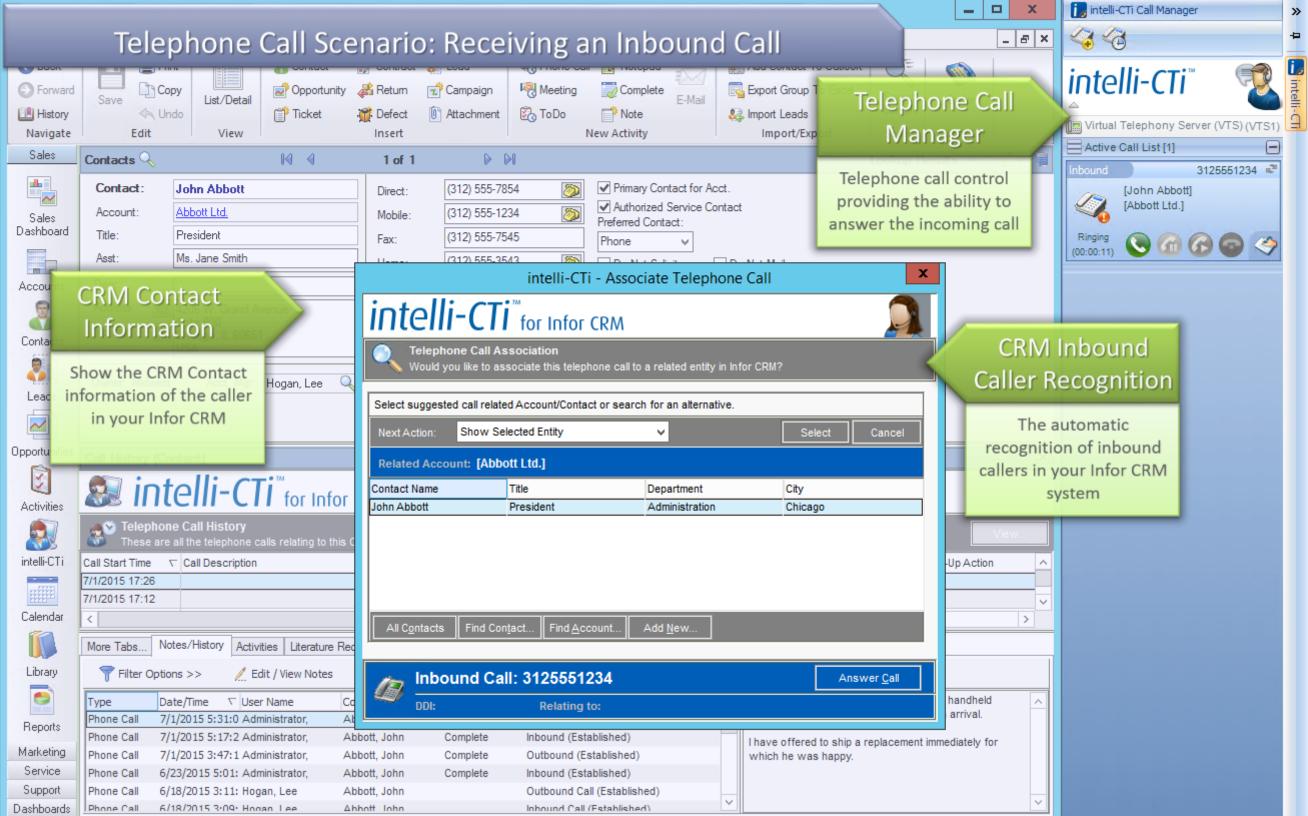
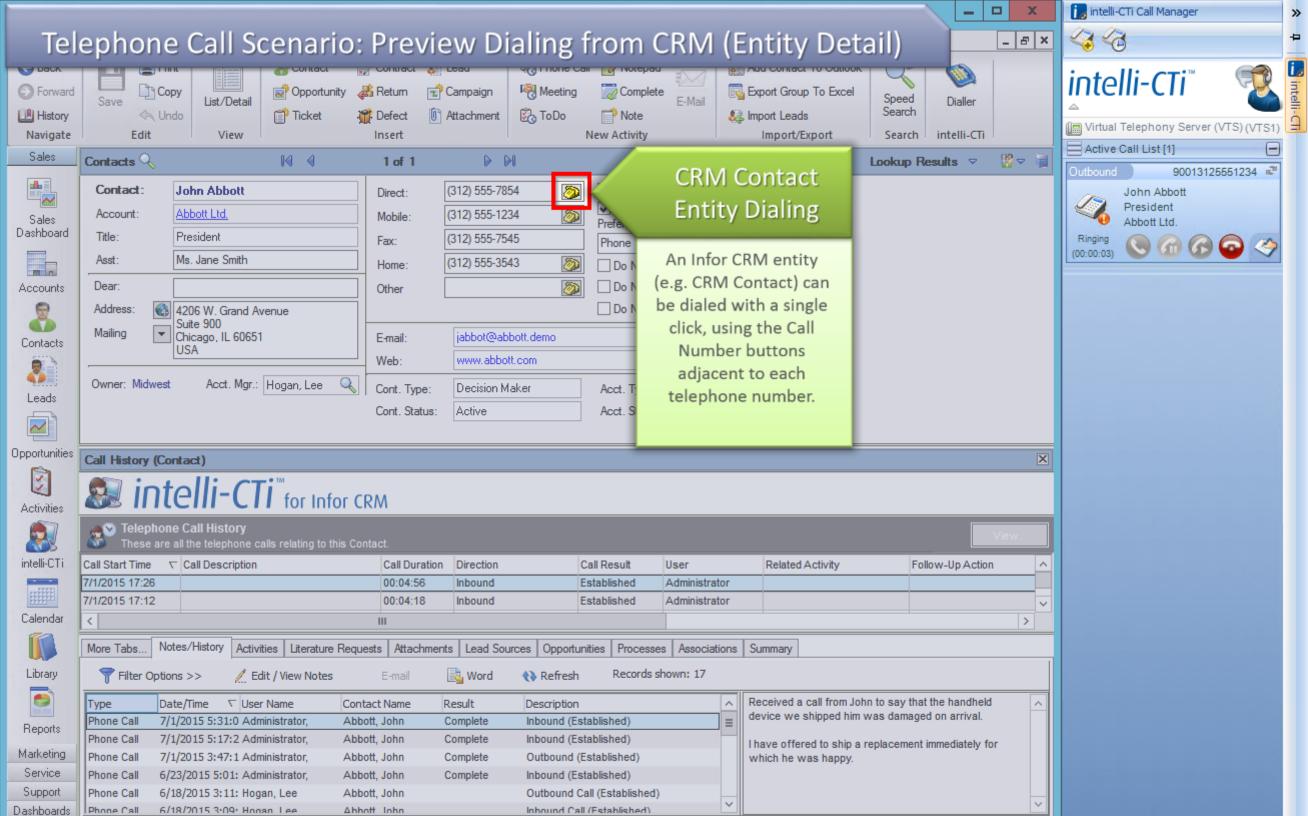


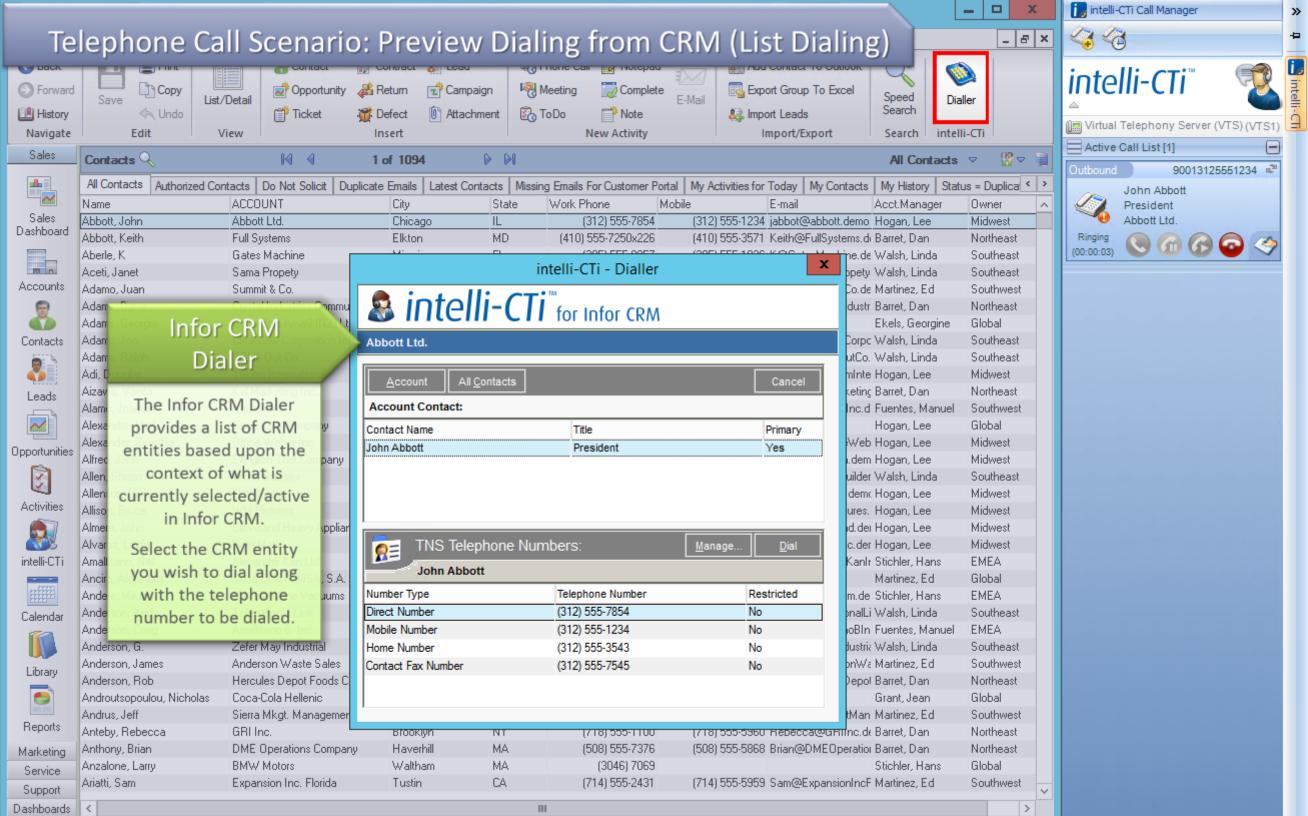


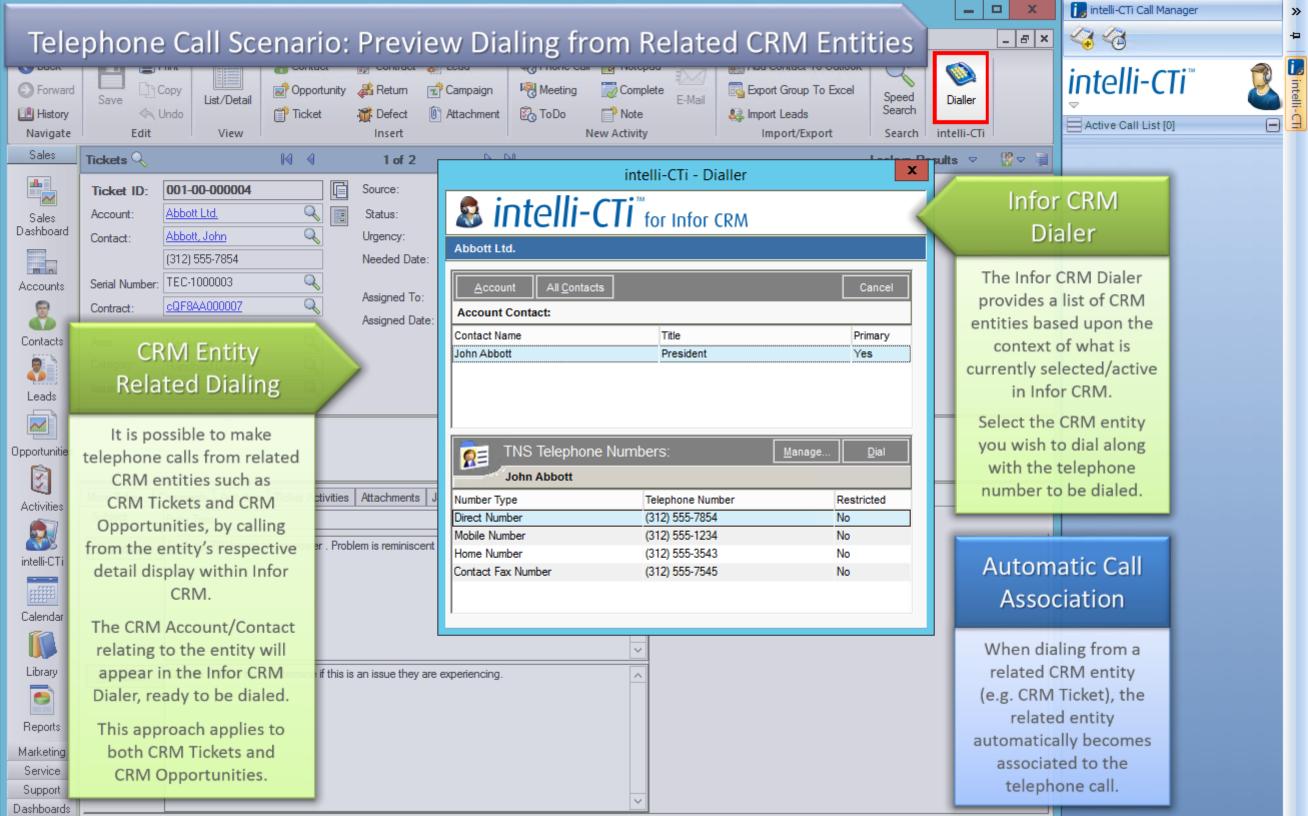
Product Tour (LAN)

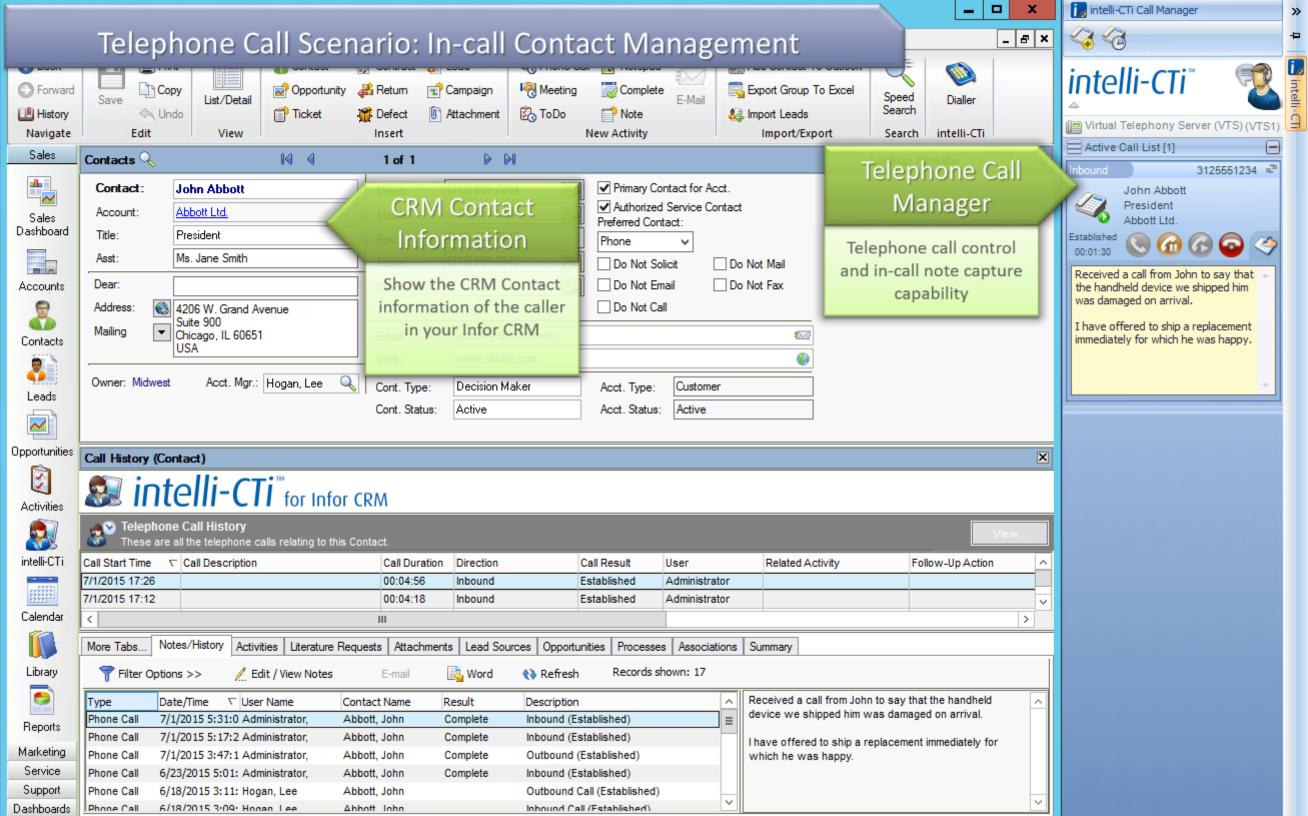


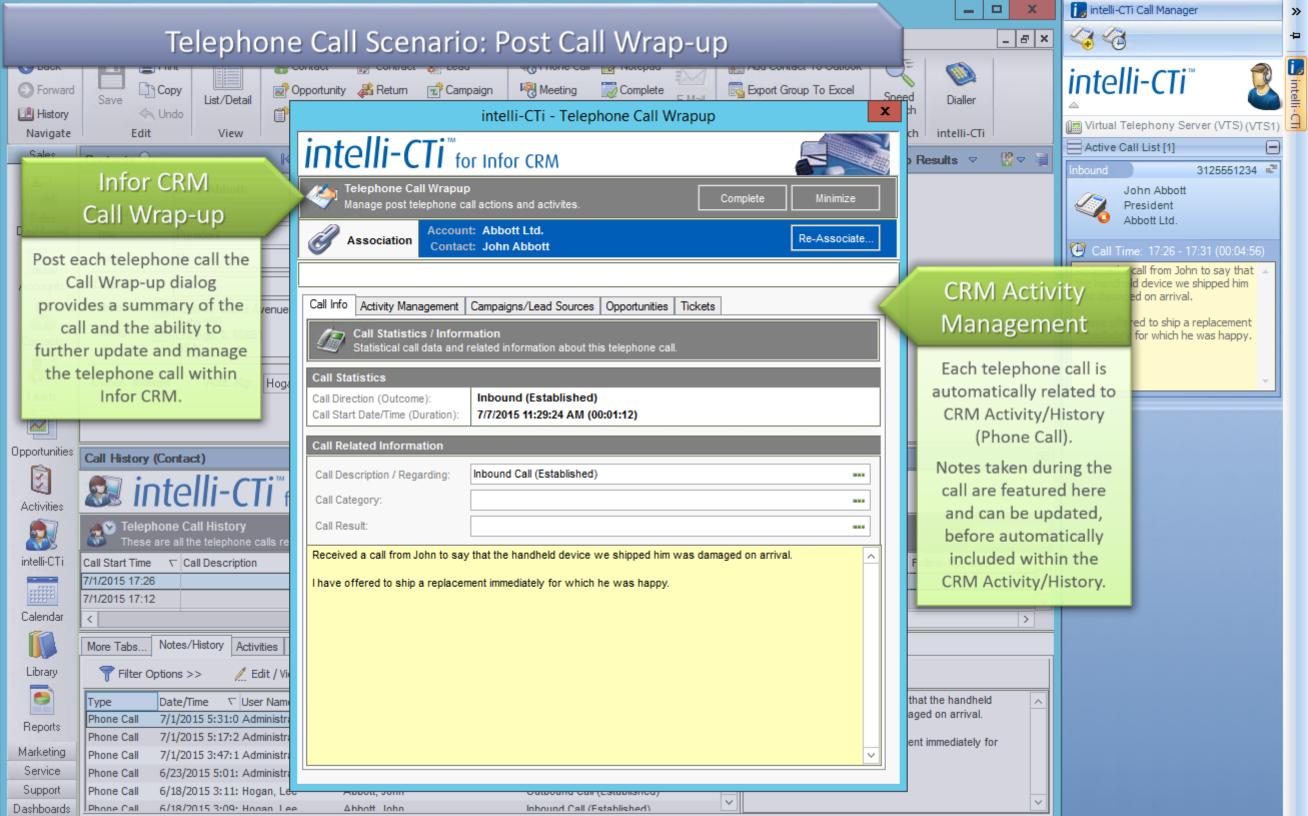










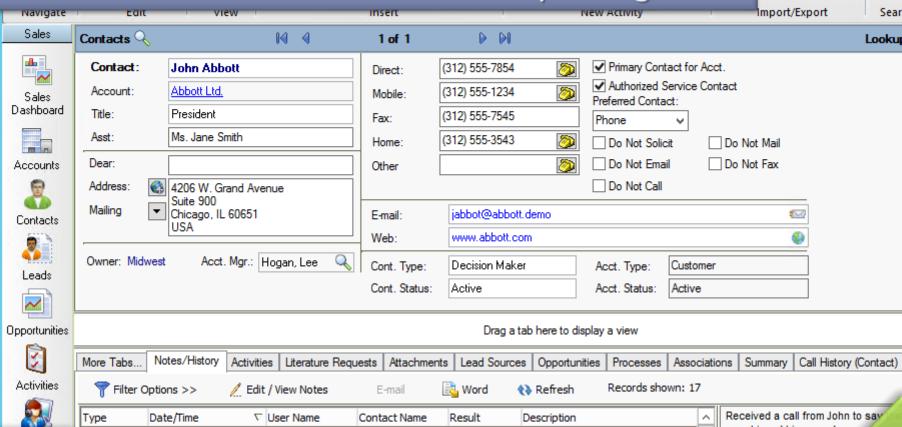


intelli-CTi – Infor CRM Call Activity Management

port Group To Excel ort Leads mport/Export

(III) Speed Dialler Search intelli-CTi Search

₩ マ



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.

Received a call from John to say we shipped him was damage

I have offered to ship a replacen. he was happy.

Administrator

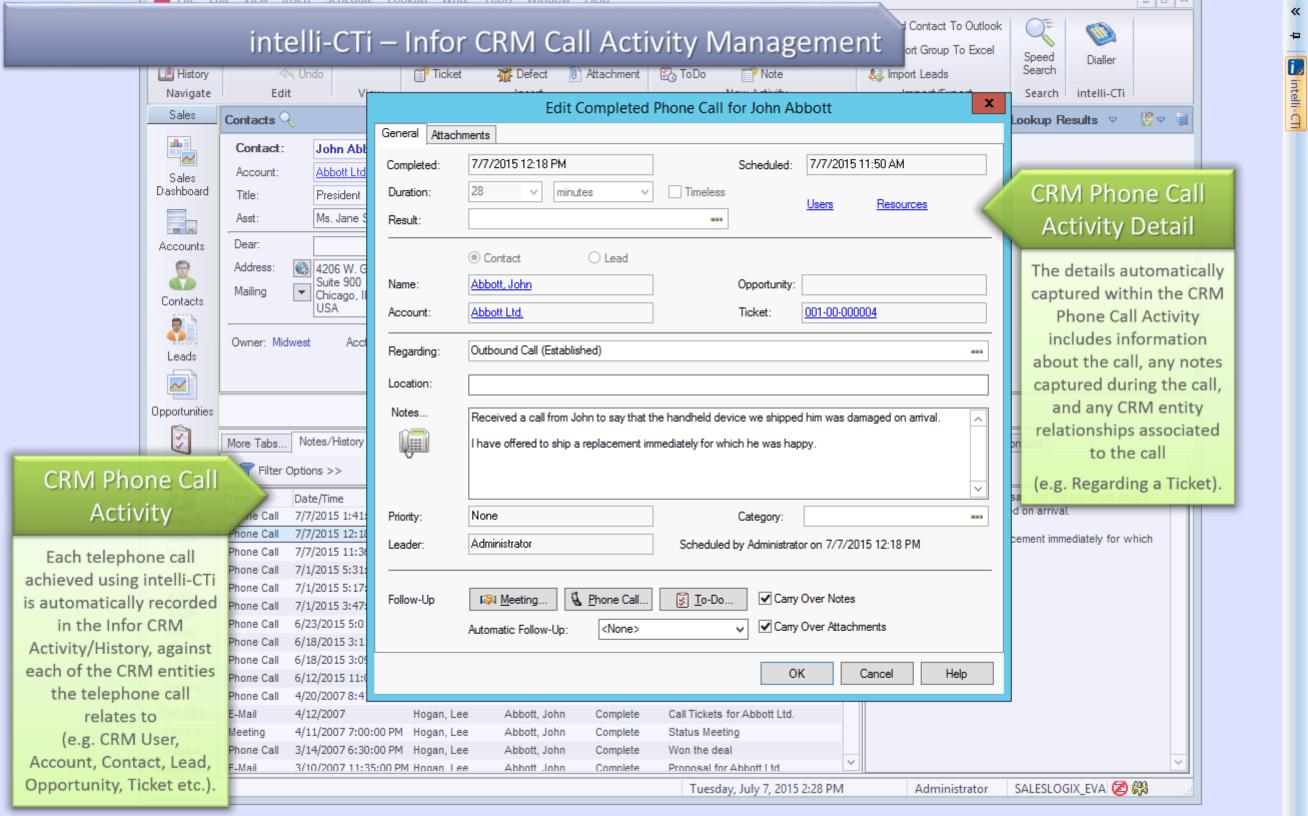
SALES

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.).

7/1/2015 5:31:07 PM Phone Call Administrator, Abbott, John Complete Inbound (Established) hone Call 7/1/2015 5:17:24 PM Administrator, Abbott, John Complete Inbound (Established) none Call 7/1/2015 3:47:19 PM Abbott, John Complete Outbound (Established) Administrator, Phone Call 6/23/2015 5:01:39 PM Administrator, Abbott, John Complete Inbound (Established) Phone Call 6/18/2015 3:11:27 PM Abbott, John Outbound Call (Established) Hogan, Lee 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 Abbott, John Call Tickets for Abbott Ltd. Hogan, Lee Complete Meeting 4/11/2007 7:00:00 PM Hogan, Lee Abbott, John Complete Status Meeting Won the deal Phone Call 3/14/2007 6:30:00 PM Hogan, Lee Abbott, John Complete E-Mail 3/10/2007 11:35:00 PM Hogan, Lee Abbott, John Complete Proposal for Abbott Ltd. To-Do Send proposal 3/9/2007 6:38:46 PM Lee Hogan Abbott, John Complete 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 .lohn Presentation Complete

Tuesday, July 7, 2015 11:41 AM





interaction.

 \wedge

Received a call from John to say that the handheld

intelli-CTi for Infor CRM – CTi Call History

📅 Filter Options >>

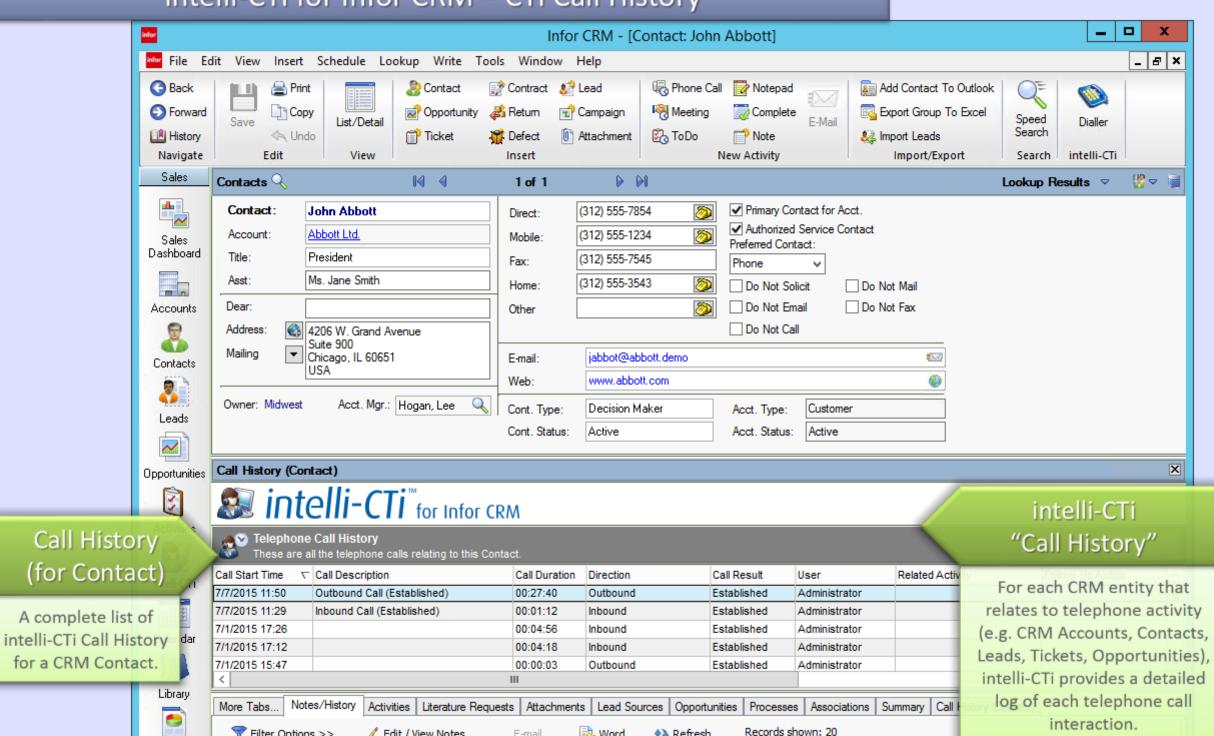
Date/Time

Type

Reports

Edit / View Notes

∇ User Name



Word

Result

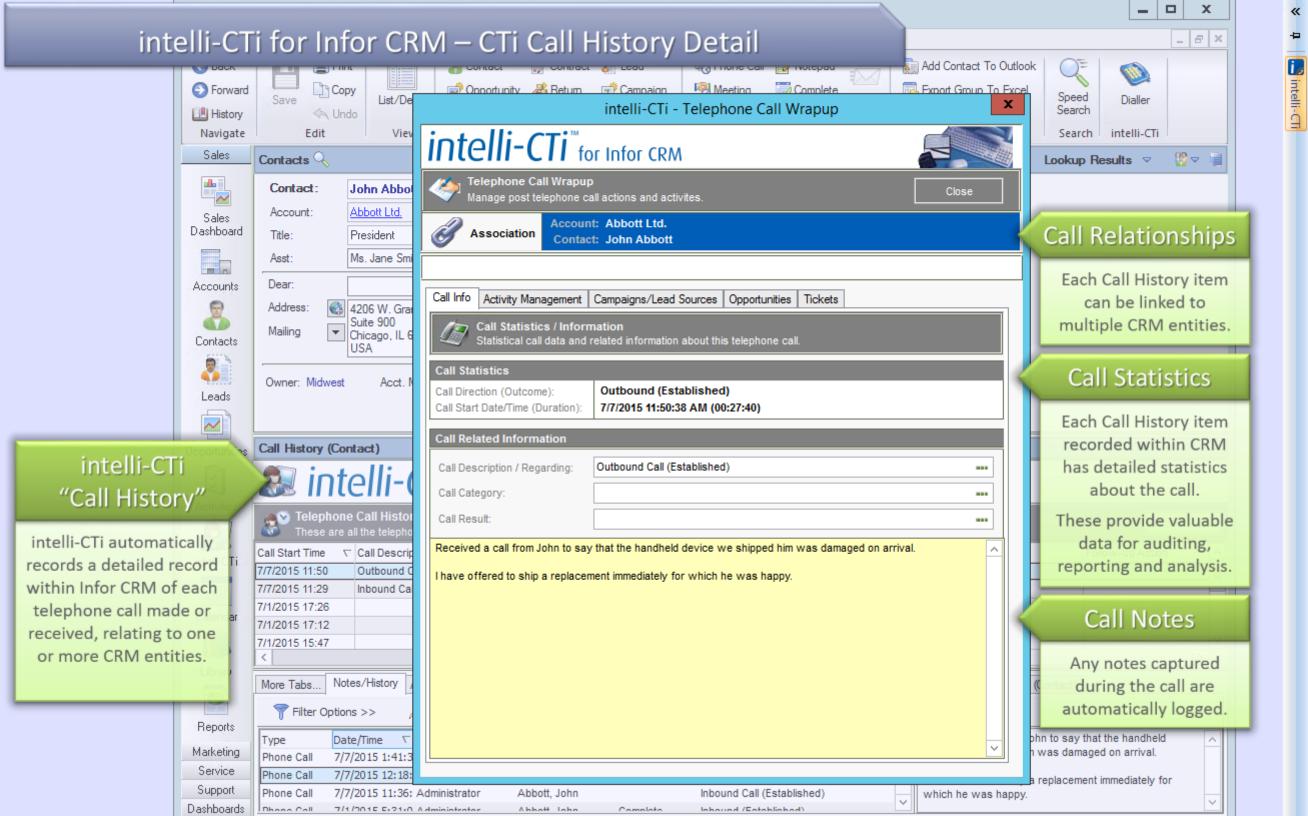
E-mail

Contact Name

♦ Refresh

Description

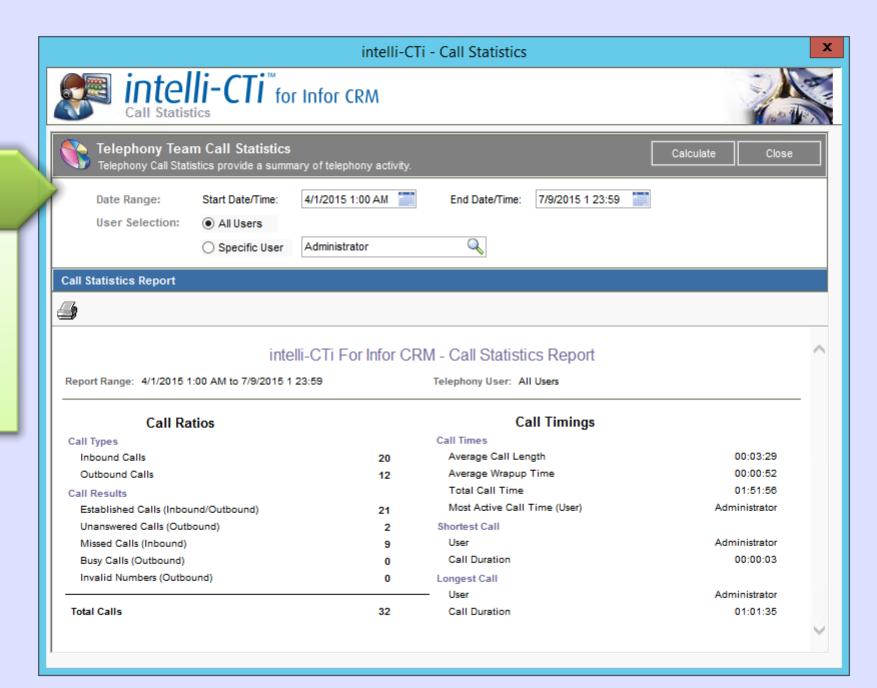
Records shown: 20



intelli-CTi for Infor CRM – Reporting

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 for Infor CRM

