

intelli-CTi[™] for Microsoft Dynamics CRM

Microsoft Dynamics CRM Getting Started Guide

Document Version 1.1



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Overview

This document provides an outline to the basic steps required to implement intelli-CTi for Microsoft Dynamics CRM.

The purpose of this document is to assist getting started with intelli-CTi for Microsoft Dynamics CRM, however for more detailed information on installing, configuring and using intelli-CTi, please see the additional intelli-CTi reference information.

Who Should Read this Document

This document is intended for Microsoft Dynamics CRM administrators responsible for implementing intelli-CTi on a Microsoft Dynamics CRM system.

Additional intelli-CTi Reference Information

For information on installing and configuring intelli-CTi, see the intelli-CTi – Installation and Configuration Guide.

For information on using intelli-CTi, see the intelli-CTi – User Guide.

For information on using intelli-CTi for Microsoft Dynamics CRM, see the *intelli-CTi – Microsoft Dynamics CRM User Guide*.

For information on developing application integration with intelli-CTi, see the *intelli-CTi – Software* Developers Kit (SDK).

(contained within the SDK directory of your intelli-CTi for Microsoft Dynamics Installation Package).

For additional reference information on intelli-CTi, see the intelli-CTi Help Center at www.intellicti.com/help.

For up to date information on intelli-CTi, please visit the product website at www.intellicti.com.

About intelli-CTi for Microsoft Dynamics CRM

intelli-CTi for Microsoft Dynamics CRM provides seamless telephony integration into Microsoft Dynamics CRM Web client and Outlook client, providing many telephony features to enhance the usability of your Microsoft Dynamics CRM application.

Features include:

- Automatic identification and display of CRM Accounts, Contacts and Leads during incoming calls (screen-pop).
- Automate the dialing of CRM entities (e.g. CRM Accounts, Contacts and Leads)
- In-call notepad facility.
- Dynamics CRM Call Assistant providing ready access to caller-related information and common CRM operations.
- Call management and Call Wrap-up capability.
- Automatic tracking of the call-flow process.
- Automatic recording of CRM Phone Call activity and history.
- Automatic recording of call information within Microsoft Dynamics CRM for audit tracking; performance analysis.

Database Backup

Although every effort has been made to ensure the actions performed by this software product will not damage or corrupt your data, we strongly recommend you perform the following actions to safeguard against such eventualities.

In the unlikely event that data becomes lost or corrupted, QGate Software Limited cannot be held responsible.

Recommended Safeguards

Perform a complete backup of your database(s).

Prerequisites

This guide assumes a working knowledge of Microsoft Dynamics CRM administration skills.

In addition to the intelli-CTi Client Workstation requirements listed in the **intelli-CTi – Installation and Configuration Guide**, the following items are required:

System Requirements

For information regarding the minimum system requirements for installing and running intelli-CTi for Microsoft CRM, please visit the product system requirements page:

www.intellicti.com/help/sysreqs/

• Additional client specific settings are detailed on page 13.

Downloads

 The intelli-CTi product and integration with Microsoft Dynamics CRM is available for download from the QGate Software website, please contact QGate or your Microsoft Dynamics CRM Business Partner/Reseller for access.

Compatibility

For the latest information regarding the compatibility of intelli-CTi for Microsoft Dynamics CRM and other applications, please visit the compatibility matrix page:

www.intellicti.com/help/intelli-cti-ms-dynamics-crm-compatibility-matrix/

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Installing intelli-CTi for Microsoft Dynamics CRM

This section outlines the steps required to install and configure intelli-CTi for Microsoft Dynamics CRM into your system.

Installation Outline

The primary installation steps for installing and configuring your implementation of intelli-CTi for Microsoft Dynamics CRM are:

Step 1: I	nstall inte	elli-CTi cu	stomisation	IS
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Install supporting customisations.

Step 2: Migrate telephone numbers into intelli-TNS



Use the intelli-TNS Data Load utility to populate intelli-TNS with all you Page 11 telephone numbers.

Step 3: Install the intelli-CTi Client



Install the intelli-CTi client onto each computer that requires CTI Page 13 integration

Step 1: Install intelli-CTi customisations

To support intelli-CTi, there are some customisations that must be imported into CRM. These customisations consist of:

- A new entity called **intelliTNS** to store enhanced telephone number data. Required to enable call telephone recognition.
- A plug-in to process telephone number changes and store them in the intelliTNS entity.
- A new entity called **Call History** to store statistical call log information.
- A new security role called intelli-CTi User to allow users access to the items above.

The steps to install the intelli-CTi customisations are as follows:

Install Entity Customisations

- 1. Open the Microsoft Dynamics CRM web client.
- 2. Select Settings then Solutions from the navigation bar at the top of the screen.

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1-1 of1 (0 selected)							I4 4 Page 1 ▶
AN # A B C D E F G H I J K L M N O	P Q	R	S T	U	v v	N X	Y Z
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3. Click the Import button:

📑 Import

4. Click the Browse button and select the **intelli-CTi customizations.zip** file. This file is located in the following directory of your intelli-CTi for Microsoft Dynamics Installation Package: \Install\CRM Solution

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-	and the second descent and the second descent second second second second second second second second second se	
Select	t Solution Package	@ <u>H</u> el
	Select the compressed (.zip or .cab) file that contains the solution you want to import and click Next.	
	cation Support\Microsoft Dynamics CRM\CRM Server\CRM Customizations\intelli-CTi c Browse	
	Back Next	<u>C</u> ano

- 5. Click **Next**, then click **Import** on the Solution Information page.
- 6. On the Import Options page, tick the box to Activate any processes and enable any SDK message processing steps included in the solution.

Note: If you are performing an Update to existing intelli-CTi entity customisations, you must also choose to "Overwrite customizations".

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Import Options	<u> </u>
Inis solution package contains an update for a solution that is already installed.	
Upgrade Solution Action	
Stage for upgrade	
Previous customizations on components included in this solution	
Maintain customizations (recommended) Selecting this option will maintain any unmanaged customizations performed on components but also implies that some of the updates included in this solution will not take effect.	
Overwrite customizations Selecting this option will overwrite any unmanaged customizations previously performed on components included in this solution. All updates included in this solution will take effect.	
Back Import	<u>C</u> ancel
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Import Options page (updating an existing installation)

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Importing Solu	tion	🕜 <u>H</u> elp
	Import Customizations Webpage Dialog	
	Importing customizations. Please wait for the operation to complete	
htt	ps://qu 🕙 Internet Protected Mode: Off	

7. Click Next to start the customization import process

8. Once the import is complete, you will see a log of the new customizations. You can now click Close.

🥖 Impo	rt Solution - Intern	et Explorer			Ŀ	
Im	porting Solutio	n				elp
	1 The import of :	solution: intelli-CTi for	Microsoft Dynamics 3	865 / CRM completed	d successfully.	
	Date Time \downarrow	Туре	Display Name	Name	Status	
	10:23:51.56	Dependencies C			.	~
	10:23:43.76	Security Role	intelli-CTi User	intelli-CTi User	🛃 Se	
	10:23:42.48	Dashboard	intelli-CTi - Oper			
	10:23:42.26	Plugin Assembly	QGate.intelliTNS	QGate.intelliTNS		
	10:23:25.46	Chart		qgcti_intellitns	En En	
	10:23:25.46	Chart	Call History	qgcti_callhistory	En En	
	10:23:24.98	Entity Ribbon	intelliTNS	qgcti_intellitns	🗟 XN	
	10:23:24.86	Form	intelliTNS	qgcti_intellitns	Sy.	
	10:23:24.86	Entity Messanes		aacti intellitas	П. т.	•
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					Download Log File	Close
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Security Role: intelli-CTi User

In addition to new entities, the customisations also included a new Security Role called "intelli-CTi User". You will need to add this Security Role to all Microsoft Dynamics CRM users who intend to use intelli-CTi.

The customisation process is now complete and you can exit Microsoft Dynamics CRM.

Step 2: Migrate telephone numbers into intelli-TNS

Although the new **intelliTNS** entity for processing telephone numbers has been installed, it doesn't yet contain any data. To create intelliTNS entities for all of your existing Accounts, Contacts and Leads, you should run the **intelli-TNS Data Load Utility**.

The intelli-TNS Data Load Utility allows batch population of intelli-TNS entities from existing Account, Contact and Lead records. This typically only needs to be run once, when you install intelli-CTi for the first time. However, you may need to re-run the utility after doing a data import.

Prerequisites

The intelli-TNS Data Load Utility requires Microsoft .NET 4.6.2 to be installed.

Instructions

 Run the QGate.TNSDataLoader.Application.exe from the following directory on your intelli-CTi for Microsoft Dynamics Installation Package: \Install\intelli-TNS_Data_Loader

	(install (intelli ins bata boadel						
inte	elli-TNS Data	Load Utility - Logi	n				
N	Microsoft Dynamics CRM						
	- 0	Microsoft CRM S Specify your Micros Microsoft Dynamic	Service (CRM Online) Soft Dynamics CRM connection details CS CRM Service Connection				
		qgate demo	×				
		Web Site:	disco.cm4.dynamics.com				
		Organization:	QGate				
		- Login Credentials					
		Authenticatio	n				
		User Name:	admin@qgsl02.onmicrosoft.com				
		Password					
		Tasawora.					
			Remember Me				
Ver	sion: 4.0.1.0		Connect Cancel				

- 2. Select you CRM Service Connection from the drop down box, or create a new connection by clicking on the [...] button.
- 3. Specify your authentication details and click the **Connect** button.
- 4. Once you have connected successfully, there will be a short pause while the application retrieves data from Dynamics CRM.



intelli-TNS - Data Load Utililty			X
intelli-TNS	- Data Load Ut	ility	
urrent TNS Configuration			
INS Enabled			
TNS can be enabled/disabled using	the button below. This will not affe	t your current TNS configuration settin	igs or data.
tNS is En	abled	Disable TNS	
Enabled TNS Entities			
Field (Display Name)	Field Name	Call Recognition Enabled	Dialling Enabled
Account (account) - [Last Sync Date: Ne	ver]		
🗐 Main Phone	telephone1	×	\checkmark
🗐 Other Phone	telephone2	\checkmark	\checkmark
🗐 Telephone 3	telephone3	✓	\checkmark
Contact (contact) - [Last Sync Date: Nev	er]		
Business Phone	telephone1	✓	V
🗐 Home Phone	telephone2	×	×
🗐 Mobile Phone	mobilephone	V	V
Lead (lead) - [Last Sync Date: Never] —			
Business Phone	telephone1	✓	V
🗐 Home Phone	telephone2	×	×
Mobile Phone	mobilephone	×	×
			Configure
A TNS sync is required for one or more	entities.		Sync
			Close

 By default, the main telephone fields for Account, Contact and Lead will used for both Call Recognition and for Dialing support. If you wish to change this, click **Configure...** to change fields and settings accordingly.

6.	Now click	Sync	to move to	o the	next stage.

TNS Data Loader					
Sync Settin	gs Advanced Settings				
	Account (account)	Last Sync Date: Never			
13	✓ Include in Sync				
	Progress:	Ready to Sync	✓		
	Contact (contact)	Last Sync Date: Never			
13	Include in Sync				
	Progress:	Ready to Sync	~		
	Lead (lead)	Last Sync Date: Never			
13	✓ Include in Sync				
	Progress:	Ready to Sync	~		
			Start		
Process 0	utput				
Action	Result				
			Close		

7. Select which entity types you wish to capture into intelli-TNS.

Inbound caller recognition will only function for entities that you have loaded into intelli-TNS.

- 8. Click the Start button and wait for the data load to complete.
- 9. Once the data migration process is complete, you can close the intelli-TNS Data Load Utility.

Step 3: Install the intelli-CTi Client Application

The intelli-CTi client application provides the communication between your telephone system and Microsoft Dynamics CRM. It also provides the interface for the user to view and control inbound and outbound telephone calls.

This step will install the intelli-CTi client application and the intelli-CTi for Microsoft Dynamics CRM integration component.

Performing the client installation

Located in the **Setup** directory of your intelli-CTi for Microsoft Dynamics Installation Package you will find an installation setup program called **intelli-CTi for Dynamics CRM - Client Setup.exe**. Run this program and follow the on screen prompts.

Important Note: In this version of intelli-CTi there are different product installer packages depending on which application you are integrating with. Please ensure that the product installation package you have is for intelli-CTi for Microsoft Dynamics CRM.

For more detailed information on installing the intelli-CTi application, see the *intelli-CTi Installation and Configuration Guide*.

Client Integration Prerequisites (Internet Explorer)

In order for the product to function correctly, you need to ensure that the following settings are correct:

Add CRM Server URL to Trusted Sites

If you intend to use intelli-CTi with Internet Explorer, please make sure that the MS Dynamics CRM site you are connecting to has been added to the Trusted Sites. This can be done by adding the URL to the list of "Trusted Sites" on the "Security" tab of the "Internet Options" settings screen.



Client Integration Prerequisites (Chrome)

In order for the product to function correctly, you need to ensure that the following settings are correct:

Enable QGate Integration Chrome Extension

If you intend to use intelli-CTi with Chrome, please make sure that the QGate Integration Extension has been enabled in Chrome. This can be done from the Chrome settings screen.

Disable Chrome running in the Background

By default, Chrome has the ability to remain running in the background when you close the browser (via an icon in the tray/notification area). However, this feature conflicts with our Integration Extension and must be disabled.

This can be done by right-clicking the Chrome tray icon and ensuring the "Allow Google Chrome to run in the background" is unchecked.



Configuring the intelli-CTi for Microsoft Dynamics CRM Client

For the intelli-CTi integration with Microsoft Dynamics CRM to work, you have to configure the intelli-CTi client so that it can find your Microsoft Dynamics CRM data service. To do this, proceed as follows:

- Run the QGate Breeze Configuration from the Windows Start Menu ("All Programs > QGate Breeze > QGate Breeze Settings"). This will open the QGate Breeze Service Management screen.
- 2. Select the **QGate Integration Service for Microsoft Dynamics CRM** from the list and click the **Configure...** button.

B ₂ Q	Gate Breeze Configuration		- = x				
QGa	ate Breeze Configuration						
Ser	Service Management General Settings						
Ena	ble/disable Services and configure how they	operate.					
R	egistered Services		Service Details				
Na	ame	Startup Type	QGate Integration Service for				
Q	Gate Integration Service for Dynamics CRM	Auto	Publisher:				
Q	Gate intelli-CTi Application	Auto	OGate Software Limited				
Q	Gate intelli-CTi for Microsoft Dynamics CRM	Auto	Version:				
Q	Gate intelli-CTi Service	Auto					
			Description:				
			QGate Breeze AppService for				
			CRM				
			Configure				
			Service Control				
			Startup type: Auto				
Re	Register New Service Unregister Service						
			OK Cancel				

- 3. Choose the CRM Client application you wish intelli-CTi to integrate with.
- 4. Select the target Microsoft Dynamics CRM Service connection from the list. If your Service is not in the list, click the [...] button and add a new connection.
- 5. Click the **Test Connection** button to make sure that your connection is working.
- 6. Click the **Save** button to save your configuration settings.
- 7. Click the **OK** button.

P	QGate Integration for Dynamics CRM Configuration Options							
nfigu	ration for the QGate Microsoft Dynamics CRM Integration service							
	Client Integration Options These options will affect the integration with client applications							
	Chosen CRM Client Integration Select the Microsoft Dynamics CRM client integration to be used. Internet Explorer							
Spe	Connection Details The details of the Microsoft Dynamics CRM connection to be used ofly the Microsoft Dynamics CRM connection you wish to use.							
	Microsoft Dynamics CRM Server Connection							
	CRM Server CRM Server CRM Server: cm2013.qgate.co.uk Organization: QGate Adventure							
	CRM Server CRM Server CRM Server: cm2013.qgate.co.uk Organization: QGate Adventure Login Credentials Authentication User name: Password: Test Connection							

You can also manage the functionality of intelli-CTi for Microsoft Dynamics CRM (Call Wrap-up, Call History/Logging, etc). To do this, proceed as follows:

- Run the QGate Breeze Configuration from the Windows Start Menu ("All Programs > QGate Breeze > QGate Breeze Settings"). This will open the QGate Breeze Service Management screen.
- 2. Select **QGate intelli-CTi for Microsoft Dynamics CRM** from the list and click the **Configure...** button.

B	QGate Breeze Configuration		- = x								
QGate Breeze Configuration											
	Service Management General Settings										
1	Enable/disable Services and configure how they operate.										
	Registered Services	Service Details									
	Name	Startup Type	QGate intelli-CTi for Microsoft								
	QGate Integration Service for Dynamics CRM	Auto	Publisher:								
	QGate intelli-CTi Application	Auto	QGate Software Limited								
	QGate intelli-CTi for Microsoft Dynamics CRM	Auto	Version:								
	QGate intelli-CTi Service	Auto									
			Description:								
			QGate Breeze AppService for intelli-CTi for integration with								
			Configure								
			Service Control								
			Startup type: Auto								
	Register New Service Unregister Service										
OK Cancel											

3. Here you can manage how you would like intelli-CTi for Microsoft Dynamics CRM to function.



Your client application is now ready to use. See the *intelli-CTi for Microsoft Dynamics User Guide* for more information about how to use intelli-CTi.

Uninstalling intelli-CTi for Microsoft Dynamics CRM

This section outlines the steps required to uninstall intelli-CTi for Microsoft Dynamics CRM, for both the Service and Client components.

Uninstalling Client Installation

For each client, please follow the steps below to uninstall:

- 1. Please close any open applications
- 2. Open up the Windows Control Panel
- Open "Programs and Features" (or "Add/Remove Programs" depending on your version of Windows)
- 4. Uninstall the following programs:
 - QGate intelli-CTi for Microsoft Dynamics CRM
 - QGate intelli-CTi
 - QGate Breeze
- 5. Done

Uninstalling the intelli-CTi Service

- 1. Please close any open applications
- 2. Open up the Windows Control Panel
- Open "Programs and Features" (or "Add/Remove Programs" depending on your version of Windows)
- 4. Uninstall the following programs:
 - QGate intelli-CTi Service
 - QGate intelli-CTi Device Service
- 5. Done

Uninstalling CRM Customisations

Uninstall the CRM Solution

- 1. Open the Microsoft Dynamics CRM web client.
- 2. Select **Settings** then **Solutions** from the navigation bar on the left-hand side of the screen.

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8	X 🖻 🖏	6 6 5	🔉 🕒 🖟	More Actions	-							
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			. v t	, <u> </u>	• •	n L	- IN		5 3 1	- V		

- 3. Select the "intelli-CTi for Microsoft Dynamics CRM" Solution from the list.
- 4. Click on the Delete button.
- 5. Confirm that you want to remove the Solution.
- 6. Done

intelli-CTi – Technical Support and Troubleshooting

In the interest of providing customers with the latest product support information, QGate provides the following online resources within our intell-CTi Help Center website:

General Support

For general technical support information, please visit the main product support page: www.intellicti.com/help/

Troubleshooting

For troubleshooting common problems and scenarios relating to intelli-CTi for Microsoft Dynamics CRM, please visit the troubleshooting page:

www.intellicti.com/help/troubleshooting/for-dynamics-365/

System Requirements

For information regarding the minimum system requirements for installing and running intelli-CTi for Microsoft Dynamics

CRM, please visit the product system requirements page:

www.intellicti.com/help/sysreqs/

Product Information

For more information about intelli-CTi for Microsoft Dynamics CRM, please visit the intelli-CTi product website:

www.intellicti.com/

Fault Reporting

If you wish to report a fault or an issue with intelli-CTi, please contact your intelli-CTi software supplier.

Upgrades and Service Releases

Revision upgrades and service releases of intelli-CTi are available from your intelli-CTi software supplier or Microsoft Dynamics CRM Business Partner.

Warning: We strongly recommend you review the release information provided with each release, to ensure each upgrade is suitable to apply. If you are in any doubt, we recommend you contact your intelli-CTi software supplier.

All major version release upgrades will require the purchase of a new licence.

Systems Integration

For advice on integrating intelli-CTi into Microsoft Dynamics CRM products and other applications, please contact your intelli-CTi software supplier.