

Demonstration Install Getting Started Guide

Step-by-step for Microsoft Dynamics CRM 2011/2013/2015

- 1) Go to either of the QGate Web sites at www.qgatesoftware.com or www.qgate.co.uk and click the **Download Trial** button and complete the information to receive the proper download email from QGate.
- 2) **Download and Extract the kit** onto your computer. The kit is the actual product package with full documentation. The email will also contain 30-day trial licenses that you will **not** need for installing for demonstration purposes, but you can use for client or partner trials. The 30-day clock for client trials begins upon installation of the licenses.
- 3) **Install intelli-CTi customizations** – Using the CRM application, install and publish the appropriate Solution (.zip file) found in the ... \Application Support \Microsoft Dynamics CRM \CRM Server \CRM Customizations \ folder.
- 4) **Apply New Security Role: intelli-CTi User** – From the User area of CRM Administration, apply the **intelli-CTi User** Security Role to any users you wish to use for demonstration purposes.
- 5) **Migrate telephone numbers into intelli-TNS** – Run the **intelli-CTi Data Load Utility for Dynamics CRM.exe** application found in: ... \Application Support \Microsoft Dynamics CRM \CRM Server \intelli-TNS Loader for MSCRM \.
- 5a) Within the Data Load Utility program, create a connection to your CRM organization by clicking on the ellipsis (...) button, click Add, give the connection an Alias Name, set the Version to CRM 2011, 2013 or 2015, select the Deployment Type, CRM Server Name & Port Number (or the Region and Login type for CRM Online) and click the ellipsis button next to the Organization selector to enter your appropriate credentials to connect. Select the Organization and click OK. Close the Service Connection Manager.
- 5b) Select the Server Connection you just created and click on the Processing Options tab. Click Start. When the process is completed, click Close.
- 6) **Install the intelli-CTi Client Application** – Run the **intelli-CTi for Dynamics CRM - Client Setup.exe** application found in the ... \Setup \ folder. This will install QGate Breeze (the desktop framework that intelli-CTi runs within) and the intelli-CTi application. It will also install a phone switch simulator (VTS – Virtual Telephony Server) that will allow you to simulate inbound and outbound calls without being tied to a real phone system. During the installation, you will encounter a screen that asks if you wish to “Connect to a telephony device” or “Connect to the QGate Virtual Telephony Server (VTS)”. Select VTS and click Next. It will then present you with the Telephony Devices dialog. Click Add, select the VTS, click OK on the Configuration message and click Close to continue the installation through completion.
- 7) **Configuring the Client** – Once the installation is completed, go to Start | All Programs | QGate Breeze | QGate Breeze Settings. Select the QGate Microsoft Dynamics CRM Integration (XRM) Service from the list and click the Configure... button. Select the client integration you would like to use. You will also need to create a new server connection just as you did in step 5a above. Select this new Microsoft Dynamics CRM server connection from the pull-down, enter your credentials and click Save and OK to save all the settings.
- 8) **Demonstration** – Please refer to the **intelli-CTi for Microsoft Dynamics CRM - User Guide.pdf** found in the ... \Documents \Microsoft Dynamics CRM folder for operation of intelli-CTi and/or view the YouTube videos on the QGate Software YouTube channel. If you have additional questions, please don't hesitate to contact your QGate representative. Additional product information, phone switch compatibility and contact information for the relevant offices can be found on the QGate Web sites listed in Step 1 above.

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Please note that this document's sole purpose is to provide a very abbreviated outline to install intelli-CTi for Dynamics CRM into a CRM 2011, 2013 or 2015 instance for demonstration purposes only. For full instructions on the installation and configuration for a test or production install with an actual phone system, please refer to the full documentation included in the installation kit.

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