intelli-CTi™

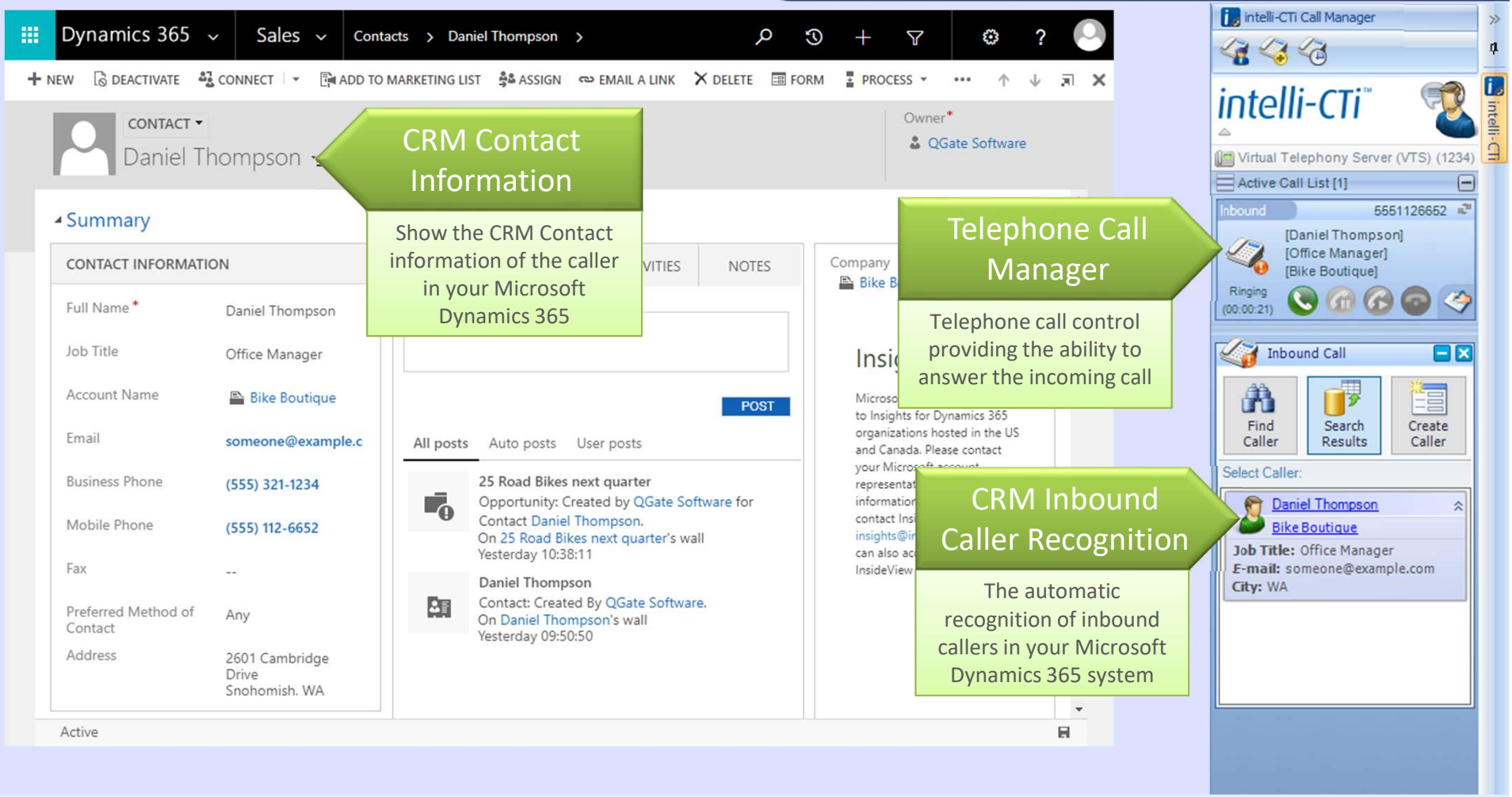
for Microsoft Dynamics 365

Product Tour

Copyright 2018 QGate Software Limited. intelli-CTi™ is a trademark of QGate Software Limited – all rights reserved.

intelli-CTi™ for Microsoft Dynamics 365

Receiving an Inbound Telephone Call



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 answer the incoming call

CRM Inbound Caller Recognition

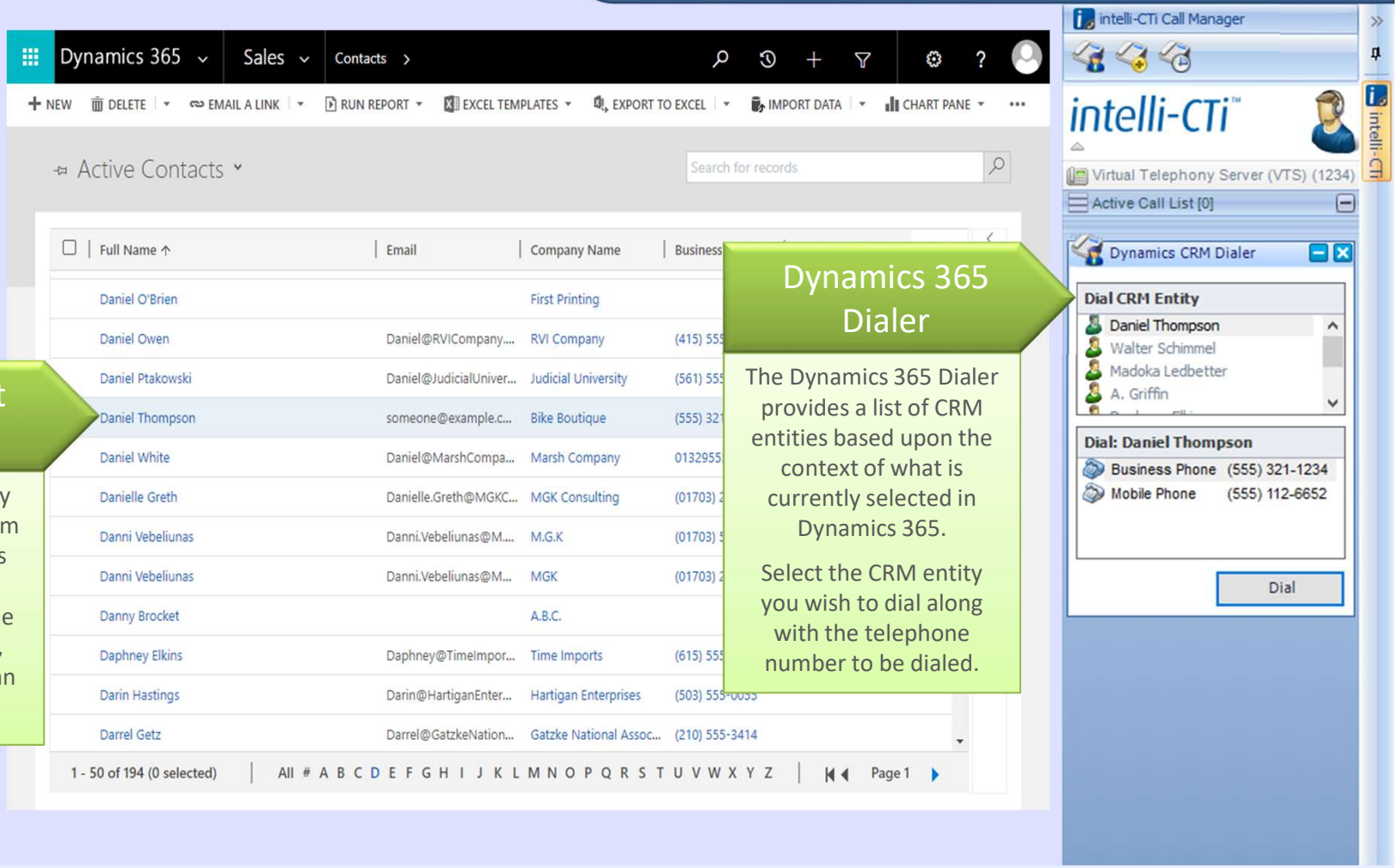
The automatic recognition of inbound callers in your Microsoft Dynamics 365 system

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

intelli-CTi™
for Microsoft Dynamics 365

Preview Dialing from CRM (List Dialing)



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.

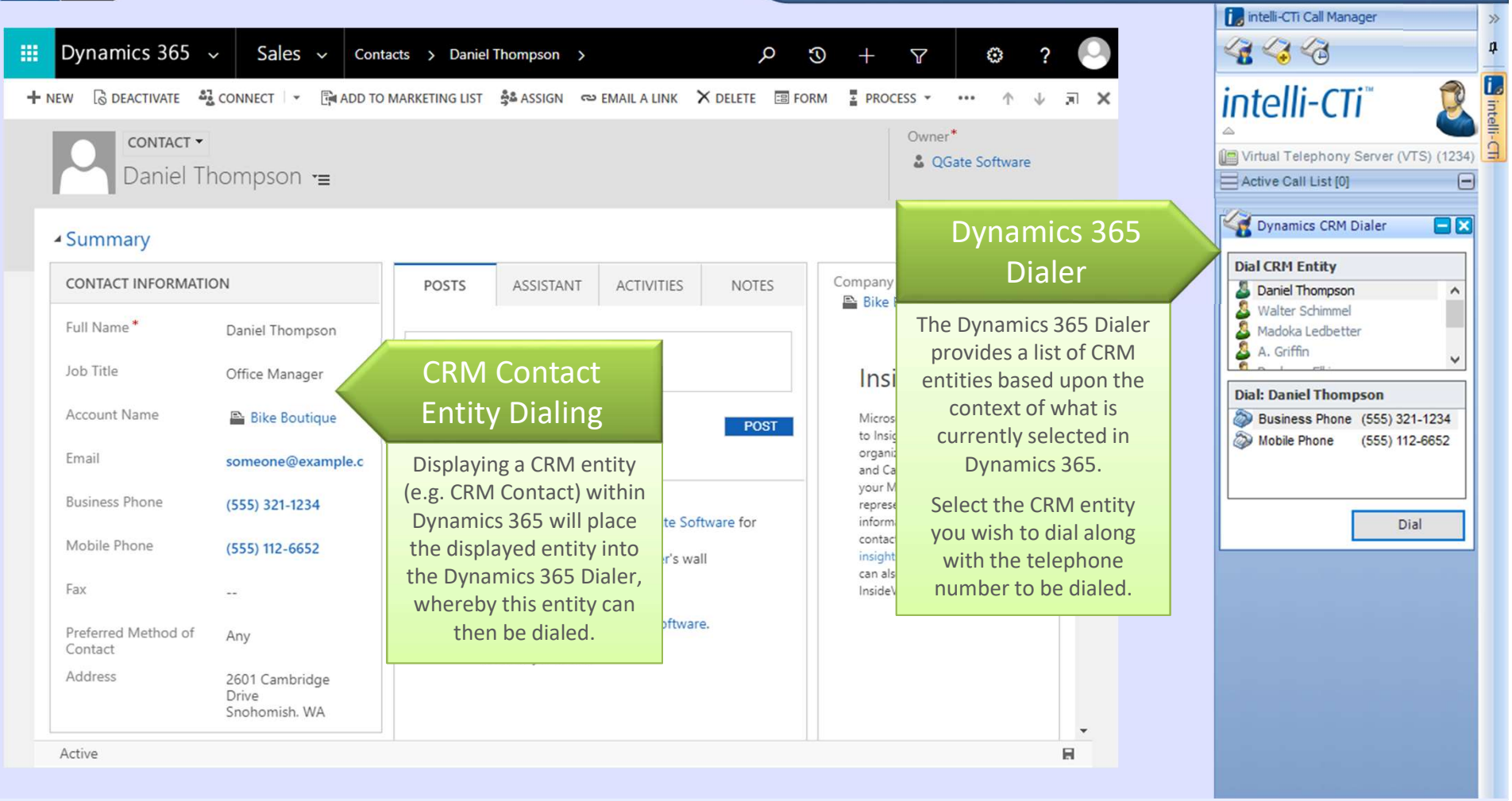
Select the CRM entity you wish to dial along with the telephone number to be dialed.

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

intelli-CTi™
for Microsoft Dynamics 365

Preview Dialing from CRM (Entity Detail Dialing)



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.

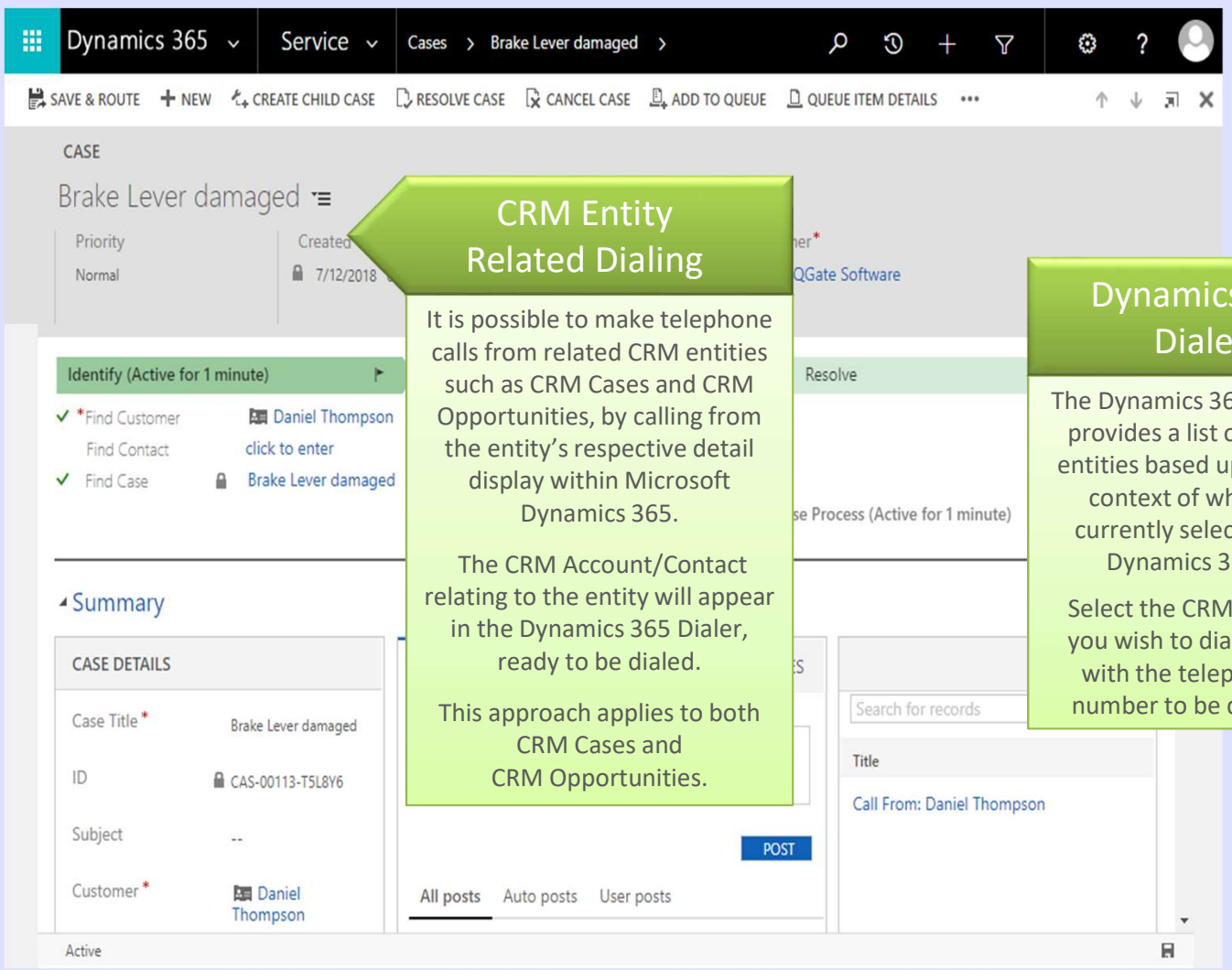
Select the CRM entity you wish to dial along with the telephone number to be dialed.

intelli-CTi 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

intelli-CTi™ for Microsoft Dynamics 365

Preview Dialing Related CRM Entities (e.g. Dial Contacts from a CRM Case)



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.

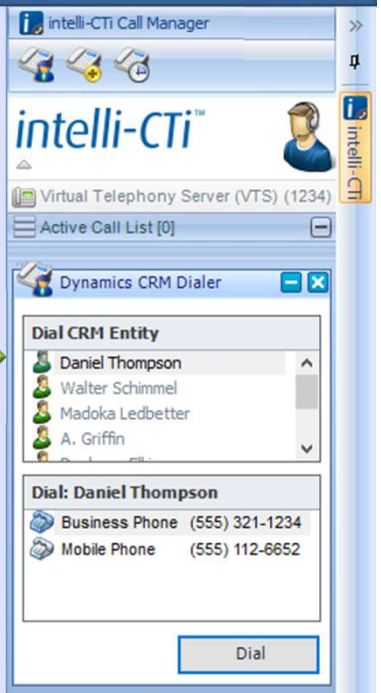
The CRM Account/Contact relating to the entity will appear in the Dynamics 365 Dialer, ready to be dialed.

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.



Automatic Call Association

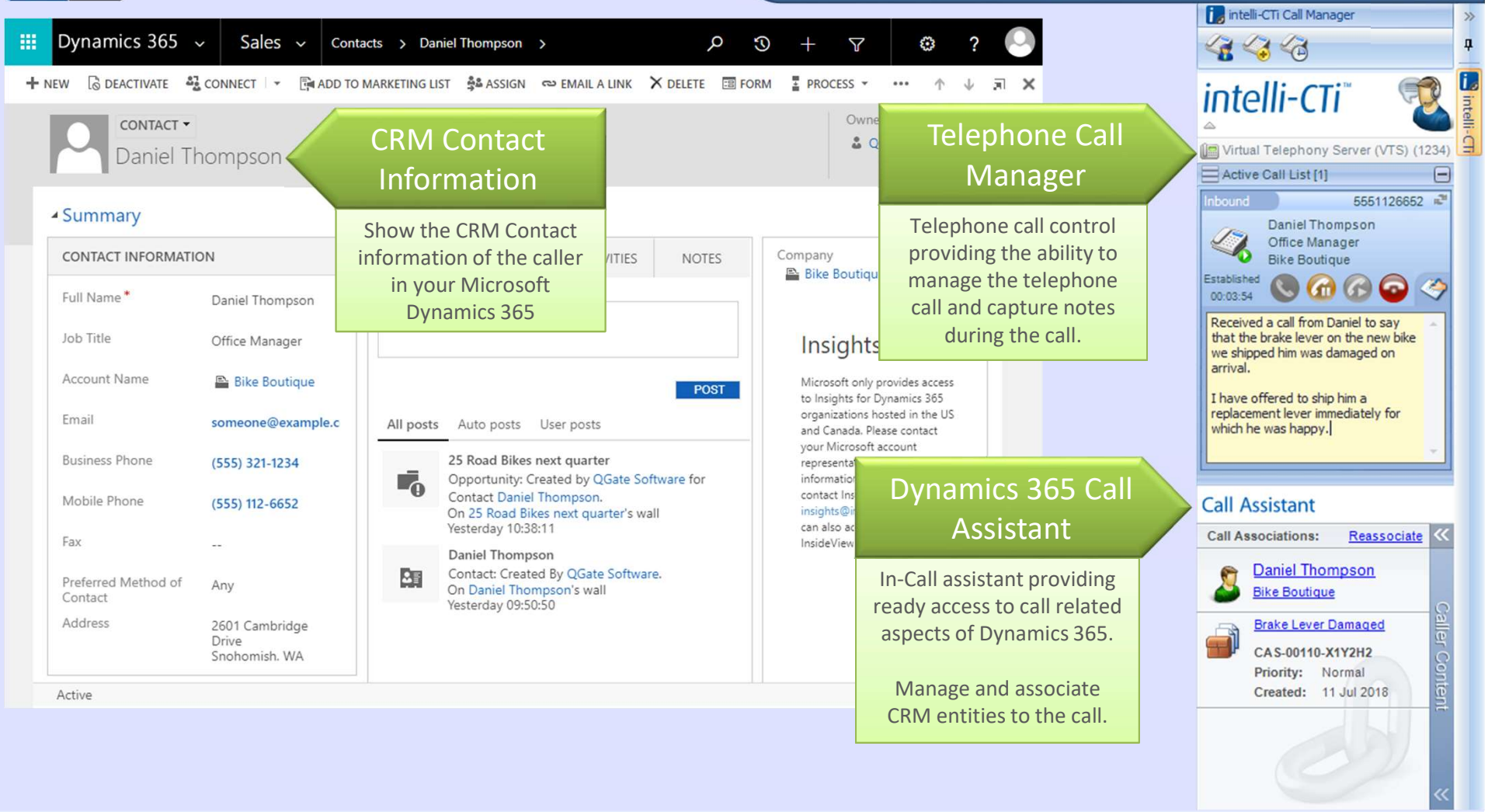
When dialing from a related CRM entity (e.g. CRM Case), the related entity automatically becomes associated to the telephone call.

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

intelli-CTi™ for Microsoft Dynamics 365

In-call Contact Management



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)

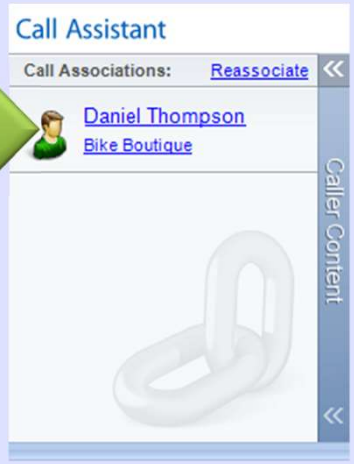
- Complete in-call management and call handling with association to CRM through the CRM Call Assistant
- In-call notepad capability (notes captured during a telephone call automatically logged in call history)
- Unique desktop sidebar enables total freedom to access Dynamics 365 throughout the entire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

intelli-CTi™
for Microsoft Dynamics 365

Microsoft Dynamics 365 Call Assistant

Call Assistant (initial view)

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

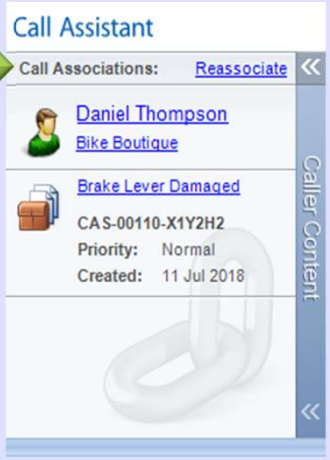


Caller Content

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

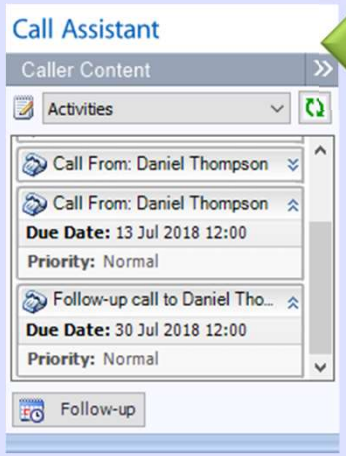
Call Assistant (Association view)

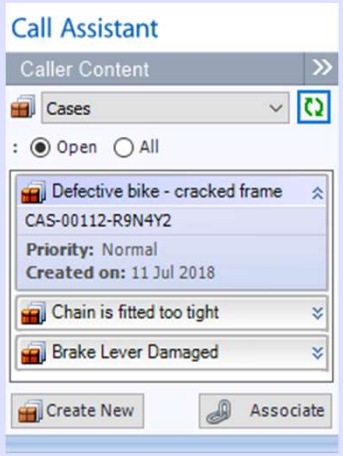
Once CRM content such as CRM Cases and/or CRM Opportunities have been associated to the call, these are then displayed in the Call Associations Section.

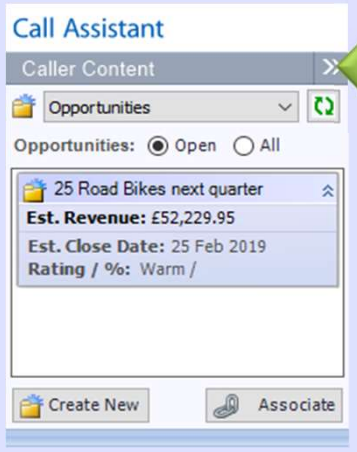


Call Assistant "Activity View"

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

intelli-CTi™
for Microsoft Dynamics 365

Post Telephone Call Wrap-up

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

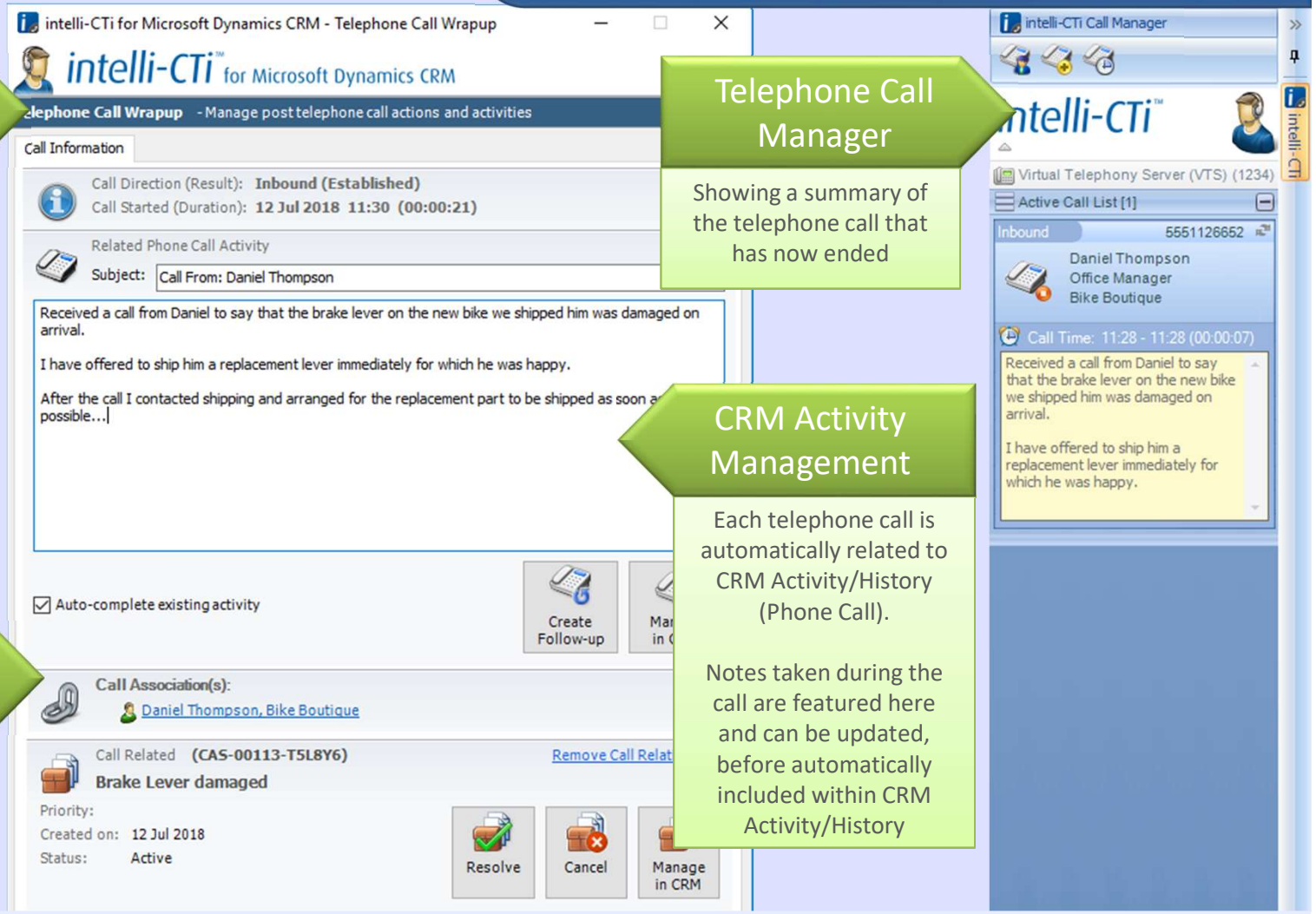
CRM Activity Management

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

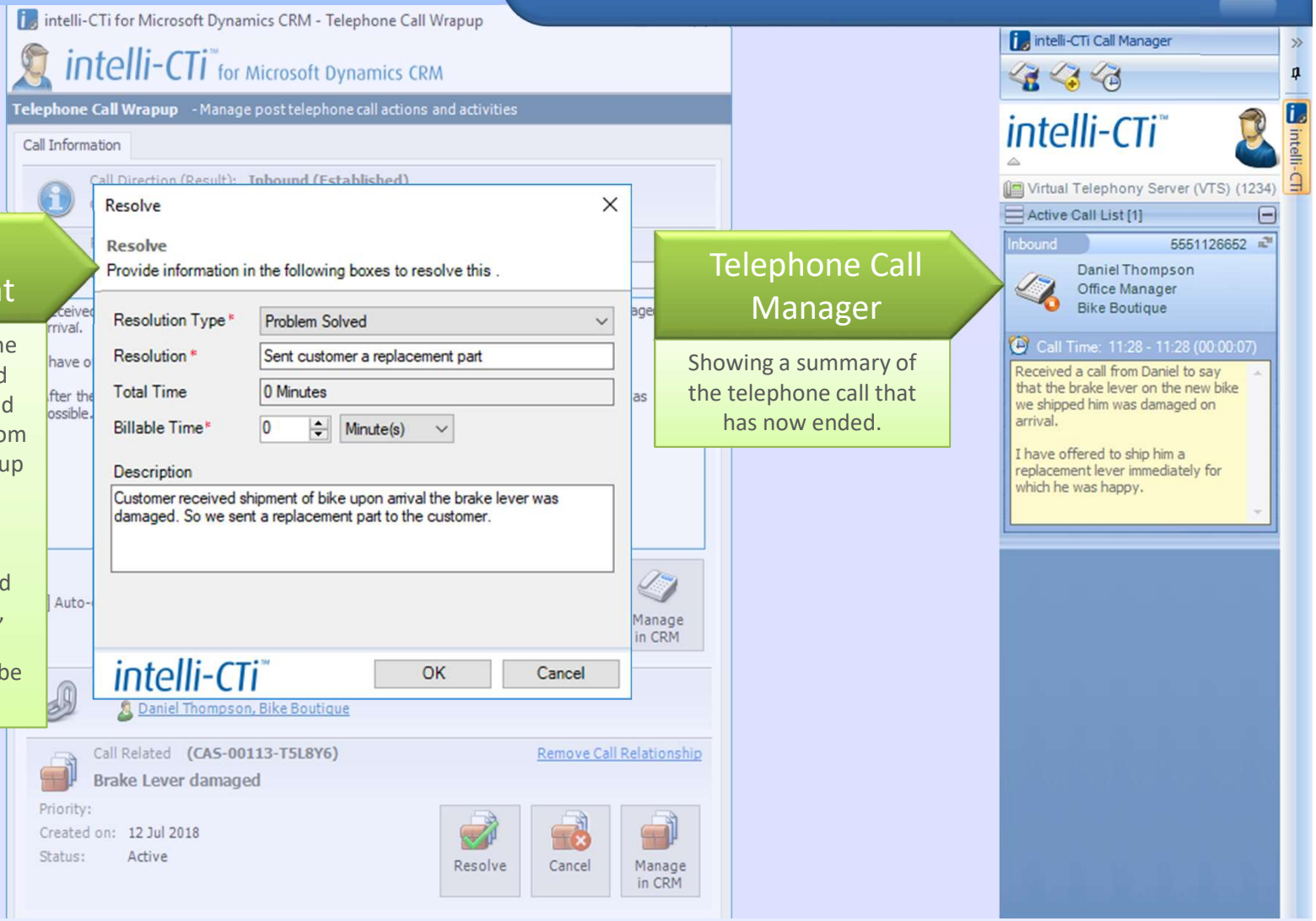


intelli-CTi Post-Call Wrap-up Capability

- 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.

Telephone Call Manager

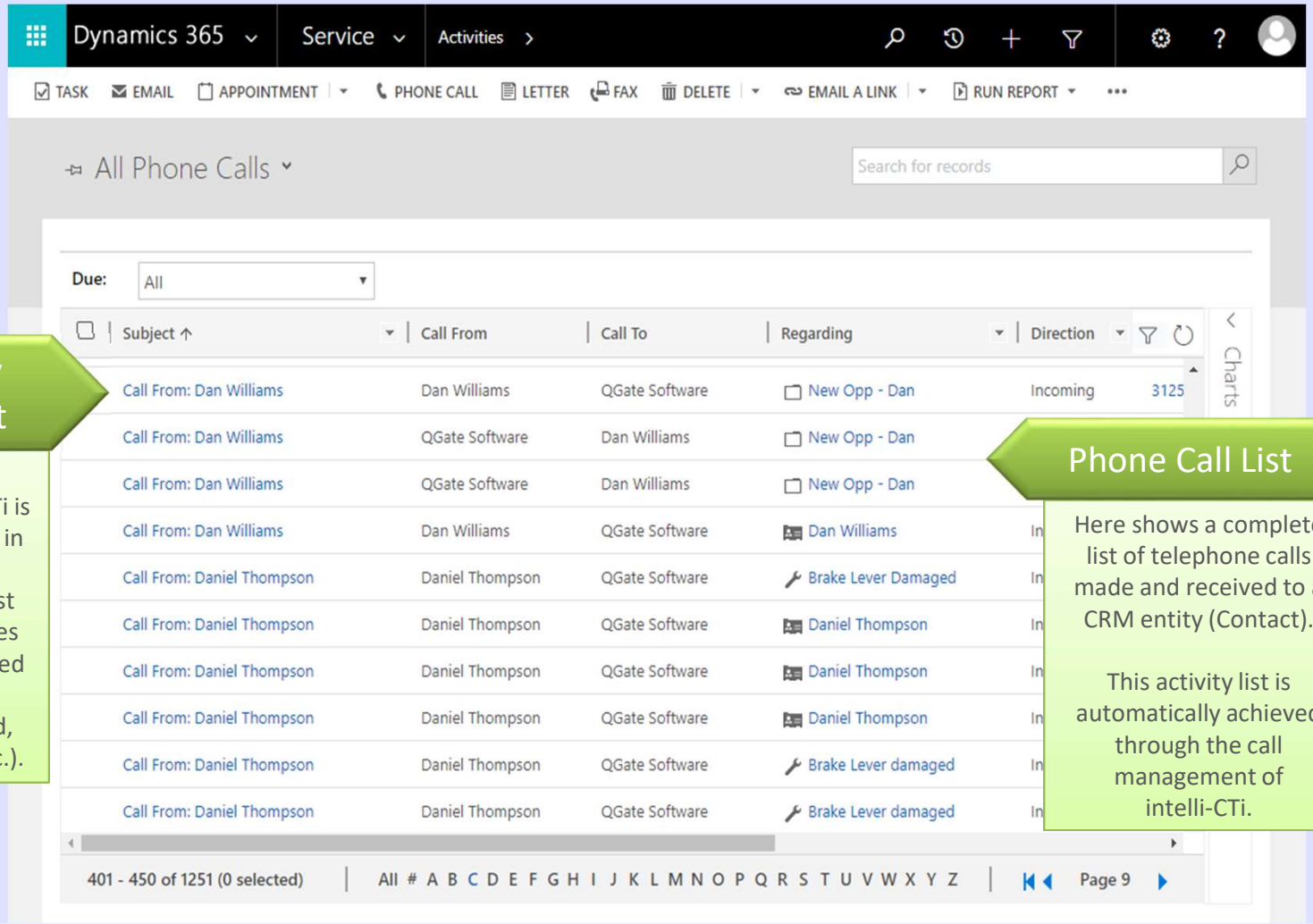
Showing a summary of the telephone call that has now ended.

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

intelli-CTi™
for Microsoft Dynamics 365

Microsoft Dynamics 365
Call Activity Management



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).

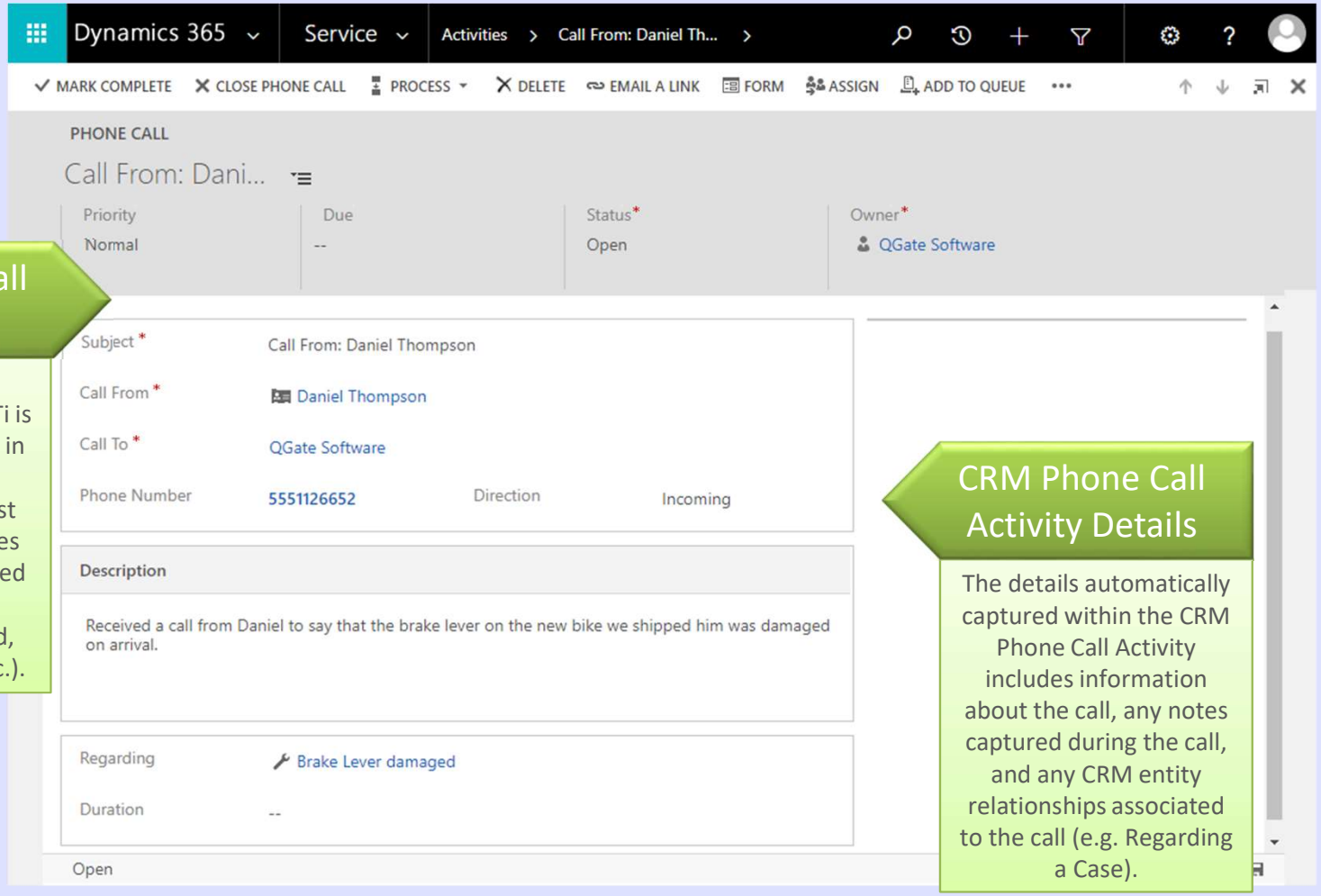
This activity list is automatically achieved through the call management of intelli-CTi.

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

intelli-CTi™
for Microsoft Dynamics 365

Microsoft Dynamics 365
Call Activity Management



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.).

CRM Phone Call Activity Details

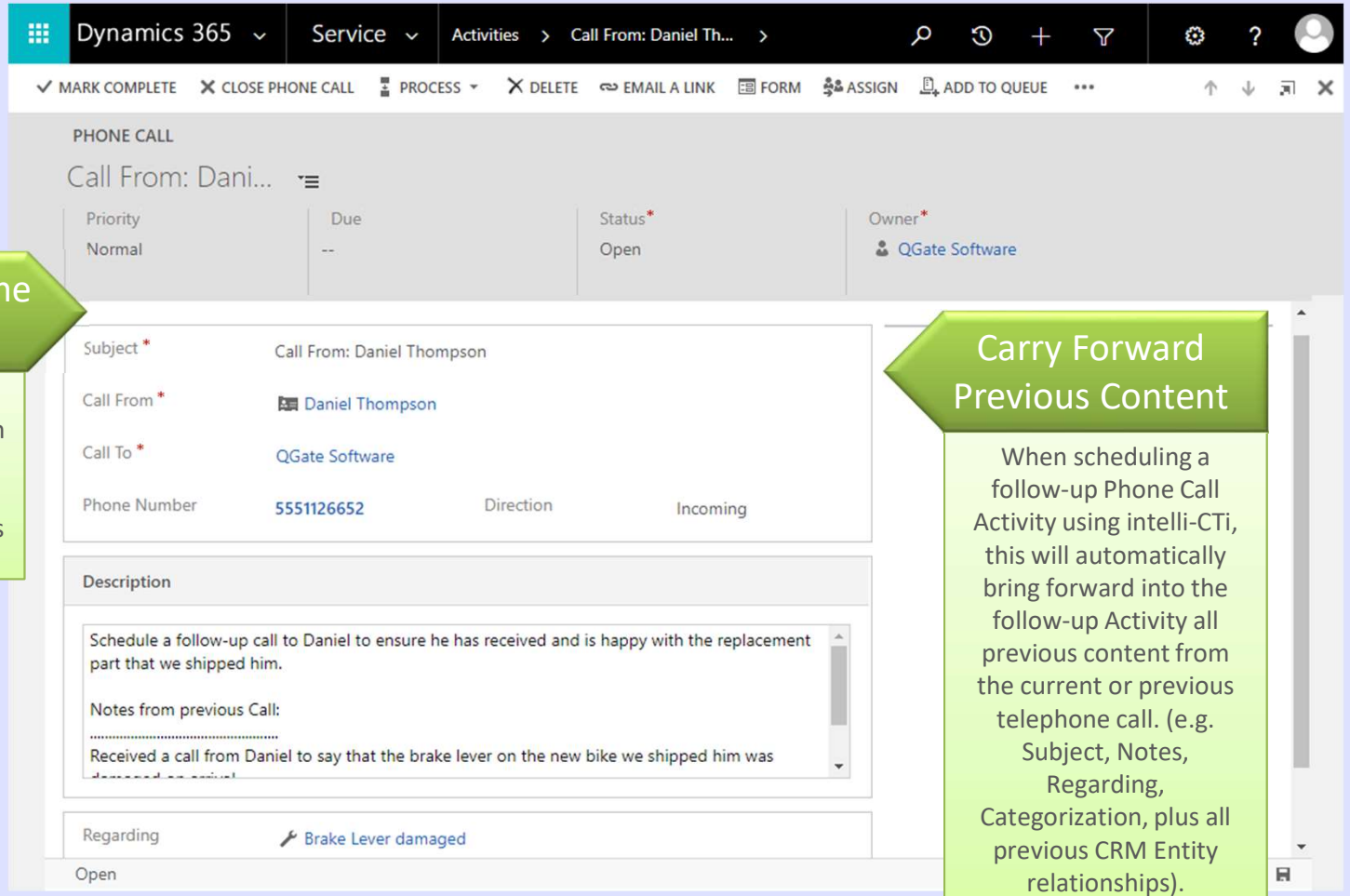
The details automatically captured within the CRM Phone Call Activity includes information about the call, any notes captured during the call, and any CRM entity relationships associated to the call (e.g. Regarding a Case).

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

intelli-CTi™
for Microsoft Dynamics 365

Microsoft Dynamics 365
Call Activity "Follow-up"



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.

Carry Forward Previous Content

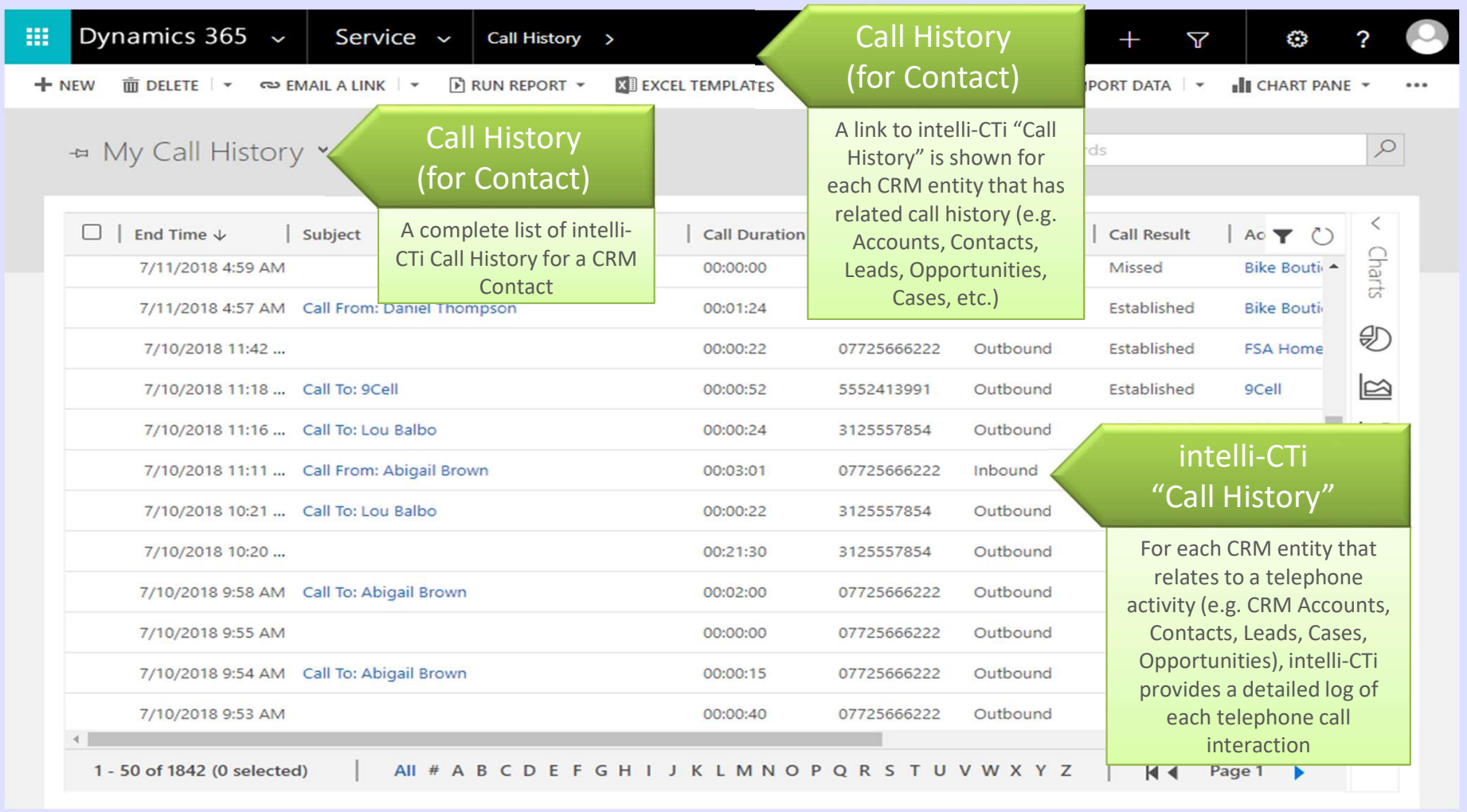
When scheduling a follow-up Phone Call Activity using intelli-CTi, this will automatically bring forward into the follow-up Activity all previous content from the current or previous telephone call. (e.g. Subject, Notes, Regarding, Categorization, plus all previous CRM Entity relationships).

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

intelli-CTi™
for Microsoft Dynamics 365

intelli-CTi Call History Tracking (with Microsoft Dynamics 365)



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.)

intelli-CTi "Call History"

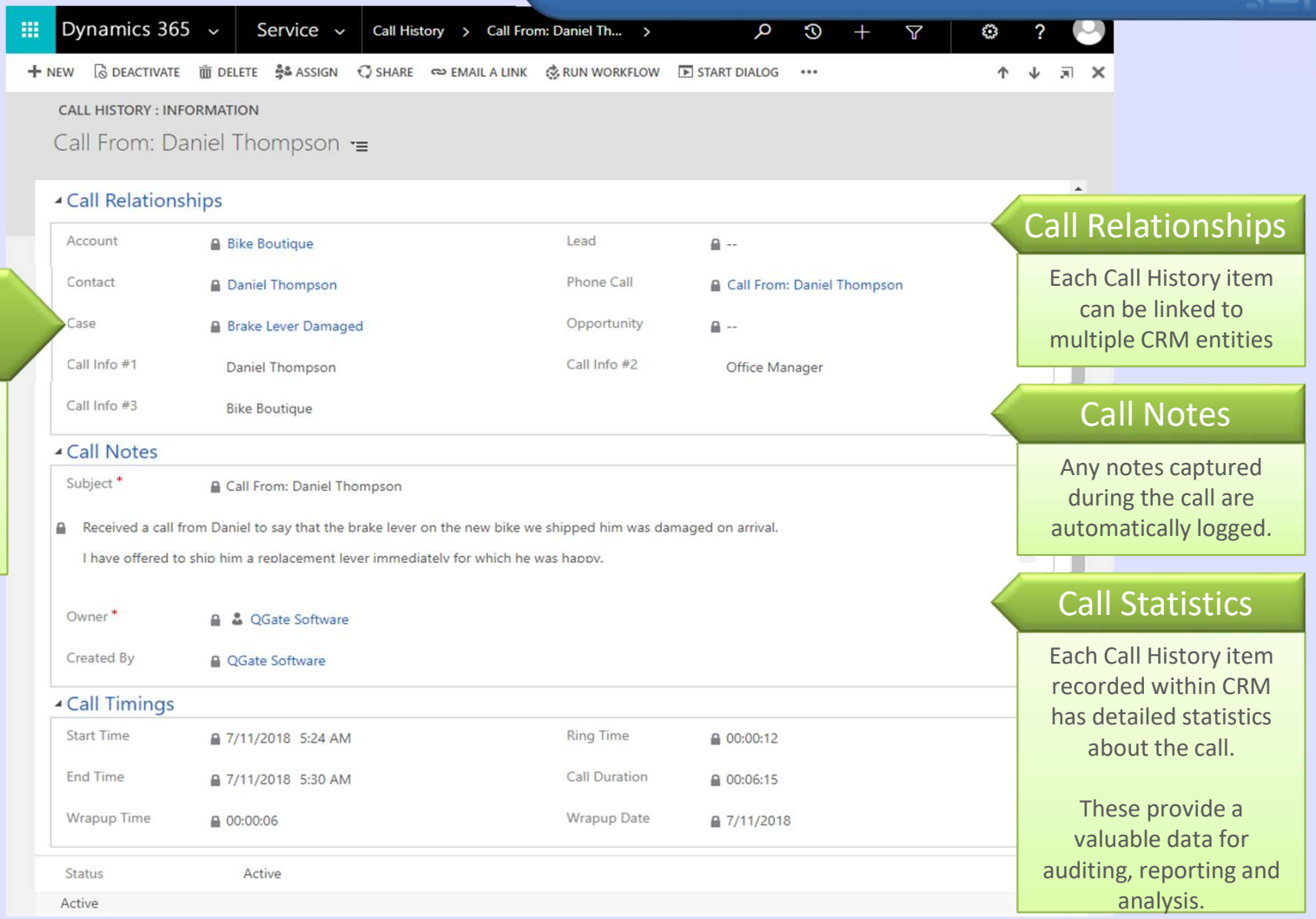
For each CRM entity that relates to a telephone activity (e.g. CRM Accounts, Contacts, Leads, Cases, Opportunities), intelli-CTi provides a detailed log of each telephone call interaction

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™ for Microsoft Dynamics 365

intelli-CTi Call History Tracking (with Microsoft Dynamics 365)



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.

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.

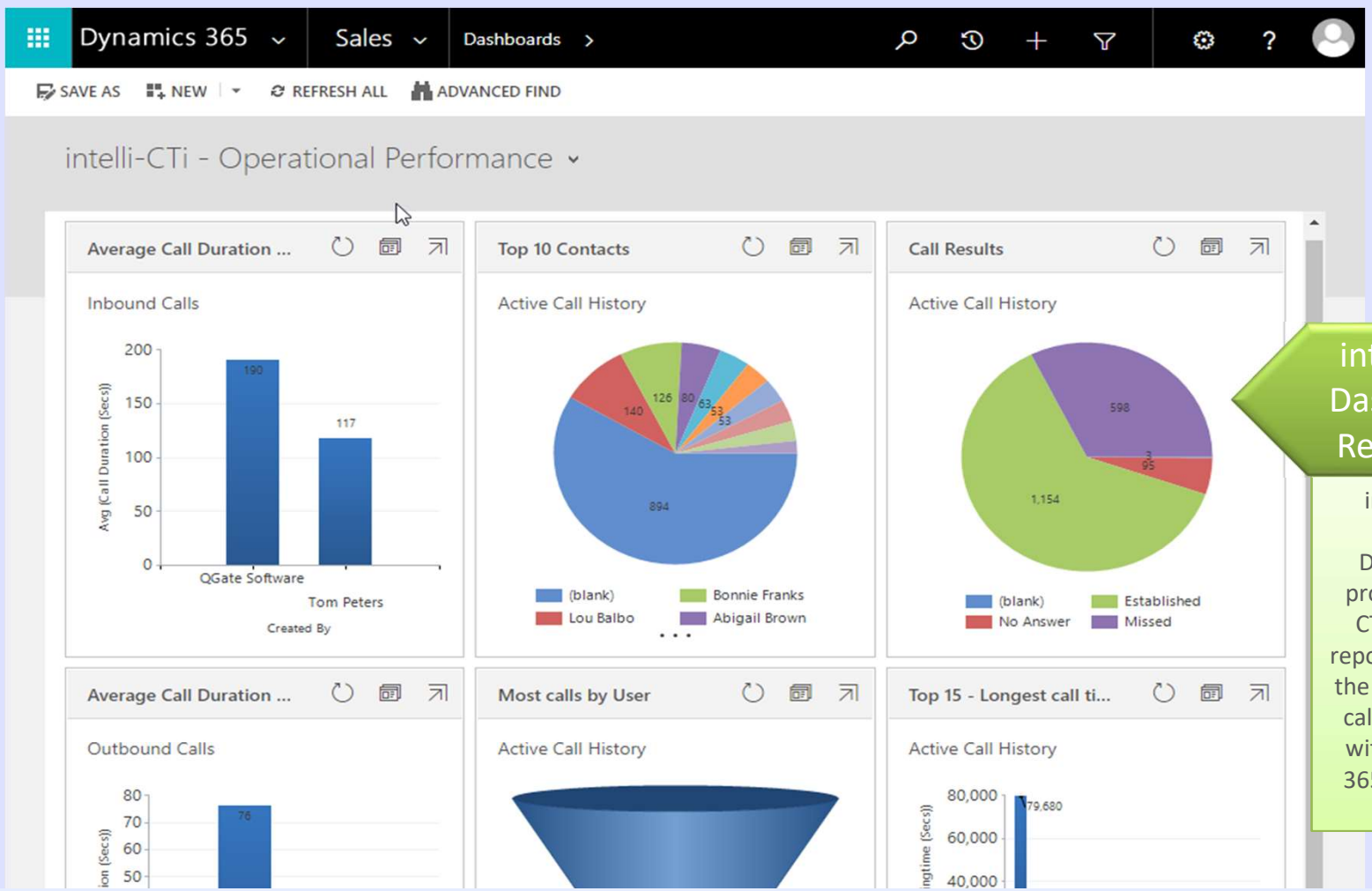
These provide a valuable data for auditing, reporting and analysis.

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™
for Microsoft Dynamics 365

Microsoft Dynamics 365 CTi Dashboards



intelli-CTi Dashboard Reporting

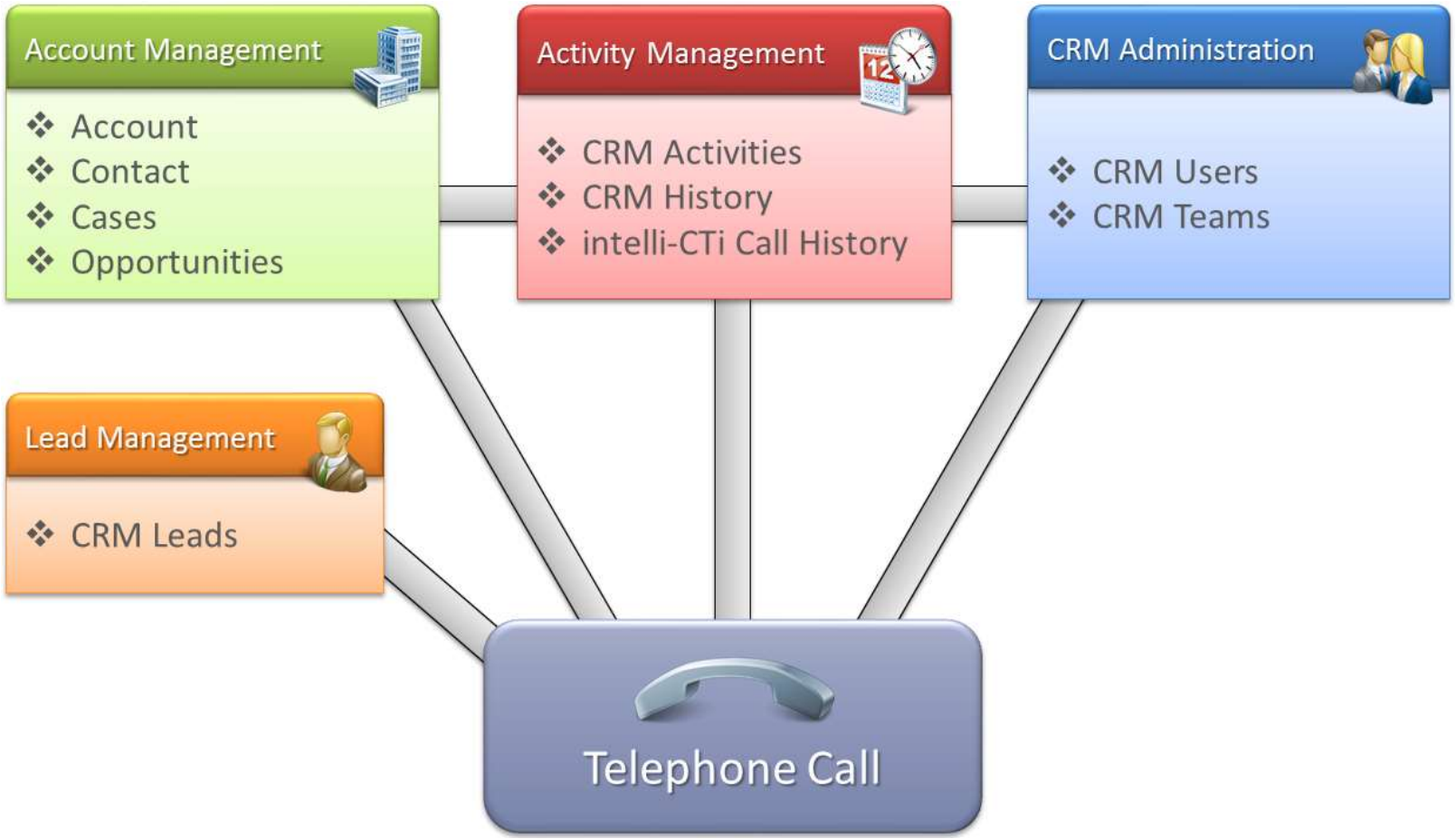
intelli-CTi for Microsoft Dynamics 365 provides a set of CTI Dashboard reports based upon the rich content of call tracking data within Dynamics 365, captured by intelli-CTi.

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™
for Microsoft Dynamics 365

Microsoft Dynamics 365
Entity Relationship Management



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°)

intelli-CTi™ for Microsoft Dynamics 365

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™

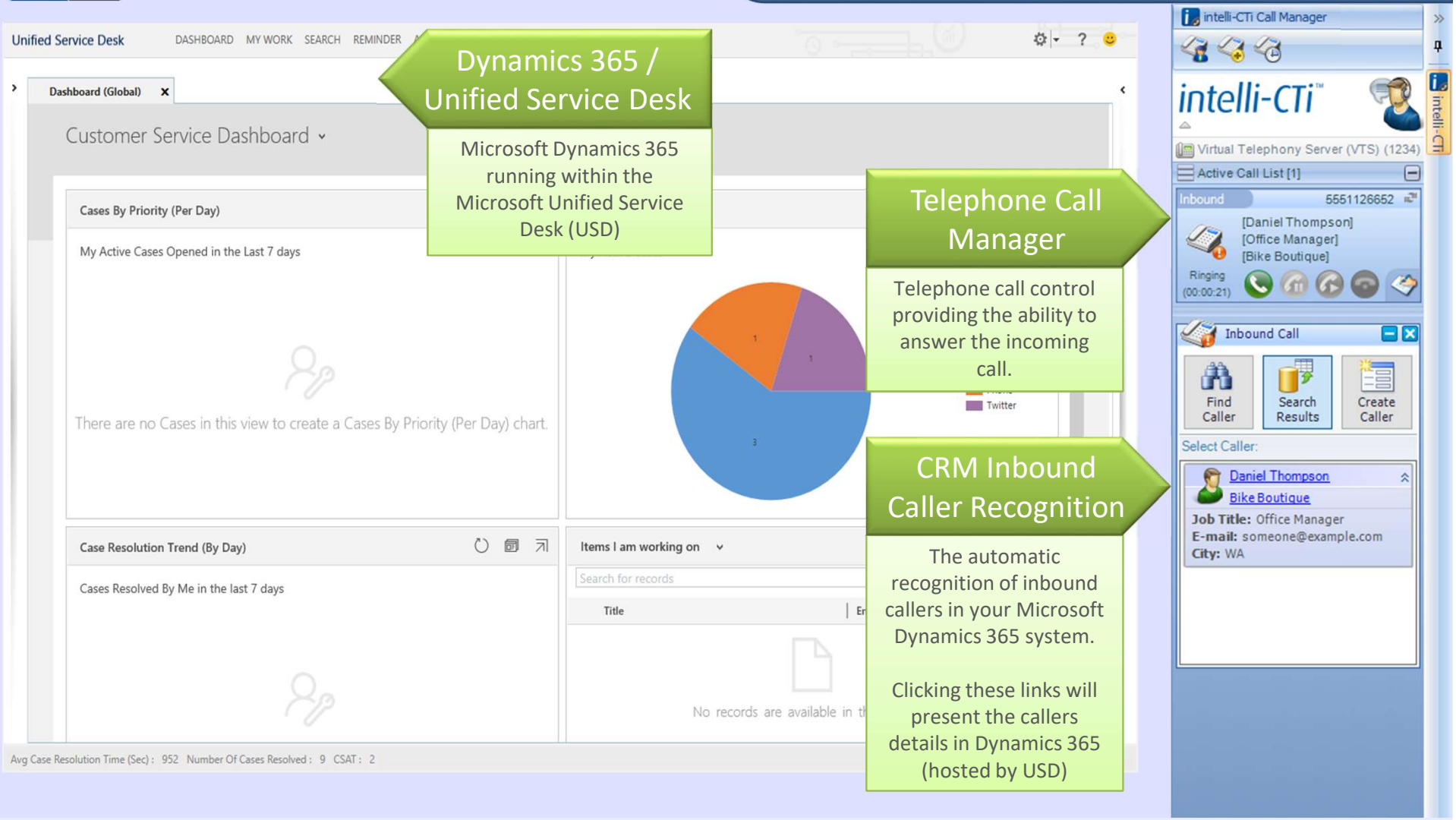
for Microsoft Dynamics 365

With Microsoft Unified Service Desk

Copyright 2018 QGate Software Limited. intelli-CTi™ is a trademark of QGate Software Limited – all rights reserved.

intelli-CTi™
for Microsoft Dynamics 365

Microsoft Dynamics 365
Unified Service Desk Integration



Dynamics 365 / Unified Service Desk

Microsoft Dynamics 365 running within the Microsoft Unified Service Desk (USD)

Telephone Call Manager

Telephone call control providing the ability to answer the incoming call.

CRM Inbound Caller Recognition

The automatic recognition of inbound callers in your Microsoft Dynamics 365 system.

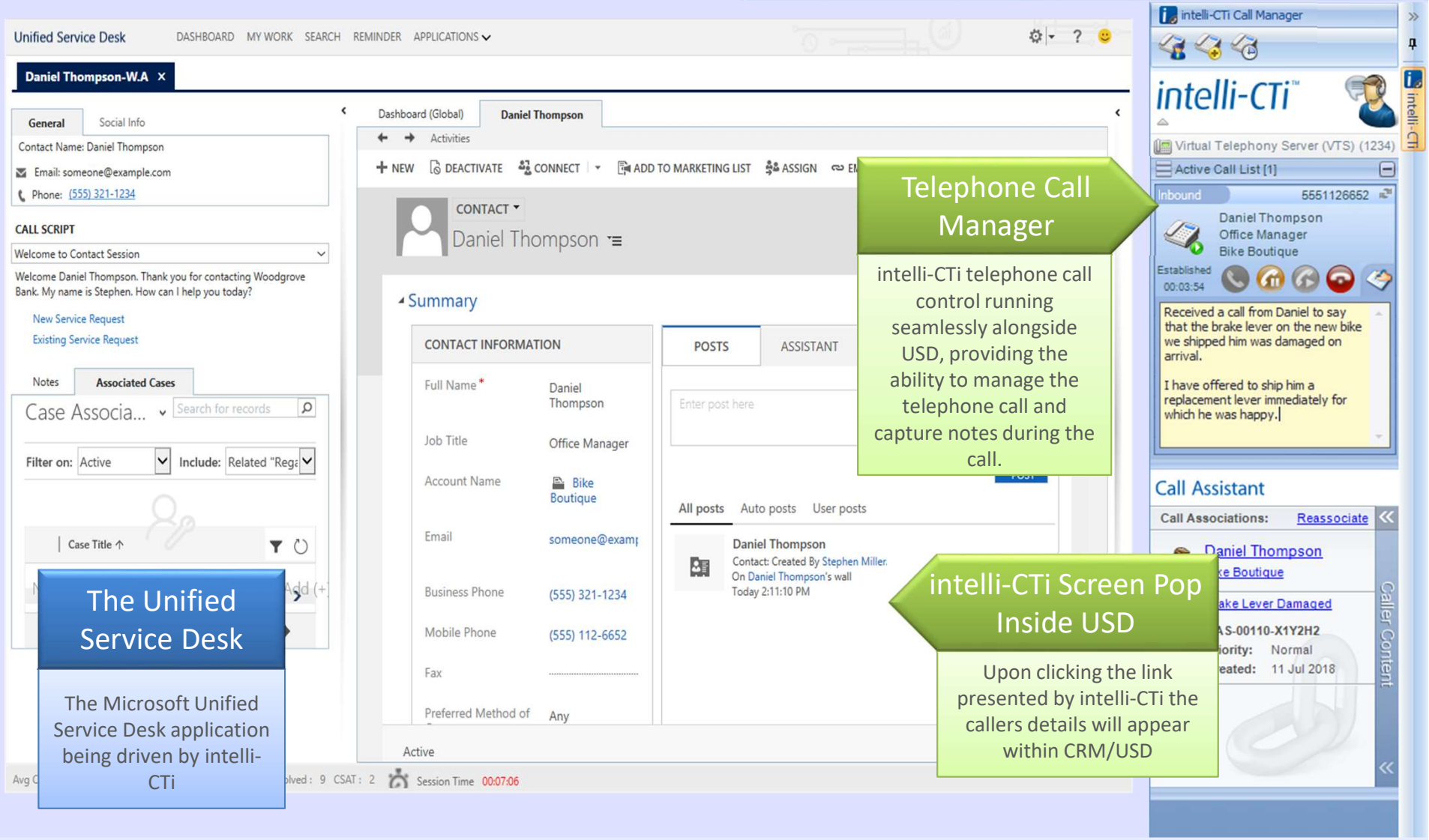
Clicking these links will present the callers details in Dynamics 365 (hosted by USD)

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

intelli-CTi™ for Microsoft Dynamics 365

Microsoft Dynamics 365 Unified Service Desk Integration



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

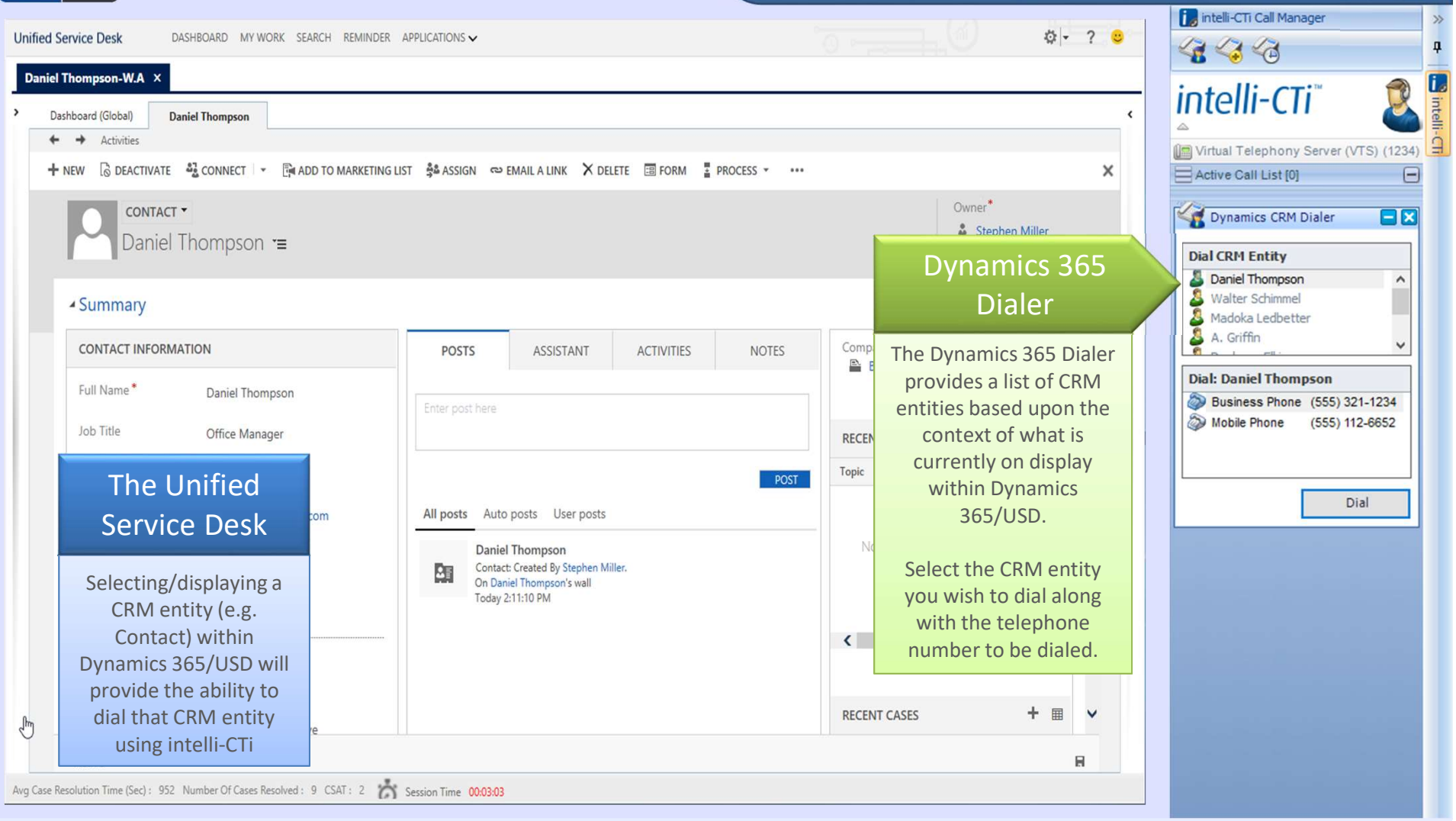
Upon clicking the link presented by intelli-CTi the callers details will appear within CRM/USD

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

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

intelli-CTi™
for Microsoft Dynamics 365

Microsoft Dynamics 365 Unified Service Desk Integration



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.

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

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™

for Microsoft Dynamics 365

Copyright 2018 QGate Software Limited. intelli-CTi™ is a trademark of QGate Software Limited – all rights reserved.