



# intelli-CTi™ for Microsoft Dynamics 365

Engineered by QGate

## Benefits

- Streamlined telephony activity within your business
- Improved customer relationships, service levels and customer satisfaction
- Increased phone call efficiency and throughput
- Personalized telephone interaction, identifying CRM callers automatically
- Seamlessly leverage the power of CRM relationships with minimal effort
- Increased business productivity and ease of use
- No development costs with ease of deployment and implementation
- Flexible deployment capabilities across multiple sites and large scale implementations
- Subscription based licensing - per user per month
- Flexible pricing model allows a mix of concurrent and named users, for an optimized investment

## intelli-CTi™ CONNECTS MICROSOFT DYNAMICS 365 WITH YOUR PHONE SYSTEM

**Are you still manually dialing telephone numbers, looking up Contacts and capturing telephone call information by hand?**

intelli-CTi for Microsoft Dynamics 365 instantly improves the effectiveness of your customer interaction and the productivity of your CRM users.

intelli-CTi provides the ability to manage the entire call flow process while freely interacting with Microsoft Dynamics 365. intelli-CTi provides assistance throughout the telephone life cycle with easy interaction with CRM (with the aid of our Dynamics 365/CRM Call Assistant), note capture capability, concluding with a complete post call wrap-up.



## intelli-CTi™ for Microsoft Dynamics 365 contributes to profitability and customer retention through increased productivity and customer satisfaction

Whether building solutions for sales, call centers, support desks or customer service, intelli-CTi together with Microsoft Dynamics 365, will increase the productivity and efficiency of your operation while enhancing customer satisfaction and bottom line profitability.

**Reduce time per call:** less clicks and immediate access to all the relevant information mean less time spent on each call, and therefore an increase in agents' productivity, with teams doing more work in the same amount of time. intelli-CTi also makes it easier for agents to input information in the system, continuously adding value to existing data.

**Improve customer experience:** providing agents with the relevant information reduces repetitive calls and questions, and avoids time wasting. Overall it shows that your teams know their customers and care about them, improving their experience and increasing both the conversion and the retention rates.

# intelli-CTi™ for Microsoft Dynamics 365



Access relevant information, add new information and wrap-up the call, all from one screen

## Leverage your previous investments and your existing data

intelli-CTi significantly enhances the power of Microsoft Dynamics 365, allowing your teams to use the information it holds as an effective business tool with measurable outcomes.

### Out of the box and customizable

intelli-CTi works out of the box with Microsoft Dynamics 365, but you can customize it further to meet your business needs.

### Connect to your existing phone system

Connect seamlessly to 60+ phone systems through intelli-CTi's support for standard telephony interfaces. Supports Skype for Business. Supports Microsoft Unified Service Desk.

### Streamlines telephony activity

Use the Dynamics 365 Call Assistant to provide the call flow process with rich detailed CRM information. Manage post call operations in CRM such as note taking, Activity management, Case management and/or Opportunity management.

### Quality call data collection

Manage complex CRM entity relationships to ensure the capture of quality data. Automatically log telephone call statistics with associated customer data to enable valuable analysis and business intelligence.

### Always follow-up

Log the information while on the call, and ensure that Tasks, Cases, Opportunities and Activities related to that phone call are set to the right person at the right time. Avoid opportunities falling through the cracks or customer queries going unanswered.

### Keep adding value to your data

Give users the power to keep the system updated in a simple and fast way, enriching it with new information every day, and with no additional effort.

## Key features

- Seamless integration with Microsoft Dynamics 365/CRM
- Incoming caller recognition (screen-pop) displaying customer information from Microsoft Dynamics 365
- Seamless Association between Contact and Call - manual and automatic, with the ability to Reassociate if needed
- Outbound dialing support to relevant CRM related entities (click-to-dial)
- Call history is automatically reflected in Microsoft Dynamics 365
- In-call note capture capability minimizes information loss
- Create Cases and Opportunities with a few clicks
- Configure the Call Assistant to interact with other entities
- Valuable statistics / reports
- Post call wrap-up feature simplifies follow up activities
- Compatible with 60+ telephone systems including hosted - Skype for Business and Broadworks
- Support for Microsoft Unified Service Desk
- Citrix/Terminal Server support

## Free Trial

Request a fully supported free trial, with zero commitment, at:

[www.intellicti.com](http://www.intellicti.com)