ONBOARDING CUSTOMERS ON TENFOLD

TENFOLD DASHBOARD AND FEATURES REVIEW

Onboarding Customers on Tenfold

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The next section will review the process of onboarding a customer and the various functionality that should be explained to the customer. Ensure that you cover all aspects of the following checklist to verify that your customer is set up for success

Onboarding Process Checklist

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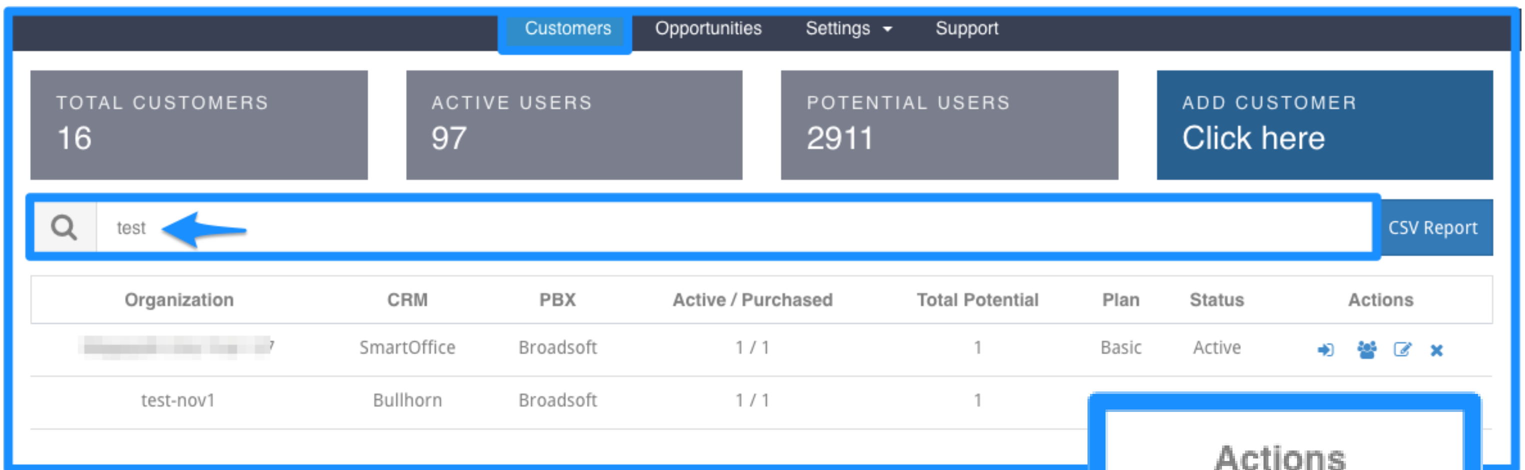
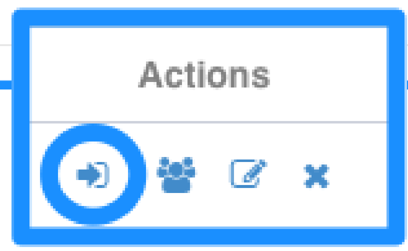
Onboarding Process

This document is to explain the process of connecting the CRM and Phone systems within the Tenfold dashboard, as well as help train the administrators managing the Tenfold dashboard. A few assumptions to start this portion of the document include that a customer has been sold on the Tenfold product and created within the Tenfold partner portal.

Accessing the Customer





Navigate to the Customer tab within the partner portal and search for the sold customer. Select the arrow icon to log in as the administrator assigned to the account. From here, you can begin the process of integrating the phone and CRM system.

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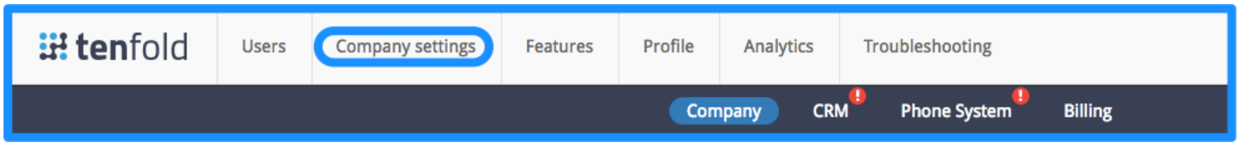
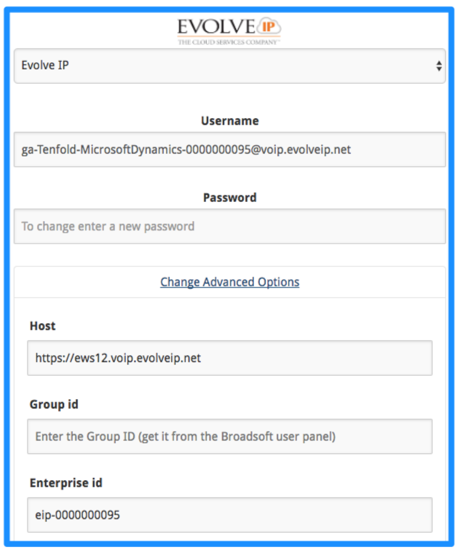
Connect the phone system

Navigate to the Company Settings tab within the dashboard and select Phone System. Enter the requested information and refer to the Phone System Connection Guide for specific set up instructions based on the phone system you are connecting.



Evolve IP Requirements



- Username
- Password
- Host
- Enterprise ID
- Group ID (not always required)

If you have both the Group and Enterprise ID please enter; keep in mind that the Group ID will limit the available users to those included in the Group. If the entire organization should be utilizing the tool, please only enter the Enterprise ID.

Connect the CRM

Navigate to the Company Settings tab within the Tenfold dashboard and select CRM. Enter the requested information and refer to the below information for specific set up instructions based on the CRM you are connecting. Many CRM connections require that the information is entered on the client's workstation, ensure that the necessary preparations are taken to accomplish this if you are onboarding on behalf of the end client.

Autotask

- Admin Username:
- Admin Password:
- Webservice URL:

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Bullhorn

- Admin Username:
- Admin Password:
- Advanced Options:
  - Bullhorn UI Url

Connectwise

- Host:
- Company ID:
- Public Key:
- Private Key:

Google Apps

Since Google Apps must be configured on a 'per user' basis, each user will be required to authenticate on their account under their Profile tab. We will need the Google Apps Administrators Username and Password to enter initially and then each user will need to log in once they gain access to the dashboard.

Infusionsoft

- API Key:
- Infusionsoft URL:

Use the documentation found at https://www.tenfold.com/support-center/connect-infusionsoft/ to help complete these steps.

MS Dynamics

On premise version must be internet facing, we do not support internal facing at this time.

- Admin Username:
- Admin Password:
- Hostname: (URL used to connect to MS Dynamics):

Netsuite

There are a few additional steps that must be taken in order to successfully integrate with Netsuite.

- Admin Email:
- Admin Password:
- Account ID:
- The customer must also have the admin access to their Netsuite to do the following:
  1. Add Scripts to Netsuite
  2. Set up RESTlet Endpoints
  3. Save Endpoints in Tenfold Dashboard

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Use the documentation found at https://www.tenfold.com/support-center/netsuite-restlet to help complete these steps.

- Advanced Settings
  - For clients outside of the USA, you will need to update the system region and date format under the Advanced Options portion of the phone connection credentials.
    - The system region is always a three letter denominator that indicates geo region (na1, eu2, etc) and can be found embedded in the Netsuite Url setup during the Restlet process.
      I.e. http://rest.**na1**.netsuite.com/app/site/hosting……

    This will ensure that when selecting an account name or contact name within the UI, the specific record opens within the CRM.

    - As well, to keep date formats consistent with the region of the client, input in the Date Format either DD/MM/YY or /MM/DD/YY

Oracle

We only support Oracle Sales Cloud and no other instances of Oracle at this time

- Admin Username:
- Admin Password:
- Server:

Salesforce and Salesforce Lightning

Due to IP restrictions and multifactor authorization for Salesforce logins, the credentials will need to be provided on a live screen share and entered from the customer's workstation, or by the customer on their own time. The customer contact should have access to their Salesforce administrator's **username and password**, and this admin account should have read and write access to Salesforce.

SugarCRM

- Admin Username:
- Admin Password:
- Sugar Root URL:
- Sugar Version:
- Advanced Options:
  - API Version

Zendesk

- Admin Username:
- Admin Password:
- Hostname:

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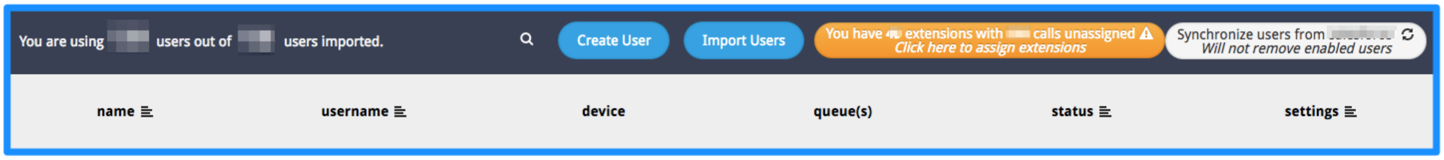
Administrative Training

This section assumes that the reader will be training the end clients' appointed administrator for the Tenfold dashboard and its connections. After you have confirmed that the CRM and Phone System are connected, review the below information with your customer's administrator.

User Management

When training the end user administrator, after confirming that both phone system and CRM are connected, navigate to the Users tab and review the following functionalities.

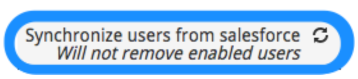
Below are the headers for the information available in the Users tab.



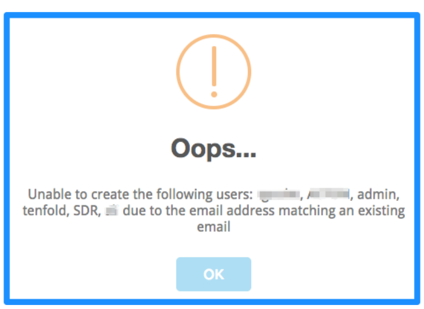
Some general settings for the Users tab include sorting by name, username, and status. Click on the header for each to sort alphabetically. Those who are enabled will appear at the top of the list, unless you sort by status.

You can also search for users by selecting the magnifying glass next to the Create User button. This is very helpful if you have a large number of users utilizing the product.

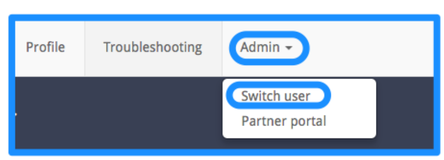
Sync users from the CRM



By selecting this icon, all users currently set up in your CRM will be integrated into the dashboard and available within the Users tab. The icon will vary based on the CRM you are connected to. *I.E. Synchronize users from SugarCRM, Synchronize users from Bullhorn, etc.* Once selected you should see a full list of all CRM users within the Users tab of your dashboard.



If the user already exists within the Tenfold dashboard, whether in the same organization or a different one, you will receive an error message when trying to sync them from your CRM. To avoid this, create the user with a "dummy" email address, update it in your CRM and resync.



Navigate to your partner portal, select the admin tab, and select Switch User. This will allow you to search for the users you received an error for and verify that they are enabled in another organization. From here, you can decide if they should be disabled in their current instance, or if you need to create a dummy email.

For example testuser@gmail.com is already set up in the dashboard, but I need to add them to a different organization. When syncing from the CRM I will receive the "Oops…" error. I now need to change testuser@gmail.com in my CRM to something similar to testuser+crm@gmail.com. Once this is completed, resync in your dashboard.

Keep in mind that email addresses with a special character other than the @ sign are case sensitive when logging in.

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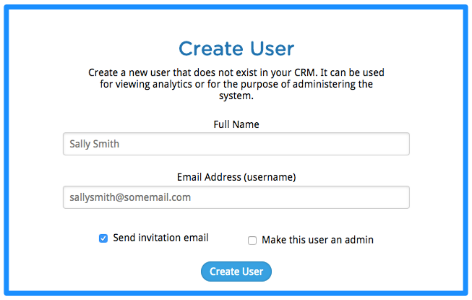
Create New Users

To create users who are not synced from the CRM, select the Create User button. This will prompt for the full name and username of the user to be created.

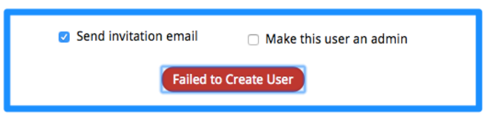


There is also a “make administrator” option and “send invite” option to make the user an administrator and send the invitation email upon creation.

Administrators will have full access to the dashboard, whereas most users will only see their profile and analytics. We recommend having 1-2 administrators per account so that no additional user is making any unnecessary changes to the configuration.

In some situations, you may not want to send the email invite upon creation of the user. I recommend sending after you have verified that the extensions are configured, or this could result in failed click to dial attempts. The email received will invite the user to download the chrome extension and create a password. If the chrome extension is downloaded prior to the phone extensions being assigned to the user, you will have to follow the steps to reset the chrome extensions.

If the user will be added to the CRM in the future, ensure that the same email address is used to automatically sync with the Tenfold dashboard once added to the CRM.



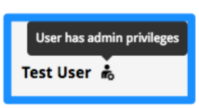
If the user already exists within the Tenfold dashboard, you will receive an error message when trying to create them again, whether it is under a different organization or not. To avoid this, create the user with a “dummy” email address.

For example: testuser@gmail.com is already set up in the dashboard, but I need to add them to a different organization. When creating the user, I will change the email address to something like testuser+dashboard@gmail.com. If you plan to add them to your CRM after the fact, ensure the email address matches.

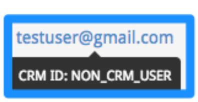
Keep in mind that email addresses with a special character other than the @ sign are case sensitive when logging in.

Review the Users

After syncing users from the CRM, there should be a list of users and usernames under the Users tab. The username will be the email address that the user has been set up within the CRM



The icon next to the name will identify if the user is an Administrator



Hover over the username to verify if the user is synced to the CRM. They are not connected to the CRM if there is no CRM ID.

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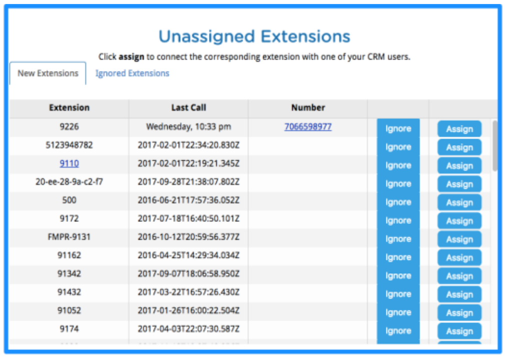
Assigning extensions

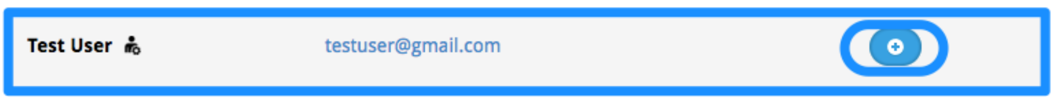
Once the phone system is connected, you will see an icon appear in the Users tab stating there are x extensions with x calls unassigned.



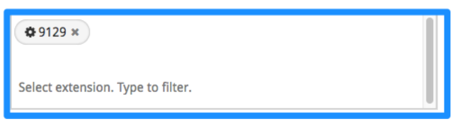
This will show all phone extensions that are active, or, those that have made an outbound or received an inbound call since your connection was established to the phone system. By clicking on this icon, you can assign the extensions to the various users imported from the CRM by finding their specific extension and clicking assign. If the users are not set up in the CRM, follow the create user set up prior to assigning the extensions.

You have the option to Ignore extensions if there are extensions that are not being utilized and will not be assigned to anyone, however it is preferred that they are left as is. The ignored extensions will be available in the Ignore Extensions tab in the event they need to be assigned in the future, but it is best practices to not ignore.

Click to Assign

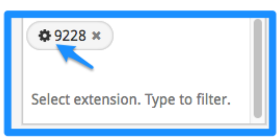


If preferred, there is an option to manually assign extensions by navigating to the plus sign next to each username. Click on the plus sign next to the username and begin typing the extension, a drop down of matching extensions should appear. Click on the correct extension and it will be assigned.



Notice that the plus sign disappears and the extension assigned is available. Add multiple extensions by searching and selecting the additional in the Select Extension section.

Extension Settings



Click on the extension associated to the user for more extension specific settings. Depending on the phone system utilized there may be additional credentials stsored within the extension data.

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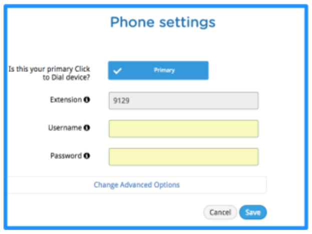
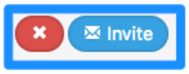


Here you will find the ability to set this extension as the primary line for click to dial enablement. Select the primary button which should change to blue from gray to signify that this is the primary click to dial extension. This is helpful if the user has multiple extensions assigned to them.

User Settings

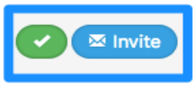
Enable Users



Once the extension is assigned to the user, enable the user to utilize Tenfold by selecting the Red X next to the name. This should toggle to a green check mark.

The green check mark indicates the user is enabled to use the product.

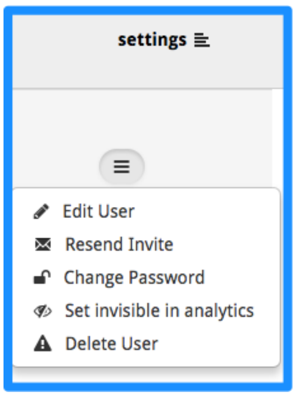
Send Email Invite



Next to the x or check mark is a "Send invite" button that will send an email to the user's email address and request they set up a password and download the chrome extension

Only send the email once all extensions are configured.

Additional Settings Dropdown



The three lines icon to the right of the username and extension holds additional options for managing the user including:

- Edit User- Here you can edit the name and username.
- Resend Invite- Resend the email that invites them to create a password, log in, and download the chrome extension.
- Change Password
- Set Admin
- Set Invisible in Analytics -This will remove the specific user from being visible on the analytics page and within reports generated from the dashboard.
- Delete User- We do not recommend this as you will lose any historical data within your analytics for this feature.

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Features

Your partnerships available features:

INCLUDED USER BUNDLES	CRM CONNECTOR*	CRM PRO CONNECTOR	CUSTOM CONNECTOR
Click to Dial on all Chrome pages	✓	✓	✓
Caller info pops on Inbound/Outbound Calls	✓	✓	✓
Activity History Shown in the Popup	✓	✓	✓
Automatic Call Logging to CRM	✓	✓	✓
Create New Records on No Match Found	✓	✓	✓
Add New Number to Existing Contact	✓	✓	✓
Easy Task Creation through Natural Language	✓	✓	✓
Send Call Wrap Up Emails Using @mention	✓	✓	✓
Call Analytics Dashboard	✓	✓	✓
Create New Opportunities, Cases and Tickets	✓	✓	✓
Relate Calls to Opportunities, Cases and Tickets	✓	✓	✓
Gamification of Call Activity		✓	✓
Email Template Integration		✓	✓
Set Call Dispositions		✓	✓
Assign Follow up Tasks to Team Members			✓
Match and Create on Custom CRM Modules *			✓
Custom Field Data in Popup *			✓
Ability to update Lead Status on Call			✓
Link to Call Recording in CRM Log *			✓
Enhanced Analytics/Gamification			✓
Leads Slipping Away Notification Emails *			✓
Lead SLA Reporting *			✓
Ability to Launch Online Video Meetings from Popup *			✓
Social Profile Integration *			✓
Track Lead Source by Phone Number Called *			✓

Indicates that a Tenfold representative must be included during the sales process and that Tenfold will need to be included during onboarding in order to enable the feature.

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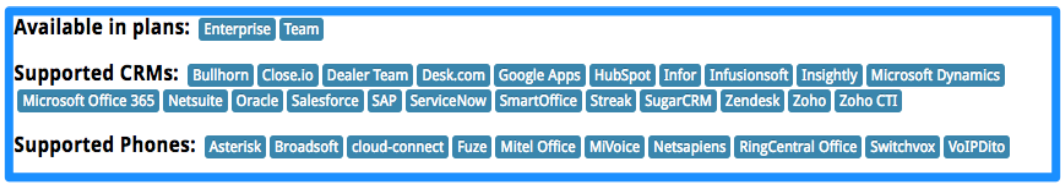
Setting up Features

The **Features** tab displays a list of features available. Depending on the licensing you have purchased, some or all of these features will appear. Review the features available to your customer and explain how to customize the applicable features.

Each feature will have its own instructions on the Features Tab. Follow the steps listed to ensure yours are properly enabled. To verify that your package features are active, look for the enabled or disabled toggle at the top right corner of each features page. When green and enabled, your feature should be active. If you feel you should have a feature enabled, but it is appearing as disabled, please reach out to your Tenfold contact to request the change. There are features utilized for custom workflow which can require specific configuration during onboarding.

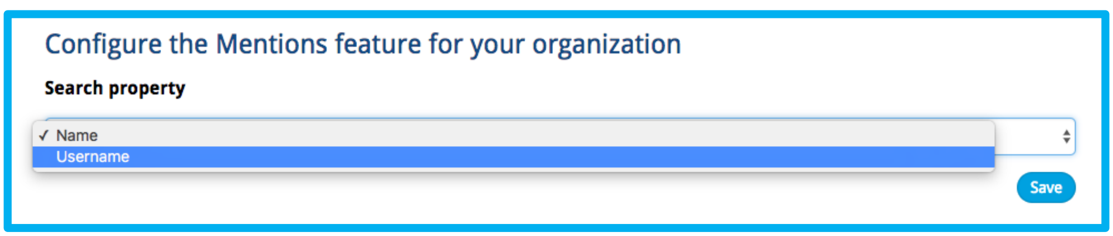
Each feature will also specify what phone systems and CRM’s it is currently available for. Verify that the feature applies to the integration and plan you are setting up before proceeding.



@MentionSyntax (Connector, Pro Connector, Custom Connector):

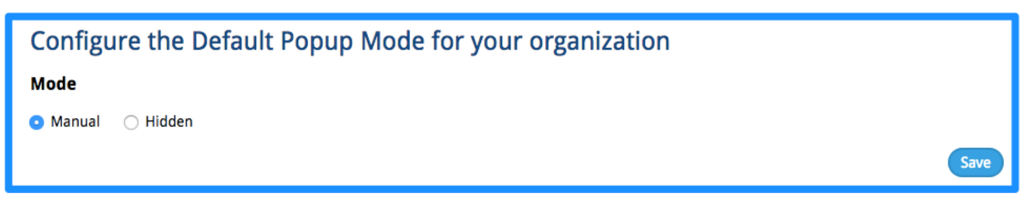
Use the @ sign to pull up a list of users from your CRM who can be sent a copy of the notes you enter in the call notes box. This feature helps you keep key players in the loop with just a quick @mention.

Configure the mentions features for your organization by choosing which search property you’d like to utilize: name or username (email address associated to CRM account).



Default Floating UI Mode (Connector, Pro Connector, Custom Connector):

This feature will help control when you see the UI popup on your screen. Change it to Hidden from Manual if you wish to not see the popup



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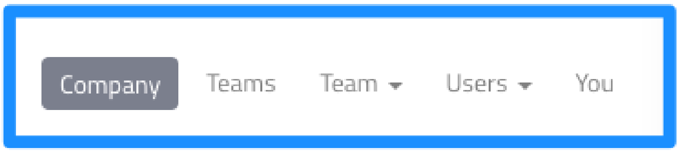
Analytics (Connector, Pro Connector, Custom Connector):

Tenfold provides an Advanced Call Analytics dashboard that provides real-time and historical data. There are multiple sections within this tab, including Leaderboard (Pro, Teams, Enterprise), Calls Graph, Schedule Call Reports (Teams, Enterprise), and User Table.



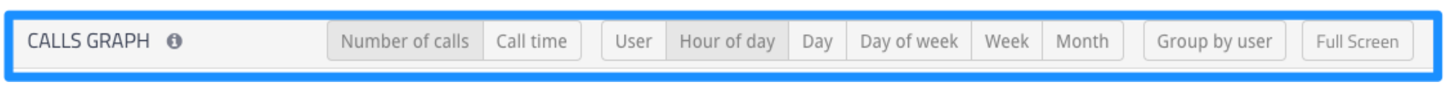
As an admin, you can switch between views by toggling by Teams (Premium only), Users, and yourself, located in the upper left.

You can also filter by date and time frame in the upper right-hand corner. You will also find the ability to export the report and change time zones on the reporting.

Leaderboard- see gamification feature enablement section

Calls Graph

This graph will show the following options, and will be controlled by the option that is selected from Company, Teams, Users, and You as is listed above.



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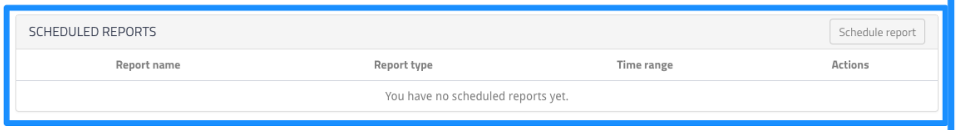
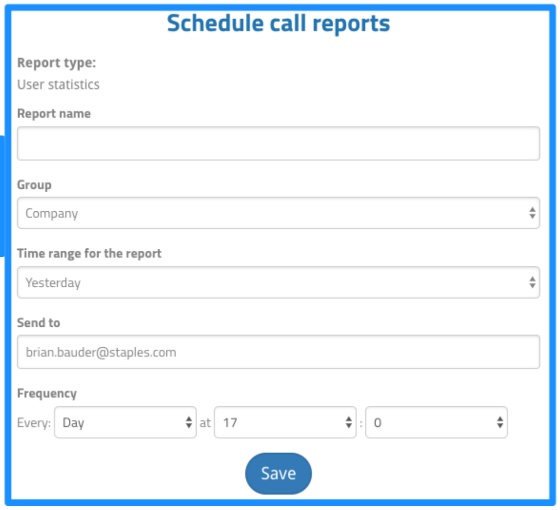
Schedule Call Reports using the schedule reports (Teams and Enterprise)

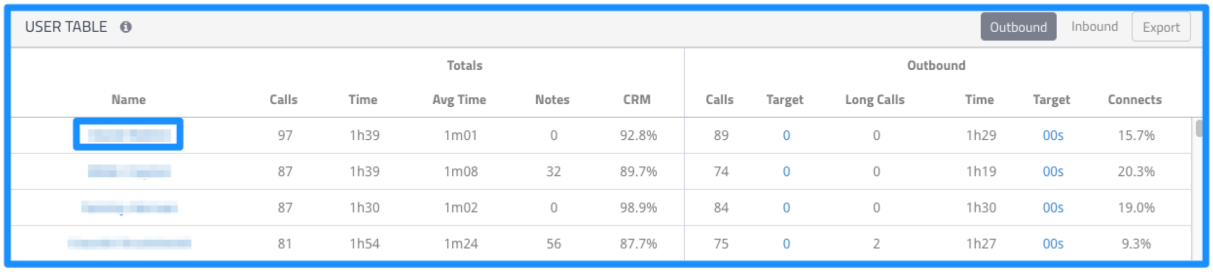




To schedule reports of your call analytics, scroll down to the Scheduled Reports section and select to Schedule Report. Fill in the requested information for when you prefer to receive the report. The report will be in. xcl format and is only sent to the administrator.

User Table

Navigate to the user table to view overall totals for all calls, inbound calls, and outbound calls per user.



	Totals					Outbound					
Name	Calls	Time	Avg Time	Notes	CRM	Calls	Target	Long Calls	Time	Target	Connects
	97	1h39	1m01	0	92.8%	89	0	0	1h29	00s	15.7%
	87	1h39	1m08	32	89.7%	74	0	0	1h19	00s	20.3%
	87	1h30	1m02	0	98.9%	84	0	0	1h30	00s	19.0%
	81	1h54	1m24	56	87.7%	75	0	2	1h27	00s	9.3%

At the top right-hand corner, you can select outbound or inbound, to review specifics for each call type, as well as export the report.

Hone in on specific calls for each user by searching the User Table and selecting the Name of the user for specific call statistics.

Under Totals, you will find the total number of calls made for that user, total time spent on the phone for the selected time frame, average time on each call, number of calls with notes saved, and percentage of matches to the CRM.

Under Outbound/Inbound, there will be specifics for total number of calls, target number (teams and enterprise only- set the target by clicking on the number), Long Calls (this is determined by the time preferences set in the Company Settings), Time spent on calls, target number for time (teams and enterprise only- set the target by clicking on the number), and percentage if calls considered a connection (established in the Company Setting tab).

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Natural Language Processor (Connector, Pro Connector, Custom Connector)

No additional set up needed when feature is enabled.

Create a follow-up task in the CRM when a follow-up phrase is detected in the notes box on "Save". The extension uses natural language processing to recognize phrases such as "follow up tomorrow" or "call back next week". You can assign the task to another Tenfold user by following your follow up command with the phrase: "Assign to @username". This supports both 12HR and 24HR formats

Reminder phrases Action phrases:

"Call"	"Task"	"Retry"
"Follow Up"	"Remind me to call"	"Try again"
"FU"	"Remind"	
"CB"	"Remind me"	

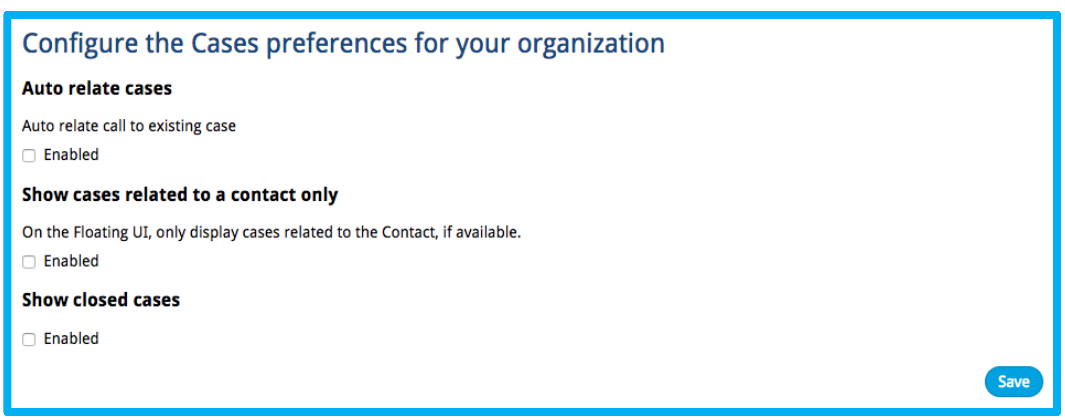
Examples "Remind me Tomorrow" "Remind me on Saturday." "Remind me in 1 week" "Remind me next month" "Remind me on Wednesday" "Call 01/29/2016" "Follow up 1/29/2014" "Follow up in two weeks" "Follow up in a week" "Follow up next week" "Call tomorrow " "FU tomorrow"

Cases (Connector, Pro Connector, Custom Connector):

The extension allows you to link your call notes to existing open cases (usually support cases) in your CRM. You can also create new cases—with a single click—that are automatically associated with the call and the CRM record you are connecting with. The Cases feature is currently available for these CRMs:

- Salesforce
- SugarCRM
- Microsoft Dynamics

Choose your case preferences for your organization to enable the Cases feature. This will allow various case types to appear in the UI so that the user can associate their call notes to case options the admin sets.



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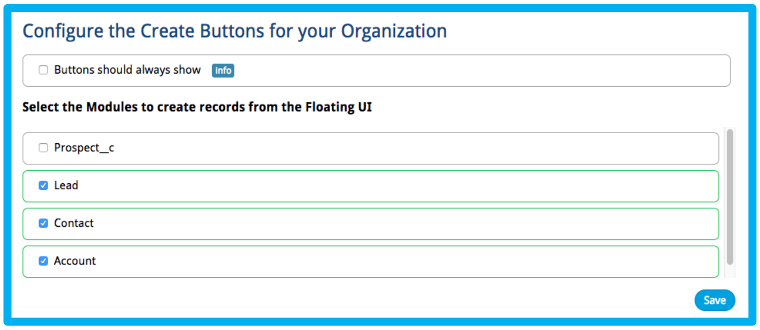
Check for Record Types on Relate Resource (Connector, Pro Connector, Custom Connector):

If this feature is enabled, we will verify if your module has different Record Types and decide which one is the best view to show you. If your module has more than one Record Type, we will open the CRM view that allows you to choose which Record Type you want to create.

Create Record Buttons (Connector, Pro Connector, Custom Connector):

By default, each CRM supports the creation of basic record types such as Contact, Account, Case, User, Lead, and so on. This feature allows you to customize the buttons available to users for creating custom records from the floating UI.



Select the Modules to create records from the floating UI. Note: your options will vary based on CRM configurations.

Custom Floating UI field (Custom Connector):*

Engage Tenfold for feature set up

Maximize the power of the Floating UI by making any CRM field of your choice viewable directly within the interface.

Custom Record Search (Custom Connector):*

Engage Tenfold for feature set up – a specific guide will be provided for easy setup

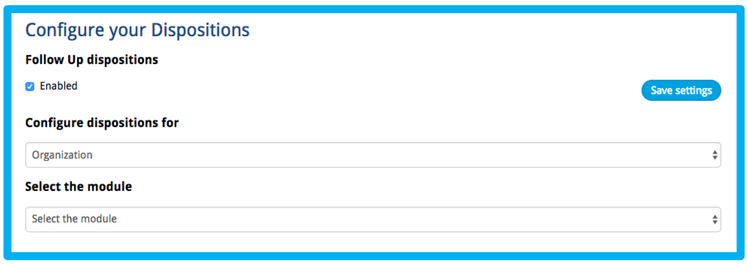
This feature allows for searching of custom modules in your CRM. Each integration will come with support for searching standard modules out of the box (such as Contacts, Accounts, Leads or Users). If you wish to have tenfold search and match other object (record) types in your CRM, this feature will help you do so!

Onboarding Customers on Tenfold

Dispositions (Pro Connector, Custom Connector):

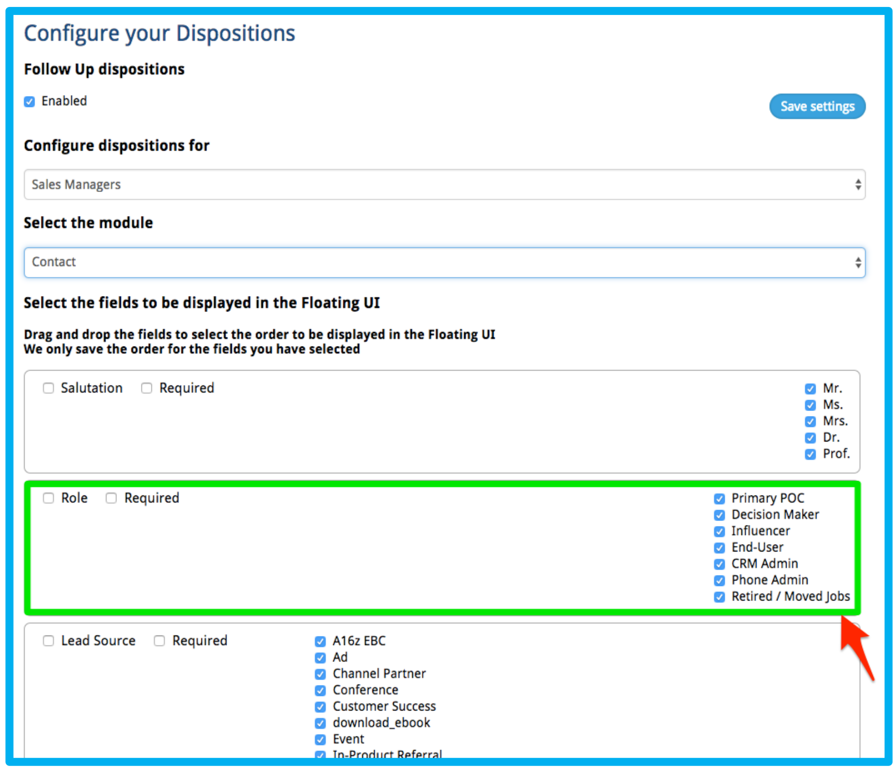
Select from pick-lists for CRM modules to appear on the Floating UI when you make and receive calls. This categorization is useful for creating better reports. The Dispositions feature is currently available for these CRMs:

Salesforce
SugarCRM
Microsoft Dynamics

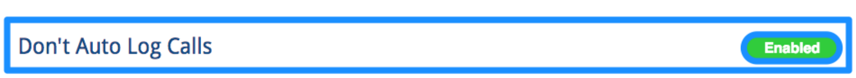


On the disposition page, you can configure your specific dispositions by choosing from the drop-down lists populated by what has already been set up in your CRM.

Once you have chosen the specific team, or entire organization + module, choose which fields will be displayed in the UI and which are required to populate in order to save the note. Drag and drop each section to choose which order the information will populate in the floating UI.



Don't Auto Log Calls (Connector, Pro Connector, Custom Connector):

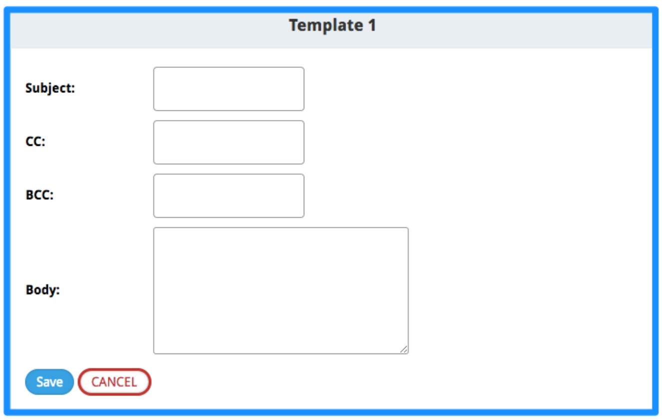


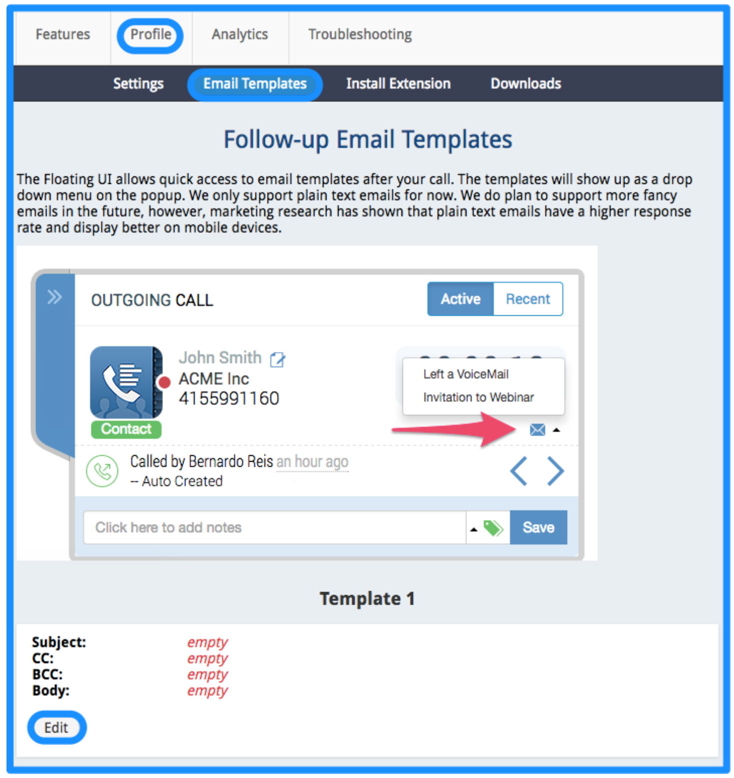
If you do not wish to have all calls auto logged to the CRM, navigate to the Don't Auto Log Calls feature. Here you will notice if the feature is enabled or disabled. If enabled, calls will NOT be automatically saved to the CRM. This should be disabled upon set up, but can be changed if specifically requested. To enable, click on the disabled button which should toggle to enabled and apply these changes. If you receive a notification that someone will contact you shortly, someone will be in touch to ensure you wish to proceed and ultimately enable.

Follow-Up Email Templates (Pro Connector, Custom Connector):

The Floating UI allows quick access to email templates after your call. The templates will show up as a drop-down menu on the popup. We only support plain text emails for now. We do plan to support higher quality emails in the future, however, marketing research has shown that plain text emails have a higher response rate and display better on mobile devices.

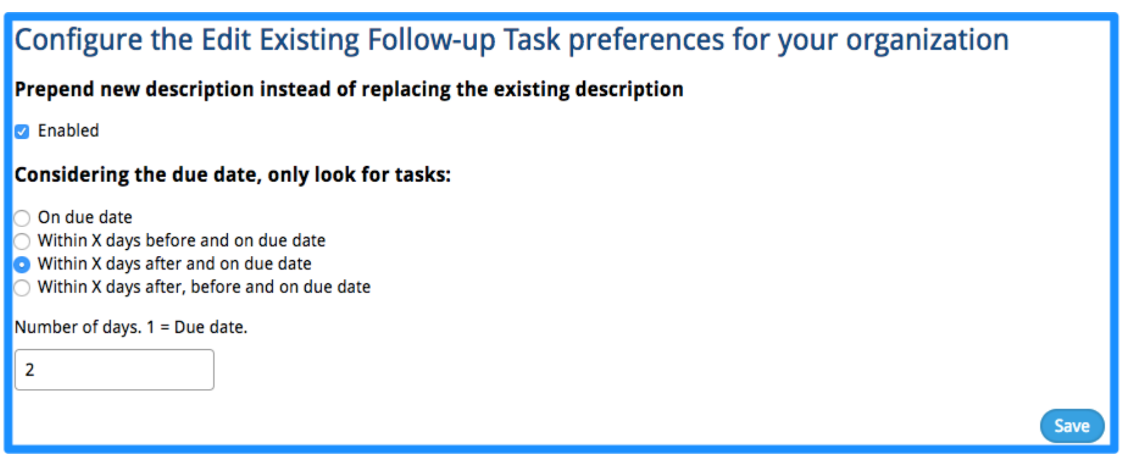
If enabled, navigate to the Profile tab and select the sub tab for Email Templates. Here you can add and edit multiple email templates in the below format.





Follow-up Task Edit

Close an existing follow-up task for a follow-up call. The number of days in the past or future to consider a follow-up task is configurable. Match follow-up tasks by either or by the user assigned to the call. Choose what preferences you prefer and hit save.



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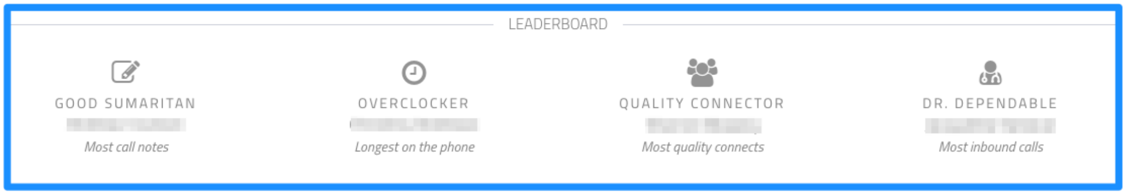
Gamification (Pro Connector, Custom Connector)

Gamification enables the natural competitiveness of sales people and shows you who the top performers are.

There is no set up to be applied, if enabled, the following icons will appear in the Analytics tab.



Good Samaritan is the user with the most call notes.
Over clocker identifies the user who has spent the most time on the phone.
Quality Connector will let the reader know who has the most quality connections, as established by your quality connection setting within the Company Settings Tab.
Dr. Dependable refers to the user with the most inbound calls.

Hide Analytics Page (Connector, Pro Connector, Custom Connector):

No additional set up needed when feature is enabled. (Supported CRMS: Autotask, Hubspot, Dynamics, Salesforce)

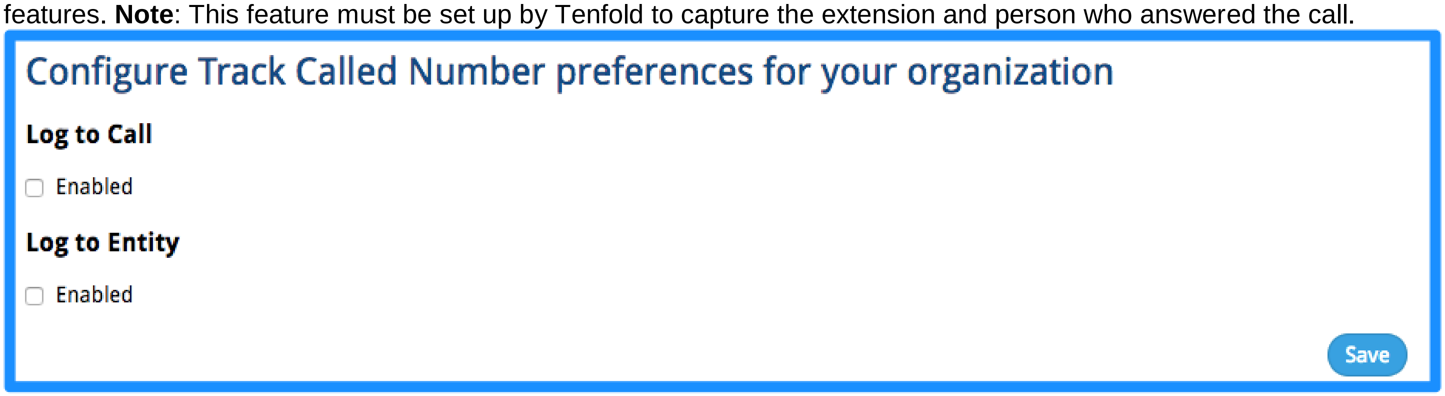
Enable this feature to prevent access to the analytics page. Once this has been enabled only an Admin will have the ability to adjust the settings as it will supersede the analytics visibility toggle under Company Settings. All tiers should have this automatically enabled, unless otherwise requested.

Inbound Number Tracking *(*Custom Connector*)*:*

Engage Tenfold for feature set up

Make better marketing decisions by measuring which phone numbers and lead sources provide the highest return on investment. This feature allows you to log the number dialed when you create a new CRM record so you can have better tracking on the lead source or phone number placement that got them to you in the first place. **Note**: This feature must be set up by Mitel CRM Integrations support to capture the extension and person who answered the call.

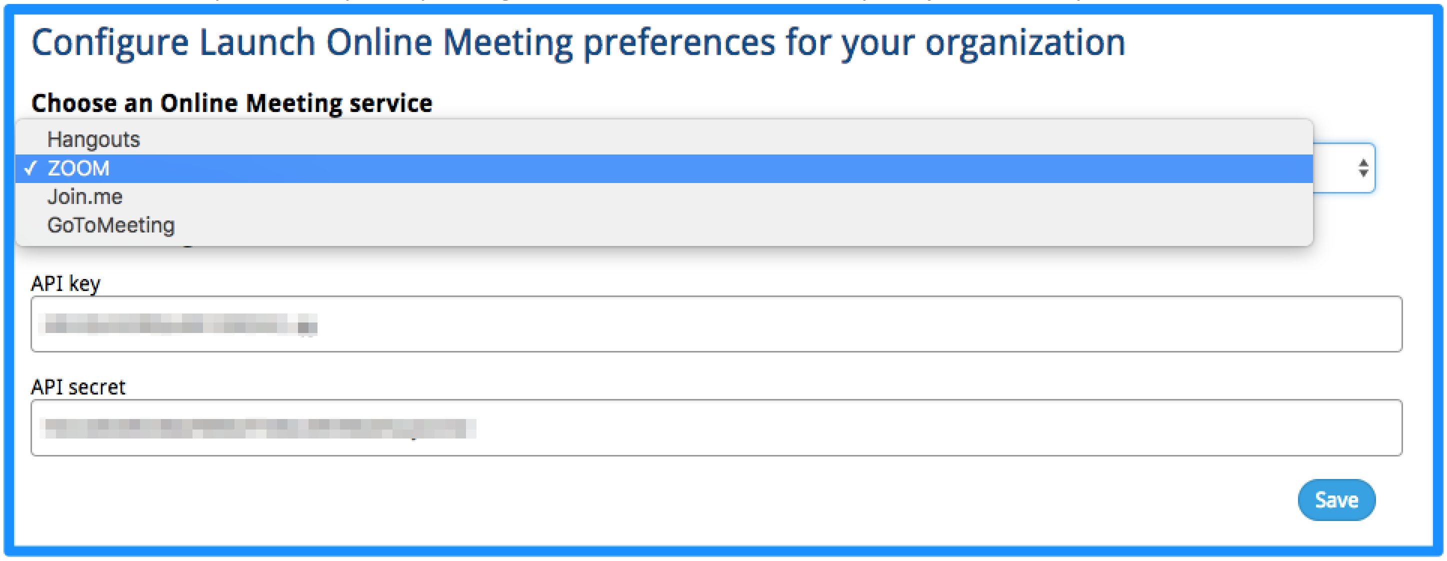
Choose which options you would like to track inbound number information under the Inbound Number Tracking tab in features. **Note**: This feature must be set up by Tenfold to capture the extension and person who answered the call.



Launch an Online Meeting (Custom Connector)*:

Engage Tenfold for feature set up

Tenfold integrates with a handful of video conferencing and screen-share solutions to provide this functionality. A user simply clicks on the video icon in the Tenfold UI and clicks go if the email is correct. Their screen-share application launches and the person they are speaking to receives an email that they can join from any device.



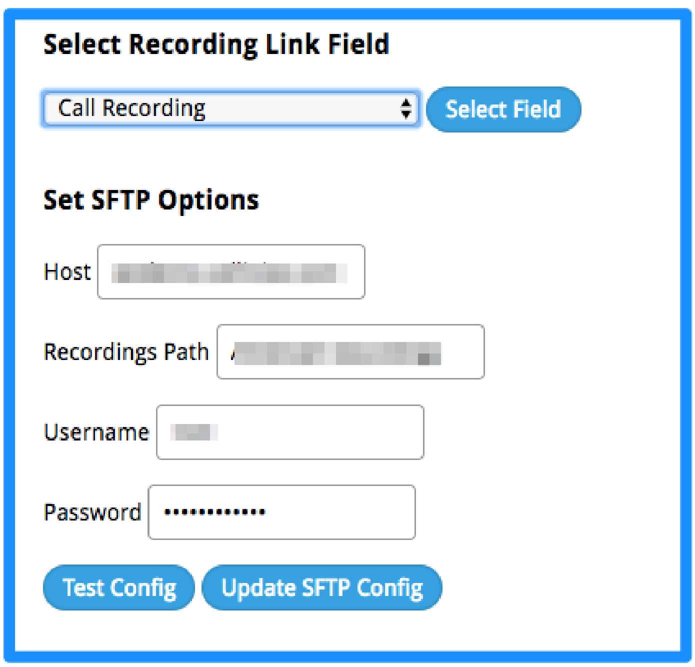
Log Call Recordings (Custom Connector)*:

Engage Tenfold for feature set up

This feature allows for call recordings to be saved to a specified field in your CRM and easily accessed for future review. You must have call recording enabled by your phone provider prior to enabling this feature.

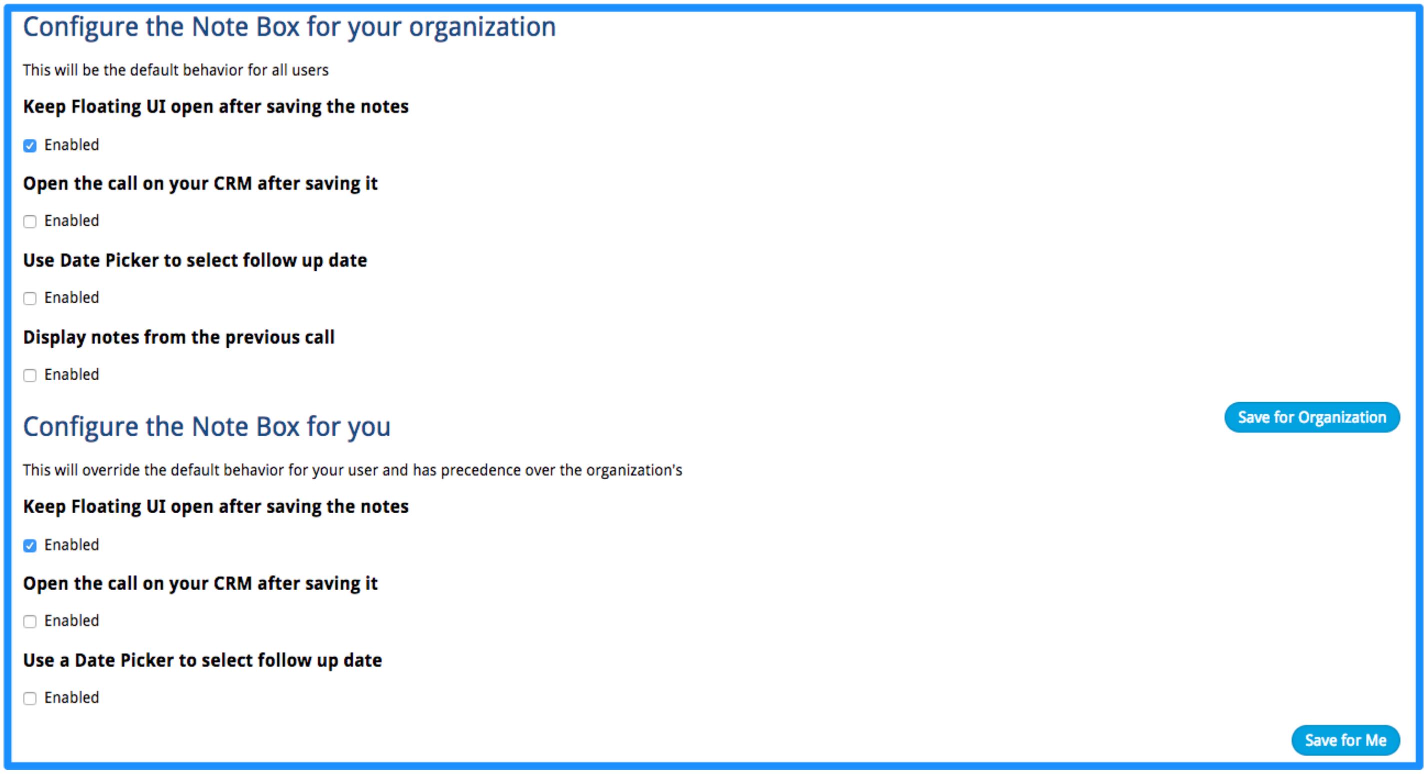
Enable and set up this feature by specifying the field that the recording will be posted to in your CRM in the Select Field drop down. As well, enter the specific SFTP credentials where your call recordings are stored, including Host and Username and Password. The Recordings Path will identify where within the STFP the call recordings are being stored.

You can confirm the SFTP functionality with the 'Test Config" button, which should respond with a positive reaction.



Notes Set up (Connector, Pro Connector, Custom Connector):

This feature allows you to customize the behavior of the Floating UI for yourself and your organization. Review the various options and ensure you hit save for each. There is a 'Save for Me' and 'Save for Organization' so that an Admin can specify unique behavior for individual profiles.



Opportunities (Connector, Pro Connector, Custom Connector):

Support for searching Opportunities modules in your CRM for phone numbers on inbound or outbound calls. Ability to create a new Opportunity record from the popup and to see a list of associated Opportunity records in the Floating UI. The Opportunities feature is currently available for these CRMs:

- Salesforce
- SugarCRM
- Microsoft Dynamics

In the features tab, choose to enable the feature that will auto relate calls to existing opportunities. This will allow all calls logged to be associated to the opportunity as well as the account within your CRM.

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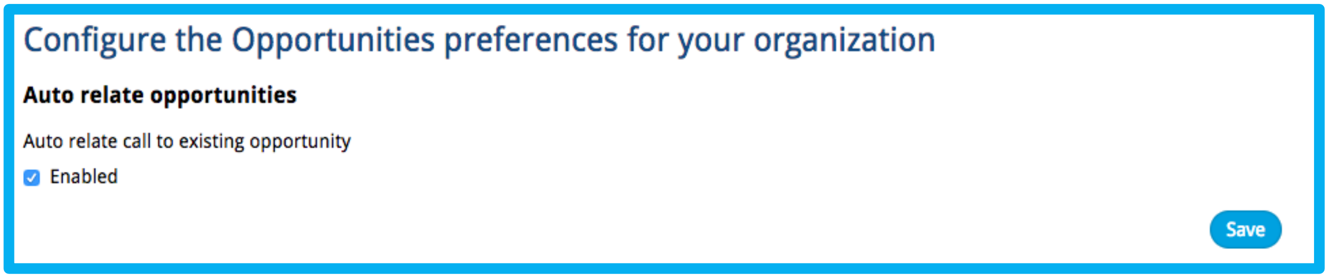

Social Media Lookup (Custom Connector)*:

Engage Tenfold for feature set up

Get a Social Media Lookup of the current record using the email provided by the CRM. You will be able to see the contacts LinkedIn, Facebook, Google+ and much more. Your Floating UI will show the image of the various platforms that our records can find related to the email so you are aware of what

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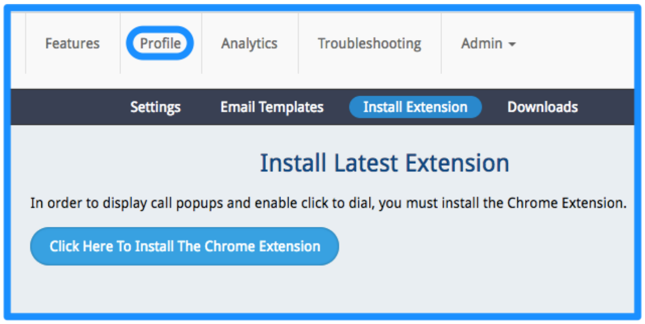
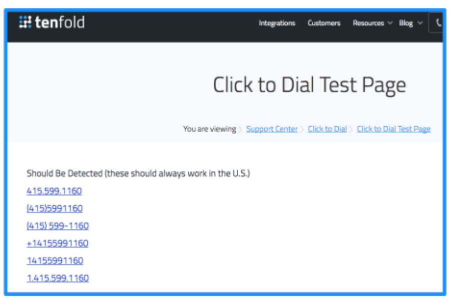
Download chrome extension



Navigate to the Profile tab and select the Install Extension option in the navy bar. You will see an option to “Click her To Install the Chrome Extension.” This will either display a popup verifying you wish to download the extension, or it will navigate you to the Chrome store where you will find the ability to download the extension.

If you, or an employee, download the Chrome extension prior to the phone extension being connected, it will result in an error. To troubleshoot this, navigate to the Chrome settings>More Tools>Extensions and disenable the extension. Enable again and the issue should resolve.

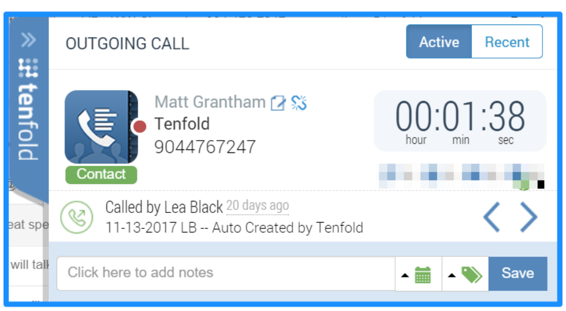
Test Click to Dial Functionality



Go to https://www.tenfold.com/support-center/click-to-dial-test-page/ to verify that the phone numbers are hyperlinking. You can also check by adding a test account in the CRM.

Ensure you are testing with a user who is logged in to Tenfold and has their extension correctly associated.

Click on the hyperlinked phone number and the users phone line will ring. They must answer the call for the click to dial call to complete. Verify that the UI pops up and behaves as expected by saving notes to the CRM or creating a new record.



Go through each feature enabled in their UI as they are in the CRM to best understand the full picture.