intelli-CTi™
for Microsoft Dynamics 365

Version 4.2

intelli-CTi for Microsoft Dynamics 365 - Installation and Configuration Guide

Document Version 1.0

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Overview

This document is a guide to the installation and configuration process for intelli-CTi™.
This guide outlines the following:

- intelli-CTi™ system requirements
- Installation planning
- Installing the intelli-CTi™ client software
- Installing and configuring the network support
- Configuring intelli-CTi™ application notifications
- Testing your installation

System Requirements

In the interest of providing customers with the latest product support information, we provide the following online resources within our intelli-CTi™ website:
S

System Requirements

For information regarding the minimum system requirements for installing and running intelli-CTi™, please visit the product system requirements page:
www.intellicti.com/help/sysreqs/

Telephony System Support

To enable intelli-CTi™ to integrate with your telephone system, the necessary system interfaces within your telephone system must be enabled.

As part of the installation process, you will need to know the IP address of your telephone system. There may be other requirements for your telephone system.

For a detailed list of the telephone systems that we support and the necessary system requirements for each system, see our intelli-CTi™ Compatibility List.

Installation Outline

This section outlines the steps required to install and configure intelli-CTi™.

intelli-CTi Core Installation

Install the intelli-CTi™ Service Software (On-Premises Only)

The intelli-CTi™ Service communicates with your on-premises telephone system. This installation will also include the intelli-CTi™ Management Console, used to administer the integration to your telephone system, users and licensing.

Note: *If you are installing intelli-CTi™ for demonstration purposes, i.e. you are not intending to connect it to a real-life telephone system, then you can skip this step and use the QGate Virtual Telephony Server (VTS).*

Install the intelli-CTi™ Management Console Software (Cloud-Hosted Only)

The intelli-CTi™ Management Console provides the means to manage your intelli-CTi™ users.

Install the intelli-CTi™ Client Software

The intelli-CTi™ client software allows users to view their telephone activity and provides telephony integration with applications on the users desktop.

intelli-CTi for Microsoft Dynamics 365 Installation

Install customizations

Install supporting customizations.

Migrate telephone numbers into intelli-TNS

Use the intelli-TNS Data Load utility to populate intelli-CTi™ with all your telephone numbers.

Install the Client

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

Installing intelli-CTi

intelli-CTi – Installation Planning

This section will assist you in the considerations you should make when planning your intelli-CTi™ installation.

It also outlines certain questions that should be asked and the appropriate support you should consider.

Telephone Switch Vendor

It is highly likely that you will require the support of your telephone switch vendor or telecommunications provider at some stage during the installation. This may simply be to ask certain questions and to establish what steps are required to CTI-enable your telephone system.

It may also be required for the switch vendor to make technical changes to the telephone system to enable CTI within the system.

The switch vendor may also be required to provide the necessary software support to connect your telephone system to your computer network and the Telephony Client Software support for the intelli-CTi™ Device Service.

Questions and Answers

When planning an intelli-CTi™ installation, it is recommended that the following questions are asked. Whether it be a proof of concept study or a full implementation, this information is very important during the planning stages of an installation.

Q   **What is the make and model of your telephone system?**

- This may be something the internal systems support groups are able to answer, or something the telephone switch vendor or supplier should be able to.

Q   **Is the telephone system on the list of telephone systems supported by intelli-CTi?**

- For a detailed list of the telephone systems that we support and the necessary system requirements for each system, see our intelli-CTi™ Compatibility List.
- You will also find more information about what software and licensing will be required from your telephone system supplier.
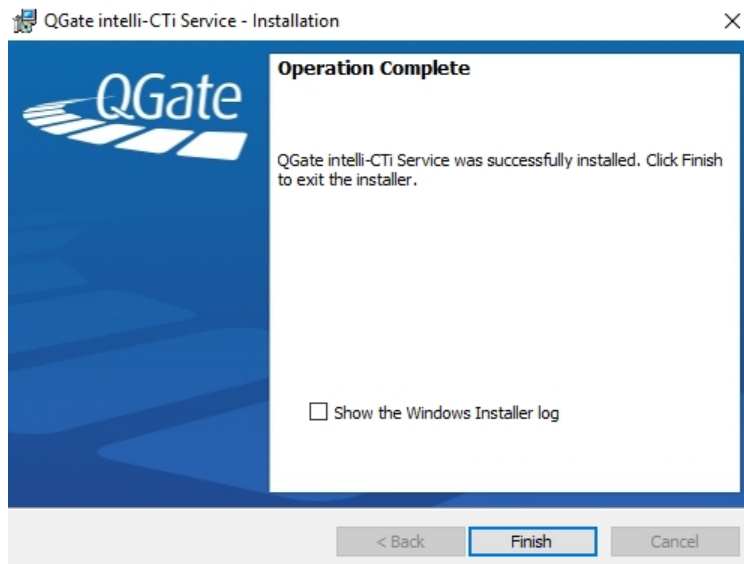
intelli-CTi Installation

Installing the intelli-CTi Service Software

Installation of the intelli-CTi™ Service is completed by use of an install wizard. If you are using a **Cloud** hosted platform you can skip this part.

Installation Procedure

1. Run the **intelli-CTi** - **Service Setup.exe** file from within the **Install** directory of your intelli-CTi™ Installation Package. The installer will start.
2. Click on the **Install** button to start the installation process.
3. The installation will start. This might take a while, depending on whether any of the required software needs to be installed (see above).
4. When the installation is complete, the following dialog will be displayed:

5. Click the **Finish** button.

Installing the intelli-CTi Management Console (Cloud-Hosted Only)

Installation of the intelli-CTi™ Management Console is completed by use of an install wizard. If you are using a **Cloud** hosted platform you can continue with this part otherwise you should complete the service installation if you host your telephone system on-site.

Installation Procedure

1. Run the **intelli-CTi™ Service - Management Console Setup.exe** file from within the **Install** directory of your intelli-CTi Installation Package. The installer will start.
2. Click on the **Next** button to proceed through the installation setup process.
3. Click on the **Install** button to start the installation process.
4. The installation will start. This might take a while, depending on whether any of the required software needs to be installed (see above).
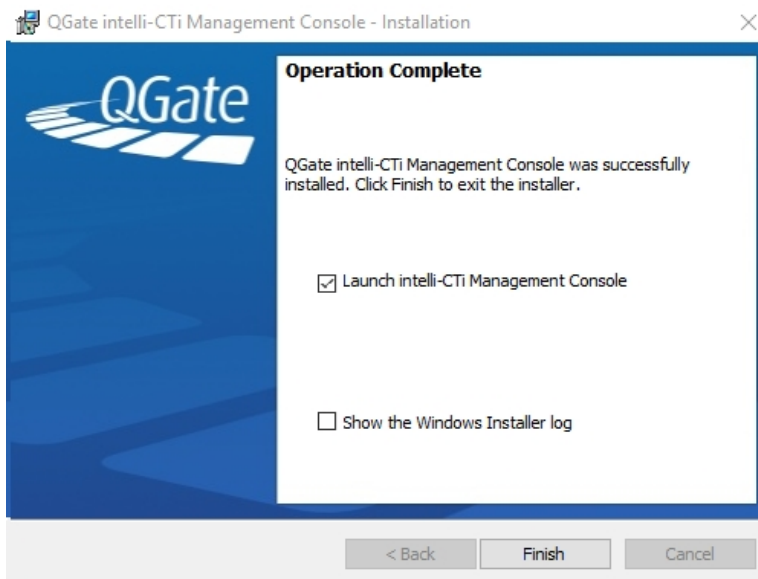5. When the installation is complete, the following dialog will be displayed:

6. Click the **Finish** button to complete the installation which will also launch the Management Console for Configuring the Service.

Configuring intelli-CTi Service

Configuration of the intelli-CTi™ Service is completed by using the intelli-CTi™ Management Console.

Note: If you do not already have the intelli-CTi™ Management Console installed, run the intelli-CTi™ Service - Management Console Setup.exe from within the Install directory of your intelli-CTi™ Installation Package, following the on-screen instructions.

Login Procedure

On loading the intelli-CTi™ Management Console, you will be prompted to log in to the Service.

From the intelli-CTi™ Management Console you can select one of the following intelli-CTi™ service type modes:
1. Network Service
2. Cloud Service

Network Service

QGate provides a networked intelli-CTi™ Service to integrate with on-premises telephone systems. This service should of been installed during the intelli-CTi™ Service Software Installation. To connect to a Networked intelli-CTi™ Service do the following:

1. Select Network Service from the intelli-CTi™ Service Type drop down menu.
2. Enter your intelli-CTi™ Service DNS name or IP Address for connecting to the Service.
    1. If you are on the same machine that the intelli-CTi™ was installed to, then use "localhost" as the Service name. Otherwise, enter the name/IP of the remote machine where intelli-CTi™ Service has been installed.
3. Specify the type of authentication you would like to use to connect to the intelli-CTi™ Service (Windows Authentication or Specific intelli-CTi™ User). If you specify to use a intelli-CTi™ User, you will be required to enter the user name and password for authentication.

    Note: The default administrator user name is "administrator" with an empty password. You are advised to change the default administrator password on first login (by setting a new password within the user management area).

4. When you're ready, clicking OK will attempt to make a connection to the service running the intelli-CTi™ Service. If a connection is successful, a message will be displayed. If for any reason the connection failed, it will also result in a message being displayed about the error.
5. Some additional settings related to connecting to your intelli-CTi™ Service can be found by clicking Show Additional Settings.
6. Proceed to Subscription Management.

Cloud Service

If you have a hosted telephone system, QGate will provide a Cloud Hosted intelli-CTi™ Service. To connect to a hosted intelli-CTi™ Service do the following:

1. Select **Cloud Service** from the **intelli-CTi™ Service Type** drop down menu.
2. Enter your **intelli-CTi™ Cloud Service** Subscription Key.
3. Specify the **username** and **password** to authenticate with the Cloud Service, username and password are the only authentication methods currently available for cloud authentication.

    Note: The default administrator user name is "administrator" with an assigned password given by your intelli-CTi™ software supplier. You are advised to change the default assigned administrator password on first login (by setting a new password within the user management area).


4. When you're ready, clicking **OK** will attempt to make a connection to the service running the intelli-CTi™ Service. If a connection is successful a message will be displayed, for any reason to why a connection would not connect would also be displayed on failure to connect.
5. Some additional settings related to connecting to your intelli-CTi™ Service can be found by clicking **Show Additional Settings**.

Subscription Management

The subscription management screen allows you to manage your intelli-CTi™ Service Registration, as well as seeing your intelli-CTi™ Subscription/License entitlement details.

Note: *This is only applicable to customers with an on-premises/Network intelli-CTi™ Service, if you are using QGate's Cloud service you can skip this step.*

1. The first time you load the intelli-CTi™ Management Console, you will be taken to the Manage Subscriptions page.
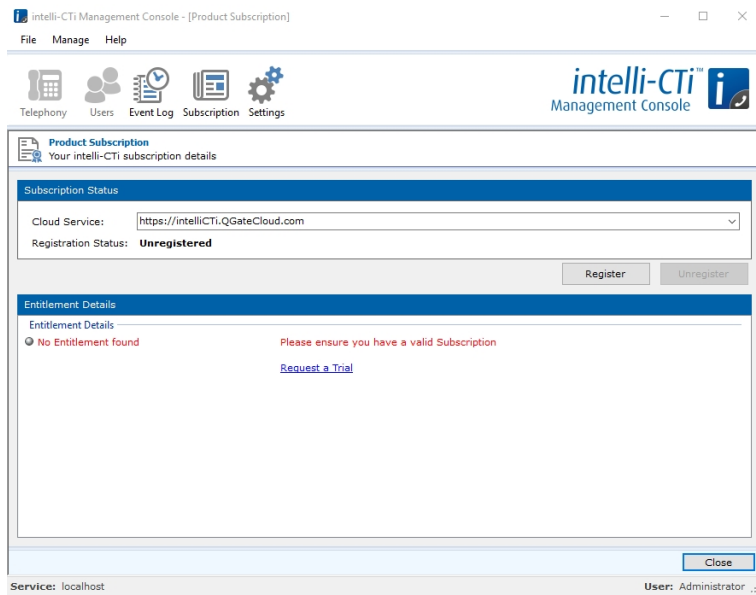
2. If you already have your intelli-CTi™ Subscription details, please skip to the next step.

   If you do not yet have a Subscription and would like to evaluate the product, you can request a free trial by simply clicking the link displayed and following the on-screen instructions.
3. Once you have your trial Subscription details, you can register your intelli-CTi Service by clicking the **Register** button, entering your Subscription details in the fields provided and submitting them.
4. If the Registration was successful, you should receive a confirmation and be presented with your intelli-CTi™ entitlement details.
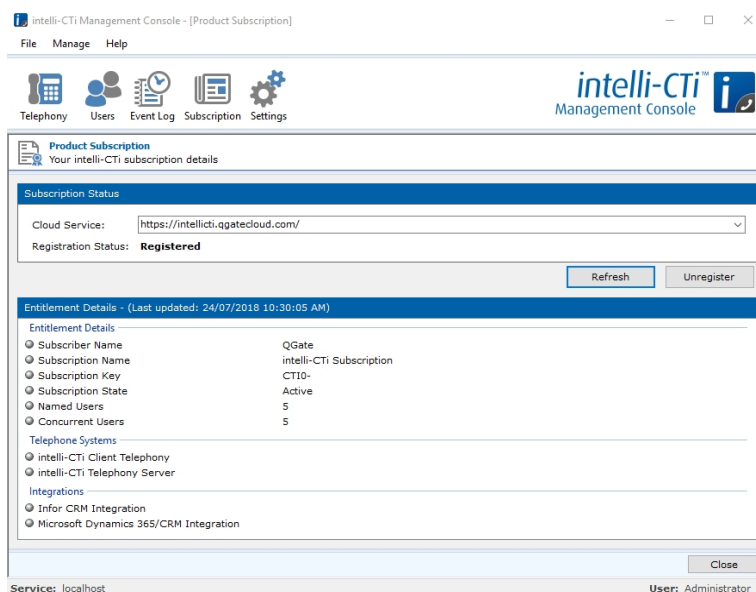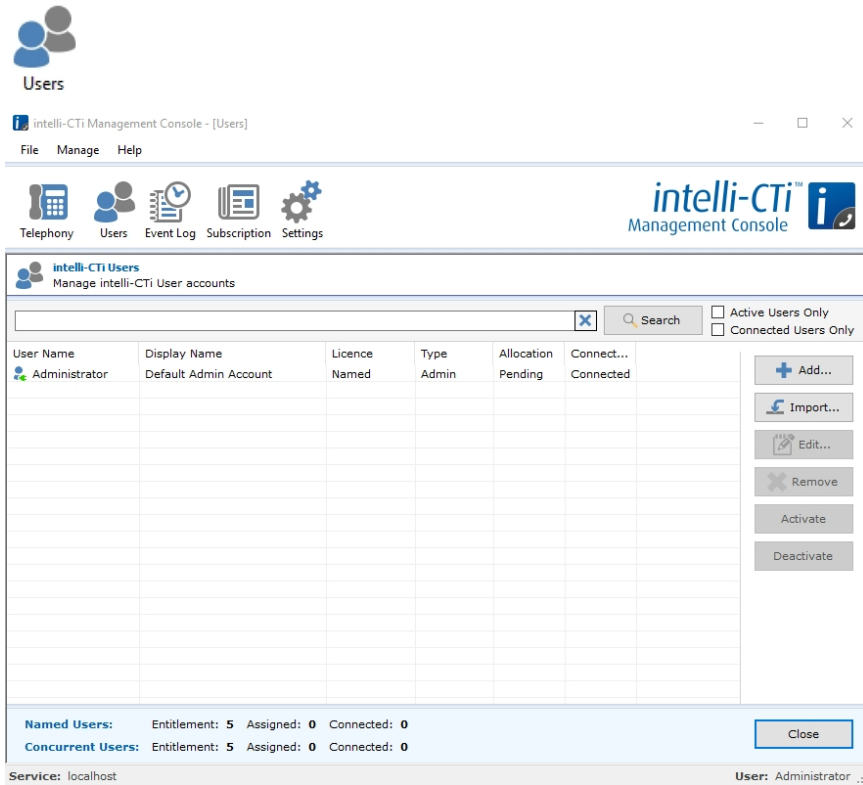
5. Once you have finished registering your intelli-CTi Service, and have an active Subscription, you can click **Close**.
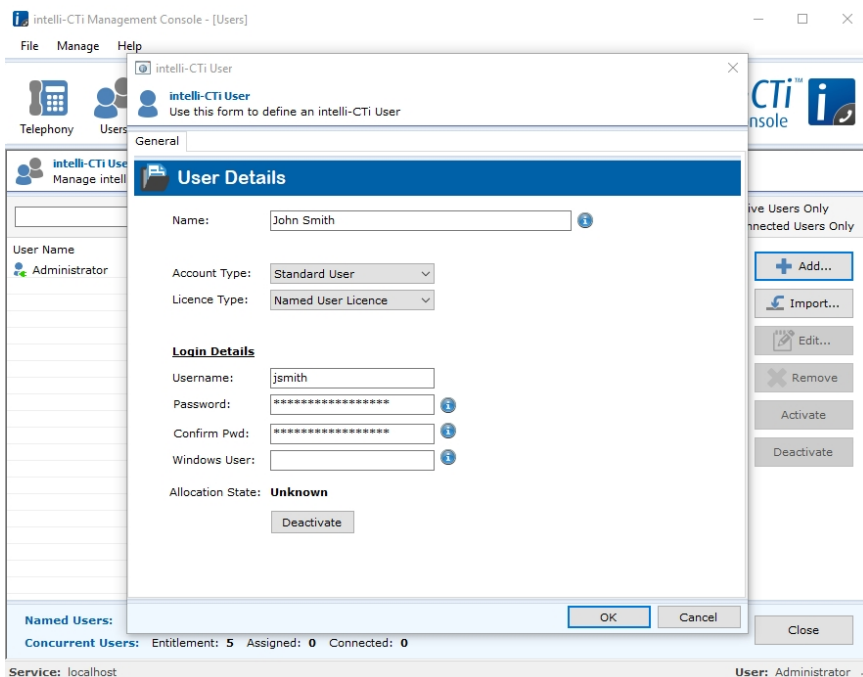
User Management

The user Management Screen allows you to manage the user accounts that will be using intelli-CTi™.

1. Click the **Users** tool-bar button to view the User management page.

2. You can add additional users either by importing them from Active Directory, or by creating them manually. Create a new User now, by using either of these methods.

3. Now fill in the Users relevant details. For "Account Type"; most users should be set to "Standard

User" (Only "Administrator Users can login to the intelli-CTi Service using the Management Console. If you choose to create another administrator, an email would be required for notification of changes and alerts on the intelli-CTi Service).

4. With regards to License Type; this setting will largely depend on your intelli-CTi Subscription.
    For either license type; users will be allowed to connect to the intelli-CTi Service as long as the current usage does not exceed the license count.
    1. **Named**: The license will be pending activation until the user first logs in to activate the license.
    2. **Concurrent**: Works on a *first come first served* basis, once the user is connected the license is assigned, but this does not affect named licenses.
5. Once you've completed the user details, click **OK** to create your new user for intelli-CTi.

Note*: You can edit a user by selecting the user and clicking edit. You can also edit a group of users licenses, account type and activation status by selecting more than one user and clicking edit (you cannot edit a non-active user).*

Telephony Management

The Telephony Management Screen will used to setup the integration with your on-premises telephone system. Telephony Management is only related to on-premises and not Cloud Hosted telephone systems or evaluation of the product.

Notes:

-   *This is only applicable to customers with an on-premises/Network intelli-CTi™ Service, if you are using QGate's Cloud service you can skip this step.*
-   *If you are evaluating the product without a telephone system, you can skip this section and go to the Virtual Telephony Service (Demo).*

1. Click the **Telephony** toolbar button to enter the telephony admin area. By default you will be taken to the Site page. Here you can enter information about your location.

Telephony

2. Please enter a name for your site, and then configure the Country and Area code. Once you are done, press the **Save** button.

3. Click the **System** button to view the Telephone system page.

Here you enter information about your telephone system environment

4. Select your telephone system from the list and enter the details required.
    Note: Trunk Access is the number that you dial for an outside line (Normally '9).
5. Click the **Save** button. The application will attempt to download a list of extension numbers from your telephone system. This might take a few seconds.
6. When it has finished downloading the list, click the **Extensions** button.

7. Review the list of extension numbers and press the **Close** button to finish the installation wizard.
8. To check that your intelli-CTi™ Service is now connected to your telephone system, follow the procedure in intelli-CTi Telephony Service test

Settings

1. Click the **Settings** toolbar button to view the System Configuration page.

2. This screen allows you to view the current port number being used for the Service.
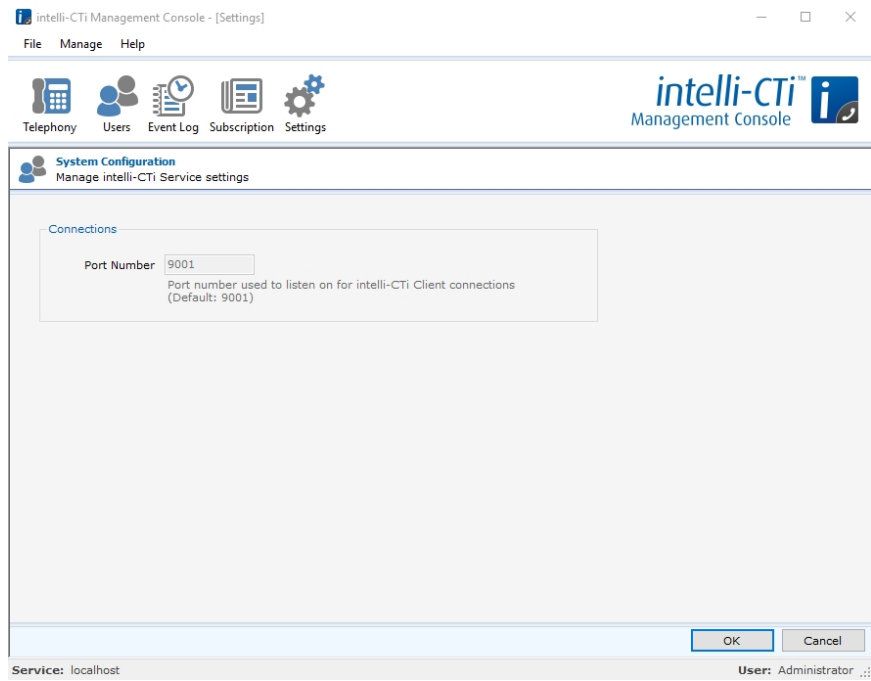
Testing intelli-CTi Service

intelli-CTi Telephony Service test

Note: This test is a true CTI environment test and does not apply to the Virtual Telephony Server™ environment.

The first test is to ensure that the intelli-CTi Service is installed, running and connected to your telephone system.

1. Open up the intelli-CTi Admin Configuration application and click on the **Telephony** toolbar button.

2. Select the **Extensions** section.

3. Make a telephone call using one of the extensions in the list and ensure that its state changes to OFFHOOK.

Installing intelli-CTi for Microsoft Dynamics 365 Integration

About intelli-CTi for Microsoft Dynamics 365 Integration

intelli-CTi for Microsoft Dynamics 365 provides seamless telephony integration into Microsoft Dynamics 365 Web client and Outlook client, providing many telephony features to enhance the usability of your Microsoft Dynamics 365 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 Telephone Call activity and history.
- Automatic recording of call information within Microsoft Dynamics 365 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 365 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/

Downloads

- The intelli-CTi product and integration with Microsoft Dynamics 365 is available for download from the QGate Software website, please contact QGate or your Microsoft Dynamics 365 Business Partner/Reseller for access.

Compatibility

For the latest information regarding the compatibility of intelli-CTi for Microsoft Dynamics 365 and other applications, please visit the compatibility matrix page:

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

Installing intelli-CTi for Microsoft Dynamics 365 Integration

This section outlines the steps required to install and configure intelli-CTi for Microsoft Dynamics 365 into your system.

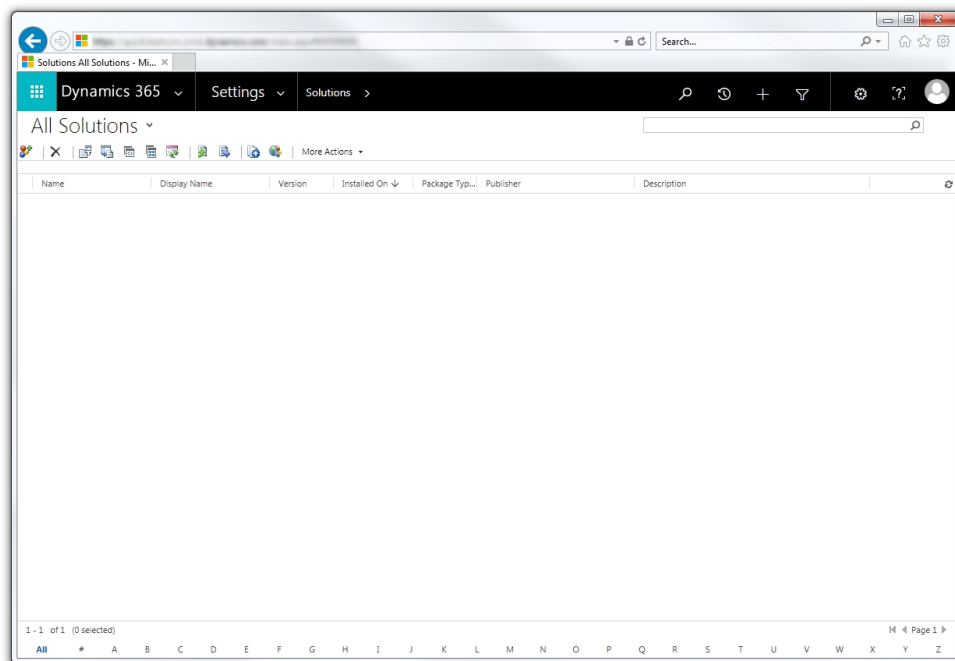### Step 1: Install intelli-CTi Customisations

To support intelli-CTi, there are some customizations that must be imported into CRM. These customizations 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.
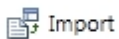
The steps to install the intelli-CTi customizations are as follows:

Install Entity Customisations

1. Open the Microsoft Dynamics 365 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`
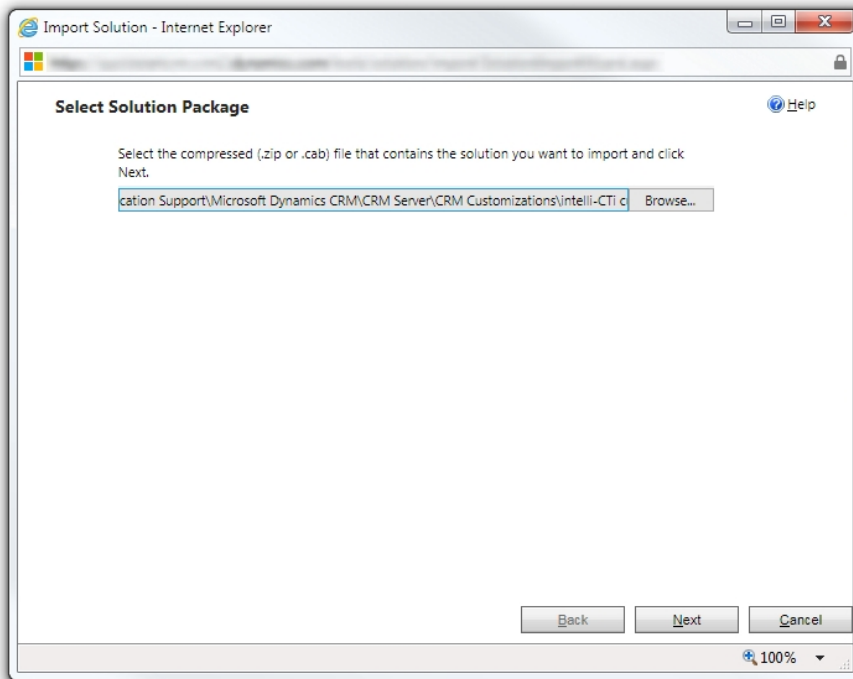
5. Click **Next**, then click **Import** on the Solution Information page.
6. On the Import Options page, tick the box to Activate any processes and enable any SDK message processing steps included in the solution.

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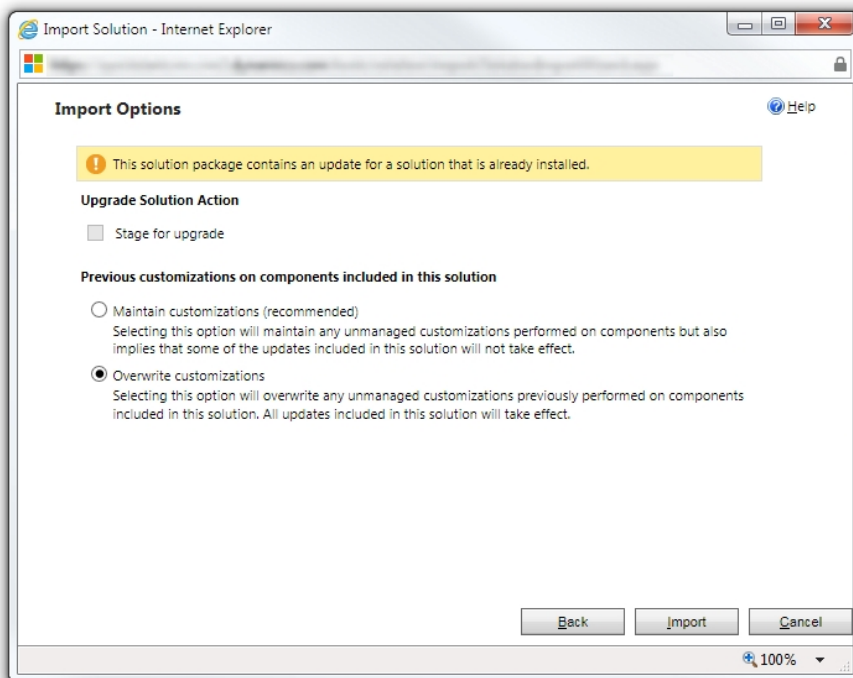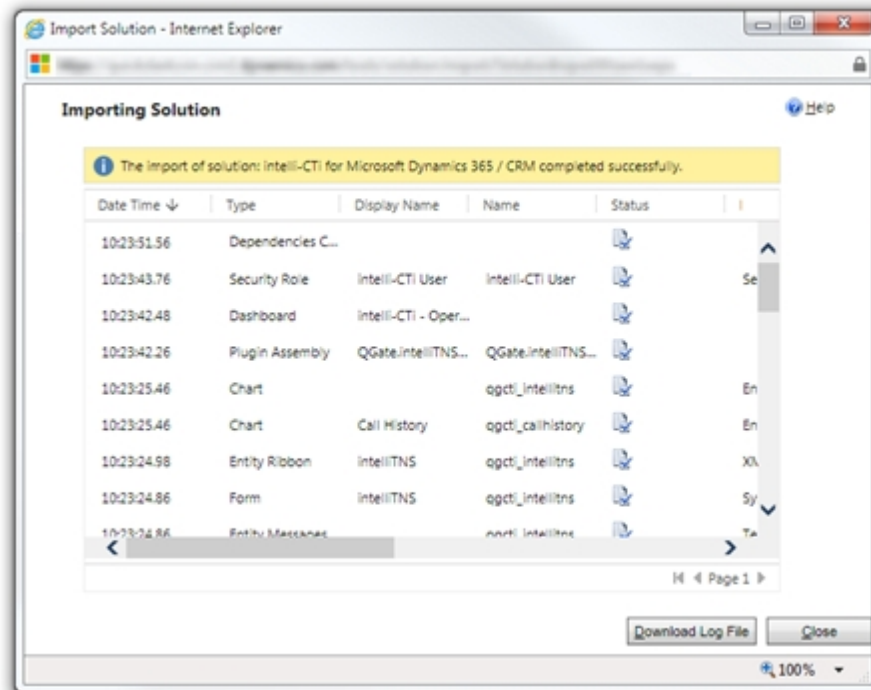

Import Options page (updating an existing installation)

7. Click Next to start the customization import process
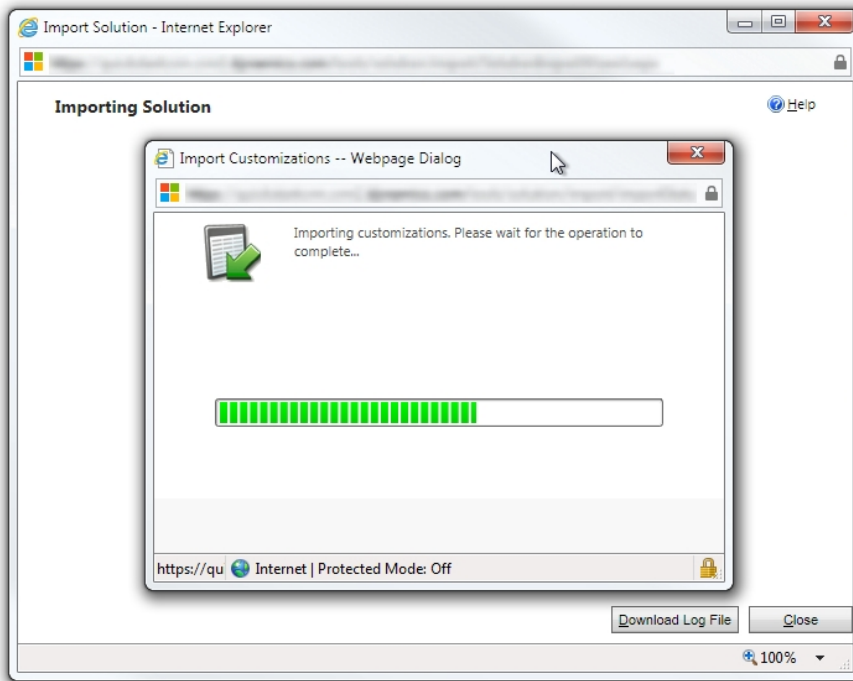
8. Once the import is complete, you will see a log of the new customizations. You can now click Close.

Security Role: intelli-CTi User

In addition to new entities, the customizations also included a new Security Role called "intelli-CTi™ User". You will need to add this Security Role to all Microsoft Dynamics 365 users who intend to use intelli-CTi™.

The customization process is now complete and you can exit Microsoft Dynamics 365.

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.

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 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.
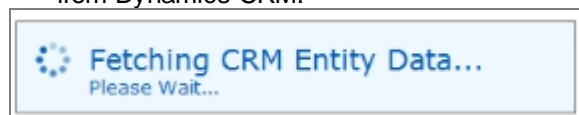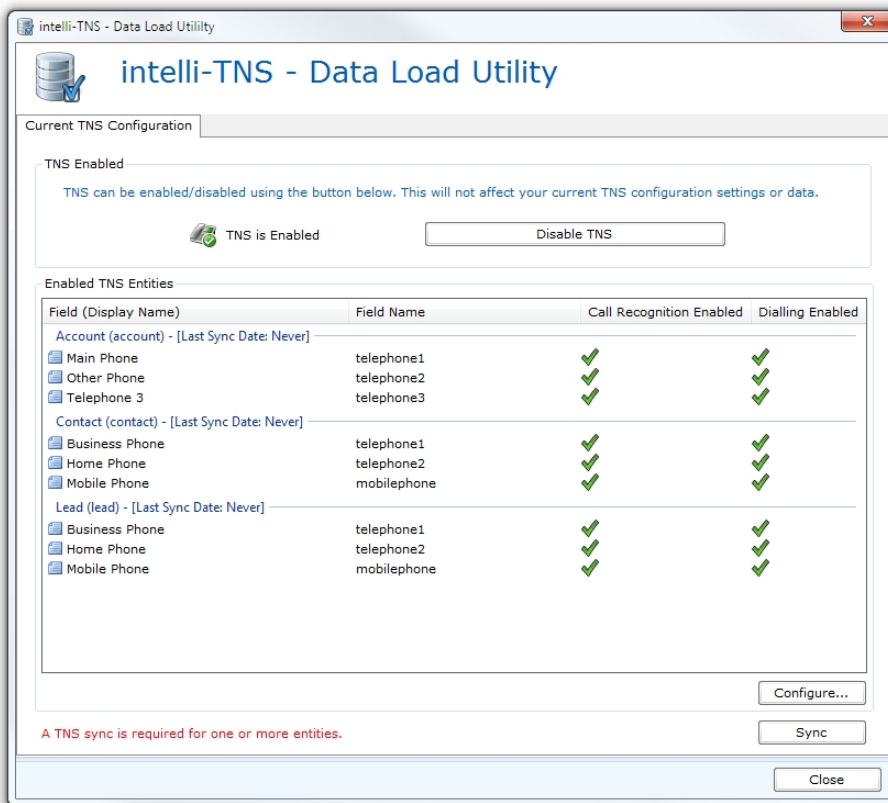
5. By default, the main telephone fields for Account, Contact and Lead will used for both Call Recognition and for Dialing support. If you wish to change this, click **Configure…** to change fields and settings accordingly.
6. Now click **Sync** to move to the next stage.
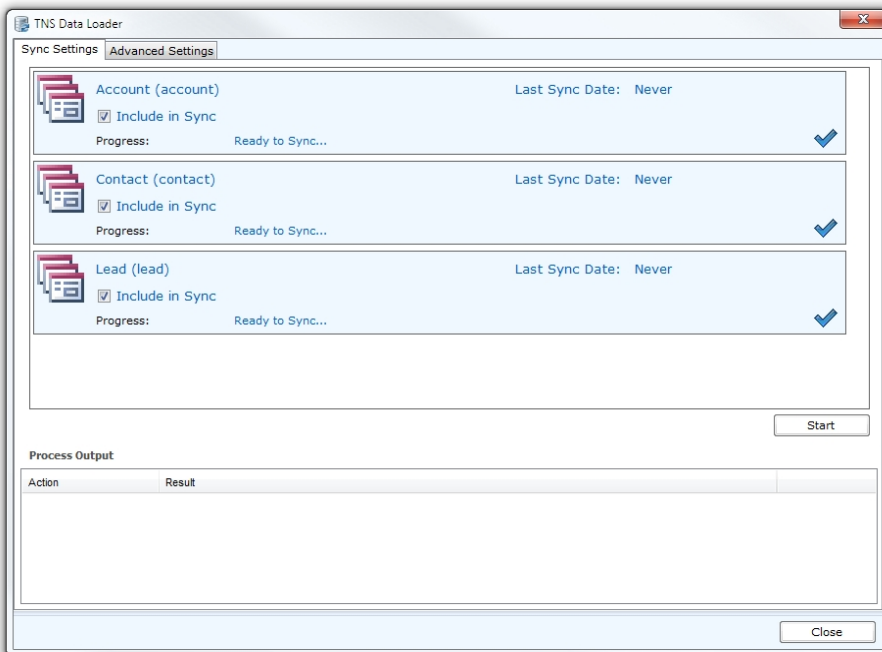
7. Select which entity types you wish to capture into intelli-TNS.
Inbound caller recognition will only function for entities that you have loaded into intelli-TNS.
8. Click the Start button and wait for the data load to complete.
9. Once the data migration process is complete, you can close the intelli-TNS Data Load Utility.

Step 3: Install the intelli-CTi for Microsoft Dynamics 365 Client

The intelli-CTi client application provides the communication between your telephone system and Microsoft Dynamics 365. 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 365 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 365.

### Installation Procedure

1. Run the intelli-CTi Client Setup.exe file from within the **Install** directory of your intelli-CTi™ Installation Package.
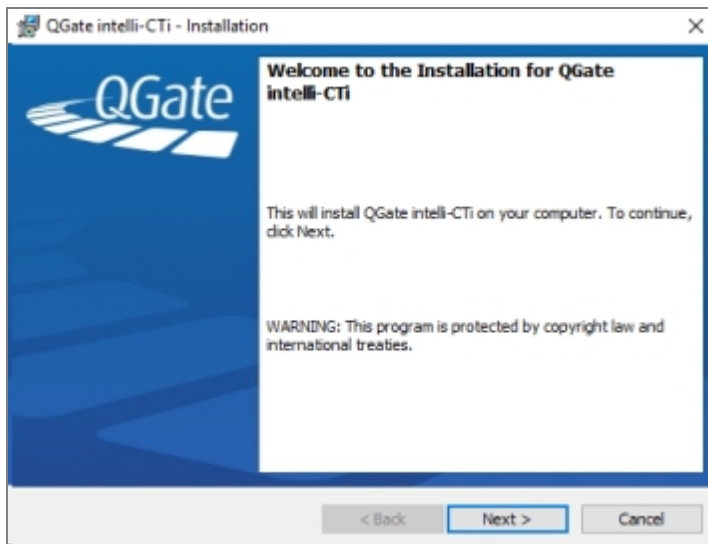

2. From the *Welcome* dialog, click on the Next > button. Note: at any time during the installation procedure, clicking the Cancel button will end the installation and roll-back any files installed to that point.
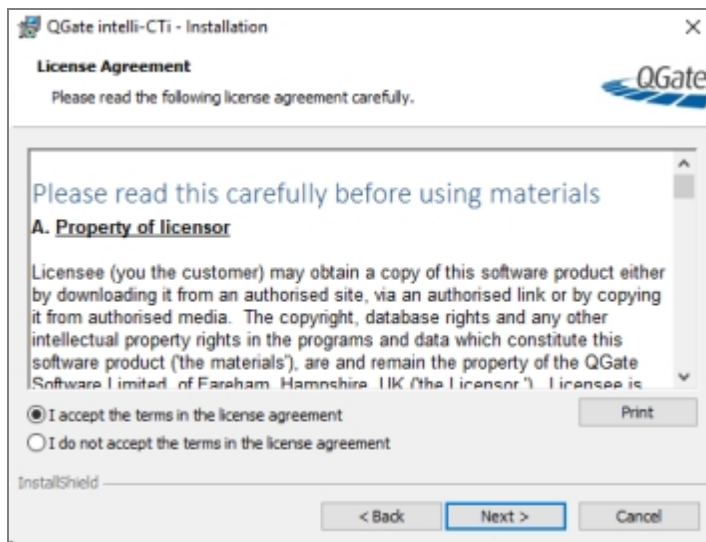
3. Read the license terms. If you do not accept the terms then cancel the installation now. If you do accept the terms then select the **I Accept…** radio button and click the **Next >** button.
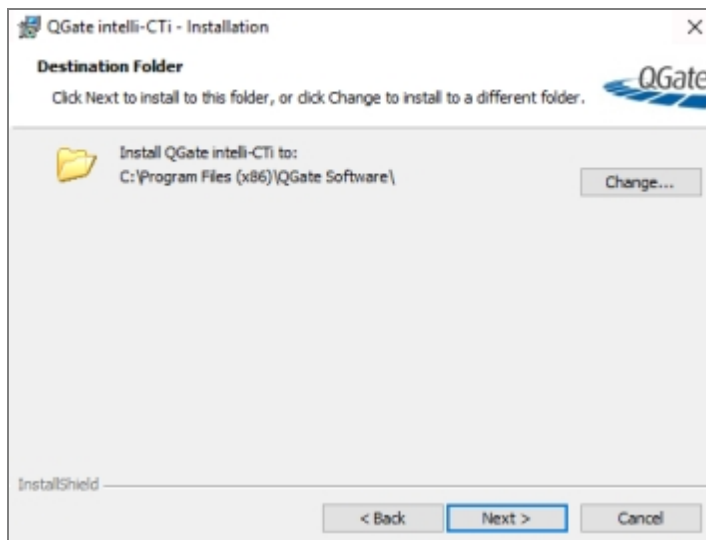
4. From the *Destination Folder* dialog, click on the Next > button to accept the default destination folder or click on the **Change…** button to locate an alternative path and folder.
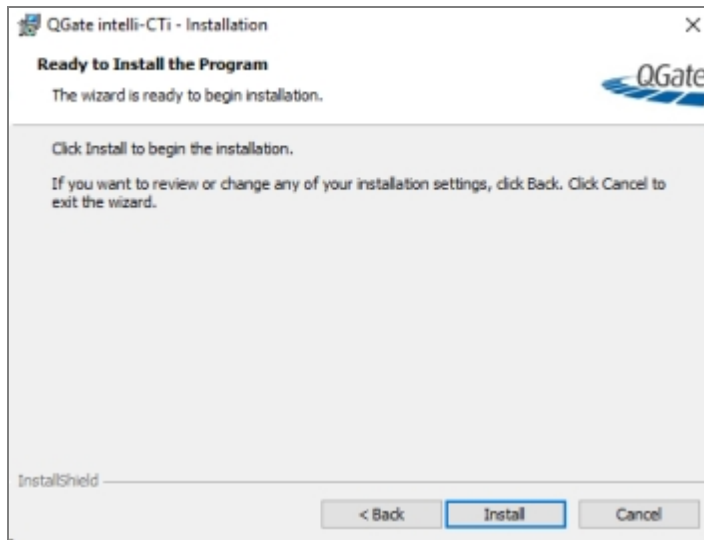
5. When you are ready to proceed, click the **Install** button.
6. After a few seconds, the installer will start to install QGate Breeze. intelli-CTi™ depends on QGate Breeze to provide its user interface.
7. When the install has finished, the following window will be displayed. Click the **Finish** button to complete the installation.
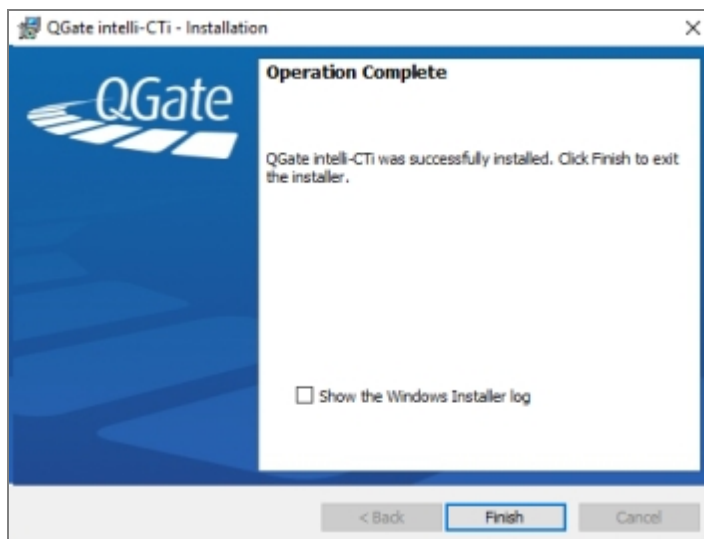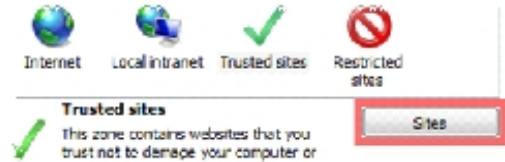
Client Integration Prerequisites (Internet Explorer)

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:

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.

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.
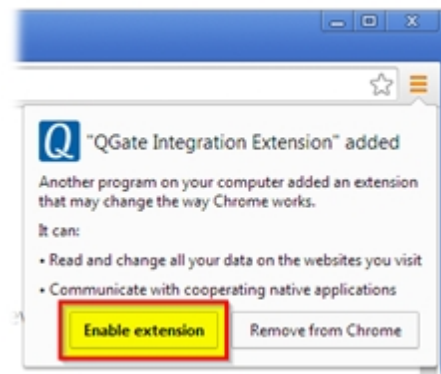
Configuring intelli-CTi Client Settings

This section details how to configure your intelli-CTi installation and the following components:

- Configuring intelli-CTi Connections
- Configuring intelli-CTi System Settings
- Configuring intelli-CTi and QGate Breeze User Settings

Configure Service Connection Type

To configure your intelli-CTi™ System Connection type, Click on Start and run QGate Breeze Settings as Administrator. This process will display the QGate Breeze Configuration Panel.

1. Select **QGate intelli-CTi™ Service** from the Registered Service list, displaying the Service Details of the QGate intelli-CTi™ Service.
2. Selecting **Configure...** will prompt you with the intelli-CTi™ Configuration Panel.
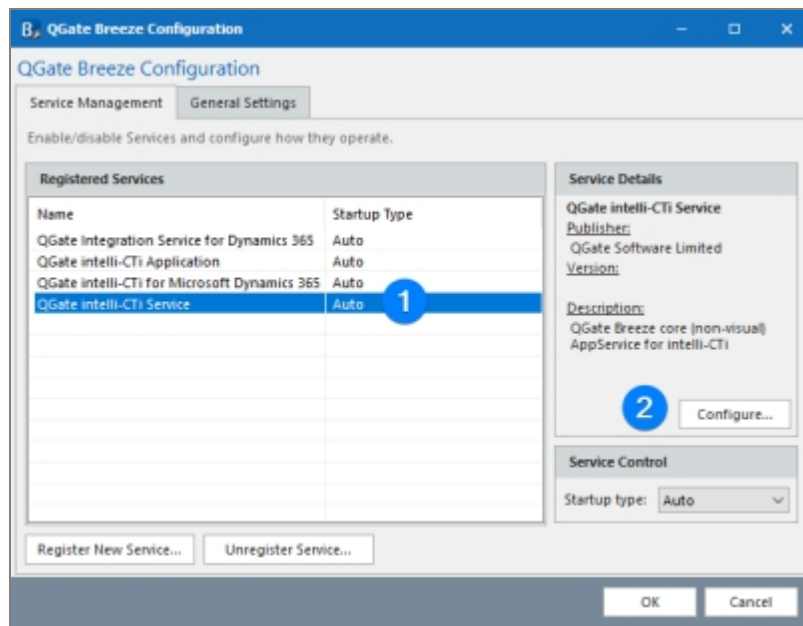
3. From the intelli-CTi™ Configuration Panel you can select one of the following intelli-CTi™ service type modes:
    1. Network Service
    2. Cloud Service
    3. Virtual Telephony Service (Demo)

Note: If you are evaluating the product without a telephone system, you can skip this section and go to the Virtual Telephony Service (Demo).

Network Service

The intelli-CTi™ product comes with a Network Service, which allows connecting to an on-site server running the intelli-CTi™ Service. To connect to a Networked intelli-CTi™ Service do the following:

1. After navigating to the connection service, select **Network Service** from the **intelli-CTi™ Service Type** drop down menu.
2. Enter your intelli-CTi™ Service **DNS name** or **IP Address** for connecting to the Service.
3. Specify the type of authentication you would like to use to connect to the intelli-CTi™ Service (**Windows Authentication** or **Specific intelli-CTi™ User**). If you specify to use a intelli-CTi™ User you will be required to enter the user name and password for authentication.


4. When you're ready, clicking **Connect...** will attempt to make a connection to the service running the intelli-CTi™ Service. If a connection is successful a message will be displayed, for any reason to why a connection would not connect would also be displayed on failure to connect.
5. Some additional settings related to connecting to your intelli-CTi™ Service can be found by clicking **Show Additional Settings**.

Additional Settings

If your intelli-CTi™ Service is running on a non-default port, you can adjust the connection port from the Additional **Settings** after clicking **Show Additional Settings**.
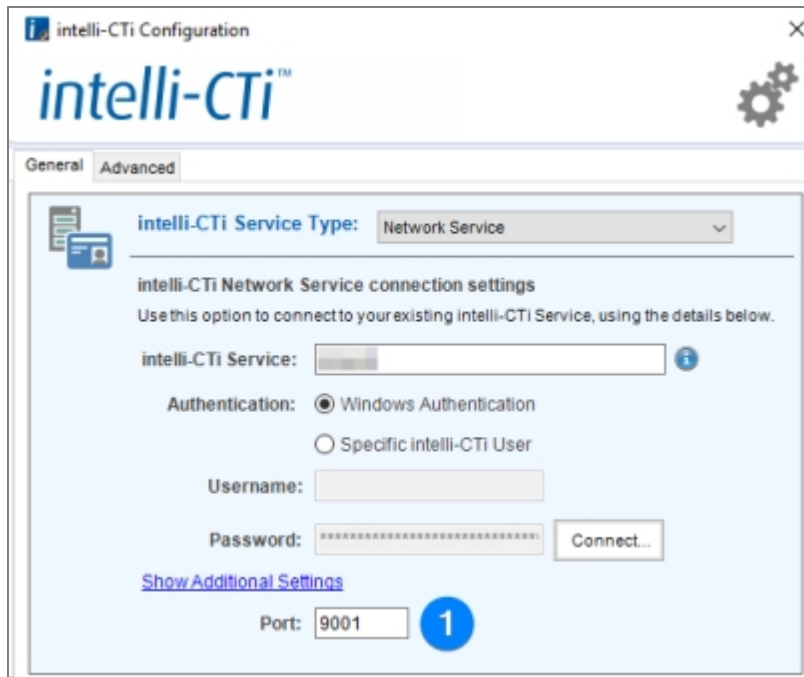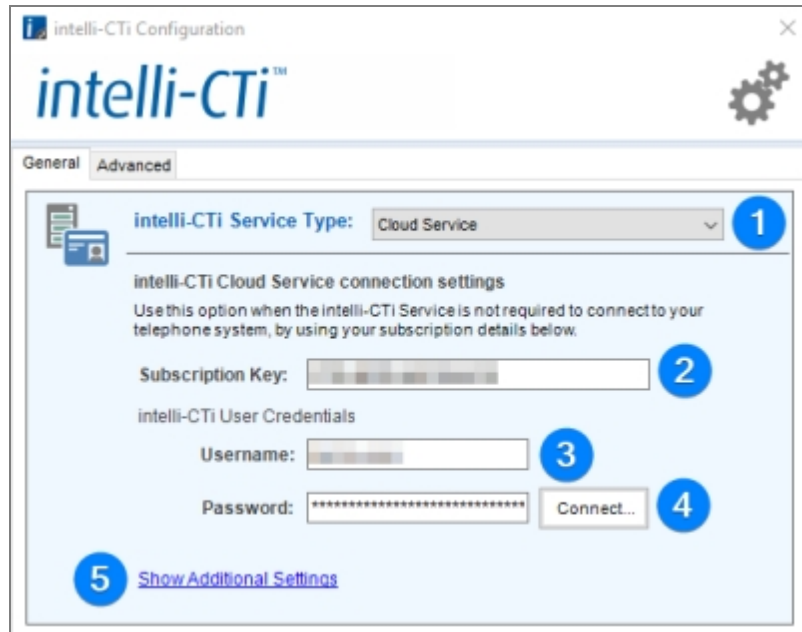
Clicking **OK** will close the intelli-CTi™ Configuration panel, if you have **QGate Breeze** the configuration panel will ask if you would like to restart now or later.

Cloud Service

The intelli-CTi™ product comes with an Cloud Service provided by QGate, for customers of hosted telephone systems, which allows connecting to QGate's hosted service running the intelli-CTi™ Service. To connect to the hosted intelli-CTi™ Service do the following:

1. After navigating to the connection service, select **Cloud Service** from the **intelli-CTi™ Service Type** drop down menu.
2. Enter your **intelli-CTi™ Cloud Service** Subscription Key.
3. Specify the **username** and **password** to authenticate with the Cloud Service, username and password are the only authentication methods currently available for cloud authentication.

4. When you're ready, clicking **Connect...** will attempt to make a connection to the service running the intelli-CTi™ Service. If a connection is successful a message will be displayed, for any reason to why a connection would not connect would also be displayed on failure to connect.
5. Some additional settings related to connecting to your intelli-CTi™ Service can be found by clicking **Show Additional Settings**.

Additional Settings (Additional Settings)

1. If your intelli-CTi™ Cloud Service is running on a non-default addressing (you would be specified if so), you can adjust the **Addressing** and **Literal Addressing**.
2. If your intelli-CTi™ Cloud Service is running on a non-default port (you would be specified if so), you can adjust the connection port.

Virtual Telephony Service (Demo)

The intelli-CTi™ product comes with a free Virtual Telephony Server (VTS), which allows demonstration, training and development to be carried out without being connected to a real telephone system.

If you simply wish to demo intelli-CTi™ (not connected to a real telephone system), the intelli-CTi™ VTS mode provides the perfect setup to simulate telephony activity and demonstrate intelli-CTi™ working with your CRM system.

1. After navigating to the connection service, select **Virtual Telephony Server (Demo)** from the **intelli-CTi™ Service Type** drop down menu.
2. Clicking **OK** will close the intelli-CTi™ Configuration panel, if you have QGate Breeze the configuration panel will ask if you would like to restart now or later.
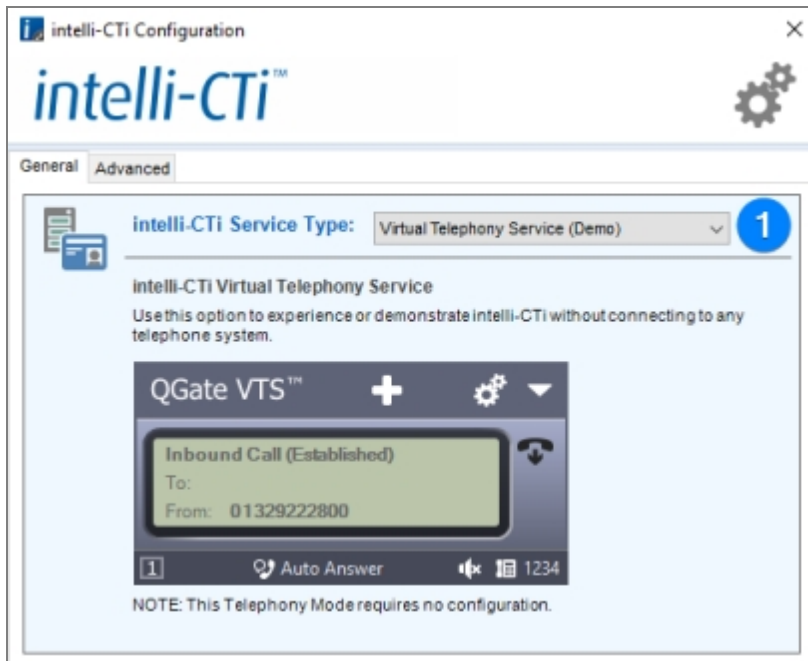
Telephony Connection Types

The intelli-CTi Telephony Connections are the components of intelli-CTi which enable connectivity to your telephone system / CTI service.

The following intelli-CTi Telephony Connections available:

- **intelli-CTi Telephony Service:**
  This connection type provides support for telephone systems that are connected using the intelli-CTi Service. All the components required for this connection are installed as part of the standard intelli-CTi client software installation.

- **intelli-CTi Skype for Business Client:**
  This connection type provides support for Microsoft Skype for Business. This option requires Skype for Business to already be installed, configured and running before use.

- **intelli-CTi Go Integrator (for Broadworks) Client:**
  This connection type provides support for the Go Integrator (for Broadworks) client. This option requires the Go Integrator client to already be installed, configured and running before use.

- **Virtual Telephony Server™ (VTS):**
  This connection type provides a virtual telephony switch system.

  The key aspect of the VTS connection type is to provide a virtual telephony environment in which to develop and test your CTI solutions, without the need for expensive hardware. Whats more, with the VTS technology, you can perform presentations of your CTI solutions anytime, anywhere, all from a single laptop computer.

  The VTS technology is a free component of the intelli-CTi product. For more details on how to use the Virtual Telephony Server, _see the intelli-CTi User Guide_.
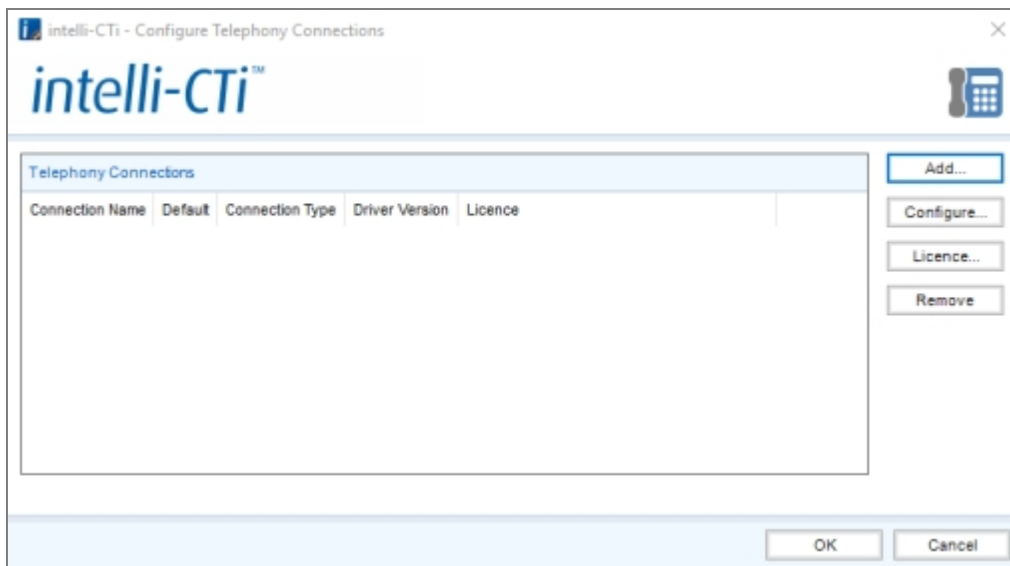
- **Other Connection Types:**
  Other connection types may also be available. Please contact QGate Software for more information.

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Configure Telephony Connections

Once you have connected successfully connected to a intelli-CTi service (or have a selected to use the VTS/Demo mode)

1. Click on the Configure intelli-CTi Connections… button to open the *Configure Telephony Connections* window.


2. Click the **Add** button to add a telephony device to the list. This will bring up the *Select a Telephony Connection Type* window, where you can choose what type of connection you are adding.
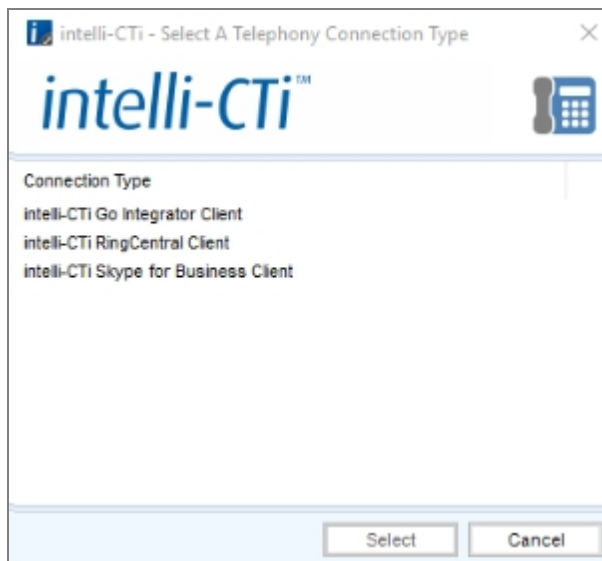
3. Click on the Configure… button to configure the currently highlighted connection type.
    o If you are configuring an intelli-CTi Telephony Service connection, then see Configuring intelli-CTi Telephony Service connections for more information.
    o You do not need to configure Virtual Telephony Server connection type, as it comes with default

settings.
4. Click on the Remove… button to remove a device from the list.
5. Click on the Advanced tab.
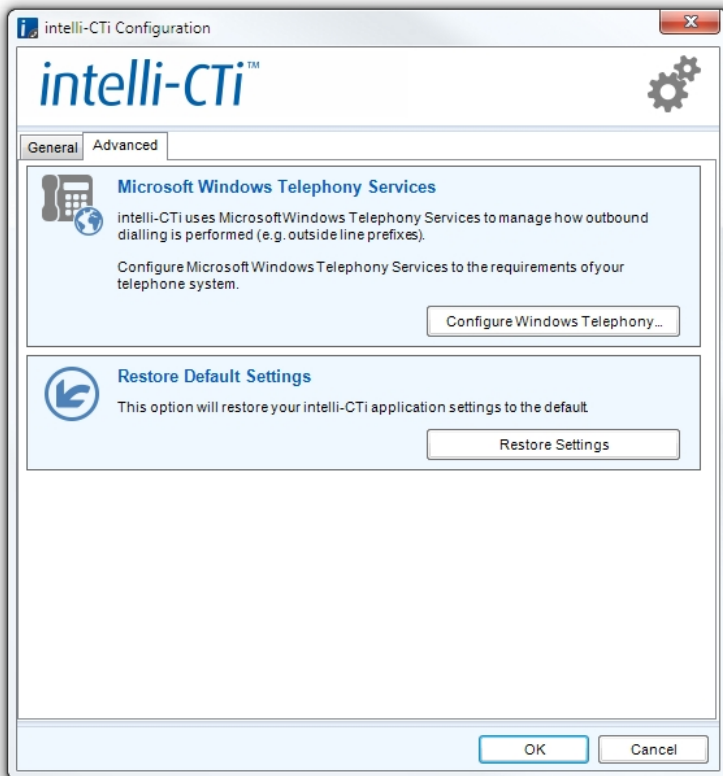
6. On the Advanced settings tab, you can Configure Windows Telephony. This section provides the ability access to the Microsoft Windows Telephony Services configuration (such as client-side dialing rules for advanced setups).
7. You can also Restore Default Settings. This action will restore your intelli-CTi application settings back to the default.
8. Click the OK button to close the intelli-CTi Configuration dialog.
If you have made changes to your intelli-CTi configuration, these changes will not take effect until you next restart your intelli-CTi application.

Configuring intelli-CTi Telephony Service connections

The following steps outline how to configure an **intelli-CTi Telephony Service** connection type.

1. Start the intelli-CTi Settings configuration program from the Windows Control Panel.
2. Click the **Configure intelli-CTi Connections...** button on the General tab.
3. Highlight the **intelli-CTi Telephony Service** connection and click the **Configure...** button.
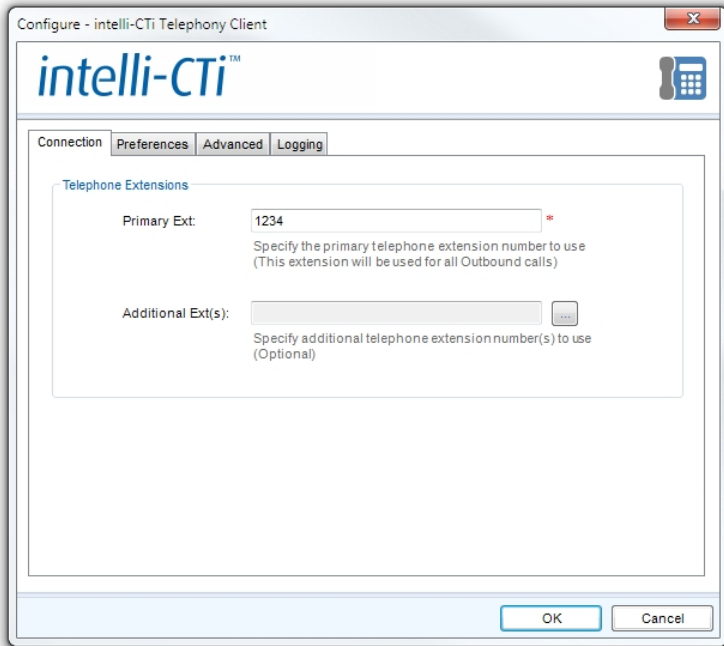
4. Enter or change the extension number that you wish to monitor.
   o If required, you can also specify **Additional Extensions** to be monitored.
     Note: Primary extension will always be used for Outbound calls.
5. Click the **Close** button to close the Configure – intelli-CTi Telephony Client dialog.
6. Click the **Close** button to close the Configure Telephony Connections dialog.
7. Click the **OK** button to commit your changes and close the intelli-CTi Configuration window.

Note: You must restart intelli-CTi for any configuration changes to take effect.

Configuring intelli-CTi and QGate Breeze User Settings

The user interface of intelli-CTi is provided by QGate Breeze. To configure QGate Breeze, proceed as follows:

1. Open up the Windows Control Panel.
2. Select the *QGate Breeze Settings* item, which will present the following window:
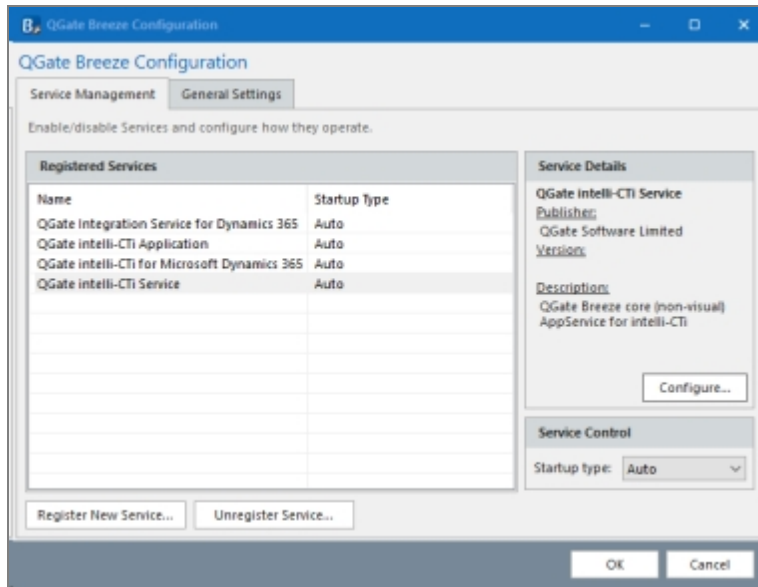
3. Select the **QGate intelli-CTI Application** service from the list.
4. Click the **Manage...** button, which will display the following window:
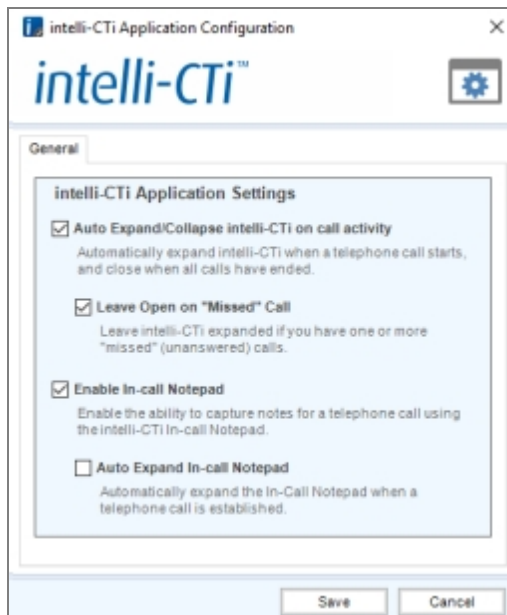
5. Select whether you would like the Breeze/intelli-CTi side-bar to expand automatically when there is some activity on your telephone line.
6. Click the Save button to save your changes and close the window.
7. If you select to Manage the QGate intelli-CTi Service, you will be taken to the same window as in **Error! Reference source not found.** on page **Error! Bookmark not defined.**.
8. Select the **General Settings** tab:
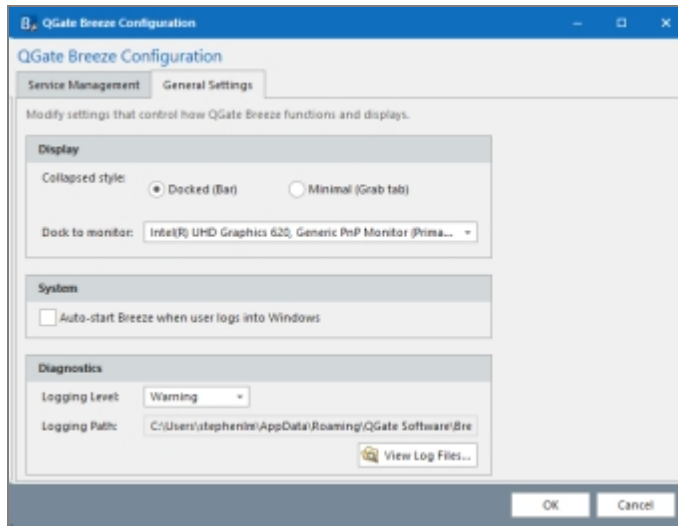
9. Select whether you want Breeze shown as a bar on the side of the screen:


or as a tab on the side of the screen:

10. If you have more than one monitor, you can select which one Breeze will display on.
11. You can also enable Breeze to auto-start when the current user logs into Windows.
12. When you have finished, click the OK button.

Configuring the intelli-CTi for Microsoft Dynamics 365 Client

For the intelli-CTi™ integration with Microsoft Dynamics 365 to work, you have to configure the intelli-CTi™ client so that it can find your Microsoft Dynamics 365 data service. To do this, proceed as follows:
1. Run the QGate Breeze Configuration from the Windows Start Menu as an Administrator ("`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 365** from the list and click the **Configure...** button.
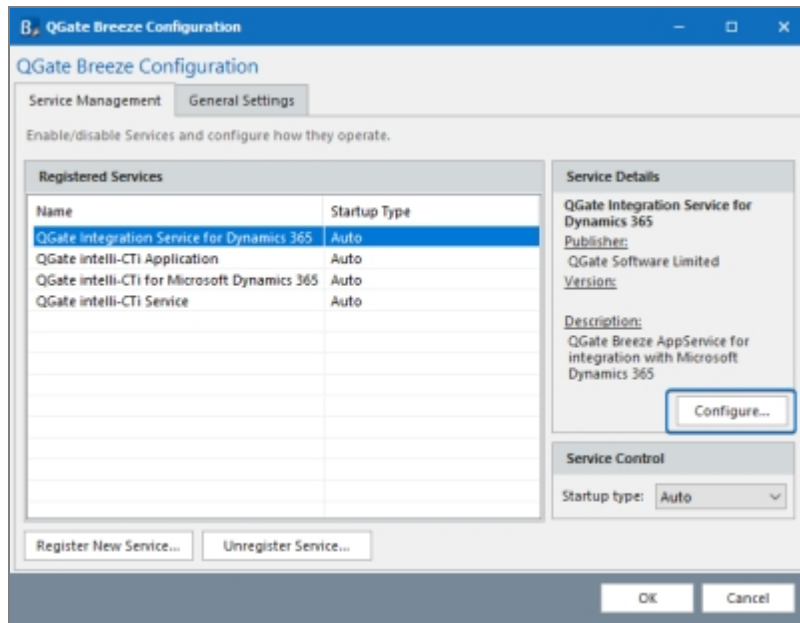

3. Choose the CRM Client application you wish intelli-CTi™ to integrate with.

4. Select the target Microsoft Dynamics 365 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.
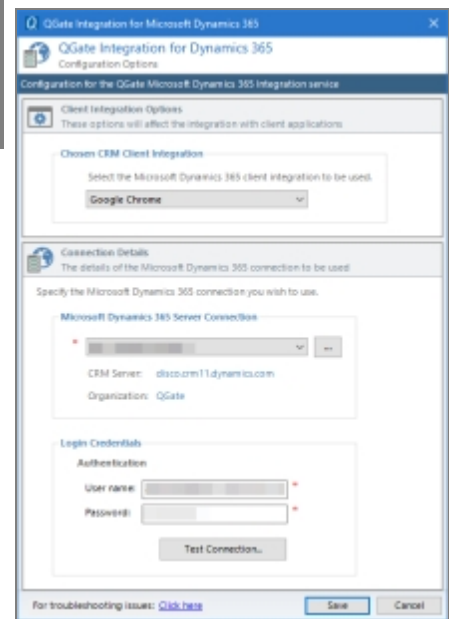
You can also manage the functionality of intelli-CTi™ for Microsoft Dynamics 365 (Call Wrap-up, Call History/Logging, etc). To do this, proceed as follows:

1. Run the QGate Breeze Configuration from the Windows Start Menu as an Administrator ("`All Programs > QGate Breeze > QGate Breeze Settings`"). This will open the QGate Breeze Service Management screen.

2. Select **QGate intelli-CTi™ for Microsoft Dynamics 365** from the list and click the **Configure...** button.
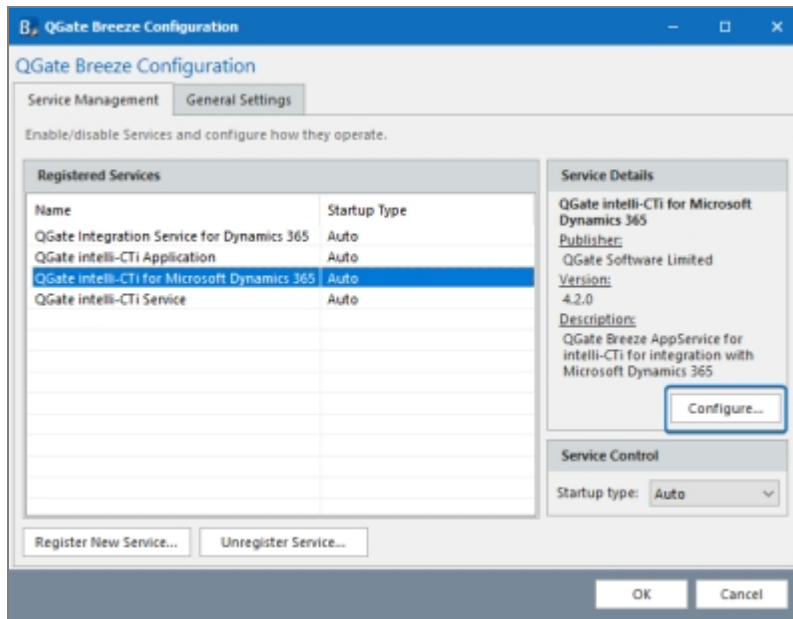
3. Here you can manage how you would likeintelli-CTi™ for Microsoft Dynamics 365 to function.
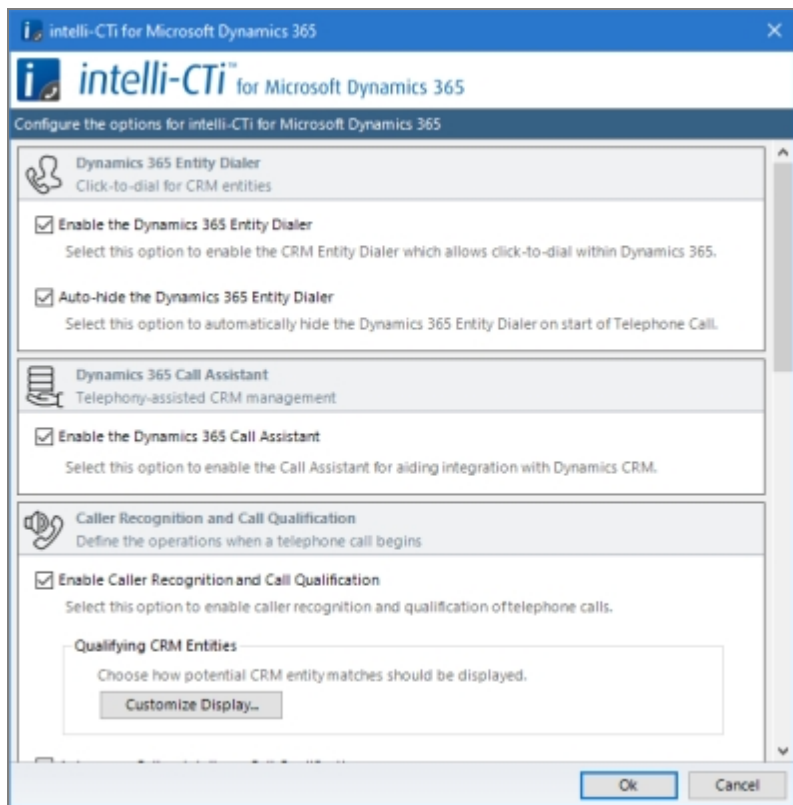
Your client application is now ready to use. See the *intelli-CTi™ for Microsoft Dynamics User Guide* for more information about how to use intelli-CTi.

Testing intelli-CTi Client

Installation / Set-up Check List

To ensure your intelli-CTi™ installation is complete and ready for testing, the following check list items should have been completed:

- Installation of the intelli-CTi™ Service
- Installation of the intelli-CTi™ client
- Configuration of intelli-CTi™ system settings
- Configuration of Windows Telephony (if applicable)

Testing the intelli-CTi Installation

To test that the intelli-CTi application has been successfully installed and configured, ensure the following tasks can be performed:

Client Initialisation Test

Start your QGate Breeze application from the icon provided
(Start, All Programs, QGate Breeze, QGate Breeze…)

Ensure your intelli-CTi™ application can start successfully.
If initialization was successful, continue to the next test.

Connection Test

Firstly, you must ensure the intelli-CTi™ application can successfully connect to your intelli-CTi™ Telephony Service.

Make sure that your extension number is shown in the intelli-CTi™ window. If your extension number is shown then this indicates that the intelli-CTi™ client has connected to the intelli-CTi™ Telephony Service successfully.
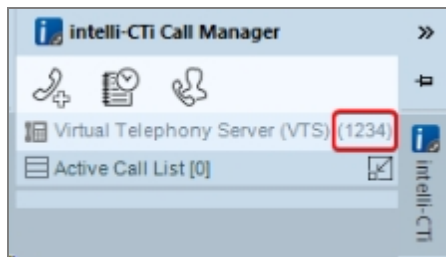
If the connection is reported as being successful, continue to the next test. If not, consult the troubleshooting section.

Dial Out Test

Once the previous tests have been completed successfully, the final test is to dial out. Using the telephone handset keypad, dial a valid destination number.

Tip: We recommend the destination number for this test is an extension number on your telephone system, preferably within earshot, to ensure you are fully aware of the results.

Once the dialing process is complete, a new call will be displayed in the intelli-CTi window.

When you hang up the call, the display in intelli-CTi will indicate that the call is now idle.

If this test was successful, you have successfully installed and configured intelli-CTi. If not, consult the troubleshooting section.

Uninstalling intelli-CTi for Microsoft Dynamics 365 Integration

This section outlines the steps required to uninstall intelli-CTi for Microsoft Dynamics 365, 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:
   o **QGate intelli-CTi for Microsoft Dynamics 365**
   o **QGate intelli-CTi**
   o **QGate Breeze**
5. Done
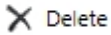
Uninstalling the intelli-CTi Service

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:
   o **QGate intelli-CTi Service**
   o **QGate intelli-CTi Device Service**
5. Done

Uninstall the Dynamics Customisations

Uninstall the Dynamics Solution

1. Open the Microsoft Dynamics 365 web client.
2. Select **Settings** then **Solutions** from the navigation bar on the left-hand side of the screen.
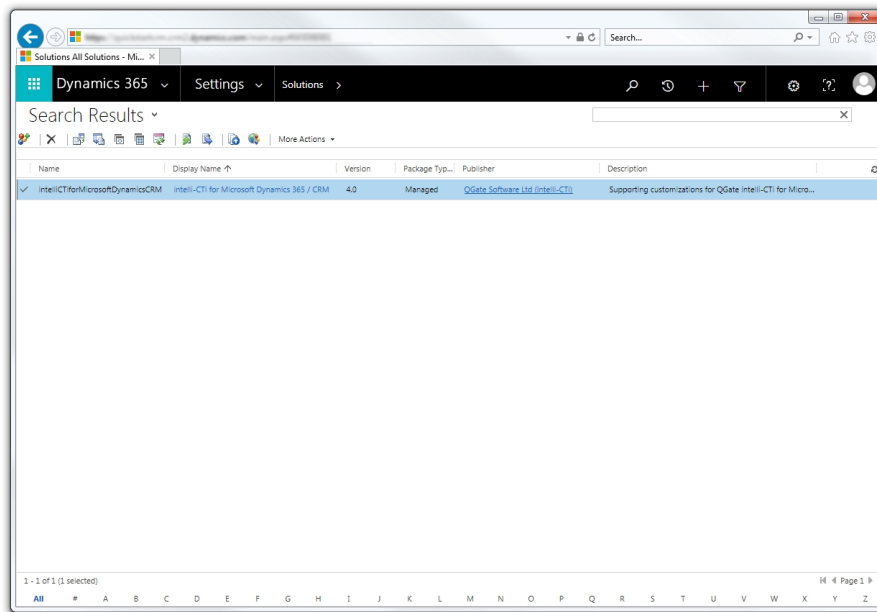
3. Select the "intelli-CTi for Microsoft Dynamics 365" Solution from the list.
4. Click on the Delete button.

   ✕ Delete

5. Confirm that you want to remove the Solution.
6. Done

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/

Troubleshooting

For troubleshooting common problems and scenarios relating to intelli-CTi, please visit the troubleshooting page:
www.intellicti.com/help/troubleshooting/

System Requirements

For information regarding the minimum system requirements for installing and running intelli-CTi, please visit the product system requirements page:
www.intellicti.com/help/sysreqs/

Product Information

For more information about intelli-CTi, 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.
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 license.

Systems Integration

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