

Tenfold CRM Integration: Knowledge Base

Tenfold Resources

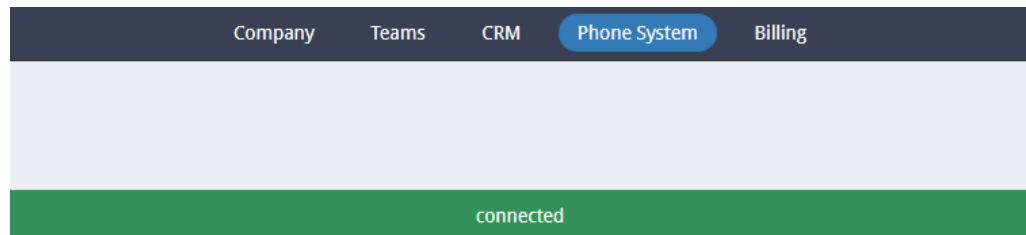
- <https://www.tenfold.com/integrations>
- <https://www.tenfold.com/support-center>
- <https://www.tenfold.com/download>
- Status Alerts from Tenfold: <https://status.tenfold.com/>

Step 1: Phone System is Authenticated to Evolve IP

This is the PRIMARY step that's managed by Evolve IP

The Phone System authentication shows "Connected" is ready for your preferred CRM to be authenticated to the Tenfold dashboard: <https://dashboard.tenfold.com/>

|

A screenshot of the Evolve IP authentication form. At the top center is the 'EVOLVE IP' logo with the tagline 'THE CLOUD SERVICES COMPANY™'. Below the logo is a dropdown menu currently showing 'Evolve IP'. Underneath the dropdown are three input fields. The first is labeled 'Username' and contains the text 'ga-Tenfold-Salesforce@voip.evolveip.net'. The second is labeled 'Password' and contains the placeholder text 'To change enter a new password'.

Step 2: Tenfold IP Addresses to White list (OPTIONAL)

<https://www.tenfold.com/support-center/whitelist-ip-addresses>

This link points to the IP's that require to be white-listed to seamlessly work with the Tenfold UI. If the users that this solution will be deployed to are in the office; then it's a one-time update to be made by your IT admins. However, if the traffic is successfully traversing without issue on the current network, an update might not be required.

Step 3: Authenticate your CRM and deploy Tenfold

ON-BOARDING CUSTOMERS ON TENFOLD: TENFOLD DASHBOARD AND FEATURES REVIEW

- [Onboarding-Customers-On-Tenfold_PM_EvolveIP.pdf](#)
- [Tenfold Administrator Guide v0.1.pdf](#)

Client ADMIN master guide that provides an Onboarding checklist, process, training, review of features and functionality.

CRM Specific integration guides, videos walk-through, and end-user documentation are found below:

Information on Tenfold CRM UI

<https://www.tenfold.com/download>

All the Tenfold CRM downloads are based off of the same UI, meaning the end user experience is the SAME across all three software packages.

Salesforce Open CTI/Dynamics Embedded UI/ZenDesk Embedded UI: the version package is controlled by CRM admin and can be installed to sandbox or production.

Tenfold Chrome UI (updated): Chrome Extension download that is managed by Tenfold vendor. Updates to the extension is deployed with any bug fixes and/or Chrome Browser updates.

Tenfold Desktop App: Application that is downloaded and installed to local workstation. Is version controlled by CRM/IT admin to end users.

NOTE: Tenfold Desktop Application requires **Tenfold Click-to-Dial Chrome Extension** for Outbound CTD calling.

Salesforce Integration Guide

<https://vimeo.com/353836996>

Tenfold Salesforce Desktop User Guide



Tenfold Desktop... Guide V1.1.pdf

Tenfold Salesforce OpenCTI User Guide



Tenfold for Sales...TI User Guide.pdf

B. Microsoft Dynamics

MS Dynamics Integration Guide - references permissions and roles.



Tenfold Integrat...oft Dynamics.pdf

Tenfold MS Dynamics (DESKTOP) User Guide



Tenfold Desktop... Guide V1.1.pdf

Installing the Microsoft Dynamics Embedded UI

E. Zendesk

[Zendesk Integration Guide](#)

[Zendesk Embedded UI Installation Guide](#)

D. Netsuite

[NetSuite RESTlet Setup](#)

[Netsuite – Saving Notes to a Contact](#)

Tenfold NetSuite (DESKTOP) User Guide



Tenfold Desktop... User Guide.pdf

C. Sugar CRM

[SugarCRM Integration Guide](#)

[SugarCRM Advanced Options](#)

Tenfold SugarCRM (DESKTOP) User Guide



Tenfold Desktop... Guide V1.1.pdf

F. Bullhorn

G. ServiceNow

Tenfold ServiceNow (DESKTOP) User Guide



Tenfold Desktop... Guide V1.1.pdf

H. Oracle Sales Cloud

[Oracle Integration Guide](#)