



*intelli-CTi*TM for Microsoft Dynamics 365

Version 4.2

intelli-CTi for Microsoft Dynamics 365 - User Guide

Document Version 1.0

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Overview

This document guides you through the processes you will use on a day to day basis while using intelli-CTi for Microsoft Dynamics CRM. This includes:

- Receiving incoming telephone calls.
- Placing outgoing telephone calls.
- Viewing telephone call history.

Who Should Read this Document

This document is intended for users of intelli-CTi for Microsoft Dynamics CRM.

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 installing and configuring intelli-CTi for Microsoft Dynamics CRM, see the *intelli-CTi – Microsoft Dynamics CRM Getting Started 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.

Customer Recognition

intelli-CTi can provide the function that advises you who is calling and displays their records automatically. By giving immediate access to your customer records, intelli-CTi saves both caller and user time, enhances customer servicing and increases business productivity.

Customer History

intelli-CTi can record a full history of in and outbound calls, recording the time, and date of the call and allowing the user to type full details of the conversation.

Opening intelli-CTi

Starting intelli-CTi/Breeze

intelli-CTi will be automatically activated when you dial your first phone call or you can start it manually.

- From the Windows Start button select All Programs > QGate Breeze > QGate Breeze.

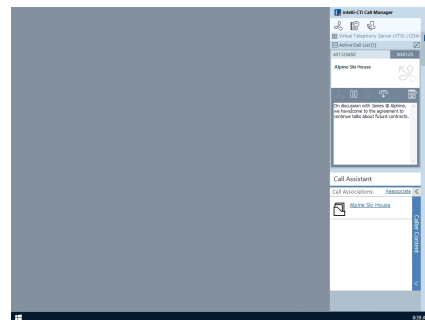
What is QGate Breeze?

QGate Breeze is a system which contains many applications running on your Windows desktop and provides a common place for each of them to reside.

QGate Breeze also provides a common desktop presentation in the form of the Breeze desktop sidebar. The sidebar provides users with a dynamic and unobtrusive display of information and control of Breeze applications.

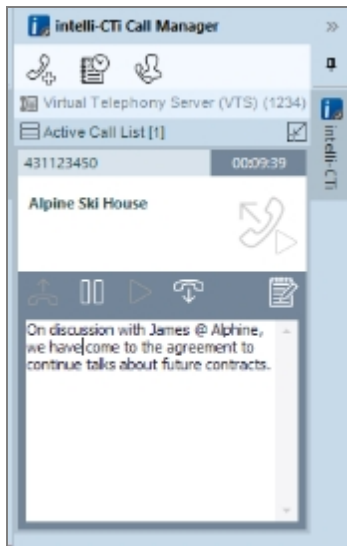


Breeze Sidebar Collapsed



Breeze Sidebar Expanded

intelli-CTi running within QGate Breeze



intelli-CTi in Breeze

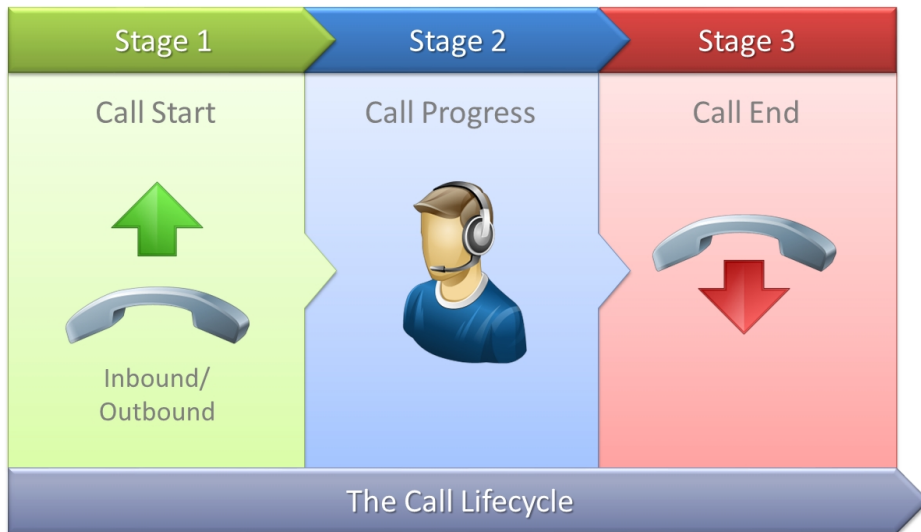
intelli-CTi uses the QGate Breeze framework as both the hosting container for the intelli-CTi services and the visual presentation of the Breeze Desktop sidebar.

Leveraging the power of the Breeze Desktop sidebar, intelli-CTi is able to dynamically present telephone call information and call control during a telephone call.

Furthermore, the Breeze Desktop sidebar provides the ability to dynamically spring out during telephony activity (e.g. incoming call) and then automatically collapse away when not required.

The Call Lifecycle

The lifecycle of every telephone call can be broken down into three distinct stages; the beginning, the middle and the end of a call.

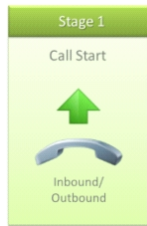


The Call Lifecycle

The actions and events that could take place in each stage are very different. For example, a process could run at the start of the call to lookup the caller based on their telephone number.

intelli-CTi for Microsoft Dynamics CRM offers several key features, covering all three stages of the telephone call lifecycle within its integration.

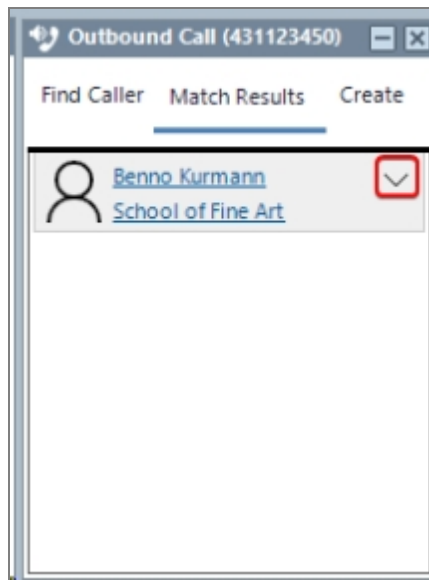
Stage 1 – Call Beginning (Receiving an Inbound Call)



An incoming call could represent a potential sale, a support query or something else equally important to your business. Knowing extensive details of who is calling before you even pick up the telephone is one key feature of intelli-CTi for Microsoft Dynamics CRM.

Automatic Caller Recognition

On receipt of an inbound telephone call, intelli-CTi with integration to Microsoft Dynamics CRM will attempt to qualify the telephone call by matching the CLI (Caller Line Identifier – the number the caller is calling from) with the telephone numbers stored within Microsoft Dynamics CRM. If enabled, this will display the Inbound Call information panel upon the Breeze bar. The content of which will vary dependent upon the nature of the call being recognised.



TIP

You can expand the details of matched callers to show more information.

Automatic caller recognition (inbound call)

In order to associate the current call with one of the entity matches found, simply click on their name. Calls must be qualified to begin the call management process – see *Call Qualification* on page 11.

CRM Caller Types

During the inbound call process, the following CRM entity types may feature:

	CRM Contact	When the number of the call in progress either directly matches a CRM Contact or the Contacts at a matched Account.
	CRM Lead	When the number of the call in progress matches a CRM Lead.
	CRM Account	When the number of the call in progress matches a CRM Account which has no Contacts.

No Automatic recognition?

If the incoming telephone number is not recognised as an existing number in Microsoft Dynamics CRM, the user can manually associate the call with an existing Contact or Account.

Use the **Find Caller** tab to search for the caller. You can search across Accounts, Contacts and/or Leads.

Once you have found a match, you can associate the call by clicking on the caller's name or company.

Calls must be qualified to begin the call management process – see *Call Qualification*

Find Caller Form

Matches Found

Manual Creation

If there are no matches at all for the caller, you can use the **Create Caller** tab to create them as a new Account, Contact or Lead – without the need to go into Microsoft Dynamics CRM.

Once you have filled in the required fields (telephone fields will be automatically populated), click the **Create** button. The newly-created entity will automatically open in Microsoft Dynamics CRM.

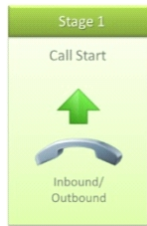
Calls must be qualified to begin the call management process – see *Call Qualification*

Call Qualification

It is important to always qualify a telephone call by associating it with the appropriate Account, Contact or Lead. Whether this is as result of a direct match on an Inbound Call lookup or by manually creating the entity, call qualification is key to progressing to the next stage in the call lifecycle.

If you do not qualify the call; any notes or other related data created during the call will not be automatically linked with the relevant entity and could potentially be lost.

Stage 1 – Call Beginning (Making an Outbound Call)

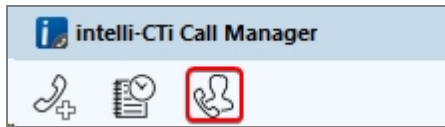


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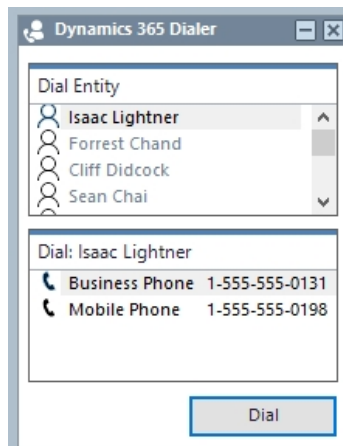
Dial using the CRM Dialer

The simplest and easiest way to dial CRM Accounts, Contacts and Leads is by using the intelli-CTi CRM Entity Dialer. The CRM Entity Dialer can be accessed from the intelli-CTi Call Manager toolbar.



Toolbar button to show the CRM Entity Dialer

The Dynamics CRM Dialer displays telephone numbers for the Account, Contact or Lead currently active in CRM (or the “Regarding” person for Activities, Cases and Opportunities). It allows you to choose a number to dial either by selecting it and clicking the **Dial** button, or by double-clicking the number entry.

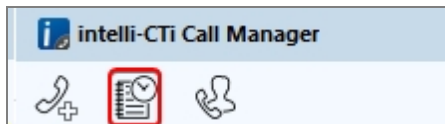


CRM Entity Dialer for a Contact

A history of the most recently accessed entities is kept (displayed in grey), allowing you to quickly dial someone without having to find them in CRM.

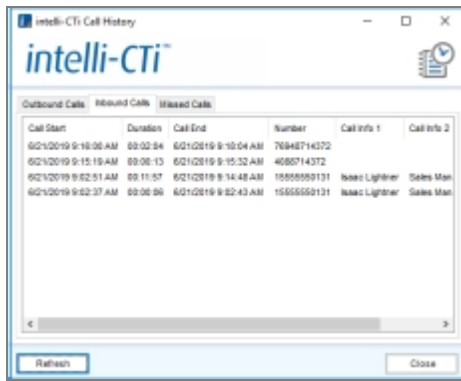
Dial using the intelli-CTi Call History

intelli-CTi provides a client-side Call History which records outbound, inbound and missed calls. The intelli-CTi Call History can be accessed from the intelli-CTi Call Manager toolbar.



Toolbar button to show the intelli-CTi Call History

As well as providing a detailed history of telephone calls, the Call History screen allows you to quickly dial someone directly from the list.

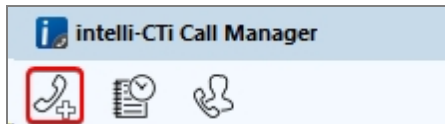


intelli-CTi Call History

This is particularly useful when calling back a “missed” call with a simple double-click.

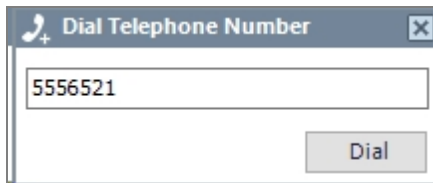
Dial using the Manual Dialer

intelli-CTi provides a client-side Call History which records outbound, inbound and missed calls. The intelli-CTi Call History can be accessed from the intelli-CTi Call Manager toolbar.



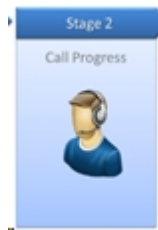
Toolbar button to show the intelli-CTi Manual Dialer

The Manual Dialer allows you to type (or Paste) in a telephone number and dial it with a click of a button.



intelli-CTi Manual Dialer

Stage 2 – Call Progress

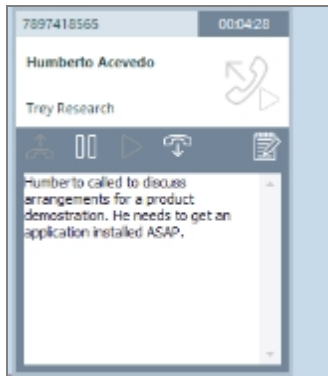


Once the call has been answered and has been “qualified” (i.e. associated to a CRM entity), you progress to the next stage in the lifecycle of a telephone call.

With a “qualified” call, intelli-CTi for Microsoft Dynamics CRM allows you to assign valuable information directly to the caller as well as present associated records, without the need to delve into CRM.

Call Notepad

Details of your conversation with the caller can be captured while on the telephone by selection of the intelli-CTi **Show/Hide In-Call Notes** button on the intelli-CTi call panel.



intelli-CTi Call Notepad

Here you can record details of the telephone conversation and additional notes while on the phone. The call notes entered will be automatically brought into the Telephone Call Wrap-up screen when the call ends (if enabled).

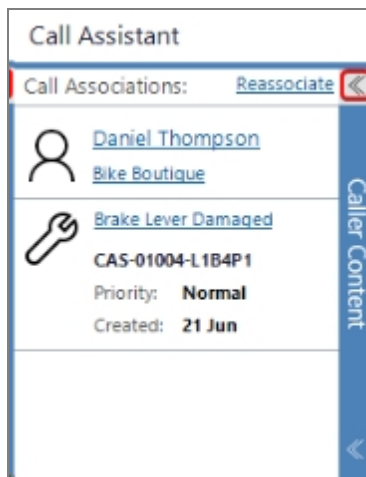
Dynamics CRM Call Assistant

The Dynamics CRM Call Assistant provides easy access to important CRM information about the caller, such as open Activities, Cases and/or Opportunities. In addition, the agent can navigate to any of these (or create new ones) straight from the Call Assistant, throughout the life of the telephone call.

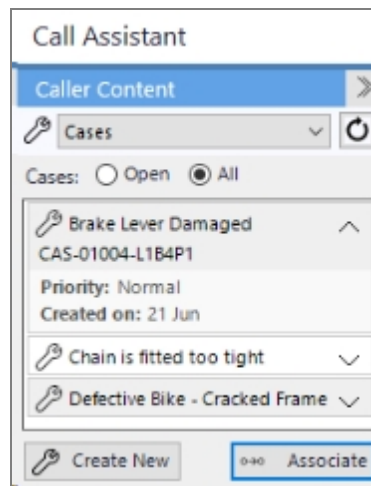
Any CRM entity associations with the current call are displayed within the “Call Associations” section of the Dynamics CRM Call Assistant.

For example: the Account, Contact or Lead that has been associated to the call. It is possible to associate other CRM entities, such as Cases and Opportunities.

Further content relating to the current caller can be accessed by expanding the “Caller Content” bar at the right-hand side. This will show various related data relating to the current caller such as: Activities, Cases and Opportunities.



Dynamics CRM Call Assistant



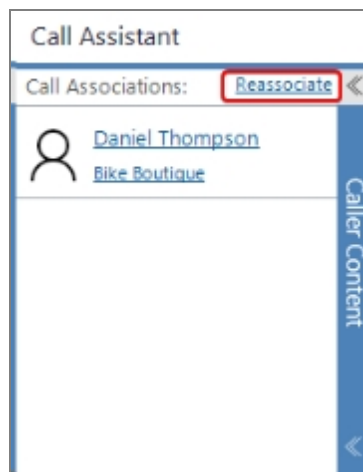
Content section

You can associate related Caller Content to the current call by simply selecting it from the list and click the **Associate** button. This and other association will remain throughout the lifetime of the current call.

Cases and Opportunities can be created quickly and are automatically associated to the current call. Scheduled follow-up Phone Call activities can also be created at the click of a button, automatically including details and associations of the current call.

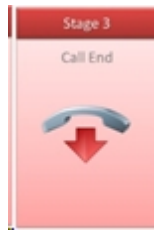
Re-Association

The re-associate feature allows users to change the Lead, Contact or Account against which the phone call is logged. This means that a wrongly associated entities can be immediately fixed without any disruption to the conversation.



Dynamics Call Assistant

Stage 3 – Call Ending



Once the call has ended, you enter the final stage of the call lifecycle. At this point you are likely to have acquired information during the call that must be distilled and have follow-up actions to schedule.

Call Wrap-up

The intelli-CTi **Telephone Call Wrap-up** dialog allows you to complete any outstanding notes about the call, as well as perform various actions on associated caller data.

The screenshot shows the 'Telephone Call Wrapup' dialog box. At the top, it displays 'Call Direction (Result): Outbound (Established)' and 'Call Started (Duration): 21 Jun 09:49 (00:06:47)'. Below this is a section for 'PHONE CALL ACTIVITY' with a telephone icon. It includes an 'Association' field with the value 'Daniel Thompson, Bike Boutique' and a 'Subject' field with 'Call To: Daniel Thompson'. A text area contains the note: 'Called out to Daniel to arrange more time to investigate a faulty bike that Daniel received.' Below the text area is a 'Call Disposition' dropdown menu set to 'Qualified'. There is a checked checkbox for 'Auto-complete existing activity' and two buttons: 'Create Follow-up' and 'Open Phone Call'. The bottom section shows a 'CASE (CAS-01002-N3L2Q9)' with the title 'Defective Bike - Cracked Frame'. It lists 'Priority: Normal', 'Created on: 21 Jun', and 'Status: Active'. There is a link 'Remove Call Relationship' and three buttons: 'Resolve Case', 'Cancel Case', and 'Open Case'. An 'OK' button is at the bottom right.

Telephone Call Wrap-up

Depending on the associations made to the call, the Telephone Call Wrap-up form allows you to perform the following actions:

**Open Phone Call**

The related Phone Call Activity will be updated to reflect notes/subject and the record will be automatically completed (if ticked to do so) before being opened in Microsoft Dynamics CRM. This option is useful if you wish to make further changes to the Phone Call Activity record, such as re-assigning the Activity to another record.

(Note: When clicking “Open Phone Call” the call activity will not be auto-completed even if the auto-complete existing activity is selected)

**Create Follow-up (Phone Call)**

A new Phone Call activity will be created, with the details (subject, notes, associations) from the current call copied across. You can then set the Due Date for the follow-up call and any other details.

**Resolve/Cancel Case**

If there is an “open” Case associated with the call, you can resolve or cancel it directly from the wrap-up screen. You can choose the reasons for either action, just as you can in the CRM client.

**Open Case**

The related Case will be opened in Microsoft Dynamics CRM, where you can make changes as necessary.

**Open Opportunity**

The related Opportunity will be opened in Microsoft Dynamics CRM, where you can make changes as necessary.

intelli-CTi CRM Relationship Management

By the very nature of CRM, the importance of relationship management is at the heart of your customer interactions. Microsoft Dynamics CRM provides many key aspects and features in support of customer interaction, with the key being to harness these aspects through relationships to leverage the true power and success of good Customer Relationship Management.

During the lifecycle of a telephone call and our use of Microsoft Dynamics CRM, we can touch on many of these CRM aspects during telephone interaction with our customers.

A telephone call can often relate to many entities within your CRM solution, such as CRM Accounts, Contacts and/or Leads; together with possible relationships to CRM Activities, History, Opportunities and/or Cases. Through customisation we may also factor in relationships to other custom CRM entities.



intelli-CTi CRM Relationship Management

intelli-CTi for Microsoft Dynamics CRM provides extensive support to manage these varied and complex CRM relationships across the multitude of CRM entities that may relate to telephone call activity. Ensuring that each CRM entity related to a telephone call, and their relationships to each other are duly linked and recorded within the CRM system.

Thus providing a complete and historic account within CRM of all telephone activity relating to the various CRM entities.

Importance of Relationships

If not always essential, the importance of building such relationships within our CRM solution provides the business with rich detailed information about its customer interactions. Providing the ability for the CRM system to aid and assist in delivering good customer service through managed activity based processes. However without the depth and richness of information and relationships within the data, this can question the effectiveness of the CRM.

Managing CRM Relationships with Ease

An import aspect of the CRM relationship building process provided by intelli-CTi is the ease by which these complex relationships can be established and managed throughout the telephone call process. Associating a related CRM entity to a telephone call with intelli-CTi is very easy, and made easier so depending upon how the telephone call is handled.

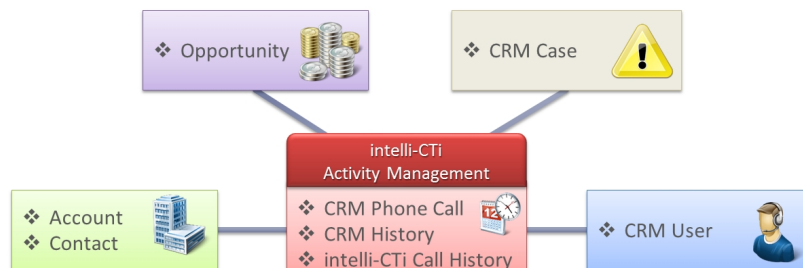
Telephone call handling examples:

- If a telephone call received was to instigate a new Case (support incident) then the new Case can be created directly from the intelli-CTi/Breeze bar as part of the telephone call process – this will automatically associate the new Case with the telephone call.
- If a telephone call is received regarding an existing Case, then once the call has been qualified (see *Automatic Caller Recognition* page 10), a list of existing Cases for that caller can be viewed and selected from the CRM Call Assistant (see page 14 for more information) upon the Breeze bar. Selecting an existing case from the CRM Call Assistant will automatically associate the selected Case with the telephone call.
- If you wish to call a CRM Contact relating to a Case, this can be achieved from many touch points within CRM. However if you happen to call the Contact from within the Case detail (or an Activity relating to the Case), this will automatically associate the related Case with the telephone call. This will also automatically present the related Case within the CRM Call Assistant (Call Associations section).

Note: The above examples also provide the same feature associations when working with CRM Opportunities.

intelli-CTi Call Tracking and Activity Management

The integration of intelli-CTi for Microsoft Dynamics CRM provides automatic tracking of each telephone call within the CRM system, in the form of CRM Activities (“Phone Calls”); CRM History (completed “Phone Calls”); and intelli-CTi call history. Each recorded item also links to the various CRM entities that may have been associated to the telephone call, providing a complete view of the telephony activity against all related CRM entities.



intelli-CTi Call Tracking and Activity Management

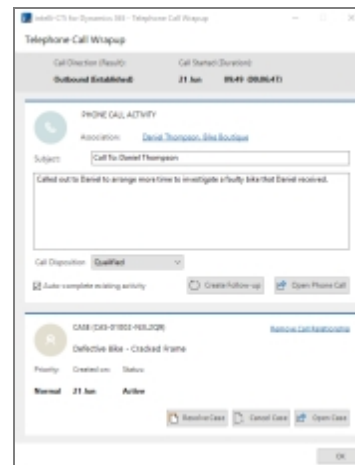
On reflection it is then possible to review all telephone activity from each of the related CRM entities and their relationships to associated CRM entities – thus providing the ability to show and track a complete historic view of telephony activity across multiple CRM entities.

Relationship Management Conclusion

Once a relationship to a CRM entity has been associated to the telephone call, its association lives throughout the life of the call and will also feature at the end of the call within the intelli-CTi Call Wrap-up process.

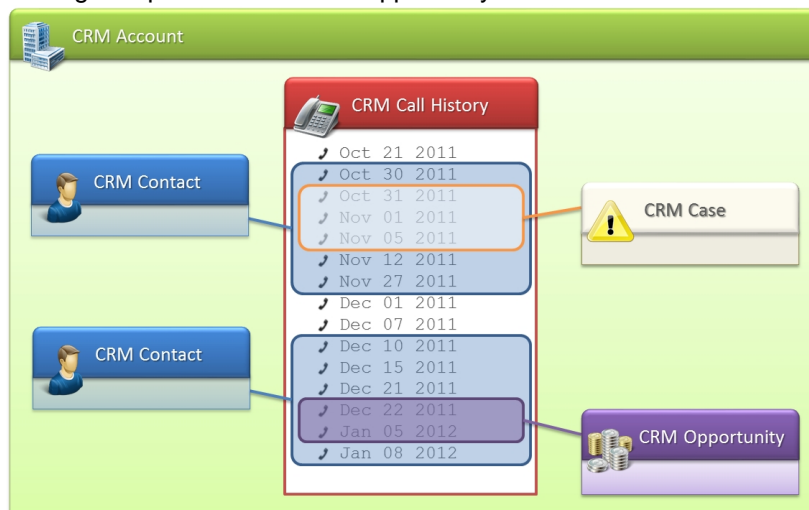
Proving the ability to further manage this relationship and take any concluding actions accordingly.

In the example of a CRM Case (support incident), providing the ability to resolve/close off the Case.



Analysis (Call Tracking, Auditing and Reporting)

As each telephone call activity is automatically recorded within the CRM system, together with all of its CRM entity relationships, this enables owners and users of the CRM system to analyse and review all telephone call activity relating to each and every CRM entity. This activity detailing rich information about each telephone call, together with the web of CRM relationships to this information. Providing a complete view of telephone calls to a CRM Account, or only those relating to a particular CRM Contact, or only those relating to a particular Case or Opportunity.



Analysis (Call Tracking, Auditing and Reporting)

Through the power of intelli-CTi for Microsoft Dynamics CRM's relationship management capabilities comes a richness of information within your CRM solution around the telephone interactions you have with your customers. Rich information by which to analyse, report and empower your business to provide great customer service and relationships with your customers...

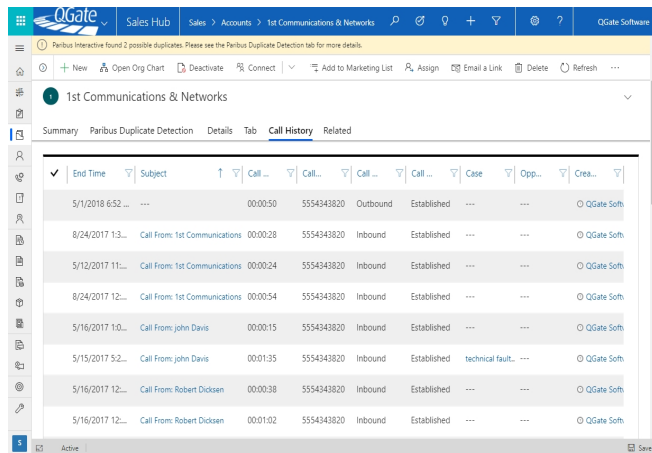
Call History

intelli-CTi for Microsoft Dynamics CRM keeps a record of telephone calls for Accounts, Contacts and Leads. You can find these records in the following locations:

Where to find Call History

Account History

On the Account view, select the **Related** tab item to view a list of the related entities, in the related list, select the **Call History** button. Telephone calls for this Account are listed within a Call History Association View.

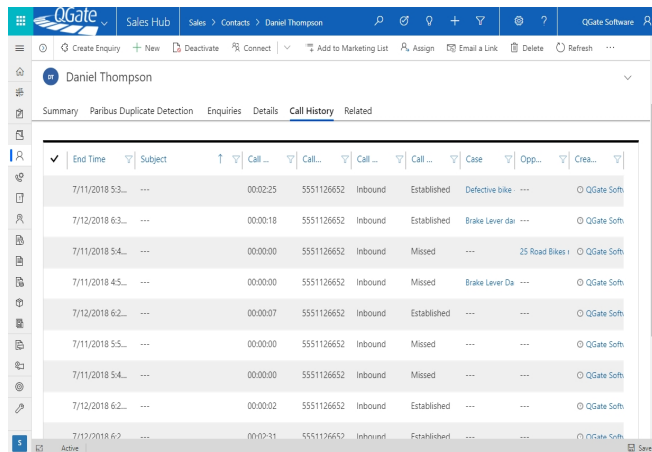


End Time	Subject	Call ...	Call ...	Call ...	Case	Opp...	Crea...
5/1/2018 6:52 ...		00:00:50	5554343820	Outbound	Established	---	O QGate Soft
8/24/2017 1:3...	Call From: 1st Communications	00:00:28	5554343820	Inbound	Established	---	O QGate Soft
5/12/2017 11:...	Call From: 1st Communications	00:00:24	5554343820	Inbound	Established	---	O QGate Soft
8/24/2017 12:...	Call From: 1st Communications	00:00:54	5554343820	Inbound	Established	---	O QGate Soft
5/16/2017 1:0...	Call From: John Davis	00:00:15	5554343820	Inbound	Established	---	O QGate Soft
5/15/2017 5:2...	Call From: John Davis	00:01:35	5554343820	Inbound	Established	technical fault...	O QGate Soft
5/16/2017 12:...	Call From: Robert Dickson	00:00:38	5554343820	Inbound	Established	---	O QGate Soft
5/16/2017 12:...	Call From: Robert Dickson	00:01:02	5554343820	Inbound	Established	---	O QGate Soft

intelli-CTi Call History for an Account

Contact History

On the Contact view, select the **Related** tab item to view a list of the related entities, in the related list, select the **Call History** button. Telephone calls for this Contact are listed within a Call History Association View.



End Time	Subject	Call ...	Call ...	Call ...	Case	Opp...	Crea...
7/11/2018 5:3...		00:02:25	5551126652	Inbound	Established	Defective bike...	O QGate Soft
7/12/2018 6:3...		00:00:18	5551126652	Inbound	Established	Brake Lever da...	O QGate Soft
7/11/2018 5:4...		00:00:00	5551126652	Inbound	Missed	---	25 Road Bikes... O QGate Soft
7/11/2018 4:5...		00:00:00	5551126652	Inbound	Missed	Brake Lever Da...	O QGate Soft
7/12/2018 6:2...		00:00:07	5551126652	Inbound	Established	---	O QGate Soft
7/11/2018 5:5...		00:00:00	5551126652	Inbound	Missed	---	O QGate Soft
7/11/2018 5:4...		00:00:00	5551126652	Inbound	Missed	---	O QGate Soft
7/12/2018 6:2...		00:00:02	5551126652	Inbound	Established	---	O QGate Soft
7/12/2018 6:3...		01:02:31	5551126652	Inbound	Established	---	O QGate Soft

intelli-CTi Call History for a Contact

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/

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.

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/