



*intelli-CTi*TM
for Infor CRM

Version 3.5

Infor CRM Getting Started Guide

Document Version 1.8



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Overview

This document provides an outline to the basic steps required to implement intelli-CTi for Infor CRM into a custom Infor CRM database.

The purpose of this document is to assist getting started with intelli-CTi for Infor CRM, however for more detailed information on installing, configuring and using intelli-CTi, please see the additional intelli-CTi reference information.

Who Should Read this Document

This document is intended for Infor CRM administrators responsible for implementing intelli-CTi upon a custom Infor CRM system.

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 using and administering intelli-CTi for Infor CRM LAN client, see the *intelli-CTi – Infor CRM LAN Client User/Administrator 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 Infor CRM 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 for Infor CRM

intelli-CTi for Infor CRM provides seamless telephony integration into Infor CRM LAN Client and Web Client, providing many telephony features to enhance the usability of your Infor CRM application.

Features include:

- Preview-dialing directly from within Infor CRM.
- Automatically identifying and displaying of 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*.
- Automatic capture of 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 call history management.
- Enhanced Telephone Number Support (intelli-TNS).
- User configurable options and system administration.

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

Database Backup

Although every effort has been made to ensure the actions performed by this software product will not damage or corrupt your data, we strongly recommend you perform the following actions to safeguard against such eventualities.

In the unlikely event that data becomes lost or corrupted, QGate Software Limited cannot be held responsible.

Recommended Safeguards

Perform a complete backup of any host database(s).

We highly recommend that where applicable, all remote Infor CRM databases should be fully synchronised with the main host database before any updates are performed.

Prerequisites

This guide assumes a working knowledge of Infor CRM administration and development skills, together with an established ability to use the Infor CRM Administrator and Architect modules.

For Web Client installations, this guide assumes a working knowledge of the Infor CRM Application Architect.

In addition to the intelli-CTi Client Workstation requirements listed in the **intelli-CTi – Installation and Configuration Guide**, the following items are required:

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/sysregs/

- Additional client specific settings are detailed on page 35.

Important Note: If you are upgrading from a previous installation of intelli-CTi for Infor CRM, see *Upgrading intelli-CTi for Infor CRM* on page 40 for important upgrade information.

intelli-CTi for Infor CRM LAN Bundles

To successfully integrate intelli-CTi with the Infor CRM LAN Client, you will require the intelli-CTi for Infor CRM set of Bundles.

These can be found on your intelli-CTi for Infor CRM Installation Package (under the **Application Support\Infor CRM\Infor CRM LAN Bundles** folder).

IMPORTANT NOTE: We strongly recommend applying all Infor CRM service packs and/or hot fixes if and where possible.

intelli-CTi for Infor CRM Web Bundle

To successfully integrate intelli-CTi with the Infor CRM Web Client, you will require the intelli-CTi for Infor CRM web bundle.

This can be found on your intelli-CTi for Infor CRM Installation Package (under the **Application Support\Infor CRM\Infor CRM Web Bundles** folder).

IMPORTANT NOTE: We strongly recommend applying all Infor CRM service packs and/or hot fixes if and where possible.

Installing intelli-CTi for Infor CRM

This section outlines the steps required to install and configure intelli-CTi for Infor CRM into your Infor CRM solution.

Installation Outline

The primary installation steps for installing and configuring your implementation of intelli-CTi for Infor CRM:

Step 1: (LAN + Web) Installing and Configuring Infor CRM LAN Bundles



Use the Infor CRM Administrator module to install and release the intelli-CTi for Infor CRM set of Bundles. Page 10

Step 2: (LAN only) Customising Infor CRM LAN for use with intelli-CTi



Use the Infor CRM Architect module to modify your Infor CRM plug-in components for use with intelli-CTi. Page 14

Step 3: (Web only) Customising Infor CRM Web for use with intelli-CTi



Use the Infor CRM Application Architect module to modify your Infor CRM Web components for use with intelli-CTi. Page 20

Step 4: (LAN + Web) Installing the intelli-CTi Client Application



Outlining the process of installing the intelli-CTi client application onto a user workstation. Page 24

Step 5: (LAN + Web) Installing your intelli-CTi for Infor CRM license



Outlining the process of installing the intelli-CTi client application onto a user workstation. Page 25

Step 6: (LAN only) Configuring intelli-CTi for Infor CRM



Overview/outline of the basic required elements to configuring your implementation of intelli-CTi for Infor CRM. Page 26

Step 7: (LAN + Web) Migrating Your Telephone Numbers into intelli-TNS



Outline of the process for migrating the telephone numbers of Accounts and Contacts into the new intelli-TNS telephone number management system. Page 30

Step 8: (Web only) Configuring the Infor CRM SData Service



Outline of the process required to get the Infor CRM SData service installed and running. Page 34

Step 9: (LAN + Web) Configuring intelli-CTi for Infor CRM



Outlining how to setup and configure the intelli-CTi for Infor CRM Client to communicate with your installation of Infor CRM. Page 35

Key: LAN client steps Web client steps

Step 1: (LAN + Web) Installing and Configuring Infor CRM LAN Bundles



This section applies to both LAN and Web clients.

intelli-CTi for Infor CRM requires the installation of a number of Infor CRM LAN bundles. These bundles are required for both LAN and Web installations because the LAN client will be used to configure the system, in both LAN and Web installations.

There is a list of the bundles and their purposes in the next section.

Installation of the Infor CRM Bundles should be achieved in the standard way via the Infor CRM Workgroup Administrator, applying the appropriate user access.

For assistance in applying Infor CRM Bundles, see the Infor CRM product documentation.

1.1 – Installing the intelli-CTi LAN Bundles

When installing the intelli-CTi for Infor CRM LAN Bundles, you must apply the following Bundles in the order listed below.

These can be found on your intelli-CTi for Infor CRM Installation Package (under the **Application Support\Infor CRM\Infor CRM LAN Bundles** folder).

Note: 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/

Releasing Bundles/Controlling User Access

intelli-CTi for Infor CRM provides its own user management to control access to the intelli-CTi feature set. You can release the intelli-CTi plugins to all Infor CRM users, and use the intelli-CTi user management to control who has access to intelli-CTi's features.

intelli-CTi for Infor CRM Bundles		
Order	Bundle	Type

Bundles for all Infor CRM system (all versions)

1.	intelli-CTi for Infor CRM - Database Schema.sxb	Base
2.	intelli-CTi for Infor CRM - Framework.sxb	Base
3.	intelli-CTi for Infor CRM - Solution.sxb	Base
4.	intelli-CTi for Infor CRM - Customisation.sxb Important Note: If you are upgrading an existing intelli-CTi version 3.0 (or above) installation, then this bundle should already exist and should not be replaced. Warning! – This Bundle contains the standard factory default versions of the customisable components however your system may contain modified versions of these.	Base
5.	intelli-TNS Base.sxb	Base
6.	intelli-TNS Countries Data.sxb Important Note: If you are upgrading an existing intelli-TNS version 3.0 (or above) installation, then this bundle should already exist and should not be replaced. Warning! – This Bundle contains the standard factory content of TNS country definitions. If you have modified your TNS country definitions then installing this Bundle will overwrite your changes.	Base

Bundles for Infor CRM version 7.x (and above) only

7a	intelli-CTi Components for Slx v7.x.sxb	Base
----	---	------

Bundles for Infor CRM version 8.x (and above) only

7b	intelli-CTi Components for Slx v8.x.sxb	Base
----	---	------

intelli-CTi Bundle Content and Purpose

The following table outlines the content and purpose of the intelli-CTi for Infor CRM Bundles:

intelli-CTi Bundles and Content	
Bundle	Content/Purpose
Database Schema	This Bundle contains the database schema tables that support the intelli-CTi for Infor CRM solution.
CTI Framework	This Bundle contains the CTI Framework components.
CTI Solution	This Bundle contains the CTI Solution components.
CTI Customisations	<p>This bundle contains customisable components of the CTI application.</p> <p>Important Note: If you are upgrading an existing intelli-CTi version 3.0 (or above) installation, then this bundle should already exist and should not be replaced.</p>
intelli-TNS Base	This Bundle contains the intelli Telephone Number Support (TNS) components, used to manage the capture of telephone numbers in Infor CRM.
intelli-TNS Countries Data	<p>This bundle contains intelli-TNS country definitions and dialing code information for intelli-TNS.</p> <p>Important Note: If you are upgrading an existing intelli-TNS version 3.0 (or above) installation, then this bundle should already exist and should not be replaced.</p> <p>Warning! – This Bundle contains the standard factory content of TNS country definitions. If you have modified your TNS country definitions then installing this Bundle will overwrite your changes.</p>
Components for Slx v7.x	<p>This Bundle contains elements of the intelli-CTi for Infor CRM solution that are only applicable/required for Infor CRM version 7.x (and above) installations.</p> <p>This Bundle should only be installed on Infor CRM version 7.x (or above) systems.</p> <p>At the time of writing this Bundle contained the intelli-CTi Slx toolbar (grouped).</p>
Components for Slx v8 (and above)	<p>This Bundle contains elements of the intelli-CTi for Infor CRM solution that are only applicable/required for Infor CRM version 8.x (and above) installations.</p> <p>This Bundle should only be installed on Infor CRM version 8.x (or above) systems.</p> <p>At the time of writing this Bundle contained the intelli-CTi Slx toolbar (grouped).</p>

1.2 – Infor CRM Navigation Toolbar Groups

If you are using Infor CRM version 7 (or above), this version of Infor CRM introduced the concept of Navigation Toolbar groups, which provides logical grouping of navigation bar icons.

intelli-CTi provides a Navigation Toolbar in the format of groups to match that of the standard default Infor CRM version 7 Toolbar format (e.g. Sales, Marketing, Service and Support).

This format is based upon the standard Infor CRM default set of groups. If however this default does not match your navigation toolbar groupings, this section outlines how to change this plug-in to reflect your navigation group set.

To customise the intelli-CTi for Infor CRM Grouped Navigation Toolbar, perform the following steps.

1. Using the Infor CRM Architect module, open the following plug-in:
 - intelli-CTi Framework: intelli CTI Toolbar
2. This action will present the following Infor CRM Toolbar Strip plug-in.

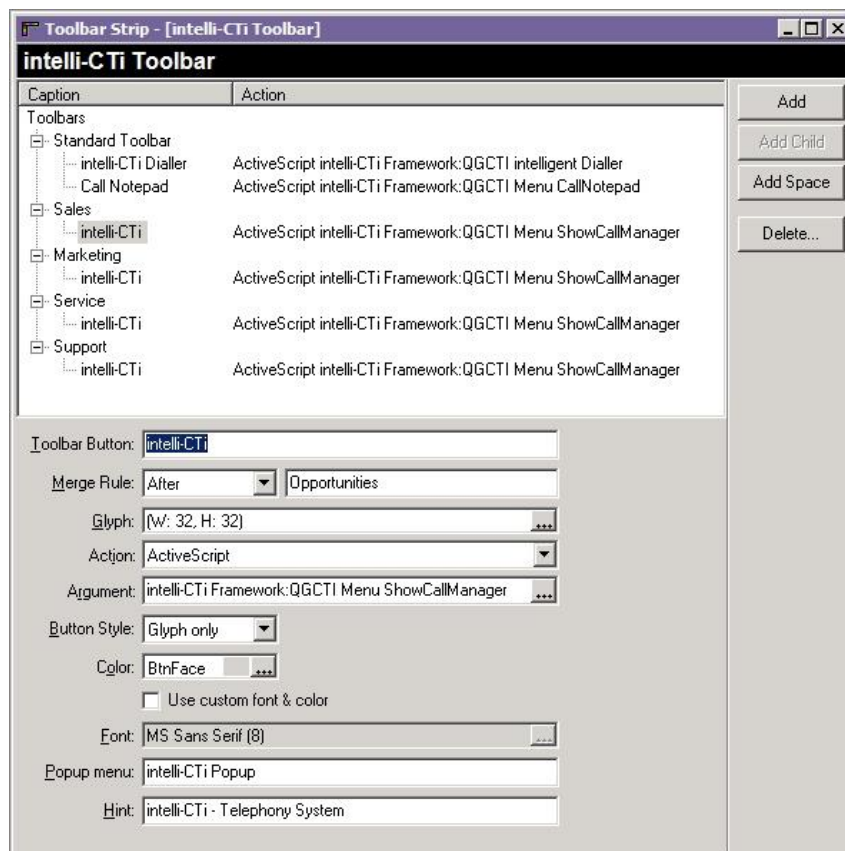


Figure 1 – Infor CRM Toolbar Strip Editor

3. To remove the intelli-CTi icon from any of the listed toolbar groups, simply select it and click the **Delete...** button.
4. To include the intelli-CTi icon into a new group name of your own, locate the name of the group from your own version of the Infor CRM Toolbar plug-in and rename the entry in the intelli-CTi Toolbar plug-in (e.g. rename the 'Marketing' entry to 'Tele-Sales').
5. Once satisfied of the new toolbar group configuration, save and release this plug-in as appropriate.

Completing the Installation

You have now successfully completed the installation phase of intelli-CTi for Infor CRM.

At this time you are now ready to begin customising your installation – see the next section.

Step 2: (LAN only) Customising Infor CRM LAN for use with intelli-CTi



The steps in this section are not required if you are only installing intelli-CTi for the Infor CRM Web Client.

This section outlines the modifications required to your Infor CRM solution to support intelli-CTi for Infor CRM integration.

intelli-TNS (Telephone Number Support) is an additional component of intelli-CTi which provides enhanced management of telephone numbers and telephone number capture from within Infor CRM. intelli-TNS ensures your telephone numbers are always captured appropriately and in the correct format.

The use of intelli-TNS ensures that outbound telephone numbers are always dialed correctly, and that inbound telephone numbers are best matched against your Infor CRM Accounts and Contacts.

Implementing intelli-TNS Support into Account and Contact Detail Views

This section outlines the required steps for implementing intelli-TNS support into your Infor CRM Detail Views (e.g. Account and Contact Detail Views).

The purpose of including intelli-TNS support into your Infor CRM Detail Views is to enable intelli-TNS to manage the capturing and changing of Account and Contact telephone numbers.

Note: intelli-TNS does not support the management of telephone numbers for Infor CRM Leads; however intelli-TNS does provide data migration support during the Lead conversion process (see sections below).

The following steps require the use of the Infor CRM Architect – please open the Infor CRM Architect on the database you wish to modify.

Implementation Steps

Perform the following steps to implement intelli-TNS into your Account and Contact detail views.

- Open your Account and/or Contact Details View that you wish to modify.
- Open the following intelli-TNS template plug-in:
 - intelli-TNS: TNS Controls Template

Form Control Changes

The first step is to replace the existing standard Infor CRM telephone number fields. For the purpose of illustration, this example outlines changing the standard Infor CRM Contact Detail view, however the same approach applies to the Account Detail view.

1. For ease of operations we advise you to temporarily increase the design size of your detail view, as this will ensure copy and paste operations are made easier. To achieve this drag the base of the hashed outline box that surrounds your detailed view.
2. From the form's Design tab, select (lasso) all of the existing standard Infor CRM telephone field Textbox controls (including their label buttons) and delete them.

The screenshot shows a form with five rows of telephone number fields. Each row consists of a label on the left and a text input box on the right. The labels are 'Work:', 'Mobile:', 'Fax:', 'Home:', and 'Other:'. The input boxes are empty and have a standard Windows-style border.

Figure 2 – Original Telephone Number Fields on Contact Detail Form

Important Consideration: If you have added any custom business logic (code) referencing the standard Infor CRM telephone field controls, then you may simply wish to move and hide these controls.

At the time of writing standard Infor CRM code did not reference these controls.

- From the intelli-TNS template form, select (lasso) ALL the TNS number field controls (including the labels and buttons) from the appropriate section of the template form (e.g. Account or Contact) dependent upon the detail view you are defining.

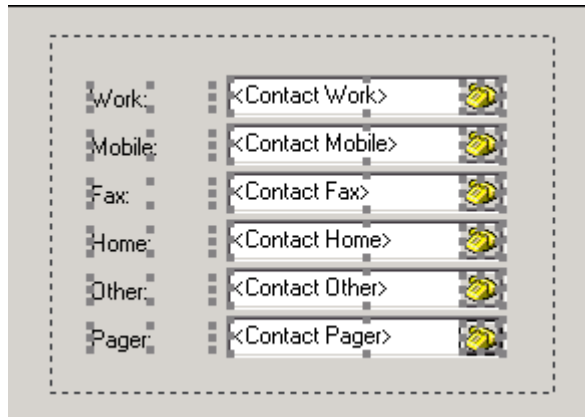


Figure 3 – intelli-TNS telephone number controls

Note: If you do not wish to include all the TNS telephone numbers types on your detail view these can be removed later.

- Having selected ALL the TNS number fields (for your view type) on the template form, right-click on the selected items and select 'Copy' from the popup menu.
- Switch to your intended detail view (e.g. Contact in this example) and select the area in which you wish your TNS telephone number fields to reside, right-click and select 'Paste' from the popup menu.
- This action will paste the entire collection of TNS number controls onto your detail view, however their intended location may need to be adjusted to suit your layout.

Important Note: Do not place your intelli-TNS number fields into or onto a Panel control. Due to the complex operations of the intelli-TNS number fields, the events that control the field's behaviour can be seriously affected by placing them within a Panel control. The symptoms of doing so will result in the TNS fields not populating their content correctly and not correctly refreshing after edits.

Although every effort has been made to overcome this limitation, currently due to the limitations of the Infor CRM control sets no solution yet exists.

- You may at this time remove any TNS number controls that you do not require on your detail views.
- After removing any unwanted TNS number controls you may wish to review the new TNS controls tab order sequence within your detail view.

Note: By default the TNS number label (button) controls are defined with their TabStop property disabled (i.e. do not include in tab key sequence).

- Do not rename any of the TNS number controls in either the template or your detail views, as this will prevent these controls from working.
- After any final layout adjustments to your detail view(s), remember to re-adjust the form's hashed outline box (expanded in step 1) to closely encapsulate the final set of controls.

Script Code Page Changes

Switch to the Script Tab (code page) of your Account and/or Contact Detail views and Click the 'Include Script' button, this will display the included script pane to the right of the code page.

11. From this pane remove the following Plug-ins (where applicable):

- System: SLX CTI Support
- System: QGate CTI Support (if this was included from a previous version).

12. Include the following intelli-TNS library (Script Plug-in):

- intelli-TNS: TNS Library

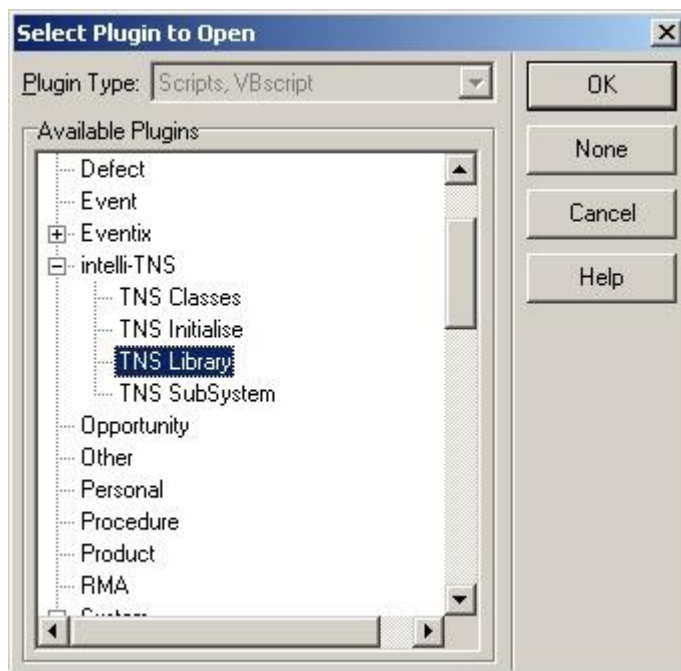


Figure 4 - intelli-CTi for Infor CRM – Select Plugin to Open Window

Coding intelli-TNS Support

Once you have included the intelli-TNS Library, the final step is to add code into your detail view to initialise the TNS number controls.

Locate the following function (event handler) within the code page of your Account or Contact detail view:

AXFormChange

Add the following code snippet to the base of this function (event handler) – see the sample outline listed below. N.B. This code snippet is included on the code page of the intelli-TNS template form so that you can copy and paste it from there.

```
' *****
' intelli-TNS Telephone Field Support.
' *****
TNSNumberFieldInitialiseControls Sender, Application.MainViews.ActiveView.CurrentID
```


The following sample code shown below shows the general outline of the function/event handler (blurred) and the additional TNS code at the base of the function. This example has been taken from the Contact Detail form. The code in the blurred area for the Account Detail form will be slightly different.

```
Sub AKFormChange(Sender)
    Dim strAddress, strAddressDesc

    On Error Resume Next
    If Application.MainViews.ActiveView.CurrentID = "" Then Exit Sub

    qStrContAddressID = txtAddressID.Text
    mnuAddress.Items.Clear

    GetDisplayAddress objBasic.GlobalInfoExists("SLXAddressDescription"), _
        "CONTACT", "CONTACTID", txtAddressID.Text, _
        strAddress, strAddressDesc 'OKL

    mnuAddress.Text = strAddress
    lblCurrentAddress.Caption = strAddressDesc

    qStrContact = nedContact.Text 'Save the Contact name
    SetSollicitFlags

    On Error Goto 0

    ' *****
    ' intelli-TNS Telephone Field Support.
    ' *****

    TNSNumberFieldInitialiseControls Sender, Application.MainViews.ActiveView.CurrentID

End Sub
```

Figure 5 - intelli-TNS Number Support – Code Snippet

The TNS function being called is provided by the included intelli-TNS library (Script plug-in) you included in step 12.

13. Repeat the above process for each of your Account and Contact Detail views.
14. Save and release your updated detail views.

Implementing intelli-TNS Support into Infor CRM Add Account/Contact Process

If you are using the standard Infor CRM Add New Account/Contact screen when adding new Accounts and Contacts to your Infor CRM system, then you will need to incorporate intelli-TNS support into this process. intelli-TNS support for this process ensures that all new Accounts and Contacts have the appropriate TNS telephone numbers defined.

This section outlines the required steps for implementing intelli-TNS support into the standard Infor CRM Add Account/Contact process.

PowerEntry Users: If your system is using QGate PowerEntry for data capture in place of the standard Infor CRM process, then you do not need to implement this step. PowerEntry automatically detects and supports intelli-TNS.

Using the Infor CRM Architect, Open the following plug-in component:

(Using the Manage Plugins dialog, locate the Infor CRM plug-in or any customised version you may have):

- System: Add New Contact Account

From within the "Add New Contact Account" form plug-in (VB code page) apply the following changes:

1. Include the following libraries (Script Plug-in):
 - intelli-TNS: TNS Library

2. Locate the subroutine 'SaveContactAccountDetails' and add the following code snippet to the base of the routine (before the End Sub):

```
' *****
' intelli-TNS Support: Capture new Contact/Account Numbers...
' *****
' Capture new Contact numbers (if applicable)
TNSAddContactNumbers gStrContactID, True
' Capture new Account numbers (if applicable)
TNSAddAccountNumbers gStrAccountID, True
```

The following outlines the standard Infor CRM function (SaveContactAccountDetails), including the additional TNS code embedded.

```
'Insert the new Addresses
Set objRS = AddAddressRecordsToRS(gObjConAddrRS, GetPortableAddressRS, False)
Set objRS = AddAddressRecordsToRS(gObjAccAddrRS, objRS, False)
If objRS.RecordCount > 0 Then
    objRS.UpdateBatch
End If
objRS.Close
Set objRS = Nothing

' *****
' intelli-TNS Support: Capture new Contact/Account Numbers...
' *****
' Capture new Contact numbers (if applicable)
TNSAddContactNumbers gStrContactID, True
' Capture new Account numbers (if applicable)
TNSAddAccountNumbers gStrAccountID, True
End Sub
```

Figure 6 - intelli-CTi for Infor CRM – Add New Contact/Account TNS Support

- The Boolean parameter placed at the end of the TNS function denotes if you wish the TNS number capture process to provide user-interaction.

If set to True, should the TNS telephone number parser not successfully convert a telephone number, then the TNS number edit window will appear prompting the user to manually correct the number.
- Save and release your revised “Add New Contact Account” form plug-in.

Important Note: During future upgrades of Infor CRM, ensure that the “Add New Contact Account” plug-in does not get replaced with an updated version. If this should occur, re-apply the above listed changes to the updated plug-in.

Implementing intelli-CTi/TNS Support into Infor CRM Lead Conversion Process

If you are using the Infor CRM Leads facility, then it is an important consideration to include intelli-CTi and intelli-TNS support into the Lead conversion process. This ensures that all converted Leads have appropriate TNS telephone number entries, and any converted Leads with intelli-CTi call history is migrated into their new respective Account and Contact records.

Using the Infor CRM Architect, Open the following plug-in component:

(Using the Manage Plugins dialog, locate the Infor CRM plug-in or any customised version you may have):

- System: Convert Lead

From within the “Convert Lead” form plug-in (VB code page) apply the following changes:

1. Include the following libraries (Script Plug-in):

- intelli-TNS: TNS Library
- intelli-CTi: CTi Library

2. Locate the subroutine (event handler) ‘cmdConvertClick’ and add the following code snippet to the base of the routine (before the End Sub):

```
' *****
' Integration with intelli-CTi/intelli-TNS
' Lead Conversion Process
' *****
' Convert Lead Call History into Account/Contact Call History
CTILeLeadConvert objLI.CurrentLeadID, strNewAccountID, strNewContactID

' Convert Lead Telephone Numbers into intelli-TNS Telephone Numbers
TNSLeadConvert strNewAccountID, strNewContactID, True
' *****
```

The following outlines the standard Infor CRM function (cmdConvertClick), including the additional intelli-CTi/TNS code imbedded.

```
If IsError(strErr) Then
    ShowError(LocalizeFmt("There was an unexpected error converting the Lead.
End If
Set objSLXDB = Nothing

' *****
' Integration with intelli-CTi/intelli-TNS
' Lead Conversion Process
' *****
' Convert Lead Call History into Account/Contact Call History
CTILeLeadConvert objLI.CurrentLeadID, strNewAccountID, strNewContactID

' Convert Lead Telephone Numbers into intelli-TNS Telephone Numbers
TNSLeadConvert strNewAccountID, strNewContactID, True
' *****

End Sub
```

Figure 7 - intelli-CTi for Infor CRM – Convert Lead

- Note the parameters to the TNS LeadConvert functions include the IDs of the existing lead and new Account and Contact.
- The Boolean parameter placed at the end of the TNSLeadConvert function denotes if you wish the TNS conversion of telephone numbers to be user-interactive.

If set to True, should the TNS telephone number parser not successfully convert a telephone number, then the TNS number edit window will appear prompting the user to manually correct the number.

- Save and release your revised “Convert Lead” form plug-in.

Important Note: During future upgrades of Infor CRM, ensure that the “Convert Lead” plug-in does not get replaced with an updated version. If this should occur, re-apply the above listed changes to the updated plug-in.

Step 3: (Web only) Customising Infor CRM Web for use with intelli-CTi



The steps in this section are not required if you are only installing intelli-CTi for the Infor CRM LAN Client.

Most of the changes that need to be applied to the Infor CRM Web client are contained in a Infor CRM web bundle. The web bundle can be found on your intelli-CTi for Infor CRM Installation Package under the **Application Support\Infor CRM\Infor CRM Web Bundles** directory.

There are also other changes that must be applied manually, as explained below.

Installing the bundle

The following instructions assume that you are familiar with the Infor CRM Application Architect. At the least, you should check the following items before applying the bundle and making other changes:

- Make sure you have a recent backup of your database.
- Make sure that you are using the correct project within Application Architect.
- Make sure that the Application Architect project is an up-to-date reflection of your web site. Preferably the existing web site should have been built from the project you are about to use.

Once you are happy that you have the correct environment ready, proceed as follows:

1. Copy the web bundle (**intelli-CTi for Infor CRM Web (vx.y.z).zip**) from your intelli-CTi for Infor CRM Installation Package into the root of your C drive, or somewhere else that has a short path name. Application Architect will not be able to process the bundle if the path name is too long.
2. Open up the **Infor CRM Application Architect** and select the web project.
3. Right-click the root of the tree in the Project Explorer and select to **Install Bundle**. (If you are installing in Infor CRM version 8 then click Yes if you are prompted to upgrade the bundle).
4. Navigate to the intelli-CTi for Infor CRM Web.zip bundle and click [Open].
5. Follow the instructions on screen to complete the bundle installation.

Change Telephone Fields for Account and Contact Detail Pages

The telephone number fields on the standard Infor CRM detail pages can interfere with how intelli-TNS formats telephone numbers. To resolve this we will change them from a control type of **Phone** to a control type of **TextBox**.

1. Using the Project Explorer in the Application Architect, find the AccountDetails and ContactDetails forms:

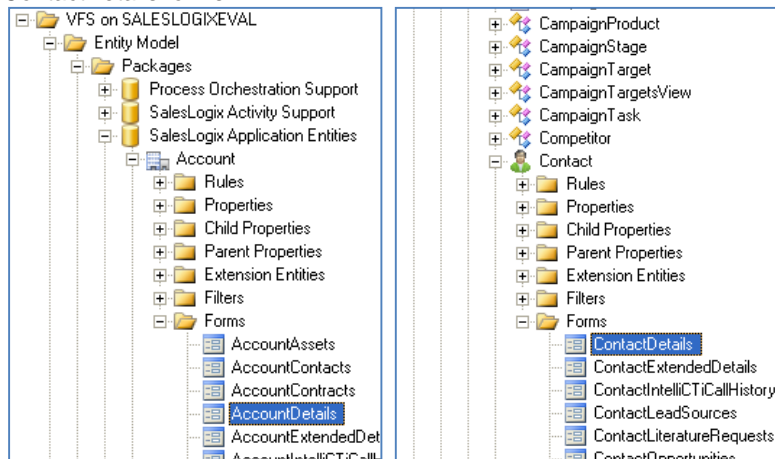


Figure 8 – Account and Contact details forms

2. Right-click the first telephone number field and choose **Change Control Type > Editors > TextBox** from the menu.
3. Repeat Step #2 for all telephone number fields.

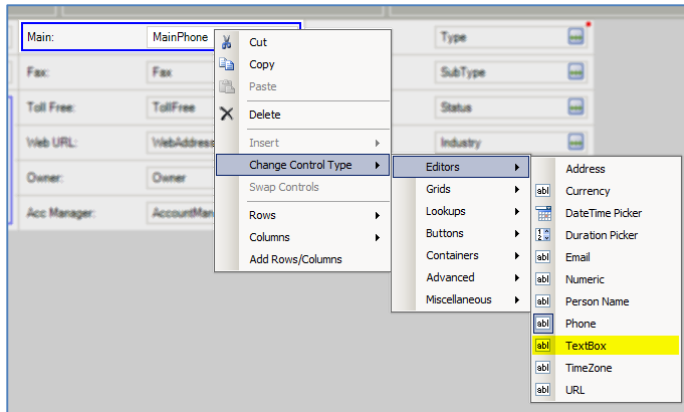


Figure 9 – Updating the control type on a form

4. Save the form.
5. Repeat these steps for the ContactDetails form.

Change Telephone Fields for “Insert Contact/Account” page

A similar change may also be required for the “Insert Contact/Account” Smart Part. The steps to achieve this are as follows:

1. Using the Project Explorer in the Application Architect, navigate to:
 - **Portal Manager > SlxClient > Pages**
2. Open the **Insert Contact/Account** page.
3. Select **InsertContact** from the list of Smart Parts.
4. Now click **[Edit]** to open the Smart Part code editor.

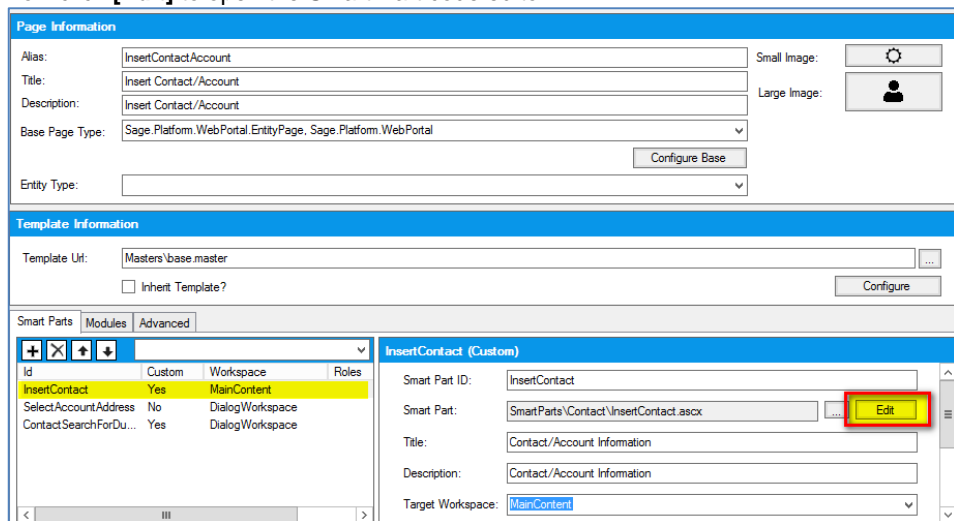


Figure 10 – Editing the “InsertContact” Smart Part code

5. Now left-click anywhere in the script and use the keyboard shortcut CTRL+F to bring up the Find/Replace dialog and enter the following values:
 - Find what: **SalesLogix:Phone**
 - Replace with: **asp:TextBox**

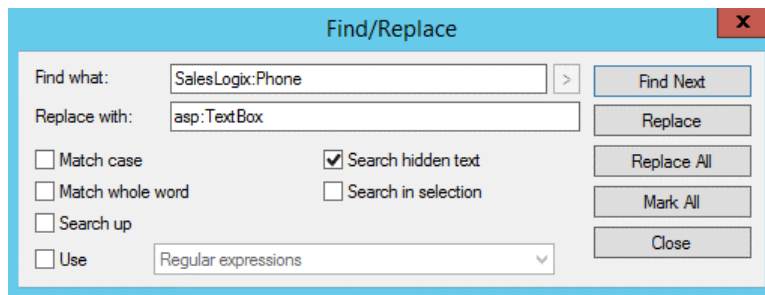


Figure 11 – Find/Replace all instances of Phone controls for TextBox

6. Now click the [Replace All] button, which will tell you how many occurrences there were.
7. Finally close the Find/Replace dialog.

Important Note: During future upgrades of Infor CRM, these manual customisations may be overwritten with out-of-the-box versions from Infor. If this should occur, re-apply the above listed changes to the affected items.

Install the TNS Utilities Library

The TNS Utilities Library is required by the C# code snippets added to the Account and Contact events. To make it available to these snippets, please copy the file

QGate.IntelliCti.Tns.TnsUtilities.dll into the folder

C:\Program Files\Saleslogix\SupportFiles

You can find the QGate.IntelliCti.Tns.TnsUtilities.dll file in the **Application Support\Infor CRM\Infor CRM Web Bundles** directory of your intelli-CTi for Infor CRM Installation Package.

N.B. This assumes that Infor CRM is installed in the standard location.

Build and deploy your Infor CRM web site

Once you have finished making all the customisations, build and deploy the **slxclient** and **sdata** portals according to your normal internal procedures.

Step 4: (LAN + Web) Installing the intelli-CTi Client Application



This section applies to both LAN and Web clients.

This section outlines the steps required to install the intelli-CTi client application, required before performing the next steps in the installation/configuration process.

This step will install the intelli-CTi Client application and integration components for Infor CRM.

Important Note

This installation step should be performed upon a client workstation that will be used to perform the configuration of intelli-CTi and intelli-CTi for Infor CRM. This should not ideally be the Infor CRM server or database server.

Performing the Client Installation

Located in the **Setup** directory of your intelli-CTi for Infor CRM Installation Package you will find an installation setup program (**intelli-CTi for Infor CRM - Client Setup.exe**).

Run this program and follow the on screen prompts.

For more detailed information on installing the intelli-CTi application, see the *intelli-CTi Installation and Configuration Guide*

(located in the **Documents** directory of the intelli-CTi for Infor CRM Installation Package).

Step 5: (LAN + Web) Installing your intelli-CTi for Infor CRM license



This section applies to both LAN and Web clients.

To administer your intelli-CTi for Infor CRM System settings, using the Infor CRM Sales Client application log into the Host database using the **Admin** login.

From the Tools menu, select Manage, intelli-CTi System Settings...

The intelli-CTi for Infor CRM - System Administration window will be displayed.

Installing Your Licence

If you do not yet have a licence; please contact your intelli-CTi for Infor CRM software supplier, quoting your Infor CRM Version and Customer ID. However, if you are running a demo version of Infor CRM, you do not need to install a licence and you can skip this step.

Once you have your licence; go to the licence tab of the **intelli-CTi for Infor CRM - System Administration** window:

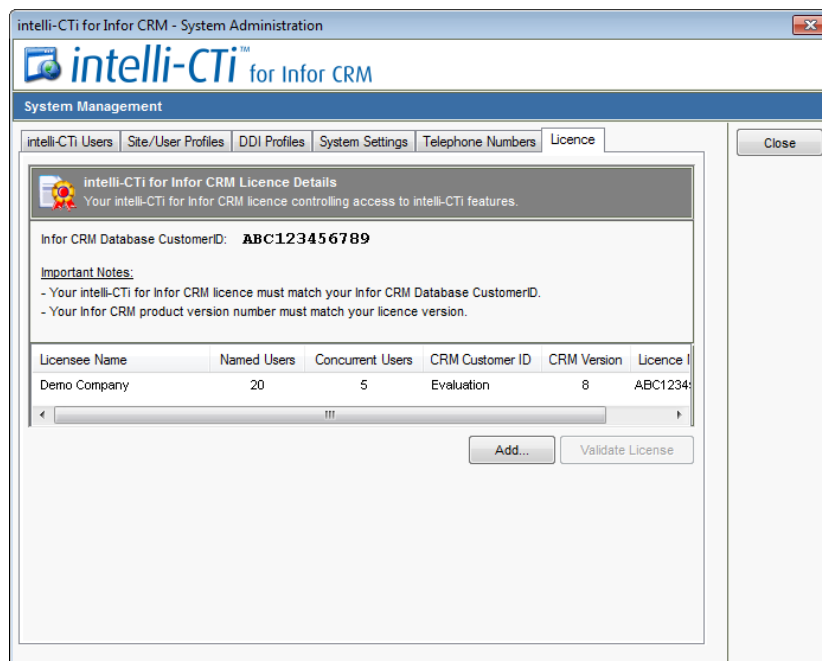


Figure 12 – intelli-CTi for Infor CRM – System Administration Window

Click the **Add...** button and select your intelli-CTi for Infor CRM licence file. Your licence details will be displayed in the window as above.

Click the **Validate License** button to make sure that the licence has been loaded correctly.

intelli-CTi for Infor CRM Licence

The intelli-CTi for Infor CRM integration requires a licence to be applied to your implementation of intelli-CTi with Infor CRM.

This licence is coded to the specific Infor CRM database Customer ID as defined and allocated by Swiftpage. These two values must match for the licence validation process to succeed.

The intelli-CTi for Infor CRM licence also controls the number of Infor CRM users that can access the feature set of intelli-CTi within Infor CRM.

Step 6: (LAN only) Configuring intelli-CTi for Infor CRM



The steps in this section are not required if you are only installing intelli-CTi for the Infor CRM Web Client.

intelli-CTi for Infor CRM is a fully open system providing the ability to customise your implementation to suit the individual needs of your business and Infor CRM users.

The features and options of intelli-CTi for Infor CRM can be easily managed from the intelli-CTi System Settings/Systems Administration screens, contained within your Infor CRM Application.

These feature/options include:

- Telephone call notifications (screen-popping)
- Call flow processing
- Call wrap-up management
- Call logging
- International dial settings
- Synchronisation settings
- Telephone Number Support (intelli-TNS)

For more detailed information on configuring intelli-CTi System settings, see the *intelli-CTi for Infor CRM User/Administrator Guide (Administration Section)*.

Administering intelli-CTi for Infor CRM Settings

Note: To achieve this step, you must have first completed the following:

- Installation of the intelli-CTi for Infor CRM Bundles (Step 1)
- Installation of the intelli-CTi Client Application (Step 3)

To administer your intelli-CTi for Infor CRM System settings, using the Infor CRM Sales Client application log into the Host database using the **Admin** login.

From the Tools menu, select Manage, intelli-CTi System Settings...

The intelli-CTi for Infor CRM - System Administration window will be displayed.

Configuring User Access

On the intelli-CTi Users tab of the **intelli-CTi for Infor CRM - System Administration** window, click the **Manage Users...** button. The Manage intelli-CTi Users window will be displayed:

The intelli-CTi Manage Users window defines which Infor CRM users have access to the intelli-CTi for Infor CRM feature set.

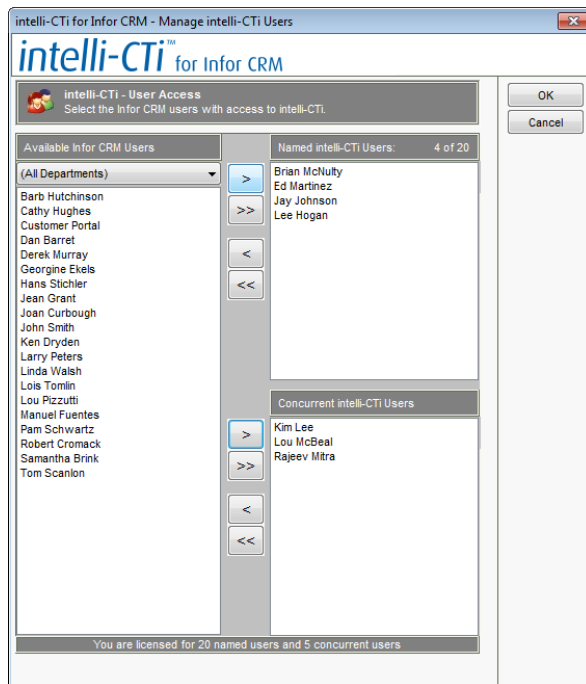


Figure 13 – intelli-CTi for Infor CRM – Manage intelli-CTi Users Window

You can grant users access to intelli-CTi by selecting them and clicking on the left or right arrow buttons and adding them either as **Named Users** or as **Concurrent Users**.

- You can add as many Named Users as your licence permits.
- You can add any number of Concurrent Users, but only the number you are licensed for can access the intelli-CTi feature set at any given time.
- The Infor CRM administrator account (admin) automatically has access to intelli-CTi and does not require granted access.
- Only granted users listed within this section will have access to intelli-CTi for Infor CRM features. If a user is unable to access any of the features of intelli-CTi, check their access has been granted.

For more detailed information on defining intelli-CTi users, see the intelli-CTi for Infor CRM User/Administrator Guide (Administration Section).

Site/User Profiles

intelli-CTi for Infor CRM is an extensively configurable system allowing Infor CRM systems administrators to configure the behaviour of the systems for each Infor CRM site location and each individual Infor CRM user (if required).

intelli-CTi configuration is managed through intelli-CTi Sites and User Profiles.

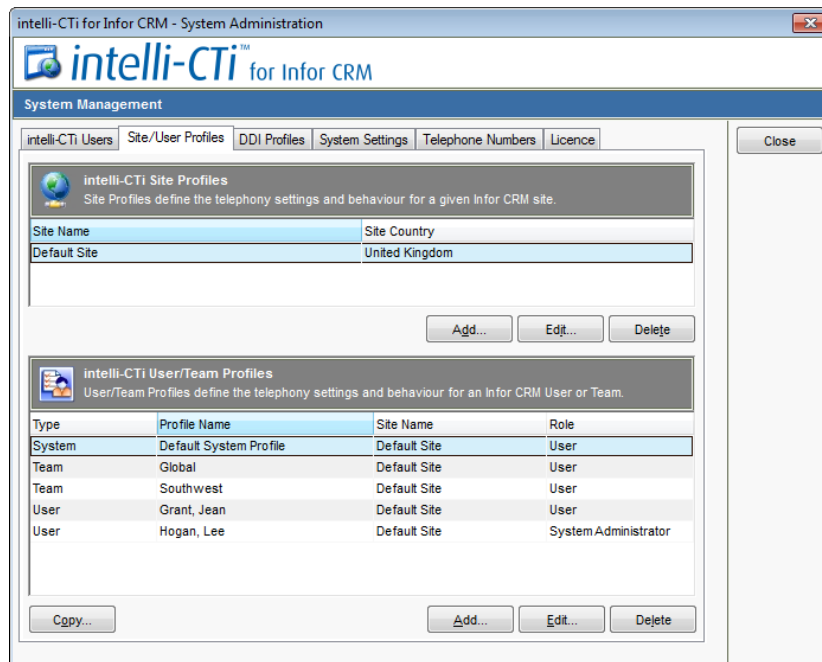


Figure 14 - intelli-CTi for Infor CRM - System Administration Window

The Site/User Profiles tab provides the means of:

- Adding, editing and deleting Site Profiles
- Adding, editing, deleting and copying User/Team Profiles

Site Profiles – Overview

intelli-CTi Site Profiles contain intelli-CTi telephony settings information for a particular site location.

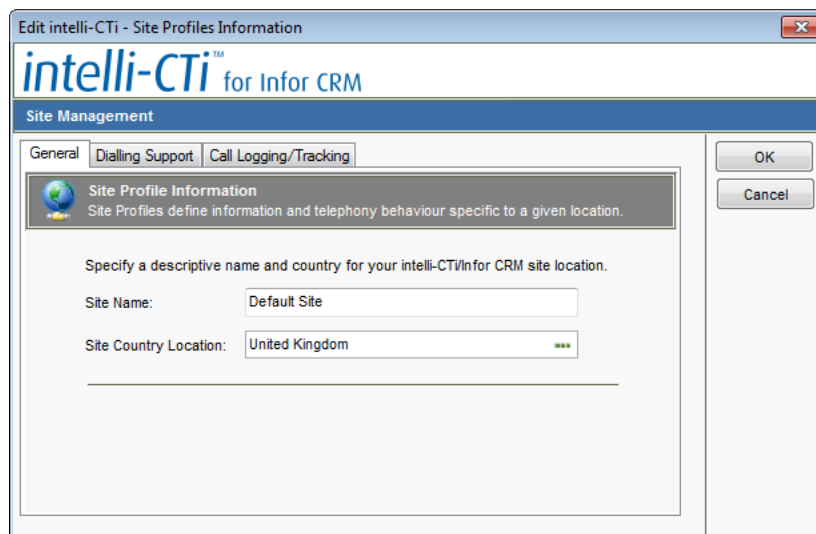


Figure 15 - intelli-CTi for Infor CRM - Site Profile Window

For more detailed information on defining intelli-CTi Site Profiles, see the *intelli-CTi for Infor CRM User/Administrator Guide (Administration Section)*.

User/Team Profiles – Overview

intelli-CTi User/Team Profiles contain User/Team settings and preferences for a particular User, Team and/or Infor CRM system.

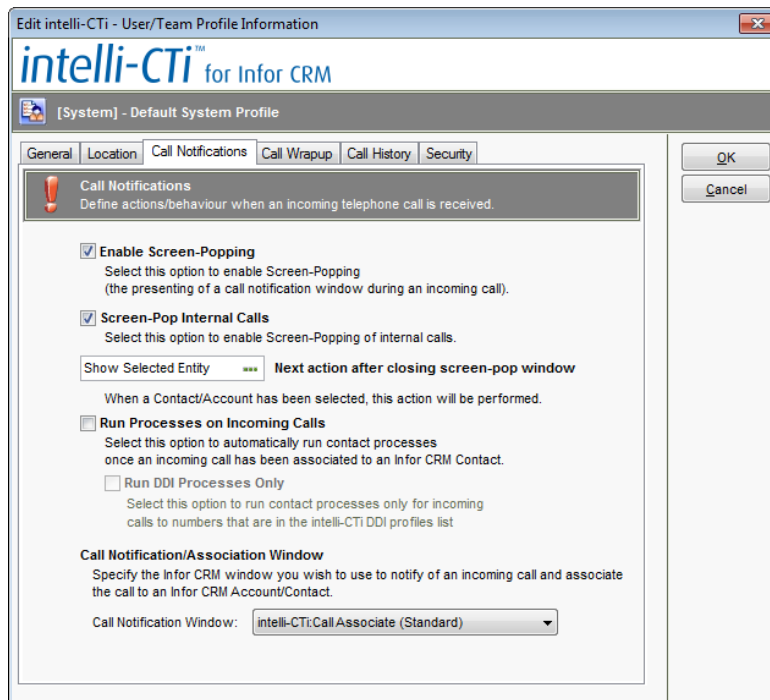


Figure 16 - intelli-CTi for Infor CRM - User/Team Profile Window

For more detailed information on defining intelli-CTi User/Team Profiles, see the *intelli-CTi for Infor CRM User/Administrator Guide (Administration Section)*.

Step 7: (LAN + Web) Migrating Your Telephone Numbers into intelli-TNS



This section applies to both LAN and Web clients.

Telephone Number Support (intelli-TNS) is a feature of intelli-CTi for Infor CRM, which provides extensive support for recording and managing telephone numbers for an Account and Contact.

intelli-TNS also enforces disciplines on telephone number formats, storing them in a uniform collection of formats for both inbound CLI recognition and outbound dialing purposes.

For intelli-CTi to correctly dial telephone numbers and recognise incoming callers you will need to migrate the telephone numbers of all your existing Infor CRM Contacts and Accounts into the intelli-TNS format.

Important notice for Remote Systems

If you have any Infor CRM Remote Office systems or Remote Client systems, then you will need to carefully manage the telephone number migration process. When you run the telephone number migration wizard, it will generate a considerable amount of Infor CRM synchronisation data. You should ensure that your systems and networks are able to fully synchronise in the time you have available.

If you require assistance with managing this process, please contact QGate technical support (See page 41).

Pre-Migration Steps

Before you migrate your existing telephone number data, there are a number of configuration options that should be defined. These are options that, when changed, only affect future updates of data in the database.

If you change them before you migrate your data, then the migrated data will reflect your new settings. If you change them afterwards, then data that has already been migrated will not be updated to reflect the new settings.

1. Open up the **intelli-TNS System Settings** window from the **Tools, Manage** menu.
2. On the **TNS System Settings** tab, select your Default Country from the drop down list.

This value is very important and is used by intelli-TNS to perform telephone number management when a country value cannot be derived from an Account or Contact's address information.

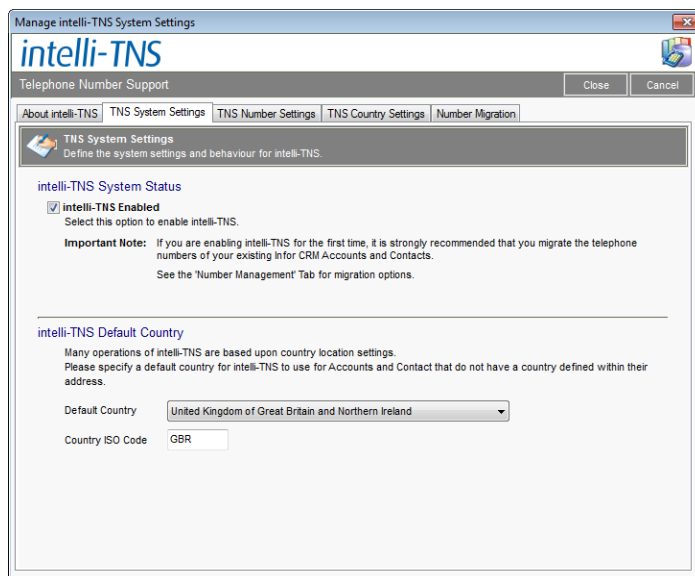


Figure 17 – Manage intelli-TNS System Settings Window

3. Check the intelli-TNS Enabled box – this enables the intelli-TNS system.
4. On the **TNS Country Settings** tab, click the **Manage Countries...** button.

Figure 18 – Manage intelli-TNS Countries Window

5. If you would like the country code to be included in telephone numbers that are stored in the Infor CRM Account and Contact tables, then check the **Record Country Code in Account/Contact** box for each country where you would like this activated.

Note: This only affects data in the standard Infor CRM database tables. intelli-TNS uses the **Display Country Code** option when dynamically displaying telephone numbers to the user. The **Display Country Code** option can be changed at any time and takes effect immediately.

6. Review all the intelli-TNS countries which are relevant to the content of your Infor CRM Accounts and Contacts, to ensure each countries telephone number definitions are defined how you would like them to be.
7. Click OK to save and exit the intelli-TNS Countries management screen.

Migrating Your Telephone Number Data

Once the necessary configuration options have been set, you are now ready to migrate your Accounts and Contacts telephone number data.

To migrate your telephone numbers into intelli-TNS, run an **intelli-TNS Number Migration** as follows.

1. From the Number Migration tab on the **intelli-TNS System Settings** window, click the **intelli-TNS Migration Wizard...** button.

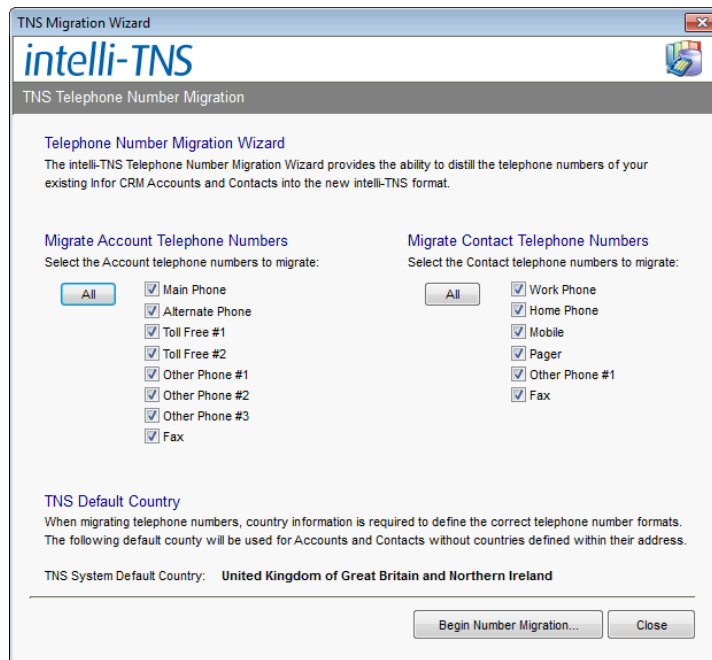


Figure 19 – TNS Migration Window

2. Select which types of telephone numbers you would like to migrate into intelli-TNS. Typical migrations migrate all telephone number types.
3. Verify that the **TNS System Default Country** is correct. This is displayed at the bottom of the screen.
4. Click the **Begin Number Migration...** button to start the number migration process – this action will display the TNS Number Migration dialog.

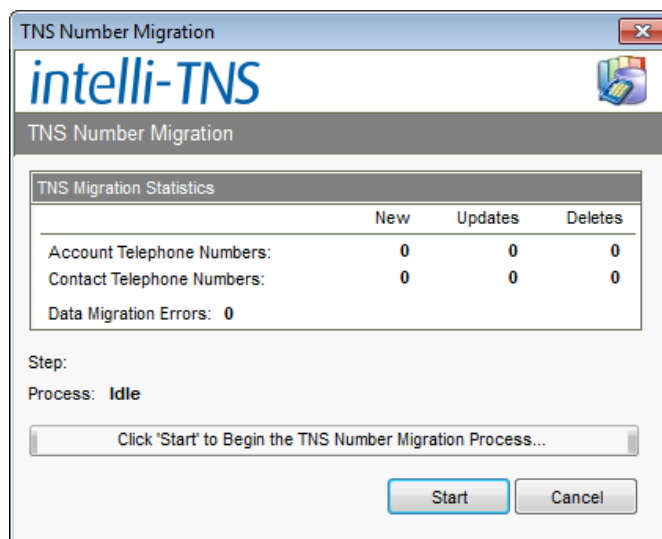


Figure 20 - intelli-CTi for Infor CRM - System Administration Window

5. Click the **Start** button to commence the number migration process.

Warning! – On large systems this process can take considerable time to complete.

6. Should you wish to cancel the number migration process at any time or should the process fail for any reason, restarting the number migration process will always continue for the previous point of cancellation/failure.

On-going intelli-TNS Telephone Number Migrations

The intelli-TNS telephone number migration process has been expressly designed to perform the number migration process progressively as an on-going process.

Thus ensuring that should your Infor CRM telephones numbers for Account and Contact records change outside of intelli-TNS support, the intelli-TNS telephone number migration process can be re-executed at any time to acknowledge and re-synchronise any such changes.

Typical scenarios where this may occur are when new Accounts and/or Contacts are imported into the system or Account and/or Contact records are updated via a database update - either process being void of the intelli-TNS number management.

Should such an event occur, re-executing the intelli-TNS number migration process post any external updates will re-synchronise intelli-TNS telephone numbers with the new data changes.

intelli-TNS number migration is able to clearly identify the following changes in telephone number data:

- Insertion of new telephone numbers
- Update of existing telephone numbers
- Removal of existing telephone numbers.

intelli-TNS Number Migration Agent

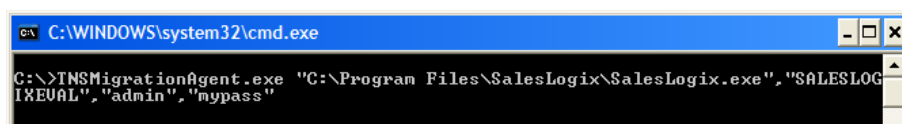
To ease the automation of intelli-TNS number migrations, intelli-TNS also provides an intelli-TNS Number Migration Agent. This agent is a standalone Microsoft Windows executable that can be run from a command-line execution to perform an automated number migration process. To run the Migration Agent, proceed as follows:

1. The intelli-TNS Number Migration Agent requires Infor CRM to be installed on the system. Make sure there is a working copy of Infor CRM on your system before proceeding.
2. Copy the **TNSMigrationAgent.exe** file onto your system from the **Application Support\Infor CRM\intelli-TNS** directory of your intelli-CTi for Infor CRM Installation Package.
3. Run the TNSMigrationAgent.exe with the following command line arguments. N.B. It is safest to enclose each argument in double quotes.

```
TNSMigrationAgent.exe "SalesLogixExecutable"
,"SalesLogixDbAlias","UserName","Password"
```

SalesLogixExecutable: Filename (including full path) of the Saleslogix.exe file.

SalesLogixDbAlias: The alias name of the Saleslogix database to connect to.



4. The Migration Agent will open up a Infor CRM window and run the TNS Number Migration process without user intervention.
5. Once you have confirmed that your command line is correct, you can add the Migration Agent to your Windows Scheduled Tasks. The Migration Agent can be run as often as is required.

Step 8: (Web only) Configuring the Infor CRM SData Service



The steps in this section are not required if you are only installing intelli-CTi for the Infor CRM LAN Client.

The Infor CRM SData service is part of the Infor CRM product. intelli-CTi connects to the SData service to access Account, Contact and telephone number data. intelli-CTi also uses the SData service to create call log data.

If SData is already enabled on your system, then you do not need to perform the actions in this section.

Test to find out if SData is working on your system

To test whether SData is working in your Infor CRM system, open a web browser window and navigate to the following URL, substituting in the server name and port number of your SData service:

`http://<servername>:port/sdata/slx/dynamic/-/accounts`

Enter the details of a valid Infor CRM user when prompted.

You should see a list of Infor CRM Accounts being displayed. The exact format of the list depends on which web browser you are using.

If you don't get any data shown, or you get a "The page cannot be found" error, then SData may not have been enabled.

Enable the Infor CRM SData Service

1. Open up the Infor CRM Application Architect.
2. Navigate to the **Configuring the SData or Process Host Portals** topic in the Application Architect's help and follow the instructions there.
3. Open the Infor CRM Administrator.
4. On the **All Users** tab, locate the **Administrator** user and double-click to open up their details.

5. Enable the Use Windows Authentication check box.
6. In the Windows ID section, click on the button that looks like this:
7. Select the user that is running the Application Pool for SData in IIS.
8. When you are shown the following window, respond **No**.

9. Click the **OK** button.

Once you have completed the steps, re-run the test to make sure that SData is working (See above).

Step 9: (LAN + Web) Configuring intelli-CTi for Infor CRM on the Client



This section applies to both LAN and Web clients.

Integration between intelli-CTi and Infor CRM is provided by the following two services running inside QGate Breeze:

1. QGate intelli-CTi for Infor CRM service
2. QGate Infor CRM Integration Service

These services are installed as part of the intelli-CTi for Infor CRM client installation process.

For information on installing and configuring intelli-CTi, see *Step 4: (LAN + Web) Installing the intelli-CTi Client Application* on page 24.

The Breeze services are responsible for providing the communication between intelli-CTi and Infor CRM (e.g. allowing Infor CRM to receive and react to telephony events such as incoming calls).

Once the intelli-CTi application is installed, this section outlines how to configure and enable the Breeze services to integrate with your Infor CRM application.

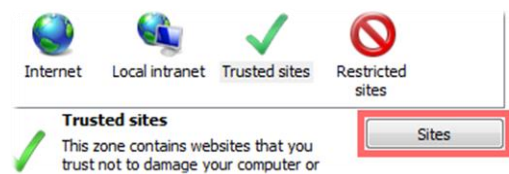
Client Integration Prerequisites (Internet Explorer)

In order for the product to function correctly, you need to ensure that the following settings are correct:

Add CRM Server URL to Trusted Sites

If you intend to use intelli-CTi with Internet Explorer, please make sure that the Infor CRM site you are connecting to has been added to the Trusted Sites.

This can be done by adding the URL to the list of "Trusted Sites" on the "Security" tab of the "Internet Options" settings screen.



Client Integration Prerequisites (Chrome)

In order for the product to function correctly, you need to ensure that the following settings are correct:

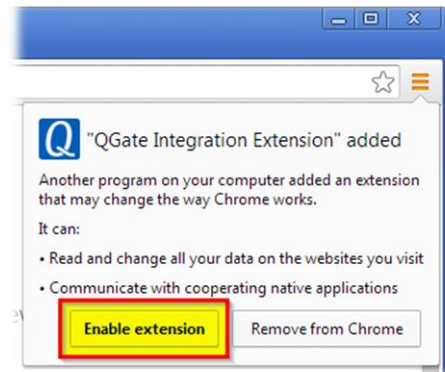
Enable QGate Integration Chrome Extension

If you intend to use intelli-CTi with Chrome, please make sure that the QGate Integration Extension has been enabled in Chrome. This can be done from the Chrome settings screen.

Disable Chrome running in the Background

By default, Chrome has the ability to remain running in the background when you close the browser (via an icon in the tray/notification area). However, this feature conflicts with our Integration Extension and must be disabled.

This can be done by right-clicking the Chrome tray icon and ensuring the "Allow Google Chrome to run in the background" is unchecked.



Enabling intelli-CTi for Infor CRM Application Integration

The configuration screens for intelli-CTi for Infor CRM Application Integration are accessed from the Windows Control Panel.



From your Windows Control Panel select the **QGate Breeze Settings** icon. This will present the QGate Breeze Configuration Window.

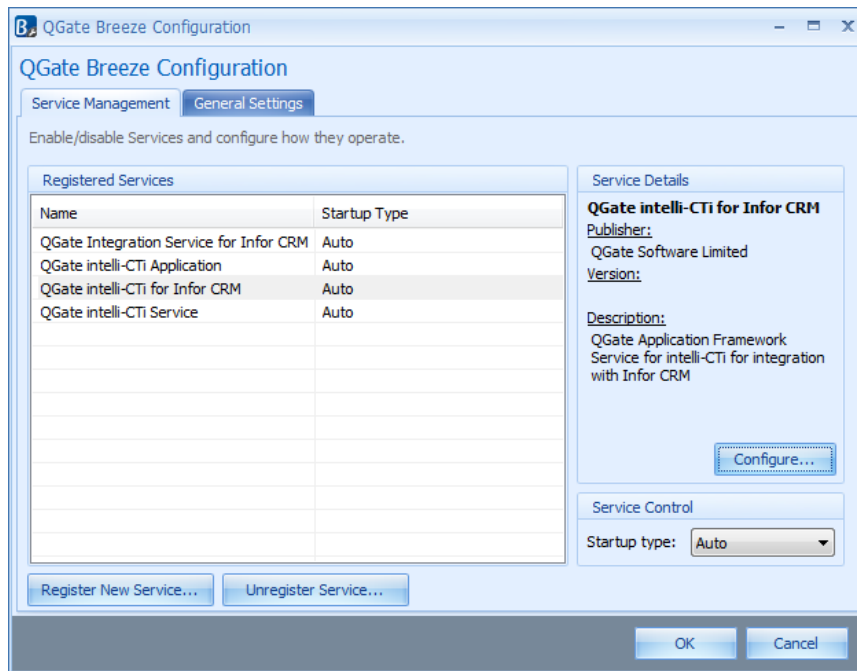


Figure 21 – QGate Breeze Configuration Window (Control Panel Applet)

Select the **QGate intelli-CTi for Infor CRM** service from the list and press the **Configure...** button.



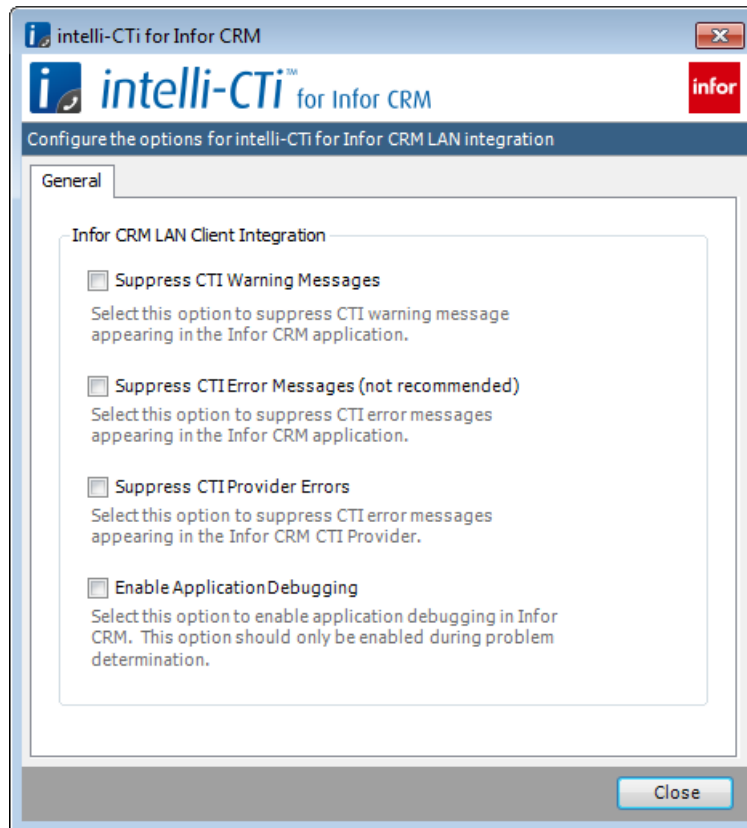
Figure 22 – intelli-CTi for Infor CRM Configuration Window

Select whether you want to integrate with the Infor CRM Web Client, the Infor CRM LAN Client or both.

Configuring integration with the LAN client

The majority of Infor CRM LAN Client Application Integration settings are configured from within the Infor CRM application (See Step 5), however there are a few options that are configured from within the control panel applet.

If you have enabled integration with the LAN client, click the **Configure LAN Client...** button.



The available options for configuration are:

Suppress CTI warning messages

Checking this option will suppress the appearance of simple warning messages (e.g. "Line Busy") within the Infor CRM Sales Client.

Suppress CTI error messages (not recommended)

Checking this option will suppress the appearance of CTI related error messages appearing in the Infor CRM Sales Client. It is not recommended to enable this option.

Suppress CTI Provider Errors

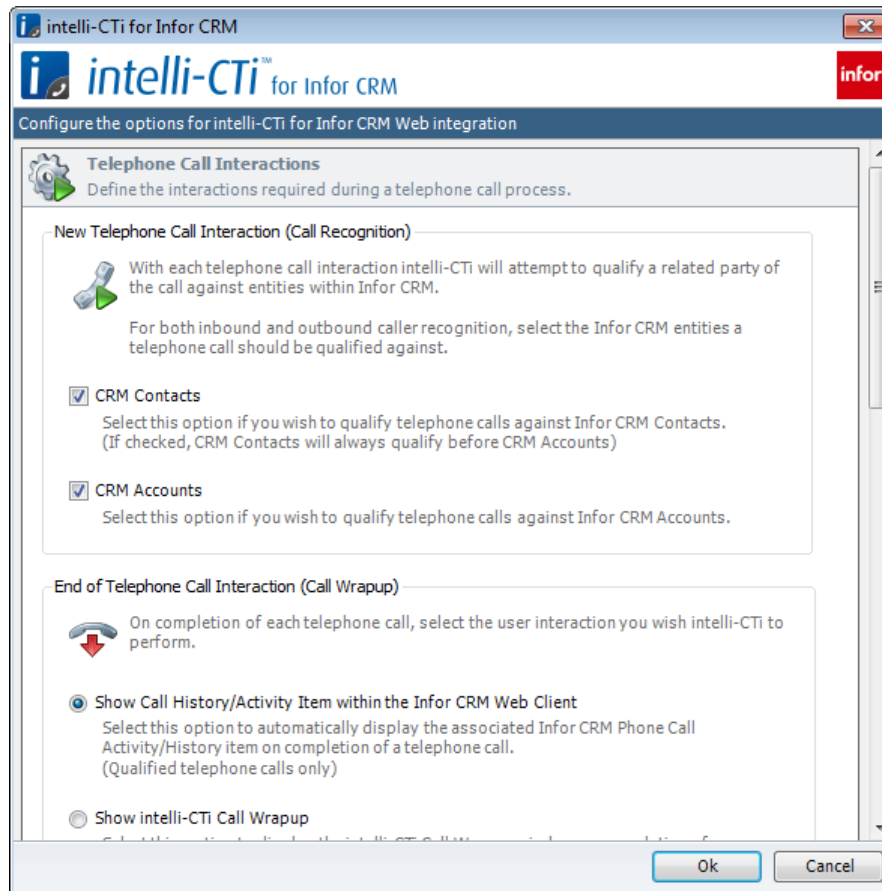
Checking this option will suppress the appearance of CTI related error messages appearing in the Infor CRM CTI Provider.

Enable Application Debugging

Checking this option will cause an extra window to be displayed within the Infor CRM Sales Client. This extra window will display a list of messages and events that occur within intelli-CTi for Infor CRM. This information can be used to assist problem determination.

Configuring integration with the Web Client

Click the Configure Web Client... button.



Call Interactions

1. Select the **Infor CRM Contact** check box to include Contacts when qualifying telephone calls (caller recognition).
2. Select the **Infor CRM Account** check box to include Accounts when qualifying telephone calls (caller recognition).
3. Select the **No Interaction** option if you do not require any interaction (e.g. call wrapup) upon completion of a telephone call.
4. Select the **Show intelli-CTi Call Wrapup** option to display the intelli-CTi Call Wrapup window upon completion of a telephone call.
5. Select the **Show Call Activity Item in Infor CRM Web Client** option to display the Infor CRM history item upon completion of a telephone call.

N.B. This option is only available if the Infor CRM call history creation is enabled.

Call History

1. Select the **Log User Call History** check box to have all external calls logged in the User Call History.
2. Select the **Log Internal Calls** check box to include internal calls in the User Call History.
3. Select the **Log Account/Contact Call History** check box to enable logging of calls that relate to Accounts and Contacts.
N.B. This will only log calls that have been associated to an Account or Contact.
4. Select the **Log Established Calls Only** check box to have only established calls included in the Account/Contact call history.
5. Select the **Create Infor CRM History** check box to have the Account/Contact call history also be automatically logged into the Infor CRM Notes/History tab.

Click the **Close** button.

Click the **Save** button.

You should now be back at the QGate Breeze Configuration window.

Select the **QGate Infor CRM Integration Service** from the list and click the **Manage...** button.

QGate Integration for Infor CRM
Configuration Options

Configuration for the QGate Integration service for Infor CRM

Web Client Integration Options
These options will affect the integration with Infor CRM Web clients

Chosen CRM Web Client Integration
Select the Infor CRM web client integration to be used.
Google Chrome *

Connection Details
The details of the Infor CRM Web connection to be used

To integrate with Infor CRM Web, an SData connection is required.
Enter the Server Connection details, Proxy details (if applicable) and Infor CRM Login Credentials to connect to your SData service.

Infor CRM (SData) Server Connection
The Server name and Port of your SData server

Server: localhost *
Port: 3333 * ☐ Secured Connection (HTTPS)
SData URL: http://localhost:3333/sdata/slx/dynamic/-/
Proxy Settings...

Infor CRM User Credentials
Please enter your Infor CRM Username and Password and click Test...

☐ Windows Authentication ☐ Infor CRM Authentication
Test Connection...
Username: lee *
Password:

For troubleshooting issues: [Click here](#)

1. Enter the Server name and Port number of your Infor CRM (SData) server.
2. If your SData server uses encryption (i.e. you access it using “https”), then select the **Use Encryption** check box.
3. If you use a Proxy within your network, enter the necessary details. Otherwise (or if you are unsure), leave the “Use my network settings” option selected.
4. Enter your User name and Password.
5. Click the **Test Connection...** button to validate the details.
6. Click the **Save** button.

Upgrading intelli-CTi for Infor CRM

This section outlines the steps required and important considerations when upgrading an existing installation of intelli-CTi for Infor CRM.

Installation Outline

This process will potentially involve the upgrade of existing intelli-CTi Bundles within your Infor CRM system, customising Infor CRM, and upgrade of client applications.

Please refer to the sections below that most relate to your Infor CRM implementation.

Important Notes:

- Before starting the upgrade process ensure you have a valid recent backup of the Infor CRM database you are going to upgrade, as recommended on Page 7.

Upgrading intelli-CTi Bundles

LAN Bundles

- Please refer to the process outlined in *Step 1: (LAN + Web) Installing and Configuring Infor CRM LAN Bundles* on Page 11 and install/upgrade newer bundles as required.
- If you have customised your existing installation of intelli-CTi for Infor CRM, pay special attention to ensure you do not overwrite your changes (e.g. by not re-applying the factory default “Customisation” and “Countries Data” bundles).

Web Bundles (if applicable)

- Please refer to the process outlined in the section *Installing the bundle* on Page 20 and install/upgrade newer bundles as required.

Upgrading intelli-CTi Customisations

In addition to the above intelli-CTi Bundles, there may be updates to the “manual” customisations required to your Infor CRM solution to support intelli-CTi.

LAN Client

- Please refer to the LAN customisation steps outlined in *Step 2: (LAN only) Customising Infor CRM LAN for use with intelli-CTi* from Page 14 and update as required.

Web Client

- Please refer to the Web customisation steps outlined in *Step 3: (Web only) Customising Infor CRM Web for use with intelli-CTi* from Page 20 and update as required.

Upgrading Client Installations

Use the supplied “intelli-CTi for Infor CRM” client installer to upgrade existing client installations. For more details of any necessary client configuration steps, please refer to *Step 9: (LAN + Web) Configuring intelli-CTi for Infor CRM on the Client* on Page 35.

intelli-CTi – Technical Support and Troubleshooting

In the interest of providing customers with the latest product support information and troubleshooting assistance, 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.