intelli-CTi™
for Infor CRM

**Version 3.5**

# Infor CRM LAN Client User/Administrator Guide

Document Version 1.4

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# Notices

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# Table of Contents





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

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



## 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 (screen-pop).
- 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.

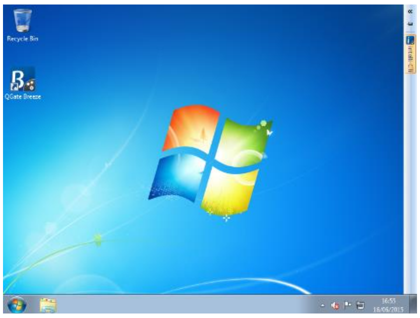


*Figure 1 – Breeze sidebar collapsed*

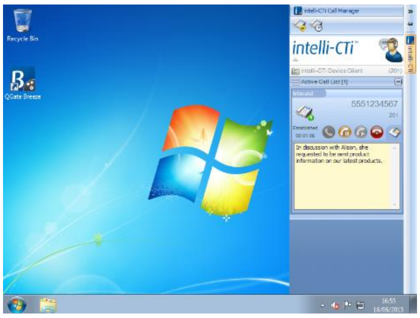


*Figure 2 – Breeze sidebar expanded*

**intelli-CTi running within QGate Breeze**

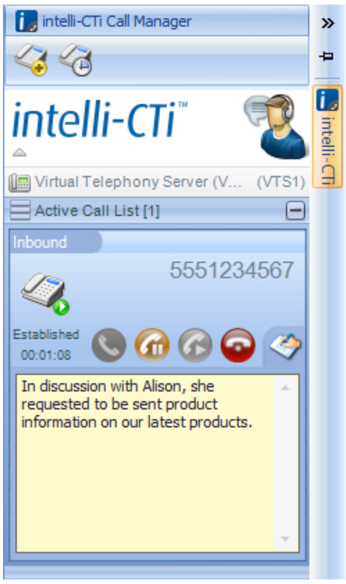



*Figure 3 - intelli-CTi in Breeze*

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 is 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

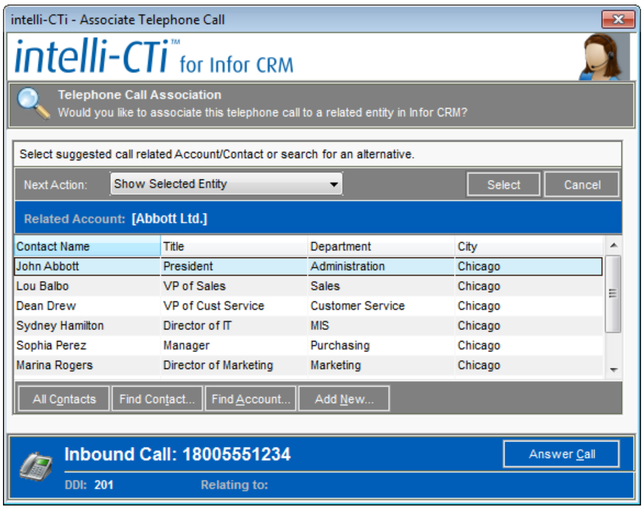
1. When an incoming call is detected by intelli-CTi, the intelli-CTi panel will expand from the side bar displaying information relating to the call.


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.*






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).

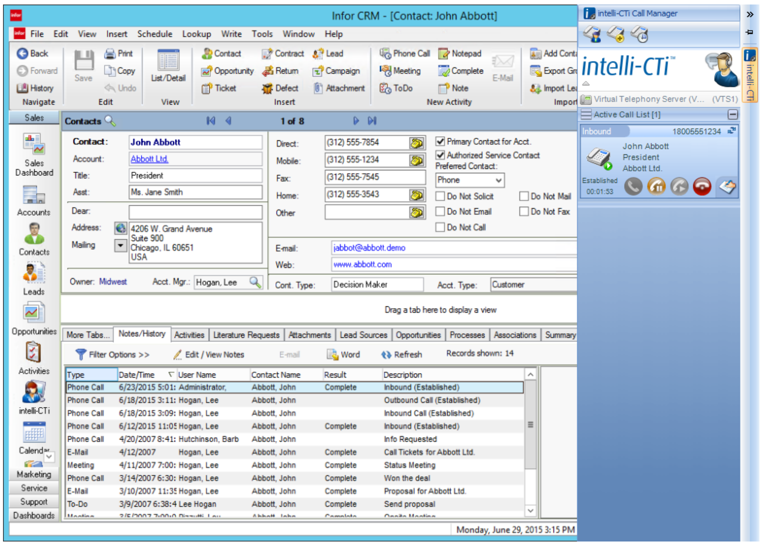
**Cancel** – Close the Associate Telephone Call dialog.



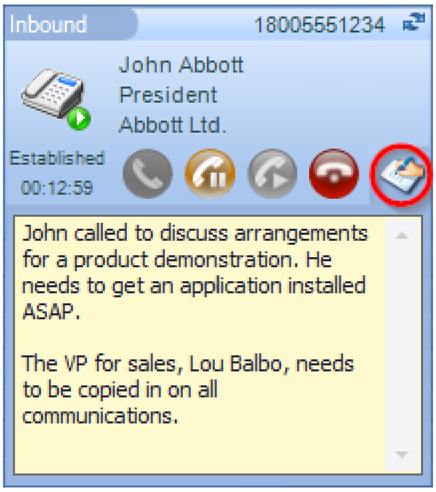
## Answering the Call

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.




### Call Notepad

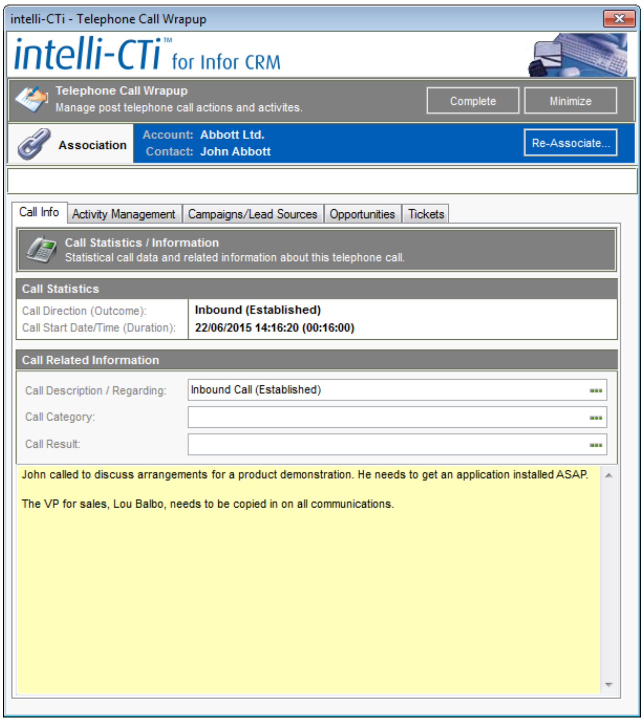
1. Details of your conversation with the caller can be captured while on the telephone by selection of the intelli-CTi **Show/Hide In-Call Notes** button on the intelli-CTi call panel.




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:

**<u>Call Info Tab</u>**

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.

**<u>Activity Management Tab</u>**

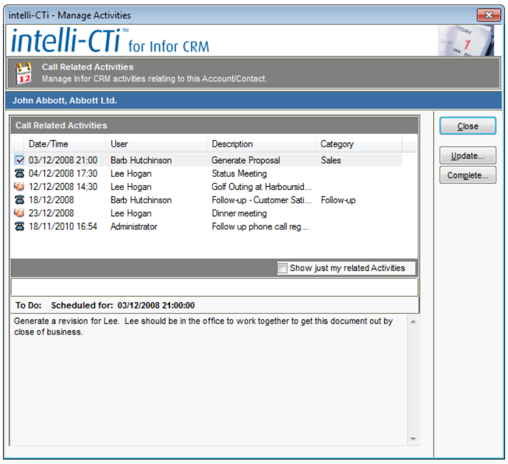


1. The **Manage Activities** section on the **Activity Management** tab displays the number of existing activities associated with this contact.

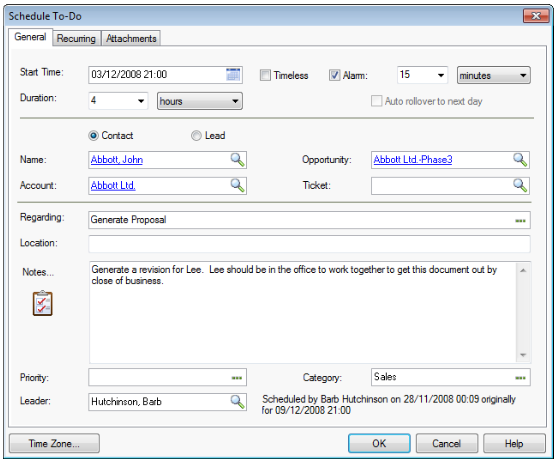

2. Select the **Manage…** button to associate this call with an existing activity.

*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.*




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

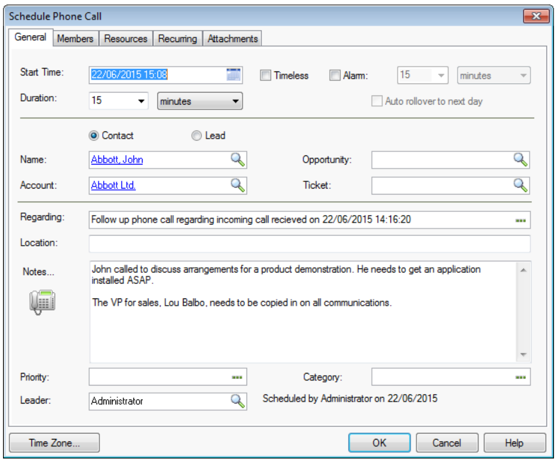
3. Click on the **Just My Related Activities** check box to only display the activities where you are the leader.
4. Click on the **Update…** button to display the Infor CRM activity dialog and update any relevant details.




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

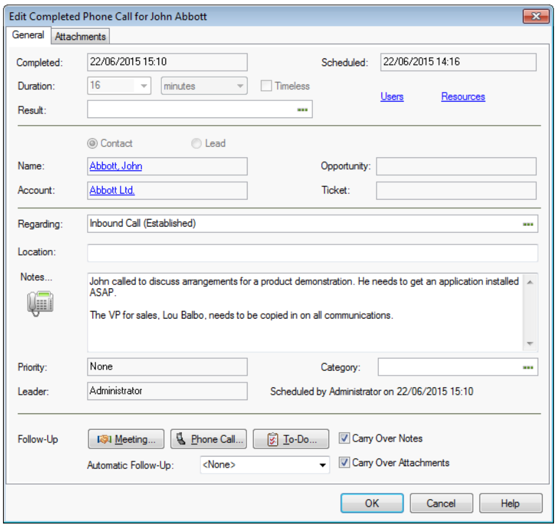





10. The Infor CRM Schedule Activity dialog is displayed and automatically populated with the phone call details captured in intelli-CTi, call date, time, duration and notes.
11. Complete the Infor CRM Schedule dialog then **OK**.
12. Click on the **Record History**, **Create History…** button to record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



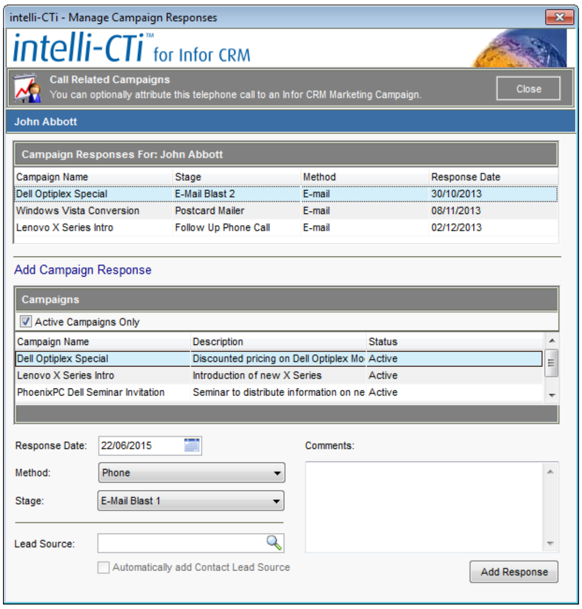

13. Click **OK**.



## Campaign/Lead Source Tab


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.

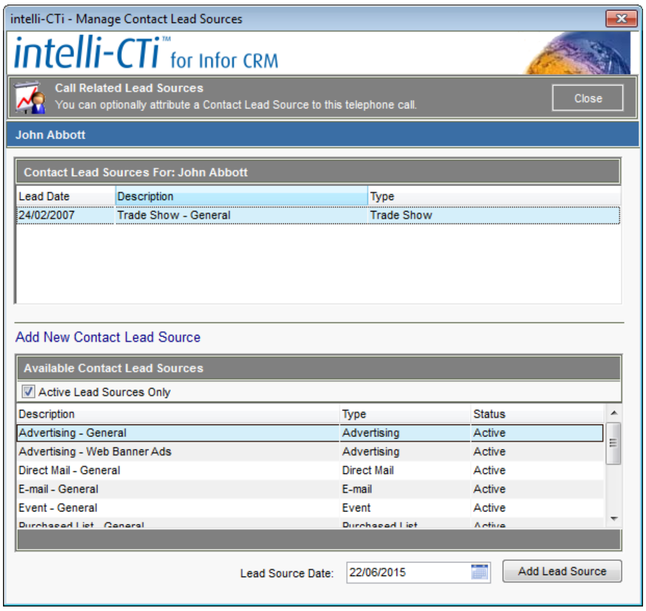



4. Click on the **Active Campaigns Only** check box to see or hide non-active campaigns.
5. From the Manage Campaign Response dialog, click on the **campaign name** associated with this call.
6. Complete the details in the lower section of the dialog then click on the **Add Response** button.

*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.




*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**


*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.

**<u>Tickets Tab</u>**


*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.

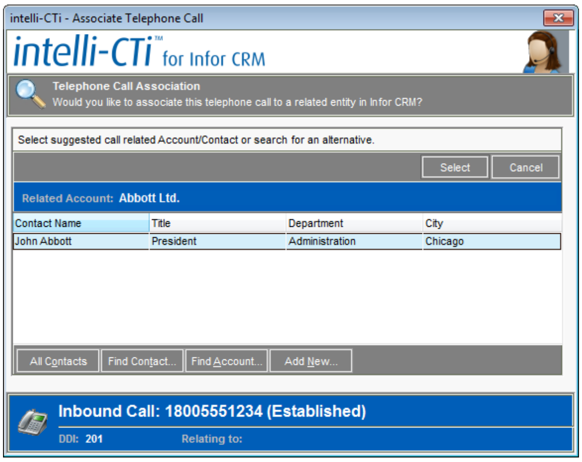
**<u>Telephone Call Wrapup Buttons</u>**

**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.




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.**



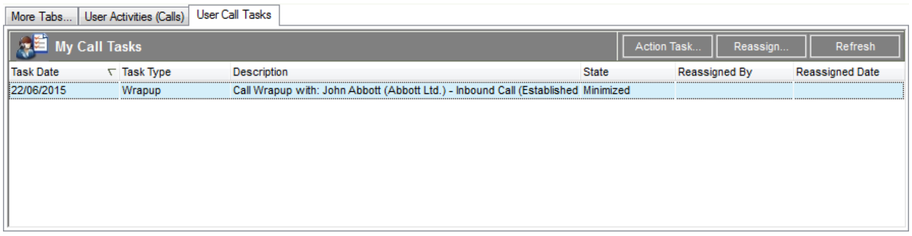
- **Find Account… – Enables the user to search Infor CRM for the required account name.**
- **Add New… – Opens the Infor CRM Add New Contact/Account dialog.**

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.

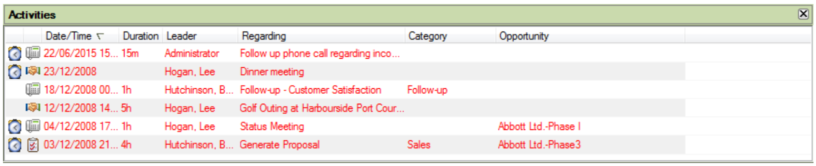
*See the User Call Tasks section on page 46 for more information.*




**<u>CRM Details</u>**

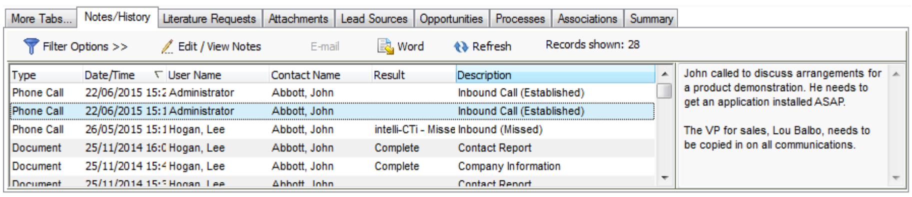
### Schedule a New Activity

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




### Call History

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





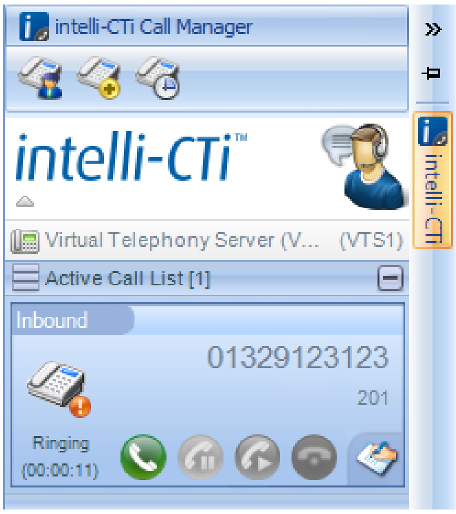
## Incoming Telephone Number Not Recognised

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.

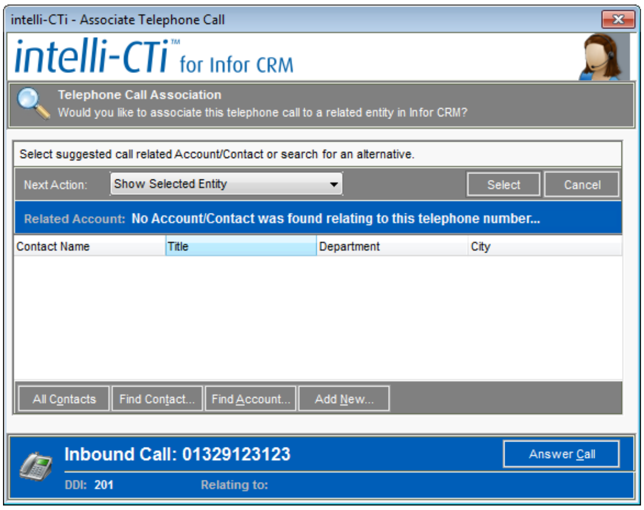
### Scenario

*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



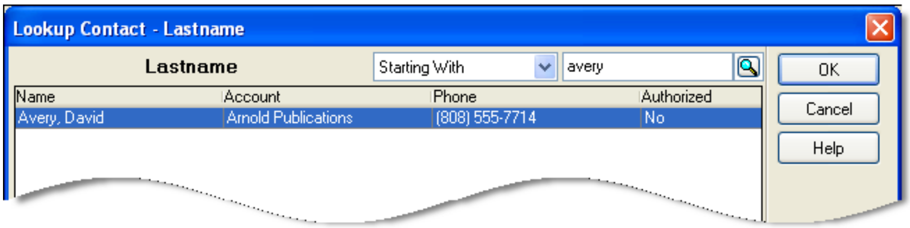

1. The intelli-CTi panel expands from the side-bar to notify of the call. In Infor CRM, no contact details are displayed as the incoming number is not recognised.




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.

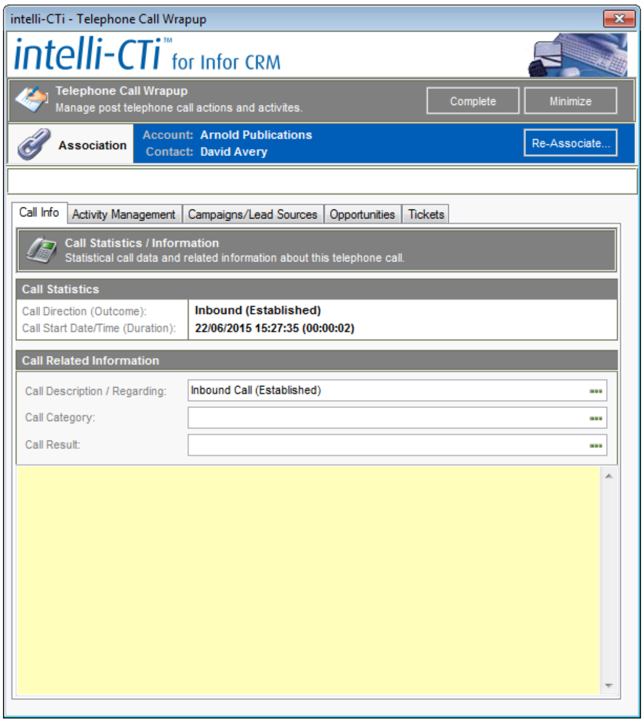




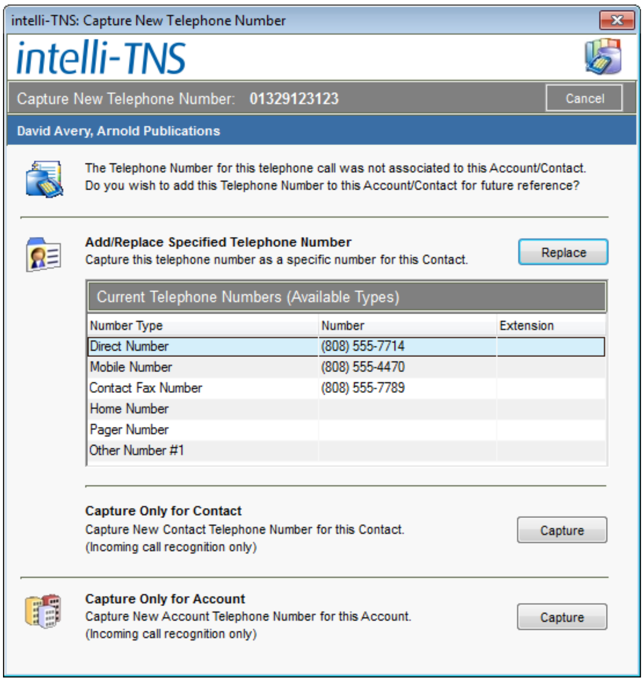

5. From the Infor CRM Lookup dialog, locate David Avery's contact record.


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




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




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:

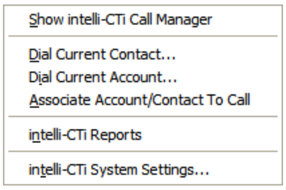
- Manually using the telephone handset.

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

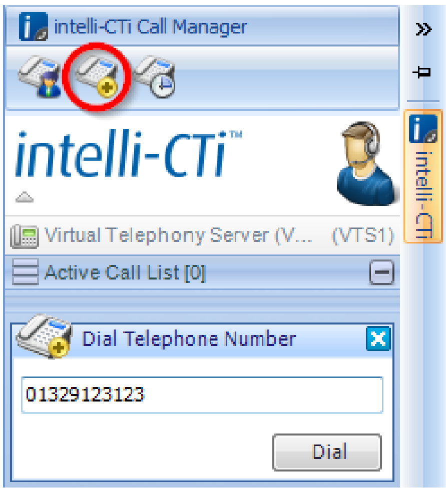
- Using the call number buttons in Infor CRM.


*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.




- Dial directly using the intelli-CTi Dialer.

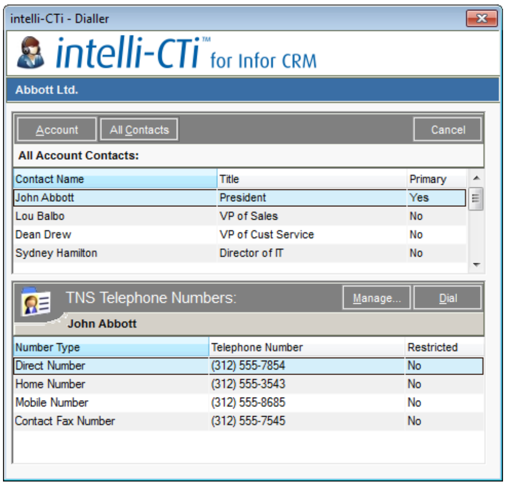



*On dialing a number that exists in Saleslogix, the Associate Telephone Call dialog will be displayed for confirmation of the contact being called.*

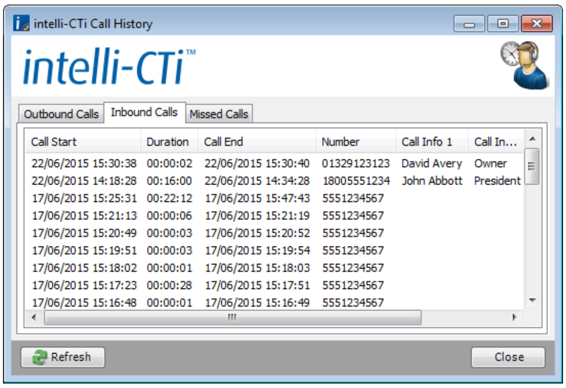
- Using the Show Dialer button on the Infor CRM toolbar. 



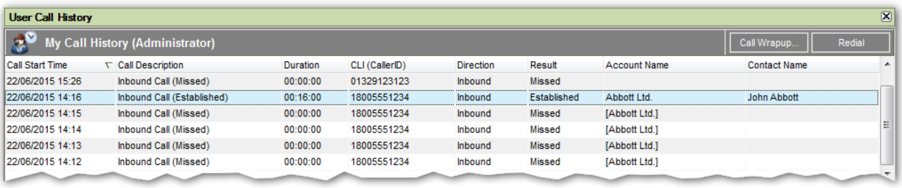
 



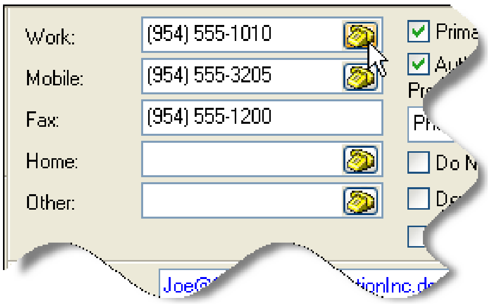

- Double clicking on a number from the intelli-CTi Call History display.




- Use the Redial button from the Telephony Call Manager.




## Dialing Out Using the Call Number Buttons



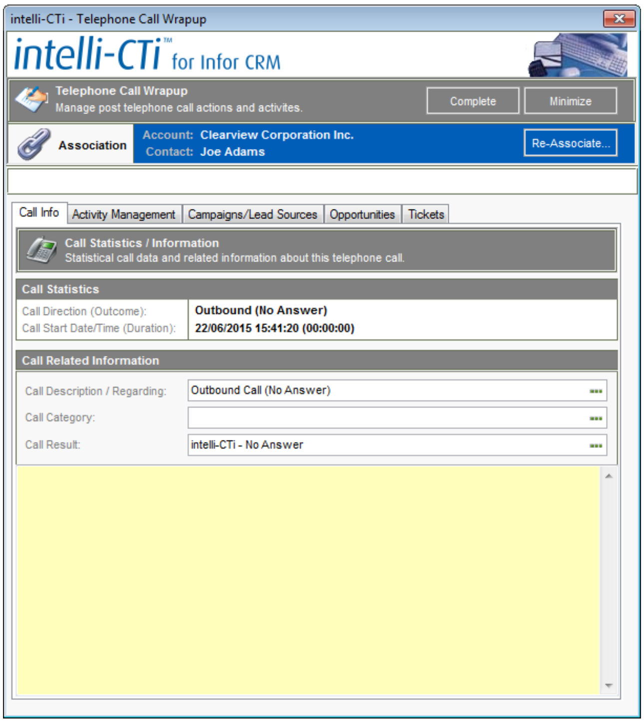

1. From Infor CRM Account/Contact views, click on the **call number** button.

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

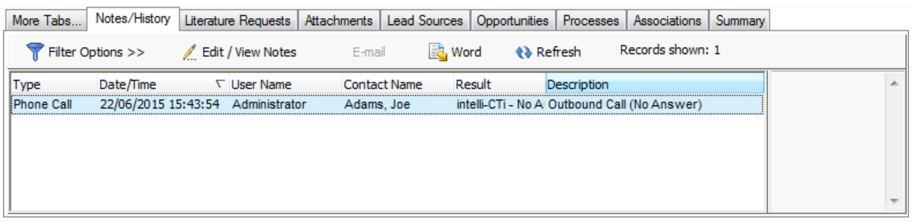

2. The intelli-CTi panel will be automatically displayed showing the call details.

**No Answer**

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




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.

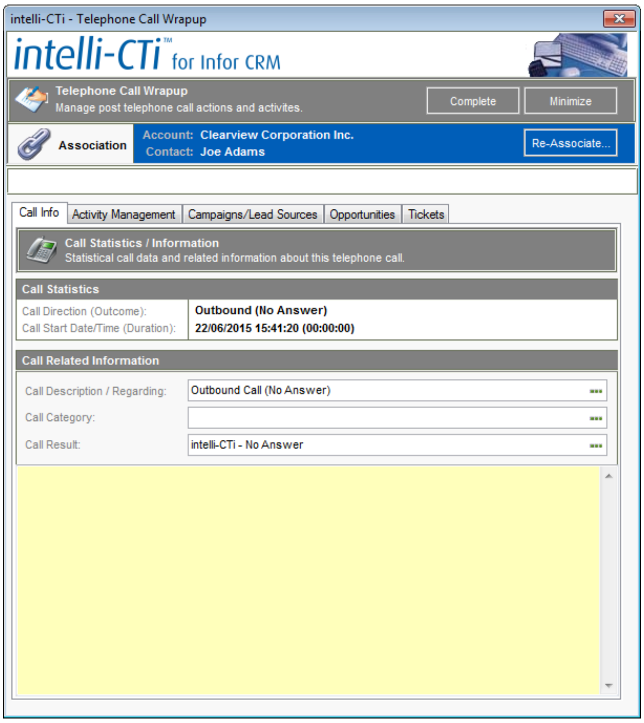




**Line Busy**


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




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.

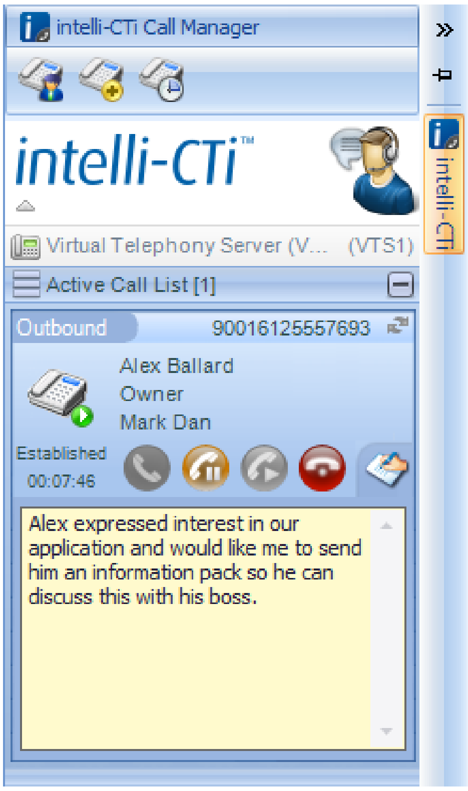
**Call Answered**

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. 

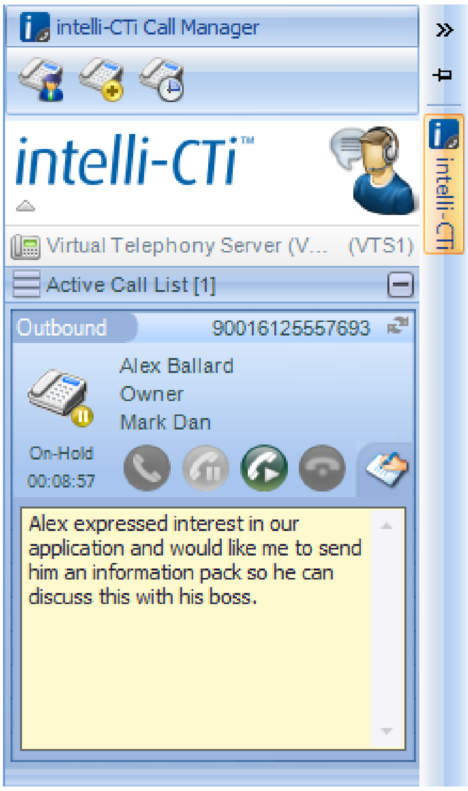





*The Call Notes function enables the user to capture details of the conversation while still on the phone. The notes will be automatically saved to the Wrapup dialog and the Infor CRM Notes/History.*

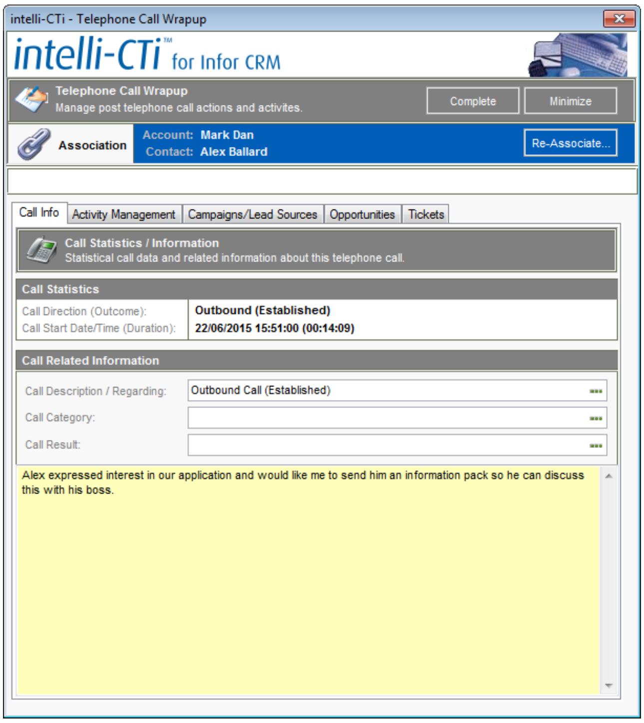
3. At any time during the call you can put the call on **Hold** using your telephone handset or by clicking the intelli-CTi **Hold Call** button.




*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**




*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.

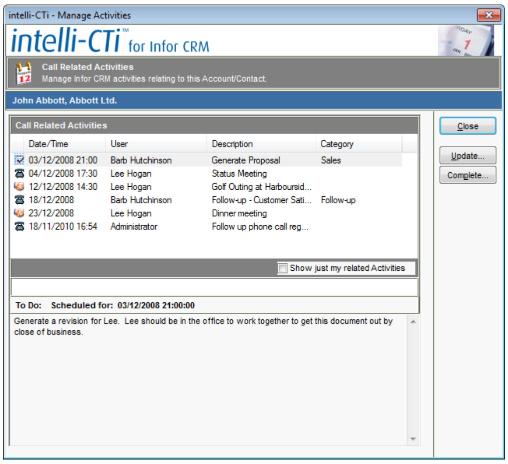
## Call Wrapup - Activity Management Tab


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.*

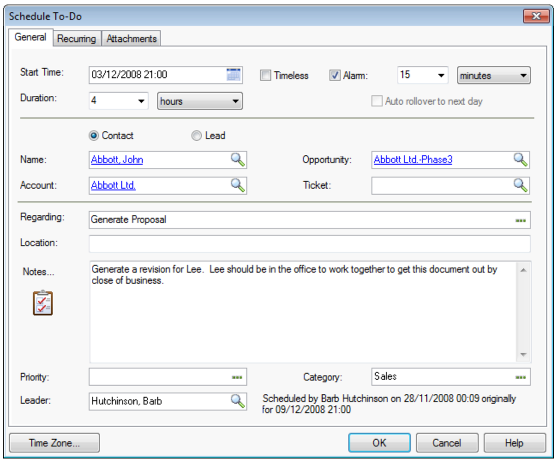



*The Manage Activities dialog displays a list of all scheduled activities with this contact in Infor CRM.*

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.



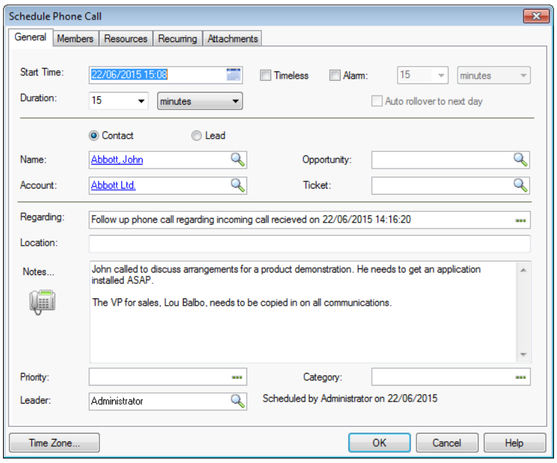
 




5. Click on the Manage Activities **Complete…** button to display the Infor CRM Complete Activity details dialog.

*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

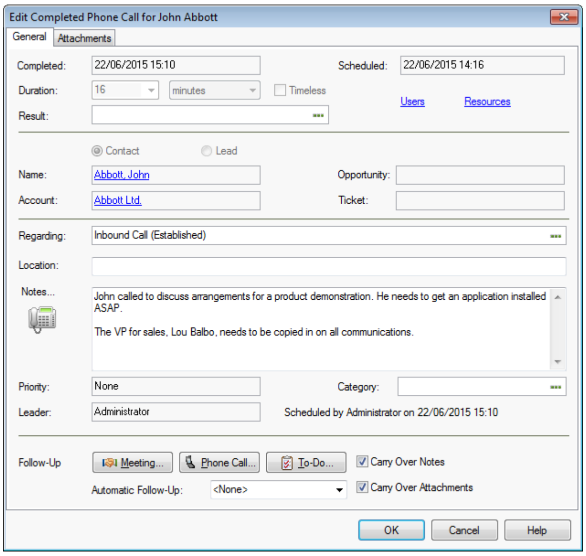



10. The Infor CRM Schedule Activity dialog is displayed and automatically populated with the phone call details captured in intelli-CTi, call date, time, duration and notes.
11. Complete the Infor CRM Schedule dialog then **OK**.
12. Click on the **Record History**, **Create History…** button to record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



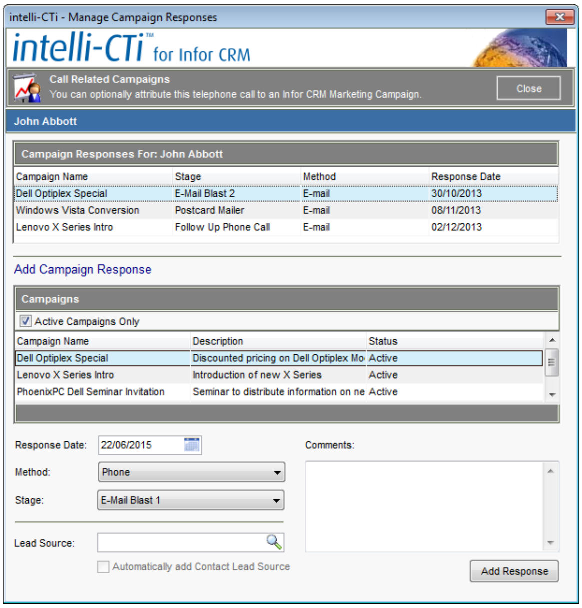
 




13. Click **OK** in Infor CRM.

## <u>Call Wrapup - Campaign/Lead Source Tab</u>

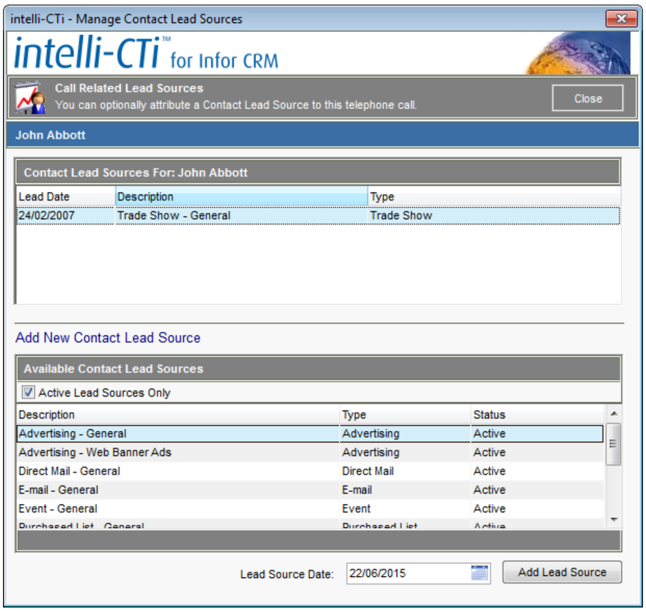

1. The **Campaign/Lead Source tab** will allow you to associate this call with a Campaign by creating a response record, and/or Lead Source within Infor CRM.
2. Click on the **Add Quick Response** button to add the default response values.
3. Click on the **Add Detailed Response…** button to record a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




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.




*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**


*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**


*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.



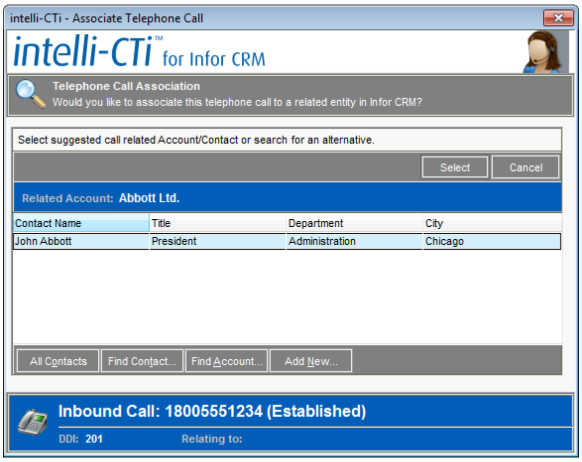
## Telephone Call Wrapup - Buttons

### Complete

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

### Re-Associate…

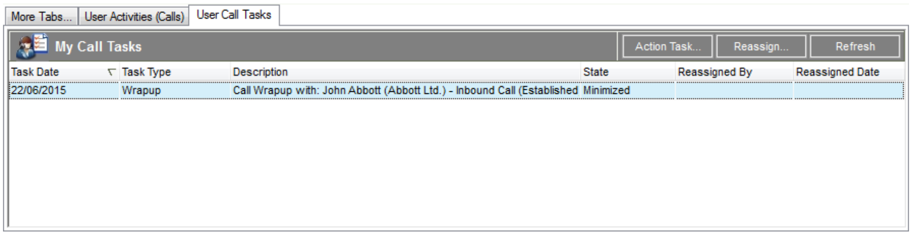
1. Click on the **Re-Associate…** button to associate this call with another contact in Infor CRM.




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

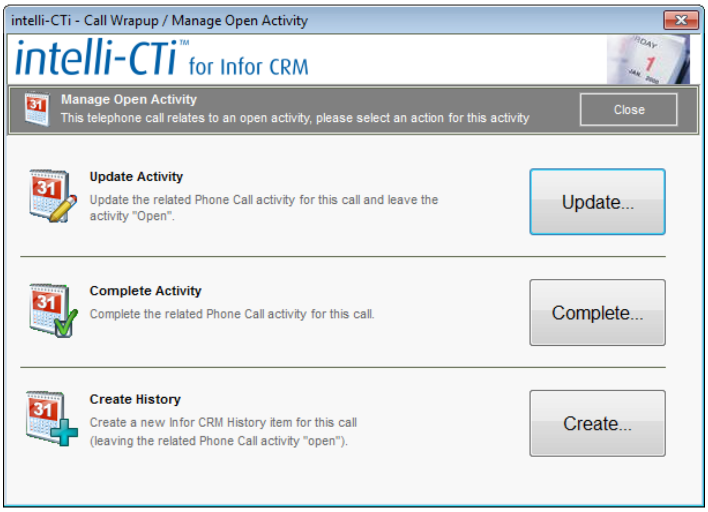
The Minimize button will temporarily close the dialog and store it in the **My Call Tasks** section of the **Telephone Call Manager** for completion at a later date.




*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”).




*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**

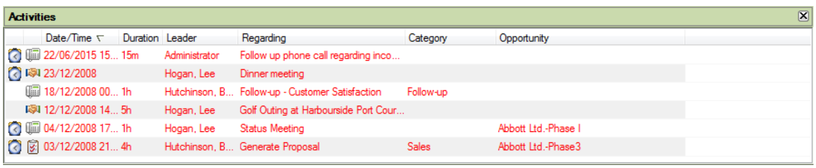
This action will create a new Infor CRM history record with the details of the telephone call, but will not make any changes to the (existing) related Infor CRM phone call activity record.

**Note:** Performing this action will also close this dialog.

## CRM Details

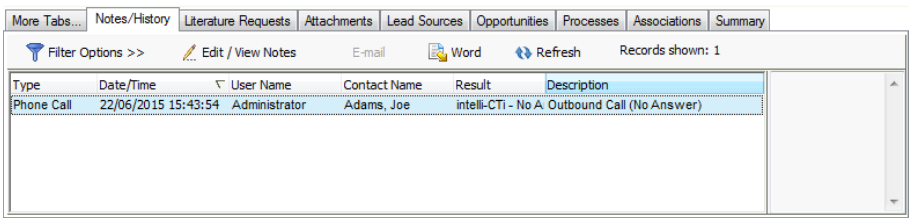
**Schedule a New Activity**

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.




**Call History**

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





## Dialing Out from the Opportunities View

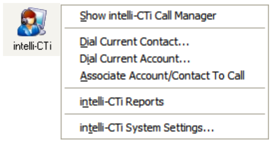
Dialing a telephone call from the Opportunities view can be performed using the intelli-CTi Dialer. The Dialer will automatically display the telephone details of the opportunity account. From this dialog, a search can also be made to locate any account or contact on the Infor CRM database.

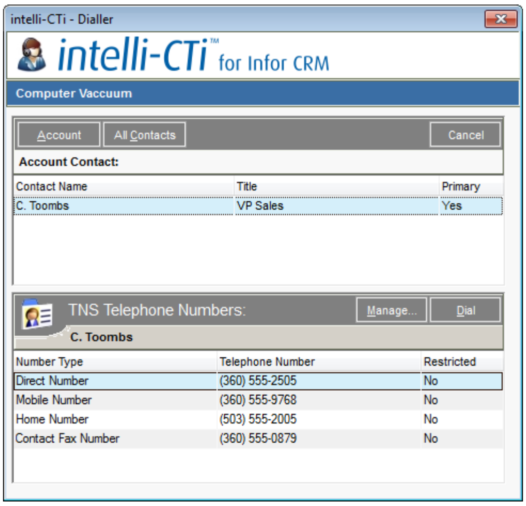
### Scenario

*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…**



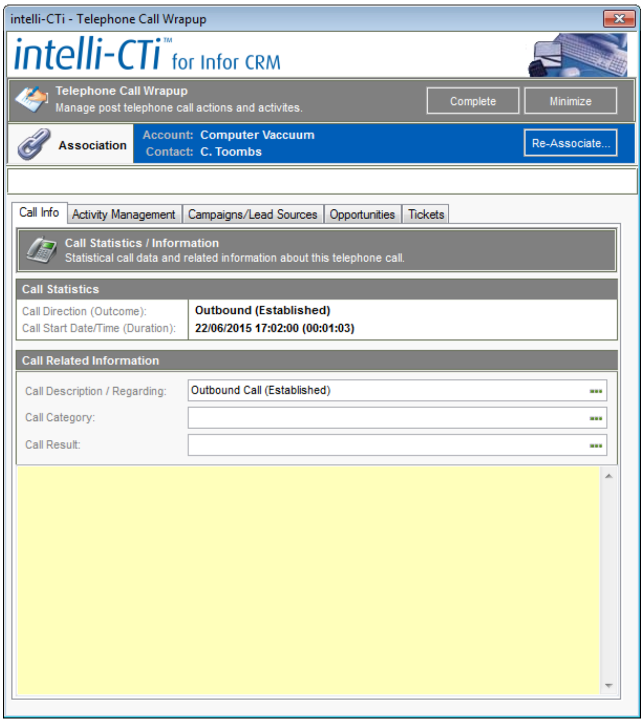

2. From the Dialer dialog, select the phone number then click on the **Dial** button


*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.





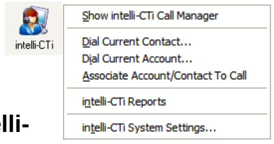
## Dialing Out from the Tickets View

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

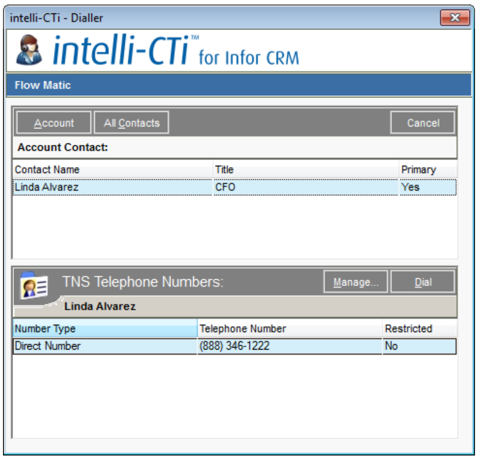
*You are updating the ticket information for the Flow Matic ticket and want to call the ticket contact, Linda Alvarez to discuss the current status.*

### Step by Step

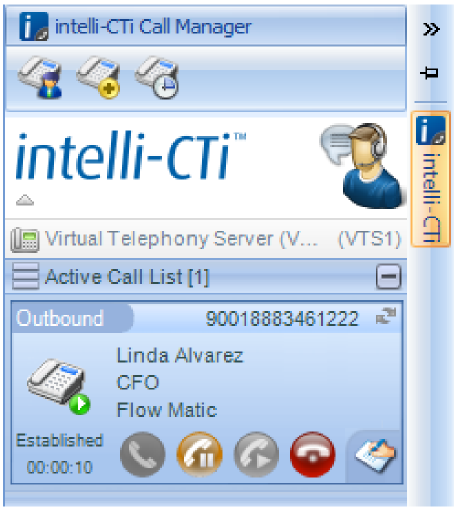



1. From the Ticket view, click on the **Show Dialer** button

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




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



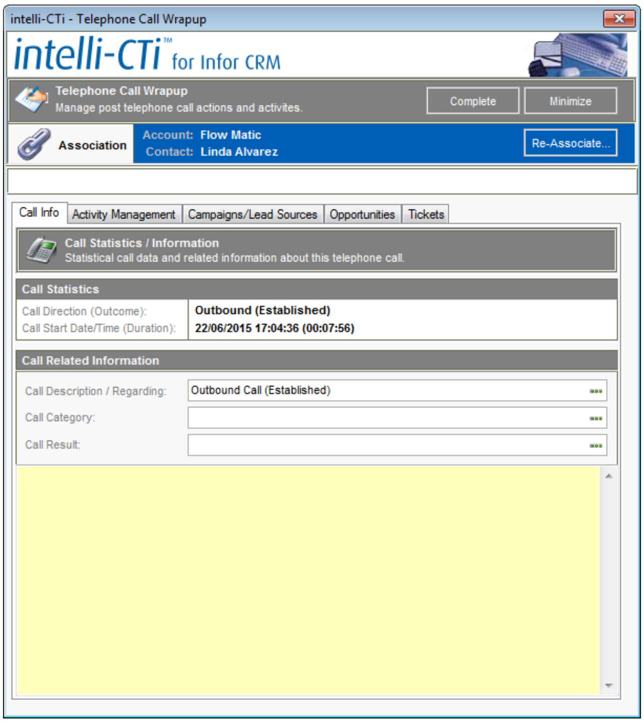

*The intelli-CTi panel will display the call details.*

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.





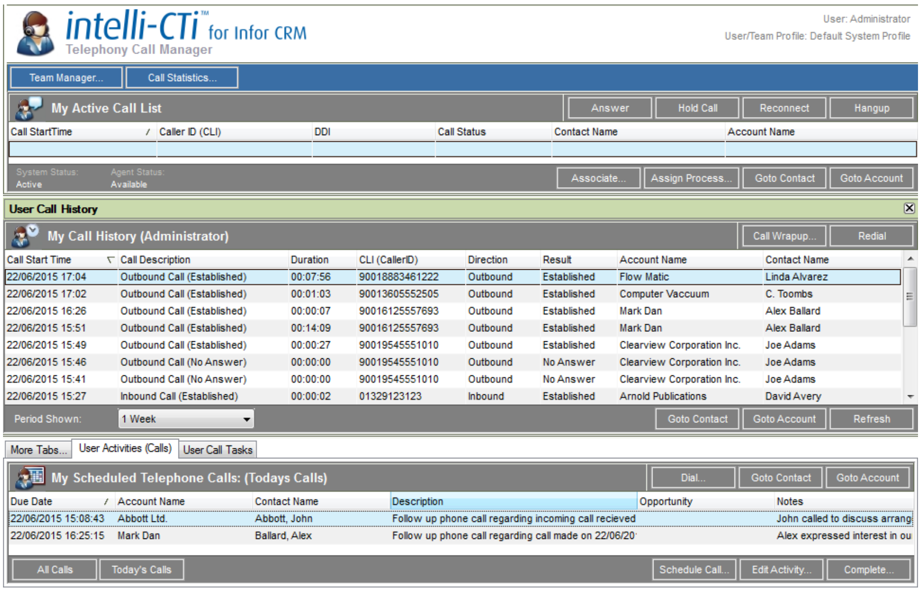

 

# Call History – Infor CRM LAN Client

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**



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.

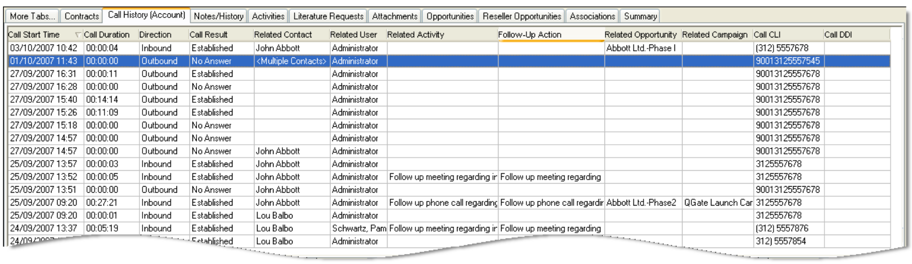
**My Call Tasks** – a list of phone calls that have got to the Call Wrapup stage but Wrapup details have been postponed until the user is ready to complete the details.

**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.



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.

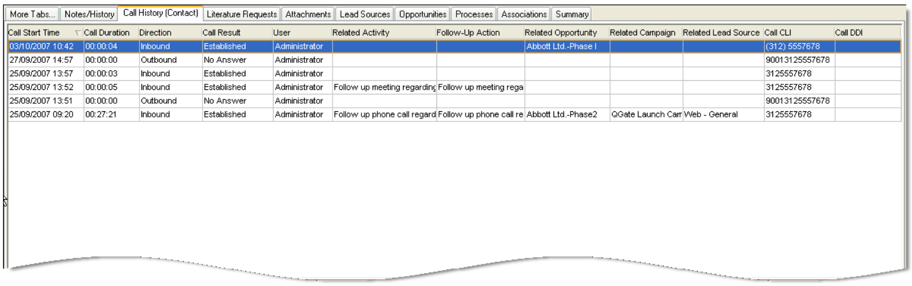


- **Call Result** – Established or No Answer.
- **Related Contact** – The name of the contact associated with making or receiving the phone call.
- **Related User** – The name of the Infor CRM user making or receiving the phone call.
- **Related Activity** – The details of the Infor CRM activity that 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.




| 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 Ltd.-Phase 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 | |
| 25/09/2007 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 Ltd.-Phase2 | QGate Launch Cam | 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.

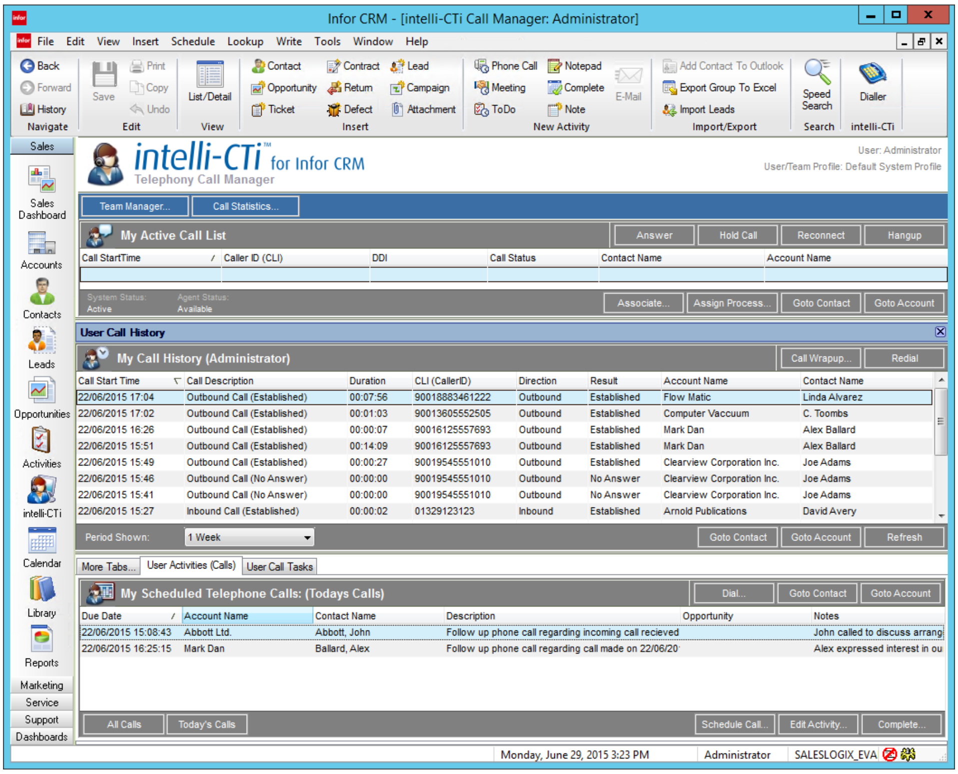
# Telephony Call Manager – Infor CRM LAN Client

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.

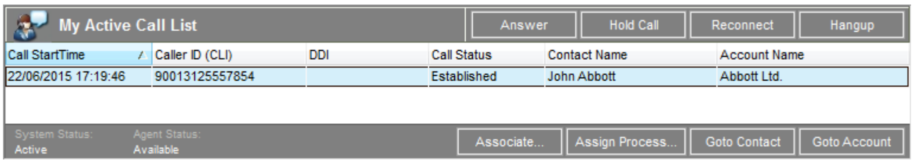





## My Active Call List

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

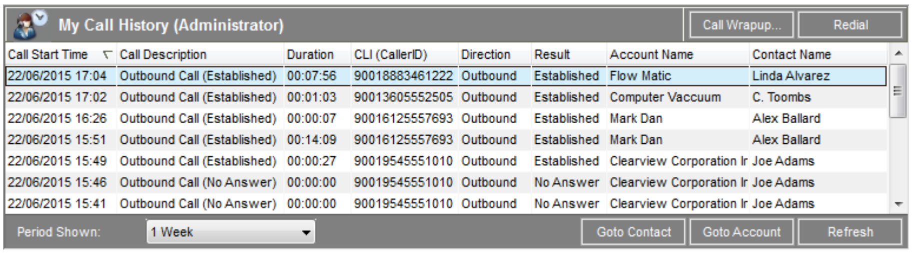



**My Active Call List Buttons:**

- **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.

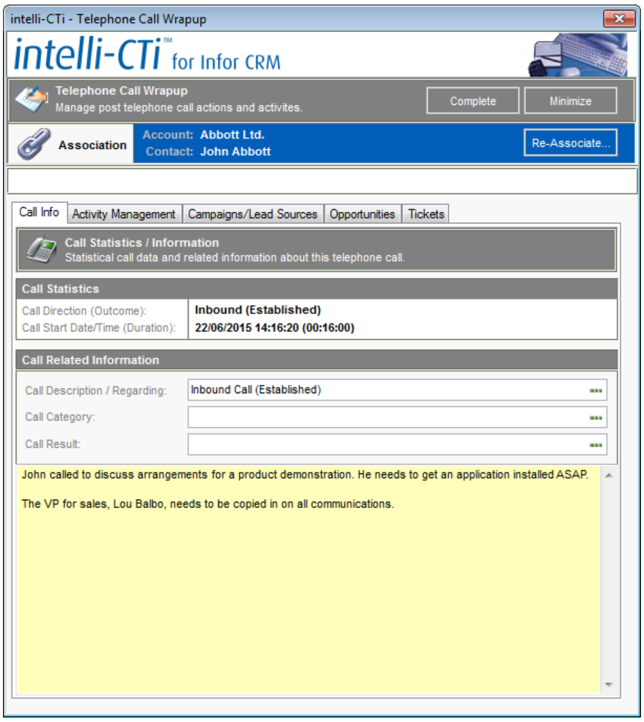



**My Call History Buttons:**

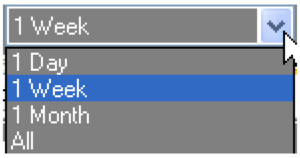
- **Call Wrapup…** – Select the required item in the list then the Call Wrapup button to view the Call Wrapup dialog.






- **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.

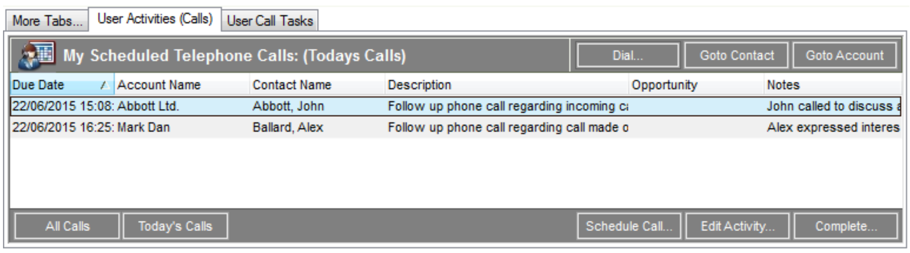



*If you have a large amount of call history, selecting 1 Month or All can cause a delay when displaying the My Call History panel.*

- **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.

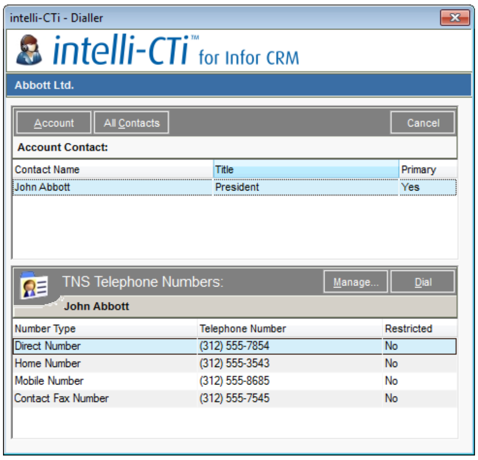
## User Activities (Calls) Tab

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




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

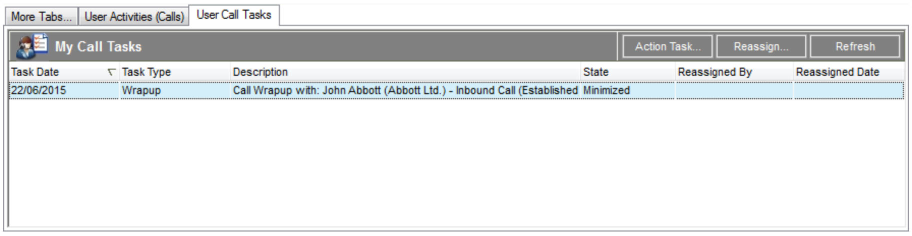
- **Dial** – Displays the Dialer dialog which lists all numbers available for the selected contact, and allows you to pick one to dial.




- **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.




**<u>User Call Tasks Buttons:</u>**

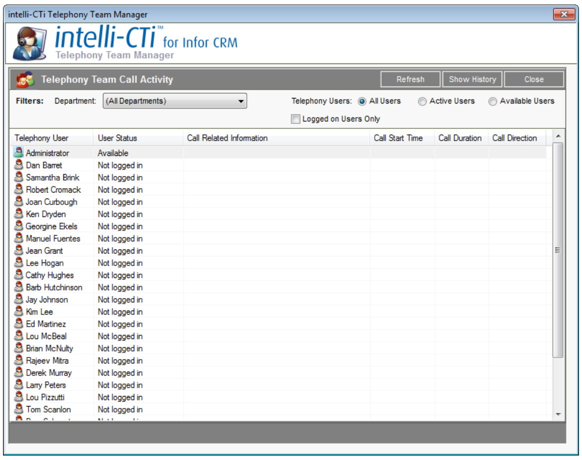
- **Action Task…** – Opens the Telephone Call Wrapup dialog for the selected call.
- **Reassign…** – Reassign the selected Wrapup call to another user.
- **Refresh** – Refresh the User Call Tasks list.

## 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?





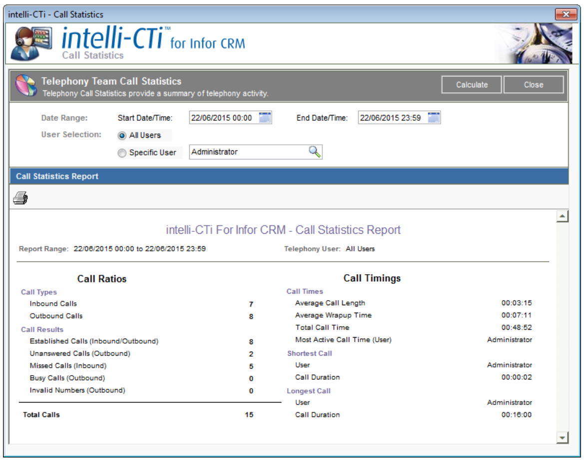

You can filter the list by:

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

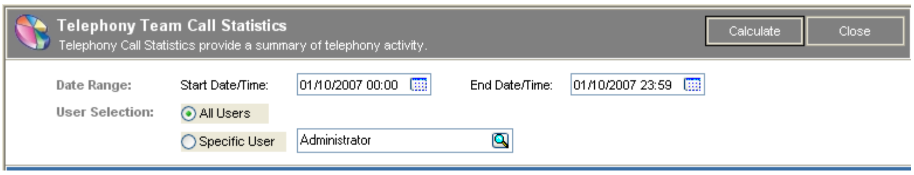
Clicking the **Show History** button displays the call history for the selected user.

## Call Statistics Button

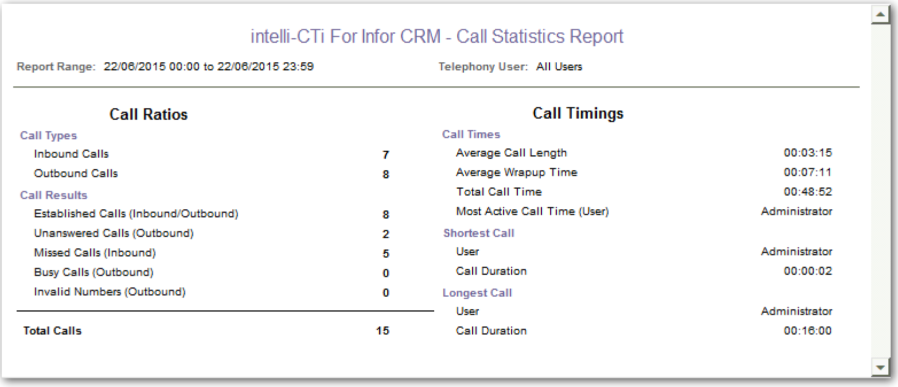
Select this button to display the Call Statistics dialog.




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




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.



intelli-CTi For Infor CRM - Call Statistics Report

Report Range: 22/06/2015 00:00 to 22/06/2015 23:59 Telephony User: All Users

**Call Ratios**

| | |
|---|---|
| **Call Types** | |
| Inbound Calls | 7 |
| Outbound Calls | 8 |
| **Call Results** | |
| Established Calls (Inbound/Outbound) | 8 |
| Unanswered Calls (Outbound) | 2 |
| Missed Calls (Inbound) | 5 |
| Busy Calls (Outbound) | 0 |
| Invalid Numbers (Outbound) | 0 |
| **Total Calls** | 15 |

**Call Timings**

| | |
|---|---|
| **Call Times** | |
| Average Call Length | 00:03:15 |
| Average Wrapup Time | 00:07:11 |
| Total Call Time | 00:48:52 |
| Most Active Call Time (User) | Administrator |
| **Shortest Call** | |
| User | Administrator |
| Call Duration | 00:00:02 |
| **Longest Call** | |
| User | Administrator |
| Call Duration | 00:16:00 |

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



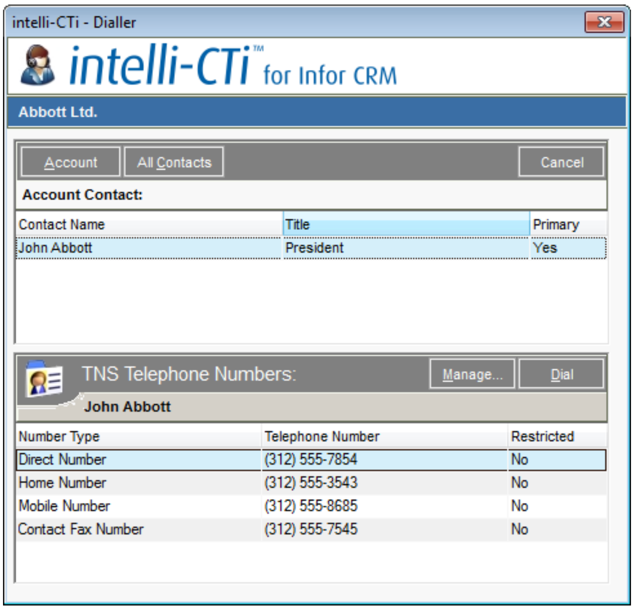
 

# intelli-CTi Toolbar and Menu – Infor CRM LAN Client

## 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.




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

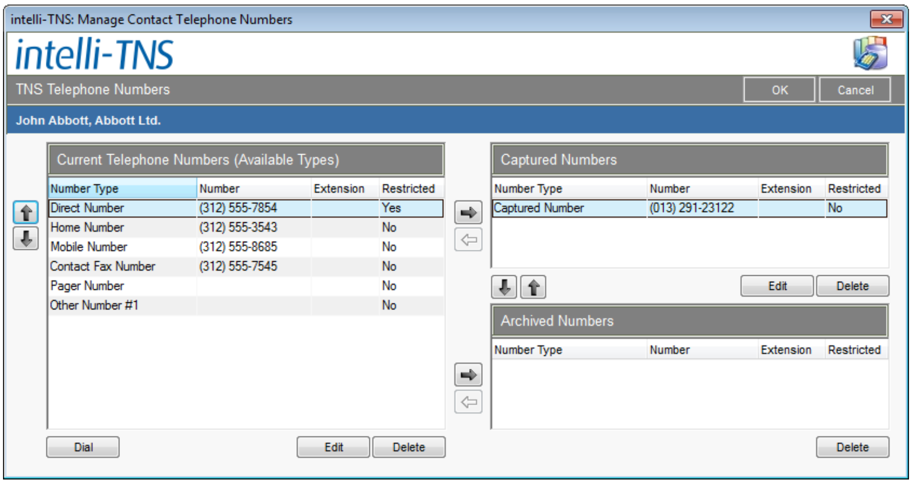
The Manage TNS Telephone numbers dialog enables additional management of telephone numbers:

**Edit Numbers** – Edit, delete or archive listed Account, Contact and Lead numbers.

**Captured Numbers** – Assign, edit, delete or archive captured numbers.

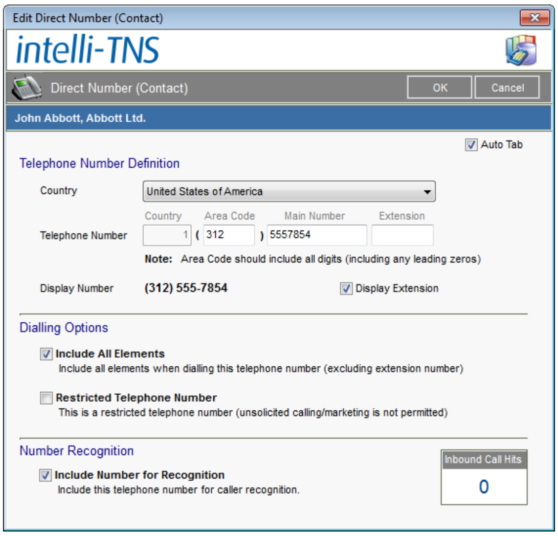
**Archive Numbers** – Remove from view and archive selected numbers.

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.




### <u>Current Telephone Numbers</u>

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




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.



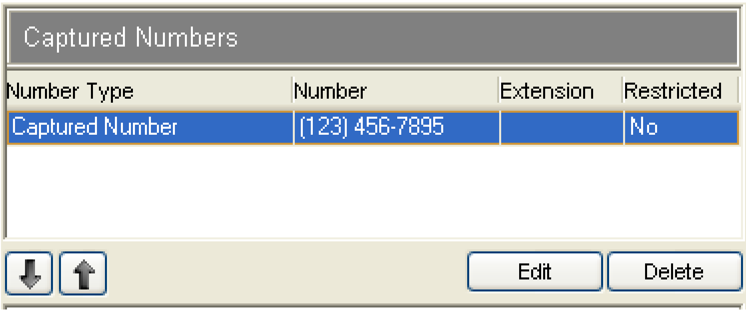
 

6. Select the **Display Extension** check box to display the extension number with the phone number.
7. Select the **Include All Elements** check box if you want the Country, Area Code and Number to be included when dialing this number.
8. Select the **Restricted Telephone Number** check box if this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

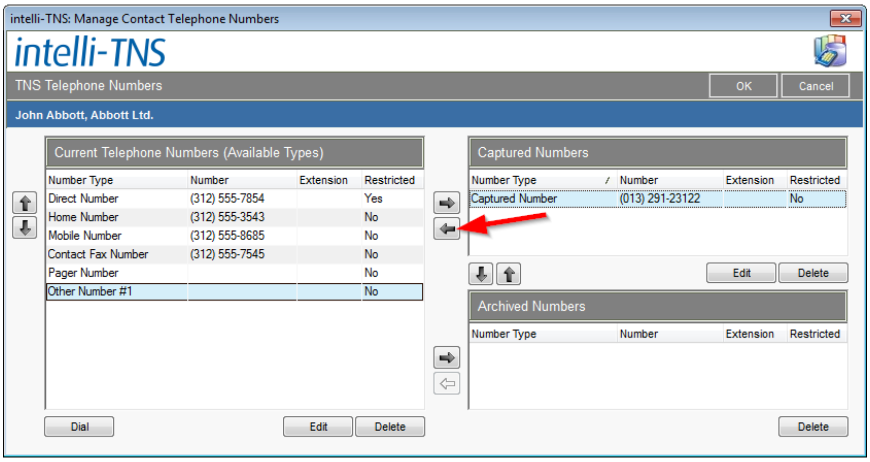

9. Select the **Include Number For Recognition** if you want this number to be used to recognize the Contact, account or Lead record on an incoming call.
10. Click **OK** when finished.

**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.




1. 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.

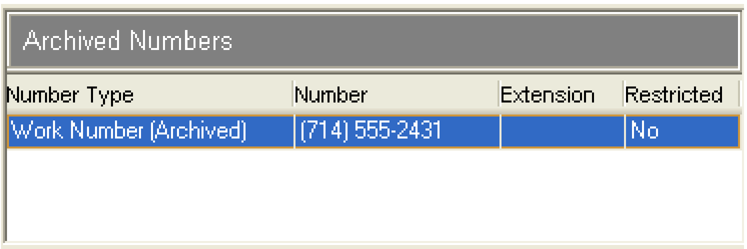



*The list of Current Telephone Numbers (Available Types) is subject to your Infor CRM customizations.*

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.



**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.

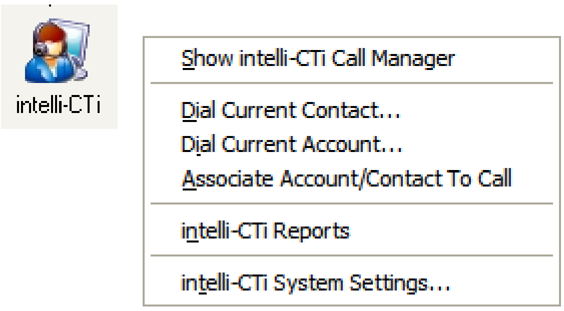


# intelli-CTi Navbar Button Menu – Infor CRM LAN Client

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 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:

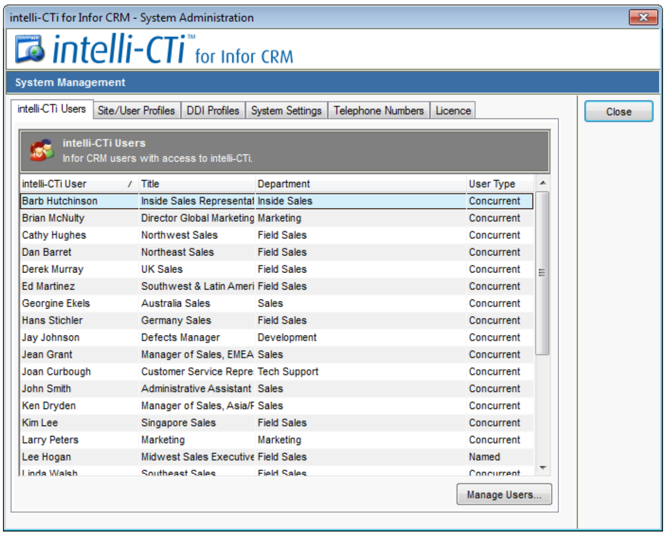
- The intelli-CTi Site
- intelli-CTi User/Team Profiles (preferences)

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.




**Managing Users**

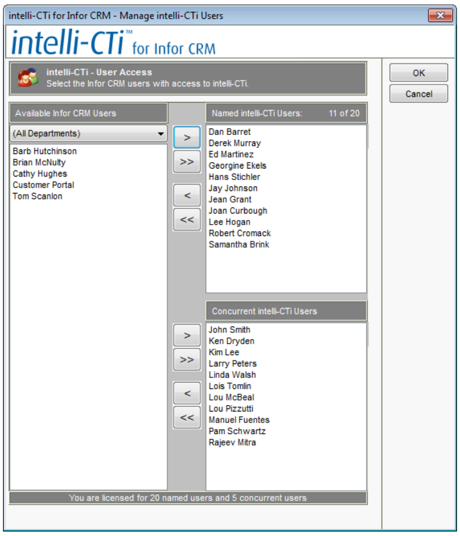
1. To manage the licensed users, click on the **intelli-CTi Users** tab.

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

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






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

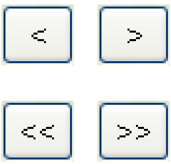
*This list will display all licensed Infor CRM users that are not currently licensed intelli-CTi users. This list can be filtered by clicking on the departments dropdown box and selecting the appropriate department.*

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**

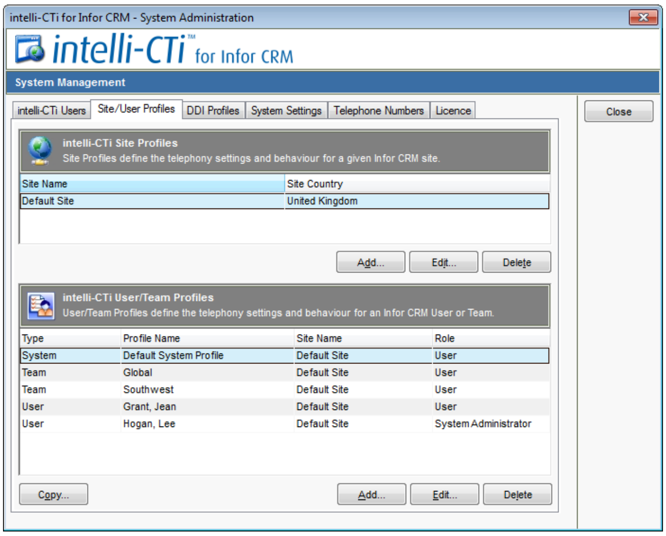
Site Profiles contain the telephony settings relating to a particular telephone system in a given location.

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.

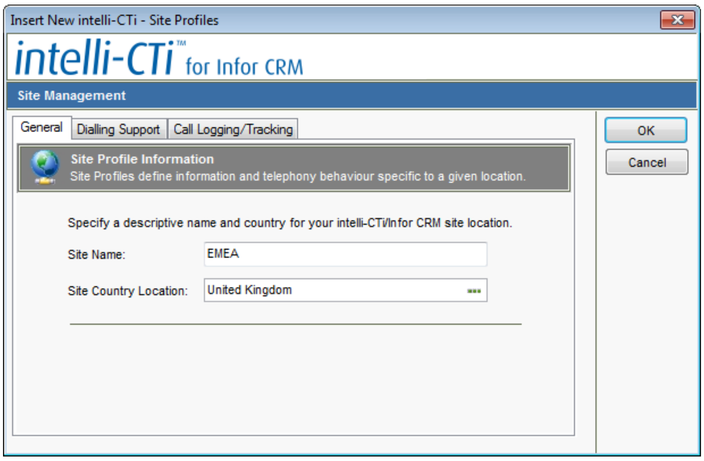



## Scenario

*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

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




2. From the General tab type a **Site Name.**

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

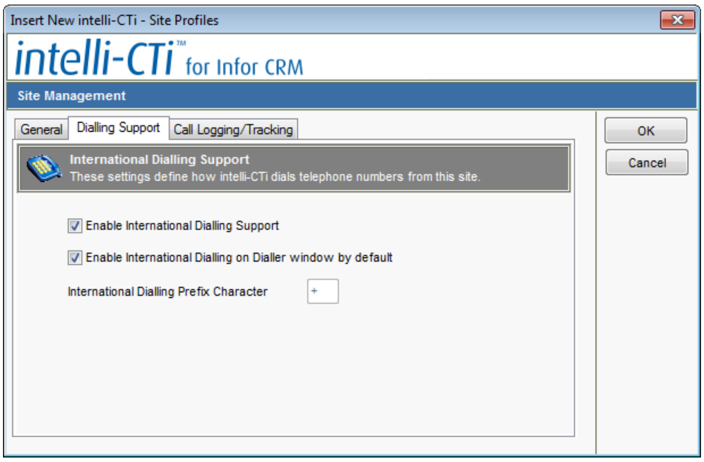


3. Click on the **Site Country Location** dropdown button and select the country location for this site.

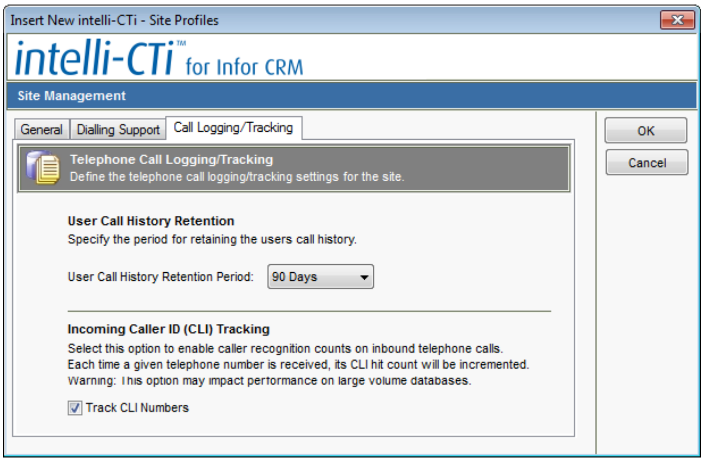
*The Site Country Location is the name of the country this Site relates to. This information is used to control worldwide considerations and terminology.*

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




*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.*

10. 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**.



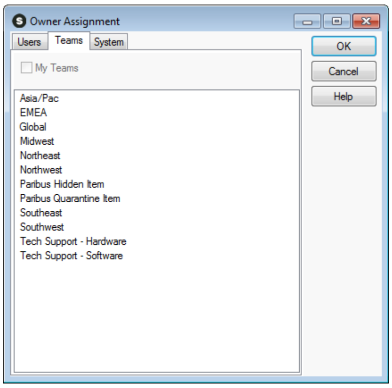
 

## Scenario

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

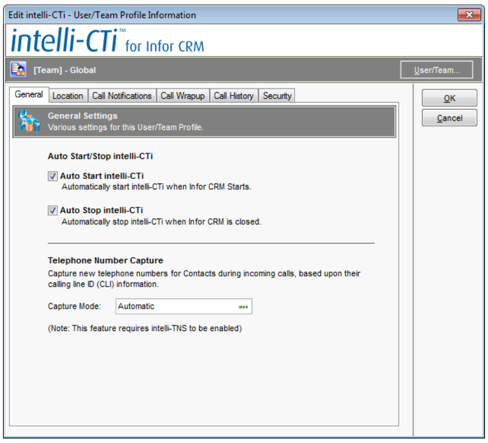
## Step by Step

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




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**




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.
7. Select the **Auto Stop intelli-CTi** checkbox to have intelli-CTi automatically stop when Infor CRM is closed.
8. 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.

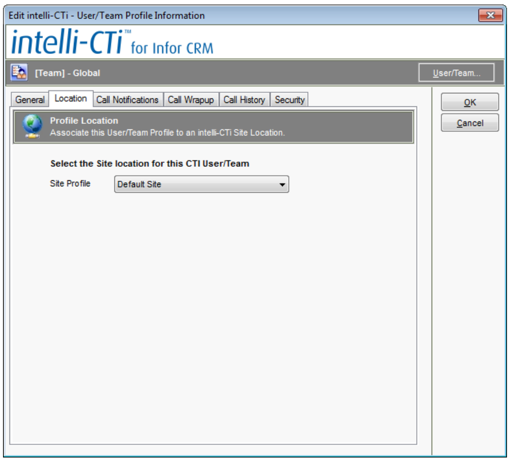


- Automatic – The number is stored as a **Captured Number** for the contact. To find out how to deal with Captured Numbers, see **intelli-TNS - Manage Telephone Numbers Window** on page 50.

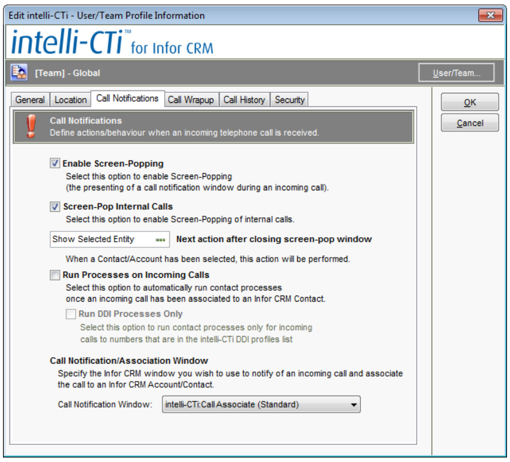
9. Click on the **Location** tab.

**User/Team Profiles – Location Tab**




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

**User/Team Profiles – Call Notifications Tab**




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.*

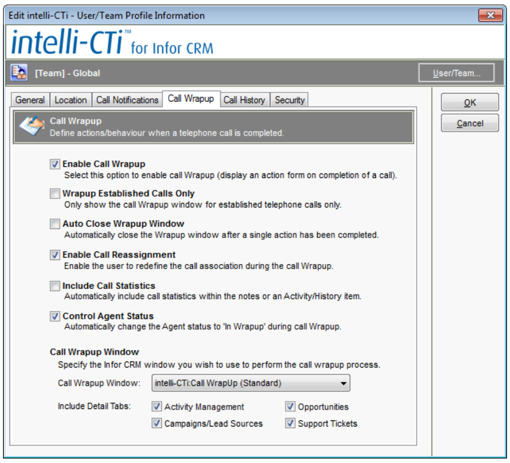
4. The **Run Process on incoming call** checkbox is for use in a future release of intelli-CTi for Infor CRM. It must be checked on if you wish to enable the **Run DDI Processes Only** checkbox.
5. Select the **Run DDI Processes Only** checkbox to run a Contact Process only for incoming calls to numbers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




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.

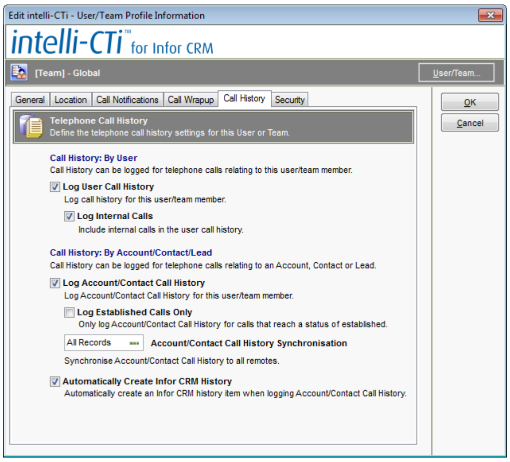
*If your system has not been customised, then there will be only one entry in this list.*

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**

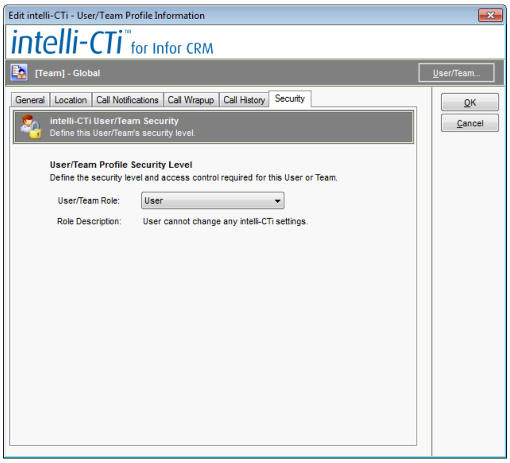



1. Click on the **Log User Call History** check box to have all external calls logged in the User Call History (As displayed in the My Call History tab of the intelli-CTi Call Manager. See page 44).
2. Click on the **Log Internal Calls** check box to include internal calls in the User Call History.
3. 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**




1. 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.

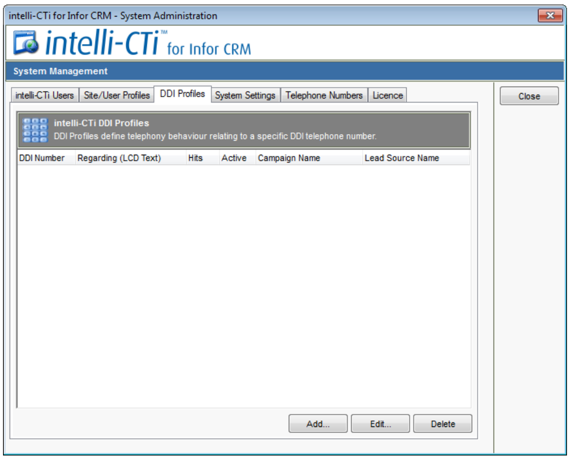
Each DDI profile has a relating text phrase, which will automatically appear in the intelli-CTi call notification display, providing users with a quick indication of the caller's likely requirement or interest.

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.

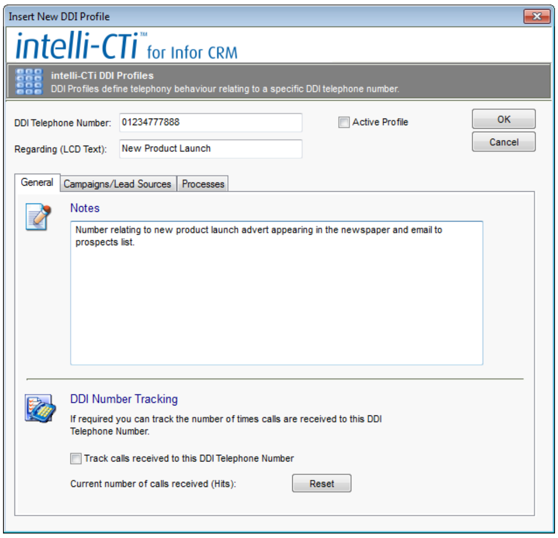
A DDI profile can be also be associated to an Infor CRM campaign, so when an incoming call is received and the DDI number identified, associate the campaign for later use by the **End of Call (Wrapup)** window.

**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.




3. Click on the **Add…** button.




4. 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.

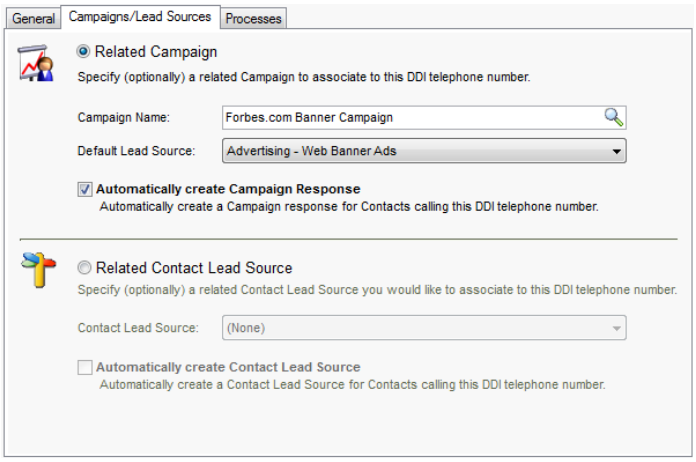


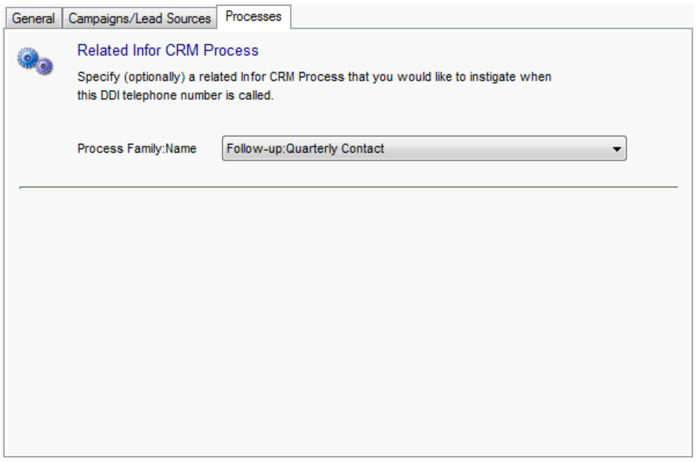
6. The **Regarding (LCD Text)** field is used to specify a short text description for the DDI profile. This short description will appear on the intelli-CTi call notification display during an incoming call.
7. The **Description** field provides the means of attributing a description for administrative 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.




10. 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.




16. Click on the **Process** tab.
17. 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.

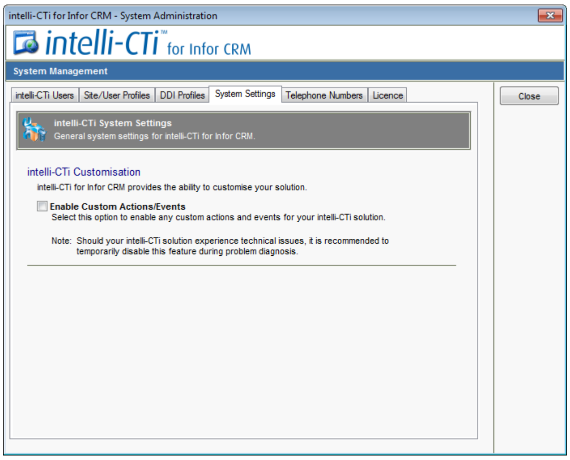


*The Contact Process will be a pre-defined Infor CRM Contact Process.*

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.

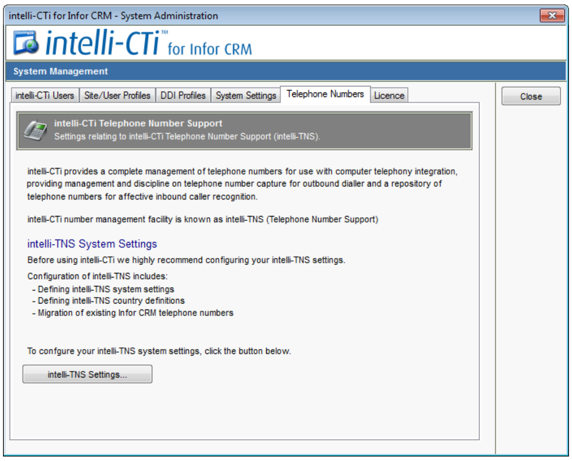
If you are experiencing problems running your application, you can turn on/off your actions/events to help you establish if the fault lies with intelli-CTi or your own customisation.

## 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.

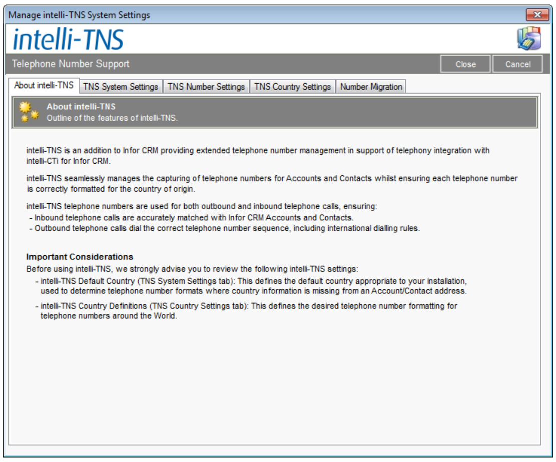
This management facility is known as intelli-TNS (Telephone Number Support)

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




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.



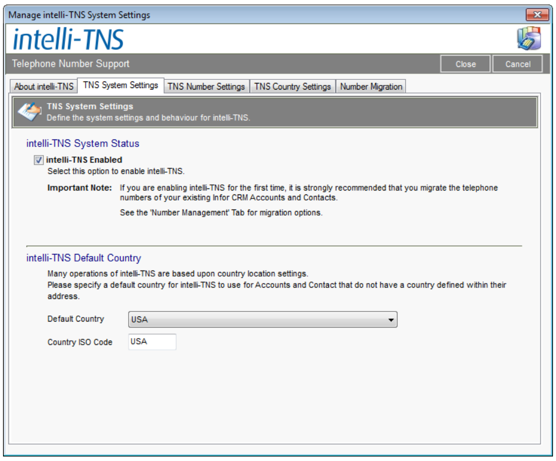

*You can also access this screen from the Tools => Manage => intelli-TNS System Settings menu.*

4. Click on the TNS System Settings tab.



## TNS System Settings Tab




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

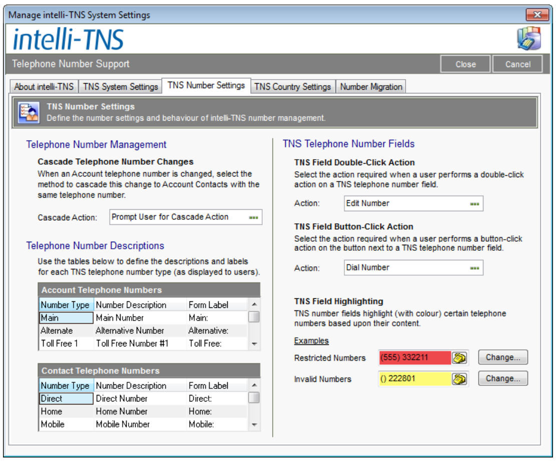
*If you are enabling intelli-TNS for the first time, it is strongly recommended that you consult the intelli-CTi for Infor CRM Getting Started Guide for details of how to migrate your existing telephone numbers into intelli-TNS.*

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.

## 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

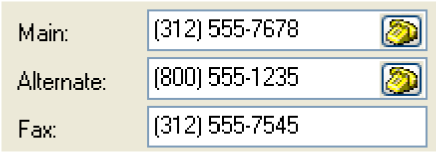
You can change the description that appears next to telephone numbers when they are displayed on forms.  For example, by default the main number for an account is called **Main Number**, but your organisation might refer to this a **Switchboard Number**.

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**

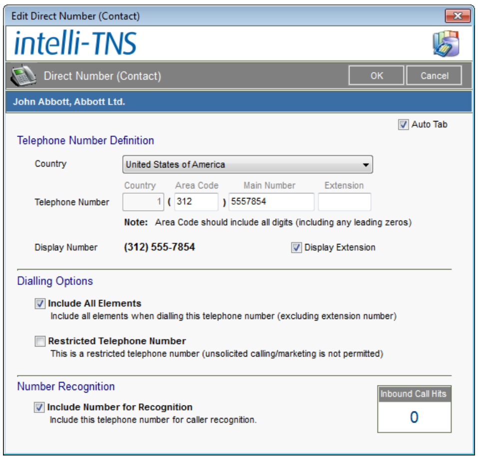
The TNS Telephone Number Fields area controls the behaviour of the telephone number fields in Infor CRM.



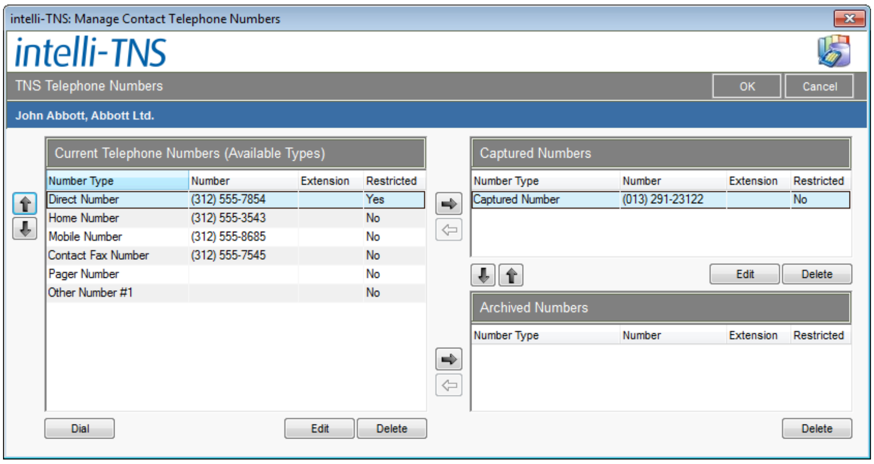

TNS Field Double-click Action:

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.




**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.

 or 

- **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:

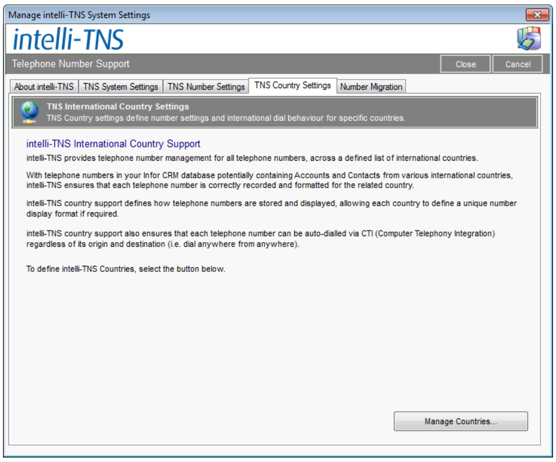
The telephone number field can be highlighted in colour based on the number contents.

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

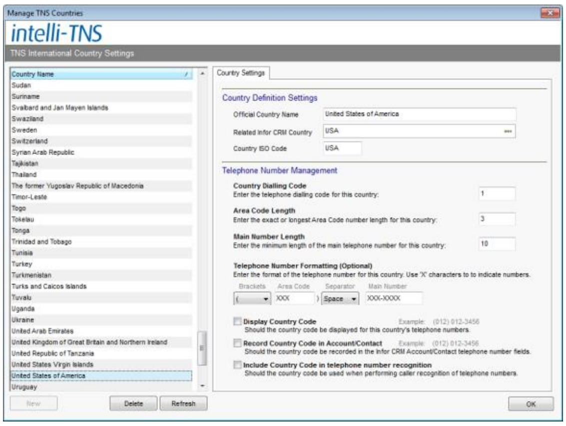
If the number is an **Invalid Number** then click on the **Change…** button and select the required highlight colour.

**TNS Country Settings Tab**

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




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




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.*

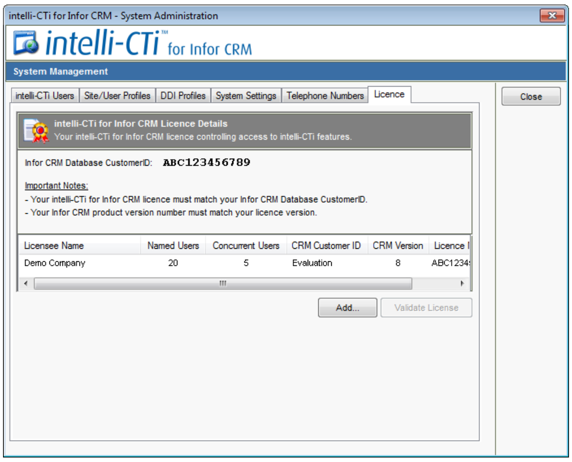
9. If you require the country code to be displayed with the telephone number, check the **Display Country Code** check box.
10. intelli-TNS stores a copy of each telephone number in the standard Infor CRM Account/Contact table. If you want these numbers to include the Country code, then check the **Record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




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: | www.QGate.co.uk |
| Americas: | www.QGateSoftware.com |

## 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.