



# Tenfold Desktop App for SugarCRM

## User Guide

Tenfold SugarCRM Desktop User Guide  
Version 1.1



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# Table of Contents

- 1. Introduction.....3
- 2. Login.....4
- 3. Tenfold UI Options.....7
- 4. Tenfold UI Basics.....9
- 5. Placing Calls.....12
- 6. Incoming Calls.....14
- 7. Managing Calls with Tenfold.....18
- 8. Call Logging.....22
- 9. Tenfold Analytics.....25
- 10. Troubleshooting.....27

## 1.1 About Tenfold Desktop App for SugarCRM

Tenfold Desktop App for SugarCRM provides seamless integration between SugarCRM and your telephony and contact center solutions to help drive productivity, improve customer experience, increase data quality and maximize value realization in these platforms. Tenfold Desktop App for SugarCRM provides the following capabilities:

- ❑ Click-to-dial from any phone number in Chrome
- ❑ Screen-pop with customer info based on ANI
- ❑ One-click to SugarCRM record from the Tenfold UI
- ❑ Automatically Log inbound and outbound calls
- ❑ Easily capture notes, call dispositions and next steps
- ❑ Relate calls to standard/custom SugarCRM objects
- ❑ Click-to-Create standard/custom SugarCRM objects
- ❑ Call data available in SugarCRM for reporting
- ❑ And much, much more...

## 1.2 Intended Audience

This Guide is intended for End Users from companies leveraging the Tenfold Desktop solution for SugarCRM and stakeholders interested in the capabilities and experience provided by the Tenfold Desktop solution. This is meant to be a general Guide and may not include information about organization-specific customizations or features released and improved since the latest update of this guide. This guide is not intended for system/network administrators and does not provide any information on how to set up the application on user desktops or how to configure the SugarCRM instance to be able to use this application. This user guide will show you how to use this application, and provide known issues/limitations of the application as well as some basic troubleshooting questions and answers. If you are unable to find the needed information in this guide, contact your tenfold customer success manager or our support team by reaching out to [support@tenfold.com](mailto:support@tenfold.com).

## 2.1 Creating Your Tenfold Account

Once your Admin has invited you to use Tenfold, you will receive an email. By clicking in the link in your email invitation, you will be prompted to create a Tenfold password. Depending on your organization's application deployment process, you may already have the desktop application or you may need to download it.

The image shows two overlapping screenshots from an email invitation. The top screenshot is titled "Callinize Primary has invited you." and lists three bullet points: "Your calls are automatically logged for you.", "You'll always know who's calling.", and "You can click to dial any number on any website." Below the list is a button labeled "Install" with a blue arrow and the number "1" pointing to it. The bottom screenshot is titled "Welcome" and shows a form for creating a password. It includes a text input field for the email address (pre-filled with "@tenfold.com"), a "Password:" field, and a "Confirm:" field. A "SET PASSWORD" button is at the bottom, with a blue arrow and the number "3" pointing to it. A blue arrow and the number "2" point to the password input fields.

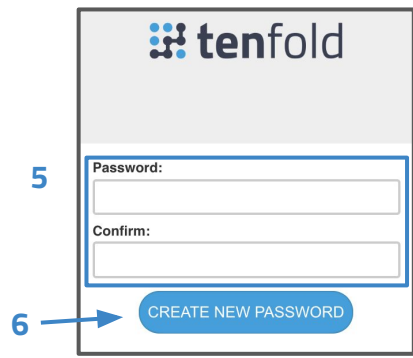
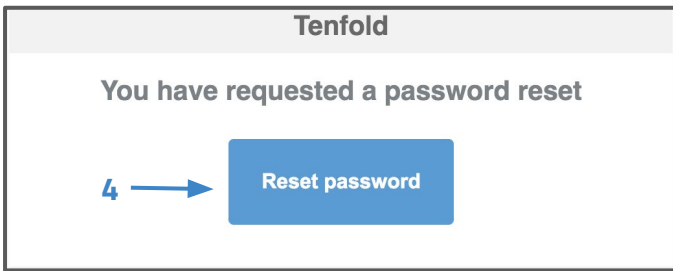
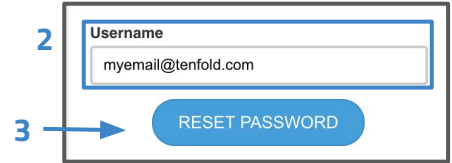
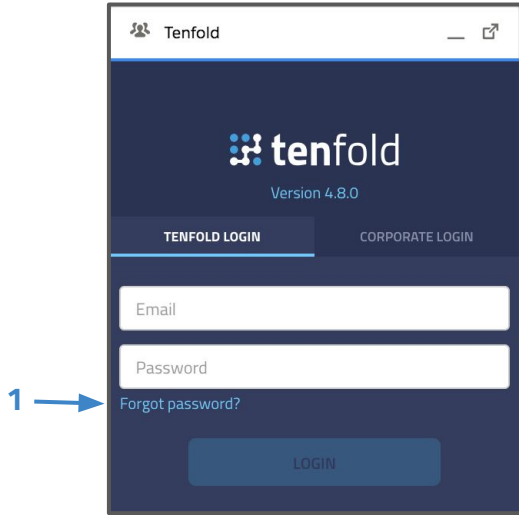
## 2.2 Logging in to Tenfold

Logging into the Dashboard will keep you logged into the Tenfold Desktop application. If you find that you are no longer logged in, you can either log into the [Tenfold dashboard](#) or log into Tenfold Desktop application directly.

The image shows a screenshot of the Tenfold login interface. At the top, it says "Tenfold" and "Version 4.8.0". There are two tabs: "TENFOLD LOGIN" (selected) and "CORPORATE LOGIN". Below the tabs are two input fields: the first contains "myemail@tenfold.com" and the second contains "\*\*\*\*\*". A "Forgot password?" link is below the password field. At the bottom is a blue "LOGIN" button. A blue arrow and the number "1" point to the email input field, and a blue arrow and the number "2" point to the "LOGIN" button.

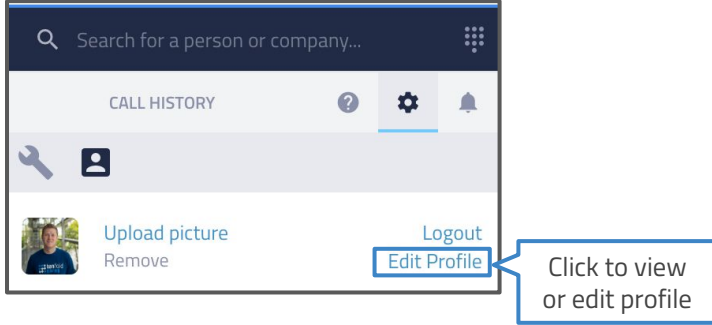
## 2.3 Reset your Password

In the event you forget your password, resetting is easy from the [Tenfold dashboard](#) or from the Tenfold Desktop App. Simply click "Forgot Password" and wait for the password reset email. Once received, click "Reset Password" and enter a new password on the next screen to confirm the reset.

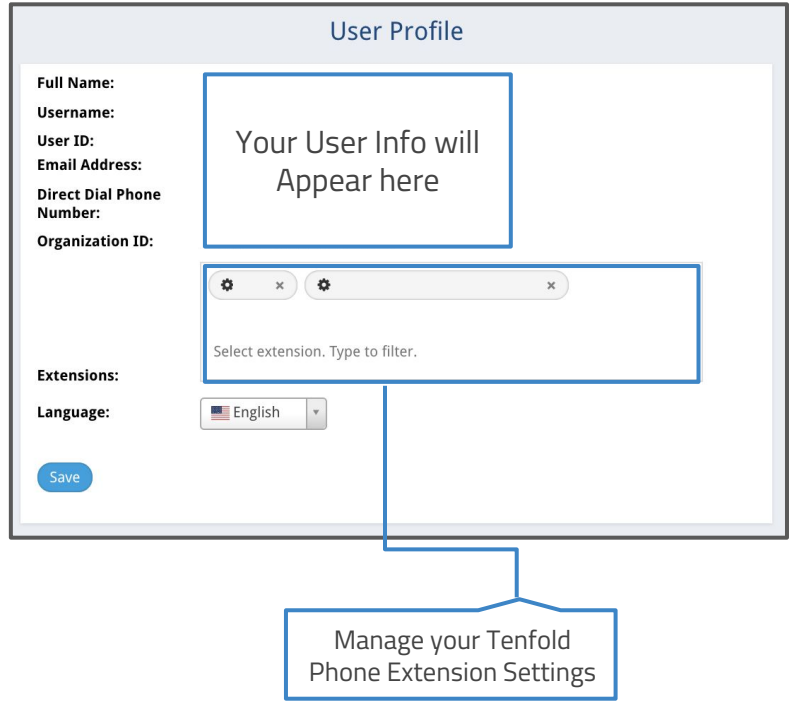


## 2.4 Managing your Tenfold Profile

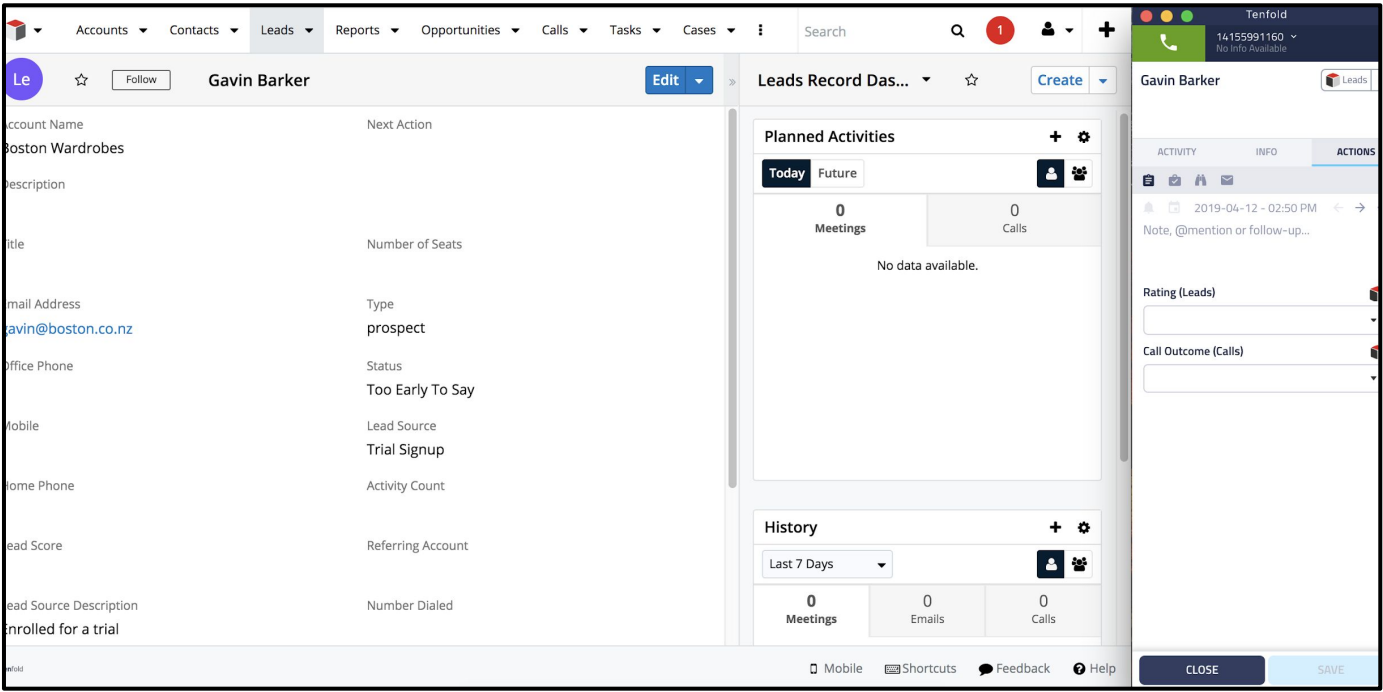
You can access your Tenfold Profile by navigating to the Profile tab of the dashboard. You may want to save the [Profile page](#) as a bookmark in your browser. You can also get here from the settings page of the app by clicking "Edit Profile."



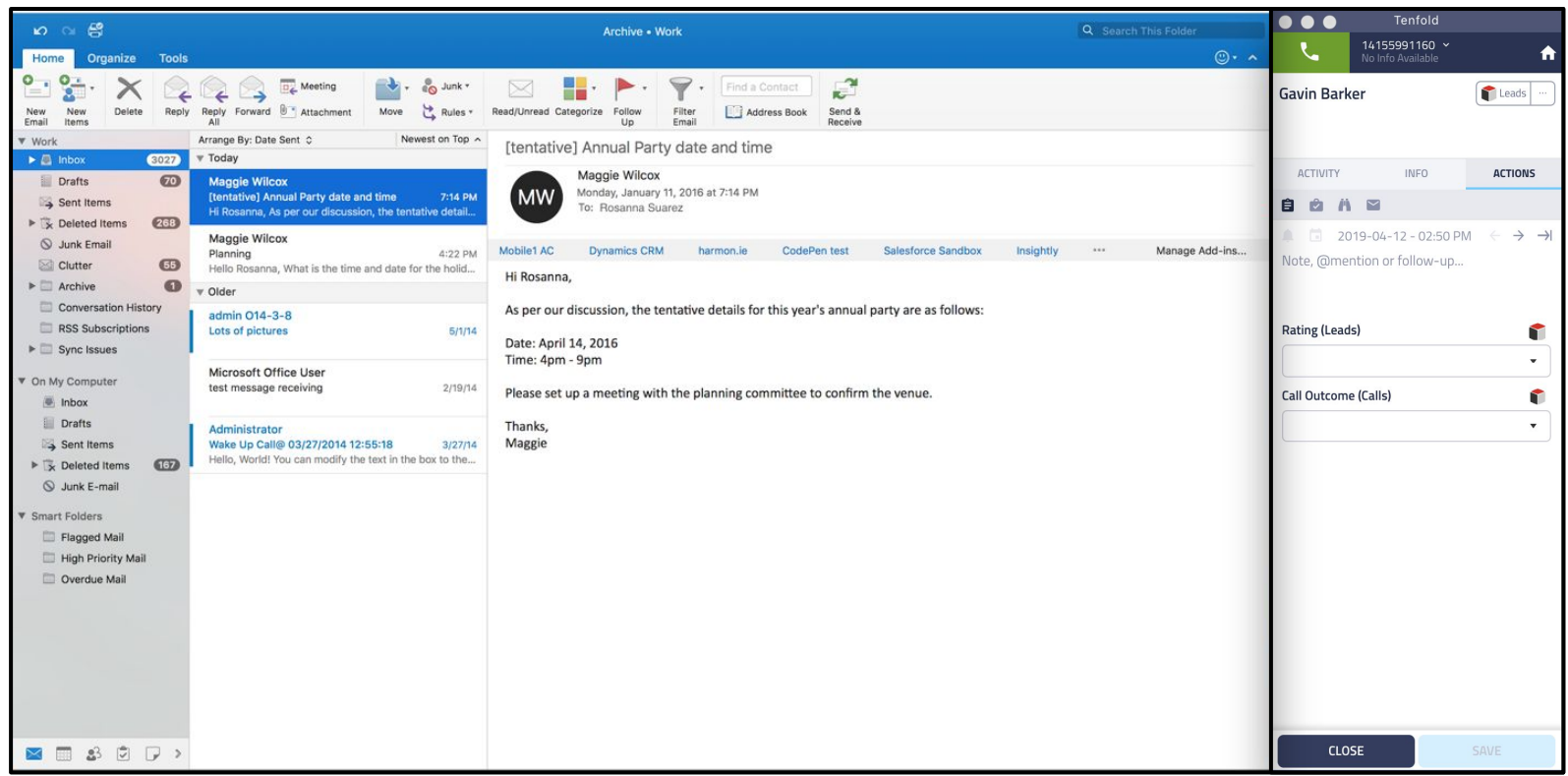
From your Tenfold Profile Page, you will be able to access key information about your Tenfold account, manage your Tenfold extension(s), Update your language profile and make changes to your email template settings.



**3.1 Tenfold Desktop App for SugarCRM** - Tenfold's Desktop App UI for SugarCRM lives as a separate app from your browser or from the SugarCRM window. This allows you to interact with SugarCRM while in any screen or leveraging any application. It also allows you to move the application around your screen, minimize when you aren't using it or set it to always be on top.



This allows you to have access to see, interact with and update SugarCRM, even when your in applications like Outlook:





### 4.1 Home Page & App Settings

Home Page

CALL HISTORY		
Mr. QA Test Bruno	Contacts	00:18
new_Contact	Contacts	00:10
Steve Smith	Contacts	00:01
Test_CTD	Contacts	00:02
Jerry Rice	Contacts	00:00
Johnny Appleseed	Contacts	00:03
Nathan Cook	Contacts	00:02

Update Your Primary Extension (Click to Dial Extension)

Call History Displays Your Last 20 Calls - Click the SugarCRM Icon to access the record or the name to access the call in Tenfold

#### Settings > Profile

Settings > Profile

Search for a person or company...

CALL HISTORY

Upload picture Remove    Logout Edit Profile

Primary Extension: 1174

User ID

Org ID

Full Name

Username

Email Address

Direct Dial

Your User Info will Appear here

#### Settings > General

Settings > General

Search for a person or company...

CALL HISTORY

LANGUAGE, DATE & TIME

Language: English US

Timezone: (GMT-05:00) Chicago

Time Format: 12-hour time

Date Format: Apr 2, 2019

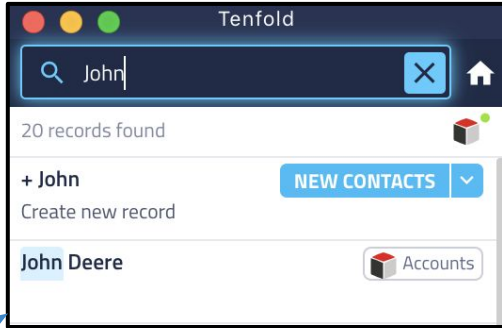
Manage Language & Time/Date Settings

## 4.2 Search for Records or Create New Record

1) Click on the text entry search bar

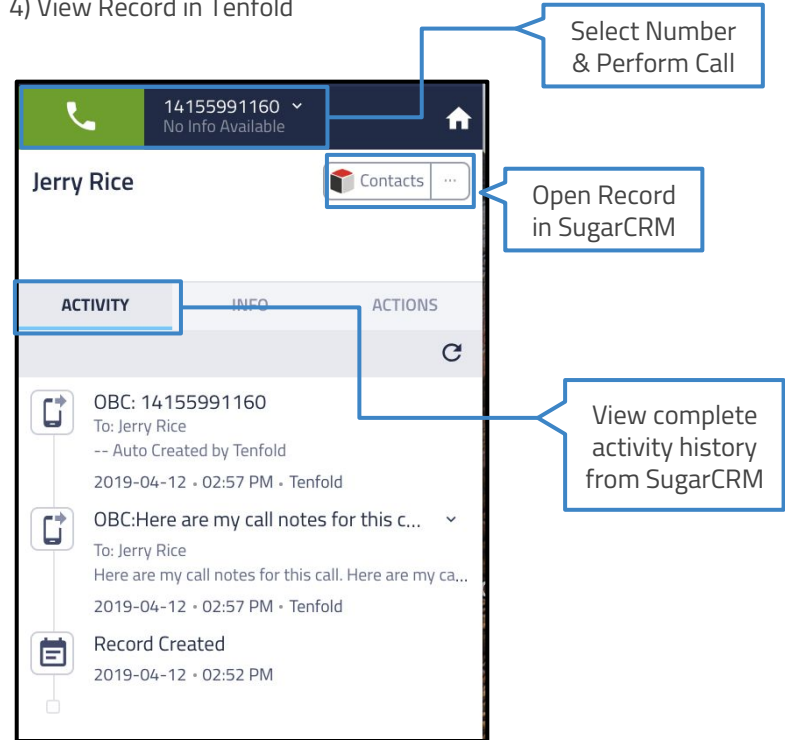


2) Enter the name of a person or company

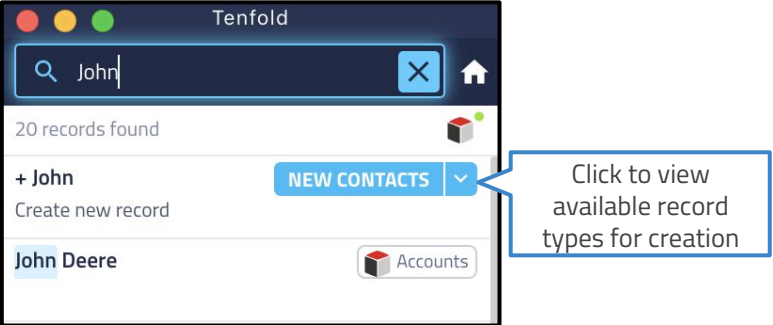


3) Click on the record to view in Tenfold

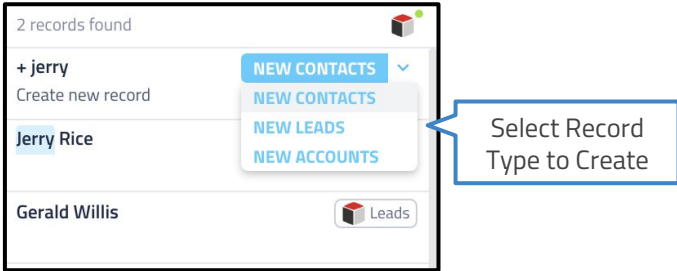
4) View Record in Tenfold



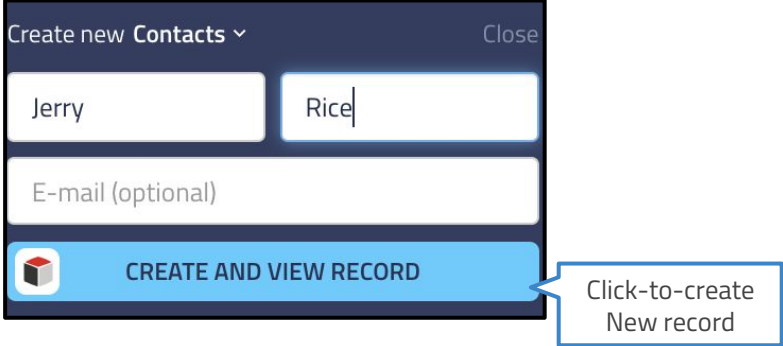
5) Click on new record button to create new record



6) Choose the type of Record you would like to create



7) Optionally enter E-mail and Click "Create and View Record"



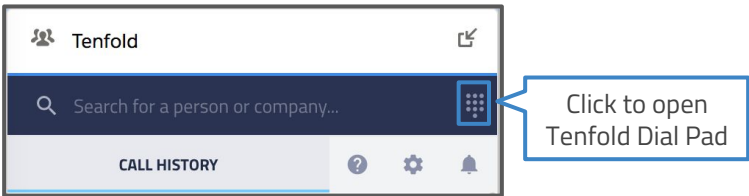
8) Record will be automatically created and displayed in Tenfold



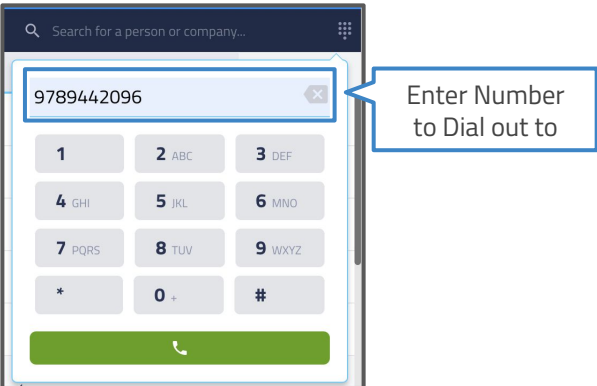
\*\*Note that record creation may be disabled by your admin

## 5.1 Placing Calls with Tenfold Dial Pad

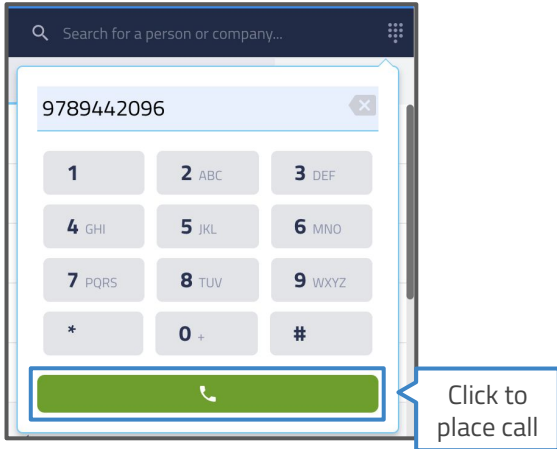
1) From the home page, click on the dialpad icon



2) Type in the number or enter using the key pad



3) Click the green dial icon or press enter to initiate a call

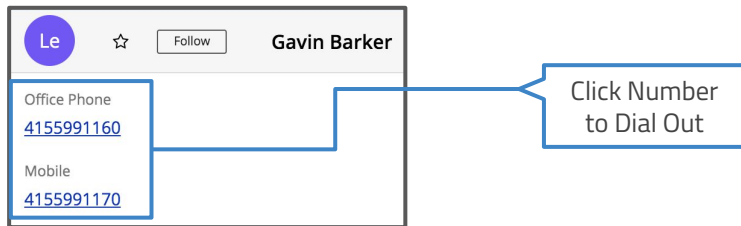


4) Call will initiate and Tenfold will show a success message

## 5.2 Placing Calls with Click to Dial

Using the CTD chrome extension, Tenfold will turn all phone numbers on any Chrome web page into hyperlinked numbers that can be clicked on to dial out automatically.

Click to dial works in detailed record views:



Click to dial also works in SugarCRM list views:

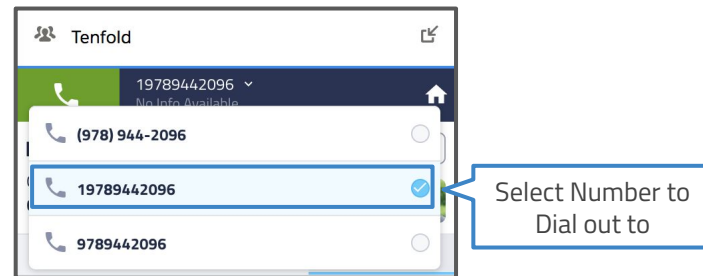


A link to download the CTD chrome extension can be found in the Settings > General Settings tab on the Desktop App.

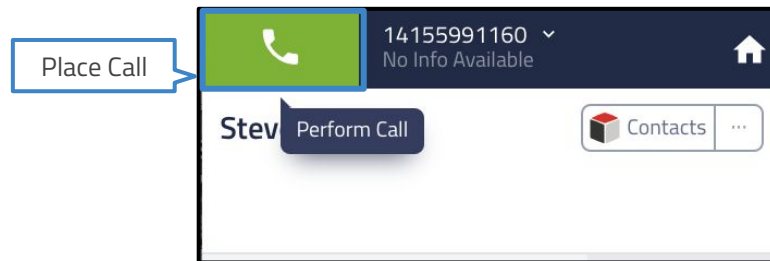
## 5.3 Placing Calls from a record view in Tenfold

Users can also place calls directly from a record view in Tenfold after searching for a record or pulling a record up from history.

1) Select the phone number to dial out to



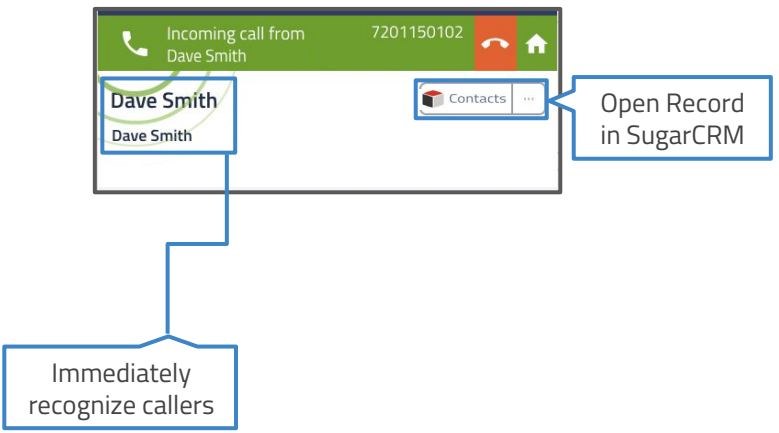
2) Click on the green phone icon to initiate a call



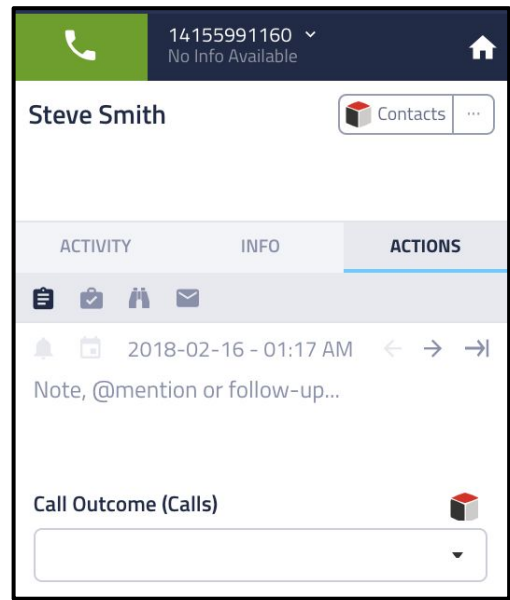
## 6.1 Incoming Calls with Tenfold

Tenfold will automatically capture inbound calls in SugarCRM whether or not a user interacts with the Tenfold UI on a call.

1) On incoming calls, Tenfold will pop up with customer info

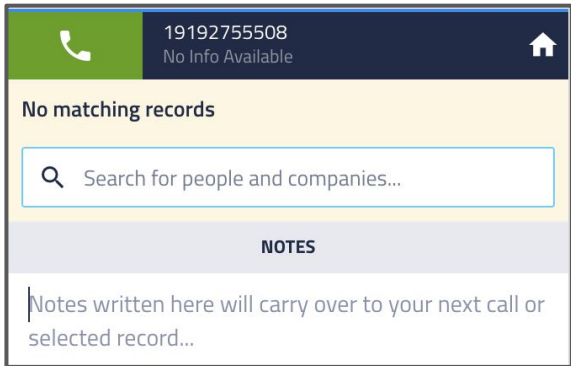


2) By default, Tenfold will show the "Actions" tab:

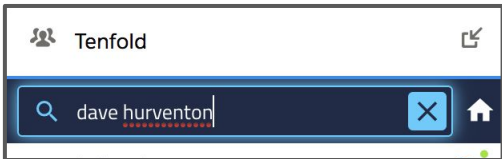


## 6.2 No Match Found View

Sometimes people may call in from a number that does not exist in CRM, leading to no matches being found by Tenfold. In these cases, Tenfold will display the No Match Found View:



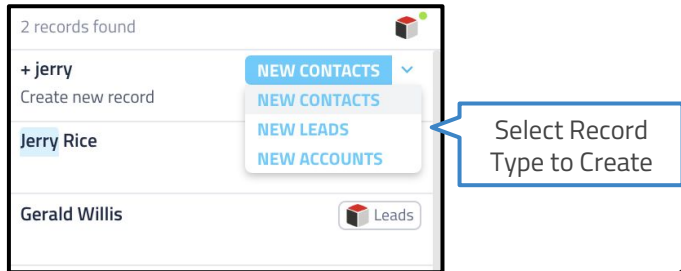
1) You can start typing notes that will be carried over once a record has been selected. To select a record, begin typing in a name:



2) And select a record from the drop-down if it exists



3) Or click-to-create a new record from the Tenfold UI



### 6.3 Multiple Match View

Sometimes people may call in from a number that exists across more than 1 record in the CRM, leading to multiple matches being found by Tenfold. This can happen due to duplicate records, shared phone numbers or corporate dialout rules. In these cases, Tenfold will display the Multi Match View:

30 matching records

Search for people and companies...

MATCHING RECORDS    NOTES

AccountTest    Accounts

Callinize Test Account    Accounts

James Fitch    Accounts

Search for other records in SugarCRM to assign call to

Click to view Record in SugarCRM

Click to select a record from the list

2) After clicking a record in the list, you will be presented with a few additional options. Click "Assign Call" if you would like to associate the call with this record.

← Back to Search results

ASSIGN CALL AND SAVE NUMBER

ASSIGN CALL ONLY

VIEW RECORD

Assign Call Only - don't save number

Assign Call to Selected Record and add number

3) If you selected the wrong record or need further verification, you can either click "View Record" to open the record in SugarCRM or "Back to Matching Records" to return to the list.

← Back to Search results

ASSIGN CALL AND SAVE NUMBER

ASSIGN CALL ONLY

VIEW RECORD

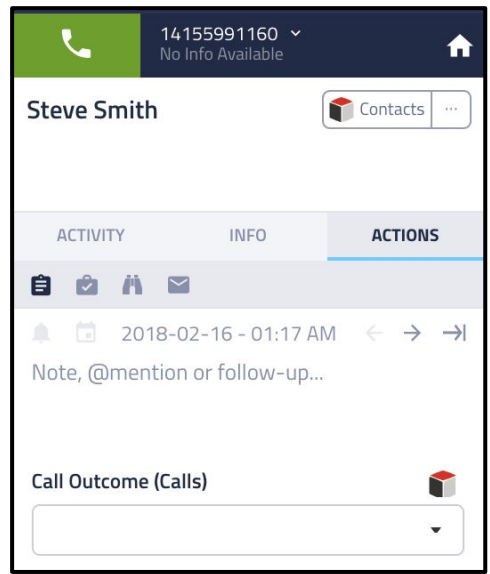
Return to multi-match list view

Click to view Record in SugarCRM



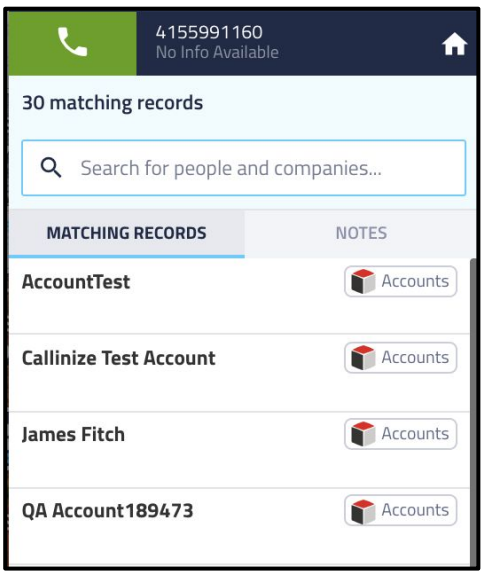
## 6.4 Recap of Call Scenarios in Tenfold - Tenfold's UI solves for the 3 main scenarios for inbound/outbound calls:

Single Match



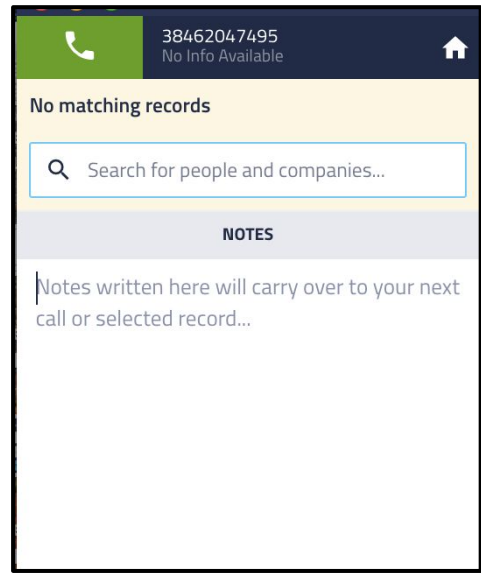
Presented when only one match is found or user resolves down to one record in no match or multi-match

Multiple Match



Presented when multiple matches are found allowing user to select, search for and relate or create new record.

No Match

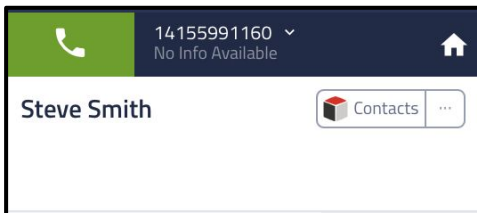


Presented when no match is found allowing user to search for and relate or create a new record

## 7.1 Tenfold Active Call UI Overview

Once on an active call with Tenfold, there's a lot of value Tenfold can provide to help retrieve, update and capture information. The UI is broken up into 2 primary sections:

### 1) Active Call Display



### 2) Workflow Tabs



## 7.2 Active Call Display

The Active Call Display provides a heads-up view of key info needed to recognize and serve a contact. Depending on configuration, additional information may be provided. The Active Call Display is always visible on a single match call ensuring you always have key context at your fingertips.

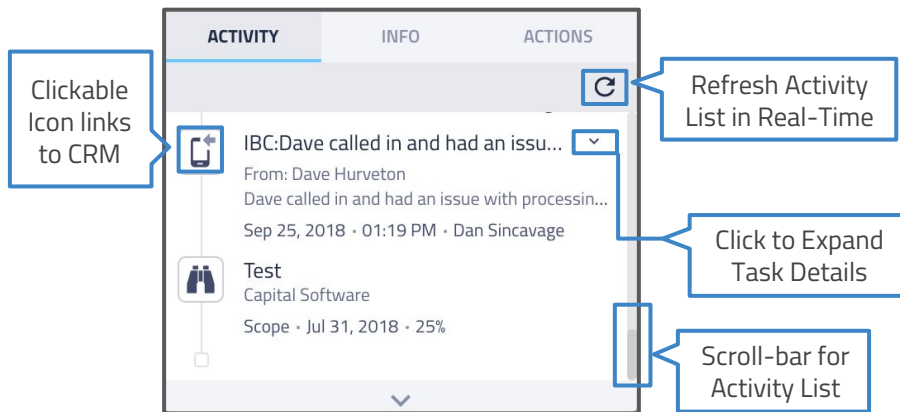
By default, the Active Call Display includes the record name, a link to the record, the parent record (i.e. Account), a link to the parent record, the status of the call, the duration of the call and the phone number of the matched record.

Some plans may include additional information, such as an image from matched social profiles, job-title from LinkedIn, Location, Line-type, Carrier and other 3rd party data that helps you have context about a caller and better service their needs.

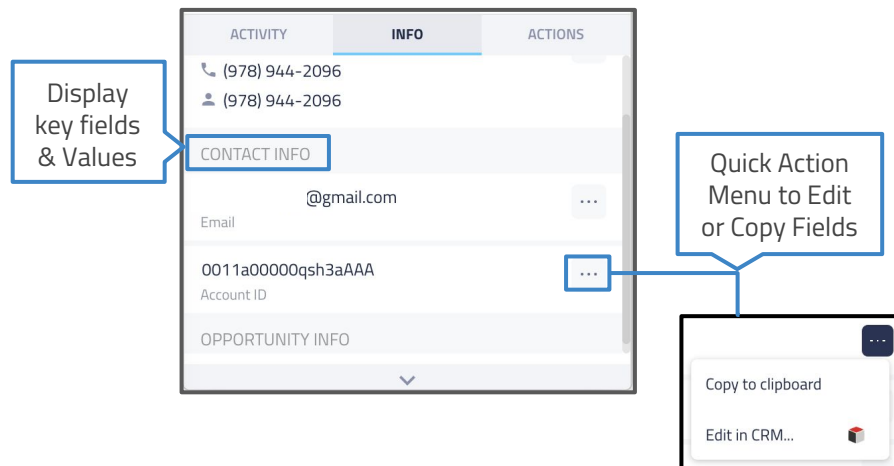
## 7.3 Workflow Tabs

Tenfold’s UI consists of 3 distinct workflow tabs. These tabs are the “Activity” tab, the “Info” tab and the “Actions” tab.

**Activity tab:** The Activity tab provides context of the matched record. By default, it displays open activities and completed activities saved in the CRM in chronological order. The Activity tab will also include key events, such as “record created,” “Case opened,” and more. Each activity and event has an icon next to it that allows you to access the CRM record with one click.



**Info tab:** The Info tab is a detailed view of key information related to the matched record and other related objects. The information that is displayed on the Info tab is customized based on your Tenfold team and the type of record (i.e. lead, account, contact) and related objects (i.e. account, case, opportunity) that you are interacting with.



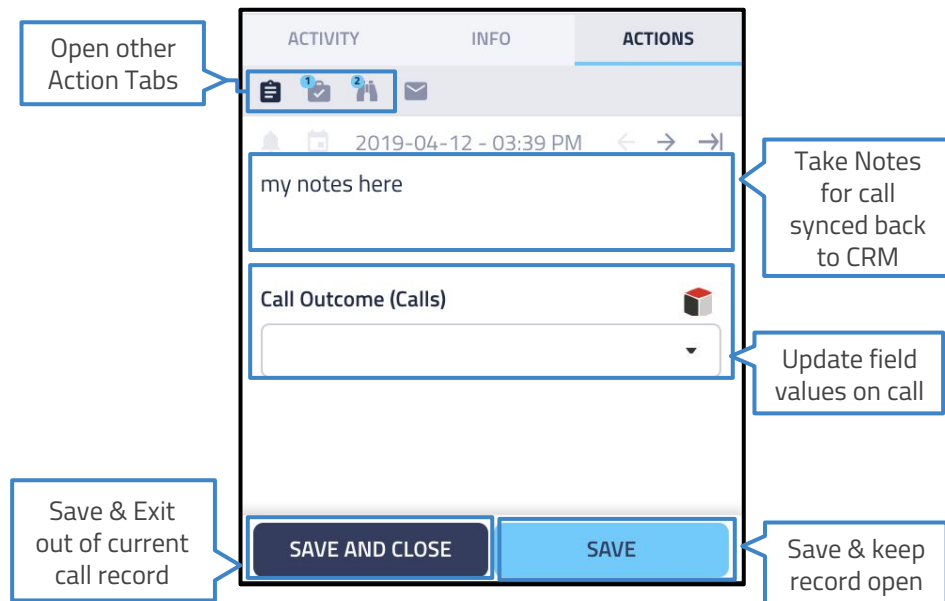
**Action tab:** The Action tab is meant for just that -- taking action. The Action tab provides a long list of functionality and can be highly tailored to meet the unique needs of you and your team's workflow. On the Action tab, you can:

- ❑ Take and save your call notes
- ❑ Create follow-up activities
- ❑ @mention colleagues with your notes
- ❑ update fields/dispositions\*
- ❑ Relate calls to opportunities or cases\*
- ❑ Create new opportunities or cases\*
- ❑ Relate and create custom objects (i.e. Proposals)\*
- ❑ Launch a screen-share/video call\*
- ❑ Send an email template via mail:to links\*
- ❑ Send an SMS (text message)\*

\*Feature not available in all plans and may incur additional monthly or variable cost ; please check with your Tenfold admin for more details on these features



Action tab - Notes and Dispositions



The screenshot shows the 'ACTIONS' tab in the Tenfold interface. It includes a header with 'ACTIVITY', 'INFO', and 'ACTIONS'. Below the header is a toolbar with icons for notes, call, and email. The main content area contains a text input field with 'my notes here', a 'Call Outcome (Calls)' dropdown menu, and two buttons at the bottom: 'SAVE AND CLOSE' and 'SAVE'. Callouts point to these elements with the following descriptions:

- Open other Action Tabs (points to the toolbar icons)
- Take Notes for call synced back to CRM (points to the text input field)
- Update field values on call (points to the 'Call Outcome (Calls)' dropdown)
- Save & Exit out of current call record (points to the 'SAVE AND CLOSE' button)
- Save & keep record open (points to the 'SAVE' button)



NLP Tasks & @mention

**NLP Tasks:** Tenfold uses natural language processing (NLP) to automate task creation by detecting action phrases and dates.

Calendar icon Indicates Task is being created

**Action Phrases:** "Call", "Follow Up", "FU", "CB", "Task", "Remind me to call", "Remind", "Remind me", "Retry", "Try again"

**Dates:** Days of the week, "morning", "afternoon", "in a week", "in x weeks", "next month", "in two months" and specific Dates.

Easily share notes with colleagues using @mention in your notes

Opps Cases



Action tab - Opportunities/Cases

Relate call to Opp/Case

View Opp/Case Details

Refresh List

Open Opp/Case Detail View

CREATE NEW OPPORTUNITY

**Creating New Opps/Cases:** Clicking the "Create New Opportunity/Case" button will launch you into your standard Creation flow in SugarCRM, opening up the new opp/case for you to edit with pre-filled info.

Click-to-create a new Opp/Case in SugarCRM

## 8.1 Data Captured When Logging Calls

Capturing calls in SugarCRM is a key capability of Tenfold. Tenfold is uniquely able to log all calls, even when a user is not logged into the CRM, making sure you get credit for all activities and the business has visibility into all calls that are made.

There are 3 main types of data that are captured for every call:

**Call Metadata:** This consists of all of the automated information received from the phone system about the call:

- Start/Stop Time and Duration
- Inbound or Outbound
- Extension call was made to
- Related Record
- Inbound Number Dialed or VDN/Skill\*
- Link to Call Recording\*
- Customer Journey data\*

\*Only available on some plans and specific integrations

**User Captured Data:** This consists of all of the information that a user captures about the call during and after the call:

- Notes
- Follow ups/Next Steps
- Call Dispositions
- Related Object (i.e. Case/Opportunity)
- Other actions taken on the call

**Third Party Data:** This can include a wide array of information based on additional 3rd party integrations. Examples include:

- Demographic Data (i.e. Age, Gender)\*
- Location (Address, City, State)\*
- Social Data (i.e. profiles, interests, profile photo)\*
- Device Information (i.e. Carrier, Line-type)\*
- Business Information (i.e. Employees, Revenue)\*

\*Only available on some plans and may incur additional fees

## 8.2 Call Data in SugarCRM

Calls are captured in SugarCRM as Calls, Tenfold captures data into a standard set of fields on these SugarCRM Objects. Here's a breakdown of that mapping:

SugarCRM Field	Tenfold Data
Contact	Matched Record
Assigned To	User Making/Receiving the call
Linked Record(s)	Related Object(s) Name
Description	Notes
Date Start / Date End	Date/Time of Call
Direction	Call Direction
Duration Hours	Duration of the Call in Hours
Duration Minutes	Duration of the Call in Minutes (full duration with hours)

Tenfold will also automatically set default values in SugarCRM Calls for some fields. These include the following:

SugarCRM Field	Tenfold Default Value
Type	Call Module
Subject	IBC:/OBC: + " <Notes up to char limit>..."
Status	Held
Created By	SugarCRM API User connected to Tenfold
Modified User	SugarCRM API User connected to Tenfold

Most of this data is captured automatically with the exception of Notes and related objects (depending on your settings). If you organization is using dispositions, these are captured by selecting the field updates from the Tenfold UI for a call.

### 8.3 Example Call Log from SugarCRM

CI
OBC:Here are my call notes for this call. Here ... ☆
Following
Held
Cancel
Save

<b>Start &amp; End Date</b>	<b>Repeat Type</b>
02.12.2018 09:27pm - 09:27pm (0 minutes)	
<b>Call Outcome</b>	<b>Call Purpose</b>
Demo/Meeting Set	Billing
<b>Description</b>	
Here are my call notes for this call. Here are my call notes for this call.Here are my call notes for this call.Here are my call notes for this call.Here are my call notes for this call.Here are my call notes for this call.Here are my call notes for this call.	
<b>Contact</b>	
<a href="#">Jerry Rice</a>	
<b>Assigned to</b>	
<a href="#">System Admin</a>	
<b>Account Entities</b>	call dispos
<b>Date Created</b>	<b>Date Modified</b>
04.12.2019 02:57pm by <a href="#">Jonathan Chan</a>	04.12.2019 02:57pm by <a href="#">Jonathan Chan</a>



## 9.1 Tenfold Analytics Visibility & Date Range

The [Tenfold Analytics page](#) can provide your Organization with a wealth of knowledge regarding the productivity of your Organization, Teams and Users. Depending on your visibility settings, you can either get a broad look your Organization or gather information on how individual Teams or Users are performing. You can also configure the date range. See below:

Select View

Company Teams Team Users You

Select Date Range

04/01/2019 - 04/02/2019

04/16/2019 04/25/2019

12:00 AM 12:00 AM

April 2019 May 2019

Sun Mon Tue Wed Thu Fri Sat Sun Mon Tue Wed Thu Fri Sat

31 1 2 3 4 5 6 28 29 30 1 2 3 4

7 8 9 10 11 12 13 5 6 7 8 9 10 11

14 15 16 17 18 19 20 12 13 14 15 16 17 18

21 22 23 24 25 26 27 19 20 21 22 23 24 25

28 29 30 1 2 3 4 26 27 28 29 30 31 1

5 6 7 8 9 10 11 2 3 4 5 6 7 8

Today  
Yesterday  
This week  
Last week  
This month  
Last month  
This year  
Last year  
Custom Range  
Apply Cancel

Preset Date Ranges

## 9.2 Tenfold Analytics Overview

The Tenfold Analytics Dashboard provides several components. This section provides an overview of these items.

**Tenfold Leaderboard:** The leaderboard calls out Top Performers for your Organization in a few categories as outlined below:

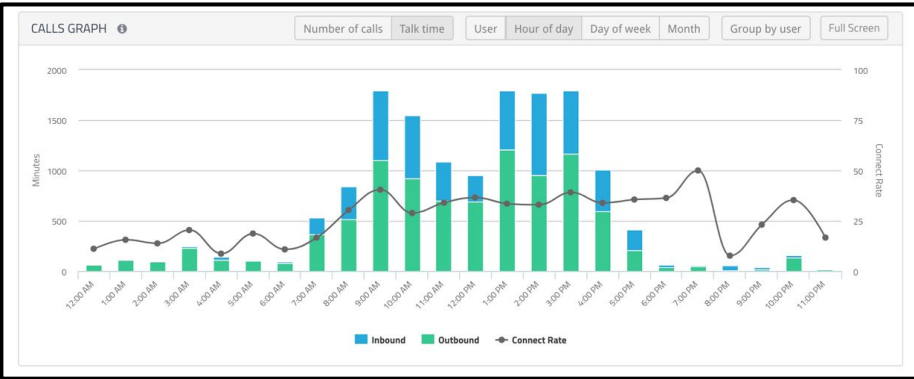
LEADERBOARD

 <b>GOOD SUMARITAN</b> Manjula Kumari <i>Most call notes</i>	 <b>OVERCLOCKER</b> Prageet Surothiya <i>Longest on the phone</i>	 <b>QUALITY CONNECTOR</b> Prageet Surothiya <i>Most quality connects</i>	 <b>DR. DEPENDABLE</b> robert hammond <i>Most inbound calls</i>
---	--	---	--

The Leaderboard categories are subject to change but currently include the following:

- Most Call Notes
- Longest on the Phone
- Most Quality Connects
- Most Inbound Calls Handled

**Call Graphs:** The Calls Graph will give your Organization a visual representation of your performance. The data presented in this graph can be dynamically updated to represent the type of information you need. The filters provided are: Number of Calls vs. Call Time and User vs. Hour of Day. See a visual below:



**User Table:** This table gives calls statistic summaries for each User tracked during the selected timeframe. Clicking on a username will provide you with a detailed list of the User’s calls. Statistics can be filtered further by Inbound or Outbound calls.

Note that the thresholds for “Long Calls” and “Connects” are set by your Admin in the Company Settings. See below:

Name	Totals					Outbound					
	Calls	Time	Avg Time	Notes	CRM	Calls	Target	Long Calls	Time	Target	Connects
Hannah Crow	745	35h13	2m50	148	81.1%	587	2,610	76	25h14	00s	25.7%
Eleanor Grisebaum	48	1h55	2m24	18	83.3%	35	0	1	1h10	00s	31.4%
Vivek Kumar	255	17h52	4m12	14	64.7%	105	0	7	3h50	522h	21.9%
Alex Wettreich	173	54h02	18m44	5	50.3%	139	0	97	49h39	00s	78.4%
robert hammond	388	34h38	5m21	4	61.3%	175	13,050	35	15h10	522h	45.1%
Thomas Webster	324	54h19	10m03	4	62.0%	232	0	48	19h47	00s	33.2%
Sean Pinegar	87	12h50	8m51	2	40.2%	54	0	24	12h20	522h	50.0%
Manjula Kumari	43	40m48	56s	1	34.9%	31	0	0	14m33	00s	3.2%

**Call History:** Detailed view of each user’s calls, including: Call Time, Call Direction, User’s Extension, Phone Number, Duration of Call, CRM Match (Y/N), CRM Contact, Description (Notes).

Note that calls that do not match a CRM record or that end in a multiple-match or no-match scenario will not show a CRM contact in the User Table.

## 10.1 Self-Service Troubleshooting

The [Tenfold Knowledge Base](#) is a great resource for up to date information on Tenfold's solution, configuration of features/functionality, as well as troubleshooting of common issues. Common issues include:

- Click-to-Dial not Working
- Calls not Logging
- Tenfold UI not Responsive to Calls
- Not matching (Showing Unknown despite matches)
- Users not Showing in Dashboard

If issues are only affecting a single user, take these steps:

- Confirm the User's Extension is Assigned properly
- Login/Logout of Tenfold
- Uninstall/Re-Install Extension (Chrome Extension only)

If none of these steps work, contact Tenfold's support team.

## 10.2 Contacting Tenfold Support

Tenfold offers two levels of support for Customers. Standard Support available between 8am and 7pm US Central Time (GMT-05:00) and Premium Support which is available 24/7. If you would like to confirm which support model your company currently has in place or request more information on Premium Support, please contact your customer success manager of the tenfold support team at [support@tenfold.com](mailto:support@tenfold.com).

Tenfold's support team is here to help across several channels:

- Chat with us from the website (or leave a message)
- Email [support@tenfold.com](mailto:support@tenfold.com) (auto-creates ticket)
- Call Tenfold's support team at 415-599-1170

Or for less urgent matters, you can reach out to your customer success manager for assistance.

We look forward to supporting you at Tenfold!