# RingCentral for Bullhorn

Powered by Tenfold

**Admin Guide for configuring Bullhorn integration**

Powered by tenfold

# Contents

# Introduction

## Audience

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

## Goals

The goal of this document is to provide knowledge, reference, and procedural information necessary to understand a proposed Bullhorn/Tenfold/RingCentral integration. This document is NOT intended as a specific system or network design document. If further clarification is needed, please contact RingCentral 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 Bullhorn and LAN, and for obtaining and loading any licensing required by Bullhorn. You are also responsible for configuring Bullhorn to support the Tenfold integration.

## Terminology

To ensure a common frame of reference, this guide uses the following terms in conjunction with this Bullhorn 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.

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RingCentral

# 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—User | Field | Required Permissions |
|---|---|---|
| User | id | Read |
| User | firstName | Read |
| User | lastName | Read |
| User | email | Read |
| User | phone | Read |
| User | username | Read |

### CorporateUser

| Entity—CorporateUser | Field | Required Permissions |
|---|---|---|
| User | id | Read |
| User | firstName | Read |
| User | lastName | Read |
| User | mobile | Read |
| User | phone | Read |

## Lead

| Entity—Lead | Field | Required Permissions |
|---|---|---|
| Lead | id | Read |
| Lead | name | Read |
| Lead | firstName | Read |
| Lead | lastName | Read |
| Lead | email | Read |
| Lead | description | Read |
| Lead | comments | Read |
| Lead | dateAdded | Read |
| Lead | mobile | Read |
| Lead | phone | Read |
| Lead | phone2 | Read |
| Lead | phone3 | Read |

## ClientContact

| Entity—ClientContact | Field | Required Permissions |
|---|---|---|
| ClientContact | contactid | Read |
| ClientContact | parentcustomerid | Read |
| ClientContact | FullNameField | Read |
| ClientContact | firstname | Read |
| ClientContact | lastname | Read |
| ClientContact | ownerid | Read |
| ClientContact | emailaddress1 | Read |
| ClientContact | mobilephone | Read |
| ClientContact | telephone1 | Read |
| ClientContact | telephone2 | Read |
| ClientContact | telephone3 | Read |
| ClientContact | description | Read |
| ClientContact | statuscode | Read |
| ClientContact | createdon | Read |

## Candidate

| Entity—Lead | Field | Required Permissions |
|---|---|---|
| Candidate | id | Read |
| Candidate | firstName | Read |
| Candidate | lastName | Read |
| Candidate | email | Read |
| Candidate | description | Read |
| Candidate | comments | Read |
| Candidate | dateAdded | Read |
| Candidate | mobile | Read |
| Candidate | phone | Read |
| Candidate | phone2 | Read |
| Candidate | phone3 | Read |
| Candidate | workPhone | Read |

## Opportunity

| Entity—Opportunity | Field | Required Permissions |
|---|---|---|
| Opportunity | id | Read |
| Opportunity | title | Read |
| Opportunity | isOpen | Read |
| Opportunity | winProbabilityPercent | Read |
| Opportunity | status | Read |
| Opportunity | assignedDate | Read |
| Opportunity | actualCloseDate | Read |
| Opportunity | expectedCloseDate | Read |
| Opportunity | clientContact | Read |
| Opportunity | lead | Read |
| Opportunity | description | Read |
| Opportunity | dateAdded | Read |
| Opportunity | assignedUsers | Read |
| Opportunity | owner | Read |

## Task

| Entity—Task | Field | Required Permissions |
|---|---|---|
| Task | id | Read |
| Task | childTaskOwners | Read |
| Task | candidate | Read |
| Task | clientContact | Read |
| Task | owner | Read |
| Task | description | Read |
| Task | subject | Read |
| Task | isCompleted | Read |
| Task | dateBegin | Read |
| Task | dateEnded | Read |
| Task | dateAdded | Read |

## Note

| Entity—Note | Field | Required Permissions |
|---|---|---|
| Note | id | Read |
| Note | personReference | Read |
| Note | commentingPerson | Read |
| Note | dateAdded | Read |
| Note | action | Read |
| Note | comments | Read |

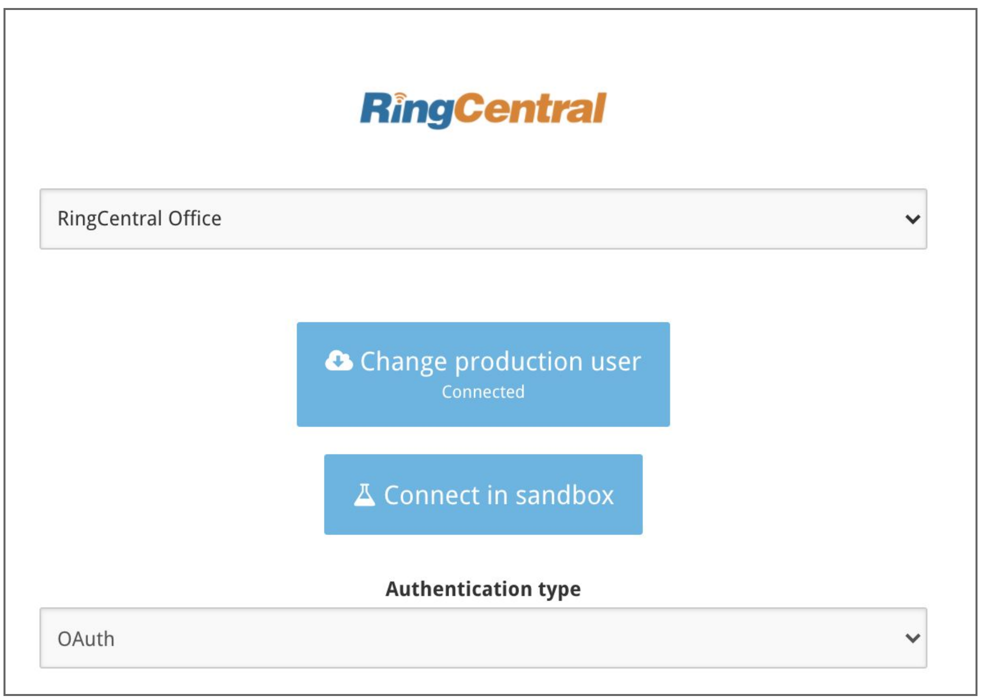
# Installation

## Installation Process: OAuth 2.0

### Overview

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

1. Start by navigating to your Tenfold dashboard at [https:// dashboard.tenfold.com](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 **RingCentral** is selected from the drop-down menu.
5. Enter the relevant RingCentral 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**.

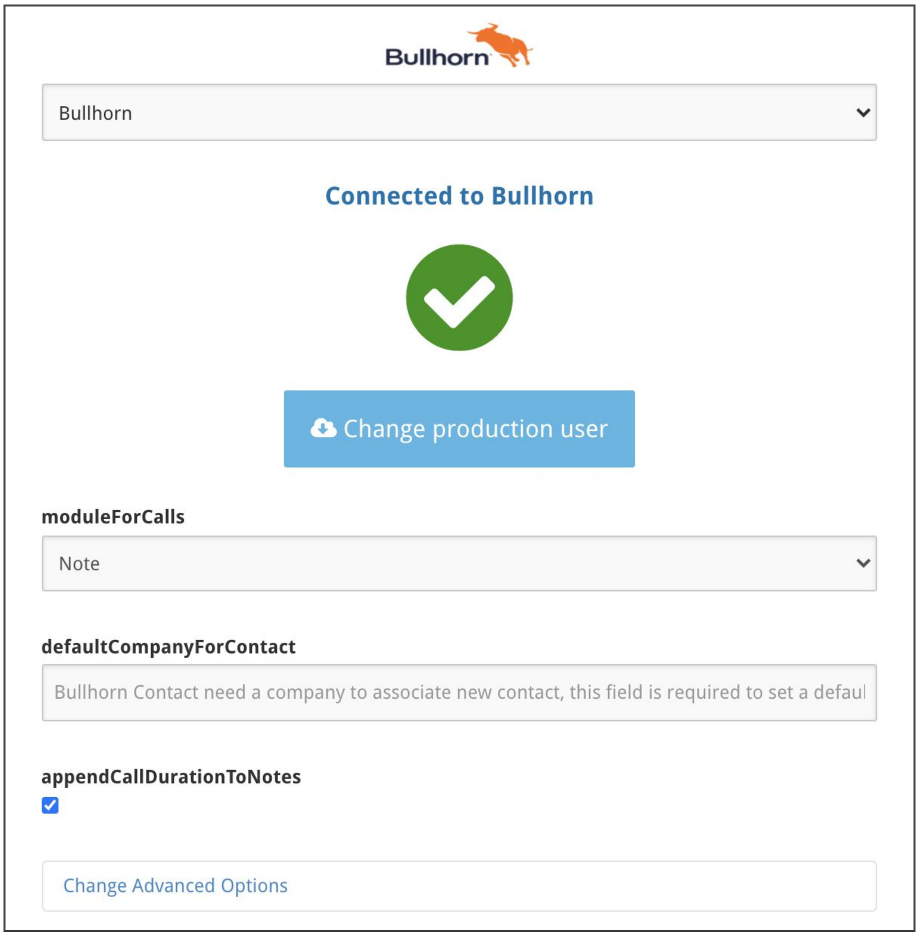
8. Select Bullhorn as your **CRM**.

9. Click **Connect with Bullhorn** to initiate O-Auth token connection.

10. Select between **Task** and **Notes** for where you would like calls saved.

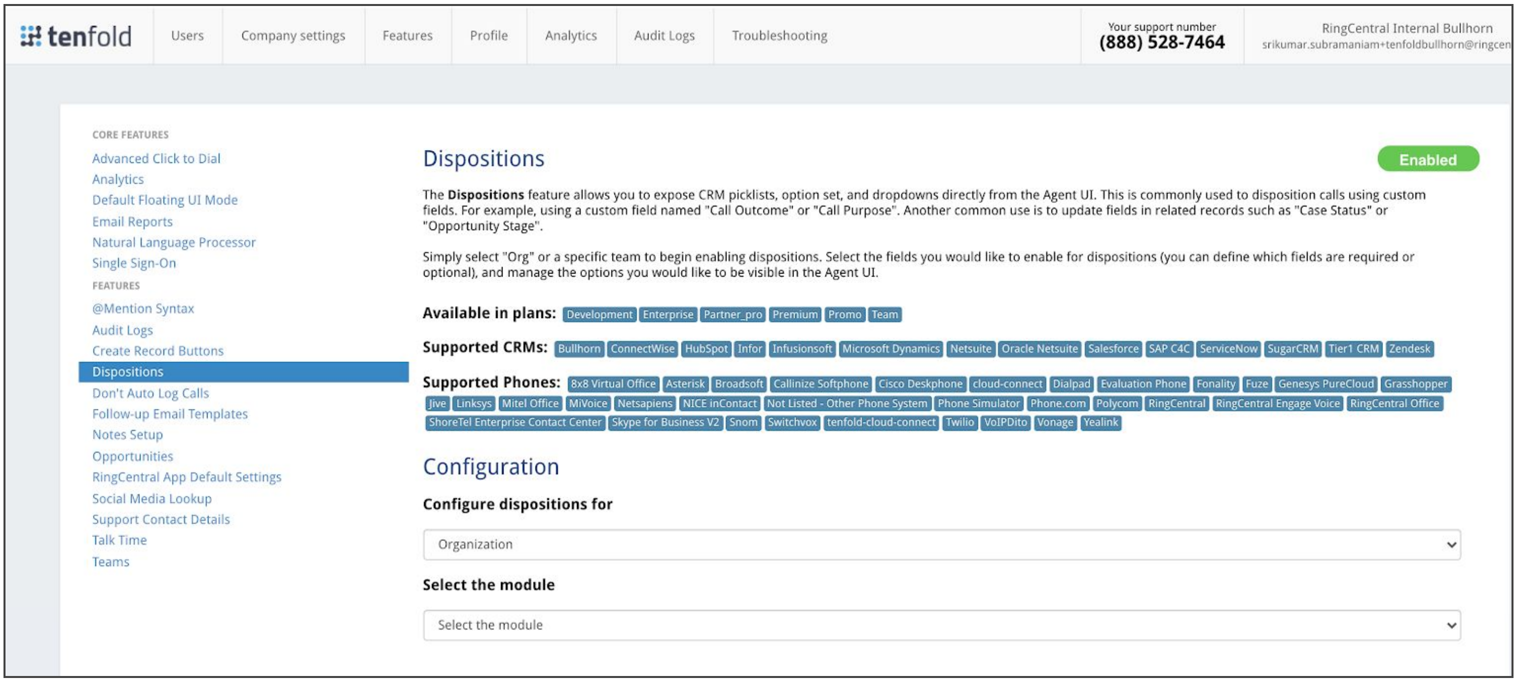
11. Check **Append call duration** to notes to add call duration to the end of any notes taken by users.

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.



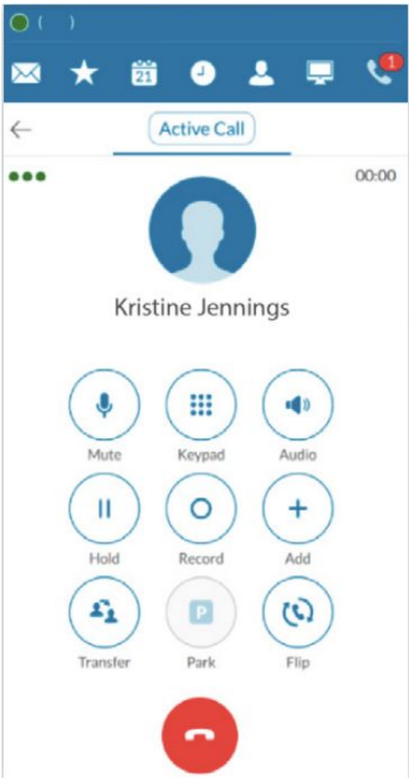

# Using Tenfold with RingCentral

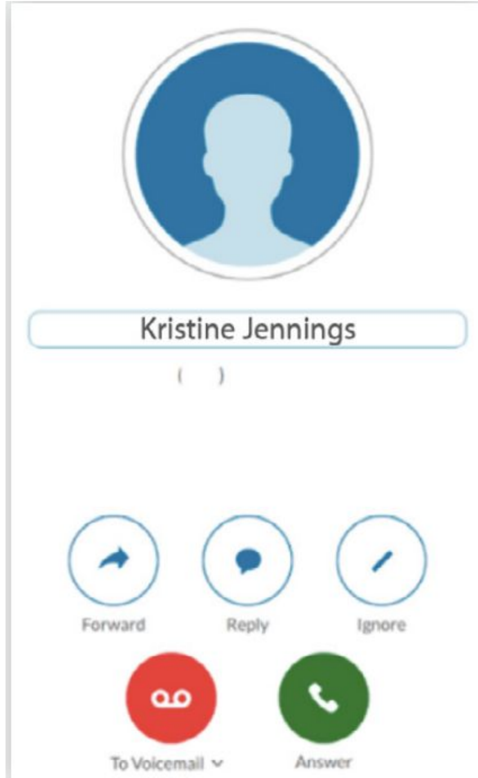
Note: For the following calling features, users need to install the RingCentral softphone app. For call logging and notes, users need to install the Tenfold Chrome extension

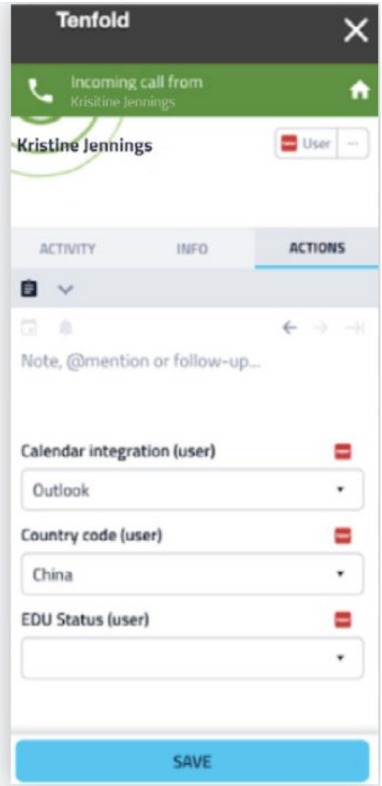
**Call Controls** give users the option of managing their calls directly from within the RingCentral SoftPhone™ desktop app. Control options include the Mute, Keypad, Hold, Record, Transfer and more.

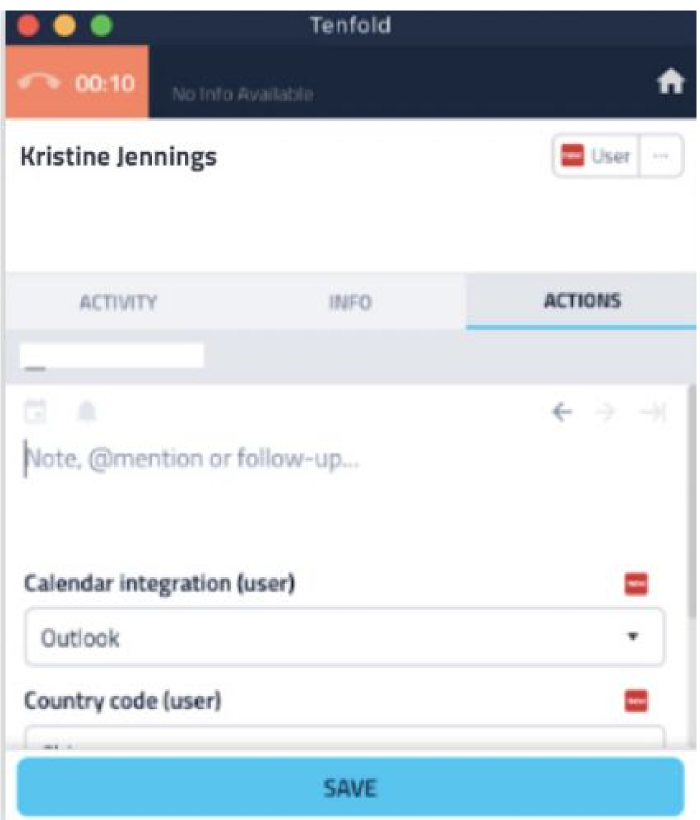
**Inbound Calling** automatically captures inbound calls in CRM whether or not a user interacts with the Tenfold UI or the RingCentral SoftPhone desktop app.

**Outbound Calling** allows users to place a call through the RingCentral 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 RingCentral apps.


Active Call
00:00
Kristine Jennings
Mute
Keypad
Audio
Hold
Record
Add
Transfer
Park
Flip


Kristine Jennings
Forward
Reply
Ignore
To Voicemail
Answer


Tenfold
Incoming call from
Kristine Jennings
User
ACTIVITY
INFO
ACTIONS
Note, @mention or follow-up...
Calendar integration (user)
Outlook
Country code (user)
China
EDU Status (user)
SAVE


Tenfold
00:10
No Info Available
Kristine Jennings
User
ACTIVITY
INFO
ACTIONS
Note, @mention or follow-up...
Calendar integration (user)
Outlook
Country code (user)
SAVE