

# intelli-CTi<sup>™</sup> for Infor CRM

Version 3.5

# Infor CRM LAN Client User/Administrator Guide

Document Version 1.4



QGate Software Limited D2 Fareham Heights, Standard Way, Fareham Hampshire, PO16 8XT United Kingdom

Tel +44 (0)1329 222800

info@QGate.co.uk www.QGate.co.uk

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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 Infor CRM. This includes:

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

It also provides all the information you need to configure intelli-CTi for Infor CRM, including:

- Setting up intelli-CTi users.
- Configuring Call Notification and Call Wrapup.
- Configuring telephone numbers.
- Creating DDI Profiles.

# Who Should Read this Document

The first part of this document is intended for users of intelli-CTi for Infor CRM (See page 10).

The second part of this document is intended for Infor CRM administrators who are responsible for configuring intelli-CTi for Infor CRM (See page 55).

# 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 Infor CRM (LAN and Web client), see the *intelli-CTi – Infor CRM Getting Started Guide* 

For information on using and administering intelli-CTi for Infor CRM Web client, see the *intelli-CTi* – *Infor CRM Web Client User/Administrator 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 Sage Installation Package).

For additional reference information on intelli-CTi, see the QGate KnowledgeBase at <u>www.QGate.co.uk/knowledge/intelli-cti/</u>.

For up to date information on intelli-CTi and other QGate products, please visit the QGate Software website at <u>www.QGate.co.uk</u>.

# About intelli-CTi

intelli-CTi is a computer telephony application which provides a desktop interface to your telephone system, and seamless integration into many of your front office applications such as Infor CRM and legacy applications.

Standalone, intelli-CTi provides the means of receiving and answering telephone calls, provides information on who is calling, and the ability to manage the call throughout its duration. In addition you can also dial out using intelli-CTi's various dialing facilities.

intelli-CTi also provides call logging of your most recent calls, categorised by inbound/outbound and missed calls.

When combined with application integration to front office applications, such as Infor CRM, intelli-CTi provides many telephony features to enhance the usability and performance of such applications. These features include:

- Preview-Dialing directly from Infor CRM.
- Automatically identifying and displaying Accounts and Contacts during incoming calls (screenpop).
- Automate dialing processes (list based dialing)\*.
- Automate the dialing and management of activities\*.
- Call Activity Management\*.
- Automate the dialing of Accounts, Contacts, Leads, Opportunities (related Accounts/Contacts), Tickets (related Accounts/Contacts).
- Automatic tracking of the call-flow process.
- In-call notepad facility.
- Call management, Call Wrap-up and automation of follow-up activities and history management.
- Team call management console showing live user call activity\*.
- Call activity reporting\*.
- Automatically capture new Contact telephone numbers\*.
- DDI number recognition, linking inbound dialed telephone numbers to Infor CRM Processes, Lead Sources and Campaign Management\*.
- Automatic recording of call information within Infor CRM for audit tracking; performance analysis; and complete CRM history management.
- Enhanced Telephone Number Support (intelli-TNS).
- User configurable options and system administration.

(\* Not supported by the Infor CRM Web Client integration)

# **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, date, duration of the call and allowing the user to type full details of the conversation, arrange follow-up activities and associate the call with CRM Opportunities and Tickets.

#### **Responding to Campaigns**

Many businesses use DDI (Direct Dialing In) numbers on campaign adverts. Using intelli-CTi, any DDI number can be recognised and subsequently made to launch a campaign response from inside your CRM application, linking both the contact ID and the campaign code

# Integration, Customisation and Control

The intelli-CTi product provides a rich level of functionality whilst at the same time does not enforce any hard and fast business processes. Its seamless integration with database applications is based upon an open architecture approach, which provides an entry point into your application, upon which you can define your business processes.

These entry points are delivered to your application at appropriate points during telephony activity (i.e. during an incoming call). It is then required to develop the necessary functionality within your application, to deal with such events where appropriate. If no business processes are required, then no functional code is necessary.

The intelli-CTi product provides all the necessary call flow handling capabilities, such as call notification; call control (answer, hangup etc), alleviating the need to build heavy call handling logic deep within your application.

The intelli-CTi product also supports the connectivity to back-end telephone systems and CTI servers. Integration to your application is a seamless process, and as a result both intelli-CTi and your application may run independently and do not rely upon each other during implementation.

Most features and functions of the intelli-CTi product are customisable and/or optional.

# **Opening intelli-CTi**

# Starting intelli-CTi/Breeze

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

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

If you are using the Infor CRM LAN client, intelli-CTi can be set to start when Infor CRM starts (See **User/Team Profiles – General Tab** on page 59).

# 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.



Figure 1 – Breeze sidebar collapsed



Figure 2 – Breeze sidebar expanded

# intelli-CTi running within QGate Breeze



Figure 3 - 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 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.

# **Incoming Calls**

intelli-CTi for Infor CRM provides automatic call recognition of Accounts and Contacts during incoming calls by matching the CLI (Caller Line Identifier – the number the caller is calling from) with the telephone numbers stored within Infor CRM.

- If a match is established, intelli-CTi will automatically display the **Associate Telephone Call** dialog showing the Contact and/or Account in Infor CRM.
- If multiple Contacts are found to match (i.e. Account switch board number), the list will show each matching Contact.
- If the call relates to a known DDI profile, the name of the DDI profile as defined in Infor CRM is also displayed (See page 63 for more information about DDI Profiles).

The following guide will take you through multiple scenarios on how intelli-CTi will deal with an incoming phone call.

# **Scenario**

You receive an incoming telephone call.

# **Step by Step**

1. When an incoming call is detected by intelli-CTi, the intelli-CTi panel will expand from the side bar displaying information relating to the call.



2. If the originating phone number exists in Infor CRM, the **Associate Telephone Call** dialog is displayed.

If the incoming phone number does not exist in Infor CRM, the user can manually associate the number to a contact, account or lead. See Incoming Telephone Number Not Recognised on page 21.

ntelli-CTi - Associate				
intelli-(	Ti <sup>™</sup> for Infor CR <i>N</i>	I		
	all Association to associate this telephone c	all to a related entity in Info	r CRM?	
Select suggested call	related Account/Contact or se	earch for an alternative.		
Next Action: Sho	w Selected Entity	-	Select	Cancel
Related Account:	[Abbott Ltd.]	Department	City	•
John Abbott	President	Administration	Chicago	
Lou Balbo	VP of Sales	Sales	Chicago	
Dean Drew	VP of Cust Service	Customer Service	Chicago	-
Sydney Hamilton	Director of IT	MIS	Chicago	
Sophia Perez	Manager	Purchasing	Chicago	
Marina Rogers	Director of Marketing	Marketing	Chicago	-
All Contacts Fin	nd Con <u>t</u> act Find <u>A</u> ccount	Add <u>N</u> ew		
				swer Call
Inbound	Call: 18005551234		All	strer <u>e</u> un

3. In the example show above, intelli-CTi has detected that the originating call is associated with many contacts at this account (e.g. It is a switchboard number).

# **Associate Telephone Call options**

Next Action drop down menu options:

- Nothing When a contact is selected, take no action to locate the selected contact record.
- Show Selected Entity When a contact is selected, display the selected contact record.
- Show Call Manager When a contact is selected, show the Telephony Call Manager.

All Contacts – Show all contacts at the selected account.

**Find Contact...** – Opens the Infor CRM standard lookup screen enabling the user to search the database for the required Contact.

**Find Account...** – Opens the Infor CRM standard lookup screen enabling the user to search the database for the required Account.

Add New... - Opens the Infor CRM Add New Contact/Account dialog enabling the user to add a new Contact/Account.

Answer Call – Answer the incoming call.

You can also answer the call by picking up the telephone handset or selecting the intelli-CTi Answer button.

**Select** – Close the **Associate Telephone Call** dialog and go to the selected contact record (Or perform the action selected in the **Next Action** drop down box).

Cancel - Close the Associate Telephone Call dialog.

# **Answering the Call**

- 1. The call can be answered by picking up the telephone handset, clicking on the Associate Telephone Call **Answer** button or clicking on the intelli-CTi **Answer** button.
- 2. On selection of the caller's name from the Associate Telephone Call dialog, the Infor CRM contact record will be displayed.

					M - [Contact	: John Abbott]		inteli-CTI Call Manager
File Ec	lit View Ins	ert Schedule Lookup Write	Tools Window	Help				4343
Back Forward History Navigate	Save	Print Copy List/Detail Coportu Undo View	inity 🚜 Return 📑	Campaign	Hone Call Meeting	Complete	Add Cor Add Cor Mail Sport G & Import L Impo	Intelli-CTi 🛛 👔
Sales	Contacts 🔍	14 4	1 of 8	D B	я			Active Call List [1]
Sales Sales Sales Contacts		John Abbott           Abbott Lid.           President Lid.           President R           Ms. Jane Smith           4206 W. Grand Avenue           State 900           Orcage, IL 60651           USA           ett           Acct. Mgr.:           Hogan. Lee	Direct: Mobile: Fax: Home: Other E-mail: Web: Cont. Type:	(312) 555-78 (312) 555-12 (312) 555-15 (312) 555-35 (312) 555-35 (312) 555-35 (312) 555-35 (312) 555-35 (312) 555-35 (312) 555-35 (312) 555-35 (312) 555-12 (312) 555-15 (312)	34 5 45 5 43 5 bott.demo	Do Not Solicit	vice Contact	John Abbott President Abbott Ltd.
Leads					Drag a tab he	re to display a view	,	
						ties Processes /	Associations Summar	y
portunities	More Tabs		e Requests Attachm s E-mail	ents   Lead Sou	rces   Opportunit	Records show	n: 14	
2	1000 1000						n: 14	
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Activities	Filter Op Type Phone Call Phone Call Phone Call Phone Call	Patricio         Patricio           Date/Time         √         Leck / View Note:           0/18/2015         5:01: Administrator;         6/18/2015         6/18/2015           6/18/2015         3:09: Hogan, Lee         6/12/2015         1:05: Hogan, Lee	s E-mail Contact Name Abbott, John Abbott, John Abbott, John	Result	Refresh Description Inbound (Esta Outbound Call Inbound Call ( Inbound (Esta	Records shown ablished) II (Established) Established) ablished)		
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Activities Activities Intelli-CTi Calendary	Filter Op Type Phone Call Phone Call Phone Call Phone Call	Patricio         Patricio           Date/Time         √         Leck / View Note:           0/18/2015         5:01: Administrator;         6/18/2015         6/18/2015           6/18/2015         3:09: Hogan, Lee         6/12/2015         1:05: Hogan, Lee	s E-mail Contact Name Abbott, John Abbott, John Abbott, John	Result Complete	Refresh Description Inbound (Esta Outbound Call Inbound Call ( Inbound (Esta	Records shown ablished) II (Established) (Established) ablished) ed		
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Activities Activities intelli-CTi Calend	Filter Op Type Phone Call Phone Call Phone Call Phone Call Phone Call E-Mail	Lorenza Local Loca	s E-mail Contact Name Abbott, John Abbott, John Abbott, John Abbott, John Abbott, John	Result Complete Complete	Refresh     Description     Inbound (Esta     Outbound Call     Inbound Call     Inbound (Esta     Info Requeste     Call Tickets for	Records shown ablished) II (Established) (Established) ablished) ed or Abbott Ltd.		
Activities	Filter Op Type Phone Call Phone Call Phone Call Phone Call Phone Call Phone Call E-Mail Meeting	Josevine	s E-mail Contact Name Abbott, John Abbott, John Abbott, John Abbott, John Abbott, John Abbott, John	Result Complete Complete Complete Complete	Refresh     Description     Inbound (Esta     Outbound Call     Inbound (Esta     Inbound Call     Inbound (Esta     Info Requeste     Call Tickets fo     Status Meetin	Records shown ablished) II (Established) (Established) ablished) and an Abbott Ltd. 19		
Activities inteli-CTi Calend * Marketing	Filter Or Type Phone Call Phone Call Phone Call Phone Call E-Mail Meeting Phone Call	Josephilic         Josephilic           Date/Time         ℃         User Name           6/13/2015         5:01: Administrator,         6/13/2015           6/13/2015         5:01: Administrator,         6/13/2015           6/13/2015         5:01: Administrator,         6/13/2015           6/13/2015         5:01: Administrator,         6/13/2015           6/12/2015         1:01: Hogan, Lee         6/12/2020           4/12/2007         Hogan, Lee         4/11/2007           3/14/2007         Hogan, Lee         4/11/2007	s E-mail Contact Name Abbott, John Abbott, John Abbott, John Abbott, John Abbott, John Abbott, John Abbott, John	Result Complete Complete Complete Complete Complete Complete	Refresh     Description     Inbound (Esta     Outbound Call     Inbound (Esta     Inbound Call     Inbound (Esta     Info Requesta     Call Tickets fr     Status Meetin     Won the deal	Records shown Records shown (Established) (Established) (Established) ad bilshed) ad or Abbott Ltd.		

# Call Notepad

1. 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.



- 2. Type the detail of the conversation and additional notes while on the phone.
- 3. The Call Notes will be automatically moved to the call wrapup screen when the call has been disconnected.

# Call Hangup/Wrapup



- 1. When the call has finished, replace the telephone receiver or select the intelli-CTi **Hangup** button.
- 2. The Telephone Call Wrapup dialog will be automatically displayed.



3. The **Telephone Call Wrapup** dialog offers multiple options for the management of a completed phone call:

#### Call Info Tab

- 1. You can type a short description of the call into the **Call Description/Regarding** field. This is the equivalent of the **Regarding** field in an Infor CRM Notes/History item.
- 2. You can select a **Call Category** from the picklist or type one in. This will be copied into the category field of the Infor CRM Notes/History item.
- 3. You can select a **Call Result** from the picklist or type one in. This will be copied into the result field of the Infor CRM Notes/History item.
- 4. Any notes made in the Call Notepad will be automatically populated on the **Call Info** tab. Additional notes can be typed. These details will be stored in Infor CRM Notes/History for the selected contact.

# Activity Management Tab

intelli-CTi - Telephone Call Wrapup		<b></b>
intelli-CTi <sup>™</sup> for Infor CRM		
Telephone Call Wrapup Manage post telephone call actions and activites.	Complete	Minimize
Account: Abbott Ltd. Contact: John Abbott	Re-/	Associate
Call Info Activity Management Campaigns/Lead Sources Opportunities Ticket	s	
Call Related Activities Use this area to manage Infor CRM activities relating to this telephone call.		
Infor CRM Activity Management		
Manage Activities (6) Manage existing Activities for this Contact.	Manag <u>e</u>	
Schedule Follow-up Activity Schedule a follow-up Activity for this Contact. Phone Call O Meeting To-Do	Schedule	
Record History Record this call as Activity History for this Contact.	Create History	
Include Call Statistics Include Call Statistics within Infor CRM Activity and History Notes		

intelli-CTI – Infor CRM LAN User/Administrator Guide

1. The **Manage Activities** section on the **Activity Management** tab displays the number of existing activities associated with this contact.

#### Manage Activities (3)

2. Select the **Manage...** button to associate this call with an existing activity.

For example: If you had scheduled a call for tomorrow with a contact but the contact called unexpectedly today, you could associate this call with the scheduled call for tomorrow and complete the details.

intelli-CTi - Manage Ac	tivities			×
intelli-C	Ti <sup>™</sup> for Infor C	RM		- T
Call Related Ac	tivities Mactivities relating to t	his Account/Contact.		
John Abbott, Abbott I	_td.			
Call Related Activitie	8			Glose
Date/Time	Lee Hogan Lee Hogan Barb Hutchinson Lee Hogan	Description Generate Proposal Status Meeting Golf Outing at Harboursid Follow-up - Customer Sati Dinner meeting Follow up phone call reg	Category Sales Follow-up	Update Comglete
	or: 03/12/2008 21:00:0 Lee. Lee should be in		just my related Activities	
				Ŧ

The Manage Activities dialog displays a list of all scheduled activities with this contact in Infor CRM.

- 3. Click on the **Just My Related Activities** check box to only display the activities where you are the leader.
- 4. Click on the **Update...** button to display the Infor CRM activity dialog and update any relevant details.

Schedule To-Do	>			×
General Recu	ming Attachments			
Start Time: Duration:	03/12/2008 21:00	Timeless 🛛 🗹 Alarm:	Auto rollover to next day	•
	Contact     Contact			
Name:	Abbott, John	Opportunity:	Abbott LtdPhase3	Q
Account:	Abbott Ltd.	Ticket:		Q
Regarding:	Generate Proposal			
Location:				
Notes	Generate a revision for Lee. Lee shoul close of business.	d be in the office to work toge	ether to get this document out by	*
				÷
Priority:		Category:	Sales	
Leader:	Hutchinson, Barb	Scheduled by Barb Hutch for 09/12/2008 21:00	inson on 28/11/2008 00:09 origina	ly
Time Zone	-		OK Cancel H	lelp

- 5. Click on the Manage Activities **Complete...** button to display the Infor CRM, Complete activity details dialog. The inbound call can be associated with this activity by adding additional information in the Notes area.
- 6. Click **OK** when completed.
- 7. Close the intelli-CTi Manage Activities dialog.
- 8. If you want to schedule a follow-up activity with this caller or any other contact in Infor CRM, click on the relevant **Schedule Follow-up Activity** radio button to select the follow-up activity type.
- 9. Click on the Schedule... button

	nbers Resources Recurring Attachments	
Start Time:	22/05/20151508 Timeless Alam: 15 v minute	±s ⊽
Ouration:	15  Minutes  Auto rollover to next day	
	Contact     O Lead	
Name:	Abbott, John Q Opportunity:	Q
Account:	Abbott Ltd. Q Ticket:	Q
Regarding: .ocation:	Follow up phone call regarding incoming call recieved on 22/06/2015 14:16:20	
	John called to discuss arrangements for a product demonstration. He needs to get an application	
Notes	The VP for sales, Lou Balbo, needs to be copied in on all communications.	*
Notes	installed ASAP.	*
Notes	installed ASAP.	×

- 10. The Infor CRM Schedule Activity dialog is displayed and automatically populated with the phone call details captured in intelli-CTi, call date, time, duration and notes.
- 11. Complete the Infor CRM Schedule dialog then **OK**.
- 12. Click on the **Record History**, **Create History**... button to record the call details in Infor CRM Notes/History.

Your system configuration might be set to automatically record telephone calls to the Infor CRM History. See page 62.

Edit Completed	I Phone Call for John Abbott					×
	hments					
Completed:	22/06/2015 15:10		Scheduled:	22/06/2015	5 14:16	
Duration: Result:	16 v minutes v	Timeless		<u>Users</u>	Resources	
Hesuit:						
	Contact     Contact					
Name:	Abbott, John		Opportunity:			
Account:	Abbott Ltd.		Ticket:			
Regarding:	Inbound Call (Established)					
Location:						
Notes	John called to discuss arrangements for ASAP. The VP for sales, Lou Balbo, needs to b			-	n application installe	∧ t
Priority:	None		Category:			
Leader:	Administrator	Scheduled	by Administrat	pr on 22/06/2	015 15:10	
Follow-Up	I Meeting         Phone Call           Automatic Follow-Up: <none></none>	<u>I</u> o-Do		Over Notes Over Attachm	ients	
			0	K C	Cancel Hel	ρ

13. Click OK.

# Campaign/Lead Source Tab

telli-CTi - Telephone Call V			
ntelli-CTi	for Infor CRM		
Hanage post telephone	pup e call actions and activites.	Complete	Minimize
	unt: Abbott Ltd. tact: John Abbott		Re-Associate
Call Info Activity Managemer	t Campaigns/Lead Sources Opportunities	Tickets	
	opportainated	TICKELS	
	aigns and Contact Lead Sources tribute this telephone call to an Infor CRM Camp.	aion and/or Contact I	ead Source.
		-	
Infor CRM Marketing Car	npaigns		
Related Campaign Respo	nse for this call		
Call Related Campaign:	(None)		
Response Status:	No Campaign response has been added for the	is telephone call.	
Add Quick Response	Add a quick Campaign response for the s This action will add a campaign response		
Add Detailed Response	Add a detailed Campaign response for thi		
Add Dotaned Response	This action provides user definition of the	Campaign response	
Infor CRM Contact Lead	Sources		
Infor CRM Contact Lead Related Contact Lead Sou	urce for this call		
Related Contact Lead Sou Call Related Lead Source:	urce for this call (None)		
Related Contact Lead Sou	urce for this call	his telephone call.	
Related Contact Lead Sou Call Related Lead Source:	urce for this call (None)		today's date.
Related Contact Lead Sou Call Related Lead Source: Lead Source Status:	(None) No Contact Lead Source has been added for t	for this Contact with	-
Related Contact Lead Sou Call Related Lead Source: Lead Source Status: Add Quick Lead Source	(Kione) No Contact Lead Source has been added for t Add the suggested Contact Lead Source	for this Contact with	-

- 1. The **Campaign/Lead Source** tab will allow you to associate this call with a Campaign by creating a response record, and/or Lead Source within Infor CRM.
- 2. Click on the Add Quick Response button to add the default response values.
- 3. Click on the Add Detailed Response... button to record a campaign response.

intelli-CTi - Mana	age Campaign	Responses				<b>—</b> ×
intelli	-CTi <sup>™</sup> fo	r Infor CRM			C.	C BA
	ted Campaign: optionally attribut	s e this telephone call to an Inf	or CRM Marketi	ng Campaign		Close
John Abbott						
Campaign Res	sponses For: J	ohn Abbott				
Campaign Name		Stage	Method		Response Dat	e
Dell Optiplex Spe	cial	E-Mail Blast 2	E-mail		30/10/2013	
Windows Vista C	Conversion	Postcard Mailer	E-mail		08/11/2013	
Lenovo X Series	Intro	Follow Up Phone Call	E-mail		02/12/2013	
Campaign Name Dell Optiplex Spe Lenovo X Series PhoenixPC Dell S	Intro	Description Discounted pricing on I Introduction of new X Seminar to distribute in	Series	Active		
Response Date:	22/06/2015		Comments:			
Method:	Phone	•				~
Stage:	E-Mail Blast 1	•				
Lead Source:		Q				~
	Automatical	ly add Contact Lead Source			Ad	d Response

- 4. Click on the Active Campaigns Only check box to see or hide non-active campaigns.
- 5. From the Manage Campaign Response dialog, click on the **campaign name** associated with this call.
- 6. Complete the details in the lower section of the dialog then click on the Add Response button.

The response will be added to the Campaign Response For: John Abbott section of the Manage Campaign Response dialog.

7. Click on the **Close** button when completed.

- 8. Click on the **Add Quick Lead Source...** button to add the suggested lead source and today's date.
- 9. Click on the Add Detailed Lead Source... button to record a lead source in Infor CRM.

ntelli-CTi - Ma	nage Contact Lead So	urces			<b>×</b>
intell	i-CTi <sup>™</sup> for In	for CRM			A RAN
	lated Lead Sources optionally attribute a Co	intact Lead Source to thi	s telephone call.		Close
John Abbott					
Contact Lead	d Sources For: John A	lbbott			
Lead Date	Description		Туре		
24/02/2007	Trade Show - Gene	eral	Trade Show	N	
Add New Cor	ntact Lead Source				
Available Co	ntact Lead Sources				
Active Lead	d Sources Only				
Description			Туре	Status	~
Advertising - G	eneral		Advertising	Active	-
Advertising - W	/eb Banner Ads		Advertising	Active	=
Direct Mail - Ge	neral		Direct Mail	Active	
E-mail - Genera	l.		E-mail	Active	
Event - Genera	l i i i i i i i i i i i i i i i i i i i		Event	Active	
Durchsead Liet	General		Durchsead Liet	Active	•
		Lead Source Date:	22/06/2015	Add	I Lead Source

The Available Contact Lead Sources area of the Manage Contact Lead Sources dialog list the Lead Sources from Infor CRM.

- 10. Click on the required Lead Source in the **Available Contact Lead Sources** section that you want to associate with this contact, then the **Add Lead Source** button.
- 11. The Lead Source is then listed in the **Contact Lead Sources for: Contact Name** section.
- 12. Click on the Active Lead Sources Only check box to see or hide non-active Lead Sources.
- 13. Click on the **Close** button when completed.

# **Opportunities Tab**

intelli-CTi - Telepho	one Call Wrapup				×
intelli-	CTi <sup>™</sup> for I	nfor CRM			
	Call Wrapup t telephone call ac			Complete	Minimize
Associatio	Account: A Contact: J	bbott Ltd. ohn Abbott			Re-Associate
				_	
Call Info Activity M	lanagement Car	npaigns/Lead Source	s Opportunities	Tickets	
		Opportunity to relate	to this telephone	call. Add Ne	w
Opportuni	ty: Abbott Ltd	Phase2			
Status:	Closed - V	/on	Stage:	6-Decision	
Close Dat	e: Estimated:	19/04/2014 14:47:	Actual	26/03/2014 14:47:	
Comments		d trying to standardia n different tools. Pu			

The Opportunities tab is use to associate this call to an existing opportunity or create and associate a new opportunity.

- 1. Click on the **Opportunities** tab.
- 2. Click on the Lookup... button to lookup an existing opportunity.
- 3. Click on the Add New... button to open the Add New Opportunity dialog.

# Tickets Tab

intelli-CTi - Telephon	e Call Wrapup
intelli-0	TT for Infor CRM
Manage post t	all Wrapup Complete Minimize Minimize
Association	Account: Abbott Ltd. Contact: John Abbott Re-Associate
Call Info Activity Mar	nagement Campaigns/Lead Sources Opportunities Tickets
	I Support Ticket
You can opti	onally select a support Ticket to relate to this telephone call.
Infor CRM Ticket I	Aanagement
Ticket Numb	er: 000032
Subject:	
Status:	Closed
Description:	Samantha Brint 10202006 7:34:47 PW (US Mountain Standard Time) Some of the DVD drives of the new Tecra laptops are not working properly. When playing a satis presentation, some of the systems are getting the following error. Video cannot be shown on the computer monitor because of one of the following reasons: a) Low video memory. Please try using lower display resolution and/or colors.
Resolution:	Samantha Brink 10/21/2006 10:35 AM (US Mountain Standard Time) I found another mention that may explain the issue. "For many laptops to work properly who DVD video, a BIOS upgrade may be necessary." It may be that the laptops having problems do nhave the mark recent version of the BIOS (16 released April 2002) for the Tecra. According to the instructions, you'll need to create an installation diskette, and then boot the laptop from the installation diskette to update the flash BIOS.

The Ticket tab enables you to associate this call activity with an existing Ticket record.

- 1. Click on the **Tickets** tab.
- 2. Click on the Lookup... button to lookup an existing Ticket record in Infor CRM.

# **Telephone Call Wrapup Buttons**

# Complete

1. Click the Complete button to save and close the Telephone Call Wrapup dialog.

# Re-Associate...

1. Click on the **Re-Associate...** button to associate this call with another contact in Infor CRM.

intelli-C	Ti - Associate Tele	phone Call			×
int	elli-CT	for Infor CRM			
	Telephone Call As Would you like to as		a related entity in Infor CRM	?	
Select s	suggested call relate	d Account/Contact or searc	h for an alternative.		
				Select	Cancel
Relate	ed Account: Abbo	tt Ltd.			
Contact	Name	Title	Department	City	
John Ab	bott	President	Administration	Chicago	
	ontacts Find Cor	tact Find Account	Add <u>N</u> ew		
	Inbound Ca	II: 18005551234 (E	stablished)		
	DDI: 201	Relating to:			

2. From the Associate Telephone Call dialog select the required button:

- All Contacts Displays a list of all contacts at the selected Account.
- Find Contact... Enables the user to search Infor CRM for the required contact name.

- Find Account... Enables the user to search Infor CRM for the required account name.
- Add New... Opens the Infor CRM Add New Contact/Account dialog.

3. Once the required contact has been located, click on the Select button to Re-Associate the call.

# <u>Minimize</u>

The Minimize button will temporarily close the dialog and store it in the My Call Tasks section of the Telephony Call Manager.

See the User Call Tasks section on page 46 for more information.

More Tabs	User Activities (Calls)	User Call Tasks			
🕂 My	Call Tasks			Action Task Reas	ssign Refresh
Task Date	∇ Task Type	Description	State	Reassigned By	Reassigned Date
22/06/2015	Wrapup	Call Wrapup with: John Abbott (A	bbott Ltd.) - Inbound Call (Established Minimiz	ed	

# **CRM Details**

# Schedule a New Activity

If the Schedule Activity option was used to schedule a new activity, this would appear on the Account/Contacts Activities tab.

Activities 🛛 🖄							
	Date/Time ∇	Duration	Leader	Regarding	Category	Opportunity	
🔇 🎼	22/06/2015 15	15m	Administrator	Follow up phone call regarding inco			
🕢 闷	4 23/12/2008		Hogan, Lee	Dinner meeting			
ų.	3 18/12/2008 00	1h	Hutchinson, B	Follow-up - Customer Satisfaction	Follow-up		
10	4 12/12/2008 14	5h	Hogan, Lee	Golf Outing at Harbourside Port Cour			
🗿 🎼	04/12/2008 17	1h	Hogan, Lee	Status Meeting		Abbott LtdPhase I	
0	03/12/2008 21	4h	Hutchinson, B	Generate Proposal	Sales	Abbott LtdPhase3	

# **Call History**

If selected, the history of this call can be seen on the Account/Contact Notes/History tab.

More Tabs	Notes/History	Literature Requests	Attachments	Lead Sources	Opportunities	Processes	Associations	Sumn	nary		
ү Filter (	Options >>	🔏 Edit / View Notes	E-mai	i 📑 🛃 Wo	rd 🔹 🚷 Rei	fresh f	Records shown:	28			
Туре	Date/Time	User Name	Contact Name	e Result	Descri	otion			~	John called to discuss arrangements for	~
Phone Call	22/06/2015 1	5:2 Administrator	Abbott, John		Inbour	id Call (Estat	blished)			a product demonstration. He needs to	
Phone Call	22/06/2015 1	:1Administrator	Abbott, John		Inbour	d Call (Estat	blished)			get an application installed ASAP.	
Phone Call	26/05/2015 1	5:1 Hogan, Lee	Abbott, John	intelli-CT	'i - Misse Inbour	d (Missed)				The VP for sales, Lou Balbo, needs to	
Document	25/11/2014 16	6:C Hogan, Lee	Abbott, John	Complet	e Conta	ct Report				be copied in on all communications.	
Document	25/11/2014 1	5:4 Hogan, Lee	Abbott, John	Complet	e Compa	any Informati	ion				
Document	25/11/2014 1	Honan Lee	Abbott John		Conta	rt Renort			Ŧ		Ŧ

# **Incoming Telephone Number Not Recognised**

If the incoming telephone number is not recognised as an existing number in Infor CRM, the user can manually associate the call with an existing Contact, Account or Lead, or create a new Account/Contact record.

# **Scenario**

David Avery from Arnold Publications calls you from his mobile. David's mobile number is not stored against his contact record in Infor CRM. You need to manually find David's record and associate this new Mobile Phone number.

# **Step by Step**



1. The intelli-CTi panel expands from the side-bar to notify of the call. In Infor CRM, no contact details are displayed as the incoming number is not recognised.

intelli-C	Ti - Associ	iate Telephone Call			×
int	elli-	•CTi <sup>™</sup> for Infor (	CRM		
		e Call Association like to associate this teleph	one call to a related entity in In:	or CRM?	
Select s	suggested	call related Account/Contac	t or search for an alternative.		
Next A	ction:	Show Selected Entity	•	Select	Cancel
Relate	ed Accoun	t: No Account/Contact	was found relating to this t	elephone number	
Contact	Name	Title	Department	City	
All C	ontacts	Find Contact   Find Acco	punt		
(R)	Inbou	nd Call: 01329123	123	Ar	nswer <u>C</u> all

- 2. The Associate Telephone Call dialog is displayed but no caller details are listed.
- 3. Click on the Answer button or pick up the telephone receiver to answer the call.
- 4. You establish that the call is from David Avery at Arnold Publications. From the Associate Telephone Call dialog, click on the **Find Contact...** button.

Lookup Conta	ict - Lastname			
	Lastname	Starting With 🛛 🗸	avery	ОК
Name	Account	Phone	Authorized	
Avery, David	Arnold Publications	(808) 555-7714	No	Cancel
				Help
	and the second se			_

5. From the Infor CRM Lookup dialog, locate David Avery's contact record.



6. When you have finished the call, click the intelli-CTi **Hangup** button or replace the telephone receiver to close the call.

intelli-CTi - Telephone Call Wrap	pup	<b>×</b>
intelli-CTi <sup>™</sup> fo	r Infor CRM	
Telephone Call Wrapup Manage post telephone ca	Il actions and activites.	Minimize
	: Arnold Publications : David Avery	Re-Associate
Call Info Activity Management	Campaigns/Lead Sources   Opportunities   Tickets	1
Call Statistics / Inform Statistical call data and r	lation elated information about this telephone call.	
Call Statistics		
Call Direction (Outcome): Call Start Date/Time (Duration):	Inbound (Established) 22/06/2015 15:27:35 (00:00:02)	
Call Related Information		
Call Description / Regarding:	Inbound Call (Established)	
Call Category:		
Call Result:		
		^ •

7. The Telephone Call Wrapup dialog is automatically displayed. Complete the details on the **Telephone Call Wrapup** dialog then click on the **Complete** button.

intelli-TN	S: Capture New Telephone Nur	nber	<b>EX</b>			
inte	elli-TNS					
Capture	New Telephone Number: 0	1329123123	Cancel			
David Av	ery, Arnold Publications					
		telephone call was not associated to th one Number to this Account/Contact for				
	Add/Replace Specified Telephone Number Capture this telephone number as a specific number for this Contact.					
	Current Telephone Numb	ers (Available Types)				
	Number Type	Number	Extension			
	Direct Number	(808) 555-7714				
	Mobile Number	(808) 555-4470				
	Contact Fax Number	(808) 555-7789				
	Home Number					
	Pager Number					
	Other Number #1					
	Capture Only for Contact Capture New Contact Telephone Number for this Contact. (Incoming call recognition only)					
	Capture Only for Account Capture New Account Telephor (Incoming call recognition only)	ne Number for this Account.	Capture			

- 8. The Capture New Telephone Number screen will be displayed. Here you can either:
  - Replace one of David's existing telephone numbers with the number he called from.
  - Add the number he called from as one of the empty telephone number types.
  - Add the number he called from as a 'Captured Number' for the Contact.
  - Add the number he called from as a 'Captured Number' for the Account.
  - Cancel without capturing the number.

The Capture New Telephone Number screen can be disabled in your intelli-CTi User/Team Profile. See User/Team Profiles – General Tab on page 59.

For details of how to manage 'Captured Numbers', see intelli-TNS - Manage Telephone Numbers Window on page 50.

# Making Outbound Calls – Infor CRM LAN Client

Outbound phone calls can be made using intelli-CTi in a number of ways:

• Manually using the telephone handset.

If the number dialed exists in Infor CRM then the Associate Telephone Call dialog will be displayed for confirmation of the contact being called.

• Using the call number buttons in Infor CRM.

(301) 555-8880	2
----------------	---

Visibility of the call number button is dependent on your system configuration. See TNS Telephone Number Fields on page 68

 Right mouse button menu option from the intelli-CTi navbar button and select the Dial Current Contact/Account option.

Show intelli-CTi Call Manager
Dial Current Contact
Dial Current Account Associate Account/Contact To Call
i <u>n</u> telli-CTi Reports
intelli-CTi System Settings

• Dial directly using the intelli-CTi Dialer.



On dialing a number that exists in Saleslogix, the Associate Telephone Call dialog will be displayed for confirmation of the contact being called.

• Using the Show Dialer button on the Infor CRM toolbar.

🚨 Inteili-(	CTi <sup>™</sup> for Infor CRM	
Abbott Ltd.		
Account All Contact	is	Cancel
All Account Contacts:		
Contact Name	Title	Primary 4
John Abbott	President	Yes
Lou Balbo	VP of Sales	No
Dean Drew	VP of Cust Service	No
Sydney Hamilton	Director of IT	No
TNS Telephone	e Numbers:	<u>M</u> anage <u>D</u> ial
Number Type	Telephone Number	Restricted
Direct Number	(312) 555-7854	No
Home Number	(312) 555-3543	No
Mobile Number	(312) 555-8685	No
Modile Number	(312) 555-7545	No

• Double clicking on a number from the intelli-CTi Call History display.

ntelli-(	CTi™				S
utbound Calls Inbour	nd Calls M	issed Calls			
Call Start	Duration	Call End	Number	Call Info 1	Call In ^
22/06/2015 15:30:38	00:00:02	22/06/2015 15:30:40	01329123123	David Avery	Owner =
22/06/2015 14:18:28	00:16:00	22/06/2015 14:34:28	18005551234	John Abbott	President
17/06/2015 15:25:31	00:22:12	17/06/2015 15:47:43	5551234567		
17/06/2015 15:21:13	00:00:06	17/06/2015 15:21:19	5551234567		
17/06/2015 15:20:49	00:00:03	17/06/2015 15:20:52	5551234567		
17/06/2015 15:19:51	00:00:03	17/06/2015 15:19:54	5551234567		
17/06/2015 15:18:02	00:00:01	17/06/2015 15:18:03	5551234567		
17/06/2015 15:17:23	00:00:28	17/06/2015 15:17:51	5551234567		
17/06/2015 15:16:48	00:00:01	17/06/2015 15:16:49	5551234567		-
( [					F.

• Use the Redial button from the Telephony Call Manager.

User Call History								
🧟 My Call H	listory (Administrator)						Call Wrapup Redial	
Call Start Time	∇ Call Description	Duration	CLI (CallerID)	Direction	Result	Account Name	Contact Name	
22/06/2015 15:26	Inbound Call (Missed)	00:00:00	01329123123	Inbound	Missed			
22/06/2015 14:16	Inbound Call (Established)	00:16:00	18005551234	Inbound	Established	Abbott Ltd.	John Abbott	
22/06/2015 14:15	Inbound Call (Missed)	00:00:00	18005551234	Inbound	Missed	[Abbott Ltd.]		
22/06/2015 14:14	Inbound Call (Missed)	00:00:00	18005551234	Inbound	Missed	[Abbott Ltd.]		
22/06/2015 14:13	Inbound Call (Missed)	00:00:00	18005551234	Inbound	Missed	[Abbott Ltd.]		
22/06/2015 14:12	Inbound Call (Missed)	00:00:00	18005551234	Inbound	Missed	[Abbott Ltd.]		

# **Dialing Out Using the Call Number Buttons**

Work:	(954) 555-1010	R	🗹 Prima
Mobile:	(954) 555-3205	<u>کړ</u>	ALM Pr
Fax:	(954) 555-1200		Phs
Home:		$\geq$	DoN
Other:		$\mathbf{\tilde{z}}$	De
	Joe	*io <u>n</u> In	C.de

1. From Infor CRM Account/Contact views, click on the call number button.



Selection of the telephone button as a dial button is subject to your intelli-CTi settings. Contact your Infor CRM administrator for more information.



2. The intelli-CTi panel will be automatically displayed showing the call details.

# No Answer

1. If the phone is not answered, click on the **Hangup** button to finish the call.

intelli-CTi - Telephone Call Wra	pup 💽
intelli-CTi <sup>™</sup> fo	
Manage post telephone ca	
	t: Clearview Corporation Inc. t: Joe Adams Re-Associate
Call Info Activity Management	Campaigns/Lead Sources Opportunities Tickets
	nation elated information about this telephone call.
Call Statistics Call Direction (Outcome): Call Start Date/Time (Duration):	Outbound (No Answer) 22/06/2015 15:41:20 (00:00:00)
Call Related Information	
Call Description / Regarding:	Outbound Call (No Answer)
Call Category:	
Call Result:	intelli-CTi - No Answer ***
	~

2. The Telephone Call Wrapup dialog will be displayed. Click on the **Complete** button to close this dialog and record the call to the Account/Contact History.

More Tal	abs	Notes/History	Literatur	e Requests	Attachments	Lead Source	es Opport	tunities	Processes	Associations	Summary	
ү Fi	ilter Op	otions >>	🖊 Edit	/ View Notes	E-ma	i 📑	Word	🚷 Re	fresh	Records shown:	1	
Туре		Date/Time	Γ.	User Name	Conta	t Name	Result	[	Description			*
Phone C	Call	22/06/2015	15:43:54	Administrato	r Adam	s, Joe	intelli-CTi -	- No Ai (	Outbound Ca	l (No Answer)		
												-

# Line Busy



1. The intelli-CTi display will change status to display the line busy. Click the **Hangup** button.

intelli-CTi - Telephone Call Wra	oup	×
intelli-CTi <sup>™</sup> fo	r Infor CRM	Z
Telephone Call Wrapup Manage post telephone ca		•
	Clearview Corporation Inc.     Re-Associa     Joe Adams	ite
Call Info Activity Management	Campaigns/Lead Sources Opportunities Tickets	
Call Statistics / Inform	nation	
Call Statistics	elated information about this telephone call.	
Call Direction (Outcome): Call Start Date/Time (Duration):	Outbound (No Answer) 22/06/2015 15:41:20 (00:00:00)	
Call Related Information		
Call Description / Regarding:	Outbound Call (No Answer)	
Call Category:		
Call Result:	intelli-CTi - No Answer	
		*
		Ŧ

2. The Telephone Call Wrapup dialog will be displayed. Click on the **Complete** button to close this dialog and record the call to the Account/Contact History.

# Call Answered

- 1. If the call is answered the intelli-CTi display will change the status and the **Hold** button will be made available.
- 2. If required, click on the **Call Notes** button on the toolbar.





The Call Notes function enables the user to capture details of the conversation while still on the phone. The notes will be automatically saved to the Wrapup dialog and the Infor CRM Notes/History.

3. At any time during the call you can put the call on **Hold** using your telephone handset or by clicking the intelli-CTi **Hold Call** button.



The call status will change to "On-Hold" and the "Reconnect Call" button will be enabled.

- 4. Click on the Reconnect Call button to continue the call.
- 5. When the call is completed, replace the handset on the phone or click on the intelli-CTi **Hangup** button.

# Call Wrapup

intelli-CTi - Telephone Ca	all Wrapup	×
intelli-CT	i <sup>™</sup> for Infor CRM	
Manage post telepi	Wrapup hone call actions and activites. Complete Minimi	ze
	Account: Mark Dan Contact: Alex Ballard Re-Assoc	siate
Call Info Activity Manage	ement Campaigns/Lead Sources Opportunities Tickets	
Call Statistics /		
Statistical call da	ata and related information about this telephone call.	
Call Statistics		
Call Direction (Outcome): Call Start Date/Time (Dura		
Call Related Informatio	on	
Call Description / Regard	ting: Outbound Call (Established)	
Call Category:		
Call Result:		
	in our application and would like me to send him an information pack so he can discuss	S 🔺
this with his boss.		
		-

# The Telephone Call Wrapup dialog will be automatically displayed at the end of the call.

1. The **Telephone Call Wrapup** dialog offers multiple options for the management of a completed phone call:

# Call Wrapup - Call Info Tab

- 1. You can type a short description of the call into the **Call Description/Regarding** field. This is the equivalent of the **Regarding** field in an Infor CRM Notes/History item.
- 2. You can select a **Call Category** from the picklist or type one in. This will be copied into the category field of the Infor CRM Notes/History item.
- 3. You can select a **Call Result** from the picklist or type one in. This will be copied into the result field of the Infor CRM Notes/History item.
- 4. Any notes made in the **Call Notepad** will be automatically populated on the Call Info tab. Additional notes can be typed. These details will be stored on the Infor CRM Notes/History tab.

Call Wrapup - Activity Management Tab



1. The **Manage Activities** section on the **Activity Management** tab displays the number of existing activities associated with this contact.

#### Manage Activities (3)

2. Select the **Manage...** button to associate this call with an existing activity.

For example: if you had scheduled a call for tomorrow with a contact but the contact called unexpectedly today, you could associate this call with the scheduled call for tomorrow and complete the details.

Call Related A				at h
12 Manage Infor CF	RM activities relating to t	his Account/Contact.		
ohn Abbott, Abbott I	.td.			
all Related Activitie	s			Clos
Date/Time	User	Description	Category	
03/12/2008 21:00		Generate Proposal	Sales	Updat
04/12/2008 17:30		Status Meeting		Comple
12/12/2008 14:30		Golf Outing at Harboursid		
18/12/2008	Barb Hutchinson	Follow-up - Customer Sati	Follow-up	
	Lee Hogan	Dinner meeting		
<b>S</b> 18/11/2010 16:54	Administrator	Follow up phone call reg		
		Show .	just my related Activities	
	or: 03/12/2008 21:00:0			
enerate a revision for lose of business.	Lee. Lee should be in t	the office to work together to get	this document out by	
lose of business.				

The Manage Activities dialog displays a list of all scheduled activities with this contact in Infor CRM.

- 3. Click on the **Just My Related Activities** check box to only display the activities where you are the leader.
- 4. Click on the **Update...** button to display the Infor CRM Activity dialog and update any relevant details.

ieneral Recu	urring Attachments			
Start Time:	03/12/2008 21:00	Timeless 🔽 Alarm:	15 • minutes	•
Duration:	4 v hours v		Auto rollover to next day	
	Contact     Contact			
Name:	Abbott, John	, Opportunity:	Abbott LtdPhase3	Q
Account:	Abbott Ltd.	, Ticket:		Q
Regarding:	Generate Proposal			
Location:				
Notes	Generate a revision for Lee. Lee shor close of business.	uld be in the office to work toge	ther to get this document out by	*
				-
Priority:		Category:	Sales	
Leader:	Hutchinson, Barb 🔍	Scheduled by Barb Hutchi for 09/12/2008 21:00	inson on 28/11/2008 00:09 origin:	ally

5. Click on the Manage Activities **Complete...** button to display the Infor CRM Complete Activity details dialog.

The inbound call can be associated with this activity by adding additional information in the Notes area.

- 6. Click OK when completed.
- 7. Close the intelli-CTi Manage Activities dialog.
- 8. If you want to schedule a follow-up activity with this caller or any other contact in Infor CRM, click on the relevant **Schedule Follow-up Activity** radio button to select the follow-up activity type.
- 9. Click on the Schedule... button

Schedule Phone	Call	×
General Membe	ers Resources Recurring Attachments	
Start Time: Duration:	82/01/2015/15/02         Timeless         Alam:         15 v         minutes v           15 v         minutes         Alam:         15 v         minutes v	-
	Contact     Cutact	
Name:	Abbott, John Q Opportunity: Q	
Account:	Abbott Ltd. Q Ticket: Q	
Regarding:	Follow up phone call regarding incoming call recieved on 22/06/2015 14:16:20	•
Notes	John called to discuss amangements for a product demonstration. He needs to get an application installed ASAP. The VP for sales, Lou Babo, needs to be copied in on all communications.	•
Priority:	Category:	•
Leader:	Administrator Q Scheduled by Administrator on 22/06/2015	
Time Zone	OK Cancel Help	

- 10. The Infor CRM Schedule Activity dialog is displayed and automatically populated with the phone call details captured in intelli-CTi, call date, time, duration and notes.
- 11. Complete the Infor CRM Schedule dialog then OK.
- 12. Click on the Record History, Create History... button to record the call details in Infor CRM.

Your system configuration might be set to automatically record telephone calls to the Infor CRM History. See page 62.

ieneral Attac	chments				
Completed: Duration:	22/06/2015 15:10 16 v minutes v	Timeless	Scheduled:	22/06/2015	14:16 Resources
Result:					
	Contact     Contact				
Name:	Abbott, John		Opportunity:		
Account:	Abbott Ltd.		Ticket:		
Regarding:	Inbound Call (Established)				-
Location:					
Notes	John called to discuss arrangements for a ASAP. The VP for sales, Lou Balbo, needs to be			-	n application installed
Notes	ASAP.			-	n application installed
(ji)	ASAP. The VP for sales, Lou Balbo, needs to be	copied in on a	all communicati	ions.	
Priority:	ASAP. The VP for sales, Lou Balbo, needs to be None	copied in on a	all communication Category: by Administration	ions.	w 015 15:10

13. Click OK in Infor CRM.

# Call Wrapup - Campaign/Lead Source Tab

telli-CTi - Telephone Call )		
ntelli-CTi	for Infor CRM	
Telephone Call Wra Manage post telephor	pup Complete In Complete	<i>linimize</i>
	ount: Abbott Ltd. Re-A	Associate
	nt Campaions/Lead Sources Onnortunities Tickets	
Call Info Activity Manageme		
	paigns and Contact Lead Sources attribute this telephone call to an Infor CRM Campaign and/or Contact Lead Sou	
nfor CRM Marketing Ca	mpaigns	
Related Campaign Resp	onse for this call	
Call Related Campaign:	(None)	
Response Status:	No Campaign response has been added for this telephone call.	
Add Quick Response	Add a quick Campaign response for the suggested Campaign. This action will add a campaign response using default values.	
Add Detailed Response	Add a detailed Campaign response for this Contact.	
	This action provides user definition of the Campaign response.	
nfor CRM Contact Lead	Sources	
Related Contact Lead Sc	urce for this call	
Call Related Lead Source:	(None)	
Lead Source Status:	No Contact Lead Source has been added for this telephone call.	
Add Quick Lead Source	Add the suggested Contact Lead Source for this Contact with today's	date
rise action 2680 300106	Add the auggested contact Load Source for this contact with today's	unto.
Add Detailed Lead Source.	This action allows you to specify a Contact Lead Source and date.	
Add Detailed Lead Source.	This action allows you to specify a Contact Lead Source and date.	
Add Detailed Lead Source.	This action allows you to specify a Contact Lead Source and date.	

- 1. The **Campaign/Lead Source tab** will allow you to associate this call with a Campaign by creating a response record, and/or Lead Source within Infor CRM.
- 2. Click on the Add Quick Response button to add the default response values.
- 3. Click on the Add Detailed Response... button to record a campaign response.

mem	-CII fo	or Infor CRM		Contraction of the second	2A
	ted Campaign	s te this telephone call to an In	nfor CRM Marketing Camp	aign. Clos	e
John Abbott					
Campaign Res	sponses For: .	John Abbott			
Campaign Name		Stage	Method	Response Date	
Dell Optiplex Spe	cial	E-Mail Blast 2	E-mail	30/10/2013	
Windows Vista C		Postcard Mailer	E-mail	08/11/2013	
Lenovo X Series	Intro	Follow Up Phone Call	E-mail	02/12/2013	
Campaigns					
Campaigns					
Campaigns Campaign Campa Campaign Name	aigns Only	Description	Status		
Campaigns Campaign Campaign Name Dell Optiplex Spe	aigns Only cial		Dell Optiplex Mo Active		
Campaigns Campaign Campaign Name Dell Optiplex Spe Lenovo X Series	aigns Only cial Intro	Discounted pricing on Introduction of new X	Dell Optiplex Mo Active		
Campaigns Campaign Campaign Name Dell Optiplex Spe Lenovo X Series	aigns Only cial Intro	Discounted pricing on Introduction of new X	n Dell Optiplex Mo Active C Series Active		
Campaigns Campaign Name Campaign Name Dell Optiplex Spe Lenovo X Series PhoenixPC Dell S	aigns Only cial Intro	Discounted pricing on Introduction of new X	n Dell Optiplex Mo Active C Series Active		
Campaigns Active Campaign Campaign Name Dell Optiplex Spe Lenovo X Series PhoenixPC Dell Si Response Date:	aigns Only cial Intro eminar Invitation	Discounted pricing on Introduction of new X	a Dell Optiplex Mo Active (Series Active information on ne Active		
Campaigns Active Campaign Campaign Name Dell Optiplex Spe Lenovo X Series Phoenix/PC Dell S Response Date: Method:	aigns Only cial Intro eminar Invitation 22/06/2015	Discounted pricing on Introduction of new X	a Dell Optiplex Mo Active (Series Active information on ne Active		
Active Campa Campaign Name Dell Optiplex Spe Lenovo X Series	aigns Only cial Intro eminar Invitation 22/06/2015 Phone	Discounted pricing on Introduction of new X	a Dell Optiplex Mo Active (Series Active information on ne Active		

- 4. Click on the Active Campaigns Only check box to View/Hide non-active campaigns.
- 5. From the Manage Campaign Response dialog, click on the **campaign name** associated with this call.
- 6. Complete the details in the lower section of the dialog then click on the Add Response button.

The response will be added to the Campaign Response For: contact name, section of the Manage Campaign Response dialog.

- 7. Click on the **Close** button when completed.
- 8. Click on the **Add Quick Lead Source...** button to add the suggested lead source and today's date.
- 9. Click on the Add Detailed Lead Source... button to record a lead source in Infor CRM.

	nage Contact Lead Sources			
intell	i-CTi <sup>™</sup> for Infor CRM	٨	25	
	lated Lead Sources optionally attribute a Contact Lead	Source to this telephone call.		Close
ohn Abbott				
Contact Lea	l Sources For: John Abbott			
Lead Date	Description	Туре		
24/02/2007	Trade Show - General	Trade Show		
Add New Cor	itact Lead Source			
Available Co	ntact Lead Source ntact Lead Sources d Sources Only			
Available Co Active Lear Description	ntact Lead Sources d Sources Only	Type	Status	
Available Co Active Lea Description Advertising - G	ntact Lead Sources I Sources Only eneral	Advertising	Active	
Available Co Active Lease Description Advertising - G Advertising - W	ntact Lead Sources d Sources Only eneral feb Banner Ads	Advertising Advertising	Active	
Available Co Active Lease Description Advertising - G Advertising - W Direct Mail - Ge	ntact Lead Sources 1 Sources Only eneral eb Banner Ads neral	Advertising Advertising Direct Mail	Active Active Active	
Available Co Active Lear Description Advertising - G Advertising - W Direct Mail - General E-mail - General	ntact Lead Sources d Sources Only eneral de Banner Ads neral l	Advertising Advertising	Active Active	
Available Co Active Leas Description Advertising - G	ntact Lead Sources d Sources Only eneral de Banner Ads neral l	Advertising Advertising Direct Mail E-mail	Active Active Active Active	
Available Co Active Lear Description Advertising - G Advertising - W Direct Mail - Ge E-mail - General	ntact Lead Sources 1 Sources Only eneral feb Banner Ads neral 1	Advertising Advertising Direct Mail E-mail	Active Active Active Active	

The Available Contact Lead Sources area of the Manage Contact Lead Sources dialog list the Lead Sources in Infor CRM.

10. Click on the required Lead Source in the **Available Contact Lead Sources** section, that you want to associate with this contact, then the **Add Lead Source** button.

- 11. The Lead Source is then listed in the Contact Lead Sources for: contact name section.
- 12. Click on the Active Lead Sources Only check box to View/Hide non-active Lead Sources.
- 13. Click on the **Close** button when completed.

# Call Wrapup - Opportunities Tab

intelli-CTi - Telephone	Call Wrapup					<b>×</b>
intelli-C	Ti <sup>™</sup> for I	nfor CRM				
Manage post tele		tions and activites.		[	Complete	Minimize
Association	Account: A Contact: J					Re-Associate
			-		_	
Call Info Activity Manag	gement Carr	paigns/Lead Source	s Opportunities	Tick	ets	
Call Related C You can option		r Opportunity to relate	to this telephone	call.	Add New	Lookup
Infor CRM Opportun	ity Manage	ment				
Opportunity:	Abbott Ltd	-Phase2				
Status:	Closed - W	'on	Stage:	6-De	cision	
Close Date:	Estimated:	19/04/2014 14:47:	Actual:	26/0	3/2014 14:47:	
Comments:		trying to standardia n different tools. Pu				

The Opportunities tab is used to associate this call to an existing opportunity or create and associate a new opportunity.

- 1. Click on the **Opportunities** tab.
- 2. Click on the Lookup... button to lookup an existing opportunity in Infor CRM.
- 3. Click on the Add New... button to open Infor CRM Add New Opportunity dialog.

# Call Wrapup - Tickets Tab

telli-CTi - Telephone C					_
intelli-C1	for Infor Cl	RM			
Hanage post telep	Vrapup hone call actions and	activites.	Co	mplete	Minimize
	ccount: Abbott Lto Contact: John Abbo				Re-Associate
Call Info Activity Manage	ment Commission ()	ad Sources Opportunit	tiee Tickets		
		ad Jources   Opportuni	ues noncio		
Call Related Su		ket to relate to this telep	hone call		Lookup
	, calloc a support ne	terep			
Infor CRM Ticket Mar	nagement				
Ticket Number:	000032				
noter nomber.	000002				
Subject:					
	Closed				
Subject:	Closed Samantha Brink 100 Some of the DVD dr playing a sales pres Video cannot be shi reasons:	20/2006 7:34:47 PM (US ives of the new Tecra la entation, some of the sy pown on the computer mo	aptops are not wo rstems are getting onitor because of	orking prope the following the	ng error: following
Subject: Status:	Closed Samantha Brink 100 Some of the DVD dr playing a sales pres Video cannot be shi reasons:	ives of the new Tecra la entation, some of the sy	aptops are not wo rstems are getting onitor because of	orking prope the following the	ng error: following
Subject: Status:	Closed Samantha Brink 10/7 Some of the DVD dr playing a sales pres Video cannot be shi reasons: a) Low video memo	ives of the new Tecra la entation, some of the sy own on the computer mo	aptops are not wo vstems are getting onitor because of er display resoluti	orking prope the following one of the f on and/or co	ng error: following

The Ticket tab enables you to associate this call activity with an existing Ticket record in Infor CRM.

- 1. Click on the **Tickets** tab.
- 2. Click on the Lookup... button to lookup an existing Ticket record in Infor CRM.

# Telephone Call Wrapup - Buttons

# Complete

1. Click the Complete button to save and close the Telephone Call Wrapup dialog.

# Re-Associate ...

1. Click on the Re-Associate... button to associate this call with another contact in Infor CRM.

intelli-CTi - Associate	e Telephone Call			×				
intelli-0	<b>Ti</b> <sup>™</sup> for Infor Cl	RW						
	Telephone Call Association     Would you like to associate this telephone call to a related entity in Infor CRM?							
Select suggested cal	I related Account/Contact of	or search for an alternative.						
			Select	Cancel				
Related Account:	Abbott Ltd.							
Contact Name	Title	Department	City					
John Abbott	President	Administration	Chicago					
All Contacts Fir	id Contact   Find Accou	nt						
	I Call: 180055512	34 (Established)						
DDI: 201	Relating to:							

- 2. From the Associate Telephone Call dialog select the required button:
  - All Contacts Displays a list of all contacts at the selected Account.
  - Find Contact... Enables the user to search Infor CRM for the required contact name.
  - Find Account... Enables the user to search Infor CRM for the required account name.
  - Add New... Opens the Infor CRM Add New Contact/Account dialog.
- 3. Once the required contact has been located, click on the Select button to Re-Associate the call.

#### Minimize

The Minimize button will temporarily close the dialog and store it in the **My Call Tasks** section of the **Telephony Call Manager** for completion at a later date.



# Telephony Call Manager, My Call Tasks tab.

# Telephone Call Wrapup - Manage Open Activity

The **Call Wrapup / Manage Open Activity** dialog will be automatically displayed if you wrapup a call relating to an open activity and did not managed it (e.g. it is still "open").

intelli-CTi -	Call Wrapup / Manage Open Activity	
inte	III-CTI <sup>™</sup> for Infor CRM	HOAV Mar Ing
	nage Open Activity telephone call relates to an open activity, please select an action for this activity	Close
31	Update Activity Update the related Phone Call activity for this call and leave the activity "Open".	Update
31	Complete Activity Complete the related Phone Call activity for this call.	Complete
31	Create History Create a new Infor CRM History item for this call (leaving the related Phone Call activity "open").	Create

# The Call Wrapup / Manage Open Activity dialog

The purpose of this dialog is to remind the user that there is still an open activity in Infor CRM that relates to the telephone call they just. This dialog provides further possible actions to manage this activity.

#### **Update Activity**

This action will update the (existing) related Infor CRM phone call activity record with the details of the last telephone call, and leave the existing activity record "open".

Note: This option will not create an additional Infor CRM history record (as the activity is still open).

#### **Complete Activity**

This action will complete the related Infor CRM phone call activity, by launching the standard Infor CRM "Complete Activity" dialog.

Note: Performing this action will also close this dialog.

#### **Create History**

This action will create a new Infor CRM history record with the details of the telephone call, but will not make any changes to the (existing) related Infor CRM phone call activity record.

Note: Performing this action will also close this dialog.

# **CRM Details**

# Schedule a New Activity

If the Schedule Activity option was used to schedule a new activity, this would appear on the Contact/Account Activities tab, Users Calendar and Activities main view.

Activi	Activities X							
	Date/Time ∇	Duration	Leader	Regarding	Category	Opportunity		
🙆 🎼	22/06/2015 15	15m	Administrator	Follow up phone call regarding inco				
🙆 🦻	23/12/2008		Hogan, Lee	Dinner meeting				
ų.	18/12/2008 00	1h	Hutchinson, B	Follow-up - Customer Satisfaction	Follow-up			
18	12/12/2008 14	5h	Hogan, Lee	Golf Outing at Harbourside Port Cour				
0	04/12/2008 17	1h	Hogan, Lee	Status Meeting		Abbott LtdPhase I		
3	03/12/2008 21	4h	Hutchinson, B	Generate Proposal	Sales	Abbott LtdPhase3		

# **Call History**

If selected the history of this call can be seen on the Account/Contact Notes/History tab.

More Tabs	Notes/History	Literature Requests	Attachments	Lead Sources	Opportunities	Processes	Associations	Summary	
ү Filter O	ptions >>	🔏 Edit / View Notes	E-ma	ail 🛛 🛃 Wo	ord 🔹 🚷 Re	fresh	Records shown:	1	
Туре	Date/Time	∇ User Name	Conta	ct Name Re	esult (	Description			
Phone Call	22/06/2015 1	5:43:54 Administrat	tor Adam	s, Joe in	telli-CTi - No Ai (	Outbound Ca	ll (No Answer)		
									-
## **Dialing Out from the Opportunities View**

Dialing a telephone call from the Opportunities view can be performed using the intelli-CTi Dialer. The Dialer will automatically display the telephone details of the opportunity account. From this dialog, a search can also be made to locate any account or contact on the Infor CRM database.

#### **Scenario**

You are updating the opportunity information for the Computer Vacuum – Phase 1 opportunity and want to call the opportunity contact, Cathy Toombs to discuss the current status.

#### **Step by Step**

1. From the opportunity view, click on the **Show Dialer** button



on the Infor CRM toolbar or click the right mouse button on the intelli-CTi navbar button and select Dial Current Contact...

🚨 intelli-	CTI <sup>™</sup> for Infor CRM	
Computer Vaccuum		
Account All Contact	is	Cancel
Account Contact:		
Contact Name	Title	Primary
Jontact Name		
2. Toombs	VP Sales	Yes
2. Toombs	VP Sales	
C. Toombs	VP Sales	Yes
2. Toombs	VP Sales	Yes
TNS Telephone C. Toombs	VP Sales e Numbers:	Yes Aanage Dial
TNS Telephone C. Toombs	VP Sales e Numbers: <u>1</u> Telephone Number	Yes
TNS Telephone C. Toombs Uniter Type Direct Number	VP Sales  e Numbers:  Telephone Number (360) 555-2505	Yes tanage Restricted No

2. From the Dialer dialog, select the phone number then click on the **Dial** button



- The intelli-CTi panel will display the call details.
- 3. When the call has finished, click on the intelli-CTi **Hangup** button or replace the telephone receiver.

4. Complete the Telephone Call Wrapup dialog as described in the previous section, Call Wrapup on page 29.



## **Dialing Out from the Tickets View**

Dialing a telephone call from the Tickets view can be performed using the intelli-CTi Dialer. The Dialer will automatically display the phone details of the Ticket Contact. A search can also be made from the Dialer dialog, to locate any account or contact on the Infor CRM database.

## **Scenario**

You are updating the ticket information for the Flow Matic ticket and want to call the ticket contact, Linda Alvarez to discuss the current status.

## Step by Step

1. From the Ticket view, click on the Show Dialer button



on the Infor CRM toolbar or click the right mouse button on the intelli-CTi navbar button and select Dial Current Contact...

Flow Matic		
Account All Contacts		Cancel
Account Contact:		
Contact Name	Title	Primary
	CEO	Yes
inda Alvarez	Gro	163
Inda Alvarez TNS Telephone N Linda Alvarez		1
TNS Telephone N		1

2. From the Dialer dialog, select the phone number then click on the **Dial** button



The intelli-CTi panel will display the call details.

3. When the call has finished, click on the intelli-CTi **Hangup** button or replace the telephone receiver.

4. Complete the **Telephone Call Wrapup** dialog as described in the previous section, Call Wrapup on page 29.



# Call History – Infor CRM LAN Client

intelli-CTi keeps a record of all telephone call interactions made within Infor CRM. These records can be viewed in many areas.

## Where to find Call History

## Telephony Call Manager

	elli-CTi <sup>™</sup> for In hony Call Manager	nfor CRM				Us	Us er/Team Profile: Defa	ser: Administrator ult System Profile
Team Manager	. Call Statistics							
My Activ	e Call List				Ans	wer Hold Call	Reconnect	Hangup
Call StartTime	/ Caller ID (CLI)	DDI	Ca	Il Status	Contact Nar	ne Ac	count Name	
System Status: Active	Agent Status: Available				Associa	te Assign Process	Goto Contact	Goto Account
User Call History								×
🔊 My Call H	listory (Administrator)						Call Wrapup	Redial
Call Start Time	∇ Call Description	Duration	CLI (CallerID)	Direction	Result	Account Name	Contact Name	-
22/06/2015 17:04	Outbound Call (Established	) 00:07:56	90018883461222	Outbound	Established	Flow Matic	Linda Alvarez	
22/06/2015 17:02	Outbound Call (Established	) 00:01:03	90013605552505	Outbound	Established	Computer Vaccuum	C. Toombs	=
22/06/2015 16:26	Outbound Call (Established	) 00:00:07	90016125557693	Outbound	Established	Mark Dan	Alex Ballard	
22/06/2015 15:51	Outbound Call (Established	) 00:14:09	90016125557693	Outbound	Established	Mark Dan	Alex Ballard	_
22/06/2015 15:49	Outbound Call (Established	) 00:00:27	90019545551010	Outbound	Established	Clearview Corporation Inc	Joe Adams	
22/06/2015 15:46	Outbound Call (No Answer	) 00:00:00	90019545551010	Outbound	No Answer	Clearview Corporation Inc	Joe Adams	
22/06/2015 15:41	Outbound Call (No Answer	) 00:00:00	90019545551010	Outbound	No Answer	Clearview Corporation Inc	Joe Adams	
22/06/2015 15:27	Inbound Call (Established)	00:00:02	01329123123	Inbound	Established	Arnold Publications	David Avery	-
	1 Week	•				Goto Contact	Goto Account	Refresh
More Tabs User	Activities (Calls) User Call Tas	ks						
🚛 My Sche	duled Telephone Calls:	(Todays Calls)				Dial	Goto Contact	Goto Account
Due Date	/ Account Name	Contact Name	Description			Opportunity	Notes	
22/06/2015 15:08:43	3 Abbott Ltd.	Abbott, John	Follow up ph	one call regardin	g incoming call re	cieved	John called t	o discuss arrang
22/06/2015 16:25:15	5 Mark Dan	Ballard, Alex	Follow up ph	one call regardin	g call made on 22	'06/20 <sup>.</sup>	Alex expres	sed interest in ou
All Calls	Today's Calls					Schedule Call	Edit Activity	Complete

The intelli-CTi Telephone Call Manager assists the users in managing their calls within Infor CRM. The call information shown in the Telephony Call Manager is based around the **user's** activities:

My Active Call Lists - current active phone calls being made by the user.

User Call History – a list of all the phone calls the current user has completed.

**My Call Tasks** – a list of phone calls that have got to the Call Wrapup stage but Wrapup details have been postponed until the user is ready to complete the details.

User Activities - a list of all the current user's open Phone Call activities.

See the Telephony Call Manager section on page 43 for further information.

#### **Call History (Account)**

The Call History (Account) tab on the Account Detail view displays call information relating to the selected account and all contacts at the account.

More Tabs Con	tracts Call His	tory (Account)	Notes/History	Activities Literature	Requests Atta	chments Opportunities Res	eller Opportunities Associati	ons Summary			
Call Start Time 🛛 🕅	Call Duration	Direction	Call Result	Related Contact	Related User	Related Activity	Follow-Up Action	Related Opportunity	Related Campaign	Call CLI	Call DDI
03/10/2007 10:42	00:00:04	Inbound	Established	John Abbott	Administrator			Abbott LtdPhase I		(312) 5557678	
01/10/2007 11:43	00:00:00	Outbound	No Answer	(Multiple Contacts)	Administrator					90013125557545	
27/09/2007 16:31	00:00:11	Outbound	Established		Administrator					90013125557678	
27/09/2007 16:28	00:00:00	Outbound	No Answer		Administrator					90013125557678	
27/09/2007 15:40	00:14:14	Outbound	Established		Administrator					90013125557678	
27/09/2007 15:26	00:11:09	Outbound	Established		Administrator					90013125557678	
27/09/2007 15:18	00:00:00	Outbound	No Answer		Administrator					90013125557678	
27/09/2007 14:57	00:00:00	Outbound	No Answer		Administrator					90013125557678	
27/09/2007 14:57	00:00:00	Outbound	No Answer	John Abbott	Administrator					90013125557678	
25/09/2007 13:57	00:00:03	Inbound	Established	John Abbott	Administrator					3125557678	
25/09/2007 13:52	00:00:05	Inbound	Established	John Abbott	Administrator	Follow up meeting regarding in	Follow up meeting regarding			3125557678	
25/09/2007 13:51	00:00:00	Outbound	No Answer	John Abbott	Administrator					90013125557678	
25/09/2007 09:20	00:27:21	Inbound	Established	John Abbott	Administrator	Follow up phone call regarding	Follow up phone call regarding	Abbott LtdPhase2	QGate Launch Car	3125557678	
25/09/2007 09:20	00:00:01	Inbound	Established	Lou Balbo	Administrator					3125557678	
24/09/2007 13:37	00:05:19	Inbound	Established	Lou Balbo	Schwartz, Parr	Follow up meeting regarding in	Follow up meeting regarding			(312) 5557876	
24/119/1000			Cetablished	Lou Balbo	Administrator					312) 5557854	

To access the Call History (Account) tab, locate the required account record then click on the Call History (Account) tab.

Information displayed on this tab:

- Call Start Time The date and time the phone call was made/received.
- **Call Duration** The time duration of the phone call.
- **Direction** Inbound or Outbound call.

- Call Result Established or No Answer.
- Related Contact The name of the contact associated with making or receiving the phone call.
- Related User The name of the Infor CRM user making or receiving the phone call.
- Related Activity The details of the Infor CRM activity that was associated to this call by the named user.
- Follow-Up Action Details of any follow-up activities.
- Related Opportunity Details of any opportunity this phone call was related to.
- Related Campaign Details of any Campaign this phone call was related to.
- Call CLI The CLI phone number associated with this call.
- Call DDI The DDI phone number associated with this call.

#### Call History (Contact)

The Call History (Contact) tab on the Contact Detail view displays call information relating to the selected contact.

More Tabs Note	es/History Cal	History (Contact)	Literature Request	ts Attachments	Lead Sources Opportuni	ies Processes Assoc	iations Summary				
Call Start Time 🛛 🗸	Call Duration	Direction	Call Result	User	Related Activity	Follow-Up Action	Related Opportunity	Related Campaign	Related Lead Source	Call CLI	Call DDI
03/10/2007 10:42	00:00:04	Inbound	Established	Administrator			Abbott LtdPhase I			(312) 5557678	
27/09/2007 14:57	00:00:00	Outbound	No Answer	Administrator						90013125557678	
25/09/2007 13:57	00:00:03	Inbound	Established	Administrator						3125557678	
5/09/2007 13:52	00:00:05	Inbound	Established	Administrator	Follow up meeting regarding	Follow up meeting rega				3125557678	
25/09/2007 13:51	00:00:00	Outbound	No Answer	Administrator						90013125557678	
25/09/2007 09:20	00:27:21	Inbound	Established	Administrator	Follow up phone call regard	Follow up phone call re	Abbott LtdPhase2	GGate Launch Car	r Web - General	3125557678	

To access the Call History (Contact) tab, locate the required contact record then click on the Call History (Contact) tab.

Information displayed on this tab:

- Call Start Time The date and time the phone call was made/received.
- **Call Duration** The time duration of the phone call.
- Direction Inbound or Outbound call.
- Call Result Established or No Answer.
- **Related Contact** The name of the contact associated with making or receiving the phone call.
- Related User The name of the Infor CRM user making or receiving the phone call.
- Related Activity The details of the Infor CRM activity that was associated to this call by the named user.
- Follow-Up Action Details of any follow-up activities.
- Related Opportunity Details of any opportunity this phone call was related to.
- Related Campaign Details of any Campaign this phone call was related to.
- Related Lead Source Details of any Lead Source associated to this phone call.
- Call CLI The CLI phone number associated with this call.
- Call DDI The DDI phone number associated with this call.

# **Telephony Call Manager – Infor CRM LAN Client**

The intelli-CTi Telephony Call Manager assists the users in managing their telephone calls within Infor CRM.

The Telephony Call Manager is divided into three main sections:

- My Active Call List Displays, in list form, all active phone calls related to the current user.
- User Defined area This is the Middle Pane area where a user can place any of the tabs views listed below. Only one tab can be placed in this area at any time.
- Tab area Contains a number of tabs listing calls by the tab criteria.
- 1. To access the Telephony Call Manager, click on the intelli-CTi Call Manager Navbar button.



er i i i i i i i i i i i i i i i i i i i			Infor CRM -	[intelli-CTi Call N	Manager: Adr	ninistrator]			- 🗆 X
Her File Ed	it View Insert S	Schedule Lookup Write	Tools Window	Help	10.				- 8 >
G Back Forward History Navigate	Save Print Gopy Copy Copy Copy Copy	List/Detail View	ity 🚜 Return 📑			emplete E-Mail	Add Contact To Outloo	Speed Search	Dialler telli-CTi
Sales		elli-CTi <sup>™</sup> for Ir ony Call Manager	Ifor CRM				Ust	I er/Team Profile: Def	Jser: Administrato ault System Profile
Sales Dashboard	Team Manager	Call Statistics							
	My Active	Call List				An	swer Hold Call	Reconnect	Hangup
Accounts	Call StartTime	/ Caller ID (CLI)	DDI	C	all Status	Contact Na	me Ac	count Name	
Sontacts	System Status: Active	Agent Status: Available				Associa	ate Assign Process	Goto Contact	Goto Account
	User Call History								0
Leads	🧬 My Call Hi	story (Administrator)						Call Wrapup	Redial
	Call Start Time	Call Description	Duration	CLI (CallerID)	Direction	Result	Account Name	Contact Name	
	22/06/2015 17:04	Outbound Call (Established)		90018883461222 90013605552505	Outbound	Established	Flow Matic	Linda Alvarez C. Toombs	:
	22/06/2015 17:02 22/06/2015 16:26	Outbound Call (Established) Outbound Call (Established)		90013605552505 90016125557693	Outbound	Established	Computer Vaccuum Mark Dan	C. Icombs Alex Ballard	1
	22/06/2015 15:51	Outbound Call (Established)		90016125557693	Outbound	Established	Mark Dan	Alex Ballard	
	22/06/2015 15:49	Outbound Call (Established)		90019545551010	Outbound	Established	Clearview Corporation Inc.		L
-	22/06/2015 15:46	Outbound Call (No Answer)	00:00:00	90019545551010	Outbound	No Answer	Clearview Corporation Inc.	Joe Adams	
8	22/06/2015 15:41	Outbound Call (No Answer)	00:00:00	90019545551010	Outbound	No Answer	Clearview Corporation Inc.	Joe Adams	
intelli-CT i	22/06/2015 15:27	Inbound Call (Established)	00:00:02	01329123123	Inbound	Established	Arnold Publications	David Avery	
		1 Week	-				Goto Contact	Goto Account	Refresh
Calendar	More Tabs User A	ctivities (Calls) User Call Task	(5						
	🚛 My Scheo	luled Telephone Calls:	(Todays Calls)				Dial	Goto Contact	Goto Account
Library	Due Date	Account Name	Contact Name	Description			Opportunity	Notes	
3	22/06/2015 15:08:43	Abbott Ltd.	Abbott, John	Follow up p	hone call regardin	g incoming call re	cieved	John called	I to discuss arran
	22/06/2015 16:25:15	Mark Dan	Ballard, Alex	Follow up p	hone call regardin	g call made on 22	/06/20 <sup>.</sup>	Alex expre	ssed interest in o
Reports									
Marketing									
Service									
Support	All Calls	Today's Calls					Schedule Call	Edit Activity	Complete
ashboards									

## **My Active Call List**

This section of the Telephony Call Manager displays a list of all currently connected calls. Current open calls can be managed from this view:

My Active	C	all List			Answe	er	Hold Call F		Reconnect	Hangup
Call StartTime	Δ	Caller ID (CLI)	DDI	Call St	atus	Conta	act Name		Account Nam	e
22/06/2015 17:19:46		90013125557854		Establ	ished	John	Abbott		Abbott Ltd.	
						_				
				_				_		
System Status: Active		ent Status: <b>ailable</b>			Associate.		Assign Process		oto Contact	Goto Account

#### My Active Call List Buttons:

- Answer Answer the selected call if the Status is Incoming Call.
- Hold Call Put the selected call on hold.
- **Reconnect** Reconnect to the call currently on hold.
- Hangup Close the call and Hangup the phone
- Associate Associate this incoming call with a contact or account. Opens the Associate Telephone Call dialog with multiple options to find an existing or add a new contact/account.
- **Notepad...** Opens the Call Notepad.
- Assign Process... Assign a Contact Process in Infor CRM. This could be a contact process that will guide the user through a series of tasks pre-defined in Infor CRM.
- GoTo Contact Go to the contact record of the selected call.
- GoTo Account Go to the account record of the selected call.

## **My Call History**

This tab displays all the calls the current user has made or received, inbound and outbound.

🧬 My Call	History (Administrator)	)				Call Wra	ipup Redial	
Call Start Time 🛛 🗸	Call Description	Duration	CLI (CallerID)	Direction	Result	Account Name	Contact Name	
22/06/2015 17:04	Outbound Call (Established)	00:07:56	90018883461222	Outbound	Established	Flow Matic	Linda Alvarez	1
22/06/2015 17:02	Outbound Call (Established)	00:01:03	90013605552505	Outbound	Established	Computer Vaccuum	C. Toombs	=
22/06/2015 16:26	Outbound Call (Established)	00:00:07	90016125557693	Outbound	Established	Mark Dan	Alex Ballard	-
22/06/2015 15:51	Outbound Call (Established)	00:14:09	90016125557693	Outbound	Established	Mark Dan	Alex Ballard	
22/06/2015 15:49	Outbound Call (Established)	00:00:27	90019545551010	Outbound	Established	Clearview Corporation In	Joe Adams	
22/06/2015 15:46	Outbound Call (No Answer)	00:00:00	90019545551010	Outbound	No Answer	Clearview Corporation In	Joe Adams	
22/06/2015 15:41	Outbound Call (No Answer)	00:00:00	90019545551010	Outbound	No Answer	Clearview Corporation In	Joe Adams	-
Period Shown:	1 Week	-			G	oto Contact Goto Ac	count Refresh	

**My Call History Buttons:** 

• **Call Wrapup...** – Select the required item in the list then the Call Wrapup button to view the Call Wrapup dialog.

intelli-CTi - Telephone Call Wra	pup		×
intelli-CTi <sup>™</sup> fo	r Infor CRM		
Telephone Call Wrapup Manage post telephone ca		Complete	Minimize
	t: Abbott Ltd. t: John Abbott		Re-Associate
Call Info Activity Management			
Call Info Activity Management	Campaigns/Lead Sources Opportunities Ti	ckets	
Call Statistics / Inform Statistical call data and r	nation elated information about this telephone call.		
Call Statistics			
Call Direction (Outcome): Call Start Date/Time (Duration):	Inbound (Established) 22/06/2015 14:16:20 (00:16:00)		
Call Related Information			
Call Description / Regarding:	Inbound Call (Established)		
Call Category:			
Call Result:			***
John called to discuss arrangem	ents for a product demonstration. He needs to	get an application insta	alled ASAP.
The VP for sales, Lou Balbo, nee	eds to be copied in on all communications.		
,			
			-
- <u> </u>			

- Redial Select the Redial button to call the selected Contact/Account in the list.
- **Period Shown** Click on this dropdown button and select the period of calls to be displayed.



If you have a large amount of call history, selecting 1 Month or All can cause a delay when displaying the My Call History panel.

- GoTo Contact Select to go to the selected contact detailed record in Infor CRM.
- GoTo Account Select to go to the selected account detailed record in Infor CRM.
- **Refresh** Refresh the data being displayed.

#### **User Activities (Calls) Tab**

The User Activities (Calls) tab lists phone call activities that the current user has scheduled in Infor CRM.

More Tabs	User Activities (Calls)	er Call Tasks			
🚁 My	Scheduled Telephor	ne Calls: (Todays Ca	alls)	Dial Goto C	Contact Goto Account
Due Date	Account Name	Contact Name	Description	Opportunity	Notes
22/06/2015 15	:08: Abbott Ltd.	Abbott, John	Follow up phone call regarding in	ncoming ci	John called to discuss a
22/06/2015 16	:25: Mark Dan	Ballard, Alex	Follow up phone call regarding c	all made o	Alex expressed interes
All Calls	Today's Calls			Schedule Call Edit Ac	ctivity Complete

#### User Activities (Calls) Tab Buttons:

• **Dial** – Displays the Dialer dialog which lists all numbers available for the selected contact, and allows you to pick one to dial.

	CTI <sup>™</sup> for Infor CRM	
Abbott Ltd.		
Account All Contact	ts	Cancel
Account Contact:		
Contact Name	Title	Primary
John Abbott	President	Yes
		Manage Dial
TNS Telephone John Abbott	e Numbers:	Manage Dial
TNS Telephone John Abbott Number Type Direct Number	e Numbers: Telephone Number	Manage Diat
TNS Telephone John Abbott Number Type	e Numbers: Telephone Number (312) 555-7854	Manage Dial Restricted No

- GoTo Contact Go to the selected Contact record in Infor CRM.
- GoTo Account Go to the selected Account record in Infor CRM.
- All Calls List all activities of type Phone Call in Infor CRM.
- Today's Calls List today's Infor CRM Phone Call activities.
- Schedule Call... Opens the Infor CRM, Schedule Phone Call activity dialog. The user can schedule a call with any contact in Infor CRM.
- Edit Activity... Opens the selected Phone Call activity for editing in Infor CRM.
- Complete... Opens the Complete Phone Call dialog where the selected call can be completed in Infor CRM.

#### **User Call Tasks**

When an inbound or outbound call has been disconnected by the user hanging up the call, the Telephone Call Wrapup dialog is displayed. If the user cannot complete this dialog, he/she can **Minimize** the dialog for completion at a later date. This will not interrupt any further inbound or outbound calls. The Wrapup Call task is placed in this tab list.

🚜 🔁 My	Call Tasks		Acti	on Task	Reassign	Refresh
Task Date	√ Task Type	Description	State	Reassign	ed By	Reassigned Date
22/06/2015	Wrapup	Call Wrapup with: John Abbott (Abbott Ltd.) - Inboun	d Call (Established Minimized			
22/06/2015	Wrapup	Call Wrapup with: John Abbott (Abbott Ltd.) - Inboun	d Call (Established Minimized			

### User Call Tasks Buttons:

- Action Task... Opens the Telephone Call Wrapup dialog for the selected call.
- **Reassign...** Reassign the selected Wrapup call to another user.
- **Refresh** Refresh the User Call Tasks list.

## **Team Manager Button**

Select this button to display the intelli-CTi Team Manager. The Team Manager allows you to view the current telephony status of other intelli-CTi users. E.g. are they currently available for you to transfer a call to them?

lelepho	ny Team Manag	for Infor CRM					
💰 Telephony '	Team Call Activi	ity		Refresh	Show Hist	ory Close	
Filters: Department: (All Departments)			Telephony Users:  All Users  Active Users  Available Users Constraints				
Telephony User	User Status	Call Related Information		Call Start Time	Call Duration	Call Direction	-
Administrator	Available						
Dan Barret	Not looged in						
Samantha Brink	Not logged in						
Robert Cromack	Not logged in						
Soan Curbough	Not logged in						
Ken Dryden	Not logged in						
Georgine Ekels	Not logged in						
Manuel Fuentes	Not logged in						
S Jean Grant	Not logged in						E
Lee Hogan	Not logged in						
Cathy Hughes	Not logged in						
Barb Hutchinson	Not logged in						
💁 Jay Johnson	Not logged in						
🗟 Kim Lee	Not logged in						
Ed Martinez	Not logged in						
Lou McBeal	Not logged in						
Brian McNulty	Not logged in						
Rajeev Mitra	Not logged in						
Derek Murray	Not logged in						
Lany Peters	Not logged in						
Lou Pizzutti	Not logged in						
Scanlon Scanlon	Not logged in						
<b>A A A A</b>	Mark In						

You can filter the list by:

- Department.
- Telephony status (Active or Available).
- Whether the user is logged in to Infor CRM.

Clicking the Show History button displays the call history for the selected user.

# **Call Statistics Button**

Select this button to display the Call Statistics dialog.

	005					
	m Call Statistics stics provide a summ	ary of telephony activity.		[	Calculate Close	c
Date Range: User Selection:	Start Date/Time: All Users	22/06/2015 00:00	End Date/Time:	22/06/2015 23:59		
	Specific User	Administrator	9			
all Statistics Report						
2						
3						
3						
3	inte	lli-CTi For Infor C	RM - Call Statisti	ics Report		-
-						<u>^</u>
-			RM - Call Statisti Telephony User: A			-
Report Range: 22/06/2018	5 00:00 to 22/06/2015		Telephony User: A	II Users		_
Report Range: 22/06/2016	5 00:00 to 22/06/2015		Telephony User: A			_
Report Range: 22/06/2016	5 00:00 to 22/06/2015		Telephony User: A	all Timings	00:03:15	_
Report Range: 22/06/2018 Call Ra Call Types	5 00:00 to 22/06/2015	23:69	Telephony User: A Call Times	all Timings	00:03:15 00:07:11	_
Report Range: 22/06/2016 Call Ra Call Types Inbound Calls Outbound Calls	5 00:00 to 22/06/2015	23:59	Telephony User: A Ci Call Times Average Call Ler	all Timings		_
Report Range: 22/06/2016 Call Ra Call Types Inbound Calls Outbound Calls	5 00:00 to 22/08/2015 tios	23:59	Telephony User: A Cr Call Times Average Call Ler Average Wrapup	II Users all Timings ngth Time	00:07:11	_
Report Range: 22/06/2011 Call Ra Call Types Inbound Calls Outbound Calls Call Results	5 00:00 to 22/08/2015	23:59 7 8	Telephony User: A Cri Call Times Average Call Le Average Wrapup Total Call Time	II Users all Timings ngth Time	00:07:11 00:48:52	_
Report Range: 22/06/2016 Call Ra Call Types Inbound Calls Outbound Calls Call Results Established Calls (Inbou	5 00:00 to 22/08/2015	23:59 7 8 8	Telephony User: A Cri Call Times Average Call Le Average Wrapup Total Call Time Most Active Call	II Users all Timings ngth Time	00:07:11 00:48:52	_
Report Range: 22/06/2010 Call Ra Call Types Inbound Calls Outbound Calls Call Results Established Calls (Outb Unanawered Calls (Outb	5 00:00 to 22/08/2015	23:59 7 8 8	Telephony User: A Call Times Average Call Lei Average Wrapup Total Call Time Mott Active Call Shortest Call	II Users all Timings ngth Time	00:07:11 00:48:52 Administrator	_
Call Range: 22/06/2015 Call Ra Call Types Inbound Calls Outbound Calls Call Results Established Calls (Inbou Unanswere Calls (Oth Missed Calls (Inbound)	tios Ind/Outbound)	23:59 7 8 8 2 5	Telephony User: A Ci Call Times Average Call Lei Average Virspup Total Call Time Mott Active Call User	II Users all Timings ngth Time	00:07:11 00:48:52 Administrator	_
Call Types Inbound Calls Outbound Calls Call Rosults Established Calls (Inbou Unanswerd Calls (Outb Missed Calls (Inbound) Busy Calls (Outbound)	tios Ind/Outbound)	23:59 7 8 8 2 6 0	Telephony User: A Cri Call Times Average Call Let Average Call Let Most Active Call Shortest Call User Call Duration	II Users all Timings ngth Time	00:07:11 00:48:52 Administrator	-

The top section of the Call Statistics dialog is used to filter the call details in the report:

	m Call Statistics	ary of telephony activity.			Calculate	Close
Date Range:	Start Date/Time:	01/10/2007 00:00	End Date/Time:	01/10/2007 23:59		
User Selection:	<ul> <li>All Users</li> </ul>					
	O Specific User	Administrator	<b>Q</b>			
		-				

- 1. Select the **Start Date/Time** and **End Date/Time** calendar buttons to select the date range for the report.
- 2. Select the All Users radio button for the report to give call information for all users.
- 3. Select the **Specific User** radio button then click the **Find** button to locate the user that you want the report to be based on.
- 4. Click on the Calculate button to display the details based on the selected filter options.

eport Range: 22/06/2015 00:00 to 22/06/2015 23:59		Telephony User: All Users	
Call Ratios		Call Timings	
Call Types		Call Times	
Inbound Calls	7	Average Call Length	00:03:15
Outbound Calls	8	Average Wrapup Time	00:07:11
Call Results		Total Call Time	00:48:52
Established Calls (Inbound/Outbound)	8	Most Active Call Time (User)	Administrator
Unanswered Calls (Outbound)	2	Shortest Call	
Missed Calls (Inbound)	5	User	Administrator
Busy Calls (Outbound)	0	Call Duration	00:00:02
Invalid Numbers (Outbound)	0	Longest Call	
			Administrator
Total Calls	15	Call Duration	00:16:00

5. The report can be printed using the **Print** button above the report.

# intelli-CTi Toolbar and Menu – Infor CRM LAN Client

## **Show Dialer Toolbar Button**



The Show Dialer function is a quick and easy way of managing, selecting and dialing phone numbers for the selected Accounts, Contacts, Leads, Opportunities and Tickets Views.

To open the Dialer dialog, click on the **Show Dialer** button.

	CTI <sup>™</sup> for Infor CRM	
Abbott Ltd.		
All <u>C</u> ontacts	s	Cancel
Account Contact:		
Contact Name	Title	Primary
o o ma o manno		
	President	Yes
John Abbott		Yes Manage Dial
John Abbott		11
John Abbott		11
John Abbott TNS Telephone John Abbott	e Numbers:	Manage Dial
TNS Telephone John Abbott John Abbott Number Type	• Numbers:	Manage Dial
John Abbott TNS Telephone John Abbott Number Type Direct Number	• Numbers:	Manage Dial

The top area of the Dialer dialog lists all contacts/accounts related to the current entity, Accounts, Contacts, Leads, Opportunities and Tickets Views. The bottom section displays all phone numbers for the selected entity.

## **Button Functions**

- Account Displays the account name and phone numbers.
- All Contacts Displays details of all the contacts at the selected account and the phone numbers of the selected contact.
- Cancel Close the Dialer dialog.
- Dial Dials the selected number.
- Manage Opens the Manage Telephone Numbers Window.

## intelli-TNS - Manage Telephone Numbers Window

The Manage TNS Telephone numbers dialog enables additional management of telephone numbers: **Edit Numbers** – Edit, delete or archive listed Account, Contact and Lead numbers.

Captured Numbers - Assign, edit, delete or archive captured numbers.

Archive Numbers - Remove from view and archive selected numbers.

1. To access the Manage Account/Contact Telephone Numbers dialog either:

- Choose Manage Telephone Numbers from the Infor CRM Edit menu.
- Click on the Show Dialer toolbar button and click on the Manage... button.

intelli	TNS: Manage Contact Te	lephone Numbers							×
in	telli-TNS								5
	Telephone Numbers							ОК	Cancel
John	Abbott, Abbott Ltd.								
	Current Telephone Nu	mbers (Available T	ypes)			Captured Numbers			
	Number Type	Number	Extension	Restricted		Number Type	Number	Extension	Restricted
Î	Direct Number	(312) 555-7854		Yes	-	Captured Number	(013) 291-23122		No
Ŷ	Home Number	(312) 555-3543		No					
	Mobile Number	(312) 555-8685		No	$\Leftrightarrow$				
	Contact Fax Number	(312) 555-7545		No			_		
	Pager Number			No		4		Edit	Delete
	Other Number #1			No			_		
						Archived Numbers			
						Number Type	Number	Extension	Restricted
					-				
					$\langle \neg$				
		_							
	Dial		Edit	Delete				[	Delete

#### **Current Telephone Numbers**

2. From the **Current Telephone Numbers** section, click on the required number then the Edit button to edit the number details.

Edit Direct Number (Cor	itact)		×			
intelli-TN	IS		5			
Direct Number	(Contact)	ок	Cancel			
John Abbott, Abbott Lt	d.					
Telephone Number D	efinition	V	Auto Tab			
Country	United States of America	•				
Telephone Number	Country Area Code Main Number Exten	sion				
	Note: Area Code should include all digits (including an	y leading zeros)				
Display Number	(312) 555-7854 📝 Display Ext	tension				
Dialling Options           Include All Elements           include all elements when dialing this telephone number (excluding extension number)           Restricted Telephone Number           This is a restricted telephone number (unsolicted calling/marketing is not permitted)						
Number Recognition	for Recognition none number for caller recognition.		d Call Hits O			

- 3. Select the Auto Tab check box to have the cursor automatically move to the next phone number field when the correct number of digits has been entered in each Telephone Number box. For example, the Area Code for the United States has only 3 digits and will automatically move to the Main Number field when 3 digits have been entered.
- 4. Select the Phone Number **Country**.
- 5. Type in or edit the **Telephone Number** fields. The Country code will automatically be created based on the selected Country.

- 6. Select the **Display Extension** check box to display the extension number with the phone number.
- 7. Select the **Include All Elements** check box if you want the Country, Area Code and Number to be included when dialing this number.
- 8. Select the **Restricted Telephone Number** check box if this number must not be used for unsolicited calls. If you try to dial a restricted number, a warning message is displayed.

intelli-TNS- Restricted Telephone Number					
🚨 intelli-TNS					
Direct Number					
Restricted Telephone Number					
+1 (312) 5557854					
This telephone number is listed as a restricted number. Unsolicited calling/marketing to this number is not permitted.					
Are you sure you wish to continue dialling this number?					
Dial Cancel					

- 9. Select the **Include Number For Recognition** if you want this number to be used to recognize the Contact, account or Lead record on an incoming call.
- 10. Click **OK** when finished.

#### **Captured Numbers**

The Captured Numbers area displays phone numbers from incoming calls where the phone number has not been found in the Infor CRM database, and the user has chosen to capture the number, or the system has been configured to automatically capture numbers.

Captured Numbers			
Number Type	Number	Extension	Restricted
Captured Number	(123) 456-7895		No
	[	Edit	Delete

 To Add the captured call to the listed numbers, select the Captured Number then click on the Current Telephone Numbers (Available types) list detail where the captured number will be stored.

Select the left pointing arrow button to transfer the call details.

intelli	TNS: Manage Contact 1	Telephone Numbers							×
in	telli-TNS								5
TNS	Telephone Numbers							ОК	Cancel
John	Abbott, Abbott Ltd.								
	Current Telephone N	Numbers (Available	Types)			Captured Numbers	\$		
	Number Type	Number	Extension	Restricted		Number Type	/ Number	Extension	Restricted
Î	Direct Number	(312) 555-7854		Yes		Captured Number	(013) 291-23122		No
Ŧ	Home Number	(312) 555-3543		No					
•	Mobile Number	(312) 555-8685		No					
	Contact Fax Number	(312) 555-7545		No					
	Pager Number			No		4 1		Edit	Delete
	Other Number #1			No	I	Archived Numbers			
						Number Type	Number	Extension	Restricted
					<b>•</b>				
	Dial		Edit	Delete	]			(	Delete

The list of Current Telephone Numbers (Available Types) is subject to your Infor CRM customizations.

- 2. To Edit the captured number details, click on the Edit button in the Captured Numbers section.
- 3. To **Archive** the captured number, click on the number then on the down arrow at the bottom of the Captured Numbers section.
- 4. To **Delete** the captured number, click on the number then the **Delete** button.

#### **Archived Numbers**

The Archive Numbers area is used to store phone numbers that are no longer associated with the account, contact or lead. Storing numbers in this manner will allow the number to be restored at a later date.

Restr	Extension	Number	lumber Type
No		(714) 555-2431	Work Number (Archived)
No		(714) 555-2431	/ork Number (Archived)

## Archiving an Existing Telephone Number

To move an existing telephone number to the Archive area, select the telephone number in the Current Telephone Numbers area then click on the right pointing arrow to the side of the Archive area.

-

## **Restoring an Archived Telephone Number**

To restore an Archived telephone number, select the archived number then click on the left pointing arrow to move the telephone number into the Current Telephone Numbers area.

í	
I	- 600
1	-

# intelli-CTi Navbar Button Menu – Infor CRM LAN Client

Additional intelli-CTi options can be accessed from the intelli-CTi Navbar button. To access the Navbar button menu, click the right mouse button on the intelli-CTi Navbar button.



Show intelli-CTi Call Manager
<u>D</u> ial Current Contact D <u>i</u> al Current Account <u>A</u> ssociate Account/Contact To Call
i <u>n</u> telli-CTi Reports
in <u>t</u> elli-CTi System Settings

**Show intelli-CTi Manager** – Open the Telephony Call Manager where user activity and historical calls can be managed.

For further information, see the Telephony Call Manager section on page 43

**Dial Current Contact...** – This option will display the intelli-CTi for Infor CRM Dialer window, enabling the user to dial any of the telephone numbers for the Contact that relates to the currently displayed entity.

**Dial Current Account...** – This option will display the intelli-CTi for Infor CRM Dialer window, enabling you to dial any of the telephone numbers for the Account that relates to the currently displayed entity

Associate Account/Contact To Call – This option will associate the current Account and Contact to the active telephone call.

**intelli-CTi Reports –** This option displays a list of available intelli-CTi reports. If none have been created, the list will be blank.

intelli-CTi System Settings... - Opens the intelli-CTi System Administration dialog.

# intelli-CTi System Settings

## **System Administration**

This section outlines the Administration of your intelli-CTi for Infor CRM application.

This enables the Infor CRM Administrator to change the intelli-CTi for Infor CRM systems settings and preferences for:

- The intelli-CTi Site
- intelli-CTi User/Team Profiles (preferences)

To access the intelli-CTi System Settings, click the right mouse button on the intelli-CTi Navbar button and select **intelli-CTi System Settings**...

## intelli-CTi Users Tab

The number of users in Infor CRM that can use the intelli-CTi application is dependent on the number of licenses purchased.

The intelli-CTi Users tab enables the Infor CRM administrator to distribute these licenses to the appropriate staff wanting to have access to intelli-CTi.

🔊 intel	li-CTi <sup>™</sup> for Infor	CRM			
ystem Managemer	nt				
ntelli-CTi Users Site/	User Profiles DDI Profiles	ovstem Settings Telephone N	umbers Licence		Close
intelli-CTi L Infor CRM us	Jsers sers with access to intelli⊧CTi.				
intelli-CTi User	/ Title	Department	User Type	*	
Barb Hutchinson	Inside Sales Representat	Inside Sales	Concurrent		
Brian McNulty	Director Global Marketing	Marketing	Concurrent		
Cathy Hughes	Northwest Sales	Field Sales	Concurrent		
Dan Barret	Northeast Sales	Field Sales	Concurrent		
Derek Murray	UK Sales	Field Sales	Concurrent	Ξ	
Ed Martinez	South west & Latin Ameri	Field Sales	Concurrent		
Georgine Ekels	Australia Sales	Sales	Concurrent		
Hans Stichler	Germany Sales	Field Sales	Concurrent		
Jay Johnson	Defects Manager	Development	Concurrent		
Jean Grant	Manager of Sales, EMEA	Sales	Concurrent		
Joan Curbough	Customer Service Repre	Tech Support	Concurrent		
John Smith	Administrative Assistant	Sales	Concurrent		
Ken Dryden	Manager of Sales, Asia/F	Sales	Concurrent		
Kim Lee	Singapore Sales	Field Sales	Concurrent		
Larry Peters	Marketing	Marketing	Concurrent		
Lee Hogan	Midwest Sales Executive	Field Sales	Named		
Linda Walsh	Southeast Sales	Field Sales	Concurrent	*	
			Manage Users		

#### Managing Users

1. To manage the licensed users, click on the intelli-CTi Users tab.

The intelli-CTi Users tab lists Infor CRM users with access to intelli-CTi.

2. Click on the **Manage Users...** button.

intelli-CTi for Infor CRM - Manage intelli-CTi Users				
intelli-CTi for In	for CRM			
intelli-CTi - User Access Select the Infor CRM users wit	n access to intelli-CTI.	OK Cancel		
Available Infor CRM Users (All Departments) - Bart Mutchinson Bran Michuty Cathy Hughes Customer Portal Tom Scanion	Named intell-CTI Users:         11 of 20           Dan Barret Dans Kurray         Edi Martinez           Georgine Exis Hans Stichler         Jay. Johnson Jean Crant Lee Hogan Robert Cromack			
	Samanha Brnk Concurrent Intel-CTI Users John Smith Km. Le Lany Yeters Lany Yeters Lany Wethal Lou Pizzult Multi-Veters Pan Schwartz Rager Mina			
You are licensed for 20 n	amed users and 5 concurrent users			

3. The left hand column displays Available Infor CRM Users.

This list will display all licensed Infor CRM users that are not currently licensed intelli-CTi users. This list can be filtered by clicking on the departments dropdown box and selecting the appropriate department.

- 4. The top right hand section lists all named intelli-CTi users and displays the number of **Available/Used** licenses.
- 5. The bottom right section displays a list of intelli-CTi concurrent users.

When you purchase licenses for intelli-CTi, you can purchase a number of Named User licenses and a number of Concurrent User licenses.

A named user is always allowed to use intelli-CTi. A concurrent user can only log in and use intelli-CTi if one of the concurrent licenses is still available. Concurrent licenses are allocated to users as they log in to Infor CRM on a "first come" basis.

<	>
<<	>>

- 6. Use the right and left pointing chevrons to move users in and out of the relevant sections.
- 7. User the left and right double chevron button to move all available users in and out of the relevant sections.
- 8. Click OK when finished to Save and Close.

## **Site/User Profiles Tab**

#### intelli-CTi Site Profiles

Site Profiles contain the telephony settings relating to a particular telephone system in a given location.

Additional Site Profiles may be created for each location and/or telephone system requiring different profile definitions.

For example, if you have Infor CRM users in both the UK and USA, due to different working practises, you will probably want a different profile for each country.

## intelli-CTi User Profiles

User Profiles contain CTI configuration settings and user preferences for a particular Infor CRM User, Team or Infor CRM system.

	for CRM - System Administration			<b>—</b> ×
🄊 int	elli-CTi <sup>™</sup> for Infor	CRM		
System Manaç	gement			
intelli-CTi Users	Site/User Profiles DDI Profiles St	ystem Settings   Telephone Nu	mbers Licence	Close
	li-CTi Site Profiles Profiles define the telephony settings a	ind behaviour for a given Infor	CRM site.	
Site Name		Site Country		
Default Site		United Kingdom		
User/ Type	li-CTi User/Team Profiles Team Profiles define the telephony se Profile Name	Site Name	Role	
Type System	Team Profiles define the telephony se Profile Name Default System Profile	Site Name Default Site	Role User	
Type System Team	Team Profiles define the telephony se Profile Name Default System Profile Global	Site Name Default Site Default Site	Role User User	
Type System Team Team	Team Profiles define the telephony se Profile Name Default System Profile Global Southwest	Site Name Default Site Default Site Default Site Default Site	Role User User User	
Type System Team	Team Profiles define the telephony se Profile Name Default System Profile Global	Site Name Default Site Default Site	Role User User	
Type System Team User	Team Profiles define the telephony se Profile Name Default System Profile Global Southwest Grant, Jean	Site Name Default Site Default Site Default Site Default Site Default Site Default Site	Role User User User User	

#### **Scenario**

The current default profile has been setup for all users in the USA. You have been asked to setup a profile for the EMEA user team who are based in the UK.

## **Step by Step**

 From the System Administration dialog, Site/User Profiles tab click on the intelli-CTi Site Profiles > Add... button.

intelli-CTI <sup>™</sup> for Infor CRM Site Management General Dialing Support Call Logging/Tracking OK
General Dialing Support Call Logging/Tracking OK
Site Profile Information Site Profiles define information and telephony behaviour specific to a given location. Specify a descriptive name and country for your intelli-CTVInfor CRM site location.
Site Name: EMEA
Site Country Location: United Kingdom ***

2. From the General tab type a Site Name.

This is a descriptive name you wish to name the site this profile relates to.

3. Click on the Site Country Location dropdown button and select the country location for this site.

The Site Country Location is the name of the country this Site relates to. This information is used to control worldwide considerations and terminology.

4. Click on the **Dialing Support** tab.

Insert New intelli-CTi - Site Profiles	<b>—</b> ×-
intelli-CTi <sup>™</sup> for Infor CRM	
Site Management	
General Dialling Support Call Logging/Tracking	ОК
International Dialling Support These settings define how intelli-CTi dials telephone numbers from this site.	Cancel
Enable International Dialling on Dialler window by default	
International Dialling Prefix Character +	

International Dialing Support information denotes international dialing settings for this site.

- 5. Click on the **Enable International Dialing Support** to turn on or off the international dialing functions.
- 6. The Enable International Dialing on Dialer window by default checkbox is for use in a future release of intelli-CTi for Infor CRM.
- 7. The **International Dialing Prefix Character** denotes the character to be prefixed to a country code when dialing internationally.
- 8. Click on the Call Logging/Tracking tab.



9. From the User Call History Retention area, click on the User Call History Retention Period and select the time period that you would want the call history to be retained.

User call history is regularly and automatically checked to make sure that it does not exceed the retention period. Only reduce the retention period if you are certain that you would like older records to be deleted.

 Select the Track CLI Numbers check box to have intelli-CTi count the number of incoming calls associated to each number.

Warning, this option may impact performance on large volume databases.

11. Click OK.

#### **Scenario**

You now need to add the users profile to this site.

#### **Step by Step**

1. From the System Administration - Site/Users Profiles tab, click on the **intelli-CTi User/Team Profiles > Add...** button.

S Owner Assignment	- • •
Users Teams System	ОК
My Teams	Cancel
Asia/Pac EMEA Global	Help
Midwest Northeast Northwest	
Paribus Hidden Item Paribus Quarantine Item Southeast	
Southwest Tech Support - Hardware	
Tech Support - Software	

- 2. From the Infor CRM Owner Assignment dialog, click on the Teams tab and select the EMEA team.
- 3. Click OK.
- 4. Click on the User/Team button to select the required user or team.

#### User/Team Profiles - General Tab

Edit intelli-CTi - User/Team Profile Information	<b>—</b> ×
intelli-CTi <sup>™</sup> for Infor CRM	
🔯 [Team] - Global	User/Team
General Location Call Notifications Call Wrapup Call History Security	QK
General Settings Various settings for this User/Team Profile.	Cancel
Auto Start/Stop intelli-CTi	
V Auto Start intelli-CTi Automatically start intelli-CTi when Infor CRM Starts.	
☑ Auto Stop Intelli-CTI Automatically stop intelli-CTI when infor CRM is closed.	
Telephone Number Capture	
Capture new telephone numbers for Contacts during incoming calls, based upon their calling line ID (CLI) information.	
Capture Mode: Automatic ****	
(Note: This feature requires inteli-TNS to be enabled)	

- 5. From the User/Team Profile dialog click on the General tab.
- 6. Select the Auto Start intelli-CTi checkbox to have intelli-CTi automatically start when Infor CRM is opened.
- Select the Auto Stop intelli-CTi checkbox to have intelli-CTi automatically stop when Infor CRM is closed.
- Click on the Telephone Number Capture Capture Mode dropdown button and select the required entry.

If an incoming caller's number is not recognised, a Contact can be manually found using the **Find Contact** button on the Call Associate window. Once the call has finished and been wrapped up, the **Capture Mode** defines what action occurs:

- Disabled No action is taken
- Manually Qualify The Capture New Telephone Number window is displayed. See page 23.

- Automatic The number is stored as a Captured Number for the contact. To find out how to deal with Captured Numbers, see intelli-TNS - Manage Telephone Numbers Window on page 50.
- 9. Click on the **Location** tab.

User/Team Profiles - Location Tab

Edit intelli-CTi - User/Team Profile Information	×
intelli-CTi <sup>™</sup> for Infor CRM	
Team] - Global	<u>U</u> ser/Team
General Location Call Notifications Call Wrapup Call History Security	<u>о</u> к
Profile Location Associate this User/Team Profile to an intelli-CTI Site Location.	Cancel
Select the Site location for this CTI User/Team	
Site Profile Default Site	

- 1. Select the Site Profile for this User Profile, EMEA.
- 2. Click on the Call Notifications tab.

User/Team Profiles – Call Notifications Tab

Edit intelli-CTi - User/Team Profile Information	<b>×</b>
intelli-CTi <sup>™</sup> for Infor CRM	
Team) - Global	User/Team
General Location Call Notifications Call Wrapup Call History Security	ОК
Call Notifications Define actions/behaviour when an incoming telephone call is received.	Cancel
Enable Screen-Popping	
Select this option to enable Screen-Popping (the presenting of a call notification window during an incoming call).	
Screen-Pop Internal Calls Select this option to enable Screen-Popping of internal calls.	
Show Selected Entity Next action after closing screen-pop window	
When a Contact/Account has been selected, this action will be performed.	
Run Processes on Incoming Calls Select the doption January Calls     Select the doption ta unformatical tyrue contact or processes     once an incoming call has been associated to an infer CRM Contact.     Run DOI Processes only     Select this option to run contact processes only for incoming     calls to numbers that are in the intelle-TDO for professist	
Call Notification/Association Window Specify the hfor CRM window you wish to use to notify of an incoming call and associate the call to an Infor CRM Account/Contact.	
Call Notification Window: Intelli-CTr.Call Associate (Standard)	

- 1. Click on the **Enable Screen-Popping** check box to enable a screen popping notification to appear during an incoming and outgoing call.
- 2. Click on the **Screen-Pop Internal Calls** check box to enable screen-pop notifications to appear when internal calls are received.
- 3. On the **Next action after closing screen-pop window** box, click on the ellipsis button and select the required action.

#### Nothing - Do Nothing.

Show Selected Entity - Open the Account, Contact, etc record.

Show Call Manager - Opens the Telephony Call Manager.

- 4. The **Run Process on incoming call** checkbox is for use in a future release of intelli-CTi for Infor CRM. It must be checked on if you wish to enable the **Run DDI Processes Only** checkbox.
- 5. Select the **Run DDI Processes Only** checkbox to run a Contact Process only for incoming calls to numbers that are in the intelli-CTi Profiles list.

6. Select the required Notification window from the drop down box.

If your system has not been customised, then there will be only one entry in this list.

7. Click on the Call Wrapup tab.

User/Team Profiles – Call Wrapup Tab	User/Team	Profiles -	Call	Wrapup	Tab
--------------------------------------	-----------	------------	------	--------	-----

Edit intelli-CTi - User/Team Profi	le Information		×
intelli-CTi <sup>™</sup> fo	Infor CRM		
🔯 [Team] - Global			User/Team
General Location Call Notificati	ons Call Wrapup Call History	Security	<u>о</u> к
Call Wrapup Define actions/behaviour	when a telephone call is complet	ed.	Cancel
Enable Call Wrapup Select this option to e	nable call Wrapup (display an act	ion form on completion of a call).	
Wrapup Establishe Only show the call W	d Calls Only rapup window for established te	lephone calls only.	
Auto Close Wrapup Automatically close th	Window e Wrapup window after a single	action has been completed.	
Enable Call Reassig Enable the user to re-	nment define the call association during	the call Wrapup.	
Include Call Statisti Automatically include	cs call statistics within the notes or	an Activity/History item.	
Control Agent State Automatically change	is the Agent status to 'In Wrapup' d	uring call Wrapup.	
Call Wrapup Window Specify the Infor CRM	window you wish to use to perfo	rm the call wrapup process.	
Call Wrapup Window:	intelli-CTr.Call WrapUp (Standar	d) 🗸	
Include Detail Tabs:	Activity Management	Opportunities	
	Campaigns/Lead Sources	Support Tickets	
L			

- 1. Click on the **Enable Call Wrapup** checkbox to have the Call Wrapup dialog display when a call has been completed/disconnected.
- 2. Select the **Wrapup Established Calls Only** checkbox for the wrapup window to only appear for calls that were established (connected).
- 3. Select the **Auto Close Wrapup Window** checkbox to have the Wrapup window automatically close after a single operation has been completed. I.e. If you click on one of the action buttons on the wrapup form, when the action is finished, the wrapup form will close instead of waiting for the **Complete** button to be pressed.
- 4. Select the **Enable Call Reassignment** checkbox to allow the user to reassign the call during the Call Wrapup. This enables the Reassign button on the Call Wrapup screen.
- 5. Select the **Include Call Statistics** checkbox to have activity or history items created during Wrapup automatically contain call statistics from the last call.
- 6. Select the **Control Agent Status** check box to automatically change the Agent status to "In Wrapup" during the Call Wrapup session.
- 7. Select the required **Call Wrapup Window** to be displayed during Call Wrapup from the dropdown list.

If your system has not been customised, then there will be only one entry in this list.

- 8. Select the Include Detail Tabs to be available on the Call Wrapup.
- 9. Click on the Call History tab.

## User/Team Profiles - Call History Tab



- 1. Click on the **Log User Call History** check box to have all external calls logged in the User Call History (As displayed in the My Call History tab of the intelli-CTi Call Manager. See page 44).
- 2. Click on the Log Internal Calls check box to include internal calls in the User Call History.
- Click on the Log Account/Contact Call History check box to enable logging of calls that relate to Accounts, Contacts and Leads (As displayed in the intelli-CTi Call History tab in the Account, Contact or Lead window).

This will only record calls that have been linked to an Account, Contact or Lead. For a log of all calls, see the Log User Call History checkbox.

- 4. Click on the Log Established Calls Only check box to have only established calls included in the Account/Contact Call History.
- 5. From the **Account Contact Call History Synchronisation** list, select how you would like Account/Contact call history to be synchronised to remote users.
- 6. Select the Automatically Create Infor CRM History checkbox to have the Account/Contact call history also be automatically logged into the Infor CRM Notes/History tab.
- 7. Click on the Security tab.

User/Team Profiles – Security Tab

Edit intelli-CTi - User/Team Profile Information	×
Team] - Global	User/Team
General Location Call Notifications Call Wrapup Call History Security	<u>o</u> k
intelli-CTi User/Team Security Define this User/Team's security level.	Cancel
User/Team Profile Security Level Define the security level and access control required for this User or Team.	
User/Team Role: User 👻	
Role Description: User cannot change any intelli-CTI settings.	

- Click on the User Team Role dropdown button and select whether the users in this profile have authority to change intelli-CTi settings. Team profiles can only be given a role of User. To assign an administrative role, you must be working with a User profile.
- 2. Click OK.

## **DDI Profiles Tab**

intelli-CTi for Infor CRM provides an ability to define a DDI number (the number a caller is calling into), and associate certain attributes and actions to that number.

Each DDI profile has a relating text phrase, which will automatically appear in the intelli-CTi call notification display, providing users with a quick indication of the caller's likely requirement or interest.

A DDI profile can be associated to an Infor CRM process, so when an incoming call is received and the DDI number identified, automatically have Infor CRM begin the process.

A DDI profile can be also be associated to an Infor CRM campaign, so when an incoming call is received and the DDI number identified, associate the campaign for later use by the **End of Call (Wrapup)** window.

### To Add DDI Profiles

- 1. From the intelli-CTi Navbar button, click the right mouse button and select intelli-CTi System Settings...
- 2. Click on the **DDI Profiles** tab.

intelli-CTi for Infor CRM - System Administration	X
<b>□</b> intelli-CTi <sup>™</sup> for Infor CRM	
System Management	
intelli-CTi Users Ste/User Profiles DDI Profiles System Settings Telephone Numbers Licence	Close
DOI Profiles define telephony behaviour relating to a specific DOI telephone number:	
DDI Number Regarding (LCD Text) Hits Active Campaign Name Lead Source Name	me
Add Edit	Delete

3. Click on the Add... button.

	elli-CTi DDI Profiles I Profiles define telephony behaviour relating to a specific DDI telephone number.	
	ne Number: 01234777888 Active Profile	OK
General	Campaigns/Lead Sources Processes	
	Humber relating to new product launch advert appearing in the new spaper and email to prospects list.	

- In the DDI Telephone Number type the DDI number. Important Note!: This should be a single continuous number, without any formatting or spaces.
- 5. Click on the **Active Range** check-box to enable this entry. The entry can be enabled and disabled whenever appropriate. When set to inactive, this range will not be used during an incoming call.

- The Regarding (LCD Text) field is used to specify a short text description for the DDI profile. This short description will appear on the intelli-CTi call notification display during an incoming call.
- 7. The **Description** field provides the means of attributing a description for administrative purposes.
- 8. Click the **Track Calls Received** checkbox to have intelli-CTi count the number of calls received on this number.

Click on the Reset button to zero the count.

9. Click on the Campaign/Lead Source tab.

General	Campaigns/Lead Sources	Processes
7	Related Campaign	
	Specify (optionally) a rela	ted Campaign to associate to this DDI telephone number.
	Campaign Name:	Forbes.com Banner Campaign
	Default Lead Source:	Advertising - Web Banner Ads 🔹
		e Campaign Response a Campaign response for Contacts calling this DDI telephone number.
<b>&gt;</b>	Related Contact L	ead Source
U	Specify (optionally) a rela	ted Contact Lead Source you would like to associate to this DDI telephone number.
	Contact Lead Source:	(None) v
		e Contact Lead Source a Contact Lead Source for Contacts calling this DDI telephone number.

- Click on the Related Campaign radio button to have the DDI number associated to the selected campaign. This campaign information is used within the End of Call (Wrapup) window at the end of the call.
- 11. Select the related Campaign Name.
- 12. Select a Default Lead Source if applicable.
- 13. Click on the **Automatically Create Campaign Response** checkbox if a response is to be automatically associated when a call is received on the DDI number.
- 14. Click on the **Related Contact Lead Source** radio button if no Related Campaign option is selected but you want to associate a Lead Source when a call is received on the DDI number.
- 15. Click on the Automatically Create Campaign Lead Source checkbox if a lead source is to be automatically associated when a call is received on the DDI number.

General	Campaigns/Lead Sources	Processes
0,	Related Infor CRM P Specify (optionally) a rei this DDI telephone numb	ated Infor CRM Process that you would like to instigate when
	Process Family:Name	Follow-up:Quarterly Contact

- 16. Click on the **Process** tab.
- The Process tab enables the user to Assign a Contact Process to the contact record of the caller making this call to the DDI Number.

The Contact Process will be a pre-defined Infor CRM Contact Process.

18. Click **OK**.

# **System Settings Tab**



If you have integrated your own customisations within intelli-CTi, the **Enable Custom Actions/Events** will turn on/off these customisations.

If you are experiencing problems running your application, you can turn on/off your actions/events to help you establish if the fault lies with intelli-CTi or your own customisation.

## **Telephone Numbers Tab**

intelli-CTi provides a complete management of telephone numbers for use with computer telephony integration, providing management and discipline on telephone number capture for outbound dialer and a repository of telephone numbers for effective inbound caller recognition.

This management facility is known as intelli-TNS (Telephone Number Support)

The Telephone Number tab gives access to your intelli-TNS settings.

intelli-CTi for Infor CRM - System Administration	×
intelli-CTi <sup>™</sup> for Infor CRM	
System Management	
Intell-CTI Users Ste/User Profiles DDI Profiles System Settings Telephone Numbers Licence	Close
intelli-CTi Telephone Number Support     Settings relating to intelli-CTi Telephone Number Support (intelli-TNS).	
inteli-CTI provides a complete management of telephone numbers for use with computer telephony integration, providing management and discipline on telephone number capture for outbound dailer and a repository of telephone numbers for affective inbound caler recognition.	
intelli-CTi number management facility is known as intelli-TNS (Telephone Number Support)	
intelli-TNS System Settings	
Before using intell-CTi we highly recommend configuring your intell-TNS settings.	
Configuration of Intell-TNS includes: - Defining Intell-TNS system settings - Defining Intell-TNS county definitions - Migration of existing Infor CRM telephone numbers	
To confgure your intell-TNS system settings, click the button below.	
intell-TNS Settings	

To access the Telephone Numbers tab:

- 1. From the intelli-CTi Navbar button, click the right mouse button and select intelli-CTi System Settings...
- 2. Click on the Telephone Numbers tab.
- 3. Click on the intelli-TNS Settings... button.

Manage intelli-TNS System Settings
intelli-TNS 🛛 🖏
Telephone Number Support Close Cancel
About Intell-TNS TNS System Settings TNS Number Settings TNS Country Settings Number Migration
About Intelli-TNS Outline of the features of intelli-TNS
Intell-THS is an addition to Infor CRM providing extended telephone number management in support of telephony integration with intelli-CTI for Infor CRM.
intell-TNS seamlessly manages the capturing of telephone numbers for Accounts and Contacts whilst ensuring each telephone number is correctly formatted for the country of origin.
Intel®17165 Interbone numbers are used for both outbound and howout freiphone calls, ensuring: - thoour flexiphone calls are accurately andhed with hitter (EUK Accounds and Contacts, - Outbound telephone calls dial the correct telephone number sequence, including international dialing rules.
Important Considerations
Before using intell-TNS, we strongly advise you to review the following intell-TNS settings: - intell-TNS Default Country (TNS System Settings tab): This defines the default country appropriate to your installation, used to determine telephone number formatis Where country information is missing from an Account/Contact address.
<ul> <li>- intell-TNS Country Definitions (TNS Country Settings tab): This defines the desired telephone number formatting for telephone numbers around the World.</li> </ul>

You can also access this screen from the Tools => Manage => intelli-TNS System Settings menu.

4. Click on the TNS System Settings tab.

## **TNS System Settings Tab**

Manage intelli-TNS System Settings
intelli-TNS 🛛 🖏
Telephone Number Support Close Cancel
About intelli-TNS TNS System Settings TNS Number Settings TNS Country Settings Number Migration
TNS System Settings Define the system settings and behaviour for intell-TNS.
intelli-TNS System Status
V intelli-TNS Enabled Select this option to enable intelli-TNS.
Important Note: If you are enabling intelli-TNS for the first time, it is strongly recommended that you migrate the telephone numbers of your existing infor CRM Accounts and Contacts.
See the 'Number Management' Tab for migration options.
intelli-TNS Default Country
Many operations of intell-TNS are based upon country location settings. Please specify a default country for intell-TNS to use for Accounts and Contact that do not have a country defined within their address.
Default Country USA -
Country ISO Code USA

1. Click on the intelli-TNS Enabled checkbox to enable the management of your telephone numbers.

If you are enabling intelli-TNS for the first time, it is strongly recommended that you consult the intelli-CTi for Infor CRM Getting Started Guide for details of how to migrate your existing telephone numbers into intelli-TNS.

2. Select a **Default Country** from the dropdown box. This country will be used if an Account or Contact does not specify a county in its address details.

The Country ISO Code field will be automatically populated from the country selected.

3. Click on the TNS Number Settings tab.

ntelli-i	TNS							5
elephone Numbe							Close	Cancel
bout intelli-TNS T	NS System Settings TN	IS Number Setting	ps TNS C	Country Settings	Number Mi	gration		
	er Settings number settings and beh	aviour of intelli-TN	IS number	management.				
Telephone Nu	mber Management			TNS Telepho	ine Numb	er Fields		
When an Acc	ephone Number Char ount telephone number is	changed, select			ction requir	ed when a user		double-click
method to cas same telephor	scade this change to Acc ne number.	ount Contacts wi	th the	action on a Action:	TNS telepho	ine number field.		
Cascade Acti	on: Prompt User for C	ascade Action		TNS Field I				
	mber Descriptions			Select the a	ction requir	ed when a user at to a TNS telep		
	s below to define the des telephone number type (			Action:	Dial Num	per	-	•
Account Te	lephone Numbers							
Number Type Main Alternate	Main Number	Form Label Main: Alternative:		TNS Field I TNS numbe numbers ba	r fields highl	ight (with colour	r) certain te	lephone
Toll Free 1	Toll Free Number #1	Toll Free:	-	Examples				
				Restricted N	lumbers	(555) 332211	<b>S</b>	Change
Contact Tel	ephone Numbers			Invalid Num		() 222801		Change
Number Type	Number Description	Form Label	*	Invalid Num	bers	() 222001	2	Change
Direct	Direct Number	Direct						
Home	Home Number	Home:						
	Mobile Number	Mobile:	-					

## TNS Number Settings Tab

#### **Telephone Number Management**

If you change an Account Telephone number in Infor CRM, you are asked if you want all contacts using the same number to be updated, i.e. cascade the change. You can change how intelli-CTi cascades the changes using the **Cascade Action** picklist.

#### **Telephone Number Descriptions**

You can change the description that appears next to telephone numbers when they are displayed on forms. For example, by default the main number for an account is called **Main Number**, but your organisation might refer to this a **Switchboard Number**.

The **Form Label** is used on the Account and Contact detail forms. The **Number Description** is used on other intelli-TNS forms such as the Manage Telephone Numbers form.

The number descriptions are edited directly within the grid by clicking on them and typing the new description.

## **TNS Telephone Number Fields**

The TNS Telephone Number Fields area controls the behaviour of the telephone number fields in Infor CRM.

Main:	(312) 555-7678	2
Alternate:	(800) 555-1235	2
Fax:	(312) 555-7545	

TNS Field Double-click Action:

Select the action required when the user double clicks on a telephone field in Infor CRM.

- Dial Number Dials the selected Telephone number.
- Edit Number Opens the Edit Number dialog.

care pricer rearriber (co	ntact)		- <del>X</del>
intelli-TN	٧S		5
Direct Number		ок	Cancel
John Abbott, Abbott L	td.		
Telephone Number [	Definition	V	Auto Tab
Country	United States of America	•	
Telephone Number	Country Area Code Main Number 1 (312) 5557854 Note: Area Code should include all digits (includ	Extension	1
Display Number	(312) 555-7854 V Disp	ay Extension	
Dialling Options	nents		

intelli-TNS: Mai age Contact Telephone Numbers X 6 intelli-TNS Cancel tt, Abbott Lto Restricted er Type Number Numbe tricted (312) 555-7854 1 J (013) 291-2312 Direct Number Yes -Captured Nurr No (312) 555-3543 (312) 555-8685 me Numbe No Mobile Number No Contact Fax Numbe (312) 555-7545 No ł Edit Pager Number No Delete Other Number #1 No Number Extension Restricted er Type • Dial Edit Delete Delete

Manage Numbers – Opens the Manage Account/Contact Telephone Numbers dialog.

TNS Field Button-Click Action:

Select the action required when the user clicks on a telephone field button in Infor CRM.



- Dial Number Dials the selected telephone number.
- Edit Number Opens the Edit Number dialog.

• Manage Numbers – Opens the Manage Account/Contact Telephone Numbers dialog.

TNS Field Highlighting:

The telephone number field can be highlighted in colour based on the number contents.

If the number is a **Restricted Number** then click on the **Change...** button and select the required highlight colour.

If the number is an **Invalid Number** then click on the **Change...** button and select the required highlight colour.

#### TNS Country Settings Tab

intelli-TNS provides number management and international dialing support for accounts and contacts across multiple countries.

Manage intelli-TNS System Settings
intelli-TNS 🛛 🖉
Telephone Number Support Close Cancel
About intelli-TNS TNS System Settings TNS Number Settings TNS Country Settings Number Migration
ThS International Country Settings     ThS Country settings define number settings and international dial behaviour for specific countries.
intelli-TNS International Country Support
intelli-TNS provides telephone number management for all telephone numbers, across a defined list of international countries.
With telephone numbers in your Infor CRM database potentially containing Accounts and Contacts from various international countries, intelli-TNS ensures that each telephone number is correctly recorded and formatted for the related country.
intell-TNS country support defines how telephone numbers are stored and displayed, allowing each country to define a unique number display format if required.
intell-TNS country support also ensures that each telephone number can be auto-dialled via CTI (Computer Telephony Integration) regardless of its origin and destination (i.e. dial anywhere from anywhere).
To define intell-TNS Countries, select the button below.
Manage Countries

1. To manage the country settings click on the Manage Countries... button.

intelli-TNS	_					
TNS International Country Settings						
Country Name /	*	Country Settings				
Sudan						
Suriname		Country Definition Settings				
Svalbard and Jan Mayen Islands						
Swaziand		Official Country Name	United State	s of America		
Sweden		Related Infor CRM Country	USA			
Switzerland			-			
Syrian Arab Republic		Country ISO Code	USA			
Tajkistan						
Relend		Telephone Number Manage	ment			
The former Yugoslav Republic of Macedonia		Country Dialling Code				
Timor-Leste		Enter the telephone dialing of	ode for this co	lunbry:	1	
Togo		Area Code Length				
Tokelau		Enter the exact or longest Ar	es Code numb	er length for this country:	3	
Tonga		Main Number Length				
Trinidad and Tobago			ha main talanh	one number for this country:	10	
Tunisia		Crist ore manufactor angel or i	ing singers consiger	one names is the country.		
Turkey		Telephone Number Form	atting (Option	nal)		
Turkmenistan		Enter the format of the telepi	ione number fi	or this country. Use % characters	to to indicate nur	ibers.
Turks and Calcos Islands		Brackets Area Code	Separator	Main Number		
Tuvalu		( • XXX	Space -	X00X-X000X		
Uganda						
Ukraine		Display Country Code		Example: (012) 012		
United Arab Emirates	ini.	Should the country code	be displayed t	for this country's telephone number	N'S.	
United Kingdom of Great Britain and Northern Ireland				ontact Example: (012) 012		
United Republic of Tanzania	11	Should the country code	be recorded in	the infor CRM Account/Contact to	elephone number	fields.
United States Virgin Islands	12	Include Country Code				
United States of America		Should the country code	be used when	n performing caller recognition of t	elephone number	9.
Uruguay						

- 2. Click on the required country in the **Country Name** column.
- 3. Type the Official Country Name.
- 4. Select the Related Infor CRM Country.

The Country ISO Code will automatically be set to the selected country.

- 5. Enter the **Country Dialing Code** for this country.
- 6. Enter the exact or longest area code number length for this country in the Area Code Length box.
- 7. Enter the minimum length of the main telephone number for this country in the **Main Number** Length box.
- 8. Enter the format of the telephone number for this country in the **Telephone Number Formatting** (Optional) box.

Use the 'X' characters to denote number placement.

- 9. If you require the country code to be displayed with the telephone number, check the **Display Country Code** check box.
- intelli-TNS stores a copy of each telephone number in the standard Infor CRM Account/Contact table. If you want these numbers to include the Country code, then check the Record Country Code in Account Contact checkbox.
- 11. Click **OK** when finished.

## Number Migration Tab

The number migration tab is used when you initially set up intelli-CTi for Infor CRM. For information regarding number migration, please consult the intelli-CTi for Infor CRM Getting Started Guide.

## **Licence Tab**

The licence tab area is used to manage your intelli-CTi licences.

telli-CTi for Infor CRM -	System Administrati	on				×
璚 intelli <sup>.</sup>	-CTi <sup>™</sup> for Inf	or CRM				
System Management						
intelli-CTi Users Site/Use	r Profiles DDI Profiles	System Settings	Telephone Numbers	Licence		Close
	nfor CRM Licence De or Infor CRM licence co		itelli-CTi features.			
Infor CRM Database Cu	stomerID: ABC123	456789				
Important Notes:						
<ul> <li>Your intelli-CTi for Info</li> <li>Your Infor CRM product</li> </ul>						
Licensee Name	Named Users	Concurrent Liners	CRM Customer ID	CPM Verrise	licence I	
Demo Company	20	5	Evaluation	8	ABC1234	
•					F	
			Add	Validate	License	

- 1. To add new licences click on the **Add...** button and locate the .lic licence file forwarded with your purchase of additional licences.
- 2. Click on the Validate License button to apply the new license.
- 3. Click on the **Close** button to close and save the System Administration settings.

# intelli-CTi – Technical Support

In the interest of providing customers with the latest product support information, QGate provides the following online resources within our QGate KnowledgeBase website:

## **General Support**

For general technical support information, please visit the main product support page:

www.QGate.co.uk/knowledge/intelli-cti/

#### Troubleshooting

For troubleshooting common problems and scenarios relating to intelli-CTi for Infor CRM, please visit the troubleshooting page:

www.QGate.co.uk/knowledge/intelli-cti/troubleshooting-inforcrm/

#### System Requirements

For information regarding the minimum system requirements for installing and running intelli-CTi for Infor CRM, please visit the product system requirements page:

www.QGate.co.uk/knowledge/intelli-cti/sysreqs/

#### **Product Information**

For more information about intelli-CTi for Infor CRM or other products from QGate Software, see one of the QGate web sites:

EMEA: <u>www.QGate.co.uk</u>

Americas: <u>www.QGateSoftware.com</u>

#### **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 Infor 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 Infor CRM products and other applications, please contact your intelli-CTi software supplier.