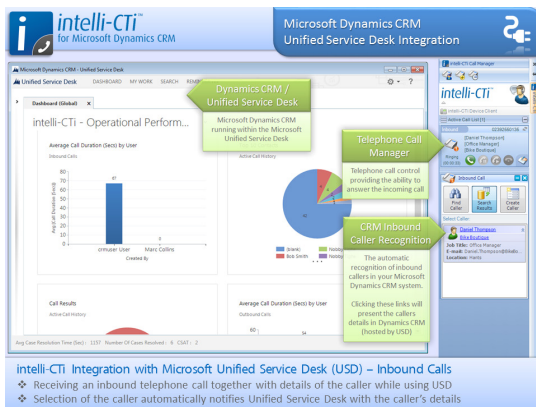
**Using intelli-CTi with USD means your organisation will be able to use a single technology for both the USD users and those CRM users that need a 'standard' CTi capability.**

**To see this in action, watch our video on intelli-CTi and USD.**

### Why would you need USD?

- You have a call centre operation and you need to provide your agents with one screen giving them access to all the key information they need to manage their calls
- Your agents need to manage multiple calls or sessions
- Your primary system is CRM, but you need to surface various CRM elements at once
- You need to provide access to data from other systems without switching applications
- You need to run some form of script to prompt or guide agents through a call

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## INTELLI-CTI AND USD: INBOUND CALLS

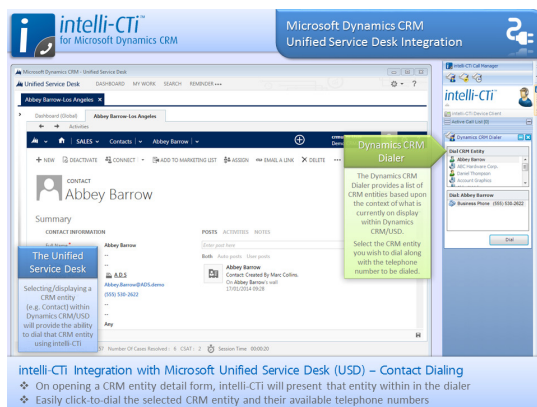
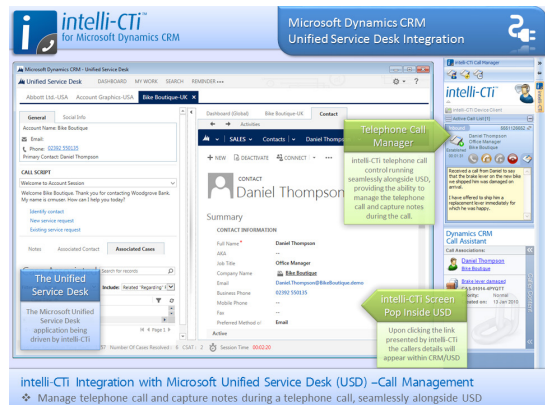
intelli-CTi's telephony call control provides the ability to answer incoming calls while Microsoft Dynamics CRM runs within the Microsoft Unified Service Desk.

intelli-CTi automatically recognises inbound callers in your Microsoft Dynamics CRM system. Clicking the links provided by intelli-CTi will present the caller's details in Dynamics CRM (hosted by USD).

## INTELLI-CTI AND USD: CALL MANAGEMENT

The Microsoft Unified Service Desk application can be driven by intelli-CTi. intelli-CTi telephone call control runs seamlessly alongside USD, providing the ability to manage a telephone call and capture notes during the call.

Upon clicking the link provided by intelli-CTi the caller's details will appear within CRM/USD.



## INTELLI-CTI AND USD: CONTACT DIALING

Selecting or displaying a CRM entity (e.g. Contact) within Dynamics CRM/USD provides the ability to dial that CRM entity using intelli-CTi.

The Dynamics CRM Dialer provides a list of CRM entities based on the context of what is currently displayed within Dynamics CRM/USD. Users can select the CRM entity they wish to call as well as the telephone number they wish to dial from within this list.

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