



intelli-CTi™ for SalesLogix



What is intelli-CTi for Sage SalesLogix Web?

Following in the footsteps of the successful Sage SalesLogix LAN client integration; **intelli-CTi for Sage SalesLogix Web** includes a fresh new look, offering a seamless blend of telephony integration with your Sage SalesLogix Web application. Features include:

- ✓ **Incoming call qualification** – Automatically link incoming calls with Sage SalesLogix Accounts and Contacts
- ✓ **Screen popping/alerting** – Show relevant CRM information whenever you make or receive a telephone call
- ✓ **Click to dial capability** – Increase the speed and accuracy of outbound calls
- ✓ **Call logging** – Record and track call history against CRM Accounts and Contacts
- ✓ **Call statistics information** – Provides powerful business data for reporting of CRM telephony activity
- ✓ **In-Call Notes** – Make notes during the call and automatically record to SalesLogix
- ✓ **Utilising SData Interface** – Direct communication to Sage SalesLogix via Sage RESTful web services

Call Manager

The intelli-CTi Call Manager, which is docked onto the Windows Desktop provides a complete call management interface.

As well as displaying call-related information, the Call Manager also provides call control buttons, which integrate directly with your telephone system and Sage SalesLogix.

When idle, the Call Manager collapses to a compact side-bar to allow full use of Sage SalesLogix. Upon detecting telephone call activity, the Call Manager panel automatically expands to provide you with valuable call-related information.

Call History

The Call History tab in Sage SalesLogix displays all calls that have been logged against Accounts, Contacts and Users.

At a higher level; the Call Manager screen in Sage SalesLogix provides a complete history of all calls recorded for the current user.

Call Information Panel

Each telephone call is graphical represented by a Call Information Panel, which gives you up-to-date information about the telephone call.

Call Information Panels also give you full call control, so that you can perform actions such as: Answer, Hold/Resume and Hang up the call directly from your Desktop.

The Call Information Panel also allows you to enter notes directly onto the call at the click of a button. These in-call notes will then be automatically recorded against the telephone call in SalesLogix.

At the end of each telephone call, the Call Information Panel will expand to show some call statistics (start/end time, duration etc.). This information (and more) is also recorded in the SalesLogix database against the related Account/Contact and User.

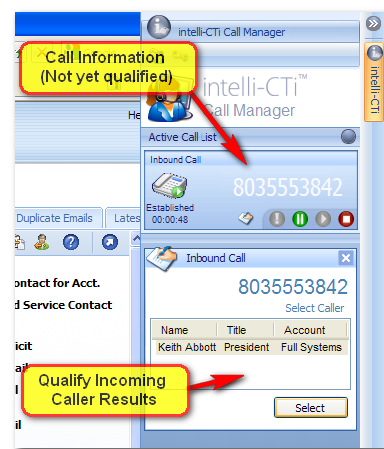
Incoming Call Management

Incoming calls are displayed as call alerts within the intelli-CTi Call Manager (opposite).


When a call comes in; the intelli-CTi Call Manager automatically expands, showing:

- A call qualification panel showing potential callers (from Sage SalesLogix using the incoming call's caller ID).
- A Call Information Panel, which details the active call.

The user can select the appropriate contact from the qualified call results. This will update the Call Information Panel with the Account or Contact's details and automatically navigate SalesLogix to the qualified Account/Contact.



Outgoing Call Management

Outbound calls can be made by using either the Call Contact button (shown opposite) or by the Dial Number button: 

The Call Contact button provides a list of telephone numbers for the current Account or Contact shown within Sage SalesLogix.

Simply select the desired telephone number and click Dial.

