AT&T Office@Hand

Office@Hand for SugarCRM

Powered by Tenfold

Admin Guide for configuring SugarCRM integration

Powered by tenfold

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Introduction

Audience

This document is directed to customers and prospective customers interested in using Tenfold and Office@Hand in a SugarCRM environment. Those who will perform the procedures described in this guide should have a basic level of familiarity with SugarCRM APIs, SugarCRM administration, general networking, and Tenfold.

Goals

The goal of this document is to provide knowledge, reference, and procedural information necessary to understand a proposed SugarCRM/Tenfold/Office@Hand integration. This document is NOT intended as a specific system or network design document. If further clarification is needed, please contact Office@Hand support at support.ringcentral.com or call 1-888-528-7464.

Customer Responsibilities

You are responsible for supplying the physical and/or IP connection(s) to SugarCRM and LAN, and for obtaining and loading any licensing required by SugarCRM. You are also responsible for configuring SugarCRM to support the Tenfold integration.

Terminology

To ensure a common frame of reference, this guide uses the following terms in conjunction with this SugarCRM integration:

• **Application Programming Interface (API):** A set of clearly defined methods of communication used by Tenfold for reading and writing data.

• **Click to Dial:** A feature in the Tenfold UI that allows agents to click a phone number to dial a contact.

• **Tenfold Cloud:** A set of Web Services that receives events from the telephony system and takes further action such as querying and saving to the CRM.

• **Tenfold User Interface (TUI):** An agent facing user interface that agents will interact with for identifying callers, viewing recent activities, saving notes, dispositioning calls, etc.

Integration Overview

Connection Requirements

- Accessible via TCP port 443 (https) to Tenfold Cloud
- Dedicated Service Account (i.e., API User)

Field Permissions

The tables below outline the out-of-the-box entities and respective field permissions required for the core Tenfold integration. Read and/or write permissions for additional fields, both standard and custom, may be required for your Tenfold deployment

Users

Entity–Users	Field	Required Permissions
Users	id	Read
Users	full_name	Read
Users	email_address (primary)	Read
Users	user_name	Read
Users	status	Read
Users	team_id (primary)	Read

Accounts

Entity–Accounts	Field	Required Permissions
Accounts	id	Read
Accounts	name	Read/Write
Accounts	description	Read/Write
Accounts	email_address (primary)	Read
Accounts	assigned_user_id	Read/Write
Accounts	date_entered	Read/Write
Accounts	account_type	Read
Accounts	status	Read
Accounts	phone_office	Read/Write
Accounts	phone_alternate	Read/Write

Contacts

Entity–Contacts	Field	Required Permissions
Contacts	id	Read
Contacts	first_name	Read/Write
Contacts	last_name	Read/Write
Contacts	description	Read/Write
Contacts	email_address (primary)	Read
Contacts	assigned_user_id	Read/Write
Contacts	date_entered	Read/Write
Contacts	phone_home	Read/Write
Contacts	phone_mobile	Read/Write
Contacts	phone_work	Read/Write
Contacts	phone_other	Read/Write
Contacts	assistant_phone	Read/Write

Leads

Entity–Lead	Field	Required Permissions
Leads	id	Read
Leads	first_name	Read/Write
Leads	last_name	Read/Write
Leads	description	Read/Write
Leads	email_address (primary)	Read/Write
Leads	assigned_user_id	Read/Write
Leads	created_by	Read/Write
Leads	modified_user_id	Read/Write
Leads	set_created_by	Read/Write
Leads	status	Read
Leads	phone_home	Read/Write
Leads	phone_mobile	Read/Write
Leads	phone_work	Read/Write
Leads	phone_other	Read/Write
Leads	assistant_phone	Read/Write

Calls

Entity–Phone Call	Field	Required Permissions
Calls	id	Read
Calls	name	Read/Write
Calls	status	Read/Write
Calls	description	Read/Write
Calls	date_start	Read/Write
Calls	date_end	Read/Write
Calls	duration_hours	Read/Write
Calls	dration_minutes	Read/Write
Calls	assigned_user_id	Read/Write
Calls	created_by	Read/Write
Calls	direction	Read/Write
Calls	modified_user_id	Read/Write

Tasks

Entity–Task	Field	Required Permissions
Tasks	id	Read
Tasks	name	Read/Write
Tasks	description	Read/Write
Tasks	date_start	Read/Write
Tasks	date_due	Read/Write
Tasks	parent_type	Read/Write
Tasks	parent_id	Read/Write
Tasks	assigned_user_id	Read/Write
Tasks	created_by	Read/Write
Tasks	modified_user_id	Read/Write

Opportunities

Entity–Opportunity	Field	Required Permissions
Opportunities	id	Read
Opportunities	name	Read/Write
Opportunities	description	Read
Opportunities	created_by_name	Read
Opportunities	assigned_user_name	Read
Opportunities	amount	Read
Opportunities	date_entered	Read
Opportunities	date_closed	Read
Opportunities	probability	Read
Opportunities	sales_stage	Read

Note: Tenfold launches the new opportunity creation view in SugarCRM and does not create the opportunity via the API.
For this reason, we do not require write access to many of the fields on the opportunity module via the API.

Cases

Entity–Cases	Field	Required Permissions
Cases	id	Read
Cases	created_by_name	Read
Cases	assigned_user_name	Read
Cases	name	Read
Cases	description	Read
Cases	case_number	Read
Cases	priority	Read
Cases	source	Read
Cases	status	Read
Cases	date_entered	Read

Note: Tenfold launches the new case creation view in SugarCRM and does not create the case via the API.
For this reason, we do not require write access to many of the fields on the case module via the API.

Installation

Installation Process: OAuth 2.0

Overview

Establishing the initial connection from Tenfold to SugarCRM takes only a few minutes.

Entity–Cases	Field
SugarCRM Hostname	Hostname of your SugarCRM Instance
SugarCRM Service Account Username	The username for the dedicated Tenfold service account (i.e., API User)
SugarCRM Service Account Password	The password for the dedicated Tenfold service account (i.e., API User)
Platform	Platform to be used by the service account. Default is “base”. It is recommended to create a platform value specifically for Tenfold to avoid conflicts between Tenfold and other integrations or Sugar apps.

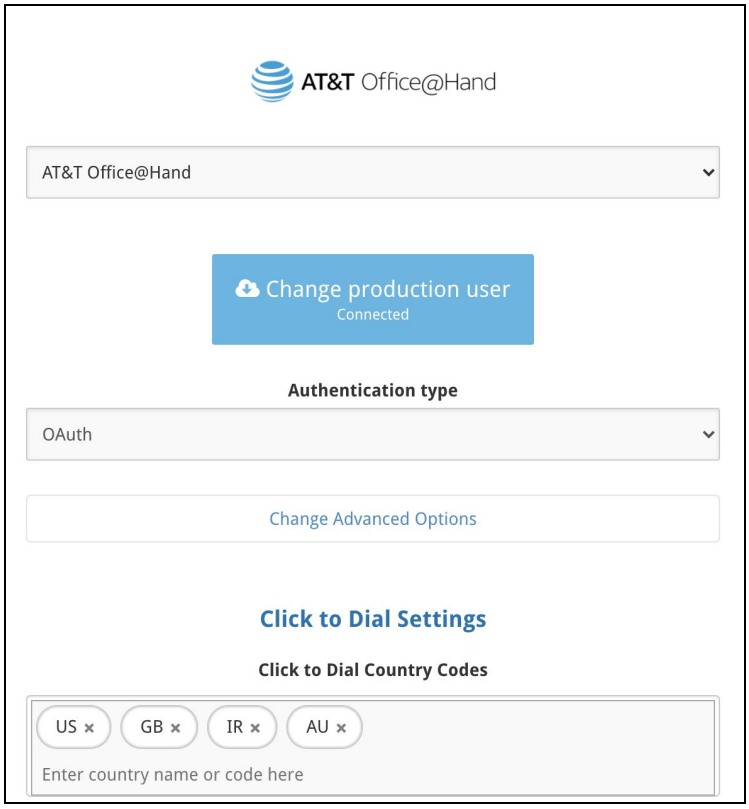
Tenfold Account Creation and Dashboard Setup

New customers of the integration are taken through an onboarding wizard where CRM admins of the company can follow a step-by-step procedure to establish and test the connection with their CRM, Tenfold, and Office@Hand. **Alternatively, administrators can follow the same steps for CRM and Phone System connections from their Tenfold dashboard as detailed below.**

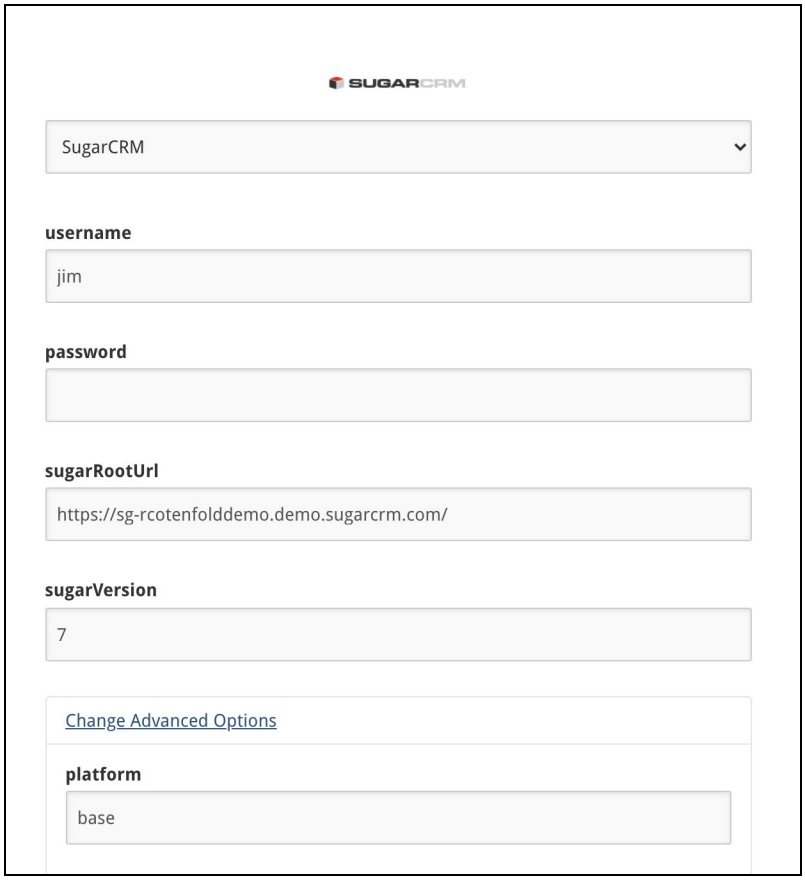
Overview for Tenfold dashboard

Establishing the initial connection from Tenfold to SugarCRM takes only a few minutes.

1. Start by navigating to your Tenfold dashboard at https:// dashboard.tenfold.com.
2. Select the **Company Settings** link in the top navigation.
3. In the sub-navigation, select **Phone Settings.**
4. Make sure **Office@Hand** is selected from the drop-down menu.
5. Enter the relevant Office@Hand credentials for the BU’s API user:
    - Username
    - Password
    - Admin or Super-Admin Extension

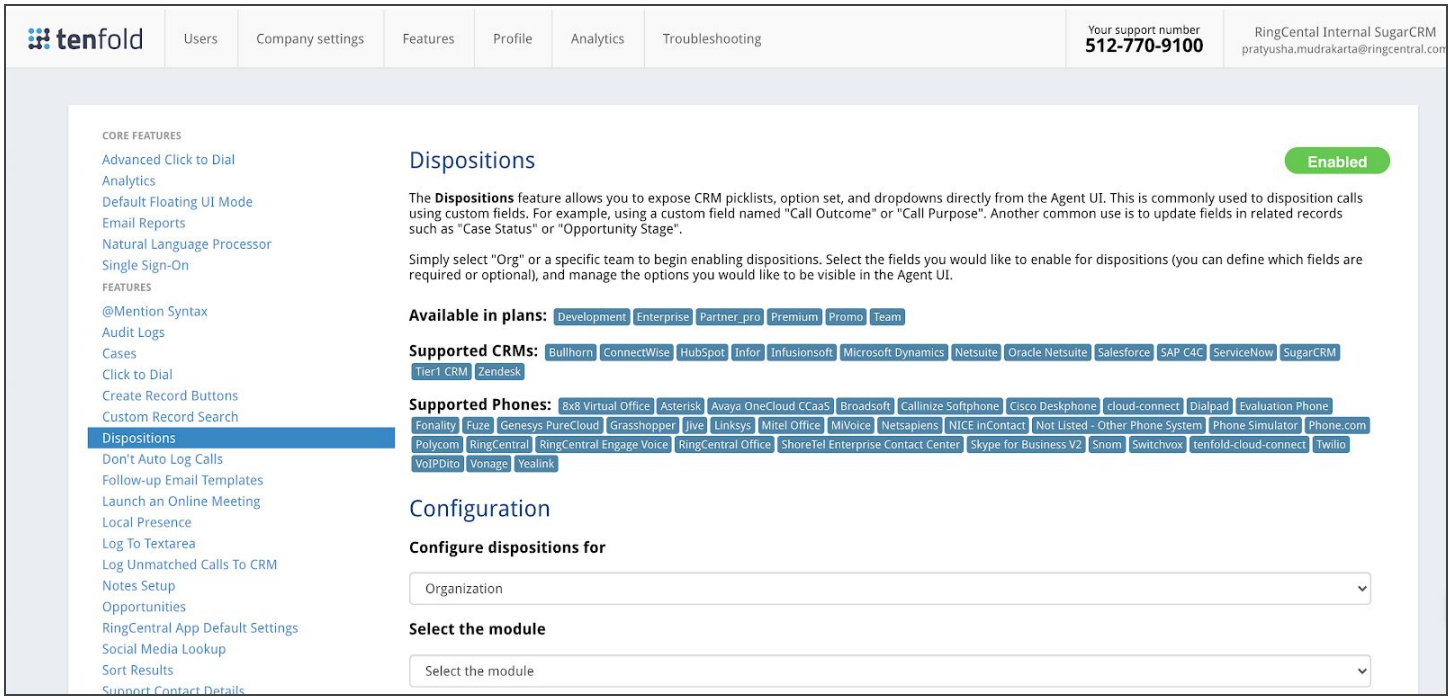


6. Select the **Company Settings** link in the top navigation.
7. In the sub-navigation, select **CRM**.
8. Select Bullhorn as your **CRM**.
9. Click **Connect with Bullhorn** to initiate O-Auth token connection.
10. Select between **Task** and **Notes** for where you would like calls saved.
11. Check **Append call duration** to notes to add call duration to the end of any notes taken by users.
12. Click **Save**. Tenfold will test the connection and present a success message if the info is correct.



Feature Setup

Setting up features will allow you to better utilize what Tenfold has to offer. To enable and update features, log in to your **Tenfold dashboard**. In the top left, click on **Features**. – Here you will be able to adjust the individual user features such as click to dial, enable/disable SSO, and more.



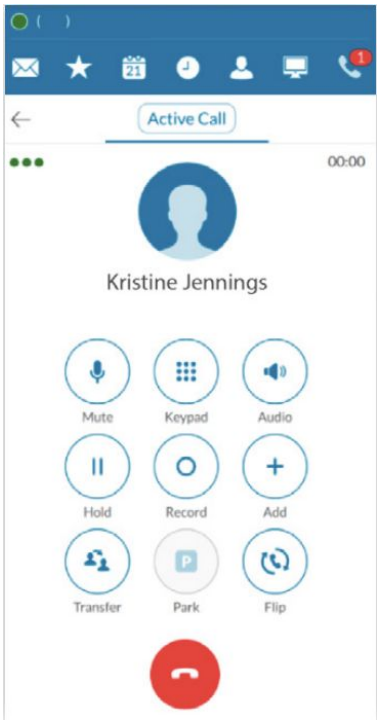
Using Tenfold with Office@Hand

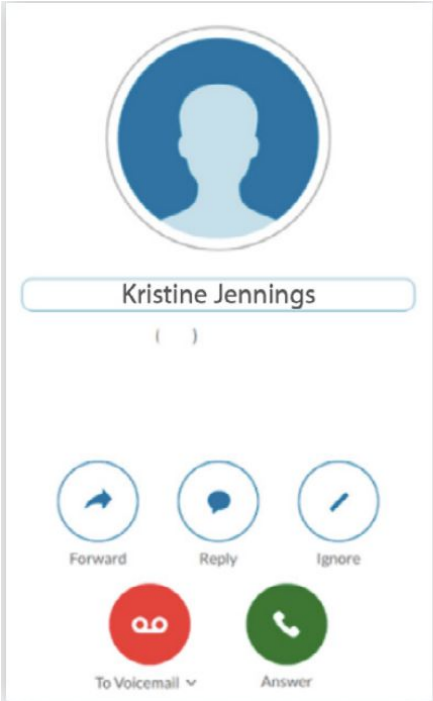
Note: For the following calling features, users need to install the Office@Hand softphone app. For call logging and notes, users need to install the Tenfold Chrome extension

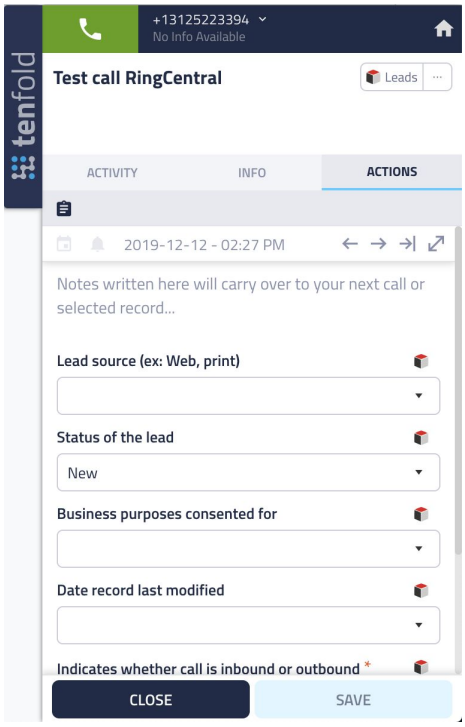
Call Controls give users the option of managing their calls directly from within the Office@Hand SoftPhone™ desktop app. Control options include the Mute, Keypad, Hold, Record, Transfer and more.

Inbound Calling automatically captures inbound calls in CRM whether or not a user interacts with the Tenfold UI or the Office@Hand SoftPhone desktop app.

Outbound Calling allows users to place a call through the Office@Hand SoftPhone desktop app. The appropriate record is then matched in the Tenfold UI. All calls will reflect in call history, both in the Tenfold and Office@Hand apps.







Support

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