



*intelli-CTi*TM

for Infor CRM

Product Tour (Web)



Telephone Call Scenario: Receiving an Inbound Call



Contact - Abbott, John

Lookup Results Active Campaigns **All Contacts** Authorized Contacts Do Not Solicit Duplicate Emails Latest Contacts Missing En

1 of 1094

Name: John Abbott

Work: (312) 555-7854

Account: Abbott Ltd.

Title: President

Asst: Ms. Jane Smith

Dear:

Address: 4206 W. Gr... Suite 900 Chicago, IL 60655 USA

Preferred Contact: Phone

E-mail: jabbot@abt

Web URL: www.abbott

Owner: Midwest

Acct. Mgr: Hogan, Lee

Cont. Type: Decision Mak

Cont. Status: Active

Primary Contact for Acct.

Authorized Service Contact

Do not Solicit

Do not Email

Do not Call

Do not Mail

Do not Fax

CRM Contact Information

Show the CRM Contact information of the caller in your Infor CRM

Telephone Call Manager

Telephone call control providing the ability to answer the incoming call

CRM Inbound Caller Recognition

The automatic recognition of inbound callers in your Infor CRM system

- SALES
 - Welcome
 - Accounts
 - Contacts
 - Leads
 - Opportunities
 - Sales Orders
 - Activities
 - Calendar
 - What's New
 - Library
 - Reports
 - Processes
 - intelli-CTi
 - Products
 - Packages
- MARKETING
- SERVICE
- SUPPORT
- ADMINISTRATION
- INTEGRATION

Call History

intelli-CTi™ for Infor CRM	

intelli-CTi Call Manager

Virtual Telephony Server (VTS) (VTS1)

Active Call List [1]

Inbound 3125551234

[John Abbott]
[Abbott Ltd.]

Ringing (00:00:11)

Inbound Call

Infor CRM Caller Recognition

3125551234

Related Contact(s)

[John Abbott](#)
[Abbott Ltd.](#)

Job Title: President
E-mail: jabbot@abbott.demo
Department: Administration
Location: Chicago, IL

Add Response to...
Add Note
New Meeting
New Phone Call
New To-Do
Import

Contact Tasks

Associate with User

Telephone Call Scenario: Preview Dialing from CRM (Entity Detail)



Contact - Abbott, John

Name: John Abbott Work: (312) 555-7854 Primary Contact for Acct.

Account: Abbott Ltd. Authorized Service Contact

Title: President

Asst: Ms. Jane Smith

Dear:

Address: 4206 W. Gr... Suite 900 Chicago, IL 6065 USA

Owner: Midwest Cont. Type: Decision Mak

Acct. Mgr: Hogan, Lee Cont. Status: Active

Do not Solicit

Do not Email

Do not Call

Do not Mail

Do not Fax

CRM Contact Entity Dialing

Displaying a CRM entity (e.g. CRM Contact) within Infor CRM will place the displayed entity into the Infor CRM Dialer, whereby this entity can then be dialed.

Infor CRM Dialer

The Infor CRM Dialer provides a list of CRM entities based upon the context of what is currently selected/active in Infor CRM.

Select the CRM entity you wish to dial along with the telephone number to be dialed.

intelli-CTi Call Manager

intelli-CTi

Virtual Telephony Server (VTS) (VTS1)

Active Call List [0]

Dial Infor CRM Entity

Dial Infor CRM Entity

- John Abbott
- Douglas Adi
- Joaquin Alamo
- Mark Alexander

Dial: John Abbott

- Direct (312) 555-7854
- Mobile (312) 555-1234
- Home (312) 555-3543

Dial

Detail Report
E-mail
Mail Merge
Add Response to...
Add Note
New Meeting
New Phone Call
New To-Do
Import

Contact Tasks

Associate with User

Telephone Call Scenario: Preview Dialing from CRM (List Dialing)



Infor CRM Recently Viewed New Schedule Tools Administration

SpeedSearch

intelli-CTi™

Contacts

Lookup Results Active Campaigns **All Contacts** Authorized Contacts Do Not Solicit Duplicate Emails Latest Contacts Missing

Displaying 1 - 10 of 1094

Name	Account	City	State	Work Phone	Mobile	Email	Acct. Manager	Owner
Abbott, John	Abbott Ltd.	Chicago	IL	(312) 555-7854	(312) 555-1234	jabbot@abbott.demo	Lee Hogan	M...
Abbott, Keith	Full Systems	Elkton	MD	(410) 555-7250 x226	(410) 555-3571	Keith@FullSystems.demo	Dan Barret	M...
Aberle, K	Gates Machine	Miami	FL	(305) 555-0057	(305) 555-1926	K@GatesMachine.demo	Linda Walsh	S...
Acefi, Janet	Sama Propety	Hilton Head	SC	(803) 555-3842	(803) 555-9153	Janet@SamaPropety.demo	Linda Walsh	S...
	Summit & Co.	San Diego	CA	(619) 555-4728	(619) 555-9506	Juan@Summit&Co.demo	Ed Martinez	S...
Dave	Crystal Industries Communications	Savage	MD	(800) 555-4914 x6246	(800) 555-6151	Dave@CrystalIndustriesCommunications.demo	Dan Barret	Northeast
Georgia	Coca-Cola Amatil (NZ) Ltd	Auckland		(9) 4503000			Georgine Ekels	Global
Joe	Clearview Corporation Inc.	Pompano Beach	FL	(954) 555-1010	(954) 555-3205	Joe@ClearviewCorporationInc.demo	Linda Walsh	Southeast
Ralph	SOLD Out Co.	Alexandria	VA	(703) 555-1203	(703) 555-2625	Ralph@SOLDOutCo.demo	Linda Walsh	Southeast

Infor CRM Dialer

The Infor CRM Dialer provides a list of CRM entities based upon the context of what is currently selected/active in Infor CRM.

Select the CRM entity you wish to dial along with the telephone number to be dialed.

CRM Contact List Dialing

Selecting a CRM entity (e.g. CRM Contact) from a list within Infor CRM will place the selected entity into the Infor CRM Dialer, whereby this entity can then be dialed.

Virtual Telephony Server (VTS) (VTS1)

Active Call List [0]

Dial Infor CRM Entity

Dial Infor CRM Entity

- John Abbott
- Douglas Adi
- Joaquin Alamo
- Mark Alexander

Dial: John Abbott

- Direct (312) 555-7854
- Mobile (312) 555-1234
- Home (312) 555-3543

Dial

Telephone Call Scenario: Preview Dialing from Related CRM Entities



Infor CRM Recently Viewed New Schedule Tools Administration



SpeedSearch



intelli-CTi™



Ticket - 001-00-000004

Groups

Lookup Results All Open Follow-Up My Tickets Overdue Punched In Unassigned Web Portal All Tickets Web Portal Closed

SALES

Welcome

Accounts

Contacts

Leads

Opportunities

Sales Orders

Activities

Calendar

What's New

Library

Reports

Processes

intelli-CTi

Products

Packages

MARKETING

SERVICE

SUPPORT

ADMINISTRATION

INTEGRATION

Account Name:

Contact Name:

Phone:

E-mail:

Contract:

Area:

Category:

Issue:

CRM Entity Related Dialing

It is possible to make telephone calls from related CRM entities such as CRM Tickets and CRM Opportunities, by calling from the entity's respective detail display within Infor CRM.

The CRM Account/Contact relating to the entity will appear in the Infor CRM Dialer, ready to be dialed.

This approach applies to both CRM Tickets and CRM Opportunities.

CRM Entity Related Dialing

It is possible to make telephone calls from related CRM entities such as CRM Tickets and CRM Opportunities, by calling from the entity's respective detail display within Infor CRM.

The CRM Account/Contact relating to the entity will appear in the Infor CRM Dialer, ready to be dialed.

This approach applies to both CRM Tickets and CRM Opportunities.

intelli-CTi Call Manager

Virtual Telephony Server (VTS) (VTS1)

Active Call List [0]

Dial Infor CRM Entity

Dial Infor CRM Entity

- John Abbott
- Douglas Adi
- Joaquin Alamo
- Mark Alexander

Dial: John Abbott

- Direct (312) 555-7854
- Mobile (312) 555-1234
- Home (312) 555-3543

Dial

Telephone Call Scenario: In-call Contact Management



Infor CRM Recently Viewed New Schedule Tools Administration

SpeedSearch

Contact - Abbott, John

Lookup Results Active Campaigns **All Contacts** Authorized Contacts Do Not Solicit Duplicate

- SALES
 - Welcome
 - Accounts
 - Contacts
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- MARKETING
- SERVICE
- SUPPORT
- ADMINISTRATION
- INTEGRATION

Name: John Abbott

Account: Abbott Ltd.

Title: President

Asst: Ms. Jane Smith

Dear:

Address: 4206 W. Gr... Suite 900 Chicago, IL 6065 USA

Home: (312) 333-3343

Other:

Preferred Contact: Phone

E-mail: jabbot@abt

Web URL: www.abbott

Owner: Midwest

Acct. Mgr: Hogan, Lee

Cont. Type: Decision Mak

Cont. Status: Active

CRM Contact Information

Show the CRM Contact information of the caller in your Infor CRM

Telephone Call Manager

Telephone call control and in-call note capture capability

intelli-CTi

Virtual Telephony Server (VTS) (VTS1)

Active Call List [1]

Inbound 3125551234

John Abbott
President
Abbott Ltd.

Established 00:01:30

Received a call from John to say that the handheld device we shipped him was damaged on arrival.

I have offered to ship a replacement immediately for which he was happy.

- Aberle, K
- Aceti, Janet
- Adamo, Juan
- Adams, Dave
- Adams, Georgia

Common Tasks

- Detail Report
- E-mail
- Mail Merge
- Add Response to...
- Add Note
- New Meeting
- New Phone Call
- New To-Do
- Import

Contact Tasks

- Associate with User

Call History intelli-CTi for Infor CRM

Telephone Call Scenario: Post Call Wrap-up

Infor CRM Call Wrap-up

Post each telephone call the Call Wrap-up dialog provides a summary of the call and the ability to further update and manage the telephone call within Infor CRM.

intelli-CTi™ for Infor CRM

Telephone Call Wrapup - Manage post telephone call actions and activities

Call Related Information

Call Direction (Result): **Inbound (Established)**
Call Started (Duration): **07/07/2015 11:02 (00:01:30)**

Call Association(s):
 [John Abbott, President](#)

Related Call Activity/History
Description/Regarding: **Inbound (Established)**

Received a call from John to say that the handheld device we shipped him was damaged on arrival.
I have offered to ship a replacement immediately for which he was happy.

Auto-complete activity

intelli-CTi™ Open in Infor CRM Save and Close

Telephone Call Manager

Showing a summary of the telephone call that has now ended.

CRM Activity Management

Each telephone call is automatically related to CRM Activity/History (Phone Call).

Notes taken during the call are featured here and can be updated, before automatically included within the CRM Activity/History.

intelli-CTi™

Virtual Telephony Server (VTS) (VTS1)

Active Call List [1]

Inbound 3125551234

John Abbott
President
Abbott Ltd.

Call Time: 17:26 - 17:31 (00:04:56)

Received a call from John to say that the handheld device we shipped him was damaged on arrival.
I have offered to ship a replacement immediately for which he was happy.



Contact - Abbott, John

Groups +

Lookup Results Active Campaigns All Contacts Authorized Contacts Do Not Solicit Duplicate Emails Latest Contacts Missing Er

drag a tab here to show it in this area

Details Opportunities Notes/History Activities Tickets Processes Associations Addresses

More Tabs

Print Email Attachments Add Checkmark ?

Records 1 - 11 of 18

Type	Date/Time	User	Opportunity	Regarding
Phone Call	7/7/2015, 11:36 AM	Administrator		Inbound Call (Established)
Phone Call	7/1/2015, 5:31 PM	Administrator,		Inbound (Established)
Phone Call	7/1/2015, 5:17 PM	Administrator,		Inbound (Established)
Phone Call	7/1/2015, 3:47 PM	Administrator,		Outbound (Established)
Phone Call	6/23/2015, 5:01 PM	Administrator,		Inbound (Established)
Phone Call	6/18/2015, 3:11 PM	Hogan, Lee		Outbound Call (Established)
Phone Call	6/18/2015, 3:09 PM	Hogan, Lee		Inbound Call (Established)
Phone Call	6/12/2015, 11:05 AM	Hogan, Lee		Inbound (Established)
Phone Call	4/20/2007, 8:41 PM	Hutchinson, Barb	Abbott Ltd.-Phase3	Info Requested
E-mail	4/12/2007, 12:00 AM	Hogan, Lee		Call Tickets for Abbott L
Meeting	4/11/2007, 7:00 PM	Hogan, Lee	Abbott Ltd.-Phase I	Status Meeting

Received a call from John to say that the handheld device we shipped him was damaged on arrival.

I have offered to ship a replacement immediately for which he was happy.

- Group List
- Abbott, John

Contact Tasks
Associate with User

Phone Call List

Here shows a complete list of telephone calls made and received to a CRM entity (Contact). This activity list is automatically achieved through the call management of intelli-CTi.

CRM Activity Management

Each telephone call achieved using intelli-CTi is automatically recorded in the Infor CRM Activity/History, against each of the CRM entities the telephone call relates to (e.g. CRM User, Account, Contact, Lead, Opportunity, Ticket etc.).

intelli-CTi – Infor CRM Call Activity Management

Info CRM Recently Viewed New Schedule Tools Administration

SpeedSearch

Phone Call - Outbound Call (Established)

Regarding: Outbound Call (Established)

Location:

Completed: 7/7/2015, 12:18 PM Scheduled: 7/7/2015, 11:50 AM

Timeless Duration: 28 minutes (12:18 PM)

General Attachments All Participants

Result:

Contact Lead

Name: Abbott, John Opportunity:

Account: Abbott Ltd. Ticket: 001-00-000004

Category: Leader: Administrator

Priority: None

Notes: Received a call from John to say that the handheld device we shipped him was damaged on arrival.
I have offered to ship a replacement immediately for which he was happy.

Follow-up: None

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CRM Phone Call Activity

Each telephone call achieved using intelli-CTi is automatically recorded in the Infor CRM Activity/History, against each of the CRM entities the telephone call relates to (e.g. CRM User, Account, Contact, Lead, Opportunity, Ticket etc.).

CRM Phone Call Activity Detail

The details automatically captured within the CRM Phone Call Activity includes information about the call, any notes captured during the call, and any CRM entity relationships associated to the call (e.g. Regarding a Ticket).

intelli-CTi for Infor CRM – CTi Call History



Infor CRM Recently Viewed New Schedule Tools Administration

SpeedSearch

Contact - Abbott, John

Groups +

Lookup Results Active Campaigns **All Contacts** Authorized Contacts Do Not Solicit Duplicate Emails Latest Contacts Missing En

Title: Mobile:
 Asst: Home: Do not Solicit
 Dear: Other: Do not Email
 Address: Preferred Contact: Do not Call
 E-mail: Do not Mail
 Web URL: Do not Fax

Owner: Cont. Type:
 Acct. Mgr: Cont. Status:

- Group List
- Abbott, John
 - Abbott, Keith
 - Aberle, K
 - Aceti, Janet
 - Adamo, Juan
 - Adams, Dave
 - Adams, Georgia
- Common Tasks
- [Detail Report](#)

Call History

intelli-CTi™ for Infor CRM

Call Start Time	Call Duration	Direction	Call Result	User	Activity	Follow-Up	Opportunity	Campaign	Lead Source	Call
7/7/2015	00:27:40	Outbound	Established	Administrator						9001
7/7/2015	00:01:12	Inbound	Established	Administrator						3125
7/1/2015	00:04:56	Inbound	Established	Administrator						3125

Call History (for Contact)

A complete list of intelli-CTi Call History for a CRM Contact.

intelli-CTi "Call History"

For each CRM entity that relates to telephone activity (e.g. CRM Accounts, Contacts, Leads, Tickets, Opportunities), intelli-CTi provides a detailed log of each telephone call interaction.

intelli-CTi[™] for Infor CRM

