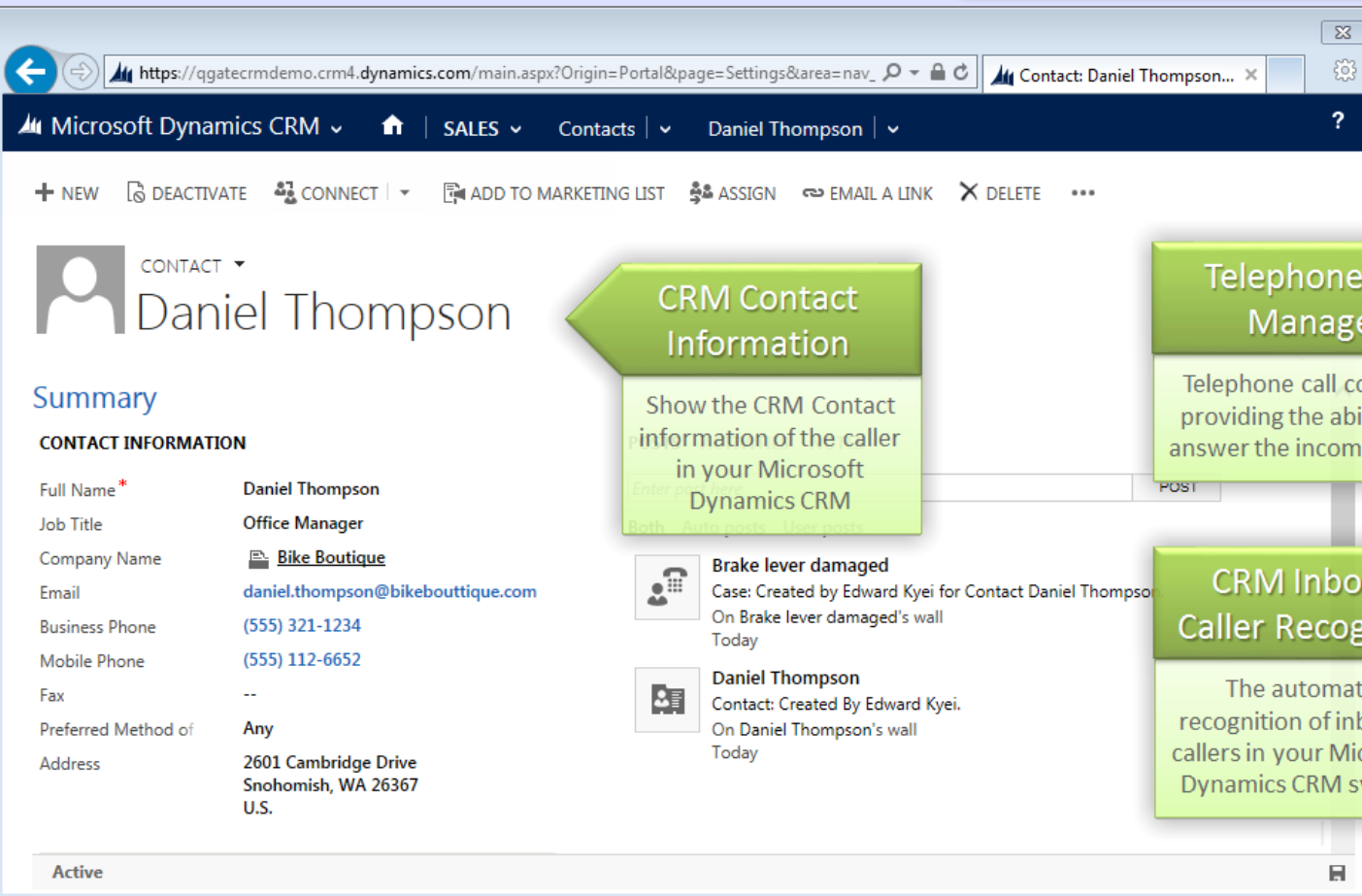




*intelli-CTi*TM
for Microsoft Dynamics 365
Product Tour

CRM Contact Information
Show the CRM Contact information of the caller in your Microsoft Dynamics CRM

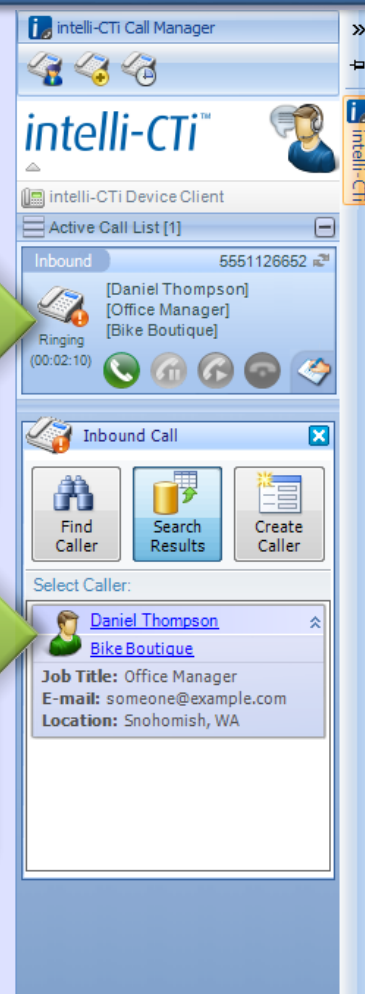
Telephone Call Manager
Telephone call control providing the ability to answer the incoming call

CRM Inbound Caller Recognition
The automatic recognition of inbound callers in your Microsoft Dynamics CRM system

CONTACT INFORMATION

Full Name*	Daniel Thompson
Job Title	Office Manager
Company Name	Bike Boutique
Email	daniel.thompson@bikeboutique.com
Business Phone	(555) 321-1234
Mobile Phone	(555) 112-6652
Fax	--
Preferred Method of	Any
Address	2601 Cambridge Drive Snohomish, WA 26367 U.S.

Active



intelli-CTi Call Manager

intelli-CTi Device Client

Active Call List [1]

Inbound 5551126652

[Daniel Thompson]
[Office Manager]
[Bike Boutique]

Ringing (00:02:10)

Inbound Call

Find Caller Search Results Create Caller

Select Caller:

Daniel Thompson
Bike Boutique

Job Title: Office Manager
E-mail: someone@example.com
Location: Snohomish, WA

intelli-CTi Inbound Caller Recognition

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



The screenshot shows the Dynamics CRM 'Active Contacts' list. A green arrow points from the 'CRM Contact List Dialing' text to the list. Another green arrow points from the 'Dynamics CRM Dialer' text to the 'Dynamics CRM Dialer' window. The dialer window shows a list of CRM entities, with 'Daniel Thompson' selected. Below the list, the dialer displays the selected entity's details, including phone numbers.

CRM Contact List Dialing

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

Dynamics CRM Dialer

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

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

Full Name	Email	Company Name
Cindy Dodd	someone@example.com	Curbside Sporting Goods
Connie Coffman	Someone@example.com	Discount Bikes
Connor Fearnor	Someone@example.com	Amazing Bikes
Daniel Thompson	daniel.thompson@bikebouttique.com	Bike Boutique
Darren Parker	Someone@example.com	Cheap n Best Bikes
Darrius Stasevicious	dstasevicious@amazingbikes.com	Amazing Bikes
David Campbell	someone@example.com	Speedy Bike Store
David Johnson	someone@example.com	Speedy Bike Store
David Jones	someone@example.com	Little Bicycle Supply Shop
David Liu	someone@example.com	Warm Bikes
David Martinez	someone@example.com	Fast and Fun Bikes
Edward Kyei	Someone@example.com	Real Estate Giants
Jack Morris	Someone@example.com	The Cracker Box

1 - 22 of 22 (1 selected)

Dial CRM Entity

- Daniel Thompson
- Ann Beebe
- Bob Smith
- Alex Litton

Dial: Daniel Thompson

- Business Phone (555) 321-1234
- Home Phone (555) 321-6789
- Mobile Phone (555) 112-6652

Dial

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

- ❖ Select the CRM entity you wish to dial from the list within Dynamics CRM 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 CRM



Microsoft Dynamics CRM | SALES | Contacts | Daniel Thompson

CONTACT
Daniel Thompson

Summary

CONTACT INFORMATION

Full Name*	Daniel Thompson
Job Title	Office Manager
Company Name	Bike Boutique
Email	daniel.thompson@bikebouttique.com
Business Phone	(555) 321-1234
Mobile Phone	(555) 112-6652
Fax	--
Preferred Method of	Any
Address	2601 Cambridge Drive Snohomish, WA 26367 U.S.

Active

CRM Contact Entity Dialing

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

Dynamics CRM Dialer

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

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

intelli-CTi Call Manager

intelli-CTi™

intelli-CTi Device Client

Active Call List [0]

Dynamics CRM Dialer

Dial CRM Entity

- Daniel Thompson
- Ann Beebe
- Bob Smith
- Alex Litton

Dial: Daniel Thompson

- Business Phone (555) 321-1234
- Home Phone (555) 321-6789
- 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 CRM



The screenshot shows the Microsoft Dynamics CRM web interface. The browser address bar displays the URL: <https://qgatecrmdemo.crm4.dynamics.com/main.aspx?Origin=Portal&page=Si>. The page title is 'Case: Brake lever damaged ...'. The navigation pane on the left shows 'Microsoft Dynamics CRM' and 'SERVICE' with a dropdown menu open showing 'Cases' and 'Brake lever damaged'. The main content area shows the case details for 'Brake lever damaged'. The case is in 'In Progress' status, created on 9/25/2014 at 8:57 AM. The 'Identify (Active)' step is highlighted. Below the case details, there is a 'Summary' section with 'CASE DETAILS' and a 'CUSTOMER DETAILS' section. The 'CASE DETAILS' section includes fields for Case Title, ID, Subject, Customer, Type, Origin, and Follow Up By. The 'CUSTOMER DETAILS' section includes fields for Company, Email, Mobile, and Business. The 'CUSTOMER DETAILS' section shows the customer's name as 'Daniel Thompson' and his contact information: Business Phone (555) 321-1234, Home Phone (555) 321-6789, and Mobile Phone (555) 112-6652.

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 CRM.

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

This approach applies to both CRM Cases and CRM Opportunities.

Dynamics CRM Dialer

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

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

The screenshot shows the Intelli-CTi Call Manager interface. The top bar displays 'Intelli-CTi Call Manager' and 'intelli-CTi™'. Below the bar, there is a section for 'intelli-CTi Device Client' showing 'Active Call List [0]'. The 'Dynamics CRM Dialer' window is open, displaying a list of CRM entities under the heading 'Dial CRM Entity'. The list includes 'Daniel Thompson', 'Ann Beebe', 'Bob Smith', and 'Alex Litton'. Below the list, there is a section for 'Dial: Daniel Thompson' showing contact information: Business Phone (555) 321-1234, Home Phone (555) 321-6789, and Mobile Phone (555) 112-6652. A 'Dial' button is visible at the bottom right of the dialer window.

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



Microsoft Dynamics CRM interface showing contact information for Daniel Thompson.

CONTACT Daniel Thompson

Summary

CONTACT INFORMATION

Full Name*	Daniel Thompson
Job Title	Office Manager
Company Name	Bike Boutique
Email	daniel.thompson@bikebouttique.com
Business Phone	(555) 321-1234
Mobile Phone	(555) 112-6652
Fax	--
Preferred Method of	Any
Address	2601 Cambridge Drive Snohomish, WA 26367 U.S.

CRM Contact Information

Show the CRM Contact information of the caller in your Microsoft Dynamics CRM

Brake lever damaged
Case: Created by Edward Kyei for Contact Daniel Thompson.
On Brake lever damaged's wall
Today

Daniel Thompson
Contact: Created By Edward Kyei.
On Daniel Thompson's wall
Today

Telephone Call Manager

Telephone call control providing the ability to manage the telephone call and capture notes during the call.

Dynamics CRM Call Assistant

In-Call assistant providing ready access to call related aspects of Dynamics CRM.

Manage and associate CRM entities to the call.

intelli-CTi Call Manager interface showing call details and CRM associations.

intelli-CTi™

intelli-CTi Device Client

Active Call List [1]

Inbound 5551126652

Daniel Thompson
Office Manager
Bike Boutique

Established 00:01:31

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.

Dynamics CRM Call Assistant

Call Associations:

Daniel Thompson
[Bike Boutique](#)

Brake lever damaged
CAS-01014-4PYQTT
Priority: Normal
Created on: 13 Jan 2010

Caller Content

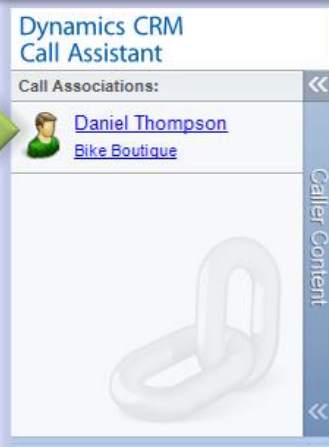
intelli-CTi In-Call Contact Management (Dynamics CRM Call Assistant)

- ❖ 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 CRM 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).

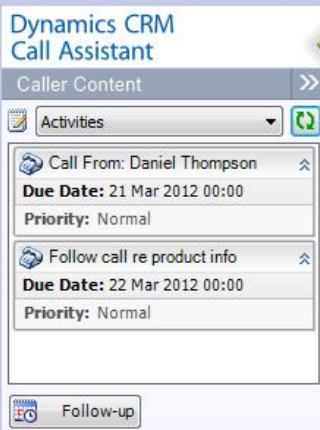
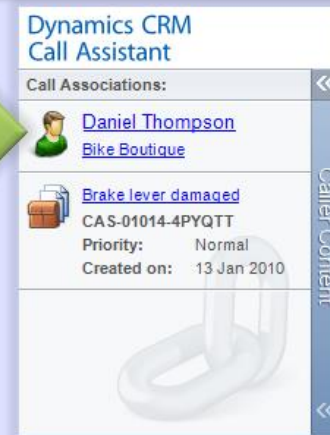


Caller Content

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

Call Assistant (Association View)

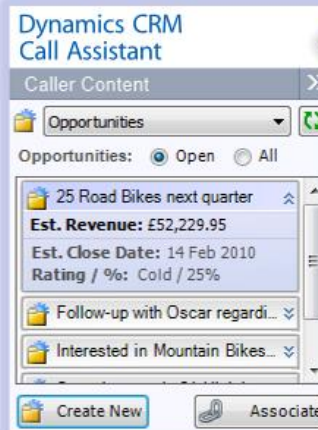
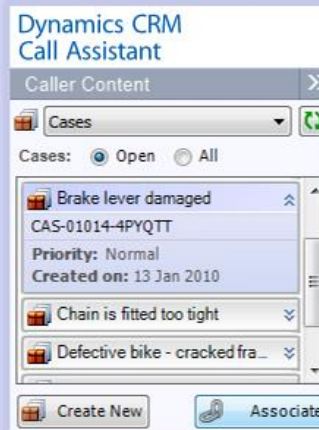
Once CRM content such as CRM Cases and/or CRM Opportunities have been associated to the call, these are then displayed in the Call Associations section.



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 CRM.



Call Assistant "Caller Content"

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

intelli-CTi – Microsoft Dynamics CRM Call Assistant

- ❖ Unique CRM call assistance capability to assist Dynamics CRM 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 CRM Call Wrap-up

Post each telephone call the Call Wrap-up dialog provides a summary of the call and the ability to further update and manage the telephone call within Microsoft Dynamics CRM.

CONTACT INFORMATION

Full Name* Daniel Thompson
Job Title Office Manager
Company Name Bike Boutique
Email daniel.thompson@
Business Phone (555) 321-1234
Mobile Phone (555) 112-6652

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 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)**
Call Started (Duration): **20 Aug 12:08 (00:00:02)**

Related Phone Call Activity

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.

After the call I contacted shipping and arranged for the replacement part to be shipped as soon as possible...

☒ Auto-complete existing activity

Create Follow-up **Manage in CRM**

Call Association(s):
 [Daniel Thompson, Bike Boutique](#)

Call Related Issue (CAS-01014-4PYQTT) [Remove Call Relationship](#)

Brake lever damaged

Priority:
Created on: 13 Jan
Status: Active

Resolve **Cancel** **Manage in CRM**

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 the CRM Activity/History.

intelli-CTi Call Manager

intelli-CTi™

intelli-CTi Device Client

Active Call List [0]

Inbound 5551126652

Idle Daniel Thompson
Office Manager
Bike Boutique

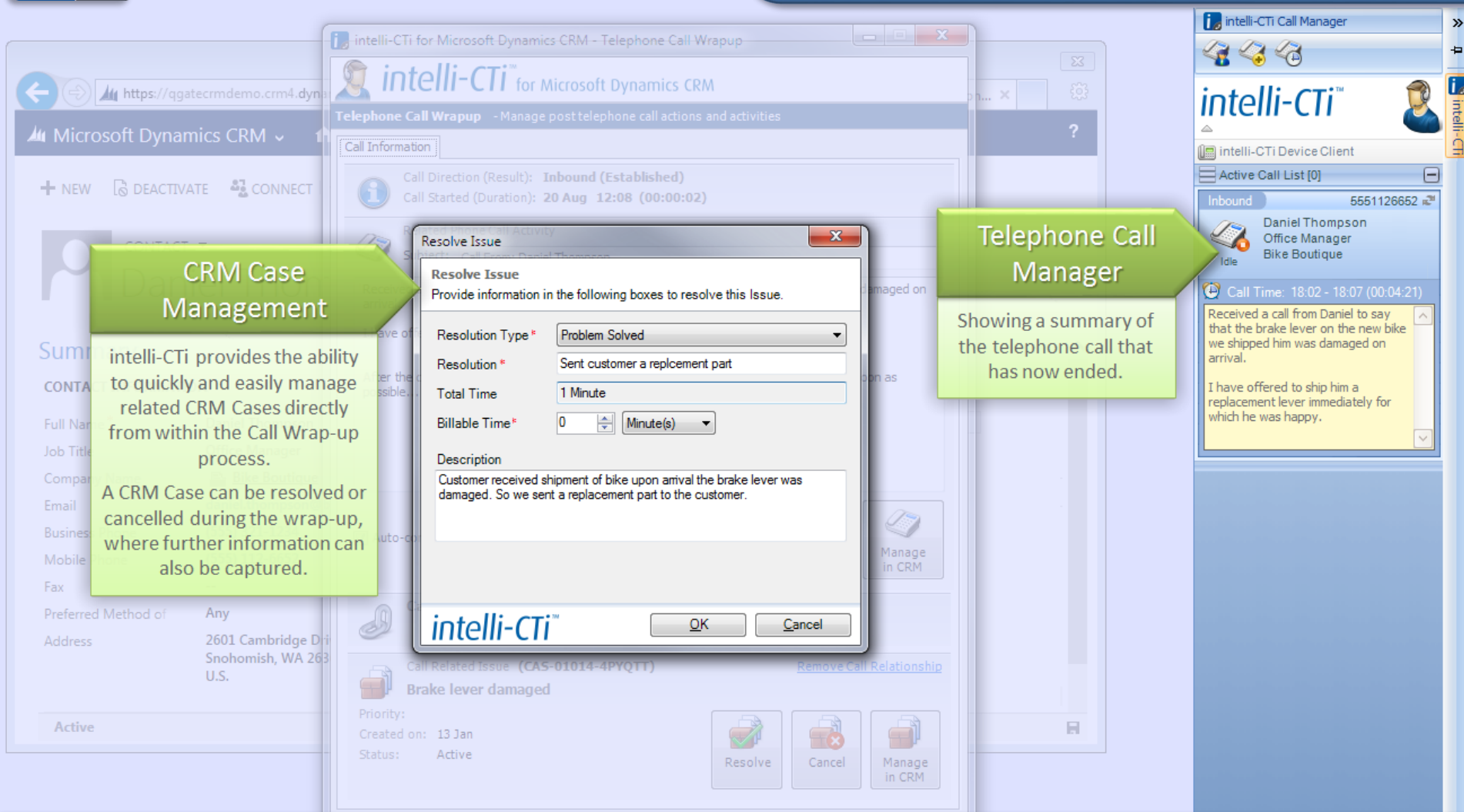
Call Time: 18:02 - 18:07 (00:04:21)

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

- ❖ 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

The screenshot displays the intelli-CTi for Microsoft Dynamics CRM interface. A central window titled 'Telephone Call Wrapup' is open, showing call details and a 'Resolve Issue' dialog box. The dialog box contains the following information:

- Resolution Type:** Problem Solved
- Resolution:** Sent customer a replacement part
- Total Time:** 1 Minute
- 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.

Two green callout boxes highlight key features:

- 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



✓	Subject	Call From	Call To	Regarding ↑	Direction	Activity Status
	Call To: Daniel Thompson	Edward Kyei	Daniel Thompson	Brake lever...	Outgoing	Completed
	Call To: Daniel Thompson	Edward Kyei	Daniel Thompson	Brake lever...	Outgoing	Completed
	Call To: Daniel Thompson	Edward Kyei	Daniel Thompson	Brake lever...	Outgoing	Completed
	Call To: Daniel Thompson	Edward Kyei	Daniel Thompson	Brake lever...	Outgoing	Completed
	Follow-up call to Daniel Thompson to confirm delivery	Edward Kyei	Daniel Thompson	Brake lever...	Outgoing	Completed
	Call To: Marc Collins Trading	Steve Blenkharn	Marc Collins Trading	case test	Outgoing	Completed
	Call From: Fearor	Connor Fearor	Steve Blenkharn	Connor Fea...	Incoming	Completed
	Call From: Fearor	Steve Blenkharn	Connor Fearor	Connor Fea...	Outgoing	Completed
	Call From: Fearor	Connor Fearor	Steve Blenkharn	Connor Fea...	Incoming	Completed
	Call To: Marc Collins Trading	Steve Blenkharn	Marc Collins Trading	Customer S...	Outgoing	Completed
	Call To: Marc Collins Trading	Steve Blenkharn	Marc Collins Trading	Customer S...	Outgoing	Completed
	Call To: Marc Collins Trading	Steve Blenkharn	Marc Collins Trading	Customer S...	Outgoing	Completed
	Call From: Daniel Thompson	Daniel Thompson	Edward Kyei	Daniel Tho...	Incoming	Open

1 - 50 of 120 (0 selected) Page 1

CRM Activity Management

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

Phone Call List

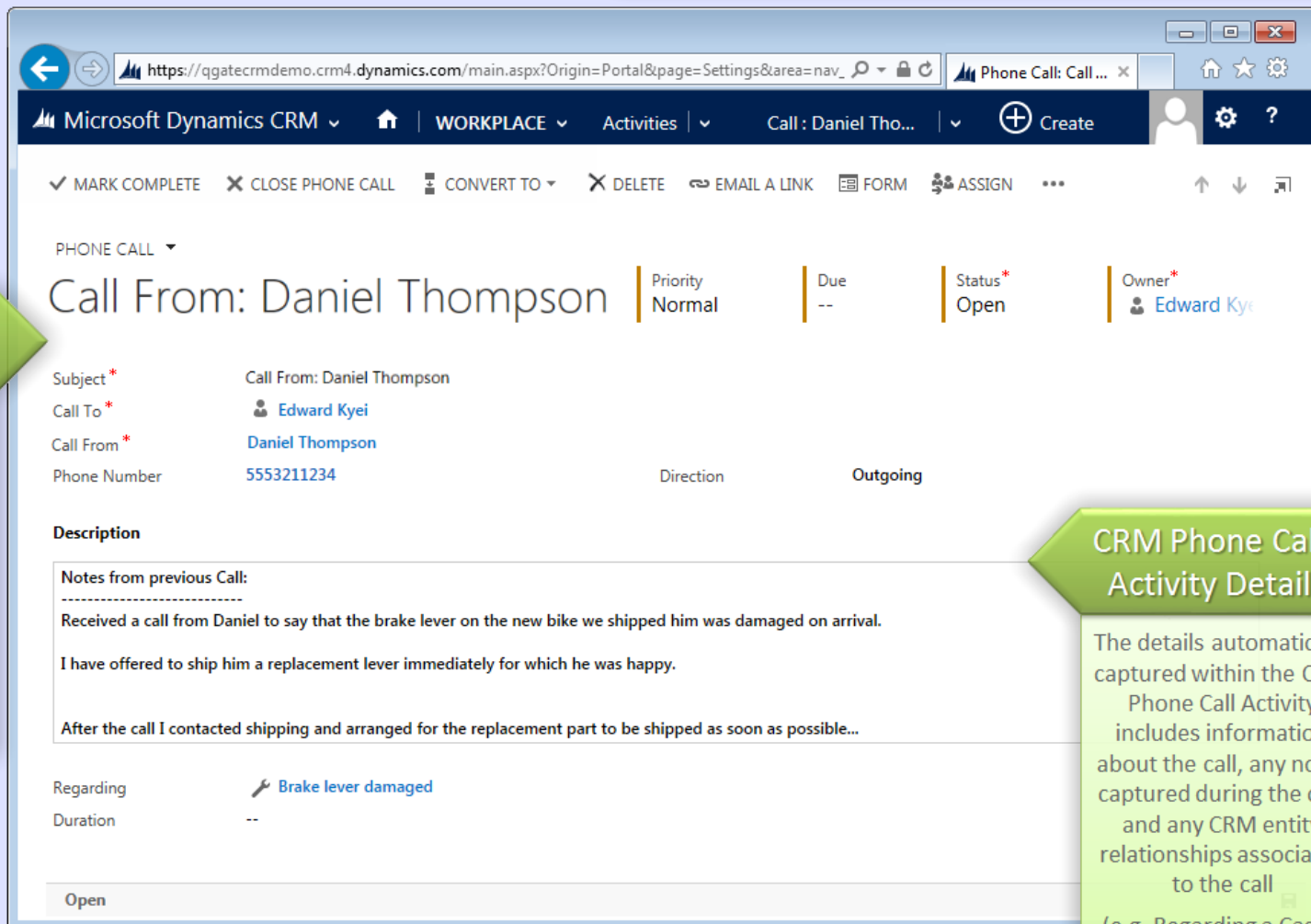
Here shows a complete list of telephone calls made and received to a CRM entity (Contact). This activity list is automatically achieved through the call management of intelli-CTi.

intelli-CTi Telephone Call Activity Management in Microsoft Dynamics CRM

- ❖ Automatically capture every telephone call as a single CRM Activity/History item within Dynamics CRM
- ❖ 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 CRM Activity/History, against each of the CRM entities the telephone call relates to (e.g. CRM User, Account, Contact, Lead, Opportunity, Ticket etc.).



The screenshot shows the Microsoft Dynamics CRM interface for a 'Phone Call' activity. The browser address bar shows the URL: https://qgatecrmdemo.crm4.dynamics.com/main.aspx?Origin=Portal&page=Settings&area=nav_. The page title is 'Phone Call: Call ...'. The navigation bar includes 'Microsoft Dynamics CRM', 'WORKPLACE', 'Activities', and 'Call : Daniel Tho...'. The main content area shows the details of a phone call from Daniel Thompson to Edward Kyei. The call is marked as 'Outgoing' with a priority of 'Normal' and a status of 'Open'. The description field contains notes from the previous call, including a report of a damaged brake lever on a new bike and the offer of a replacement lever. The 'Regarding' field is set to 'Brake lever damaged'.

Subject *	Call To *	Call From *	Phone Number	Direction	Outgoing
Call From: Daniel Thompson	Edward Kyei	Daniel Thompson	5553211234		


Description

Notes from previous Call:

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.

After the call I contacted shipping and arranged for the replacement part to be shipped as soon as possible...

Regarding:  Brake lever damaged

Duration: --

Open

CRM Phone Call Activity Detail

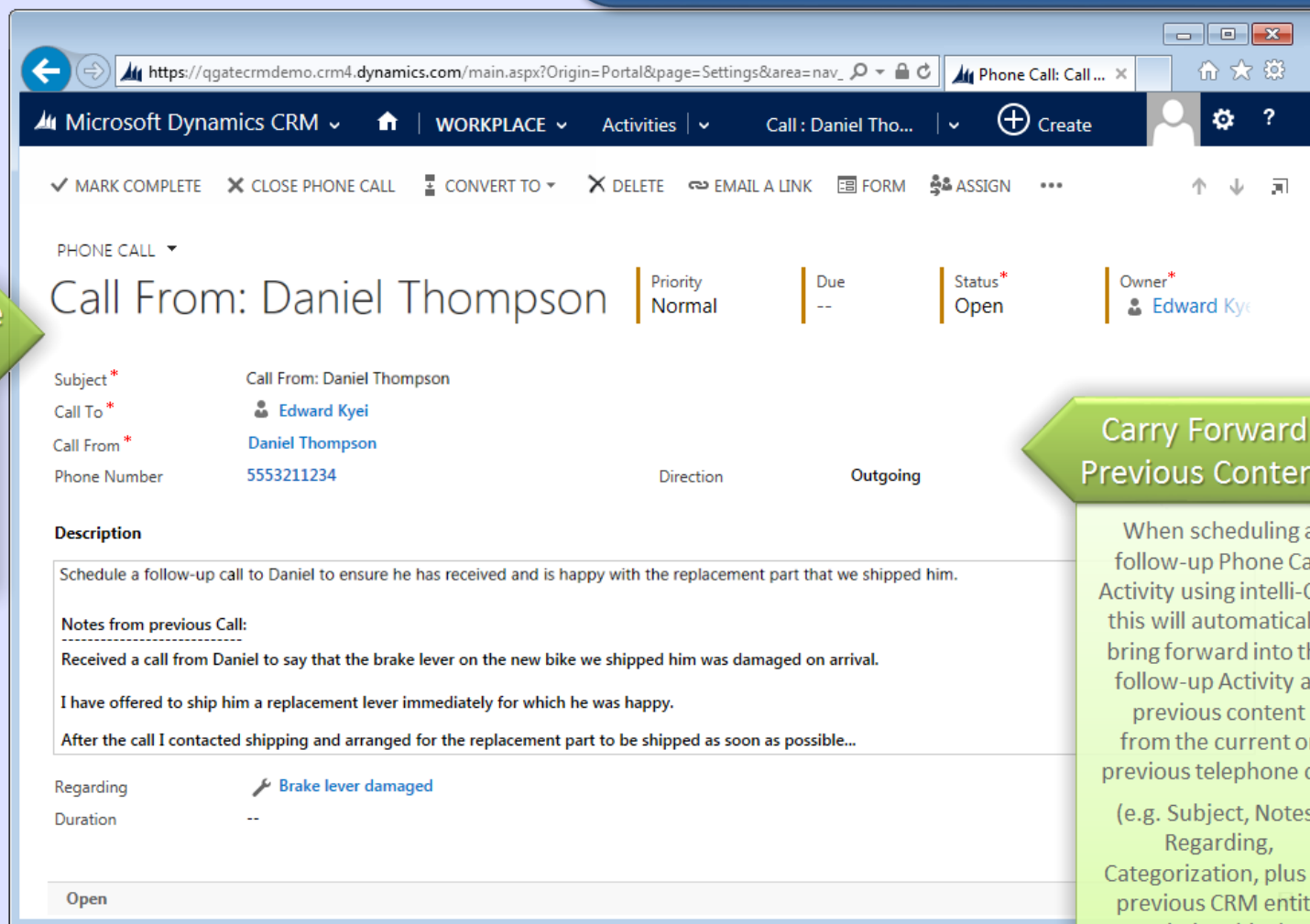
The details automatically captured within the CRM Phone Call Activity includes information about the call, any notes captured during the call, and any CRM entity relationships associated to the call (e.g. Regarding a Case).

intelli-CTi Telephone Call Activity Management in Microsoft Dynamics CRM

- ❖ 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 CRM

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 CRM.



The screenshot shows the Microsoft Dynamics CRM interface for a Phone Call activity. The browser address bar shows the URL: https://qgatecrmdemo.crm4.dynamics.com/main.aspx?Origin=Portal&page=Settings&area=nav_. The page title is "Phone Call: Call ...". The activity is titled "Call From: Daniel Thompson". The priority is "Normal", the due date is "--", the status is "Open", and the owner is "Edward Kyei". The subject is "Call From: Daniel Thompson", the call to is "Edward Kyei", the call from is "Daniel Thompson", and the phone number is "5553211234". The direction is "Outgoing". The description is "Schedule a follow-up call to Daniel to ensure he has received and is happy with the replacement part that we shipped him." The notes from the previous call are: "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. After the call I contacted shipping and arranged for the replacement part to be shipped as soon as possible...". The regarding field is "Brake lever damaged" and the duration is "--". The activity is currently in the "Open" state.

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 CRM

- ❖ 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



Call History Associated View

CALL HISTORY

Related Call History

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.)

Call History (for Contact)

A complete list of intelli-CTi Call History for a CRM Contact.

End Time	Subject	Call Duration	Call Direction	Call Result	Case
9/25/2014 5:58 AM	Call To: Daniel Thompson	00:00:07	Outbound	Established	Brake lever da...
9/25/2014 5:48 AM	Call To: Daniel Thompson	00:00:11	Outbound	Established	Brake lever da...
9/25/2014 5:33 AM	Call To: Daniel Thompson	00:01:23	Outbound	Established	Brake lever da...
9/25/2014 5:30 AM	Call To: Daniel Thompson	00:00:06	Outbound	Established	Brake lever da...
9/25/2014 5:29 AM	Call To: Daniel Thompson	00:00:29	Outbound	Established	Brake lever da...
9/25/2014 5:28 AM	Call To: Daniel Thompson	00:04:14	Outbound	Established	Brake lever da...
9/25/2014 5:23 AM	Call From Daniel Thompson	00:00:33	Inbound	Established	Brake lever da...
9/25/2014 5:21 AM	Call To: Daniel Thompson	00:00:38	Outbound	Established	Brake lever da...
9/25/2014 5:20 AM	Call To: Daniel Thompson	00:00:34	Outbound	Established	Brake lever da...
9/25/2014 5:15 AM	Call To: Daniel Thompson	00:15:24	Outbound	Established	Brake lever da...

intelli-CTi "Call History"

For each CRM entity that relates to 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 CRM
- ❖ 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 CRM of each telephone call made or received, relating to one or more CRM entities.

Microsoft Dynamics CRM

SALES

Contacts

Call To: Daniel Tho...

Create

NEW

DEACTIVATE

DELETE

ASSIGN

SHARE

EMAIL A LINK

RUN WORKFLOW

CALL HISTORY : INFORMATION

Call To: Daniel Thompson

Call Relationships

Account	Bike Boutique	Lead	--
Contact	Daniel Thompson	Phone Call	--
Case	Brake lever damaged	Opportunity	--

Call Notes

Subject*

Call To: 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.

After the call I contacted shipping and arranged for the replacement part to be shipped as soon as possible...

Owner*

[Edward Kyei](#)

Created By

[Edward Kyei](#)

Call Timings

Start Time	9/25/2014 5:58 AM	Ring Time	00:00:08
End Time	9/25/2014 5:58 AM	Call Duration	00:00:07
Wrapup Time	00:01:39	Wrapup Date	9/25/2014

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 valuable data for auditing, reporting and analysis.

intelli-CTi Call History Tracking – History Item

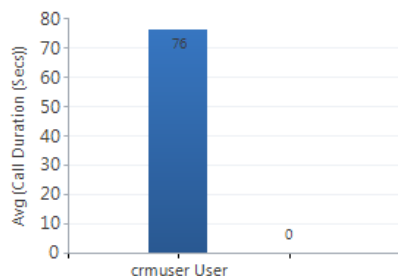
- ❖ CRM Relationships: relating to the call such as Accounts, Contacts, Users, Cases and Opportunities
- ❖ Call Notes: the subject of the call and any notes captured during the call
- ❖ Call Statistics: include the timings of the call, call duration, call direction and call result



intelli-CTi - Operational ▾

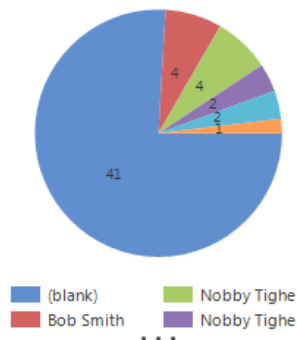
Average Call Duration (Secs) by User

Inbound Calls



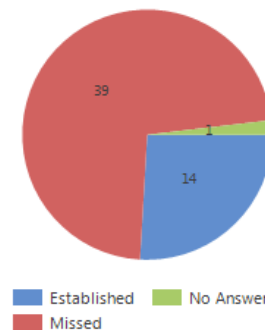
Top 10 Contacts

Active Call History



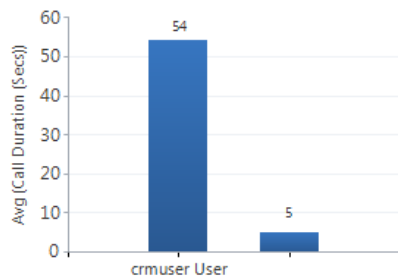
Call Results

Active Call History



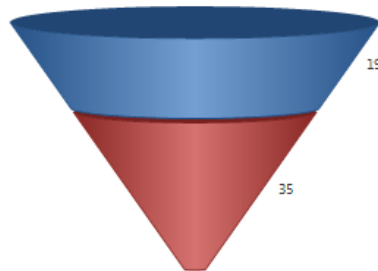
Average Call Duration (Secs) by User

Outbound Calls



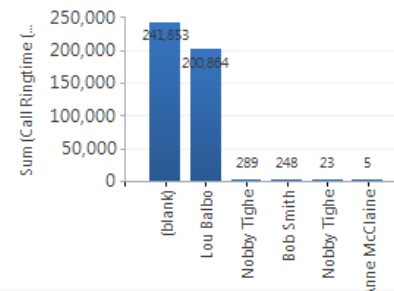
Most calls by User

Active Call History



Top 15 - Longest call times

Active Call History

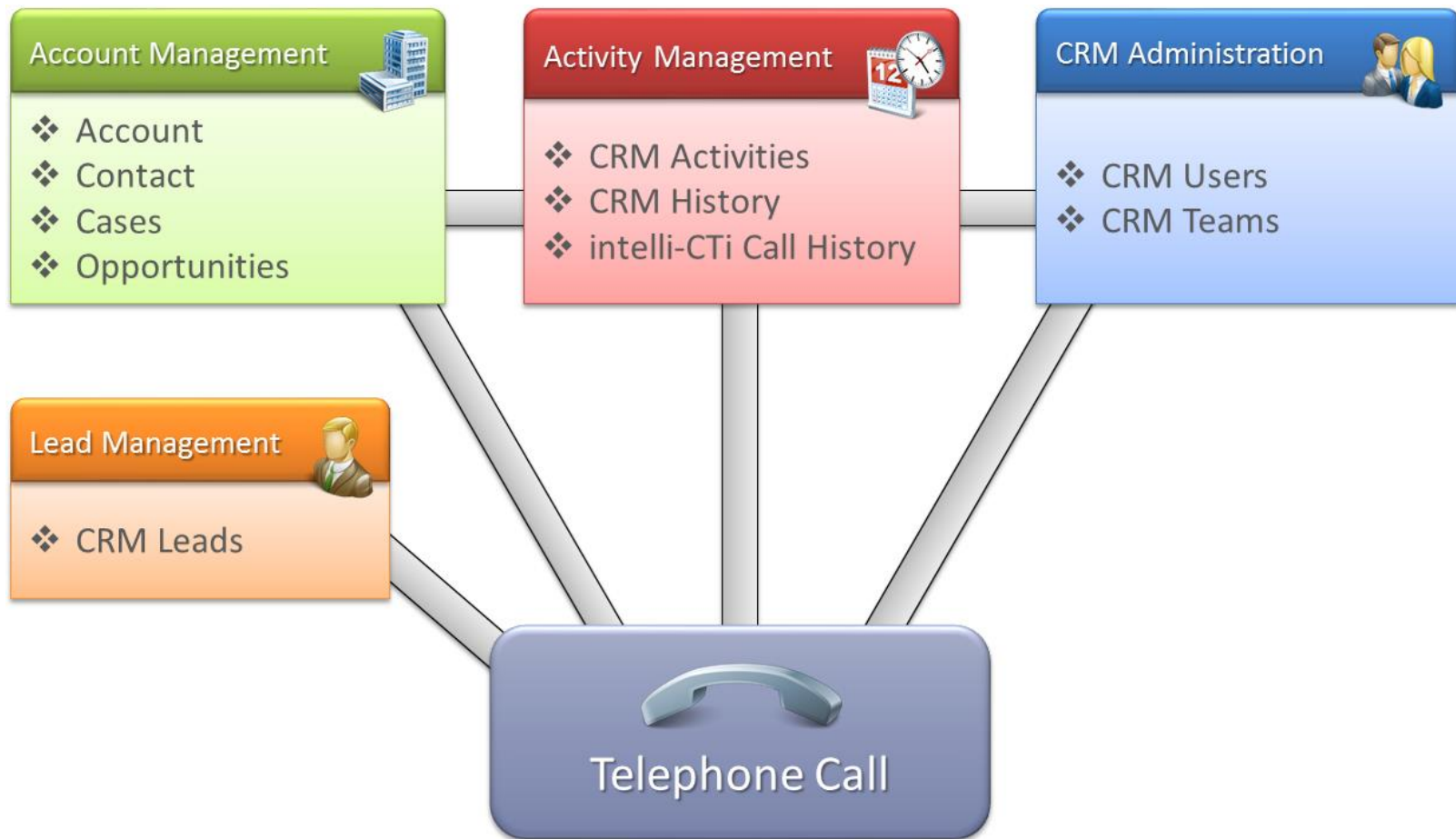


intelli-CTi
Dashboard
Reporting

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

intelli-CTi Microsoft Dynamics CRM 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 CRM 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*TM
for Microsoft Dynamics 365
With Microsoft Unified Service Desk



Microsoft Dynamics CRM - Unified Service Desk

Unified Service Desk | DASHBOARD | MY WORK | SEARCH | REMINDERS

Dashboard (Global)

intelli-CTi - Operational Performance

Average Call Duration (Secs) by User
Inbound Calls

User	Avg Call Duration (Secs)
crmuser User	67
Marc Collins	0

Active Call History

Top 10 Contacts

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 CRM system.

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

intelli-CTi Call Manager

intelli-CTi Device Client

Active Call List [1]

Inbound 02392550135

[Daniel Thompson]
[Office Manager]
[Bike Boutique]

Ringing (00:00:33)

Inbound Call

Find Caller | Search Results | Create Caller

Select Caller:

[Daniel Thompson](#)
[Bike Boutique](#)

Job Title: Office Manager
E-mail: Daniel.Thompson@BikeBo...
Location: Hants

Call Results
Active Call History

Average Call Duration (Secs) by User
Outbound Calls

60 | 54

Avg Case Resolution Time (Sec) : 1157 | Number Of Cases Resolved : 6 | CSAT : 2

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



Microsoft Dynamics CRM - Unified Service Desk

Unified Service Desk DASHBOARD MY WORK SEARCH REMINDER ...

Abbott Ltd.-USA Account Graphics-USA **Bike Boutique-UK** x

General Social Info

Account Name: Bike Boutique

Email: Phone: 02392 550135 Primary Contact: Daniel Thompson

CALL SCRIPT

Welcome to Account Session

Welcome Bike Boutique. Thank you for contacting Woodgrove Bank. My name is crmuser. How can I help you today?

Identify contact
New service request
Existing service request

Notes Associated Contact **Associated Cases**

Search for records

Include: Related "Regarding" f

Page 1

57 Number Of Cases Resolved : 6 CSAT : 2 Session Time 00:02:20

Dashboard (Global) Bike Boutique-UK **Contact**

Activities

SALES Contacts Daniel Thompson

+ NEW DEACTIVATE CONNECT | ...

CONTACT

Daniel Thompson

Summary

CONTACT INFORMATION

Full Name*	Daniel Thompson
AKA	--
Job Title	Office Manager
Company Name	Bike Boutique
Email	Daniel.Thompson@BikeBoutique.demo
Business Phone	02392 550135
Mobile Phone	--
Fax	--
Preferred Method of	Email

Active

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.

intelli-CTi Screen Pop Inside USD

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

intelli-CTi Call Manager

intelli-CTi Device Client

Active Call List [1]

Inbound 5551126652

Established 00:01:31

Daniel Thompson
Office Manager
Bike Boutique

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.

Dynamics CRM Call Assistant

Call Associations:

Daniel Thompson
Bike Boutique

Brake lever damaged
CAS-01014-4PYQTT
Priority: Normal
Created on: 13 Jan 2010

Caller Content

The Unified Service Desk

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



Microsoft Dynamics CRM - Unified Service Desk

Unified Service Desk DASHBOARD MY WORK SEARCH REMINDER...

Abbey Barrow-Los Angeles

Dashboard (Global) Abbey Barrow-Los Angeles

Activities

SALES Contacts Abbey Barrow

+ NEW DEACTIVATE CONNECT ADD TO MARKETING LIST ASSIGN EMAIL A LINK DELETE

CONTACT
Abbey Barrow

Summary

CONTACT INFORMATION

Full Name* Abbey Barrow

ADS
Abbey.Barrow@ADS.demo
(555) 530-2622

Any

POSTS ACTIVITIES NOTES

Enter post here

Both Auto posts User posts

Abbey Barrow
Contact: Created By Marc Collins.
On Abbey Barrow's wall
17/01/2014 09:28

57 Number Of Cases Resolved : 6 CSAT : 2 Session Time 00:00:20

**Dynamics CRM
Dialer**

The Dynamics CRM Dialer provides a list of CRM entities based upon the context of what is currently on display within Dynamics CRM/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 CRM/USD will provide the ability to dial that CRM entity using intelli-CTi

intelli-CTi Call Manager

intelli-CTi™

intelli-CTi Device Client

Active Call List [0]

Dynamics CRM Dialer

Dial CRM Entity

- Abbey Barrow
- ABC Hardware Corp.
- Daniel Thompson
- Account Graphics

Dial: Abbey Barrow

Business Phone (555) 530-2622

Dial

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*TM

for Microsoft Dynamics 365