



# intelli-CTi™ for Microsoft Dynamics CRM

I would recommend QGate and intelli-CTi to anyone looking for an easy, flexible CTI solution that can work with the telephone system you have in place. We found that it allowed us to do specific things for Metro Bank to speed up the pop-up of calls. On average it can reduce the call pop-up or the average hunting time by 15%.

- Marco Amoedo, Senior Solutions Architect, Metro Bank

“We decided to work with QGate because of the level of service we could get from them. Their response, the emails when we were trialing and their willingness to help were just a different level to other vendors.”

- Marco Amoedo, Metro Bank

## BENEFITS:

- > Streamlined telephony activity within your business
- > Improved customer relationships, service levels and customer satisfaction
- > Increased telephone call efficiency and throughput
- > Personalized telephone interaction -- identifying CRM callers automatically
- > Seamlessly leverage the power of CRM relationships with minimal effort
- > Increased business productivity and ease of use
- > Reduced development costs with ease of deployment and implementation
- > Flexible deployment capabilities across multiple sites and large-scale implementations

## CONNECT MICROSOFT DYNAMICS CRM WITH YOUR TELEPHONE SYSTEM - NOW COMPATIBLE WITH DYNAMICS 365

**Are you still manually dialing telephone numbers, looking up Contacts and capturing telephone call information by hand?**

intelli-CTi for Microsoft Dynamics CRM instantly improves the effectiveness of your customer interaction and the productivity of your CRM users. intelli-CTi enables dialing of CRM Contacts directly from within Microsoft Dynamics CRM with just a single click and automatically identifies incoming calls showing CRM contact information before you even answer the telephone.

intelli-CTi provides the ability to manage the entire call flow process while freely interacting with Microsoft Dynamics CRM. intelli-CTi provides assistance throughout the telephone lifecycle with easy interaction with CRM (with the aid of our new Dynamics Call Assistant), note capture capability, concluding with a complete post-call wrap-up.

**intelli-CTi for Microsoft Dynamics CRM enhances profitability through increased productivity and customer satisfaction.**

Whether building solutions for sales, call centers, support desks or customer service, intelli-CTi, together with Microsoft Dynamics CRM, will increase the productivity and efficiency of your operation while enhancing customer satisfaction and bottom-line profitability.



# intelli-CTi™ for Microsoft Dynamics CRM

## KEY FEATURES:

- > Seamless integration into Microsoft Dynamics CRM / Dynamics 365
- > Telephone system independent across multiple sites, including Microsoft Lync
- > Incoming caller recognition (screen-pop) displaying customer information from Microsoft Dynamics CRM
- > Outbound dialing support to any CRM-related entity (click-to-dial)
- > Recording of all call history within Microsoft Dynamics CRM
- > In-call note capture capability
- > Citrix/Terminal Server support

## INCREASE PRODUCTIVITY AND CUSTOMER SATISFACTION TO ENHANCE PROFITABILITY

**intelli-CTi for Microsoft Dynamics CRM significantly enhances your investment in CRM by connecting you even closer to your customers**

### Flexible implementation

Customize the intelli-CTi integration with Microsoft Dynamics CRM to meet your business needs.

Connect seamlessly to your CTI-enabled telephone systems through intelli-CTi's support for standard telephony interfaces (TAPI, TSAPI, CSTA, MiTAI, OAI), including Voice Over IP (VOIP) and Microsoft Lync.

### Streamlined telephony activity

Use the Dynamics CRM Call Assistant to provide the call flow process with rich detailed CRM information.

Manage post call operations in CRM such as note taking, Activity management, Case management and/or Opportunity management.

### Quality call data collection

Manage complex CRM entity relationships to ensure the capture of quality data across multiple related CRM entities.

Automatically log telephone call statistics with associated customer data to enable valuable analysis and business intelligence.

### Improved productivity and customer service

Instantly retrieve CRM Account and Contact information in Microsoft Dynamics CRM when a telephone call is received.

Improve the speed and accuracy of outbound calling with one-click dialing of Microsoft Dynamics CRM Accounts, Contacts and Leads.

The screenshot displays the Microsoft Dynamics CRM interface with the intelli-CTi overlay. The contact record for Daniel Thompson is visible, including his name, job title (Office Manager), and company (Bike Boutique). The call log shows a call received from Daniel Thompson on 10/21/10, with a note: "Received a call from Daniel to say that the brake lever on the new bike we shipped him was damaged on arrival. I have offered to ship him a replacement lever immediately for which he was happy." The interface also shows the Dynamics CRM Call Assistant and Telephone Call Manager components.

**CRM Contact Information**  
Show the CRM Contact information of the caller in your Microsoft Dynamics CRM

**Telephone Call Manager**  
Telephone call control providing the ability to manage the telephone call and capture notes during the call.

**Dynamics CRM Call Assistant**  
In-Call assistant providing ready access to call related aspects of Dynamics CRM. Manage and associate CRM entities to the call.

**Microsoft Partner**  
Silver Customer Relationship Management  
Silver Cloud Customer Relationship Management



QGate Software Limited  
2843 E Grand River Ave #212  
East Lansing MI 48823  
United States of America

T: +1 (517) 853-1214  
E: info@QGateSoftware.com  
W: www.QGateSoftware.com