



*intelli-CTi*<sup>TM</sup>  
for Microsoft Dynamics CRM  
Version 4.1

**Microsoft Dynamics CRM  
Getting Started Guide**

Document Version 1.1



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

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

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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](http://www.intellicti.com/help).

For up to date information on intelli-CTi, please visit the product website at [www.intellicti.com](http://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/](http://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/](http://www.intellicti.com/help/intelli-cti-ms-dynamics-crm-compatibility-matrix/)

## 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: Install intelli-CTi customisations



Install supporting customisations.

Page 8

#### Step 2: Migrate telephone numbers into intelli-TNS



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

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#### Step 3: Install the intelli-CTi Client



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

Page 13

## Step 1: Install intelli-CTi customisations

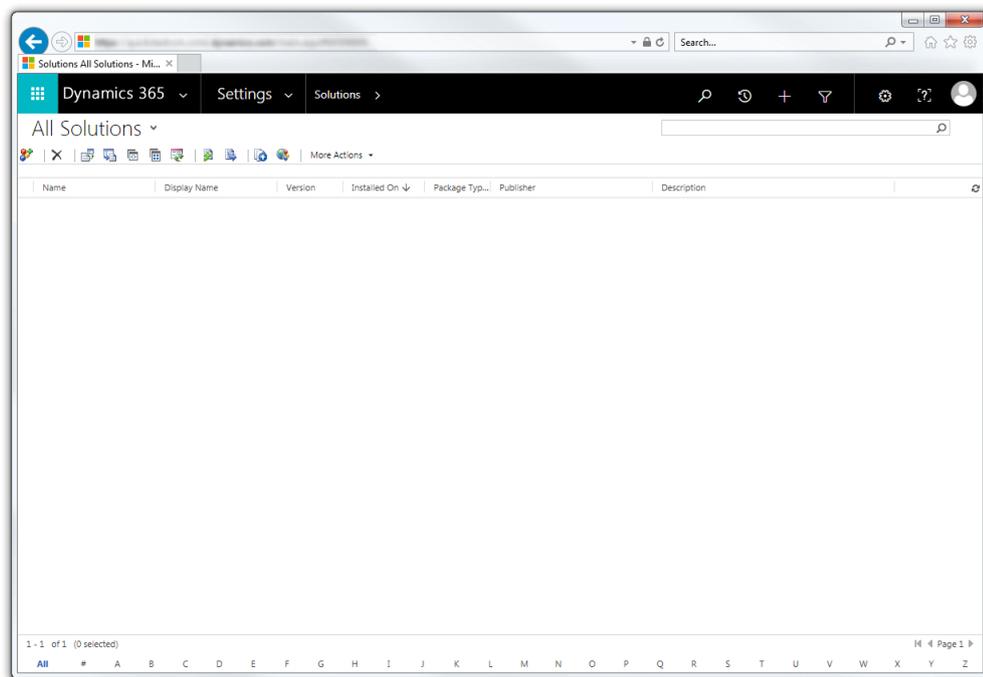
To support intelli-CTi, there are some customisations that must be imported into CRM. These customisations consist of:

- 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.

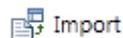
The steps to install the intelli-CTi customisations are as follows:

### Install Entity Customisations

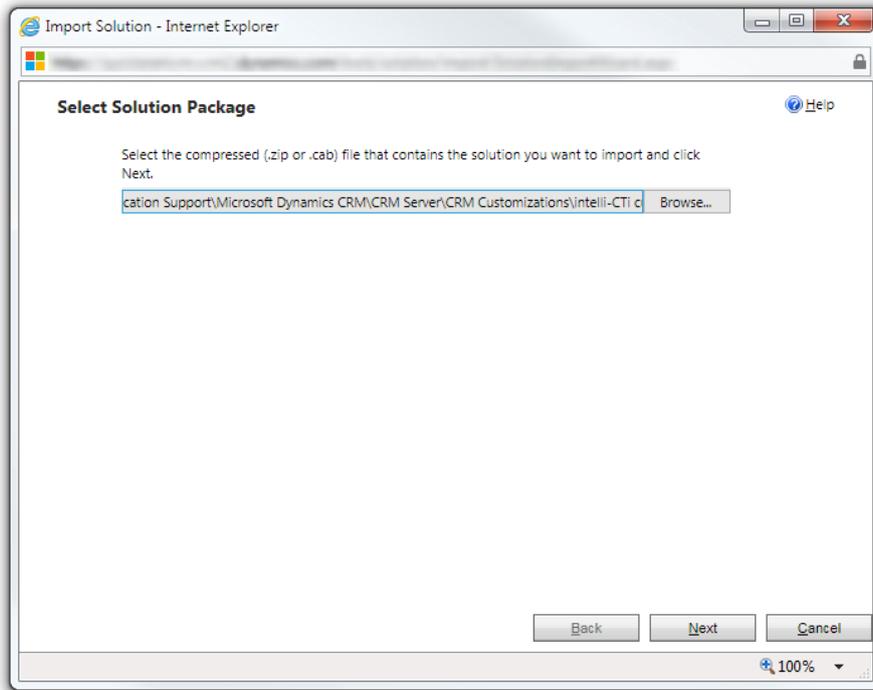
1. Open the Microsoft Dynamics CRM web client.
2. Select **Settings** then **Solutions** from the navigation bar at the top of the screen.



3. Click the **Import** button:

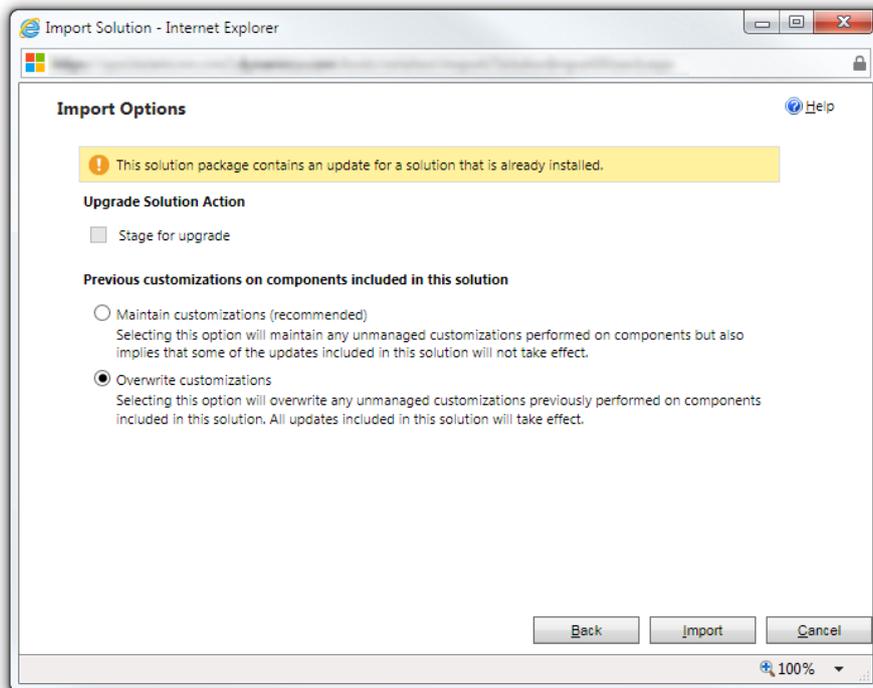


4. Click the **Browse** button and select the **intelli-CTi customizations.zip** file. This file is located in the following directory of your intelli-CTi for Microsoft Dynamics Installation Package:  
`\Install\CRM Solution`



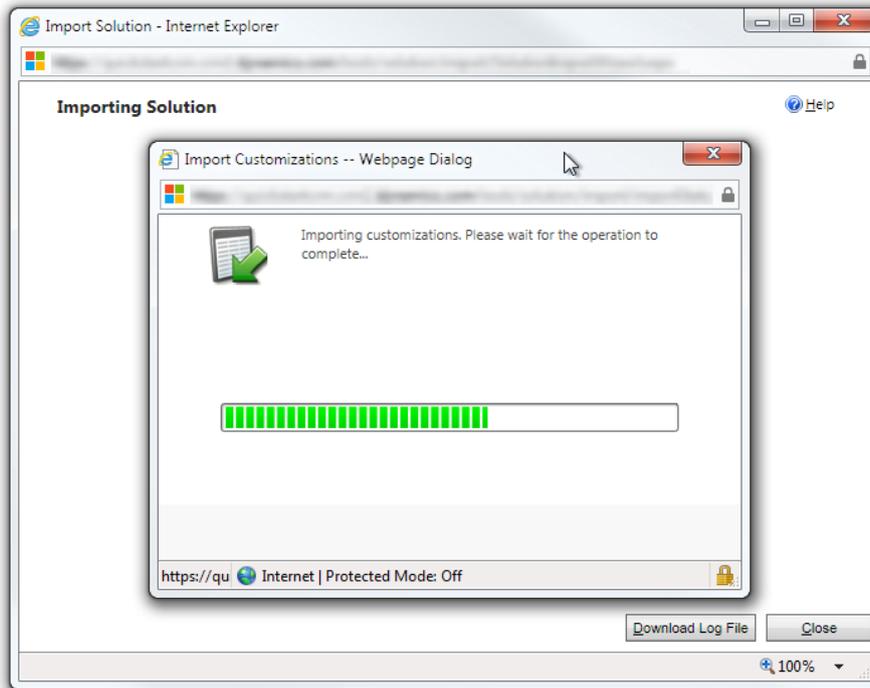
5. Click **Next**, then click **Import** on the Solution Information page.
6. On the Import Options page, tick the box to Activate any processes and enable any SDK message processing steps included in the solution.

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

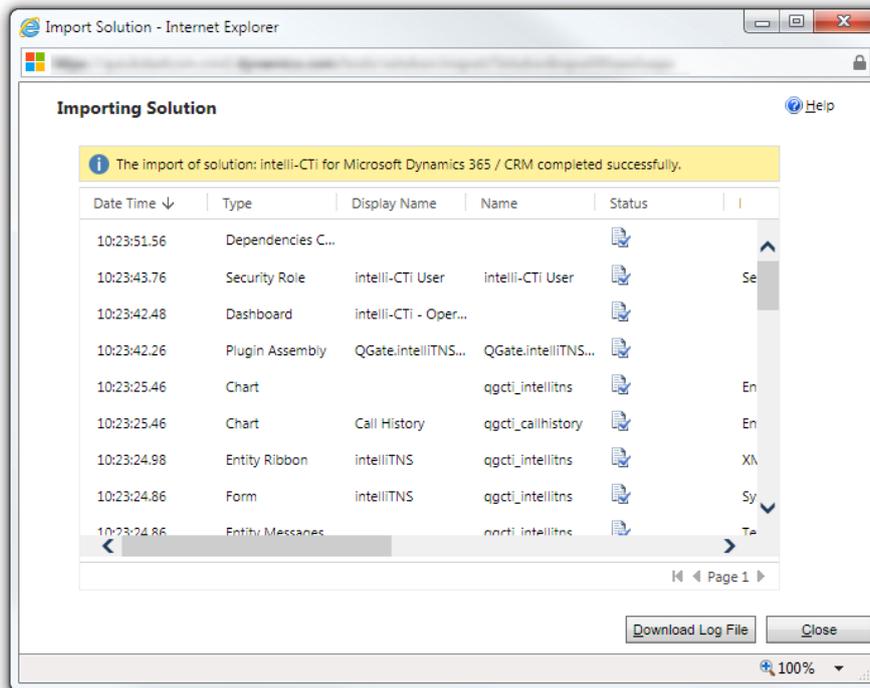


*Import Options page (updating an existing installation)*

## 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.

**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

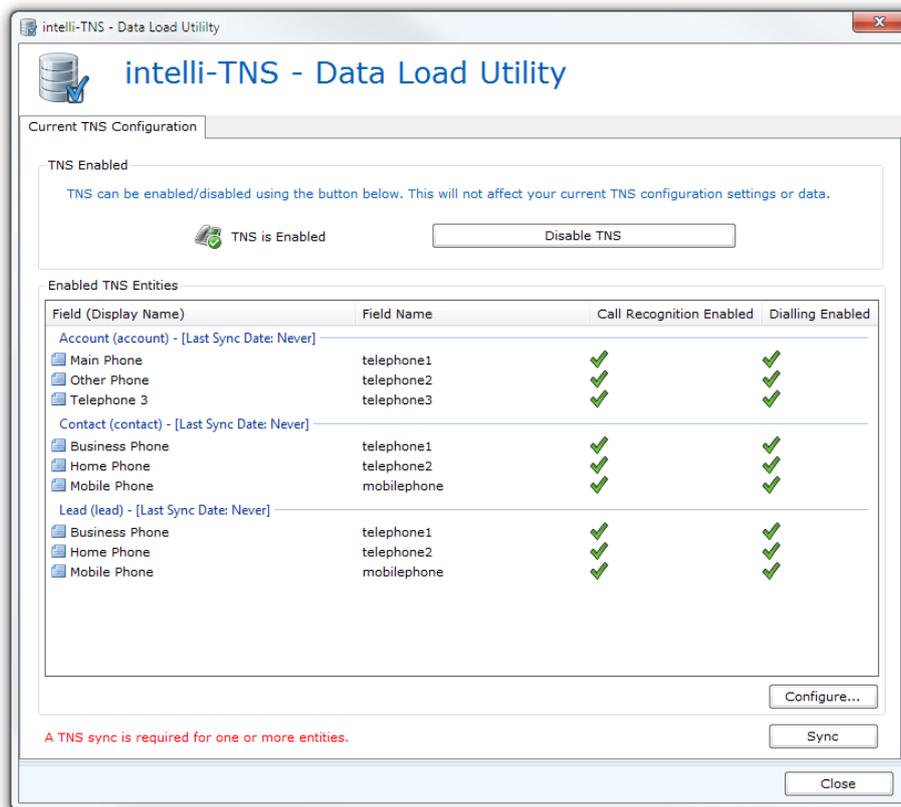
The intelli-TNS Data Load Utility requires Microsoft .NET 4.6.2 to be installed.

### Instructions

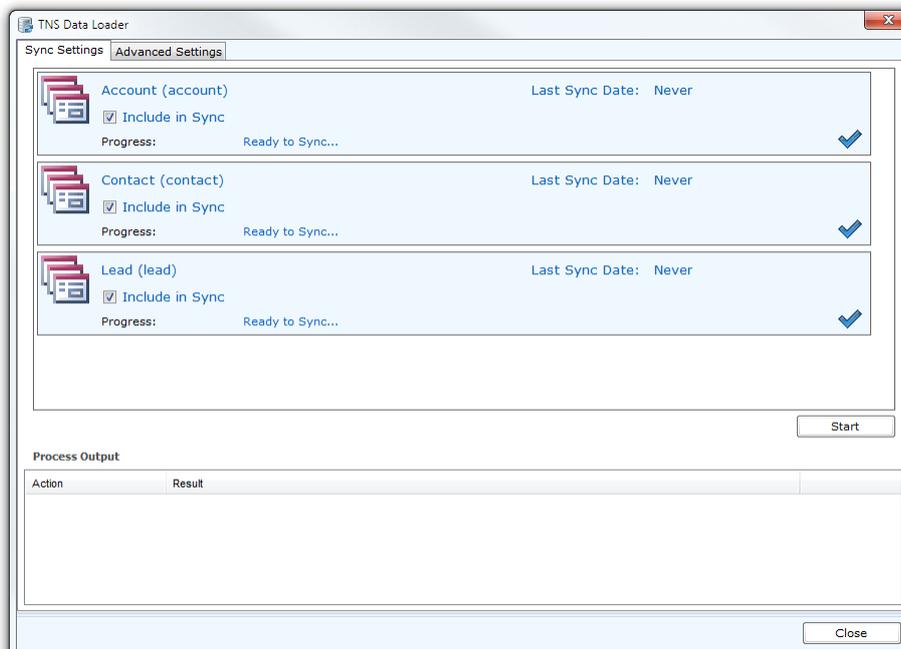
1. Run the **QGate.TNSDataLoader.Application.exe** from the following directory on your intelli-CTi for Microsoft Dynamics Installation Package:  
`\Install\intelli-TNS Data Loader`

2. Select your 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.





- By default, the main telephone fields for Account, Contact and Lead will be used for both Call Recognition and for Dialling support. If you wish to change this, click **Configure...** to change fields and settings accordingly.
- Now click **Sync** to move to the next stage.



- 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.**
- Click the Start button and wait for the data load to complete.
- 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.**

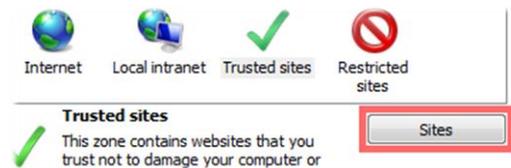
For more detailed information on installing the intelli-CTi application, see the *intelli-CTi Installation and Configuration Guide*.

#### **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:

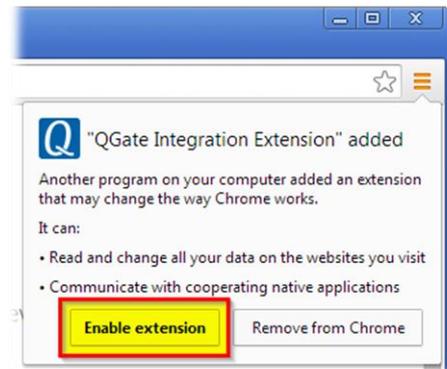
##### **Enable QGate Integration Chrome Extension**

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.

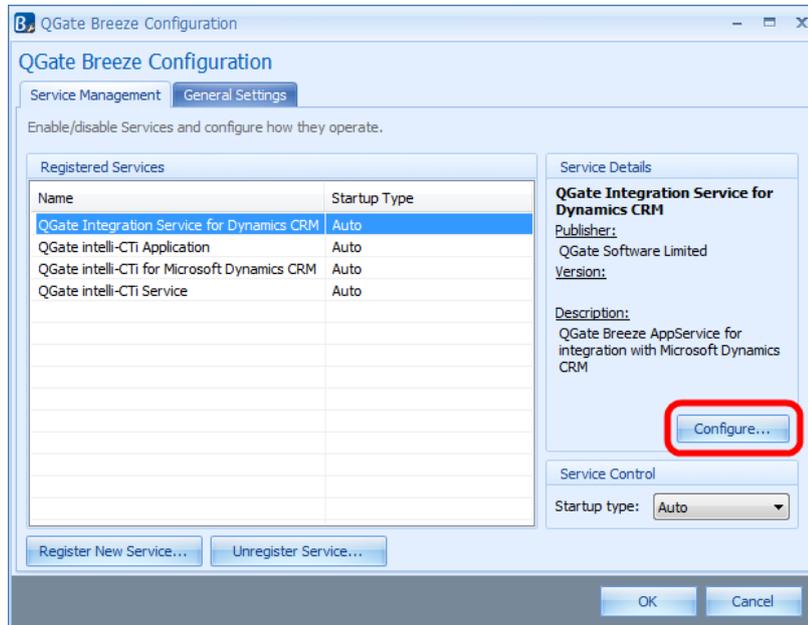
This can be done by right-clicking the Chrome tray icon and ensuring that the "Allow Google Chrome to run in the background" is unchecked.



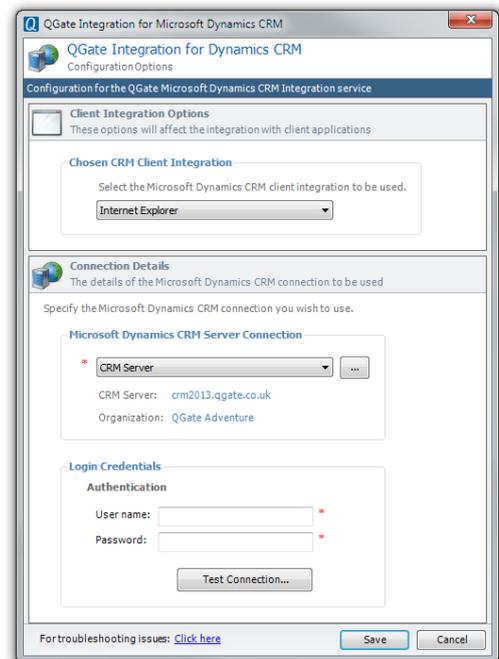
### Configuring the intelli-CTi for Microsoft Dynamics CRM Client

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:

1. 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.

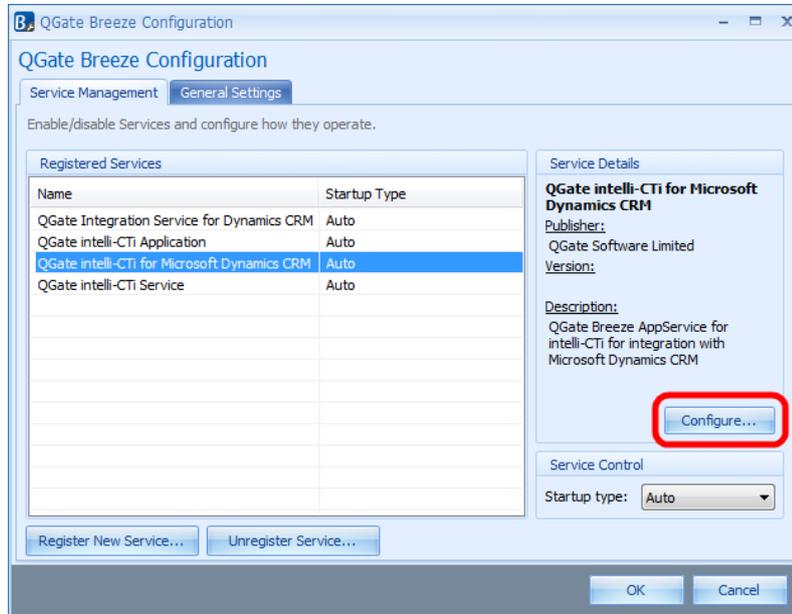


3. Choose the CRM Client application you wish intelli-CTi to integrate with.
4. Select the target Microsoft Dynamics CRM Service connection from the list. If your Service is not in the list, click the [...] button and add a new connection.
5. Click the **Test Connection** button to make sure that your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

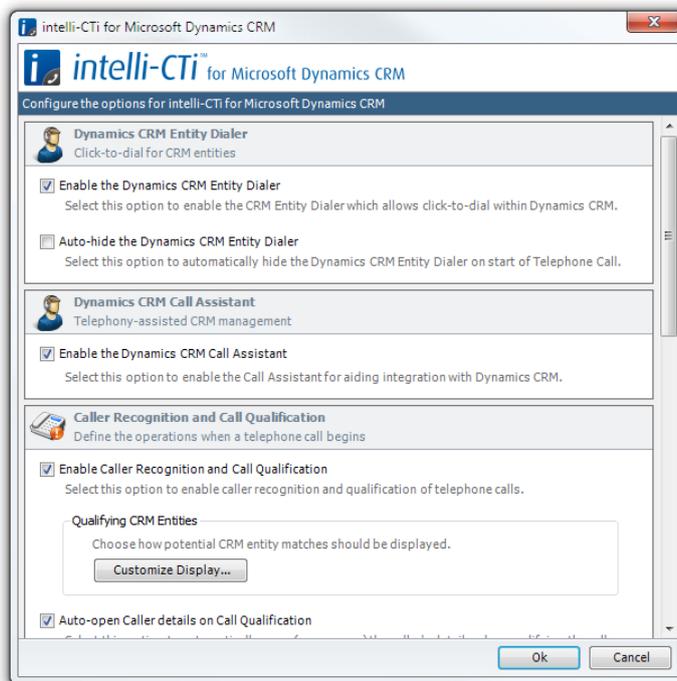


You can also manage the functionality of intelli-CTi for Microsoft Dynamics CRM (Call Wrap-up, Call History/Logging, etc). To do this, proceed as follows:

1. 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.



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
3. 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

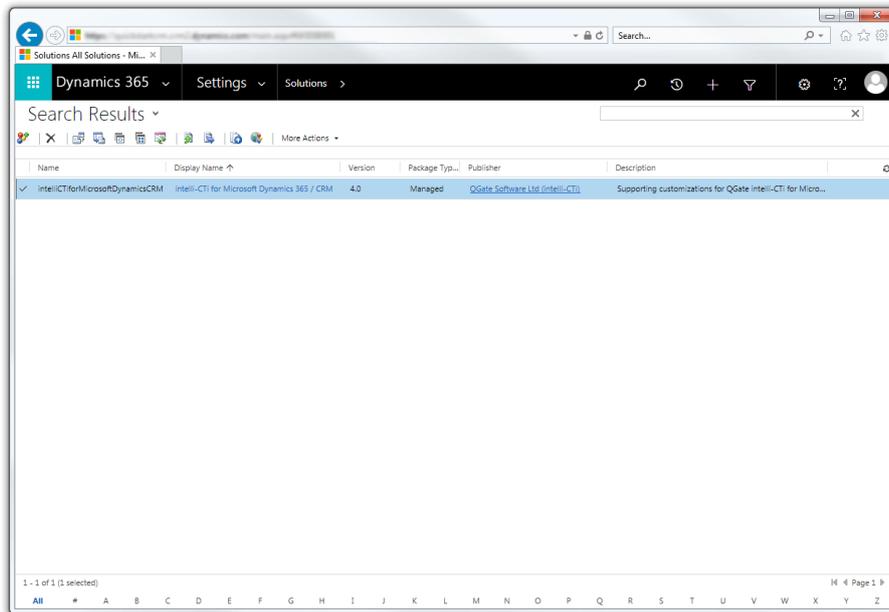
### Uninstalling the intelli-CTi Service

1. Please close any open applications
2. Open up the Windows Control Panel
3. 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.



3. Select the “intelli-CTi for Microsoft Dynamics CRM” Solution from the list.
4. Click on the Delete button.  
 **Delete**
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 intelli-CTi Help Center website:

### **General Support**

For general technical support information, please visit the main product support page:

[www.intellicti.com/help/](http://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/](http://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/](http://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/](http://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.