

intelli-CTi[™] for Infor CRM

Version 4.2

Infor CRM LAN Client User/Administrator Guide

Document Version 1.5



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Overview

This document guides you through the processes you will use on a day to day basis while using intelli-CTi for Infor CRM. This includes:

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

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

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

Who Should Read this Document

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

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

Additional intelli-CTi Reference Information

For information on installing and configuring intelli-CTi, see the intelli-CTi – Installation and Configuration Guide.

For information on using intelli-CTi, see the intelli-CTi – User Guide.

For information on installing and configuring intelli-CTi for Infor CRM (LAN and Web client), see the *intelli-CTi – Infor CRM Getting Started Guide*

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

For information on developing application integration with intelli-CTi, see the *intelli-CTi* – Software Developers Kit (SDK).

(contained within the SDK directory of your intelli-CTi for Infor CRM Installation Package).

For additional reference information on intelli-CTi, see the intelli-CTi Help Center at <u>www.intellicti.com/help</u>.

For up to date information on intelli-CTi, please visit the product website at <u>www.intellicti.com</u>.

About intelli-CTi

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

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

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

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

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

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

Customer Recognition

intelli-CTi can provide the function that advises you who is calling and displays their records automatically. By giving immediate access to your customer records, intelli-CTi saves both caller and user time, enhances customer servicing and increases business productivity.

Customer History

intelli-CTi can record a full history of in and outbound calls, recording the time, date, duration of the call and allowing the user to type full details of the conversation, arrange follow-up activities and associate the call with CRM Opportunities and Tickets.

Responding to Campaigns

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

Integration, Customisation and Control

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

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

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

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

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

Opening intelli-CTi

Starting intelli-CTi/Breeze

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

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

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

What is QGate Breeze?

QGate Breeze is a system which contains many applications running on your Windows desktop and provides a common place for each of them to reside.

QGate Breeze also provides a common desktop presentation in the form of the Breeze desktop sidebar. The sidebar provides users with a dynamic and unobtrusive display of information and control of Breeze applications.



Figure 1 – Breeze sidebar collapsed



Figure 2 – Breeze sidebar expanded

intelli-CTi running within QGate Breeze

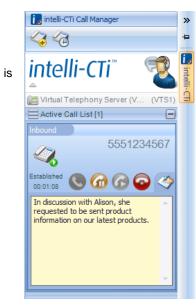


Figure 3 - intelli-CTi in Breeze

intelli-CTi uses the QGate Breeze framework as both the hosting container for the intelli-CTi services and the visual presentation of the Breeze Desktop sidebar.

Leveraging the power of the Breeze Desktop sidebar, intelli-CTi able to dynamically present telephone call information and call control during a telephone call.

Furthermore, the Breeze Desktop sidebar provides the ability to dynamically spring out during telephony activity (e.g. incoming call) and then automatically collapse away when not required.

Incoming Calls

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

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

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

Scenario

You receive an incoming telephone call.

Step by Step

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



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

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

intelli-(Ti [™] for Infor CRM	1		
	all Association to associate this telephone ca	all to a related entity in Info	r CRM?	
Select suggested call	related Account/Contact or se	earch for an alternative.		
Next Action: Sho	w Selected Entity	-	Select	Cancel
Related Account: Contact Name	[Abbott Ltd.]	Department	City	
John Abbott	President	Administration	Chicago	
Lou Balbo	VP of Sales	Sales	Chicago	=
Dean Drew	VP of Cust Service	Customer Service	Chicago	1
Sydney Hamilton	Director of IT	MIS	Chicago	
Sophia Perez	Manager	Purchasing	Chicago	
Marina Rogers	Director of Marketing	Marketing	Chicago	-
All Contacts Fir	nd Con <u>t</u> act Find <u>A</u> ccount	Add <u>N</u> ew		
/nbound	Call: 18005551234		An	swer <u>C</u> all

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

Associate Telephone Call options

Next Action drop down menu options:

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

All Contacts – Show all contacts at the selected account.

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

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

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

Answer Call – Answer the incoming call.

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

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

Cancel - Close the Associate Telephone Call dialog.

Answering the Call

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

					M - [Contact: Joh	nn Abbott]		inteli-CTi Cal Manager
File Ec	lit View Ir	isert Schedule Lookup W	rite Tools Window	Help				ka ka ka
Back Forward History Navigate	Save	Copy List/Detail	ortunity 🚜 Return 📑	Campaign	Neeting	Notepad Complete Note Activity	Add Contr C Export Gr S Import Les Import	intelli-CTi 🔹
Sales	Contacts Q	L 14 4	1 of 8	P P	4			Active Call List [1]
Sales Jachboard Accounts Confacts Leads	Contact: Account: Title: Aast: Dear: Address: Mailing Owner: Mid	John Abbott Abbott Ld President Ms. Jane Smith 205 W. Grand Avenue Subcago, IL, 66651 USA Acct. Mgr.: Hogen, LL	Drect: Mobile: Fax: Home: Other E-mail: Web: te Q Cont. Type:	(312) 555-785 (312) 555-123 (312) 555-123 (312) 555-754 (312) 555-354 (312) 555-354 (312) 555-354 (312) 555-354 (312) 555-354 (312) 555-354 (312) 555-354 (312) 555-785 (312) 555-785 (3		Do Not Solicit	Do Not Mail	John Abot President Aboo ILI Batistere Ottas
					Drag a tab here to			
portunities	More Tabs Tilter C		ture Requests Attachmotes E-mail	ents Lead Sou		Processes Associa Records shown: 14	tions Summary	
Activities	Type	Date/Time	Contact Name	Result	Description		^	
۵.	Phone Call	6/23/2015 5:01: Administrator,	Abbott, John	Complete	Inbound (Establishe			
	Phone Call	6/18/2015 3:11: Hogan, Lee	Abbott, John		Outbound Call (Est			
	Phone Call	6/18/2015 3:09: Hogan, Lee	Abbott, John		Inbound Call (Estab			
		6/12/2015 11:05 Hogan, Lee	Abbott, John	Complete	Inbound (Establishe	ed)	=	
	Phone Call							
	Phone Call	4/20/2007 8:41: Hutchinson, Ba			Info Requested			
Calend~	Phone Call E-Mail	4/20/2007 8:41: Hutchinson, Be 4/12/2007 Hogan, Lee	Abbott, John	Complete	Call Tickets for Abb	oott Ltd.		
Calend=	Phone Call E-Mail Meeting	4/20/2007 8:41: Hutchinson, Ba		Complete Complete		sott Ltd.		
Calend× Varketing	Phone Call E-Mail	4/20/2007 8:41: Hutchinson, Be 4/12/2007 Hogan, Lee	Abbott, John		Call Tickets for Abb	bott Ltd.		
Calend = Marketing Service	Phone Call E-Mail Meeting	4/20/2007 8:41: Hutchinson, Ba 4/12/2007 Hogan, Lee 4/11/2007 7:00: Hogan, Lee	Abbett, John Abbett, John	Complete	Call Tickets for Abb Status Meeting			
Calend*	Phone Call E-Mail Meeting Phone Call	4/20/2007 8:41: Hutchinson, Ba 4/12/2007 Hogan, Lee 4/11/2007 7:00: Hogan, Lee 3/14/2007 6:30: Hogan, Lee	Abbott, John Abbott, John Abbott, John	Complete Complete	Call Tickets for Abb Status Meeting Won the deal			

Call Notepad

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



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

Call Hangup/Wrapup



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



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

Call Info Tab

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

Activity Management Tab

intelli-CTi - Telephone Call Wrapup	
intelli-CTi [™] for Infor CRM	
Telephone Call Wrapup Manage post telephone call actions and activites.	Complete Minimize
Association Account: Abbott Ltd. Contact: John Abbott	Re-Associate
Call Info Activity Management Campaigns/Lead Sources Opp	ortunities Tickets
Call Related Activities Use this area to manage Infor CRM activities relating to the	is telephone call.
Infor CRM Activity Management	
Manage Activities (6) Manage existing Activities for this Contact.	Mana <u>ge</u>
Schedule Follow-up Activity Schedule a foliow-up Activity for this Contact. Phone Call Meeting To-Do	Schedule
Record History Record this call as Activity History for this Contact.	Create History
Include Call Statistics Include Call Statistics within Infor CRM Activity and H	istory Notes

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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.

ntelli-CTi - Manage Ac	tivities			×
intelli-C	Ti [™] for Infor C	RM		- T
Call Related Ac Manage Infor CR	tivities Mactivities relating to t	his Account/Contact.		
John Abbott, Abbott L	.td.			
Call Related Activities	5			Close
Date/Time	User	Description	Category	
2 03/12/2008 21:00	Barb Hutchinson	Generate Proposal	Sales	Update
8 04/12/2008 17:30		Status Meeting		Complete
12/12/2008 14:30		Golf Outing at Harboursid		
18/12/2008	Barb Hutchinson	Follow-up - Customer Sati	Follow-up	
23/12/2008 8 18/11/2010 16:54		Dinner meeting Follow up phone call reg		
			just my related Activities	
To Do: Scheduled for	or: 03/12/2008 21:00:0	0		
Generate a revision for close of business.	Lee. Lee should be in f	he office to work together to get '	this document out by	Ť

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

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

ieneral Recu	ming Attachments							
Start Time: Duration:	03/12/2008 21:00		Timeless	🗹 Alam	: 15		minutes dt day	•
	Contact	C Lead						
Name:	Abbott, John	Q	Opp	ortunity:	Abbott Ltd	Phase3		Q
Account:	Abbott Ltd.	9	Tick	ket:				Q
Regarding:	Generate Proposal							
Location:								
	Concerts a multiple for	Lee. Lee shoul	t be in the office	to work too	ether to get thi	s docume	et eut hu	
Notes	close of business.			to nonctog	ound to get the		ant out by	4
Notes				to mont tog	ono to got an	, and an	and Out by	*
Notes				egory:	Sales		and out by	~
×.			Cat	egory: Barb Hutcl				

- 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

ieneral Memi	pers Resources Recurring Attachme	ents		
Start Time:	22/06/2015 15:08	Timeless Alam:	15 v minutes	Ŧ
Duration:	15 • minutes •	[Auto rollover to next day	
	Contact Contact			
Name:	Abbott, John	Opportunity:		Q
Account:	Abbott Ltd.	Ticket:		Q
Regarding: Location: Notes	Follow up phone call regarding incomit John called to discuss arrangements for installed ASAP. The VP for sales, Lou Balbo, needs to	or a product demonstration. He r	needs to get an application	***
				Ŧ
		Category:		
Priority:			on 22/06/2015	

- 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.

	d Phone Call for John Abbott					×
General Attac	chments					
Completed:	22/06/2015 15:10		Scheduled:	22/06/2015	5 14:16	
Duration:	16 v minutes v	Timeless		Users	Resources	
Result:				_		
	Contact Contact					
Name:	Abbott, John		Opportunity:			
Account:	Abbott Ltd.		Ticket:			
Regarding:	Inbound Call (Established)					
Location:						
Notes	John called to discuss arrangements for a ASAP. The VP for sales, Lou Balbo, needs to be			-	n application installe	d ^
Priority:	None		Category:			
Leader:	Administrator	Scheduled	by Administrate	or on 22/06/2	015 15:10	
Follow-Up	Automatic Follow-Up: <a>None>	<u>T</u> o-Do		Over Notes Over Attachm	ients	
			0	< C	Cancel He	lp 🛛

13. Click OK.

Campaign/Lead Source Tab

	for Infor CRM		
Telephone Call Wr Manage post telepho	apup ne call actions and activites.	Complete	Minimize
	count: Abbott Ltd. ntact: John Abbott		Re-Associate
	ent Campaigns/Lead Sources Opport		
all Info Activity Managem	paigns and Contact Lead Sources	unities Tickets	
	attribute this telephone call to an Infor CR	M Campaign and/or Contact L	ead Source.
for CRM Marketing C	ampaigns		
Related Campaign Res	oonse for this call		
Call Related Campaign: Response Status:	(None) No Campaign response has been adde	ed for this telephone call.	
Add Quick Response	Add a quick Campaign response This action will add a campaign re		
Add Detailed Response.	Add a detailed Campaign respons This action provides user definition		
for CRM Contact Lea	d Sources		
Related Contact Lead S	ource for this call		
Call Related Lead Source: Lead Source Status:	(None) No Contact Lead Source has been add	ded for this telephone call.	
Add Quick Lead Source	Add the suggested Contact Lead	Source for this Contact with	today's date.
Add dalok Load Source.			

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

intelli-CTi - Man	age Campaign	Responses				×
intelli	-CTi [™] fo	r Infor CRM			L.	C BA
	ited Campaign: optionally attribut	s e this telephone call to an In	for CRM Marketi	ng Campaign.		Close
John Abbott						
Campaign Res	sponses For: J	ohn Abbott				
Campaign Name		Stage	Method		Response Dat	
Dell Optiplex Spe	cial	E-Mail Blast 2	E-mail		30/10/2013	
Windows Vista 0	Conversion	Postcard Mailer	E-mail		08/11/2013	
Lenovo X Series	Intro	Follow Up Phone Call	E-mail		02/12/2013	
Campaign Name Dell Optiplex Spe Lenovo X Series PhoenixPC Dell S	Intro	Description Discounted pricing on Introduction of new X Seminar to distribute in	Series	Active		
Response Date:	22/06/2015		Comments:			
Method:	Phone	•				*
Stage:	E-Mail Blast 1	•				
Lead Source:		Q				~
	Automatical	ly add Contact Lead Source			Ad	d Response

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

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

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

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

ntelli-CTi - Ma	nage Contact Lead Sou	irces						х
intell	i-CTi [™] for Inf	for CRM				2.s		
	lated Lead Sources optionally attribute a Co	ntact Lead Source to thi	s telep	hone call.			Close	
John Abbott								
Contact Lead	l Sources For: John A	bbott						
Lead Date	Description			Туре				
24/02/2007	Trade Show - Gene	ral		Trade Show				
	itact Lead Source							
Available Co	ntact Lead Sources							
Active Lead	d Sources Only							
Description			Туре		Status			^
Advertising - G	eneral		Adve	rtising	Active			_
Advertising - W	eb Banner Ads		Adve	rtising	Active			-
Direct Mail - Ge	neral		Direct	Mail	Active			
E-mail - Genera	I		E-mai	l i	Active			
Event - Genera			Event		Active			_
Durchsead Liet	General		Durch	aead l iet	Active			
		Lead Source Date:	22/0	6/2015		Add Le	ad Source	

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

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

Opportunities Tab

intelli-CTi - Telephone	Call Wrapup					×
intelli-C	Ti [™] for I	nfor CRM				
Telephone Ca Manage post tel		tions and activites.			Complete	Minimize
Association	Account: A Contact: J	bbott Ltd. ohn Abbott				Re-Associate
Call Info Activity Mana	Oppportunit	npaigns/Lead Source / Opportunity to relate		Tick	ets Add New.	. Lookup
Infor CRM Opportu	nity Manage	ment				
Opportunity:	Abbott Ltd	Phase2				
Status:	Closed - V	/on	Stage:	6-De	cision	
Close Date:	Estimated:	19/04/2014 14:47:	Actual	26/0	3/2014 14:47:	
Comments:		d trying to standardi n different tools. Pu				

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

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

Tickets Tab

intelli-CTi - Telephone C	all Wrapup			×
intelli-C1	for Infor CRM			
Manage post telep	Nrapup hone call actions and activites.		Complete	Minimize
	Account: Abbott Ltd. Contact: John Abbott			Re-Associate
Call Info Activity Manage	ement Campaigns/Lead Sources Op	portunities Tick	ets	
Call Related Su You can optiona	ipport Ticket Ily select a support Ticket to relate to th	is telephone call.		Lookup
Infor CRM Ticket Mar	nagement			
Ticket Number:	000032			
Subject:				
Status:	Closed			
Description:	Samantha Brink 10/20/2006 7:34:47 F Some of the DVD drives of the new 1 playing a sales presentation, some or Video cannot be shown on the comp reasons: a) Low video memory. Please try usit	Tecra laptops are f the systems are uter monitor beca	e not working prope e getting the followi ause of one of the	ing error: following
Resolution:	Samantha Brink 10/21/2006 10:35 All I found another mention that may exp with DVD video, a BIOS upgrade may problems do not have the most recen Ive attached the most current version fecra. According to the instructions, then boot the laptop from the installat	lain the issue. "F / be necessary." It version of the E n of the BIOS (1.6 you'll need to cro	For many laptops to It may be that the BIOS installed, but t 6 released April 201 eate an installation	laptops having he others do. D2) for the diskette, and

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

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

Telephone Call Wrapup Buttons

Complete

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

Re-Associate ...

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

intelli-C	Ti - Associate Tel	ephone Call		×
int	elli-CT	for Infor CRM		
	Telephone Call A Would you like to a		o a related entity in Infor CRM	?
Select	suggested call relat	ed Account/Contact or sear	ch for an alternative.	
				Select Cancel
Relate	d Account: Abb	ott Ltd.		
Contact	Name	Title	Department	City
John Ab	bott	President	Administration	Chicago
All C	ontacts Find Co	nțact Find <u>A</u> ccount	Add New	
(R)	Inbound Ca	III: 18005551234 (E	Established)	
	DDI: 201	Relating to:		

- 2. From the Associate Telephone Call dialog select the required button:
 - All Contacts Displays a list of all contacts at the selected Account.
 - Find Contact... Enables the user to search Infor CRM for the required contact name.

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

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

<u>Minimize</u>

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

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

More Tabs	User Activities (Calls)	User Call Tasks				
👏 My	Call Tasks			Action Task	Reassign	Refresh
Task Date	∇ Task Type	Description	State	Reassi	gned By	Reassigned Date
22/06/2015	Wrapup	Call Wrapup with: John Abbott (Abbott Ltd.)	- Inbound Call (Established Minimize	d		

CRM Details

Schedule a New Activity

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

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

Call History

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

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

Incoming Telephone Number Not Recognised

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

Scenario

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

Step by Step



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

intelli-C	Ti - Asso	ciate Telephone Cal					×
int	elli	-CTi [™] for In	for CRM				
		ne Call Association u like to associate this	telephone call t	o a related entity	in Infor CRM?		
Select s	suggeste	d call related Account/	Contact or sear	ch for an alterna	tive.		
NextA	ction:	Show Selected Entity	/	•		Select	Cancel
Relate	d Accou	int: No Account/Co	ntact was fou	nd relating to	this telepho	ne number	
Contact	Name	Title		Department		City	
All C	ontacts	Find Contact Fii	nd <u>A</u> ccount	Add <u>N</u> ew			
<u>п</u>		,, <u>, , , , , , , , , , , , , , , , , , </u>	,				
(R)	Inbou	und Call: 0132	9123123			Ar	nswer <u>C</u> all
	DDI: 20	1 Rela	iting to:				

- 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.

	Lastname	Starting With 🔽 🗸	avery	OK
Name	Account	Phone	Authorized	
Avery, David	Arnold Publications	(808) 555-7714	No	Cancel
				Help

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



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

intelli-CTi - Telephone Call Wra	pup	×
intelli-CTi [™] fo	r Infor CRM	
Telephone Call Wrapup Manage post telephone ca		Minimize
Association	t: Arnold Publications t: David Avery	Re-Associate
Call Info Activity Management	Campaigns/Lead Sources Opportunities Tickets	
<u></u>	nation elated information about this telephone call.	
Call Statistics Call Direction (Outcome): Call Start Date/Time (Duration):	Inbound (Established) 22/06/2015 15:27:35 (00:00:02)	
Call Related Information		
Call Description / Regarding:	Inbound Call (Established)	
Call Category:		
Call Result:		***
		~

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

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

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

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

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

Making Outbound Calls – Infor CRM LAN Client

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

• Manually using the telephone handset.

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

• Using the call number buttons in Infor CRM.

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

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

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

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

• 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.

🚨 intelli-C	for Infor CRM	
Abbott Ltd.		
All Contacts]	Cancel
All Account Contacts:		
Contact Name	Title	Primary A
John Abbott	President	Yes
Lou Balbo	VP of Sales	No
Dean Drew	VP of Cust Service	No
Sydney Hamilton	Director of IT	No
TNS Telephone	Numbers:	anage <u>D</u> ial
John Abbott Number Type	Telephone Number	Restricted
Direct Number	(312) 555-7854	No
Home Number	(312) 555-3543	No
Mobile Number	· · · ·	No
	(312) 555-8685	
Contact Fax Number	(312) 555-7545	No

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

intelli-CTi Call Histo	1				
utbound Calls Inbou	nd Calls M	issed Calls			
Call Start	Duration	Call End	Number	Call Info 1	Call In ^
22/06/2015 15:30:38	00:00:02	22/06/2015 15:30:40	01329123123	David Avery	Owner =
22/06/2015 14:18:28	00:16:00	22/06/2015 14:34:28	18005551234	John Abbott	President
17/06/2015 15:25:31	00:22:12	17/06/2015 15:47:43	5551234567		
17/06/2015 15:21:13	00:00:06	17/06/2015 15:21:19	5551234567		
17/06/2015 15:20:49	00:00:03	17/06/2015 15:20:52	5551234567		
17/06/2015 15:19:51	00:00:03	17/06/2015 15:19:54	5551234567		
17/06/2015 15:18:02	00:00:01	17/06/2015 15:18:03	5551234567		
17/06/2015 15:17:23	00:00:28	17/06/2015 15:17:51	5551234567		
17/06/2015 15:16:48	00:00:01	17/06/2015 15:16:49	5551234567		-
•		III			۱.
Refresh					Close

• Use the Redial button from the Telephony Call Manager.

User Call History								
🄊 My Call H	listory (Administrator)						Call Wrapup Redial	
Call Start Time	∇ Call Description	Duration	CLI (CallerID)	Direction	Result	Account Name	Contact Name	
22/06/2015 15:26	Inbound Call (Missed)	00:00:00	01329123123	Inbound	Missed			
22/06/2015 14:16	Inbound Call (Established)	00:16:00	18005551234	Inbound	Established	Abbott Ltd.	John Abbott	
22/06/2015 14:15	Inbound Call (Missed)	00:00:00	18005551234	Inbound	Missed	[Abbott Ltd.]		
22/06/2015 14:14	Inbound Call (Missed)	00:00:00	18005551234	Inbound	Missed	[Abbott Ltd.]		
22/06/2015 14:13	Inbound Call (Missed)	00:00:00	18005551234	Inbound	Missed	[Abbott Ltd.]		
22/06/2015 14:12	Inbound Call (Missed)	00:00:00	18005551234	Inbound	Missed	[Abbott Ltd.]		

Dialing Out Using the Call Number Buttons

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

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



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



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

No Answer

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

intelli-CTi - Telephone Call Wrap	pup	×
intelli-CTi [™] fo	r Infor CRM	
Manage post telephone ca		Minimize
	a Clearview Corporation Inc. Joe Adams	Re-Associate
Call Info Activity Management	Campaigns/Lead Sources Opportunities Tickets	
Call Statistics / Inform Statistical call data and r	nation elated information about this telephone call.	
Call Statistics Call Direction (Outcome): Call Start Date/Time (Duration):	Outbound (No Answer) 22/06/2015 15:41:20 (00:00:00)	
Call Related Information		
Call Description / Regarding:	Outbound Call (No Answer)	
Call Category:		
Call Result:	intelli-CTi - No Answer	
		*

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

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

Line Busy



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

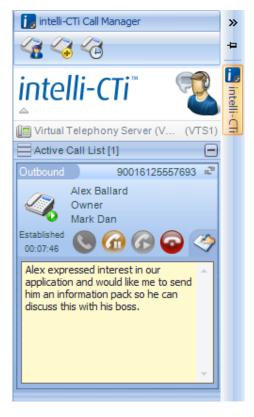
intelli-CTi - Telephone Call Wra	pup	×
intelli-CTi [™] fo	r Infor CRM	
Manage post telephone call Wrapup		
	t: Clearview Corporation Inc. t: Joe Adams	
Call Info Activity Management	Campaigns/Lead Sources Opportunities Tickets	
Call Statistics / Inform	nation elated information about this telephone call.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

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

Call Answered

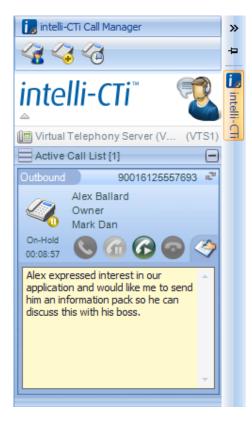
- 1. If the call is answered the intelli-CTi display will change the status and the **Hold** button will be made available.
- 2. If required, click on the **Call Notes** button on the toolbar.





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

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



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

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

Call Wrapup

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

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

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

Call Wrapup - Call Info Tab

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

Call Wrapup - Activity Management Tab



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

Manage Activities (3)

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

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

nteili-C	Ti [™] for Infor C	RM		7
Call Related A Manage Infor CF	ctivities RM activities relating to t			
ohn Abbott, Abbott I	Ltd.			
Call Related Activitie	8			Close
Date/Time	User	Description	Category	
03/12/2008 21:00	Barb Hutchinson	Generate Proposal	Sales	Update
5 04/12/2008 17:30	Lee Hogan	Status Meeting		Comple
12/12/2008 14:30	Lee Hogan	Golf Outing at Harboursid		
8 18/12/2008	Barb Hutchinson	Follow-up - Customer Sati	Follow-up	
23/12/2008 18/11/2010 16:54	Lee Hogan	Dinner meeting Follow up phone call reg		
		Show	just my related Activities	
			ĺ	
To Do: Scheduled f	or: 03/12/2008 21:00:0	0		
enerate a revision for		0 the office to work together to get	this document out by	
			this document out by	
enerate a revision for			this document out by	
enerate a revision for			this document out by	
enerate a revision for			this document out by	
enerate a revision for			this document out by	
enerate a revision for			this document out by	
enerate a revision for			this document out by	

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.

	ming Attachments			
Start Time:	03/12/2008 21:00	Timeless 🛛 Alam:	15 • minutes	•
Ouration:	4 v hours v]	Auto rollover to next day	
	Contact Contact			
lame:	Abbott, John Q	Opportunity:	Abbott LtdPhase3	Q
Account:	Abbott Ltd.	Ticket:		Q
Regarding:	Generate Proposal			
Notes	Generate a revision for Lee. Lee sho close of business.	uld be in the office to work toge	ther to get this document out by	*
				-
	-	Category:	Sales	
nonty:		Scheduled by Barb Hutch	inson on 28/11/2008 00:09 origin	

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

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

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

Schedule Phone	Call	3
General Membe	rs Resources Recurring Attachments	
Start Time: Duration:	22/05/2015 15:03 Treeless Ato relover to next day	
	@ Contact O Lead	
Name:	Abbott, John 🔍 Opportunity:	
Account:	Abbott Ltd. Q Ticket: Q	
Regarding:	Follow up phone call regarding incoming call recieved on 22/06/2015 14:16:20	
Location:		
Notes	John called to discuss amangements for a product demonstration. He needs to get an application installed ASAP. The VP for sales, Lou Babo, needs to be copied in on all communications.	
	*	
Priority:	Category:	
Leader:	Administrator Q Scheduled by Administrator on 22/06/2015	
Time Zone	OK Cancel Help	

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

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

Completed:	22/06/2015 15:10	Scheduled:	22/06/2015 14:16	
Ouration:	16 v minutes v	Timeless	Users Resources	
Result:				
	Contact Contact			
Name:	Abbott, John	Opportunity:		
Account:	Abbott Ltd.	Ticket:		
Regarding:	Inbound Call (Established)			
ocation:				
	John called to discuss arrangements for a ASAP.	product demonstration. He r	needs to get an application installe	ed 🔺
				ed 🔺
	ASAP.			ed A
Location: Notes V	ASAP.			ed A
Notes	ASAP. The VP for sales, Lou Balbo, needs to be	copied in on all communicat	ions.	Ŧ
Notes Viority: .eader:	ASAP. The VP for sales, Lou Babo, needs to be None Administrator	copied in on all communicat Category: Scheduled by Administrat	or on 22/06/2015 15:10	Ŧ
Notes V	ASAP. The VP for sales, Lou Balbo, needs to be None	Copied in on all communicat Category: Scheduled by Administrat	ions.	Ŧ

13. Click OK in Infor CRM.

Call Wrapup - Campaign/Lead Source Tab

elli-CTi - Telephone Call \		
ntelli-CTi	for Infor CRM	
Telephone Call Wra Manage post telephon	pup ne call actions and activites.	inimize
	ount: Abbott Ltd. Re-As	ssociate.
all Info Activity Manageme	ant Campaigns/Lead Sources Opportunities Tickets	
	pa <mark>igns and Contact Lead Sources</mark> attribute this telephone call to an Infor CRM Campaign and/or Contact Lead Sour	
You can optionally a	ttribute this telephone call to an infor CRM Campaign and/or Contact Lead Sour	rce.
nfor CRM Marketing Ca	Impaigns	
Related Campaign Resp	onse for this call	
Call Related Campaign:	(None)	
Response Status:	No Campaign response has been added for this telephone call.	
Add Quick Response	Add a quick Campaign response for the suggested Campaign. This action will add a campaign response using default values.	
Add Detailed Response	Add a detailed Campaign response for this Contact.	
Add Detailed Response	This action provides user definition of the Campaign response.	
nfor CRM Contact Lead	Sources	
Related Contact Lead So	f = 4 = = 10	_
Related Contact Lead So Call Related Lead Source:		
Lead Source Status:	(None) No Contact Lead Source has been added for this telephone call.	
	Add the suggested Contact Lead Source for this Contact with today's d	late.
Add Quick Lead Source	Add the suggested contact Lead Source for this contact with today's d	
Add Quick Lead Source Add Detailed Lead Source		

- 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.

You can o John Abbott Campaign Res		s e this telephone call to an In	nfor CRM Marketing C	ampaign.	Close
Campaign Res	ponses For: J				
	ponses For: Je				
Ocean allow Marrie		ohn Abbott			
Campaign Name		Stage	Method	Response I	Date
Dell Optiplex Spec	ial	E-Mail Blast 2	E-mail	30/10/2013	
Windows Vista C	onversion	Postcard Mailer	E-mail	08/11/2013	
Lenovo X Series I	ntro	Follow Up Phone Call	E-mail	02/12/2013	
Campaign Name Dell Optiplex Spec	ial	Description Discounted pricing on		atus tive	-
	cial	Discounted pricing or	Dell Optiplex Mo Ac	tive	
Lenovo X Series	intro	Introduction of new X Series		tive	
PhoenixPC Dell Se	eminar Invitation	Seminar to distribute i	information on ne Ac	tive	
Response Date:	22/06/2015		Comments:		
	Phone	•			*
Method:					
Method: Stage:	E-Mail Blast 1				
Response Date:		 	Comments:		

- 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.

ntelli-CTi - Mai	nage Contact Lead Source	;						X
intell	i-CTi [™] for Infor	CRM				1.		
	ated Lead Sources optionally attribute a Contac	t Lead Source to thi	s teleph	one call.			Close	
John Abbott								
Contact Lead	I Sources For: John Abbo	tt						
Lead Date	Description		T	ype				_
24/02/2007	Trade Show - General		Т	rade Show)
	tact Lead Source							
Active Lead	I Sources Only							
Description			Туре		Status			-
Advertising - G	eneral		Advert	ising	Active			-
Advertising - W	eb Banner Ads		Advert	tising	Active			-
Direct Mail - Ge	neral		Direct I	Mail	Active			
E-mail - Genera	l i i i i i i i i i i i i i i i i i i i		E-mail		Active			
Event - General			Event		Active			
Durchsead Liet	General		Durcha	iead l iet	Active	-	-	
		Lead Source Date:	22/06	/2015		Add L	ead Source	,

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

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

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

Call Wrapup - Opportunities Tab

intelli-CTi - Telephone	e Call Wrapup			—					
Manage post te	III Wrapup lephone call actions and activites.		Complete	Minimize					
Association Account: Abbott Ltd. Re-Associate									
		_							
Call Info Activity Man	agement Campaigns/Lead Source	es Opportunities	Tickets						
	Oppportunity maily select an Opportunity to relat	e to this telephone	Add New.	Lookup					
Infor CRM Opportu	nity Management								
Opportunity:	Abbott LtdPhase2								
Status:	Closed - Won	Stage:	6-Decision						
Close Date:	Estimated: 19/04/2014 14:47:	Actual:	26/03/2014 14:47:						
Commenta:	Suggested trying to standardi insisting on different tools. PL								

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

	hone Call Wra	pup				e
intelli	-CTi [™] fo	or Infor CRI	N			
	e Call Wrapup ost telephone ca	all actions and ac	tivites.		Complete	Minimize
🔗 Associat		t: Abbott Ltd. t: John Abbott	:			Re-Associate
Call Info Activity	Management	Campaigns/Lead	d Sources Opportuniti	es Ticke	ts	
	ated Support 1 optionally selec					Lookup
						,
Infor CRM Tick	et Managem	ent				
Ticket N	umber: 00003	2				
Subject						
Status:	Closed	J				
Descrip	Some	of the DVD drive g a sales preser	2006 7:34:47 PM (US M es of the new Tecra lap station, some of the sys	otops are r stems are	not working prop getting the follow	ving error:
	reaso	ns:	n on the computer more			-
Resolut	reaso a) Lov	ns: w video memory.	Please try using lower	r display re	solution and/or	2

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

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

Telephone Call Wrapup - Buttons

Complete

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

Re-Associate ...

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

intelli-CTi - Associate	Telephone Call			×					
Telephone Call Association Would you like to associate this telephone call to a related entity in Infor CRM?									
Select suggested cal	related Account/Contact or	r search for an alternative.							
	Select								
Related Account:	Abbott Ltd.								
Contact Name	Title	Department	City						
John Abbott	President	Administration	Chicago						
All Contacts Fir	id Contact Find <u>A</u> ccour	it Add <u>N</u> ew							
Inbound Call: 18005551234 (Established) Dit: 201 Relating to:									
DDI: 201	Relating to:								

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

Minimize

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



Telephony Call Manager, My Call Tasks tab.

Telephone Call Wrapup - Manage Open Activity

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

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

The Call Wrapup / Manage Open Activity dialog

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

Update Activity

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

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

Complete Activity

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

Note: Performing this action will also close this dialog.

Create History

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

Note: Performing this action will also close this dialog.

CRM Details

Schedule a New Activity

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

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

Call History

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

More Tabs	Notes/History	Literature Reques	Attachments	Lead Sources	Opportunities	Processes	Associations	Summary	
💎 Filter O	ptions >>	🥖 Edit / View Not	es E-ma	ail 🛛 🛃 Wo	rd 🔹 🚷 Re	fresh F	Records shown:	1	
Туре	Date/Time	⊽ User Nan	e Conta	ct Name Re	sult (Description			*
Phone Call	22/06/2015 1	5:43:54 Administ	ator Adam	s, Joe int	elli-CTi - No Al (Outbound Cal	l (No Answer)		
									-
L									

Dialing Out from the Opportunities View

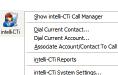
Dialing a telephone call from the Opportunities view can be performed using the intelli-CTi Dialer. The Dialer will automatically display the telephone details of the opportunity account. From this dialog, a search can also be made to locate any account or contact on the Infor CRM database.

Scenario

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

Step by Step

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



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

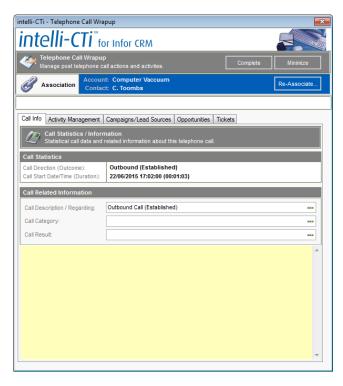
🚨 intelli-	CTi [™] for Infor CRM	
Computer Vaccuum		
All <u>C</u> ontac	ts	Cancel
Account Contact:		
Contact Name	Title	Primary
Contact Name		
C. Toombs	VP Sales	Yes
C. Toombs		
C. Toombs		1
C. Toombs TNS Telephon C. Toombs		1
C. Toombs	e Numbers:	lanage
C. Toombs TNS Telephon C. Toombs Number Type	e Numbers: 📃	lanage Dial Restricted
C. Toombs TNS Telephon C. Toombs Number Type Direct Number	e Numbers: Telephone Number (360) 555-2505	Ianage Dial Restricted No

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



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

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



Dialing Out from the Tickets View

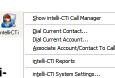
Dialing a telephone call from the Tickets view can be performed using the intelli-CTi Dialer. The Dialer will automatically display the phone details of the Ticket Contact. A search can also be made from the Dialer dialog, to locate any account or contact on the Infor CRM database.

Scenario

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

Step by Step

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



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

Now Matic		for Infor CRM		
Account	All <u>C</u> ontacts			Cancel
Account Contac	:t:			
Contact Name		Title		Primary
Sontaot Hamo				
Linda Alvarez		CFO		Yes
inda Alvarez	elephone Nu		<u>M</u> anage	Yes
inda Alvarez	īelephone Nu Alvarez		Manage	
inda Alvarez				

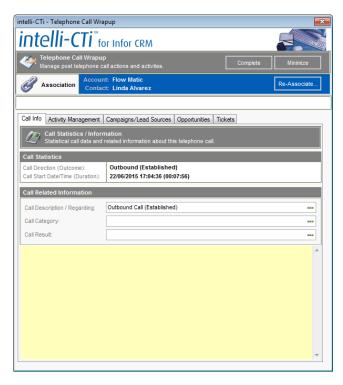
2. From the Dialer dialog, select the phone number then click on the **Dial** button



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

int Teleph	elli-CTi [™] for Ir	nfor CRM				Us	U: er/Team Profile: Defa	ser: Administrator ult System Profile
Team Manager	Call Statistics							
My Active	e Call List				Ans	swer Hold Call	Reconnect	Hangup
Call StartTime	/ Caller ID (CLI)	DDI	c	all Status	Contact Nar	ne A	ccount Name	
System Status: Active	Agent Status: Available				Associa	ite Assign Process	Goto Contact	Goto Account
User Call History								×
🔊 My Call H	istory (Administrator)						Call Wrapup	Redial
Call Start Time	√ Call Description	Duration	CLI (CallerID)	Direction	Result	Account Name	Contact Name	*
22/06/2015 17:04	Outbound Call (Established	00:07:56	90018883461222	Outbound	Established	Flow Matic	Linda Alvarez	
22/06/2015 17:02	Outbound Call (Established)	00:01:03	90013605552505	Outbound	Established	Computer Vaccuum	C. Toombs	E
22/06/2015 16:26	Outbound Call (Established)	00:00:07	90016125557693	Outbound	Established	Mark Dan	Alex Ballard	
22/06/2015 15:51	Outbound Call (Established)	00:14:09	90016125557693	Outbound	Established	Mark Dan	Alex Ballard	
22/06/2015 15:49	Outbound Call (Established)	00:00:27	90019545551010	Outbound	Established	Clearview Corporation Inc	Joe Adams	
22/06/2015 15:46	Outbound Call (No Answer	00:00:00	90019545551010	Outbound	No Answer	Clearview Corporation Inc	Joe Adams	
22/06/2015 15:41	Outbound Call (No Answer	00:00:00	90019545551010	Outbound	No Answer	Clearview Corporation Inc	Joe Adams	
22/06/2015 15:27	Inbound Call (Established)	00:00:02	01329123123	Inbound	Established	Arnold Publications	David Avery	*
	1 Week	-				Goto Contact	Goto Account	Refresh
More Tabs User	Activities (Calls) User Call Task	s						
🚛 My Sche	duled Telephone Calls:	(Todays Calls)				Dial	Goto Contact	Goto Account
Due Date	/ Account Name	Contact Name	Description			Opportunity	Notes	
22/06/2015 15:08:43	Abbott Ltd.	Abbott, John	Follow up p	ohone call regardin	g incoming call re	cieved	John called	o discuss arrang
22/06/2015 16:25:15	Mark Dan	Ballard, Alex	Follow up p	ohone call regardin	g call made on 22	/06/20 [.]	Alex expres	sed interest in ou
All Calls	Today's Calls					Schedule Call	Edit Activity	Complete

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

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

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

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

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

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

Call History (Account)

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

More Tabs Co	tracts Call His		Notestinistory	Accordes Exeratore	Tiequests Mite	chments Opportunities Res	eller opportunities Missociati	ons Summary			
Call Start Time	Call Duration	Direction	Call Result	Related Contact	Related User	Related Activity	Follow-Up Action	Related Opportunity	Related Campaign	Call CLI	Call DDI
03/10/2007 10:42	00:00:04	Inbound	Established	John Abbott	Administrator			Abbott LtdPhase I		(312) 5557678	
01/10/2007 11:43	00:00:00	Outbound	No Answer	<multiple contacts=""></multiple>	Administrator					90013125557545	
27/09/2007 16:31	00:00:11	Outbound	Established		Administrator					90013125557678	
27/09/2007 16:28	00:00:00	Outbound	No Answer		Administrator					90013125557678	
27/09/2007 15:40	00:14:14	Outbound	Established		Administrator					90013125557678	
27/09/2007 15:26	00:11:09	Outbound	Established		Administrator					90013125557678	
27/09/2007 15:16	00:00:00	Outbound	No Answer		Administrator					90013125557678	
27/09/2007 14:57	00:00:00	Outbound	No Answer		Administrator					90013125557678	
27/09/2007 14:57	00:00:00	Outbound	No Answer	John Abbott	Administrator					90013125557678	
25/09/2007 13:57	00:00:03	Inbound	Established	John Abbott	Administrator					3125557678	
25/09/2007 13:52	00:00:05	Inbound	Established	John Abbott	Administrator	Follow up meeting regarding in	Follow up meeting regarding			3125557678	
25/09/2007 13:51	00:00:00	Outbound	No Answer	John Abbott	Administrator					90013125557678	
25/09/2007 09:20	00:27:21	Inbound	Established	John Abbott	Administrator	Follow up phone call regarding	Follow up phone call regardin	Abbott LtdPhase2	QGate Launch Car	3125557678	
25/09/2007 09:20	00:00:01	Inbound	Established	Lou Balbo	Administrator					3125557678	
24/09/2007 13:37	00:05:19	Inbound	Established	Lou Balbo	Schwartz, Parr	Follow up meeting regarding in	Follow up meeting regarding			(312) 5557876	
24/09/1003			Established Sktahlished	Lou Balbo	Administrator					31215557854	

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

Information displayed on this tab:

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

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

Call History (Contact)

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

More Tabs No	otes/History Cal	History (Contact)	Literature Reques	ts Attachments	Lead Sources Opportuni	ies Processes Assoc	iations Summary				
Call Start Time	Call Duration	Direction	Call Result	User	Related Activity	Follow-Up Action	Related Opportunity	Related Campaign	Related Lead Source	Call CLI	Call DDI
03/10/2007 10:42	2 00:00:04	Inbound	Established	Administrator			Abbott LtdPhase I			(312) 5557678	
27/09/2007 14:57	00:00:00	Outbound	No Answer	Administrator						90013125557678	
25/09/2007 13:57	00:00:03	Inbound	Established	Administrator						3125557678	
25/09/2007 13:52	2 00:00:05	Inbound	Established	Administrator	Follow up meeting regarding	Follow up meeting rega				3125557678	
25/09/2007 13:51	00:00:00	Outbound	No Answer	Administrator						90013125557678	
25/09/2007 09:20	00:27:21	Inbound	Established	Administrator	Follow up phone call regard	Follow up phone call re	Abbott LtdPhase2	QGate Launch Can	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.



-					~						x
File Ec	dit View Insert S	chedule Lookup Write	Tools Window	- [intelli-CTi Help	Call Manag	ler: Admi	nistratorj				-
_					(E) at the			E HIGH ANT AN		- 6	<u>, </u>
 Back Forward History Navigate 	Save Copy	List/Detail View	ty 🚜 Return [Campaign	Reeting Contract of the contra	II 🔂 Note Comp Note New Activity	olete E-Mail	Add Contact To Outloo	Speed Search Search	Dialler intelli-CTi	
Sales		elli-CTi [™] for In Dany Call Manager	for CRM					Us	er/Team Profile:	User: Administr Default System Pr	
Sales Dashboard	Team Manager	Call Statistics									
	My Active	Call List					Ans	wer Hold Call	Reconnect	Hangup	
Accounts	Call StartTime	/ Caller ID (CLI)	DDI		Call Statu	5	Contact Nar	ne Ad	count Name		
Sontacts	System Status: Active	Agent Status: Available					Associa	te Assign Process	Goto Contac	ct Goto Accou	unt
3	User Call History										×
Leads	🧟 My Call Hi	story (Administrator)							Call Wrapup	Redial	
		Call Description	Duration	CLI (Calleri		ection	Result	Account Name	Contact N		_
	22/06/2015 17:04 22/06/2015 17:02	Outbound Call (Established) Outbound Call (Established)	00:07:56	900188834		tbound tbound	Established	Flow Matic Computer Vaccuum	Linda Alva C. Toombs		_
-	22/06/2015 16:26	Outbound Call (Established)	00:00:07	900161255		tbound	Established	Mark Dan	Alex Balla		E
2	22/06/2015 15:51	Outbound Call (Established)	00:14:09	900161255		tbound	Established	Mark Dan	Alex Balla		
Activities	22/06/2015 15:49	Outbound Call (Established)	00:00:27	900195455	51010 Ou	tbound	Established	Clearview Corporation Inc	Joe Adam	15	
	22/06/2015 15:46	Outbound Call (No Answer)	00:00:00	900195455	51010 Ou	tbound	No Answer	Clearview Corporation Inc	Joe Adam	IS	
- 🌌 -	22/06/2015 15:41	Outbound Call (No Answer)	00:00:00	900195455	51010 Ou	tbound	No Answer	Clearview Corporation Inc	Joe Adam	15	
intelli-CT i	22/06/2015 15:27	Inbound Call (Established)	00:00:02	013291231	23 Int	ound	Established	Arnold Publications	David Ave	ery	-
	Period Shown:	1 Week	·					Goto Contact	Goto Accour	nt Refresh	
Calendar	More Tabs User A	ctivities (Calls) User Call Task	5								
	My Sched	uled Telephone Calls: (Todays Calls)					Dial	Goto Contac	t Goto Accou	unt
Library	Due Date /	Account Name	Contact Name	Des	cription			Opportunity	Notes		_
E	22/06/2015 15:08:43	Abbott Ltd.	Abbott, John	Folk	w up phone ca	Il regarding i	ncoming call rea	cieved	John ca	alled to discuss ar	rrang
	22/06/2015 16:25:15	Mark Dan	Ballard, Alex	Folk	w up phone ca	Il regarding o	all made on 22	06/20	Alex ex	pressed interest i	in ou
Reports											
Marketing											
Service											
Support	All Calls	Today's Calls						Schedule Call	Edit Activity.	. Complete	
Dashboards								Contrast Cult			
					Mond	y, June 29,	2015 3:23 PM	Administrator	SALESLOG	IX_EVA 💋 🗱	

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					Answe	er Hold Call		Reconnect Hang		Hangup
Call StartTime	Δ	Caller ID (CLI)	DDI	Call S	tatus	Conta	act Name		Account Nam	e
22/06/2015 17:19:46		90013125557854		Estab	lished	John.	Abbott		Abbott Ltd.	
System Status:	Ans	ent Status:								
Active		ailable			Associate	. /	Assign Process	G	oto Contact	Goto Account

My Active Call List Buttons:

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

My Call History

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

🧟 My Call	History (Administrator)						Call Wra	pup	Redial
Call Start Time 🗸	Call Description	Duration	CLI (CallerID)	Direction	Result	Account Name	e	Contact Nar	ne
22/06/2015 17:04	Outbound Call (Established)	00:07:56	90018883461222	Outbound	Established	Flow Matic		Linda Alvare	
22/06/2015 17:02	Outbound Call (Established)	00:01:03	90013605552505	Outbound	Established	Computer Vac	cuum	C. Toombs	
22/06/2015 16:26	Outbound Call (Established)	00:00:07	90016125557693	Outbound	Established	Mark Dan		Alex Ballard	
22/06/2015 15:51	Outbound Call (Established)	00:14:09	90016125557693	Outbound	Established	Mark Dan		Alex Ballard	1
22/06/2015 15:49	Outbound Call (Established)	00:00:27	90019545551010	Outbound	Established	Clearview Cor	poration Ir	Joe Adams	
22/06/2015 15:46	Outbound Call (No Answer)	00:00:00	90019545551010	Outbound	No Answer	Clearview Cor	poration Ir	Joe Adams	
22/06/2015 15:41	Outbound Call (No Answer)	00:00:00	90019545551010	Outbound	No Answe	Clearview Cor	poration Ir	Joe Adams	
Period Shown:	1 Week	•			Г	Goto Contact	Goto Ac	count	Refresh

My Call History Buttons:

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

intelli-CTi - Telephone Call Wra	рир
intelli-CTi [™] fo	or Infor CRM
Telephone Call Wrapup Manage post telephone ca	
	t: Abbott Ltd. t: John Abbott Re-Associate
Call Info Activity Management	
Planagomore	Campaigns/Lead Sources Opportunities Tickets
Call Statistics / Inform Statistical call data and	nation related information about this telephone call.
Call Statistics	
Call Direction (Outcome): Call Start Date/Time (Duration):	Inbound (Established) 22/06/2015 14:16:20 (00:16:00)
Call Related Information	
Call Description / Regarding:	Inbound Call (Established)
Call Category:	
Call Result:	
John called to discuss arrangem	ents for a product demonstration. He needs to get an application installed ASAP.
The VP for sales, Lou Balbo, ner	eds to be copied in on all communications.

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



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

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

User Activities (Calls) Tab

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

More Tabs Use	er Activities (Calls) Use	er Call Tasks				
🚛 My Sch	neduled Telephon	e Calls: (Todays Ca	lls)	Dial	Goto Contact Goto Accou	unt
Due Date 🛛 🛆	Account Name	Contact Name	Description	Opportunity	Notes	
22/06/2015 15:08:	Abbott Ltd.	Abbott, John	Follow up phone call regarding in	coming ci	John called to disc	uss a
22/06/2015 16:25:	Mark Dan	Ballard, Alex	Follow up phone call regarding c	all made o	Alex expressed in	teres
All Calls	Today's Calls			Schedule Call	Edit Activity Complete.	

User Activities (Calls) Tab Buttons:

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

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

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

User Call Tasks

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

🚜 🔤 My	Call Tasks		Acti	on Task Reassign	Refresh
Task Date	∇ Task Type	Description	State	Reassigned By	Reassigned Date
22/06/2015	Wrapup	Call Wrapup with: John Abbott (Abbott Ltd.) - Inbound	d Call (Established Minimized		
22/00/2015	vvrapup	Call Wrapup With. John Abbott (Abbott Ltd.) - Inbound	a call (Established Millimized		

User Call Tasks Buttons:

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

Team Manager Button

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

🕵 Telephony T	eam Call Activi	ity		Refresh	Show Hist	ory Close	,
ilters: Department: (All Departments)			Telephony Users: All Users Active Users Available Coupled on Users Only				
elephony User	User Status	Call Related Information		Call Start Time	Call Duration	Call Direction	
Administrator	Available						
	Not logged in						
	Not logged in						
	Not logged in						
	Not logged in						
	Not logged in						
	Not logged in						
	Not logged in						
	Not logged in						E
	Not logged in						
	Not logged in						
	Not logged in						
	Not logged in						
	Not logged in						
Ed Martinez	Not logged in						
	Not logged in						
	Not logged in						
Rajeev Mitra	Not logged in						
Derek Murray	Not logged in						
	Not logged in						
	Not logged in						
	Not logged in						

You can filter the list by:

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

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

Call Statistics Button

Select this button to display the Call Statistics dialog.

Call Statis						
	im Call Statistics tistics provide a summ	ary of telephony activity.		[Calculate Close	•
Date Range: User Selection:	Start Date/Time:	22/06/2015 00:00	End Date/Time:	22/06/2015 23:59 📰		
	Specific User	Administrator	Q			
all Statistics Report						
ġ		elli-CTi For Infor C 8 23:69	RM - Call Statistic Telephony User: All			_
j	6 00:00 to 22/08/2018		Telephony User: All			_
Report Range: 22/06/201 Call Re Call Types	6 00:00 to 22/08/2018	5 23:59	Telephony User: All	I Users		_
Report Range: 22/06/201 Call Rz Call Types Inbound Calls	6 00:00 to 22/08/2018	7	Telephony User: All Ca Call Times Average Call Len	I Users	00:03:15	_
Report Range: 22/06/201 Call Re Call Types Inbound Calls Outbound Calls	6 00:00 to 22/08/2018	5 23:59	Telephony User: All Ca Call Times Average Call Len Average Wrapup	I Users	00:07:11	_
Report Range: 22/06/201 Call Rypes Inbound Calls Outbound Calls Call Results	5 00:00 to 22/08/2018	5 23:59 7 8	Telephony User: All Call Call Times Average Call Len Average Wrapup Total Call Time	I Users III Timings gth Time	00:07:11	_
Report Range: 22/06/201 Call Re Call Types Inbound Calls Outbound Calls Call Results Established Calls (Inbo	5 00:00 to 22/06/2016	5 23:69 7 8 8	Telephony User: All Cal Call Times Average Call Len Average Wrapup Total Call Time Most Active Call	I Users III Timings gth Time	00:07:11	-
Report Range: 22/06/201 Call Re Call Types Inbound Calls Outbound Calls Call Results Established Calls (Inbo Unanavered Calls (Out)	6 00:00 to 22/06/2016 atios und/Outbound) bound)	5 23:59 7 8	Telephony User: All Call Times Average Call Len Average Virspup Total Call Time Mott Active Call Shortest Call	I Users III Timings gth Time	00:07:11 00:48:52 Administrator	-
Report Range: 22/06/201 Call Re Call Types Inbound Calls Outbound Calls Call Results Established Calls (Inbo Unanswered Calls (Cut Missed Calls (Inbound)	6 00:00 to 22/06/2016 atios und/Outbound) bound)	5 23:59 7 8 8 2 8 8	Telephony User: All Call Times Average Call Len Average Virapup Total Call Time Most Active Call ' Shortest Call User	I Users III Timings gth Time	00:07:11 00:48:52 Administrator	-
Report Range: 22/06/201 Call Re Inbound Calls Outbound Calls Call Results Establiste Call Results Establiste Missed Calls (Inbound) Missed Calls (Inbound) Missed Calls (Inbound)	8 00:00 to 22:08/2018 ntios und/Outbound) bound)	7 8 8 2 6 0	Telephony User: All Call Times Average Call Len Average Wrspup Total Call Time Most Active Call T Shortest Call User Call Duration	I Users III Timings gth Time	00:07:11 00:48:52 Administrator	-
Report Range: 22/06/201 Call Re Call Types Inbound Calls Outbound Calls Call Results Established Calls (Inbo Unanswered Calls (Chil Missed Calls (Inbound)	8 00:00 to 22:08/2018 ntios und/Outbound) bound)	5 23:59 7 8 8 2 8 8	Telephony User: All Call Times Average Call Len Average Virapup Total Call Time Most Active Call ' Shortest Call User	I Users III Timings gth Time	00:07:11 00:48:52 Administrator	-

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

	m Call Statistics stics provide a summ	ary of telephony activity.			Calculate	Close
Date Range:	Start Date/Time:	01/10/2007 00:00	End Date/Time:	01/10/2007 23:59		
User Selection:	 All Users 					
	O Specific User	Administrator	9			
		-				

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

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

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

intelli-CTi Toolbar and Menu – Infor CRM LAN Client

Show Dialer Toolbar Button



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

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

😹 intelli-(CTi [™] for Infor CRM	
Abbott Ltd.		
All Contact	s	Cancel
Account Contact:	Title	Primary
		r r mary
John Abbott	President	Yes
John Abbott		Yes Manage
John Abbott		1
John Abbott		1
John Abbott TNS Telephone John Abbott	e Numbers:	Manage
TNS Telephone John Abbott John Abbott Number Type	e Numbers:	Manage Dial
John Abbott TNS Telephone John Abbott Number Type Direct Number	e Numbers:	Manage Dial

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

Button Functions

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

intelli-TNS - Manage Telephone Numbers Window

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

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

Archive Numbers – Remove from view and archive selected numbers.

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

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

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

Current Telephone Numbers

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

Edit Direct Number (Con	tact)	×						
intelli-TNS 🛛 🖉								
Direct Number	(Contact)	OK Cancel						
John Abbott, Abbott Lte	d.							
Telephone Number D	efinition	🕼 Auto Tab						
Country	United States of America	•						
Telephone Number	Country Area Code Main Number Exten	sion						
	Note: Area Code should include all digits (including any	y leading zeros)						
Display Number	(312) 555-7854 📝 Display Ext	ension						
Dialling Options Include All Elements Include all elements when dialling this telephone number (excluding extension number) Restricted Telephone Number This is a restricted telephone number (unsolicited calling/marketing is not permitted)								
Number Recognition	for Recognition none number for caller recognition.	Inbound Call Hits O						

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

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

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

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

Captured Numbers

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

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

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

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

intelli	-TNS: Manage Contact	Telephone Numbers							×
in	telli-TNS								5
	Telephone Numbers							ОК	Cancel
John	Abbott, Abbott Ltd.								
	Current Telephone I	Numbers (Available	Types)			Captured Numbers	;		
	Number Type	Number	Extension	Restricted		Number Type	/ Number	Extension	Restricted
Î	Direct Number	(312) 555-7854		Yes	-	Captured Number	(013) 291-2312	22	No
ł	Home Number	(312) 555-3543		No					
	Mobile Number	(312) 555-8685		No	-				
	Contact Fax Number	(312) 555-7545		No					
	Pager Number			No		4		Edit	Delete
	Other Number #1			No		Archived Numbers			
						Number Type	Number	Extension	Restricted
					-				
	Dial		Edit	Delete]	1		(Delete

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

- 2. To Edit the captured number details, click on the Edit button in the Captured Numbers section.
- 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.

Archived Numbers			
lumber Type	Number	Extension	Restricted
Work Number (Archived)	(714) 555-2431		No

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.

A
-

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.



<u>S</u>	how intelli-CTi Call Manager
D	ial Current Contact jal Current Account ssociate Account/Contact To Call
in	telli-CTi Reports
in	telli-CTi System Settings

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

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

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

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

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

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

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

intelli-CTi System Settings

System Administration

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

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

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

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

intelli-CTi Users Tab

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

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

	VI - System Administration				
璚 intell	i-CTi [™] for Infor	CRM			
System Managemen	t				
intelli-CTi Users Site/	Jser Profiles DDI Profiles S	vstem Settings Telephone	Numbers Licence		Close
		,		_	0.000
intelli-CTi U Infor CRM us	sers ers with access to intelli-CTi.				
intelli-CTi User	/ Title	Department	User Type	~	
Barb Hutchinson	Inside Sales Representat	Inside Sales	Concurrent		
Brian McNulty	Director Global Marketing	Marketing	Concurrent	-	
Cathy Hughes	Northwest Sales	Field Sales	Concurrent		
Dan Barret	Northeast Sales	Field Sales	Concurrent		
Derek Murray	UK Sales	Field Sales	Concurrent	=	
Ed Martinez	Southwest & Latin Ameri	Field Sales	Concurrent		
Georgine Ekels	Australia Sales	Sales	Concurrent		
Hans Stichler	Germany Sales	Field Sales	Concurrent		
Jay Johnson	Defects Manager	Development	Concurrent		
Jean Grant	Manager of Sales, EMEA	Sales	Concurrent		
Joan Curbough	Customer Service Repre	Tech Support	Concurrent		
John Smith	Administrative Assistant	Sales	Concurrent		
Ken Dryden	Manager of Sales, Asia/F	Sales	Concurrent		
Kim Lee	Singapore Sales	Field Sales	Concurrent		
Larry Peters	Marketing	Marketing	Concurrent		
Lee Hogan	Midwest Sales Executive	Field Sales	Named		
l inda Walsh	Southeast Sales	Field Sales	Concurrent	*	
			Manage User	s	

Managing Users

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

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

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

intelli-CTi for Infor CRM - Manage int		×
intelli-CTi for Int	for CRM	
intelli-CTi - User Access Select the Infor CRM users with	n access to intelli-CTI.	OK Cancel
Available Infor CRII Users (All Departments)	Named intellicTI Users 11 of 20 >> Dan Barret Derek Murray E Gil Marinaz Man Schlein Jay Johnon Jana Curbough Jan Curbough Les Hogan Cut Samantha Bryk	
	Concurrent Hiells CTI Users John Stath Kin Lee Linda Walah Linda W	
You are licensed for 20 n	amed users and 5 concurrent users	

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

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

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

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

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

<	>
<<	>>

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

Site/User Profiles Tab

intelli-CTi Site Profiles

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

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

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

intelli-CTi User Profiles

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

ystem Manag ntelli-CTi Users		System Settings Telephone N	umbers Licence	
Itelli-C IT Users	DDI Profiles 3	system settings Telephone IV	umbers Licence	Close
	-CTi Site Profiles ofiles define the telephony settings		r CRM site.	
Site Name		Site Country		
Default Site		United Kingdom		
intelli	-CTi User/Team Profiles	A <u>d</u> d	Edit Delete	
🔛 User/1	-CTi User/Team Profiles eam Profiles define the telephony se Profile Name			
User/1 Type	eam Profiles define the telephony se	ettings and behaviour for an Ini	for CRM User or Team.	
User/T Type System	eam Profiles define the telephony se	attings and behaviour for an Int	for CRM User or Team.	
User/T Type System Team	eam Profiles define the telephony se Profile Name Default System Profile	attings and behaviour for an Int Site Name Default Site	for CRM User or Team.	
Type System Team User Sugar Team	eam Profiles define the telephony se Profile Name Default System Profile Global	sttings and behaviour for an Int Site Name Default Site Default Site	for CRM User or Team. Role User User	

Scenario

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

Step by Step

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

Insert New intelli-CTi - Site Profiles	—
intelli-CTi [™] for Infor CRM	
Site Management	
General Dialling Support Call Logging/Tracking	ок
Site Profile Information Site Profiles define information and telephony behaviour specific to a given location. Specify a descriptive name and country for your intelli-CTVInfor CRM site location.	Cancel
Site Name: EMEA	
Site Country Location: United Kingdom ****	

2. From the General tab type a Site Name.

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

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

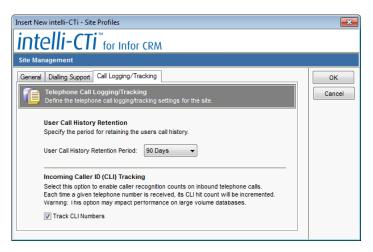
The Site Country Location is the name of the country this Site relates to. This information is used to control worldwide considerations and terminology.

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

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

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

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



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

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

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

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

11. Click OK.

Scenario

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

Step by Step

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

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

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

User/Team Profiles – General Tab

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

- 5. From the User/Team Profile dialog click on the General tab.
- 6. Select the Auto Start intelli-CTi checkbox to have intelli-CTi automatically start when Infor CRM is opened.
- 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

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

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

User/Team Profiles – Call Notifications Tab

Edit intelli-CTi - User/Team Profile Information	×
intelli-CTi [™] for Infor CRM	
💽 [Team] - Global	<u>U</u> ser/Team
General Location Call Notifications Call Wrapup Call History Security	ОК
Call Notifications Define actions/behaviour when an incoming telephone call is received.	Cancel
▼ Enable Screen-Popping	
Select this option to enable Screen-Popping (the presenting of a call notification window during an incoming call).	
Screen-Pop Internal Calls Select this option to enable Screen-Popping of internal calls.	
Show Selected Entity Next action after closing screen-pop window	
When a Contact/Account has been selected, this action will be performed.	
Run Processes on Incoming Calls	
Select this option to automatically run contact processes once an incoming call has been associated to an Infor CRM Contact.	
Run DDI Processes Only	
Select this option to run contact processes only for incoming calls to numbers that are in the intelli-CTi DDI profiles list	
Call Notification/Association Window	
Specify the Infor CRM window you wish to use to notify of an incoming call and associate the call to an Infor CRM Account/Contact.	
Call Notification Window: intelli-CTi:Call Associate (Standard)	

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

Nothing - Do Nothing.

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

Show Call Manager – Opens the Telephony Call Manager.

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

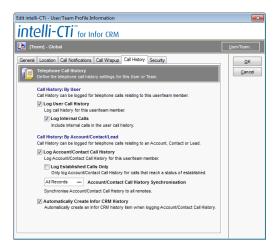
Edit intelli-CTi - User/Team Profi			×
intelli-CTi [™] fo	Infor CRM		
🔯 [Team] - Global			User/Team
General Location Call Notificati	ons Call Wrapup Call History	Security	<u>о</u> к
Call Wrapup Define actions/behaviour	when a telephone call is complet	ed.	Gancel
Enable Call Wrapup Select this option to e	nable call Wrapup (display an act	ion form on completion of a call).	
Wrapup Establishe Only show the call W			
Auto Close Wrapup Automatically close th			
Enable Call Reassig Enable the user to re-	nment Jefine the call association during t	he call Wrapup.	
Include Call Statisti Automatically include	cs call statistics within the notes or	an Activity/History item.	
Control Agent State Automatically change	is the Agent status to 'In Wrapup' d	uring call Wrapup.	
Call Wrapup Window Specify the Infor CRM	window you wish to use to perfo	rm the call wrapup process.	
Call Wrapup Window:	intelli-CTr Call WrapUp (Standar	d) 🔻	
Include Detail Tabs:	Activity Management	Opportunities	
	Campaigns/Lead Sources	Support Tickets	
L			-

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

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

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

User/Team Profiles - Call History Tab



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

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

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

User/Team Profiles – Security Tab

Edit intelli-CTi - User/Team Profile Information	×
intelli-CTi [®] for Infor CRM	
🔯 [Team] - Global	User/Team
General Location Call Notifications Call Wrapup Call History Security	<u>о</u> к
hintelli-CTi User/Team Security Define this User/Team's security level.	Gancel
User/Team Profile Security Level Define the security level and access control required for this User or Team. User/Team Role: User Role Description: User cannot change any intell-CTI settings.	

- 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.

intelli-CTi for I	Infor CRM - System Admi	nistration			×
🖾 in	telli-CTi [®] fo	or Infor CRM			
System Mana	agement				
intelli-CTi User	s Ste/User Profiles DDI	Profiles System S	ettings Telephone I	Numbers Licence	Close
	Ili-CTi DDI Profiles Profiles define telephony be	haviour relating to	a specific DDI teleph	one number.	
DDI Number	Regarding (LCD Text)	Hits Active	Campaign Name	Lead Source Name	
			Add	Edit Delete	
					-

3. Click on the Add... button.



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

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

Click on the Reset button to zero the count.

9. Click on the Campaign/Lead Source tab.

General	Campaigns/Lead Sources	Processes
7	Related Campaign	
4	Specify (optionally) a rela	ted Campaign to associate to this DDI telephone number.
	Campaign Name:	Forbes.com Banner Campaign
	Default Lead Source:	Advertising - Web Banner Ads 🔹
	-	e Campaign Response a Campaign response for Contacts calling this DDI telephone number.
- > -	C Related Contact L	ead Source
*	-	ead Source ted Contact Lead Source you would like to associate to this DDI telephone number.
*	-	
*	Specify (optionally) a rela Contact Lead Source:	ted Contact Lead Source you would like to associate to this DDI telephone number.

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

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

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

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

18. Click **OK**.

System Settings Tab



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

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

Telephone Numbers Tab

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

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

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

intelli-CTi for Infor CRM - System Administration	×
intelli-CTi [™] for Infor CRM	
System Management	
Intelli-CTI Users Site/User Profiles DDI Profiles System Settings Telephone Numbers Licence	Close
intelli-CTi Telephone Number Support Settings relating to intell-CTi Telephone Number Support (Intelli-TNS).	
Intell-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 affective biolound caler recognition.	
intelli-CTI number management facility is known as intelli-TNS (Telephone Number Support)	
intelli-TNS System Settings	
Before using intelli-CTI we highly recommend configuring your intelli-TNS settings.	
Configuration of Intel®-TNS includes: - Defining Intel®-TNS system settings - Defining Intel®-TNS county definitions - Migration of existing Infor CRM telephone numbers	
To confgure your intell-TNS system settings, click the button below.	

To access the Telephone Numbers tab:

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

Manage intelli-TNS System Settings	
intelli-TNS	1
Telephone Number Support	Close Cancel
About Intell-TNS TNS System Settings TNS Number Settings TNS Country Settings Number Migration	
About IntellI-TNS Outline of the features of inteli-TNS.	
Intell-THS is an addition to Infor CRM providing extended telephone number management in support of telephony in intell-CTI for Infor CRM.	tegration with
intelli-TNS seamlessly manages the capturing of telephone numbers for Accounts and Contacts whilst ensuring ea is correctly formatted for the country of origin.	ach telephone number
Intell-TNS telephone numbers are used for both outbound and hobund telephone calls, ensuring: - Inbound telephone calls are accurately matched with Infor CBM Accounts and Contacts. - Outbound telephone calls dial the correct telephone number sequence, including international dialing rules.	
Important Considerations	
Before using intell-TNS, we strongly advise you to review the following intell-TNS settings: - intell-TNS Defaut Country (TNS System Settings tab): This defines the defaut country appropriate to your inst used to determine telephone number formats where country information is missing from an Account/Contact a	
 - inteli-TNS Country Definitions (TNS Country Settings tab): This defines the desired telephone number formattin telephone numbers around the World. 	g for

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

4. Click on the TNS System Settings tab.

TNS System Settings Tab

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

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

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

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

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

3. Click on the TNS Number Settings tab.

	System Settings		
ntelli-	ΓNS		ļ.
elephone Numb	er Support		Close Cano
bout intelli-TNS 1	NS System Settings TN	IS Number Settings	TNS Country Settings Number Migration
	per Settings number settings and beha	aviour of intelli-TNS	S number management.
Telephone Nu	mber Management		TNS Telephone Number Fields
When an Acc	lephone Number Chan ount telephone number is scade this change to Acc ne number.	changed, select th	
Cascade Acti	on: Prompt User for C	ascade Action	This Field Button-Click Action
Use the table	mber Descriptions s below to define the des telephone number type (Select the action required when a user performs a button-click action on the button next to a TNS telephone number field.
Account Te	lephone Numbers		
	Icphone Numbers Number Description Main Number Alternative Number Toll Free Number #1	Form Label Main: Alternative: Toll Free:	THS Field Highlighting ThS number fields highlight (with colour) certain telephone numbers based upon their content. Examples
Number Typ Main Alternate	Number Description Main Number Alternative Number	Main: Alternative:	TNS number fields highlight (with colour) certain telephone numbers based upon their content.
Number Typ Main Alternate Toll Free 1	Number Description Main Number Alternative Number	Main: Alternative:	TNS number feids highlight (wht colour) certain telephone numbers based upon their content. Examples Restricted Numbers 5555 332211 (S) Change
Number Type Main Alternate Toll Free 1 Contact Te	Number Description Main Number Alternative Number Toll Free Number #1	Main: Alternative:	TNS number fields highlight (with colour) certain telephone numbers based upon their content. Examples
Number Type Main Alternate Toll Free 1 Contact Te Number Type Direct	Number Description Main Number Akemative Number Toll Free Number #1 lephone Numbers Number Description Direct Number	Main: Alternative: Toll Free:	ThiS number fields highlight (with colour) certain telephone numbers based upon their content. Examples Restricted Numbers 555) 332211 (Change) hyvid Numbers 1222001 (S) (Change)
Number Type Main Alternate Toll Free 1 Contact Te Number Type	Number Description Main Number Alternative Number Toll Free Number #1	Main: Alternative: Toll Free: Form Label	ThiS number fields highlight (with colour) certain telephone numbers based upon their content. Examples Restricted Numbers 555) 332211 (Change) hyvid Numbers 1222001 (S) (Change)

TNS Number Settings Tab

Telephone Number Management

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

Telephone Number Descriptions

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

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

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

TNS Telephone Number Fields

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

Main:	(312) 555-7678	۵
Alternate:	(800) 555-1235	۵
Fax:	(312) 555-7545	

TNS Field Double-click Action:

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

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

dit Direct Number (Co	ntact)	
intelli-TN	√S	5
칠 Direct Number	(Contact)	OK Cancel
lohn Abbott, Abbott Li	td.	
Telephone Number E	Definition	📝 Auto Tab
Country	United States of America	•
Telephone Number	Country Area Code Main Number	Extension
	Note: Area Code should include all digits	(including any leading zeros)
Display Number	(312) 555-7854	Display Extension
	ments nts when dialing this telephone number (exc sphone Number de telephone number (unsolicited calina/mark	
This is a containt		
This is a restrict	ed telephone number (unsolicited calling/mark	toting to not permittedy
This is a restrict	, , , ,	Inbound Call Hits

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

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

TNS Field Button-Click Action:

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



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

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

TNS Field Highlighting:

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

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

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

TNS Country Settings Tab

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

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

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

Intelli-TNS INS International Country Settings						
INS International Country Settings						
Country Name	*	Country Settings				
Suden						
Suriname		Country Definition Settings				
Svalbard and Jan Mayen Islands						
Swaziand		Official Country Name	United State	s of America		
Sweden		Related Infor CRM Country	USA			
Switzerland						
Syrian Arab Republic		Country ISO Code	USA			
Tajikistan						
Thailand		Telephone Number Manage	ement			
The former Yugoslav Republic of Macedonia		Country Dialling Code				
Timor-Leste		Enter the telephone dialing of	ode for this co	luntry:	1.	
logo		Area Code Length				
Tokelau		Enter the exact or longest A	rea Code numb	er length for this country:	3	
Tonga						
Trinidad and Tobago		Main Number Length	the main talents	one number for this country:	10	
Tunisia		Crist ore interest weight or	ing ingen bereger	one names is the country.		
Turkey		Telephone Number Form	atting (Option	naD		
Turkmenistan				or this country. Use % characters	to to indicate numb	ers.
Turks and Calcos Islands		Brackets Area Code	Separator	Main Number		
Tuvalu		(• XXX	Space -	300K-X000K		
Iganda						
Ukraine		Display Country Code		Example: (012) 012		
United Arab Emirates	14	Should the country code	be displayed t	for this country's telephone number	ors.	
United Kingdom of Great Britain and Northern Ireland	1.1			ontact Example: (012) 012		
United Republic of Tanzania	11	Should the country code	be recorded in	the infor CRM Account/Contact 5	elephone number fi	eids.
United States Virgin Islands	14	Include Country Code				
United States of America		Should the country code	be used when	n performing caller recognition of t	telephone numbers	
Uruquay						

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

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

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

Use the 'X' characters to denote number placement.

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

Number Migration Tab

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

intelli-CTi – Technical Support

In the interest of providing customers with the latest product support information, QGate provides the following online resources within our intell-CTi Help Center website:

General Support

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

www.intellicti.com/help/

Troubleshooting

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

Troubleshooting for intelli-CTi for Infor CRM

System Requirements

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

www.intellicti.com/help/sysreqs/

Product Information

For more information about intelli-CTi, please visit the intelli-CTi product website:

www.intellicti.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.