

RingCentral for Bullhorn

Powered by Tenfold

Admin Guide for configuring Bullhorn integration



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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.

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

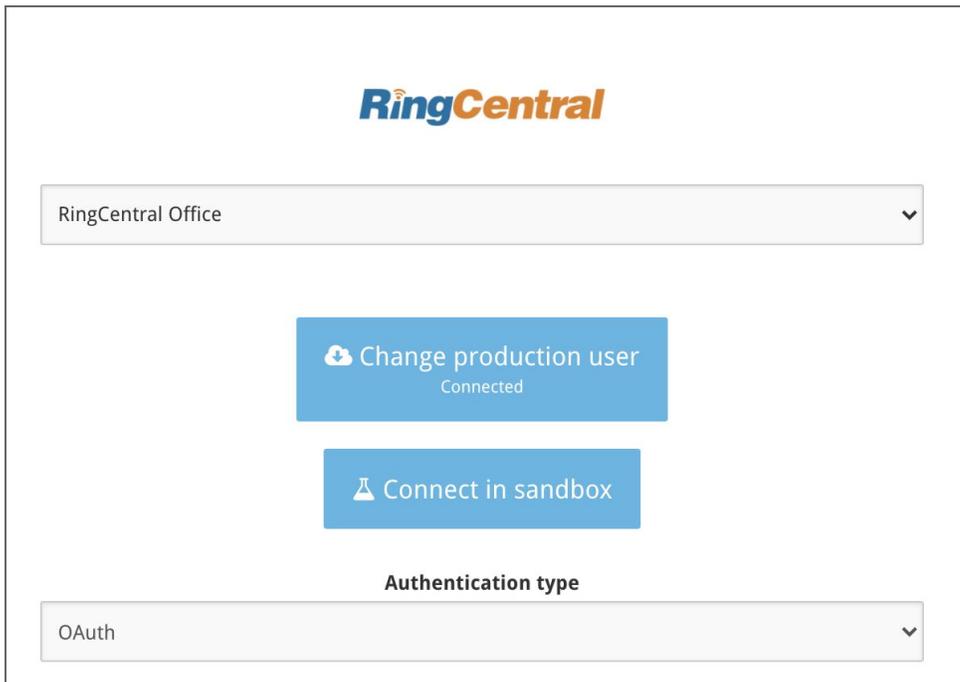
Installation

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



The screenshot displays the RingCentral configuration interface. At the top, the RingCentral logo is visible. Below it, there is a dropdown menu currently showing 'RingCentral Office'. In the center, there are two blue buttons: 'Change production user' with a user icon and the text 'Connected' below it, and 'Connect in sandbox' with a flask icon. At the bottom, there is a section labeled 'Authentication type' with a dropdown menu currently showing 'OAuth'.

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.



Bullhorn
▼

Connected to Bullhorn



Change production user

moduleForCalls

Note
▼

defaultCompanyForContact

Bullhorn Contact need a company to associate new contact, this field is required to set a default

appendCallDurationToNotes

Change Advanced Options
▼

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.

tenfold Users Company settings Features Profile Analytics Audit Logs Troubleshooting Your support number (888) 528-7464 RingCentral Internal Bullhorn srikumar.subramaniam@tenfoldbullhorn@ringcent

Dispositions Enabled

The **Dispositions** feature allows you to expose CRM picklists, option set, and dropdowns directly from the Agent UI. This is commonly used to disposition calls using custom fields. For example, using a custom field named "Call Outcome" or "Call Purpose". Another common use is to update fields in related records such as "Case Status" or "Opportunity Stage".

Simply select "Org" or a specific team to begin enabling dispositions. Select the fields you would like to enable for dispositions (you can define which fields are required or optional), and manage the options you would like to be visible in the Agent UI.

Available in plans: Development Enterprise Partner_pro Premium Promo Team

Supported CRMs: Bullhorn ConnectWise HubSpot Infor Infusionsoft Microsoft Dynamics Netsuite Oracle Netsuite Salesforce SAP C4C ServiceNow SugarCRM Tier1 CRM Zendesk

Supported Phones: 8x8 Virtual Office Asterisk Broadsoft Callinize Softphone Cisco Deskphone cloud-connect Dialpad Evaluation Phone Fonality Fuze Genesys PureCloud Grasshopper Jive Linksys Mitel Office MiVoice Netsapiens NICE InContact Not Listed - Other Phone System Phone Simulator Phone.com Polycom RingCentral RingCentral Engage Voice RingCentral Office ShoreTel Enterprise Contact Center Skype for Business V2 Snom Switchvox tenfold-cloud-connect Twilio VoIPDito Vonage Yealink

Configuration

Configure dispositions for

Organization

Select the module

Select the module

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.

