

intelli-CTi[™] for Infor CRM

Version 4.2

Infor CRM Web Client User/Administrator Guide

Document Version 1.6



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intelli-CTI – Infor CRM Web User/Administrator Guide

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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 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 <u>www.intellicti.com/help</u>.

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 (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.

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 2 – Breeze sidebar expanded

intelli-CTi running within QGate Breeze



Figure 3 - intelli-CTi in Breeze

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

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

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

Incoming Calls

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

- If a match is established, intelli-CTi will automatically display the Associate Telephone Call dialog showing the Contact and/or Account in Infor CRM.
- If multiple Contacts are found to match (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.

📊 intelli-CTi Call Manager	»
 	+
intelli-CTi 🛛 🐔	intelli-CT
Im Virtual Telephony Server (V (VTS1)	9
Active Call List [1]	
Inbound 18005551234 🔊	
<multiple contacts=""></multiple>	
Ringing (00:01:05) 💽 🍘 🌈 🌍 🏈	
Mound Call	
Inbound Call	
-	
Infor CRM Caller Recognition	
Infor CRM Caller Recognition 18005551234	
Infor CRM Caller Recognition 18005551234 Related Contact(s)	
Infor CRM Caller Recognition 18005551234 Related Contact(s) John Abbott Abbott ttd, Job Title: President	
Infor CRM Caller Recognition 18005551234 Related Contact(s) <u>John Abbott</u> <u>Abbott Ltd.</u> Job Title: President E-mail: jabbot@abbott.demo	
Infor CRM Caller Recognition 18005551234 Related Contact(s) John Abbott Abbott ttd, Job Title: President	

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

							intelli-CTi Call Manager
	and the second se	Laspx?en ,D = C 🔤 Info	r CRM - Contact - Abb	×			4 8 444
nfor Infor CRM	Infor CRM	Recently Viewed New	Schedule Too	is Administration		6	intelli-CTi 🦷
nror infor CRM	Contact - A	bbott, John					A Urtual Telephony Server (VTS) (V)
SALES	Q. < Lookup R	sults Active Campaign					
Welcome	1			H 4 1 0		× @ → ▲ B	3125557854
Accounts	Name	John Abbott 🕜	Work:	(312) 555-7854	Primary Contact		President Abbott Ltd.
Contacts					for AccL		Established () () () () () () () () () () () () ()
Leads	Account	Abbott Ltd.	Fax:	(312) 555-7545	Authorized Service Contact		
Opportunities Sales Orders	Tibe	President +	Mobile	(312) 555-1234			
Activities	Asst	Ms. Jane Smith	Home	(312) 555-3543	Do not Solicit		
Calendar What's New	Dear.		Other:		Do not Email		l'anne in the second
Library Reports	Address	4206 W. Grand Suite 900 Chicago, IL 60651	Preferred Contact	Phone +	Do not Call		
Processes		USA	E-mail	jabbot@abbott. 🖂	Do not Mail		
intelli-CTi Products		< >	Web URL:	www.abbott.co	Do not Fax		
Packages	Owner:	Midwest	Cont. Type:	Decision Maker +			
	Acct. Mgr.	Hogan, Lee Q	Cont. Status:	Active -			
	Call History				intelli-	CTI for infor CRM	¢
MARKETING	-					Records 1	
SERVICE	Call Start Time	 Cal Duration Direct 	tion Call Result User	Activity Follow-Up Oppo	rtunity Campaign Lead	Source Call CLI	9
SUPPORT	6/18/2015	00.00.06 Outb	aund Established Hogan,			90013125557854	
ADMINISTRATION	6/18/2015	00.00.21 inbox	nd Established Hogan,			13125557854	
INTEGRATION	6/12/2015	00:00:42 Initos	nd Established Hogan,			13125557854	
covright © 2015 Infor All rights	1					Administrate	

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.

📙 intelli-CTi for Infor CRM - Telephone Call Wrapup
Intelli-CTi [™] for Infor CRM
Telephone Call Wrapup - Manage post telephone call actions and activities
Call Related Information
Call Direction (Result): Inbound (Established) Call Started (Duration): 23/06/2015 17:20 (00:01:04)
Call Association(s):
Related Call Activity/History Description/Regarding: Inbound (Established)
John called to discuss arrangements for a product demonstration. He needs to get an application installed ASAP. The VP for sales, Lou Balbo, needs to be copied in on all communications.
intelli-CTi [™] Open in Infor CRM Save and Close

- 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.

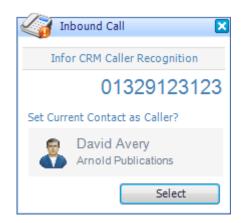
Scenario

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.
- 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.



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

🚺 intelli-CTi for Infor CRM - Telephone Call Wrapup	
Intelli-CTi [™] for Infor CRM	infor
Telephone Call Wrapup - Manage post telephone call actions and activities	
Call Related Information	
Call Direction (Result): Inbound (Established) Call Started (Duration): 24/06/2015 09:43 (00:01:37)	
Call As sociation(s):	
Related Call Activity/History	
Description/Regarding: Inbound (Established)	
Enter call notes here	complete activity
intelli-CTi [™] Open in Infor CRM	Save and Close

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

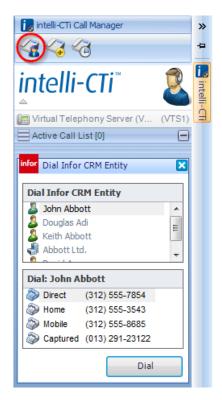
Making Outbound Calls

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.

ntelli-	CTi™				Ø	2
		issed Calls				
Call Start	Duration	Call End	Number	Call Info 1	Call In	
24/06/2015 09:44:47 24/06/2015 09:32:33		24/06/2015 09:46:24 24/06/2015 09:32:34	01329123123 01329123123	David Avery	Owner	
23/06/2015 17:20:19	00:01:04	23/06/2015 17:21:23	18005551234	John Abbott	President	
23/06/2015 17:16:13	00:03:06	23/06/2015 17:19:19	18005551234	John Abbott	President	
22/06/2015 17:38:52	00:00:00	22/06/2015 17:38:52	01329123122	John Abbott	President	
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			
					۰.	

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.

intelli-CTi Call Manager	»
	4
intelli-CTi 🛛 🙎	intelli-CTi
IIII Virtual Telephony Server (V (VTS1)	9
Active Call List [0]	
infor Dial Infor CRM Entity	
Dial Infor CRM Entity	
John Abbott	
🚨 Keith Abbott 📃	
Abbott Ltd.	
Dial: John Abbott	
Direct (312) 555-7854	
Home (312) 555-3543	
Mobile (312) 555-8685	
Captured (013) 291-23122	
Dial	

- 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.

🚺 intelli-CTi for Infor CRM - Telephone Call Wrapup		×
Intelli-CTi [™] for Infor CRM		infor
Telephone Call Wrapup - Manage post telephone call actions and activities		
Call Related Information		
Call Direction (Result): Outbound (Established) Call Started (Duration): 24/06/2015 09:54 (00:00:39)		
Call Association(s):		
Related Call Activity/History		
Description/Regarding: Outbound (Established)		
Enter call notes here	complete activ	₹ ity
intelli-CTi [™] Open in Infor CRM	Save and Clo	se

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

4		or CRN										Speed	Search Q
nfor Infor CRM	int	elli-CT	i Te	elephony Cal	l Mana	qer							
SALES		Call Activi				-							
			_										
Welcome													Records 1 -
Accounts	~		Ca	di Start Time	Ca	al Directio	on C	LI (CallerfD)		Call Duration (HMS)	Call Result	Account	Contact
Contacts		Dateits	67,	23/2015	Int	bound	3	125551238		00.00.00	Missed		
Leads			51	06 PM									
Opportunities		Details		23/2015	Ini	bound	3	175551238		00.00.00	Missed		
Sales Orders	12			35 PM									
Activities		Details		23/2015 XE PM	0.	dbound	9	001312555785		00.00.00	No Answer	Abbott Ltd.	Lou Balbo
Calendar	1.00	Details		23/2015		bound		125551234		00.00.00	Missed	(Abbott Ltd.)	[John Abb rd]
What's New		Lieurs		3 PM		ours.		120001204		90.00.00	Merseu	between cond	Promi service
Library	10	Details	60	23/2015	Int	bound		125557854		00.00.00	Missed	Pappone Las J	
Reports			6.0	0 PM									
Processes		Details	65	23/2015	01	thound	9	001012555785		00.00.21	Established	Abbott Ltd.	Los Dabo
 Intell-CTI 			- 5.0	02 PM									
Products		Details		23/2015	Ini	bound	3	125557854		00.03.42	Established	Abboll Ltd.	John Abbott
Packages			43	56 PM									
							drag	a tab here	to she	ow it in this area			
	My	Schedules	Call	More Tabs									
				-									
	E												Records 1 -
MARKETING	~	Complete	E:42	Due Date	Account	0	Senfact	Opportunity	Notes				
SERVICE		Complete	Cat	6/28/2015 12:00:05 AM	Reliant Partn	ers S	ichaubert, Do	6	Contact	s not interested in purchasing	now. Continue with regi	ular contact.	
SUPPORT		Complete	Edit	5/22/2015 12:00:05 AM	The Financial	Edge S	Silvera, Kurt		8th Step	of Seven Month Stretch Call N	io confirm product bulleti	in was received. Conf	irm contact's interest I
ADMINISTRATION	1												
INTEGRATION	1												

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.

Call	History								inte	elli-CTi	for Infor CRM	₿?
											Records	s 1 - 9 of 9
~	Call Start Time 🤸	Call Duration	Direction	Call Result	Contact	User	Activity	Follow-Up	Opportunity	Campaign	Call CLI	Call DDI
	6/23/2015	00:00:00	Outbound	No Answer	Balbo, Lou	Administrator					90013125557854	
	6/23/2015	00:00:21	Outbound	Established	Balbo, Lou	Administrator					90013125557854	
	6/23/2015	00:03:42	Inbound	Established	Abbott,	Administrator					3125557854	

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.

- **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.

Call	History								int	elli-CTi [®] f	or Infor CRM	₿?
											Records	1 - 4 of 4
~	Call Start Time 🗸	Call Duration	Direction	Call Result	User	Activity	Follow-Up	Opportunity	Campaign	Lead Source	Call CLI	Call DDI
	6/12/2015	00:00:42	Inbound	Established	Hogan, Lee						13125557854	
	6/18/2015	00:00:21	Inbound	Established	Hogan, Lee						13125557854	
	6/18/2015	00:00:06	Outbound	Established	Hogan, Lee						90013125557854	

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.

	Infor CRM	A Recently Viewed Nev	v Schedule To	ols Administration			Speeds	Search C
nfor CRM	intelli-C1	Ti Telephony Call I	Manager					
SALES	My Call Activ	rity						
Welcome								Records 1 -
Accounts	~	Call Start Time	Call Direction	CLI (CallerID)	Call Duration (HMS)	Call Result	Account	Contact
Contacts Leads	Details	6/23/2015	Inbound	3125551236	00:00:00	Missed		
		5:06 PM						
Opportunities Sales Orders	Details	6/23/2015 5:06 PM	Inbound	3125551236	00:00:00	Missed		
Activities	Details	6/23/2015 5:06 PM	Outbound	90013125557854	00:00:00	No Answer	Abbott Ltd.	Lou Balbo
Calendar What's New	Details	6/23/2015 5:03 PM	Inbound	3125551234	00:00:00	Missed	[Abbott Ltd.]	[John Abbott]
Library	Details	6/23/2015	Inbound	3125557854	00:00:00	Missed	[Abbott Ltd.]	
Reports Processes		5:03 PM						
intelli-CTi	Details	6/23/2015 5:02 PM	Outbound	90013125557854	00:00:21	Established	Abbott Ltd.	Lou Balbo
Products Packages	Details	6/23/2015 4:56 PM	Inbound	3125557854	00:03:42	Established	Abbott Ltd.	John Abbott
raukayes			d	rag a tab here to s	how it in this area			
	My Schedule	d Calls More Tabs						
								Records 1
MARKETING	✓ Complete	Edit Due Date Ac	count Contact	Opportunity Notes				
SERVICE	Complete	Edit 6/29/2015 12:00:05 AM Re	liant Partners Schaub	ert, Bob Conta	ct is not interested in purchasing	now. Continue with regi	alar contact.	
SUPPORT	Complete	Edit 5/22/2015 12:00:05 AM Th	e Financial Edge Stivers,	Kurt 8th Ste	ep of Seven Month Stretch Call to	confirm product bulleti	n was received. Confi	irm contact's interest
ADMINISTRATION								
INTEGRATION	1							

My Call Activity

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

							Records 1 - 10
	Call Start Time	Call Direction	CLI (CallerID)	Call Duration (HMS)	Call Result	Account	Contact
Details	6/24/2015 9:54 AM	Outbound	90013125557854	00:00:39	Established	Abbott Ltd.	John Abbott
Details	6/24/2015 9:54 AM	Outbound	90013125557854	00:00:06	Established	Abbott Ltd.	John Abbott
Details	6/24/2015 9:43 AM	Inbound	01329123123	00:01:37	Established	Arnold Publications	David Avery
Details	6/23/2015 5:23 PM	Inbound	01329123123	00:00:01	Established		
Details	6/22/2015 5:38 PM	Inbound	01329123122	00:00:00	Established	Abbott Ltd.	John Abbott
Details	6/22/2015 5:19 PM	Outbound	90013125557854	00:09:08	Established	Abbott Ltd.	John Abbott
Details	6/22/2015 5:04 PM	Outbound	90018883461222	00:07:56	Established	Flow Matic	Linda Alvare
Details	6/22/2015 5:02 PM	Outbound	90013605552505	00:01:03	Established	Computer Vaccuum	C. Toombs
Details	6/22/2015 4:26 PM	Outbound	90016125557693	00:00:07	Established	Mark Dan	Alex Ballard
Details	6/22/2015 3:51 PM	Outbound	90016125557693	00:14:09	Established	Mark Dan	Alex Ballard

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.

My Schedu	ed C	alls Mor	e Tabs			
						+
						Records 1 - 6 of 6
Complete	Edit	Due Date	Account	Contact	Opportunity	Notes
Complete	Edit	6/22/2015 3:25:15 PM	Mark Dan	Ballard, Alex		Alex expressed interest in our application and would like me to send him an information pack so he can discuss this with his boss. 11
Complete	Edit	6/22/2015 2:08:43 PM	Abbott Ltd.	Abbott, John		John called to discuss arrangements for a product demonstration. He needs to get an application installed ASAP. The VP for sales, Lou Balbo, needs to be copied in on all communications.
Complete	Edit	11/18/2010 4:54:00 PM	Abbott Ltd.	Abbott, John	Abbott Ltd Phase2	Call back when we have more info on the newest release of the equalization systems. The Pocket Pal Opportunity look like it's on track.
Complete	Edit	11/11/2010 2:46:00 PM	Abbott Ltd.	Balbo, Lou	Abbott Ltd Phase2	Make sure the financing is in place.
Complete	Edit	1/5/2009 12:00:05 AM	Reliant Partners	Schaubert, Bob		Contact is not interested in purchasing now. Continue with regular contact.
Complete	Edit	11/28/2008 12:00:05 AM	The Financial Edge	Stivers, Kurt		8th Step of Seven Month Stretch Call to confirm product bulletin was received. Confirm contact's interest level.

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:

🚺 intelli-CTi for Infor CRM	×
	infor
Configure the options for intelli-CTi for Infor CRM Web integration	
	-
Telephone Call History Define the recording of telephone call history information within Infor CRM.	
CRM Phone Call Activity/History Management	
intelli-CTi can automatically create CRM Phone Call History records within Infor CRM, associating them to Accounts, Contacts and/or Leads. (This feature applies to qualified telephone calls only)	
Select the management options required.	
Auto-create CRM Phone Call Activity	
Automatically create an Infor CRM Phone Call Activity with each intelli-CTi telephone call, associated to Accounts, Contacts and/or Leads.	
Auto-complete CRM Phone Call Activity	
Automatically mark new Infor CRM Phone Call Activities as 'Completed' (History).	
intelli-CTi Call History Management	h
intelli-CTi can automatically create detailed telephone call history information (call logging/tracking data) within Infor CRM for each related telephone call.	
Select the management options required.	
V Auto-create Account/Contact intelli-CTi Call History	
Log telephone calls for Infor CRM Accounts and Contacts in the intelli-CTi call history.	-
Ok Can	el

Connection options

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

QGate Integration for Infor CRM 🛛 🛛 💽
Q Gate Integration for Infor CRM Infor CRM
Configuration for the QGate Integration service for Infor CRM
Web Client Integration Options These options will affect the integration with Infor CRM Web dients
Chosen CRM Web Client Integration Select the Infor CRM web client integration to be used. Google Chrome
Connection Details The details of the Infor CRM Web connection to be used
To integrate with Infor CRM Web, an SData connection is required. Enter the Server Connection details, Proxy details (if applicable) and Infor CRM Login Credentials to connect to your SData service.
Infor CRM (SData) Server Connection The Server name and Port of your SData server
Server: *
Port: Secured Connection (HTTPS)
SData URL: http:///sdata/slx/dynamic/-/ Proxy Settings
Infor CRH User Credentials Please enter your Infor CRM Username and Password and click Test Windows Authentication Test Connection
Infor CRM Authentication Username: Password:
For troubleshooting issues: <u>Click here</u> Save Cancel

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

Manage intelli-TNS System	Settings				×			
					123			
intelli-TNS								
Telephone Number Supp	Telephone Number Support Close Cance							
About intelli-TNS TNS Syste	em Settings	TNS Number Settings	TNS Country Settings	Number Migration				
	ThS System Settings Define the system settings and behaviour for intell-TNS.							
intelli-TNS System St	tatus							
intelli-TNS Enabled Select this option to		HTNS.						
	Important Note: If you are enabling intelli-TNS for the first time, it is strongly recommended that you migrate the telephone numbers of your existing infor CRM Accounts and Contacts,							
	See the 'Number Management' Tab for migration options.							
	intelli-TNS a	re based upon country / for intelli-TNS to use fo		t that do not have a country	y defined within their			
Default Country	USA			-				
Country ISO Code	USA							

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

Manage intelli-TNS S						×
intelli-1	rns					5
					[Close Cancel
Define the n	NS System Settings T er Settings number settings and beh nber Management	VS Number Setting aviour of intelli-Th		Country Settings Number Migra r management. TNS Telephone Number		
When an Acco	ephone Number Char ount telephone number is cade this change to Acc re number.	s changed, select		TNS Field Double-Click Select the action required action on a TNS telephone Action: Edit Number	when a user p number field.	erforms a double-click
Use the tables	n: Prompt User for C nber Descriptions below to define the des telephone number type i	scriptions and lab		THS Field Button-Click J Select the action required action on the button next t Action: Dial Number	when a user p o a TNS telepho	
	ephone Numbers Number Description Main Number Alternative Number Toll Free Number #1	Form Label Main: Alternative: Toll Free:	*	THS Field Highlighting TNS number fields highligh numbers based upon their <u>Examples</u> Restricted Numbers		Certain telephone
	ephone Numbers Number Description Direct Number Home Number Mobile Number	Form Label Direct Home: Mobile:	•		222801	Change

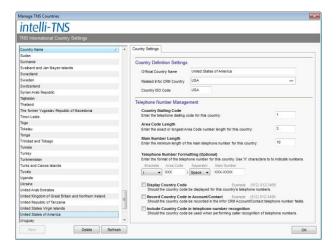
The TNS Number Settings tab does not apply to the intelli-CTi for Infor CRM Web Client integration.

TNS Country Settings Tab

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

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 International Country Settings TNS Country settings define number settings and international dial behaviour for specific countries.
intelli-TNS International Country Support
inteli-TNS provides telephone number management for all telephone numbers, across a defined list of international countries.
With telephone numbers in your Infor CRM database potentially containing Accounts and Contacts from various international countries, intelli-TNS ensures that each telephone number is correctly recorded and formatted for the related country.
intell-TNS country support defines how telephone numbers are stored and displayed, allowing each country to define a unique number display format if required.
intell-TNS country support also ensures that each telephone number can be auto-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

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.

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.