intelli-CTi™
for Infor CRM

Version 4.2

Infor CRM Web Client User/Administrator Guide

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intelli-CTI – Infor CRM Web User/Administrator Guide

Overview

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

Who Should Read this Document

The first part of this document is intended for users of intelli-CTi for the Infor CRM Web Client (See page 8).

The second part of this document is intended for Infor CRM administrators who are responsible for configuring intelli-CTi for the Infor CRM Web Client (See page 22).

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, see the *intelli-CTi – Infor CRM Getting Started Guide*

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

For information on 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 www.intellicti.com/help.

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

About intelli-CTi

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

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

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

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

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

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

Customer Recognition

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

Customer History

intelli-CTi can record a full history of in and outbound calls, recording the time, date, duration of the call and allowing the user to type full details of the conversation.

Opening intelli-CTi

Starting intelli-CTi/Breeze

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

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

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.
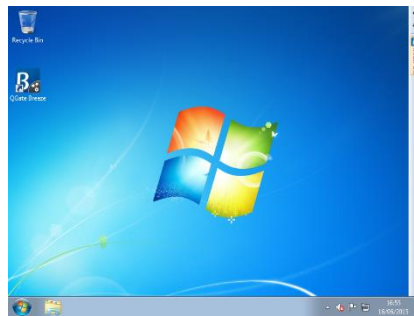
Figure 1 – Breeze sidebar collapsed
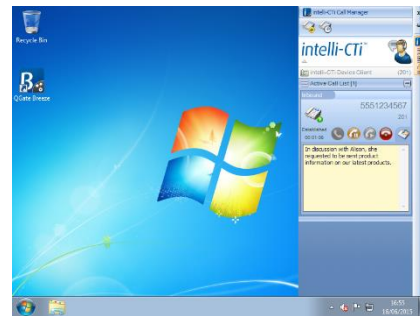
Figure 2 – Breeze sidebar expanded

intelli-CTi running within QGate Breeze

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

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

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

Figure 3 - intelli-CTi in Breeze

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 (e.g. a call coming in from an Account switch board number), the list will show each matching Contact.

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.
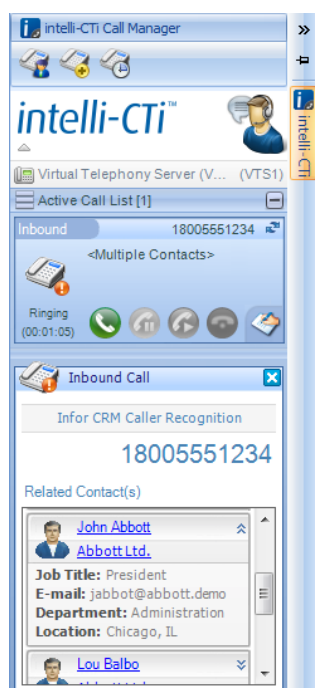
2. If the originating phone number exists in Infor CRM, the **Infor CRM Caller Recognition** panel is displayed.

    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 12.

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).

Answering the Call

1. The call can be answered by picking up the telephone handset or clicking on the intelli-CTi **Answer** button.

2. Once you have confirmed who the caller is, select their name from the Infor CRM Caller Recognition panel.

3. On selection of the caller's name from the Infor CRM Caller Recognition panel, the Infor CRM contact record will be displayed.

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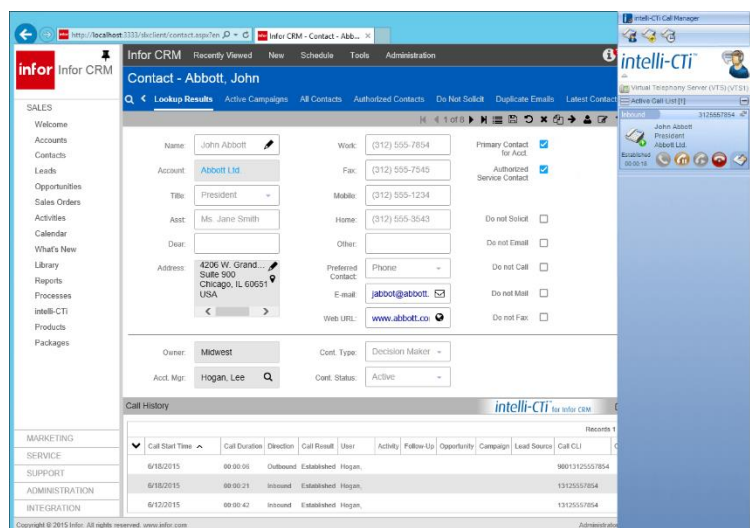
Call Notepad

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.
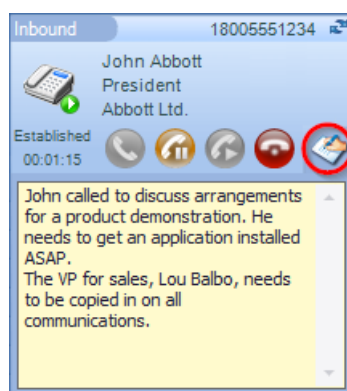
2. Type the detail of the conversation and additional notes while on the phone.

3. The Call Notes will be automatically moved to the call wrapup screen when the call finishes.

Call Hangup/Wrapup

1. To end the call, replace the telephone receiver or select the intelli-CTi **Hangup** button.

2. The **Telephone Call Wrapup** dialog will automatically be displayed.

3. In the **Telephone Call Wrapup** dialog, you can finish off typing your notes about the call.

4. When you press the **Complete** button, the dialog will be closed and the call details and notes will be saved in Infor CRM.

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 or Account.

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 you of the call. In the **Infor CRM Caller Recognition** panel, no caller details are listed.

2. Click on the **Answer** button or pick up the telephone receiver to answer the call.

3. Once you have established that it is David Avery calling, navigate to his Contact record in Infor CRM. The Infor CRM Caller Recognition panel will update to indicate that you could associate the call with the Contact that is currently displayed in Infor CRM.
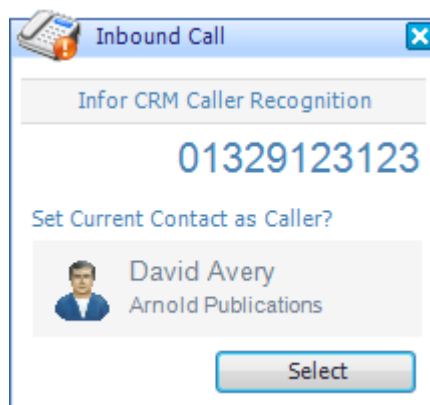
4. Click the Select button to associate the call with the Contact that is currently displayed in Infor CRM.

5. The intelli-CTi display updates to show the details of the associated caller.

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6. When you have finished the call, click the intelli-CTi **Hangup** button or replace the telephone receiver to close the call.
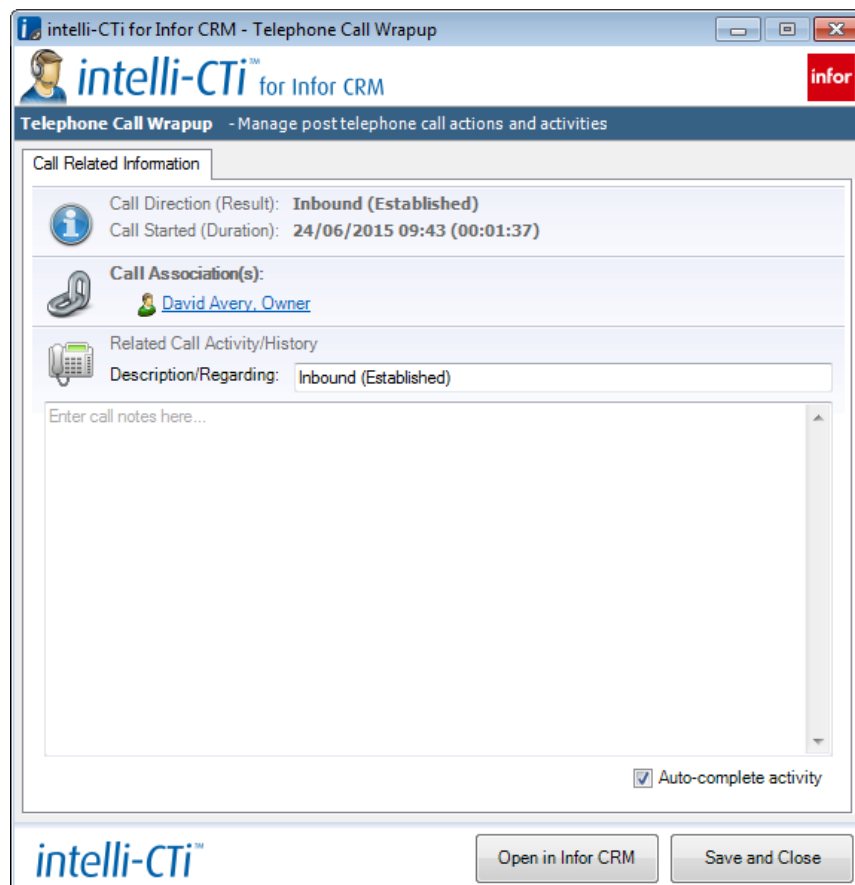
7. The Telephone Call Wrapup dialog is automatically displayed. Complete the details on the **Telephone Call Wrapup** dialog then click on the **Complete** button.
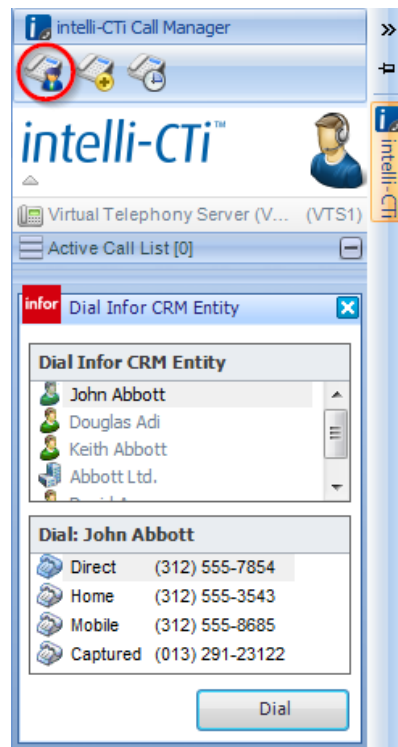

Making Outbound Calls

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 Infor CRM Caller Recognition panel will be displayed for confirmation of the contact being called.

- Dial an Infor CRM Account, Contact or Lead using the intelli-CTi Entity Dialer:

- Dial directly using the intelli-CTi Number Dialer.
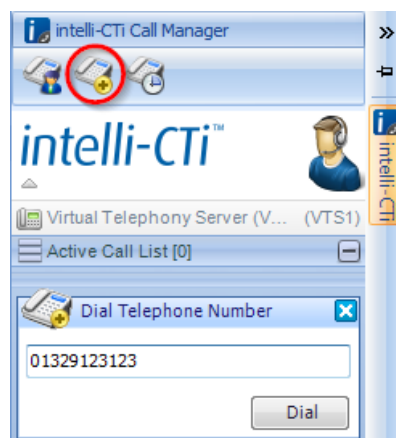
On dialing a number that exists in Infor CRM, the Infor CRM Caller Recognition panel will be displayed for confirmation of the contact being called.

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

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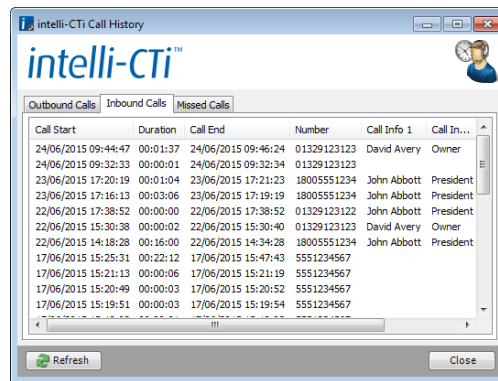
Dialing Out Using the intelli-CTi Entity Dialer

1. In Infor CRM, navigate to the Account, Contact or Lead that you wish to dial.

2. Click on the intelli-CTi Dial Entity button.
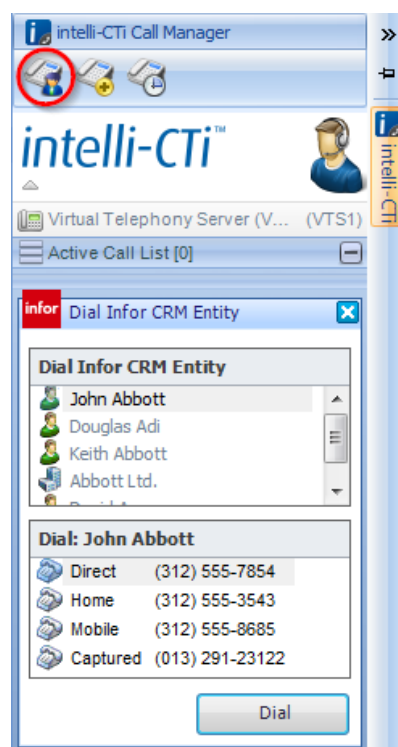
3. Select the entity you wish to dial. The top-list contains a list of the last few entities that you have visited in Infor CRM. The most recent entity is at the top and is selected by default.

4. In the list of telephone numbers, select the telephone number that you wish to dial.

5. Click the dial button.

6. The call will be dialed and you will be notified of its progress by the intelli-CTi panel:

7. You can use the in-call notepad in exactly the same way as for an inbound call. See page 10.

8. When the call is complete, the Call Wrapup window will be displayed where you can continue typing notes for the call.

9. When you have finished writing notes, click the **Complete** button. The call details and your notes will be stored in Infor CRM.

Call History

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

Where to find Call History

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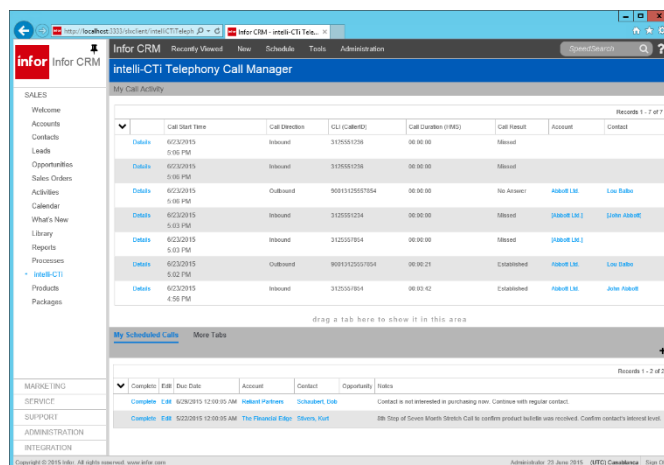
The intelli-CTi Telephone Call Manager assists the users in managing their calls within Infor CRM. The call information shown in the Telephony Call Manager is based around the **user's** activities:

My Call Activity – a list of all the phone calls the current user has completed.

My Scheduled Calls– a list of all the current user's open Phone Call activities.

See the Telephony Call Manager section on page 20 for further information.

Call History (Account)

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

If the tab is not visible on your system, try looking in the More Tabs tab.

To access the Call History tab, locate the required account record then click on the Call History tab.
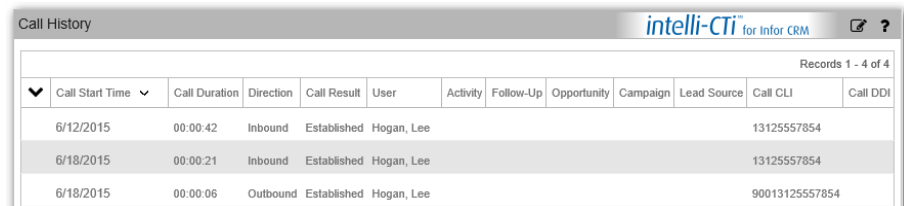
Information displayed on this tab:

- **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.
- **Contact** – The name of the contact associated with making or receiving the phone call.
- **User** – The name of the Infor CRM user making or receiving the phone call.
- **Activity** – The details of the Infor CRM activity that was associated to this call by the named user.

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- **Follow-Up** – Details of any follow-up activities.

- **Opportunity** – Details of any opportunity this phone call was related to.

- **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 tab on the Contact Detail view displays call information relating to the selected Contact.

If the tab is not visible on your system, try looking in the More Tabs tab.

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

- **User** – The name of the Infor CRM user making or receiving the phone call.

- **Activity** – The details of the Infor CRM activity that was associated to this call by the named user.

- **Follow-Up**– Details of any follow-up activities.

- **Opportunity** – Details of any opportunity this phone call was related to.

- **Campaign** – Details of any Campaign this phone call was related to.

- **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

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

1. To access the Telephony Call Manager, click on the **intelli-CTi** Navbar button.

My Call Activity

This tab displays all the calls you have made or received.

You can navigate to the related Account or Contact by clicking on their name in the Account or Contact column.

My Scheduled Calls

The **My Scheduled Calls** tab lists phone call activities that you have scheduled in Infor CRM.

You can navigate to the related Account or Contact by clicking on their name in the Account or Contact column.

You can Complete or Edit the phone call activity by clicking on the *Complete* or *Edit* link on the relevant row.

intelli-CTi Client Settings

The instructions for configuring the intelli-CTi for Infor CRM Web Client are given in the *intelli-CTi – Infor CRM Getting Started Guide*.

Here is a brief summary of the configuration options that are available:

Call logging options

You can configure how calls are logged into Infor CRM:
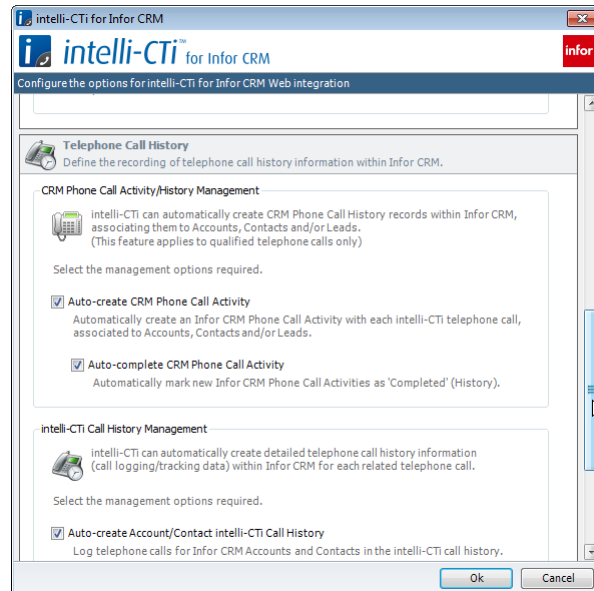
Connection options

You can configure the details of the Infor CRM SData connection:

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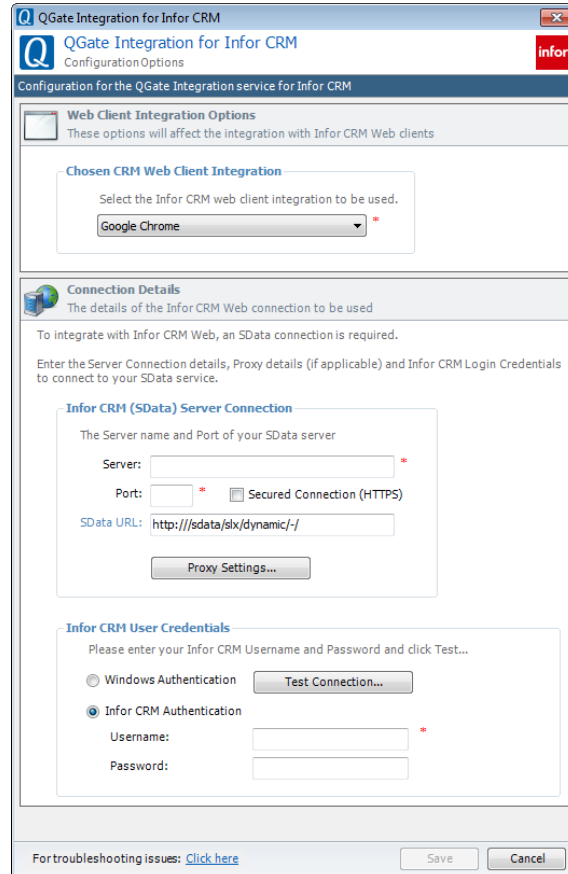
intelli-CTi Server Settings

System Administration

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

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

The administration of intelli-CTi for Infor CRM Web Client is performed from within the Infor CRM LAN Client.

To access the intelli-CTi System Settings:

1. Open up the Infor CRM LAN Client and log in as 'administrator'.

2. Click the right mouse button on the intelli-CTi Navbar button and select **intelli-CTi System Settings…**

Important Note: Many of the intelli-CTi for Infor CRM settings only apply to the LAN client integration. The settings that apply to the Web client integration are described below. Any other settings do not apply to the Web client integration.

Telephone Numbers Tab

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

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

The Telephone Number tab gives access to your intelli-TNS settings.
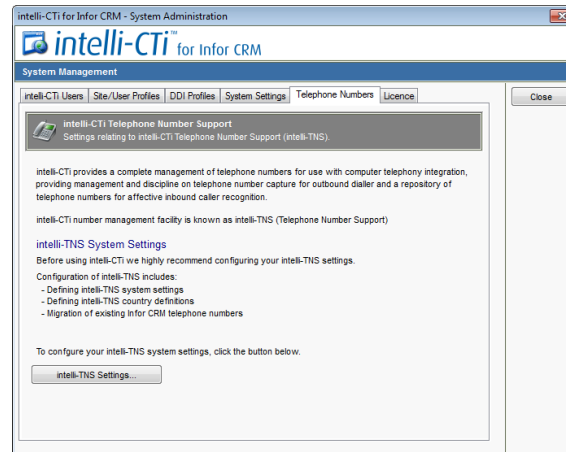
To access the Telephone Numbers tab:

1. From the intelli-CTi Navbar button, click the right mouse button and select **intelli-CTi System Settings…**

2. Click on the Telephone Numbers tab.

3. Click on the intelli-TNS Settings… button.
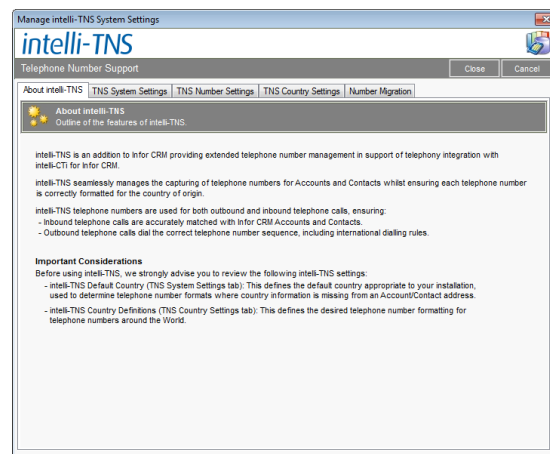
You can also access this screen from the Tools => Manage => intelli-TNS System Settings menu.

4. Click on the TNS System Settings tab.

TNS System Settings Tab

5. 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.

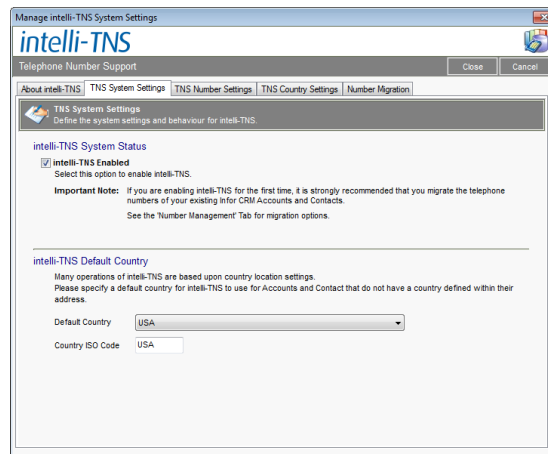6. Select a **Default Country** from the dropdown box. This country will be used if an Account or Contact does not specify a county in its address details.

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

7. Click on the TNS Number Settings tab.

TNS Number Settings Tab
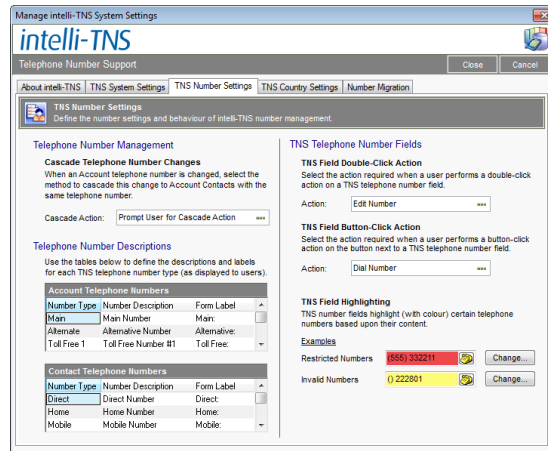
The TNS Number Settings tab does not apply to the intelli-CTi for Infor CRM Web Client integration.

TNS Country Settings Tab

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

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

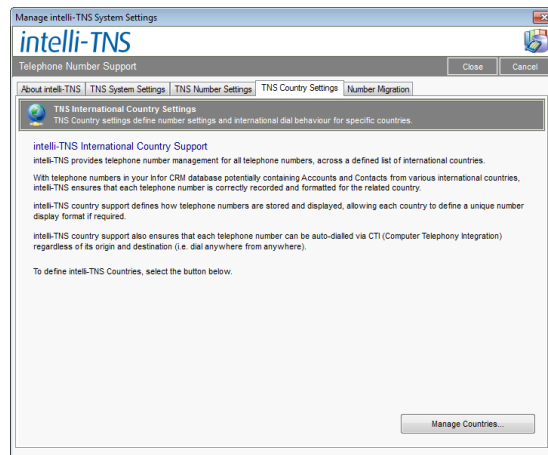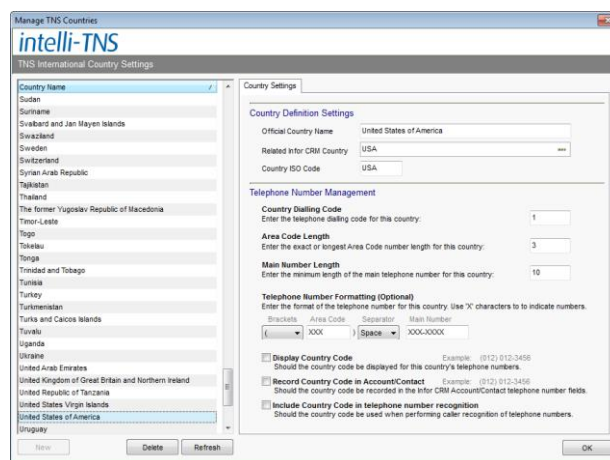9. Click on the required country in the **Country Name** column.

10. Type the Official Country Name.

11. Select the Related Infor CRM Country.

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

12. Enter the **Country Dialing Code** for this country.

13. Enter the exact or longest area code number length for this country in the **Area Code Length** box.

14. Enter the minimum length of the main telephone number for this country in the **Main Number Length** box.

15. 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.

16. If you require the country code to be displayed with the telephone number, check the **Display Country Code** check box.

17. 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.

18. 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.

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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.