

Telephone Call Scenario: Receiving an Inbound Call

Telephone Call Manager

Telephone call control providing the ability to answer the incoming call

CRM Contact Information

Show the CRM Contact information of the caller in your Infor CRM

CRM Inbound Caller Recognition

The automatic recognition of inbound callers in your Infor CRM system

intelli-CTi - Associate Telephone Call

intelli-CTi™ for Infor CRM

Telephone Call Association
Would you like to associate this telephone call to a related entity in Infor CRM?

Select suggested call related Account/Contact or search for an alternative.

Next Action: Show Selected Entity [v] [Select] [Cancel]

Related Account: [Abbott Ltd.]

Contact Name	Title	Department	City
John Abbott	President	Administration	Chicago

All Contacts Find Contact... Find Account... Add New...

Inbound Call: 3125551234 [Answer Call]

DDI: Relating to:

intelli-CTi™ for Infor

Telephone Call History
These are all the telephone calls relating to this C

Call Start Time	Call Description
7/1/2015 17:26	
7/1/2015 17:12	

More Tabs... Notes/History Activities Literature Rec

Filter Options >> Edit / View Notes

Type	Date/Time	User Name	Co
Phone Call	7/1/2015 5:31:0	Administrator,	Abbott, John
Phone Call	7/1/2015 5:17:2	Administrator,	Abbott, John
Phone Call	7/1/2015 3:47:1	Administrator,	Abbott, John
Phone Call	6/23/2015 5:01:	Administrator,	Abbott, John
Phone Call	6/18/2015 3:11:	Hogan, Lee	Abbott, John
Phone Call	6/18/2015 3:09:	Hogan, Lee	Abbott, John

I have offered to ship a replacement immediately for which he was happy.

intelli-CTi Call Manager

Virtual Telephony Server (VTS) (VTS1)

Active Call List [1]

Inbound 3125551234

[John Abbott]
[Abbott Ltd.]

Ringing (00:00:11)

[Call Control Icons]

Telephone Call Scenario: Preview Dialing from CRM (Entity Detail)

Contact: John Abbott
Account: Abbott Ltd.
Title: President
Asst: Ms. Jane Smith
Address: 4206 W. Grand Avenue, Suite 900, Chicago, IL 60651 USA
E-mail: jabbot@abbott.demo
Web: www.abbott.com
Owner: Midwest, Acct. Mgr.: Hogan, Lee
Cont. Type: Decision Maker, Cont. Status: Active

Direct: (312) 555-7854
Mobile: (312) 555-1234
Fax: (312) 555-7545
Home: (312) 555-3543
Other: [Redacted]

CRM Contact Entity Dialing

An Infor CRM entity (e.g. CRM Contact) can be dialed with a single click, using the Call Number buttons adjacent to each telephone number.

Call History (Contact)

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Telephone Call History

These are all the telephone calls relating to this Contact.

Call Start Time	Call Description	Call Duration	Direction	Call Result	User	Related Activity	Follow-Up Action
7/1/2015 17:26		00:04:56	Inbound	Established	Administrator		
7/1/2015 17:12		00:04:18	Inbound	Established	Administrator		

More Tabs... | Notes/History | Activities | Literature Requests | Attachments | Lead Sources | Opportunities | Processes | Associations | Summary

Filter Options >> | Edit / View Notes | E-mail | Word | Refresh | Records shown: 17

Type	Date/Time	User Name	Contact Name	Result	Description
Phone Call	7/1/2015 5:31:0	Administrator,	Abbott, John	Complete	Inbound (Established)
Phone Call	7/1/2015 5:17:2	Administrator,	Abbott, John	Complete	Inbound (Established)
Phone Call	7/1/2015 3:47:1	Administrator,	Abbott, John	Complete	Outbound (Established)
Phone Call	6/23/2015 5:01:	Administrator,	Abbott, John	Complete	Inbound (Established)
Phone Call	6/18/2015 3:11:	Hogan, Lee	Abbott, John		Outbound Call (Established)
Phone Call	6/18/2015 3:09:	Hogan, Lee	Abbott, John		Inbound Call (Established)

Received a call from John to say that the handheld device we shipped him was damaged on arrival.

I have offered to ship a replacement immediately for which he was happy.

intelli-CTi Call Manager

Virtual Telephony Server (VTS) (VTS1)

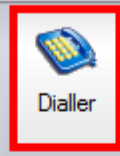
Active Call List [1]

Outbound 90013125551234

John Abbott
President
Abbott Ltd.

Ringing (00:00:03)

Telephone Call Scenario: Preview Dialing from CRM (List Dialing)



intelli-CTi Call Manager

Virtual Telephony Server (VTS) (VTS1)

Active Call List [1]

Outbound 90013125551234

John Abbott
President
Abbott Ltd.

Ringing (00:00:03)

Contacts 1 of 1094 All Contacts

Name	ACCOUNT	City	State	Work Phone	Mobile	E-mail	Acct. Manager	Owner
Abbott, John	Abbott Ltd.	Chicago	IL	(312) 555-7854	(312) 555-1234	jabbot@abbott.demo	Hogan, Lee	Midwest
Abbott, Keith	Full Systems	Elkton	MD	(410) 555-7250x226	(410) 555-3571	Keith@FullSystems.d	Barret, Dan	Northeast
Aberle, K	Gates Machine			(985) 555-8857	(985) 555-1888	K.Aberle@GatesMachine.de	Walsh, Linda	Southeast
Aceti, Janet	Sama Propety					Janet.Aceti@SamaPropety	Walsh, Linda	Southeast
Adamo, Juan	Summit & Co.					Juan.Adamo@Summit&Co	Co.de Martinez, Ed	Southwest
Adamo, Juan	Summit & Co.					Juan.Adamo@Summit&Co	Barret, Dan	Northeast
Adamo, Juan	Summit & Co.					Juan.Adamo@Summit&Co	Ekels, Georgine	Global
Adamo, Juan	Summit & Co.					Juan.Adamo@Summit&Co	Corp Walsh, Linda	Southeast
Adamo, Juan	Summit & Co.					Juan.Adamo@Summit&Co	utCo. Walsh, Linda	Southeast
Adi, D						Adi.D@	mlnte Hogan, Lee	Midwest
Aizav						Aizav@	keting Barret, Dan	Northeast
Alam						Alam@	nc.d Fuentes, Manuel	Southwest
Alexa						Alexa@	Hogan, Lee	Global
Alexa						Alexa@	Web Hogan, Lee	Midwest
Alfred						Alfred@	dem Hogan, Lee	Midwest
Aller						Aller@	uilder Walsh, Linda	Southeast
Aller						Aller@	demc Hogan, Lee	Midwest
Alliso						Alliso@	ures. Hogan, Lee	Midwest
Alme						Alme@	d.der Hogan, Lee	Midwest
Alvar						Alvar@	c.der Hogan, Lee	Midwest
Amal						Amal@	Kanlr Stichler, Hans	EMEA
Ancir						Ancir@	Martinez, Ed	Global
Ande						Ande@	m.de Stichler, Hans	EMEA
Ande						Ande@	onall Walsh, Linda	Southeast
Ande						Ande@	oBln Fuentes, Manuel	EMEA
Anderson, G.	Zefer May Industrial					G.Anderson@ZeferMayInd	ustri Walsh, Linda	Southeast
Anderson, James	Anderson Waste Sales					James.Anderson@Anderso	onWz Martinez, Ed	Southwest
Anderson, Rob	Hercules Depot Foods C					Rob.Anderson@Hercules	Depol Barret, Dan	Northeast
Androutsopoulou, Nicholas	Coca-Cola Hellenic					Nicholas.Androutsopoulou	Grant, Jean	Global
Andrus, Jeff	Sierra Mkg. Management					Jeff.Andrus@SierraMkg	tMan Martinez, Ed	Southwest
Anteby, Rebecca	GRI Inc.	Brooklyn	NY	(718) 555-1100	(718) 555-5360	Rebecca@GRIInc.d	Barret, Dan	Northeast
Anthony, Brian	DME Operations Company	Haverhill	MA	(508) 555-7376	(508) 555-5868	Brian@DMEOperati	Barret, Dan	Northeast
Anzalone, Larry	BMW Motors	Waltham	MA	(3046) 7069		Larry.Anzalone@BMW	Stichler, Hans	Global
Ariatti, Sam	Expansion Inc. Florida	Tustin	CA	(714) 555-2431	(714) 555-5959	Sam@ExpansionIncF	Martinez, Ed	Southwest

Infor CRM Dialer

The Infor CRM Dialer provides a list of CRM entities based upon the context of what is currently selected/active in Infor CRM.

Select the CRM entity you wish to dial along with the telephone number to be dialed.

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Abbott Ltd.

Account All Contacts Cancel

Account Contact:

Contact Name	Title	Primary
John Abbott	President	Yes

TNS Telephone Numbers: Manage... Dial

John Abbott

Number Type	Telephone Number	Restricted
Direct Number	(312) 555-7854	No
Mobile Number	(312) 555-1234	No
Home Number	(312) 555-3543	No
Contact Fax Number	(312) 555-7545	No

Telephone Call Scenario: Preview Dialing from Related CRM Entities



CRM Entity Related Dialing

It is possible to make telephone calls from related CRM entities such as CRM Tickets and CRM Opportunities, by calling from the entity's respective detail display within Infor CRM.

The CRM Account/Contact relating to the entity will appear in the Infor CRM Dialer, ready to be dialed.

This approach applies to both CRM Tickets and CRM Opportunities.

intelli-CTi - Dialer

intelli-CTi™ for Infor CRM

Abbott Ltd.

Account:

Account Contact:

Contact Name	Title	Primary
John Abbott	President	Yes

TNS Telephone Numbers:

John Abbott

Number Type	Telephone Number	Restricted
Direct Number	(312) 555-7854	No
Mobile Number	(312) 555-1234	No
Home Number	(312) 555-3543	No
Contact Fax Number	(312) 555-7545	No

Infor CRM Dialer

The Infor CRM Dialer provides a list of CRM entities based upon the context of what is currently selected/active in Infor CRM.

Select the CRM entity you wish to dial along with the telephone number to be dialed.

Automatic Call Association

When dialing from a related CRM entity (e.g. CRM Ticket), the related entity automatically becomes associated to the telephone call.

Telephone Call Scenario: In-call Contact Management

CRM Contact Information
 Show the CRM Contact information of the caller in your Infor CRM

Telephone Call Manager
 Telephone call control and in-call note capture capability

Contact: John Abbott
 Account: [Abbott Ltd.](#)
 Title: President
 Asst: Ms. Jane Smith
 Address: 4206 W. Grand Avenue, Suite 900, Chicago, IL 60651 USA
 Owner: Midwest | Acct. Mgr.: Hogan, Lee
 Cont. Type: Decision Maker | Acct. Type: Customer
 Cont. Status: Active | Acct. Status: Active

intelli-CTi Call Manager

Virtual Telephony Server (VTS) (VTS1)

Active Call List [1]

Inbound 3125551234

John Abbott
 President
 Abbott Ltd.

Established 00:01:30

Received a call from John to say that the handheld device we shipped him was damaged on arrival.

I have offered to ship a replacement immediately for which he was happy.

Call History (Contact)

intelli-CTi for Infor CRM

Telephone Call History
 These are all the telephone calls relating to this Contact.

Call Start Time	Call Description	Call Duration	Direction	Call Result	User	Related Activity	Follow-Up Action
7/1/2015 17:26		00:04:56	Inbound	Established	Administrator		
7/1/2015 17:12		00:04:18	Inbound	Established	Administrator		

More Tabs... | Notes/History | Activities | Literature Requests | Attachments | Lead Sources | Opportunities | Processes | Associations | Summary

Filter Options >> | Edit / View Notes | E-mail | Word | Refresh | Records shown: 17

Type	Date/Time	User Name	Contact Name	Result	Description
Phone Call	7/1/2015 5:31:0	Administrator,	Abbott, John	Complete	Inbound (Established)
Phone Call	7/1/2015 5:17:2	Administrator,	Abbott, John	Complete	Inbound (Established)
Phone Call	7/1/2015 3:47:1	Administrator,	Abbott, John	Complete	Outbound (Established)
Phone Call	6/23/2015 5:01:	Administrator,	Abbott, John	Complete	Inbound (Established)
Phone Call	6/18/2015 3:11:	Hogan, Lee	Abbott, John	Complete	Outbound Call (Established)
Phone Call	6/18/2015 3:09:	Hogan, Lee	Abbott, John	Complete	Inbound Call (Established)

Received a call from John to say that the handheld device we shipped him was damaged on arrival.

I have offered to ship a replacement immediately for which he was happy.

Telephone Call Scenario: Post Call Wrap-up

Infor CRM Call Wrap-up

Post each telephone call the Call Wrap-up dialog provides a summary of the call and the ability to further update and manage the telephone call within Infor CRM.

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Telephone Call Wrapup
Manage post telephone call actions and activities.

Complete Minimize

Association Account: **Abbott Ltd.** Contact: **John Abbott** Re-Associate...

Call Info Activity Management Campaigns/Lead Sources Opportunities Tickets

Call Statistics / Information
Statistical call data and related information about this telephone call.

Call Statistics

Call Direction (Outcome):	Inbound (Established)
Call Start Date/Time (Duration):	7/7/2015 11:29:24 AM (00:01:12)

Call Related Information

Call Description / Regarding:	Inbound Call (Established) ...
Call Category:	...
Call Result:	...

Received a call from John to say that the handheld device we shipped him was damaged on arrival.
I have offered to ship a replacement immediately for which he was happy.

CRM Activity Management

Each telephone call is automatically related to CRM Activity/History (Phone Call).

Notes taken during the call are featured here and can be updated, before automatically included within the CRM Activity/History.

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Virtual Telephony Server (VTS) (VTS1)

Active Call List [1]

Inbound 3125551234

John Abbott
President
Abbott Ltd.

Call Time: 17:26 - 17:31 (00:04:56)

Received a call from John to say that the handheld device we shipped him was damaged on arrival.
I have offered to ship a replacement immediately for which he was happy.

that the handheld device was damaged on arrival.
I have offered to ship a replacement immediately for

Call History (Contact)

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Telephone Call History
These are all the telephone calls related to this contact.

Call Start Time	Call Description
7/1/2015 17:26	
7/1/2015 17:12	

More Tabs... Notes/History Activities

Filter Options >> Edit / View

Type	Date/Time	User Name
Phone Call	7/1/2015 5:31:0	Administr
Phone Call	7/1/2015 5:17:2	Administr
Phone Call	7/1/2015 3:47:1	Administr
Phone Call	6/23/2015 5:01:	Administr
Phone Call	6/18/2015 3:11:	Hogan, Lee
Phone Call	6/18/2015 3:09:	Hogan, Lee

intelli-CTi – Infor CRM Call Activity Management

Navigate Edit View Insert New Activity Import/Export Search intelli-CTi

Contacts 1 of 1 **Lookup Results**

Contact: **John Abbott**

Account: [Abbott Ltd.](#)

Title: President

Asst: Ms. Jane Smith

Dear:

Address: 4206 W. Grand Avenue
Suite 900
Chicago, IL 60651
USA

Mailing:

Owner: **Midwest** Acct. Mgr.: **Hogan, Lee**

Direct: (312) 555-7854 Primary Contact for Acct.
 Mobile: (312) 555-1234 Authorized Service Contact
 Fax: (312) 555-7545 Preferred Contact: Phone
 Home: (312) 555-3543 Do Not Solicit Do Not Mail
 Other: Do Not Email Do Not Fax
 Do Not Call

E-mail: jabbot@abbott.demo
 Web: www.abbott.com

Cont. Type: Decision Maker Acct. Type: Customer
 Cont. Status: Active Acct. Status: Active

Drag a tab here to display a view

More Tabs... **Notes/History** Activities Literature Requests Attachments Lead Sources Opportunities Processes Associations Summary Call History (Contact)

Filter Options >> Edit / View Notes E-mail Word Refresh Records shown: 17

Type	Date/Time	User Name	Contact Name	Result	Description
Phone Call	7/1/2015 5:31:07 PM	Administrator,	Abbott, John	Complete	Inbound (Established)
Phone Call	7/1/2015 5:17:24 PM	Administrator,	Abbott, John	Complete	Inbound (Established)
Phone Call	7/1/2015 3:47:19 PM	Administrator,	Abbott, John	Complete	Outbound (Established)
Phone Call	6/23/2015 5:01:39 PM	Administrator,	Abbott, John	Complete	Inbound (Established)
Phone Call	6/18/2015 3:11:27 PM	Hogan, Lee	Abbott, John		Outbound Call (Established)
Phone Call	6/18/2015 3:09:38 PM	Hogan, Lee	Abbott, John		Inbound Call (Established)
Phone Call	6/12/2015 11:05:09 AM	Hogan, Lee	Abbott, John	Complete	Inbound (Established)
Phone Call	4/20/2007 8:41:19 PM	Hutchinson, Barb	Abbott, John		Info Requested
E-Mail	4/12/2007	Hogan, Lee	Abbott, John	Complete	Call Tickets for Abbott Ltd.
Meeting	4/11/2007 7:00:00 PM	Hogan, Lee	Abbott, John	Complete	Status Meeting
Phone Call	3/14/2007 6:30:00 PM	Hogan, Lee	Abbott, John	Complete	Won the deal
E-Mail	3/10/2007 11:35:00 PM	Hogan, Lee	Abbott, John	Complete	Proposal for Abbott Ltd.
To-Do	3/9/2007 6:38:46 PM	Lee Hogan	Abbott, John	Complete	Send proposal
Meeting	3/5/2007 7:00:00 PM	Pizzutti, Lou	Abbott, John	Complete	Onsite Meeting
Meeting	3/5/2007 6:37:14 PM	Lee Hogan	Abbott, John	Complete	Presentation

Received a call from John to say that the bag we shipped him was damaged on arrival.
I have offered to ship a replacement and he was happy.

Phone Call List

Here shows a complete list of telephone calls made and received to a CRM entity (Contact).

This activity list is automatically achieved through the call management of intelli-CTi.

CRM Activity Management

Each telephone call achieved using intelli-CTi is automatically recorded in the Infor CRM Activity/History, against each of the CRM entities the telephone call relates to (e.g. CRM User, Account, Contact, Lead, Opportunity, Ticket etc.).

intelli-CTi – Infor CRM Call Activity Management

CRM Phone Call Activity

Each telephone call achieved using intelli-CTi is automatically recorded in the Infor CRM Activity/History, against each of the CRM entities the telephone call relates to (e.g. CRM User, Account, Contact, Lead, Opportunity, Ticket etc.).

Edit Completed Phone Call for John Abbott

General | Attachments

Completed: 7/7/2015 12:18 PM | Scheduled: 7/7/2015 11:50 AM

Duration: 28 minutes | Timeless

Result:

Contact | Lead

Name: Abbott, John | Opportunity:

Account: Abbott Ltd. | Ticket: 001-00-000004

Regarding: Outbound Call (Established)

Location:

Notes...
Received a call from John to say that the handheld device we shipped him was damaged on arrival.
I have offered to ship a replacement immediately for which he was happy.

Priority: None | Category:

Leader: Administrator | Scheduled by Administrator on 7/7/2015 12:18 PM

Follow-Up: To-Do... | Carry Over Notes

Automatic Follow-Up: | Carry Over Attachments

CRM Phone Call Activity Detail

The details automatically captured within the CRM Phone Call Activity includes information about the call, any notes captured during the call, and any CRM entity relationships associated to the call (e.g. Regarding a Ticket).

History | Undo | Ticket | Defect | Attachment | ToDo | Note | Import Leads

Speed Search | Dialer | Search | intelli-CTi

Lookup Results

Contacts

Contact: John Abbott
Account: Abbott Ltd.
Title: President
Asst: Ms. Jane S
Dear:
Address: 4206 W. G
Suite 900
Chicago, IL
USA
Mailing:
Owner: Midwest

More Tabs... | Notes/History | Filter Options >>

Date/Time					
Phone Call	7/7/2015 1:41				
Phone Call	7/7/2015 12:18				
Phone Call	7/7/2015 11:36				
Phone Call	7/1/2015 5:31				
Phone Call	7/1/2015 5:17				
Phone Call	7/1/2015 3:47				
Phone Call	6/23/2015 5:0				
Phone Call	6/18/2015 3:1				
Phone Call	6/18/2015 3:09				
Phone Call	6/12/2015 11:0				
Phone Call	4/20/2007 8:4				
E-Mail	4/12/2007	Hogan, Lee	Abbott, John	Complete	Call Tickets for Abbott Ltd.
Meeting	4/11/2007 7:00:00 PM	Hogan, Lee	Abbott, John	Complete	Status Meeting
Phone Call	3/14/2007 6:30:00 PM	Hogan, Lee	Abbott, John	Complete	Won the deal
E-Mail	3/10/2007 11:35:00 PM	Hogan, Lee	Abbott, John	Complete	Proposal for Abbott Ltd

Tuesday, July 7, 2015 2:28 PM | Administrator | SALESLOGIX_EVA

intelli-CTi for Infor CRM – CTi Call History

Infor CRM - [Contact: John Abbott]

File Edit View Insert Schedule Lookup Write Tools Window Help

Back Forward History Navigate Save Copy Undo Edit List/Detail View Contact Contract Lead Opportunity Ticket Insert Phone Call Meeting ToDo New Activity Note Complete E-Mail Add Contact To Outlook Export Group To Excel Import Leads Import/Export Speed Search Search Intelli-CTi Dialer

Sales **Contacts** 1 of 1 Lookup Results

Contact: John Abbott
 Account: Abbott Ltd.
 Title: President
 Asst: Ms. Jane Smith
 Dear:
 Address: 4206 W. Grand Avenue Suite 900 Chicago, IL 60651 USA
 Mailing:
 Owner: Midwest Acct. Mgr.: Hogan, Lee
 Direct: (312) 555-7854
 Mobile: (312) 555-1234
 Fax: (312) 555-7545
 Home: (312) 555-3543
 Other:
 E-mail: jabbot@abbott.demo
 Web: www.abbott.com
 Cont. Type: Decision Maker Acct. Type: Customer
 Cont. Status: Active Acct. Status: Active

Call History (Contact)

intelli-CTi™ for Infor CRM

Telephone Call History
 These are all the telephone calls relating to this Contact.

Call Start Time	Call Description	Call Duration	Direction	Call Result	User	Related Activity
7/7/2015 11:50	Outbound Call (Established)	00:27:40	Outbound	Established	Administrator	
7/7/2015 11:29	Inbound Call (Established)	00:01:12	Inbound	Established	Administrator	
7/1/2015 17:26		00:04:56	Inbound	Established	Administrator	
7/1/2015 17:12		00:04:18	Inbound	Established	Administrator	
7/1/2015 15:47		00:00:03	Outbound	Established	Administrator	

More Tabs... Notes/History Activities Literature Requests Attachments Lead Sources Opportunities Processes Associations Summary Call History

Filter Options >> Edit / View Notes E-mail Word Refresh Records shown: 20

Type	Date/Time	User Name	Contact Name	Result	Description
					Received a call from John to say that the handheld

Call History
(for Contact)

A complete list of
intelli-CTi Call History
for a CRM Contact.

intelli-CTi
"Call History"

For each CRM entity that
relates to telephone activity
(e.g. CRM Accounts, Contacts,
Leads, Tickets, Opportunities),
intelli-CTi provides a detailed
log of each telephone call
interaction.

intelli-CTi for Infor CRM – CTi Call History Detail

intelli-CTi - Telephone Call Wrapup

intelli-CTi™ for Infor CRM

Telephone Call Wrapup
Manage post telephone call actions and activities.

Association
Account: **Abbott Ltd.**
Contact: **John Abbott**

Call Info | Activity Management | Campaigns/Lead Sources | Opportunities | Tickets

Call Statistics / Information
Statistical call data and related information about this telephone call.

Call Statistics

Call Direction (Outcome):	Outbound (Established)
Call Start Date/Time (Duration):	7/7/2015 11:50:38 AM (00:27:40)

Call Related Information

Call Description / Regarding: **Outbound Call (Established)**

Call Category:

Call Result:

Received a call from John to say that the handheld device we shipped him was damaged on arrival.
I have offered to ship a replacement immediately for which he was happy.

Call History (Contact)

Call Start Time	Call Description
7/7/2015 11:50	Outbound Call
7/7/2015 11:29	Inbound Call
7/11/2015 17:26	
7/11/2015 17:12	
7/11/2015 15:47	

More Tabs... Notes/History

Filter Options >>

Type	Date/Time
Phone Call	7/7/2015 1:41:30
Phone Call	7/7/2015 12:18:30
Phone Call	7/7/2015 11:36:30 Administrator Abbott, John Inbound Call (Established)
Phone Call	7/11/2015 5:21:00 Administrator Abbott, John Complete Inbound (Established)

intelli-CTi "Call History"

intelli-CTi automatically records a detailed record within Infor CRM of each telephone call made or received, relating to one or more CRM entities.

Call Relationships

Each Call History item can be linked to multiple CRM entities.

Call Statistics

Each Call History item recorded within CRM has detailed statistics about the call.

These provide valuable data for auditing, reporting and analysis.


Call Notes


Any notes captured during the call are automatically logged.

intelli-CTi Reporting

intelli-CTi for Infor CRM the ability to report based upon the rich content of call tracking data within Infor CRM, captured by intelli-CTi.

intelli-CTi - Call Statistics x


intelli-CTi™ for Infor CRM
Call Statistics

 **Telephony Team Call Statistics**
Calculate
Close

Telephony Call Statistics provide a summary of telephony activity.

Date Range: Start Date/Time: End Date/Time:

User Selection: All Users Specific User

Call Statistics Report

intelli-CTi For Infor CRM - Call Statistics Report

Report Range: 4/1/2015 1:00 AM to 7/9/2015 1 23:59 Telephony User: All Users

Call Ratios		Call Timings	
Call Types		Call Times	
Inbound Calls	20	Average Call Length	00:03:29
Outbound Calls	12	Average Wrapup Time	00:00:52
Call Results		Total Call Time	01:51:56
Established Calls (Inbound/Outbound)	21	Most Active Call Time (User)	Administrator
Unanswered Calls (Outbound)	2	Shortest Call	
Missed Calls (Inbound)	9	User	Administrator
Busy Calls (Outbound)	0	Call Duration	00:00:03
Invalid Numbers (Outbound)	0	Longest Call	
<hr/>		User	Administrator
Total Calls	32	Call Duration	01:01:35