

Version	Details
4.2.0	<p data-bbox="338 412 730 443">Release Date: September 2019</p> <p data-bbox="338 461 453 488">Features</p> <ul data-bbox="357 501 1197 891" style="list-style-type: none">• Refreshed User Interface (UI), with closer synergy to Dynamics 365• Added support for OAuth and Multi-Factor Authentication (MFA)• Added support for Click to Dial from directly within Dynamics 365• Added support for RingCentral telephony• Added new phone “built it yourself” integration option• Added ability to store Call Disposition/Outcome on Call Wrap-up• Compatible with Dynamics 365 Unified Interface (UI)• Added new interactive help and tutorials• Uses intelli-CTi v4.2• Uses Breeze v4.2 <p data-bbox="338 909 411 936">Fixes</p> <ul data-bbox="357 949 1283 1308" style="list-style-type: none">• Removed enforced “+” telephone number prefix for Create Caller• Resolved case format issue for username during authentication• Resolved issues of client open connections• Resolved error when browsing to Dynamics 365 “Create New” entity pages• Resolved Go Integrator Call Transfer notifications• No longer requires intelli-CTi to start after Go Integrator• Updated Gamma Horizon support• Updated to .NET v4.6.2• Withdrawn Dynamics CRM 2013 compatibility

Previous Version History

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4.1.0	<p>Release Date: July 2018</p> <p>Features</p> <ul style="list-style-type: none">• Hosted intelli-CTi System Management Console:<ul style="list-style-type: none">○ Available for customers using specific hosted telephony systems only (e.g. Skype for Business, BroadWorks, etc.)○ Multi-tenanted with automated backups• Support for Dynamics 365 “v9” (Web forms and Unified Client Interface)• Support for USD v3.3• Ability to Re-associate the current call• Auto-associate Caller on single match (configurable option, ON by default)• Now stores the underlying vendor (PBX) Call Id in Call History• Updated CRM Service Manager (branding, removal of legacy options)• intelli-CTi Server Admin Client re-branded to “intelli-CTi Management Console”• Uses QGate intelli-CTi v4.1.0• Uses QGate Breeze v4.0.1 <p>Fixes</p> <ul style="list-style-type: none">• Named User Licence management limitation• For 4K/Large Fonts and multiple display resolutions• Significant performance improvements to CRM/D365 integration (initial loading, first call, general use)• USD Dialler (previously didn’t react until after the first call)• Chrome performance issues (after opening new browser tabs)• Issue where Entity Display Field configuration could become corrupt.• Call notes not being written to Phone Call activity when Call Wrap-up dismissed by clicking [X]• Incorrect time zone values for Phone Call activity records

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4.0.1	<p>Release Date: October 2017</p> <p>Features</p> <ul style="list-style-type: none"> • Now requires .NET Framework 4.6.2 (or above) • Uses intelli-CTi v4.0 (Subscription/Concurrent licence support, and much more). • Redesigned intelli-TNS support (more flexible/customizable Call Recognition) • Telephone fields for Call Recognition matching can now be configured in settings. • Telephone fields for CRM Dialer can now be configured in settings. • Display fields for Call Recognition matches can now be configured in settings. • Call History records are now editable using new CRM form. • Now adds a "+" to start of captured number when creating CRM entities. • Added support for new CRM Service Regions (UK, Germany). • Removal of support for Microsoft Dynamics CRM 2011. • Uses QGate intelli-CTi v4.0 • Uses QGate Breeze v4.0 <p>Fixes</p> <ul style="list-style-type: none"> • Chrome browser integration performance improved. • Improved application start-up time/"first call" performance. • Resolved issue when dialing from closed Activities. • Fixed date/time display issue on Call Wrap-up. • Fixed sample CRM Dashboard charts "record count exceeded". • Fixed issue where Call History start/end times had incorrect time zone offset.
1.7.0	<p>Release Date: November 2016</p> <p>Features</p> <ul style="list-style-type: none"> • Added preliminary support for Dynamics 365 • Now requires .NET Framework 4.5.2 (or above) • Added support for new CRM Service Regions (Canada, India) • Major performance improvement of TNS Data Loader sync operation • Uses QGate intelli-CTi v2.10 • Uses QGate Breeze v1.6 <p>Fixes</p> <ul style="list-style-type: none"> • Reduced resource usage for CRM client browser integrations • Added support for popup windows when using Outlook CRM 2016 • CRM Dialer now reacts even if Phone Call activity has no Sender/Receiver • Create Opportunity functionality now populates [ParentAccountId] (if applicable)

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1.5.0	<p>Release Date: December 2014</p> <p>Features</p> <ul style="list-style-type: none"> • Added support for Chrome client integration. • Added support for Microsoft Dynamics CRM 2015. • Added (initial) support for Unified Service Desk (USD) client integration. • Updated "intelli-CTi User" security role to have ALL permissions req. to function • Uses QGate intelli-CTi v2.9.1 • Uses QGate Breeze v1.5.2 <p>Minor improvements & Fixes</p> <ul style="list-style-type: none"> • Added missing dividers for Call Associations • Force wrap-up to stay on top. • Extension numbers not being stripped from TNS processed entries.
1.4.3	<p>Release Date: September 2014</p> <p>Features</p> <ul style="list-style-type: none"> • Now uses QGate Breeze v1.5.2 <p>Minor improvements Fixes</p> <ul style="list-style-type: none"> • Now only updates the Machine-level config if there's been a change (previously could cause errors for non-admin users with UAC enabled). • Improvements to auto-prompt for missing information process on start-up. • Minor improvements to Outlook CRM integration. • Fixed inconsistency of updating Phone Call activity when associating Cases and Opportunities.
1.4.2	<p>Release Date: August 2014</p> <p>Features</p> <ul style="list-style-type: none"> • Outlook 2007 – 2013 (32-bit and 64-bit) support. • Now auto-prompts for CRM credentials if authentication fails on start-up. • Allows for Server URL override for CRM connections. • Now sets CRM 2013 as the default version for new CRM connections. <p>Fixes</p> <ul style="list-style-type: none"> • Issue where CRM connection was lost due to session expiry (now auto-renews). • Issue where PhoneCall was not being linked in Call History (in CRM 2013) • CRM authentication errors are now more "user-friendly". • Now alerts user if Internet Explorer client is in a different CRM Organization.

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1.4.0	<p>Release Date: October 2013</p> <p>Features</p> <ul style="list-style-type: none"> • Now supports integration with CRM 2013 • No longer compatible with CRM 4 • Windows 8 compatible (Desktop mode only) • Improved compatibility for “Polaris” release of MS Dynamics CRM. • Using new “extensions” structure for Solution customisations (simplifies customisation development). • Now truly silent install (inc. command switch for Outlook add-in) • Auto-prompts for "personalisation" settings (e.g. Username/Password) • Now stores Service Connections within the Breeze service config (previously stored separately - at user/AppData-level) • Updated Service Manager - Now uses MS Online Portal authentication by default • When creating a new Contact (e.g. for an Incoming call), it will no longer default to also create a parent Account • Dialing from an Opportunity will use the associated Contact (if present), failing that it will use the associated Account • Improved logging in Outlook CRM add-in to include roll-over support (1 log, 2 backups, max 100k size) • Now uses QGate intelli-CTi v2.9.0 • Now uses QGate Breeze v1.5.0 <p>Fixes</p> <ul style="list-style-type: none"> • Updated UI to reflect when Medium (125%) display is enabled • Issues with non-English CRM installations • Call Qualification windows being orphaned if call ended before results shown • Improve installer's ability to install Windows Identify Foundation (WIF) (except for Windows 8, which is a Windows “Feature” that needs to be enabled) • Issue of Outbound call being pre-qualified with last call details • Call Wrap-up failing when dialing from an Opportunity • Support for dialing from Activities from within Outlook CRM • Intermittent "SecurityException: The source was not found, but some or all event logs could not be searched" (permissions issue) • Fixed create Account/Contact/Lead logic • Resolved potential “No suitable CRM client found” (disconnected) scenario with Outlook CRM integration

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1.3.2	<p>Release Date: April 2013</p> <p>Features</p> <ul style="list-style-type: none"> • Added compatibility for “Polaris” release of MS Dynamics CRM. • MS Outlook integration add-in now installs for all users. <p>Fixes</p> <ul style="list-style-type: none"> • Call Wrap-up would not appear if call was associated with an Opportunity. • Issue resolving Cases from Wrap-up screen.
1.3.0	<p>Release Date: October 2012</p> <p>Features</p> <ul style="list-style-type: none"> • Requires .NET Framework 4.0. • Added compatibility for Dynamics CRM hosted by Microsoft Online Services. • Now uses Microsoft XRM SDK for Dynamics CRM integration. • Entity type name is now being used from Metadata (to reflect customisations). • Using latest User Interface controls. • TNS Data Loader now remembers last sync timestamp.
1.2.4	<p>Release Date: 24th July 2012</p> <p>Features</p> <ul style="list-style-type: none"> • Now allows multiple instances of Call Qualification control (auto-collapses existing controls to save space). • (SDK) CreateDiallerContents() now uses Dynamic Entities (and putting entity obj into .Tag). • (SDK) Solution project includes (commented out) sample code for call filtering. <p>Fixes</p> <ul style="list-style-type: none"> • Withheld numbers no longer matching all entities. • Fixed issue where updates to CallContext were not consistently pushing updates to the actual Call Tag ("LegacyCallTag1"). • Now gets entity data safely (returning blank strings if applicable). • Now does [Suspected] caller display for Leads.

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1.2.3	<p>Release Date: 24th July 2012</p> <p>Features</p> <ul style="list-style-type: none"> • (SDK) Added .Tag property to CrmEntityData type to store Dynamic Entities. <p>Fixes</p> <ul style="list-style-type: none"> • Uses latest version of Service Manager, which now allows for Secured Connections (HTTPS/SSL) in On-Premise mode. • Limits the maximum number of results to return.
1.2.2	<p>Release Date: 5th July 2012</p> <p>Features</p> <ul style="list-style-type: none"> • Added ability to disable CRM Dialler and “auto-close” on telephone call start. • Added ability to disable “auto-open” of entity details on Call Qualification. <p>Fixes</p> <ul style="list-style-type: none"> • Now finds only ACTIVE entities for Call Qualification (both Auto-lookup and Manual find). • Improved integration with IE. • Fixed “sorting” issue with saved Dynamics CRM connection list.
1.2.1	<p>Release Date: April 2012</p> <p>Fixes</p> <ul style="list-style-type: none"> • Context detection issue in Outlook CRM (4 & 2011). • Pop-up window context issue in Outlook CRM 2011. • Context detection of lists of Cases, Opportunities in Outlook CRM 2011 (Outlook 2007 only). • Call qualifying against Accounts incorrectly setting CallInfo to <blank>. • Issue when Outlook CRM (2011) is opened before Breeze, unable to automate Outlook until next context notification. • Possible issue when trying to update a closed PhoneCall activity on wrap-up. • Re-built CRM4 Customisations.

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1.2.0	<p>Release Date: March 2012</p> <p>Features</p> <ul style="list-style-type: none"> • Microsoft Dynamics CRM integration now reports context from (sub)grids within entity popup windows. • Outlook CRM 2011 Add-in now supports context in popups (and also changes context on focus). • Removed need for Browser Helper Objects (BHO), now using global IE Hook. • Improved CRM Dialler (shows multiple contexts, rolling history, toggled visibility via toolbar button). • CRM Dialler now supports dialling from existing Cases, Opportunities, Phone Call activities. • Improved Call Wrap-up (Related Case/Opp/PhoneCall) with ability to close Case. • New feature: Call Assistant – provides instant access to related data for the current caller along with quick actions. • Call Qualify now searches across Account, Contacts and Leads (configurable) and can also be enabled or disabled. • Call Qualify has improved display for match results, with expandable content for more information. • Call Qualify now allows manual find to qualify Account, Contacts and Leads. • Call Qualify now allows quick creation of Account, Contacts and Lead for caller qualification. • Product now employs a pluggable architecture to allow for customised solutions. <p>Fixes</p> <ul style="list-style-type: none"> • TNS Data Loader now uses paging to avoid time-outs when processing large volumes of data. • CRM Connections drop-down list is now sorted alphabetically. • Improved Browser integration (now uses SERVER_URL to determine which browsers to use).
1.0.0.8	<p>Release Date: April 2011</p> <p>Features</p> <ul style="list-style-type: none"> • Support for CRM 2011 (Online/IFD/On-premise) • Outlook Add-in for CRM 2011, compatible with Outlook 2003/2007/2010(32-bit) • Sample intelli-CTi Dashboard for CRM 2011 now included • Qualification List (on Inbound Call recognition) is now grouped by Company Name <p>Fixes</p> <ul style="list-style-type: none"> • Issue when connecting to CRM 2011 via IFD (HTTPS/SSL)

Release Notes

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1.0	<p data-bbox="336 412 1007 443">Release Date: January 2011 – Initial Product Release</p> <p data-bbox="336 459 448 490">Features</p> <ul data-bbox="384 506 1374 875" style="list-style-type: none"><li data-bbox="384 506 1374 568">• Automatic identification of CRM Accounts, Contacts and Leads during incoming telephone calls.<li data-bbox="384 577 1126 609">• Automation of dialing CRM Accounts, Contacts and Leads.<li data-bbox="384 618 794 649">• In-call notepad capture facility.<li data-bbox="384 658 1337 721">• Automatic creation of Microsoft Dynamics CRM History record for completed telephone calls.<li data-bbox="384 730 1334 792">• Automatic logging of telephone call statistics in Microsoft Dynamics CRM for statistical reporting purposes.<li data-bbox="384 801 906 833">• Telephone number management (TNS).<li data-bbox="384 842 1259 873">• Integration with Dynamics CRM in both Internet Explorer and Outlook.