



intelli-CTi™ for Microsoft Dynamics CRM

Microsoft Unified Service Desk (USD) Compatible

*QGate provides Microsoft's Unified Service Desk support with
intelli-CTi™ for Microsoft Dynamics CRM. V1.5*

As part of the Leo Spring 2014 release, Microsoft has focused on the area of customer service. Microsoft has made available a new module called the Unified Service Desk (USD) and aimed it at the larger call center, customer service operations.

Feature Highlights

- CRM inbound call recognition and telephone call manager
- Telephone call manager and intelli-CTi screen pop inside USD
- Contact dialing from within CRM via the Dynamics CRM Dialer

Where did USD come from?

Unified Service Desk is built using the User Interface Integration framework and was designed as a series of adapters and modules that facilitate management of CRM UI elements (pages, dialogs), automatic loading of related records, agent scripting, a configurable toolbar and more. USD can be configured and administered using Microsoft Dynamics CRM or Microsoft Dynamics CRM for Outlook.

USD is a supported platform that Microsoft is developing and supporting in the US and India.

Further information on the Unified Service Desk can be found on the [QGate Blog](#).



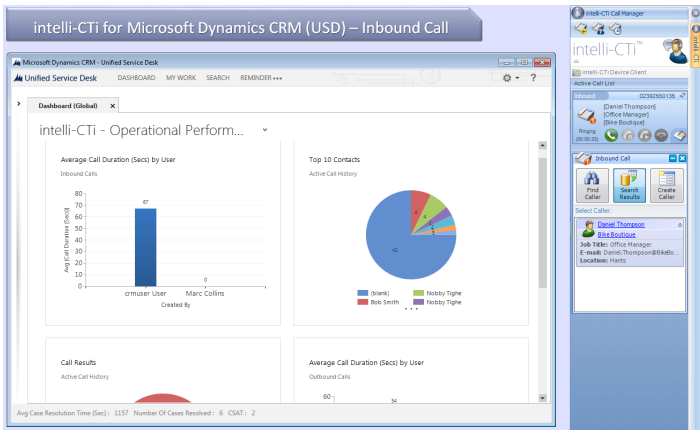
Why would you need USD?



- You have a call center operation and you need to provide your agents with one screen giving them access to all the key information they need to manage their calls
- Your agents need to manage multiple calls or sessions
- Your primary system is CRM, but you need to surface various CRM elements at once
- You need to provide access to data from other systems without switching applications
- You need to run some form of script to prompt or guide agents through a call

intelli-CTi and USD

Using intelli-CTi with USD means your organization will be able to use a single technology for both the USD users and those CRM users that need a "standard" CTI capability. To see this in action, watch our [video on intelli-CTi and USD](#).



intelli-CTi and USD: Inbound Calls

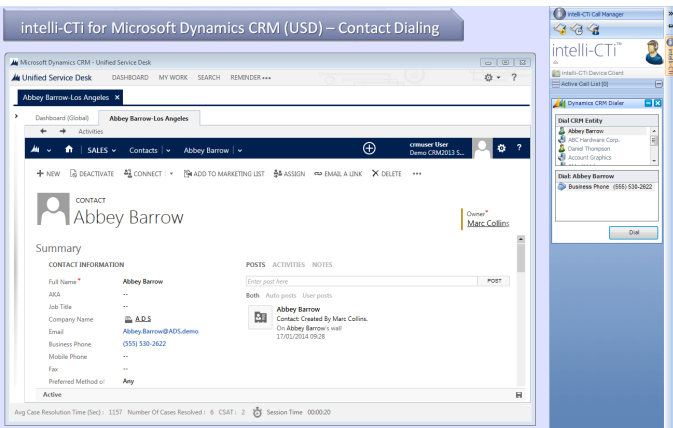
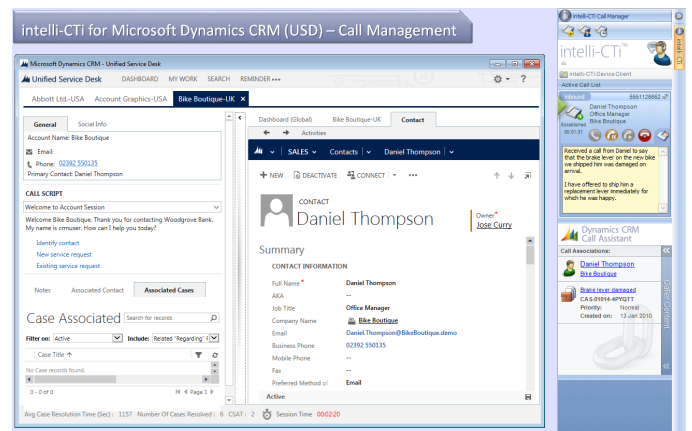
intelli-CTi's telephone call control provides the ability to answer incoming calls while Microsoft Dynamics CRM runs within the Microsoft Unified Service Desk.

intelli-CTi automatically recognizes inbound callers in your Microsoft Dynamics CRM system. Clicking the links provided by intelli-CTi will present the caller's details in Dynamics CRM (hosted by USD).

intelli-CTi and USD: Call Management

The Microsoft Unified Service Desk application can be driven by intelli-CTi. intelli-CTi telephone call control runs seamlessly alongside USD, providing the ability to manage a telephone call and capture notes during the call.

Upon clicking the link provided by intelli-CTi the caller's details will appear within CRM/USD.



intelli-CTi and USD: Contact Dialing

Selecting or displaying a CRM Entity (e.g. Contact) within Dynamics CRM/USD provides the ability to dial that CRM entity using intelli-CTi.

The Dynamics CRM Dialer provides a list of CRM entities based on the context of what is currently displayed within Dynamics CRM/USD. Users can select the CRM entity they wish to call as well as the telephone number they wish to dial from within this list.



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Content subject to change

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