



*intelli-CTi*<sup>TM</sup>  
for Microsoft Dynamics 365  
Product Tour



The screenshot displays the Microsoft Dynamics 365 interface for a contact named Daniel Thompson. The contact's details, including job title (Office Manager), account name (Bike Boutique), and phone numbers, are visible. A green arrow points to this section with the text 'CRM Contact Information' and 'Show the CRM Contact information of the caller in your Microsoft Dynamics 365'. To the right, the 'intelli-CTi Call Manager' overlay is shown, displaying an 'Active Call List' with an incoming call from Daniel Thompson. A green arrow points to this overlay with the text 'Telephone Call Manager' and 'Telephone call control providing the ability to answer the incoming call'. Below the call list, the 'Inbound Call' section shows a 'Select Caller' dropdown with Daniel Thompson selected. A green arrow points to this section with the text 'CRM Inbound Caller Recognition' and 'The automatic recognition of inbound callers in your Microsoft Dynamics 365 system'.

## intelli-CTi Inbound Caller Recognition

- ❖ Receiving an inbound telephone call together with details of the caller from Dynamics 365
- ❖ On-screen call handling capability
- ❖ Selection of the caller automatically presenting their details within Dynamics CRM



**CRM Contact List Dialing**

Selecting a CRM entity (e.g. CRM Contact) from a list within Dynamics 365 will place the selected entity into the Dynamics 365 Dialer, whereby this entity can then be dialed.

**Dynamics 365 Dialer**

The Dynamics 365 Dialer provides a list of CRM entities based upon the context of what is currently selected in Dynamics 365.

Select the CRM entity you wish to dial along with the telephone number to be dialed.

Full Name	Email	Company Name	Business Phone
Daniel O'Brien		First Printing	
Daniel Owen	Daniel@RVICompany...	RVI Company	(415) 555-1234
Daniel Ptakowski	Daniel@JudicialUniver...	Judicial University	(561) 555-1234
Daniel Thompson	someone@example.c...	Bike Boutique	(555) 321-1234
Daniel White	Daniel@MarshCompa...	Marsh Company	0132955-1234
Danielle Greth	Danielle.Greth@MGKC...	MGK Consulting	(01703) 2-1234
Danni Vebeliunas	Danni.Vebeliunas@M...	M.G.K	(01703) 5-1234
Danni Vebeliunas	Danni.Vebeliunas@M...	MGK	(01703) 2-1234
Danny Brocket		A.B.C.	
Daphney Elkins	Daphney@Timelmpor...	Time Imports	(615) 555-1234
Darin Hastings	Darin@HartiganEnter...	Hartigan Enterprises	(503) 555-0055
Darrel Getz	Darrel@GatzkeNation...	Gatzke National Assoc...	(210) 555-3414

## intelli-CTi Preview (Outbound) Dialing (e.g. Dialing a CRM Contact)

- ❖ Select the CRM entity you wish to dial from the list within Dynamics 365 presents them in the dialer
- ❖ Easily click-to-dial the selected CRM entity and their available telephone numbers
- ❖ This light touch approach ensures ease of dialing from anywhere within Dynamics 365



Dynamics 365 Sales Contacts Daniel Thompson

CONTACT Daniel Thompson

**Summary**

CONTACT INFORMATION	
Full Name *	Daniel Thompson
Job Title	Office Manager
Account Name	Bike Boutique
Email	someone@example.c
Business Phone	(555) 321-1234
Mobile Phone	(555) 112-6652
Fax	--
Preferred Method of Contact	Any
Address	2601 Cambridge Drive Snohomish, WA

Active

### CRM Contact Entity Dialing

Displaying a CRM entity (e.g. CRM Contact) within Dynamics 365 will place the displayed entity into the Dynamics 365 Dialer, whereby this entity can then be dialed.

### Dynamics 365 Dialer

The Dynamics 365 Dialer provides a list of CRM entities based upon the context of what is currently selected in Dynamics 365.

Select the CRM entity you wish to dial along with the telephone number to be dialed.

intelli-CTi Call Manager

Virtual Telephony Server (VTS) (1234)

Active Call List [0]

**Dynamics CRM Dialer**

**Dial CRM Entity**

- Daniel Thompson
- Walter Schimmel
- Madoka Ledbetter
- A. Griffin

**Dial: Daniel Thompson**

- Business Phone (555) 321-1234
- Mobile Phone (555) 112-6652

Dial

## intelli-CTi Preview (Outbound) Dialing (e.g. Dialing a CRM Contact)

- ❖ When operating from a CRM entity detail form, intelli-CTi will present that entity within in the dialer
- ❖ Easily click-to-dial the selected CRM entity and their available telephone numbers
- ❖ This light touch approach ensures ease of dialing from anywhere within Dynamics 365



**Dynamics 365** Service Cases > Brake Lever damaged

SAVE & ROUTE NEW CREATE CHILD CASE RESOLVE CASE CANCEL CASE ADD TO QUEUE QUEUE ITEM DETAILS

**CASE**  
Brake Lever damaged

Priority: Normal Created: 7/12/2018

**Identify (Active for 1 minute)**

- Find Customer: Daniel Thompson (click to enter)
- Find Case: Brake Lever damaged

**Summary**

**CASE DETAILS**

Case Title *	Brake Lever damaged
ID	CAS-00113-T5L8Y6
Subject	--
Customer *	Daniel Thompson

Active

POST

All posts Auto posts User posts

### CRM Entity Related Dialing

It is possible to make telephone calls from related CRM entities such as CRM Cases and CRM Opportunities, by calling from the entity's respective detail display within Microsoft Dynamics 365.

The CRM Account/Contact relating to the entity will appear in the Dynamics 365 Dialer, ready to be dialed.

This approach applies to both CRM Cases and CRM Opportunities.

### Dynamics 365 Dialer

The Dynamics 365 Dialer provides a list of CRM entities based upon the context of what is currently selected in Dynamics 365.

Select the CRM entity you wish to dial along with the telephone number to be dialed.

intelli-CTi Call Manager

Virtual Telephony Server (VTS) (1234)

Active Call List [0]

**Dynamics CRM Dialer**

**Dial CRM Entity**

- Daniel Thompson
- Walter Schimmel
- Madoka Ledbetter
- A. Griffin

**Dial: Daniel Thompson**

- Business Phone (555) 321-1234
- Mobile Phone (555) 112-6652

Dial

### Automatic Call Association

When dialing from a related CRM entity (e.g. CRM Case), the related entity automatically becomes associated to the telephone call.

### intelli-CTi Preview (Outbound) Dialing (e.g. Dialing a CRM Contact)

- ❖ Operating from related CRM entities such as Cases, intelli-CTi will ascertain the related Contact to dial
- ❖ Dialing a Contact from a related entity such as a Case will automatically associate the Case to the call
- ❖ All calls related to CRM Cases or Opportunities are automatically logged against them



The screenshot displays the Dynamics 365 interface with a contact record for Daniel Thompson. The contact information is shown in a table format:

CONTACT INFORMATION	
Full Name *	Daniel Thompson
Job Title	Office Manager
Account Name	Bike Boutique
Email	someone@example.c
Business Phone	(555) 321-1234
Mobile Phone	(555) 112-6652
Fax	--
Preferred Method of Contact	Any
Address	2601 Cambridge Drive Snohomish, WA

The sidebar on the right contains the following sections:

- intelli-CTi Call Manager**: Includes a Virtual Telephony Server (VTS) (1234) and an Active Call List [1].
- Call Assistant**: Shows call associations for Daniel Thompson at Bike Boutique, including a note about a damaged brake lever.

Three green callouts highlight key features:

- CRM Contact Information**: Show the CRM Contact information of the caller in your Microsoft Dynamics 365
- Telephone Call Manager**: Telephone call control providing the ability to manage the telephone call and capture notes during the call.
- Dynamics 365 Call Assistant**: In-Call assistant providing ready access to call related aspects of Dynamics 365. Manage and associate CRM entities to the call.

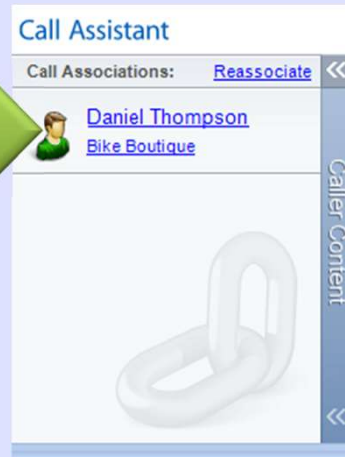
### intelli-CTi In-Call Contact Management (Dynamics 365 Call Assistant)

- ❖ Complete in-call management and call handling with association to CRM through the CRM Call Assistant
- ❖ In-call notepad capability (notes captured during a telephone call automatically logged in call history)
- ❖ Unique desktop sidebar enables total freedom to access Dynamics 365 throughout the entire call



### Call Assistant (initial view)

The initial view of the Call Assistant shows the call associations to the current call/caller (e.g. CRM Contact)

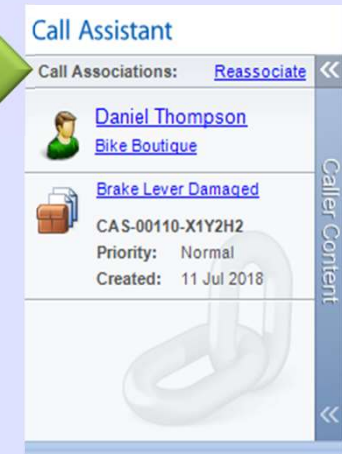


### Caller Content

Clicking the "Caller Content" bar will switch the view of the Call Assistant to show/access more CRM content.

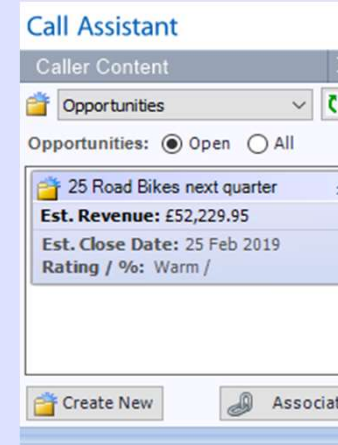
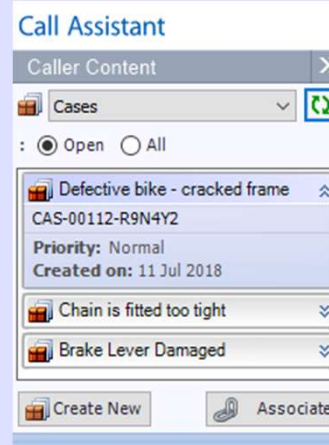
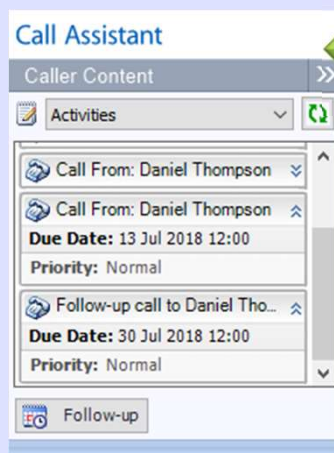
### Call Assistant (Association view)

Once CRM content such as CRM Cases and/or CRM Opportunities have been associated to the call, these are then displayed in the Call Associations Section.



### Call Assistant "Activity View"

Selecting the Activity view within the Call Assistant provides a list of open Activities for the related caller. Each activity can be selected and shown in Dynamics 365



### Call Assistant "Caller Content"

The Call Assistant provides access to additional CRM information such as CRM Cases and Opportunities. Content can be selected, created and associated to the current call.

## intelli-CTi – Microsoft Dynamics 365 Call Assistant

- ❖ Unique CRM call assistance capability to assist Dynamics 365 throughout the life of a telephone call
- ❖ Manage and administer all call related CRM entities from a single consistent control point
- ❖ Bring together all call related elements of CRM into one concise management summary



### Dynamics 365 Call Wrap-up

The initial view of the Call Assistant shows the call associations to the current call/caller (e.g. CRM Contact)

### Telephone Call Manager

Showing a summary of the telephone call that has now ended

### CRM Activity Management

Each telephone call is automatically related to CRM Activity/History (Phone Call).

Notes taken during the call are featured here and can be updated, before automatically included within CRM Activity/History

### Associated CRM Entity Management

If a telephone call was related to a CRM entity (such as a CRM Case), this is featured in the telephone call Wrap-up

## intelli-CTi Post-Call Wrap-up Capability

- ❖ On the completion of each telephone call intelli-CTi provides a post-call wrap-up capability
- ❖ Summarizing the telephone call and capturing the in-call notes this feature enables further call options
- ❖ Provides the ability to further manage CRM activities, related Cases and/or Opportunities





**intelli-CTi™**  
for Microsoft Dynamics 365

## Post Call Wrap-up (Case Management)



### CRM Case Management

intelli-CTi provides the ability to quickly and easily manage related CRM Cases directly from within the Call Wrap-up process.

A CRM Case can be resolved or cancelled during the wrap-up, where further information can also be captured.

intelli-CTi for Microsoft Dynamics CRM - Telephone Call Wrapup

**intelli-CTi™** for Microsoft Dynamics CRM

Telephone Call Wrapup - Manage post telephone call actions and activities

Call Information

Call Direction (Result): Inbound (Established)

**Resolve**

Resolve

Provide information in the following boxes to resolve this .

Resolution Type \* Problem Solved

Resolution \* Sent customer a replacement part

Total Time 0 Minutes

Billable Time \* 0 Minute(s)

Description

Customer received shipment of bike upon arrival the brake lever was damaged. So we sent a replacement part to the customer.

**intelli-CTi™**

OK Cancel

Daniel Thompson, Bike Boutique

Call Related (CAS-00113-T5L8Y6) Remove Call Relationship

**Brake Lever damaged**

Priority:

Created on: 12 Jul 2018

Status: Active

Resolve Cancel Manage in CRM

### Telephone Call Manager

Showing a summary of the telephone call that has now ended.

intelli-CTi Call Manager

**intelli-CTi™**

Virtual Telephony Server (VTS) (1234)

Active Call List [1]

Inbound 5551126652

Daniel Thompson  
Office Manager  
Bike Boutique

Call Time: 11:28 - 11:28 (00:00:07)

Received a call from Daniel to say that the brake lever on the new bike we shipped him was damaged on arrival.

I have offered to ship him a replacement lever immediately for which he was happy.

## intelli-CTi Post-Call Wrap-up Capability (Case Management)

- ❖ The intelli-CTi call wrap-up capability provides the ability to directly manage CRM Cases
- ❖ Resolve the CRM Case directly from within the call wrap-up



Dynamics 365 Service Activities

TASK EMAIL APPOINTMENT PHONE CALL LETTER FAX DELETE EMAIL A LINK RUN REPORT

All Phone Calls Search for records

Due: All

Subject	Call From	Call To	Regarding	Direction	
Call From: Dan Williams	Dan Williams	QGate Software	New Opp - Dan	Incoming	3125
Call From: Dan Williams	QGate Software	Dan Williams	New Opp - Dan		
Call From: Dan Williams	QGate Software	Dan Williams	New Opp - Dan		
Call From: Dan Williams	Dan Williams	QGate Software	Dan Williams	In	
Call From: Daniel Thompson	Daniel Thompson	QGate Software	Brake Lever Damaged	In	
Call From: Daniel Thompson	Daniel Thompson	QGate Software	Daniel Thompson	In	
Call From: Daniel Thompson	Daniel Thompson	QGate Software	Daniel Thompson	In	
Call From: Daniel Thompson	Daniel Thompson	QGate Software	Daniel Thompson	In	
Call From: Daniel Thompson	Daniel Thompson	QGate Software	Brake Lever damaged	In	
Call From: Daniel Thompson	Daniel Thompson	QGate Software	Brake Lever damaged	In	

401 - 450 of 1251 (0 selected) All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Page 9

### CRM Activity Management

Each telephone call achieved using intelli-CTi is automatically recorded in the Dynamics 365 Activity/History, against each of the CRM entities the telephone call related to (e.g. CRM User, Account, Contact, Lead, Opportunity, Ticket, etc.).

### Phone Call List

Here shows a complete list of telephone calls made and received to a CRM entity (Contact).

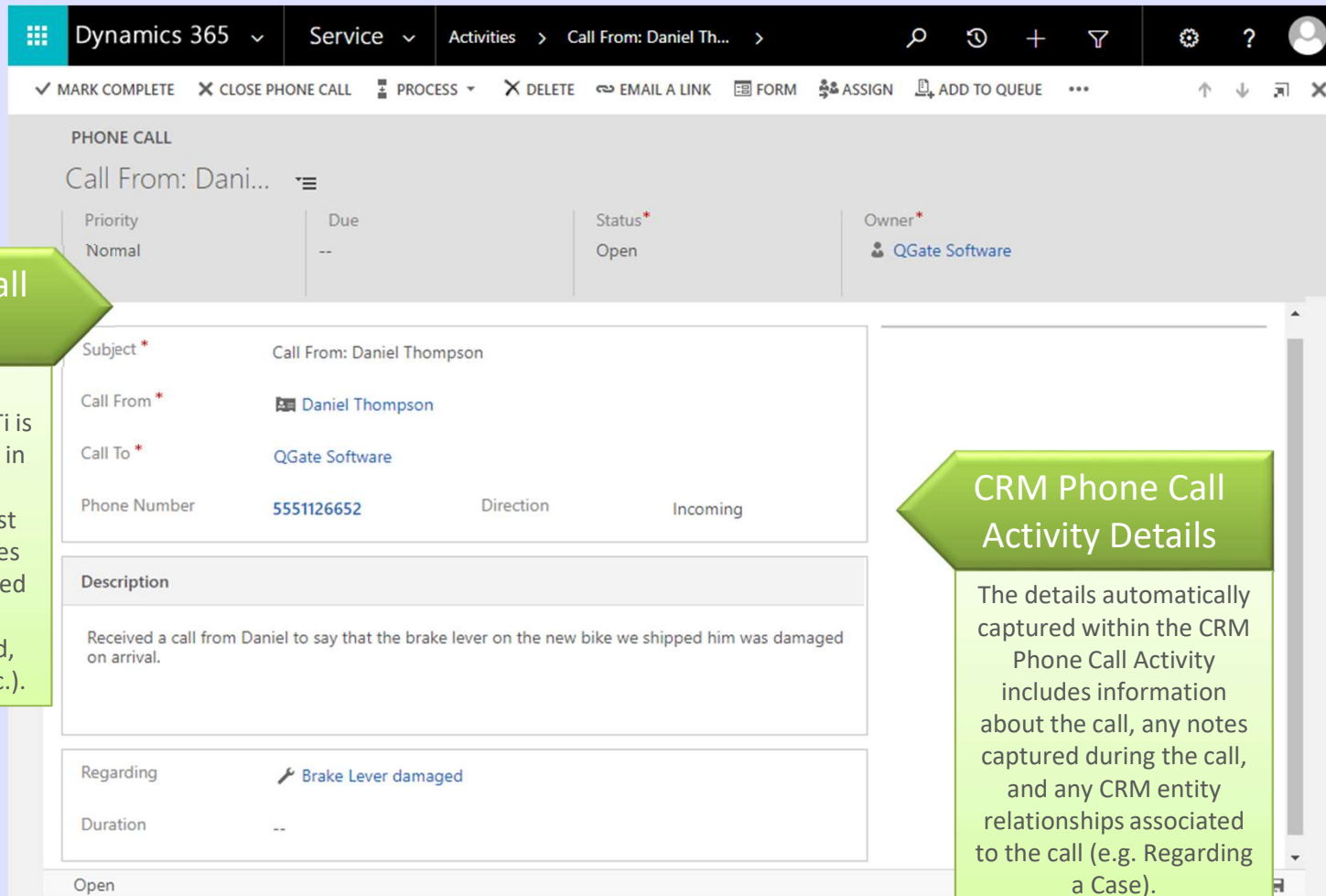
This activity list is automatically achieved through the call management of intelli-CTi.

## intelli-CTi Telephone Call Activity Management in Microsoft Dynamics 365

- ❖ Automatically capture every telephone call as a single CRM Activity/History item within Dynamics 365
- ❖ Automatically relate the CRM activity to all CRM entities related to the telephone call
- ❖ Automatically decorate the CRM activity with call information such as notes, regarding and call direction

## CRM Phone Call Activity

Each telephone call achieved using intelli-CTi is automatically recorded in the Dynamics 365 Activity/History, against each of the CRM entities the telephone call related to (e.g. CRM User, Account, Contact, Lead, Opportunity, Ticket, etc.).



**Dynamics 365** | Service | Activities > Call From: Daniel Th... | [Search] [Refresh] [Add] [Filter] [Settings] [Help] [Profile]

✓ MARK COMPLETE ✗ CLOSE PHONE CALL [Process] ✗ DELETE [Email A Link] [Form] [Assign] [Add To Queue] [More]

**PHONE CALL**

Call From: Dani...

Priority	Due	Status*	Owner*
Normal	--	Open	QGate Software

**Subject\*** Call From: Daniel Thompson

**Call From\*** Daniel Thompson

**Call To\*** QGate Software

**Phone Number** 5551126652 **Direction** Incoming

**Description**

Received a call from Daniel to say that the brake lever on the new bike we shipped him was damaged on arrival.

**Regarding** Brake Lever damaged

**Duration** --

Open

## CRM Phone Call Activity Details

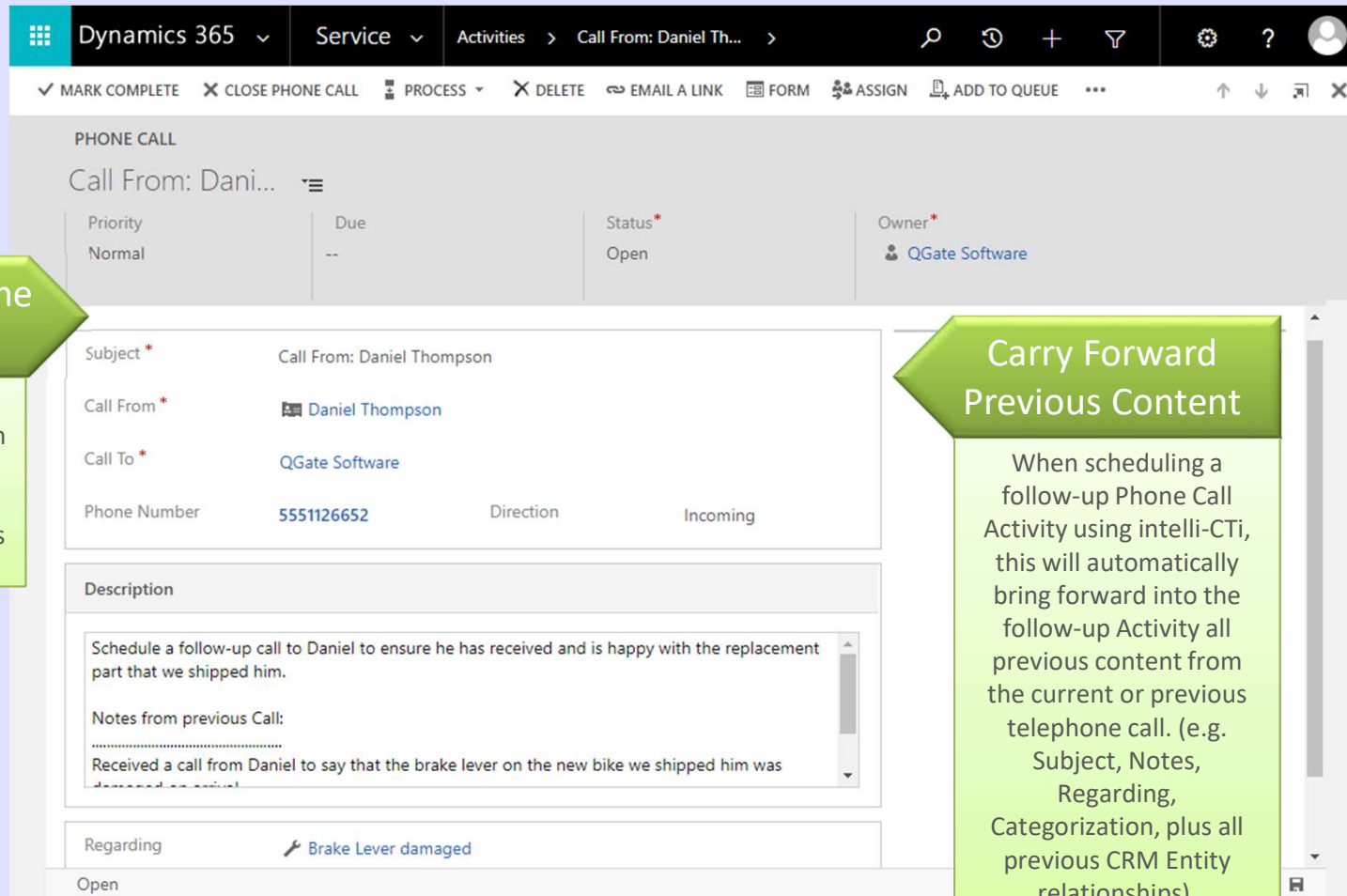
The details automatically captured within the CRM Phone Call Activity includes information about the call, any notes captured during the call, and any CRM entity relationships associated to the call (e.g. Regarding a Case).

## intelli-CTi Telephone Call Activity Management in Microsoft Dynamics 365

- ❖ intelli-CTi CRM Call Activity/History provides a complete chronological story of CRM interaction
- ❖ intelli-CTi's automatic capture of CRM Call Activity/History ensures CRM contact management best practises and harnesses the inherent activity management process flow of Microsoft Dynamics 365

## CRM Activity phone Call Follow-up

intelli-CTi provides the easy ability to create (from a single click) a follow-up CRM Phone Call Activity within Microsoft Dynamics 365.



The screenshot shows the Microsoft Dynamics 365 interface for a 'PHONE CALL' activity. The top navigation bar includes 'Dynamics 365', 'Service', and 'Activities > Call From: Daniel Th...'. Below the navigation bar is a toolbar with actions like 'MARK COMPLETE', 'CLOSE PHONE CALL', 'PROCESS', 'DELETE', 'EMAIL A LINK', 'FORM', 'ASSIGN', and 'ADD TO QUEUE'. The main content area displays the 'PHONE CALL' details for 'Call From: Dani...'. The details include:

- Priority:** Normal
- Due:** --
- Status:** Open
- Owner:** QGate Software
- Subject:** Call From: Daniel Thompson
- Call From:** Daniel Thompson
- Call To:** QGate Software
- Phone Number:** 5551126652
- Direction:** Incoming
- Description:**

Schedule a follow-up call to Daniel to ensure he has received and is happy with the replacement part that we shipped him.

Notes from previous Call:

Received a call from Daniel to say that the brake lever on the new bike we shipped him was damaged.
- Regarding:** Brake Lever damaged
- Open**

## Carry Forward Previous Content

When scheduling a follow-up Phone Call Activity using intelli-CTi, this will automatically bring forward into the follow-up Activity all previous content from the current or previous telephone call. (e.g. Subject, Notes, Regarding, Categorization, plus all previous CRM Entity relationships).

## intelli-CTi Telephone Call Activity Management in Microsoft Dynamics 365

- ❖ intelli-CTi CRM Call Activity/History management provides ease of call follow-ups
- ❖ Easily schedule follow-up telephone call activities where all information is automatically carried forward
- ❖ Telephone calls made from CRM Activity automatically become associated to the related entities





**Dynamics 365** | **Service** | **Call History**

NEW | DELETE | EMAIL A LINK | RUN REPORT | EXCEL TEMPLATES

My Call History

**Call History (for Contact)**  
A complete list of intelli-CTi Call History for a CRM Contact

**Call History (for Contact)**  
A link to intelli-CTi "Call History" is shown for each CRM entity that has related call history (e.g. Accounts, Contacts, Leads, Opportunities, Cases, etc.)

End Time	Subject	Call Duration	Call Result	Account
7/11/2018 4:59 AM		00:00:00	Missed	Bike Bouti
7/11/2018 4:57 AM	Call From: Daniel Thompson	00:01:24	Established	Bike Bouti
7/10/2018 11:42 ...		00:00:22	Established	FSA Home
7/10/2018 11:18 ...	Call To: 9Cell	00:00:52	Established	9Cell
7/10/2018 11:16 ...	Call To: Lou Balbo	00:00:24	Outbound	
7/10/2018 11:11 ...	Call From: Abigail Brown	00:03:01	Inbound	
7/10/2018 10:21 ...	Call To: Lou Balbo	00:00:22	Outbound	
7/10/2018 10:20 ...		00:21:30	Outbound	
7/10/2018 9:58 AM	Call To: Abigail Brown	00:02:00	Outbound	
7/10/2018 9:55 AM		00:00:00	Outbound	
7/10/2018 9:54 AM	Call To: Abigail Brown	00:00:15	Outbound	
7/10/2018 9:53 AM		00:00:40	Outbound	

1 - 50 of 1842 (0 selected) | All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z | Page 1

**intelli-CTi "Call History"**  
For each CRM entity that relates to a telephone activity (e.g. CRM Accounts, Contacts, Leads, Cases, Opportunities), intelli-CTi provides a detailed log of each telephone call interaction

## intelli-CTi Call History Tracking

- ❖ intelli-CTi Call History is an concise automated log of all telephone calls held within Dynamics 365
- ❖ Detailed statistical information about every telephone call both inbound and outbound
- ❖ Containing relationships to all related CRM entities for complete auditing, reporting and analysis



**intelli-CTi  
“Call History”**

intelli-CTi automatically records a detailed record within Dynamics 365 of each telephone call made or received, related to one or more CRM entities.

**Dynamics 365** | Service | Call History > Call From: Daniel Th... >

+ NEW | DEACTIVATE | DELETE | ASSIGN | SHARE | EMAIL A LINK | RUN WORKFLOW | START DIALOG

CALL HISTORY : INFORMATION  
Call From: Daniel Thompson

**Call Relationships**

Account	Bike Boutique	Lead	--
Contact	Daniel Thompson	Phone Call	Call From: Daniel Thompson
Case	Brake Lever Damaged	Opportunity	--
Call Info #1	Daniel Thompson	Call Info #2	Office Manager
Call Info #3	Bike Boutique		

**Call Notes**

Subject \* Call From: Daniel Thompson

Received a call from Daniel to say that the brake lever on the new bike we shipped him was damaged on arrival. I have offered to ship him a replacement lever immediately for which he was happy.

Owner \* QGate Software

Created By QGate Software

**Call Timings**

Start Time	7/11/2018 5:24 AM	Ring Time	00:00:12
End Time	7/11/2018 5:30 AM	Call Duration	00:06:15
Wrapup Time	00:00:06	Wrapup Date	7/11/2018

Status Active

### Call Relationships

Each Call History item can be linked to multiple CRM entities

### Call Notes

Any notes captured during the call are automatically logged.

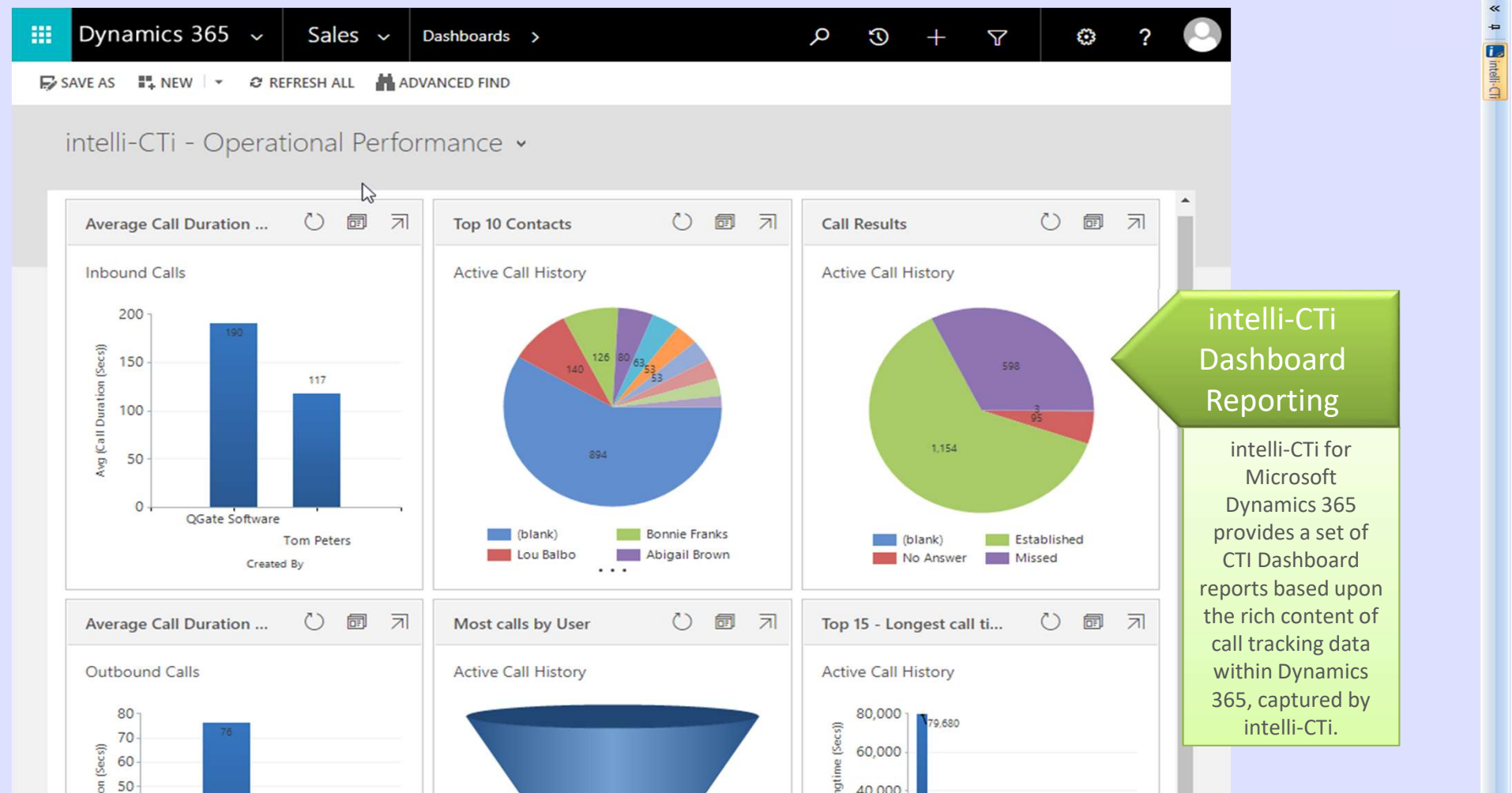
### Call Statistics

Each Call History item recorded within CRM has detailed statistics about the call.

These provide a valuable data for auditing, reporting and analysis.

## intelli-CTi Call History Tracking – History Item

- ❖ CRM Relationships: relating to the call such as Accounts, Contacts, Users, Cases and Opportunities
- ❖ Call Notes: the subject of the call and any notes captured during the call
- ❖ Call Statistics: include the timings of the call, call duration, call direction and call result

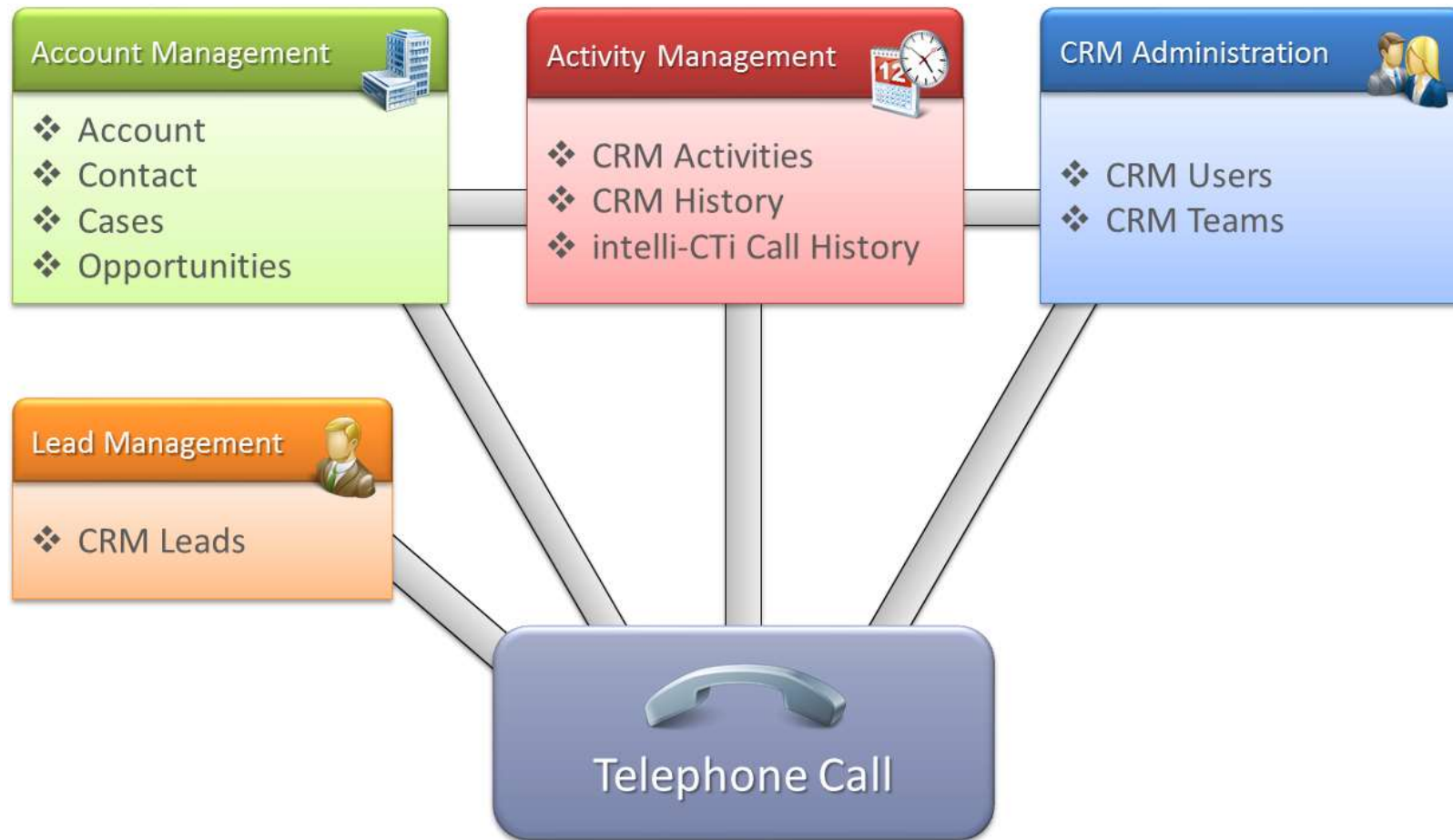


### intelli-CTi Dashboard Reporting

intelli-CTi for Microsoft Dynamics 365 provides a set of CTi Dashboard reports based upon the rich content of call tracking data within Dynamics 365, captured by intelli-CTi.

## intelli-CTi Microsoft Dynamics 365 CTi Dashboards

- ❖ intelli-CTi provides a set of CTi Dashboard reports for analysis of your intelli-CTi Call History
- ❖ Based upon the statistical information contained within the intelli-CTi Call History
- ❖ Extendable to provide more custom reporting



### intelli-CTi Microsoft Dynamics 365 Entity Relationship Management

- ❖ intelli-CTi provides an important ability to relate telephone calls to as many CRM entities as possible
- ❖ By relating a telephone call to a collection of CRM entities enables that entity to track its related calls
- ❖ Any given telephone call be seen by the entities it relates to and/or the calls relating to an entity (360°)



Associate the call with the right Contact  
(inbound call association)



**Automatic Association**

When the telephone rings, intelli-CTi shows all possible matches for that number. If there is only one Contact listed, the Call is automatically associated with it.

**Manual Association**

If there are several options, the user has to confirm the person's name and associate the call.

**Reassociation**

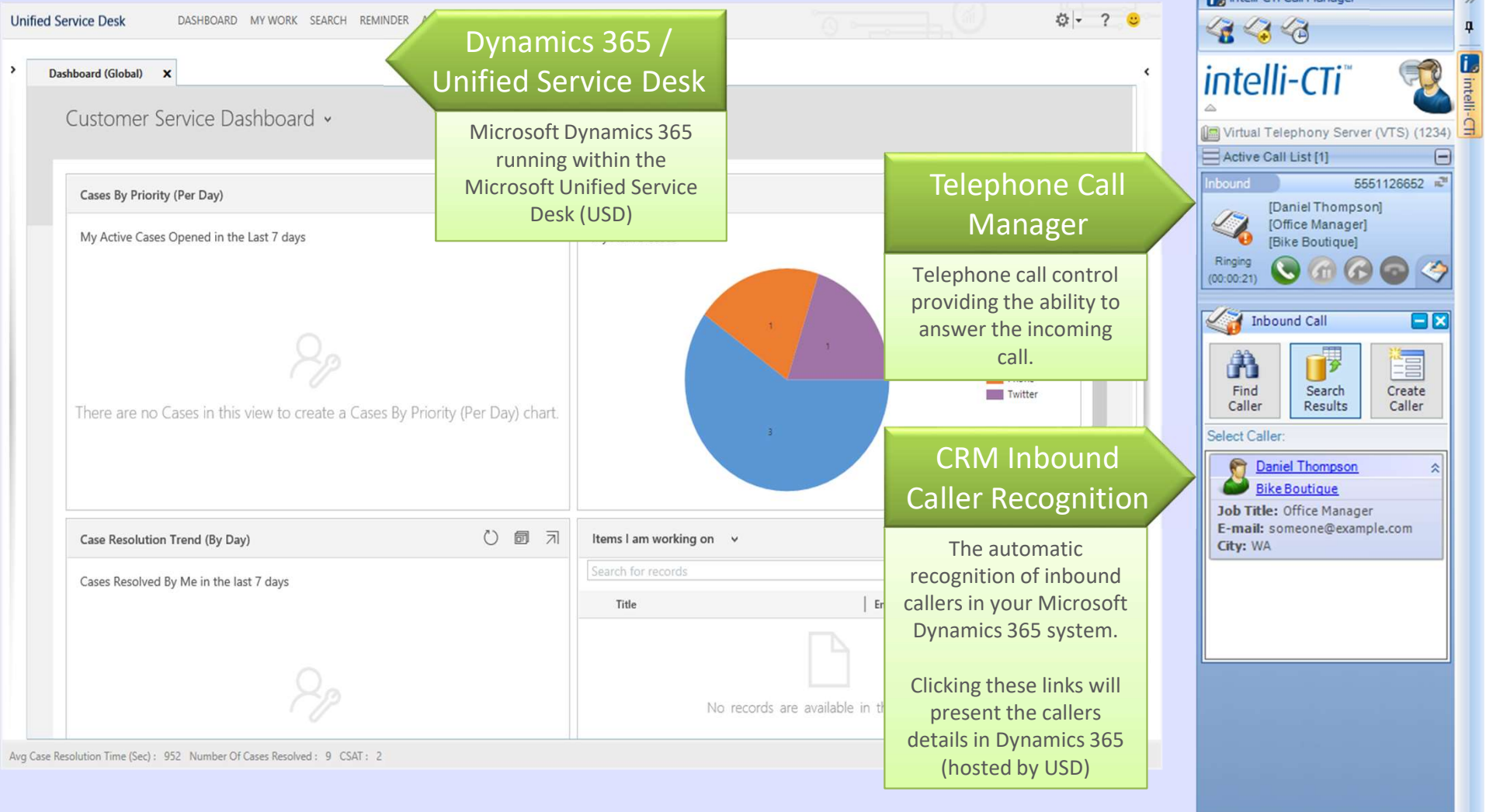
If the Call was associated with the wrong Contact, the user can revert that by Reassociating the call with another person. This can be done for Calls that were associated manually or automatically.

### Always associate the Call with the right person

- ❖ Simplify the call association by automating it when there is only one possibility
- ❖ Prompt users to confirm who is calling when there are several possible matches and Associate with one click
- ❖ Give users the possibility to Reassociate, fostering data accuracy without disrupting the ongoing conversation



*intelli-CTi*<sup>TM</sup>  
for Microsoft Dynamics 365  
With Microsoft Unified Service Desk

The screenshot shows the Unified Service Desk (USD) interface. On the left, the 'Customer Service Dashboard' is visible, showing 'Cases By Priority (Per Day)' and 'Case Resolution Trend (By Day)'. A green arrow points to the dashboard area with the text: 'Dynamics 365 / Unified Service Desk' and 'Microsoft Dynamics 365 running within the Microsoft Unified Service Desk (USD)'. In the center, a pie chart shows call distribution: 3 blue, 1 orange, and 1 purple. A green arrow points to the pie chart with the text: 'Telephone Call Manager' and 'Telephone call control providing the ability to answer the incoming call.' On the right, the 'intelli-CTi Call Manager' sidebar is active, showing an 'Inbound Call List [1]' with details for Daniel Thompson (Office Manager, Bike Boutique). A green arrow points to the sidebar with the text: 'CRM Inbound Caller Recognition' and 'The automatic recognition of inbound callers in your Microsoft Dynamics 365 system. Clicking these links will present the callers details in Dynamics 365 (hosted by USD)'.

### intelli-CTi Integration with Microsoft Unified Service Desk (USD) – Inbound Calls

- ❖ Receiving an inbound telephone call together with details of the caller while using USD
- ❖ Selection of the caller automatically notifies Unified Service Desk with the caller's details



**Unified Service Desk** | DASHBOARD | MY WORK | SEARCH | REMINDER | APPLICATIONS

**Daniel Thompson-W.A**

**General** | Social Info

Contact Name: Daniel Thompson  
Email: someone@example.com  
Phone: (555) 321-1234

**CALL SCRIPT**  
Welcome to Contact Session  
Welcome Daniel Thompson. Thank you for contacting Woodgrove Bank. My name is Stephen. How can I help you today?

**Associated Cases**  
Case Associa... | Search for records  
Filter on: Active | Include: Related "Reg"

**CONTACT** Daniel Thompson

**Summary**

**CONTACT INFORMATION**

Full Name *	Daniel Thompson
Job Title	Office Manager
Account Name	Bike Boutique
Email	someone@exam
Business Phone	(555) 321-1234
Mobile Phone	(555) 112-6652
Fax	
Preferred Method of	Any

**POSTS** | ASSISTANT

Enter post here

**Call Assistant**  
Call Associations: Reassociate  
Daniel Thompson  
Bike Boutique  
Bike Lever Damaged  
AS-00110-X1Y2H2  
Priority: Normal  
Created: 11 Jul 2018

**Telephone Call Manager**  
intelli-CTi telephone call control running seamlessly alongside USD, providing the ability to manage the telephone call and capture notes during the call.

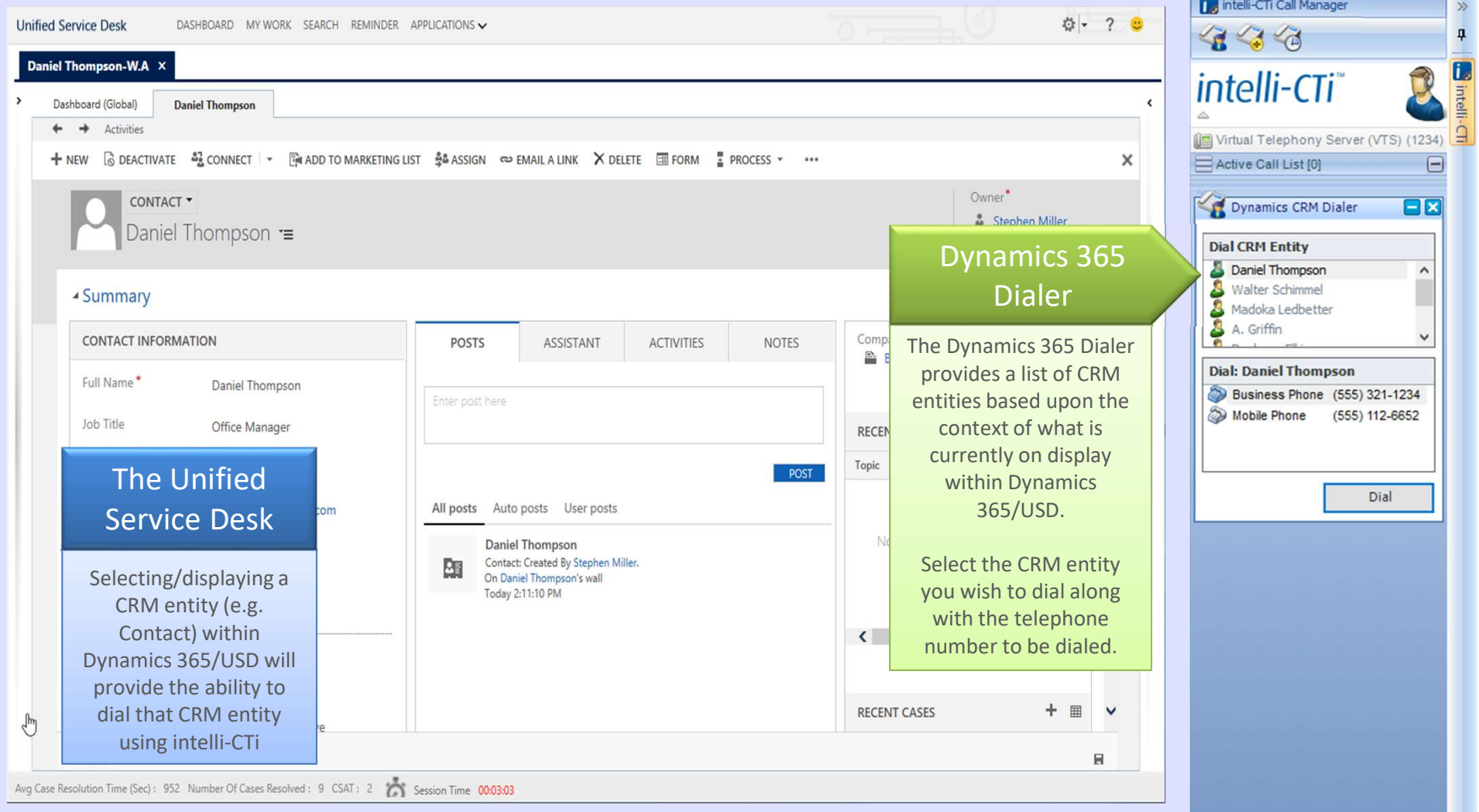
**The Unified Service Desk**  
The Microsoft Unified Service Desk application being driven by intelli-CTi

**intelli-CTi Screen Pop Inside USD**  
Upon clicking the link presented by intelli-CTi the callers details will appear within CRM/USD

## intelli-CTi Integration with Microsoft Unified Service Desk (USD) –Call Management

- ❖ Manage telephone call and capture notes during a telephone call, seamlessly alongside USD



**The Unified Service Desk**

Selecting/displaying a CRM entity (e.g. Contact) within Dynamics 365/USD will provide the ability to dial that CRM entity using intelli-CTi

**Dynamics 365 Dialer**

The Dynamics 365 Dialer provides a list of CRM entities based upon the context of what is currently on display within Dynamics 365/USD.

Select the CRM entity you wish to dial along with the telephone number to be dialed.

**Dial CRM Entity**

- Daniel Thompson
- Walter Schimmel
- Madoka Ledbetter
- A. Griffin

**Dial: Daniel Thompson**

- Business Phone (555) 321-1234
- Mobile Phone (555) 112-6652

Dial

Avg Case Resolution Time (Sec) : 952 Number Of Cases Resolved : 9 CSAT : 2 Session Time 00:03:03

## intelli-CTi Integration with Microsoft Unified Service Desk (USD) – Contact Dialing

- ❖ On opening a CRM entity detail form, intelli-CTi will present that entity within in the dialer
- ❖ Easily click-to-dial the selected CRM entity and their available telephone numbers



# *intelli-CTi*<sup>TM</sup>

for Microsoft Dynamics 365