

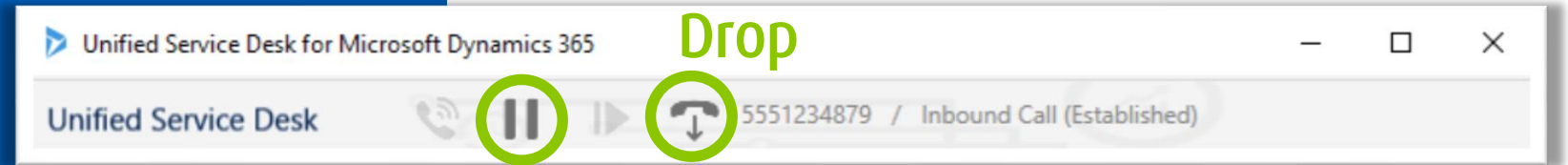


*intelli-CTi*TM
for Unified Service Desk

Product Tour

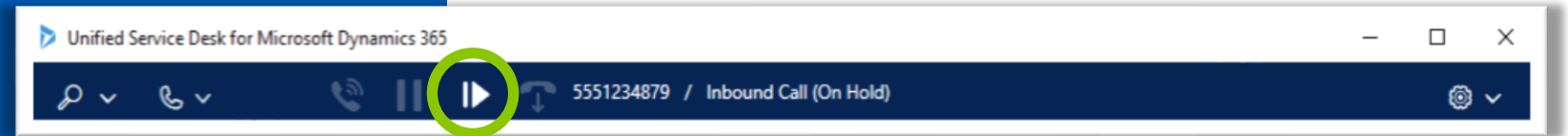
intelli-CTi's Embedded Controls

- Multiple call support
- Color themes
- Hold capability

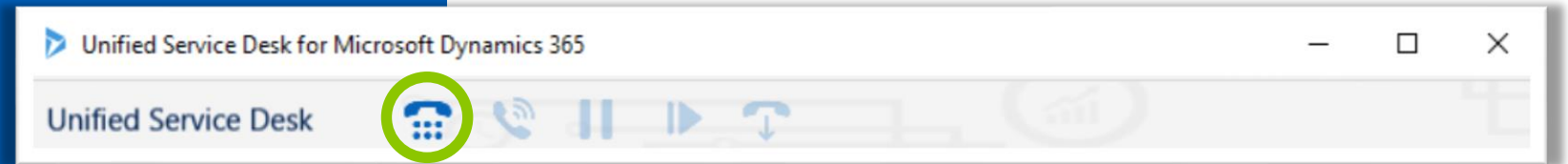


Drop

Hold



Resume



Dial

Answer



On receiving an inbound call...

- Pick up your call using the seamlessly embedded controls in the USD toolbar

Unified Service Desk for Microsoft Dynamics 365

5551234879 / Inbound Call (Incoming)

My Work (Global) x

Customer Service Dashboard v

Cases By Priority (Per Day)

My Active Cases Opened in the Last 7 days

Day (Created On)	Count-All (Case)
1/15/2019	1

Legend: Normal

Case Mix by Origin

My Active Cases

Origin	Count
(blank)	71
Email	5
Phone	10
Web	8

Legend: (blank), Email, Phone, Web

AHT: 317 Sessions: 3 Resolved Cases: 0

Screen-Pop

- intelli-CTi searches your USD database for the caller and pops the customer record to your screen if there is a single match found

The screenshot displays the Unified Service Desk interface for Microsoft Dynamics 365. The window title is "Unified Service Desk for Microsoft Dynamics 365". The top navigation bar shows "01703533407 / Inbound Call (Established)". The main content area is divided into several sections:

- Contact (A Doreen)**: A tab at the top left.
- Contact(A Doreen) | Phonecall (A Doreen) | Account(M.G.K)**: A sub-navigation bar.
- Contact: A Doreen**: A card showing contact details: Email: A.Doreen@M.G.K.demo, Phone: (01703) 533 407.
- CALL SCRIPT**: A section with a dropdown menu set to "Contact Verification Agent Script". Below it, a message reads: "It is important to check we are speaking to the correct contact! All answers MUST be confirmed before progressing to next stage."
- Instructions**: A section titled "Answer ALL answers:" with three items: "Name : A Doreen", "Date of Birth : Unknown!", and "Post Code : M2 6DS".
- Notes**: A section with a text input field labeled "Enter notes here...".
- CONTACT INFORMATION**: A table displaying contact details:

CONTACT INFORMATION	
Full Name *	A Doreen
Job Title	--
Account Name	M.G.K
Email	A.Doreen@M.G.K.demo
Business Phone	(01703) 533 407
Mobile Phone	--
Fax	--
Preferred Method of C	Any

At the bottom of the interface, a status bar shows "Active" and "Session Time 00:01:05".

A green circle highlights the "CONTACT" dropdown menu in the top right corner, and a green arrow points to it from the right.

QGate's Telephony Number System (TNS)

- You are given a choice of records to associate your call when **multiple record matches** are found
- Our unique TNS significantly improves your match rate by recognising multiple phone number formats within records

Unified Service Desk for Microsoft Dynamics 365

5178531214 Inbound Call (Established)

New Session x

5178531214

Phonecall () QGate Search

Accounts

ABC Company

George Burns

Contacts

Colin Rolley
QGate Software
East Lansing

Jason Stowe
QGate Software

Michelle Bowers
QGate Software

0(5178) - 53 - 12 - 14

00 517853121 - 4

+44 5178 531214

AHT: 193 Sessions: 17 Resolved Cases: 0 Session Time 00:00:36

Click-To-Dial

- Quickly and easily dial out by clicking any phone number field in USD

Unified Service Desk for Microsoft Dynamics 365

5178531214 / Outbound Call (Established)

Contact (Colin Rolley)

Contact(Colin Rolley) Account(QGate Software)

CONTACT

Colin Rolley

Owner*
QGate Software

Summary

CONTACT INFORMATION	
Full Name *	Colin Rolley
Job Title	--
Account Name	QGate Software
Email	--
Business Phone	(517) 853-1214
Mobile Phone	--

POSTS ASSISTANT ACTIVITIES NOTES

Enter post here

POST

All posts Auto posts User posts

Colin Rolley
Contact: Created By QGate Software.
On Colin Rolley's wall
12/21/2018 6:31 AM

Company
QGate Software

Insights

Insights setup has not been completed. Please contact your CRM Administrator.

[Insights organizational settings](#)

AHT: 0 Sessions: 0 Resolved Cases: 0 Session Time 00:01:54