RingCentral for Bullhorn

Powered by Tenfold

Bullhorn integration User Guide

Powered by

Contents

Introduction

About Tenfold Desktop App for Bullhorn

Tenfold Desktop App for Bullhorn provides seamless integration between Bullhorn 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 Bullhorn provides the following capabilities:

- Click to dial from any phone number in Chrome.
- View screen pops with customer info based on ANI.
- Access Bullhorn records from the Tenfold UI with one click.
- Automatically log inbound and outbound calls.
- Easily capture notes, call dispositions, and next steps.
- Relate calls to standard/custom Bullhorn objects.
- Click to create standard/custom Bullhorn objects.
- Get call data available in Bullhorn for reporting.
- And much, much more...

Intended Audience

This guide is intended for end users from companies leveraging the Tenfold desktop solution for Bullhorn 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 Bullhorn 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.

Essential Download Information

Download the Tenfold Chrome extension and the RingCentral app.
Alternative desktop app versions: For PC: Download installer for Windows (64-bit) ;
For Mac: Download installer for Mac OSX (64-bit)

Users can access the Tenfold downloads page to check all the different versions of Tenfold app.

Tenfold Account Creation and Dashboard Setup

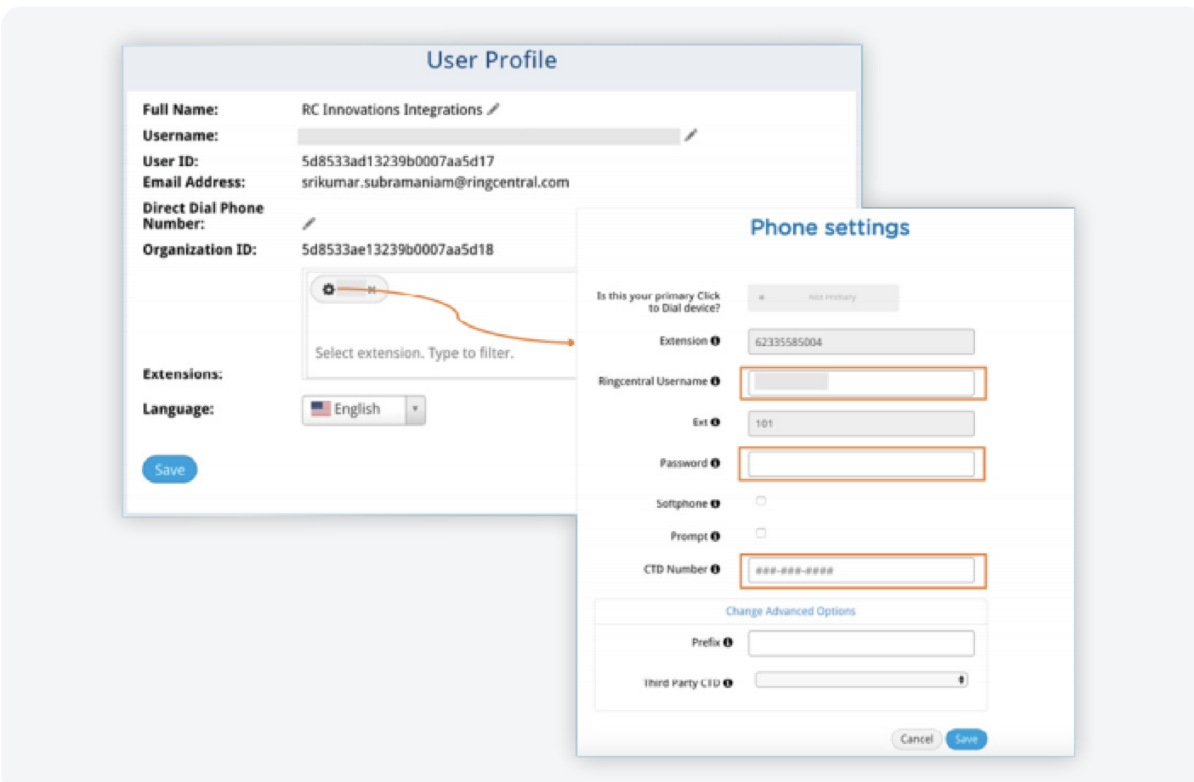
Establishing the Tenfold RingCentral connection takes just a couple of steps.

Step 1:

Your admin will send you an onboarding email that includes instructions to set up your account.

Step 2:

For Credential form of authentication:



Navigate to your **Profile Page** within your Tenfold dashboard. Click on the **gear icon** to set your:

- RingCentral username and password
- Click-to-dial (CTD) number, which is your RingCentral phone number

Note: If you do not see the phone extension, you can manually select it from the drop-down menu and then enter the information above.

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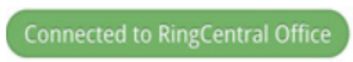
Make sure

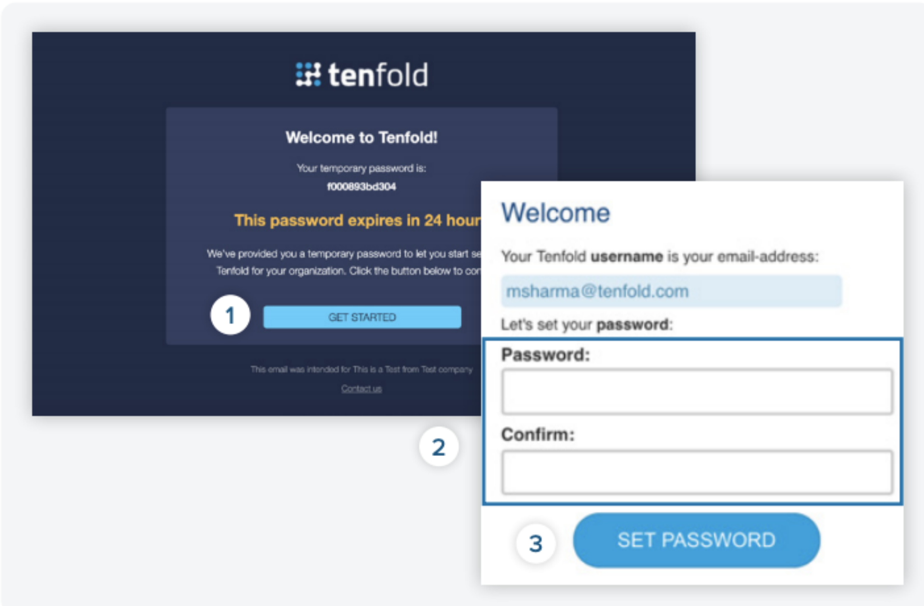
For OAuth form of authentication:

Navigate to your **Profile Page** within your Tenfold dashboard. Scroll down the page and click on the **Connect to RingCentral Office button**. When clicked, it redirects to a RingCentral web page to sign in and authorize using your RingCentral credentials.



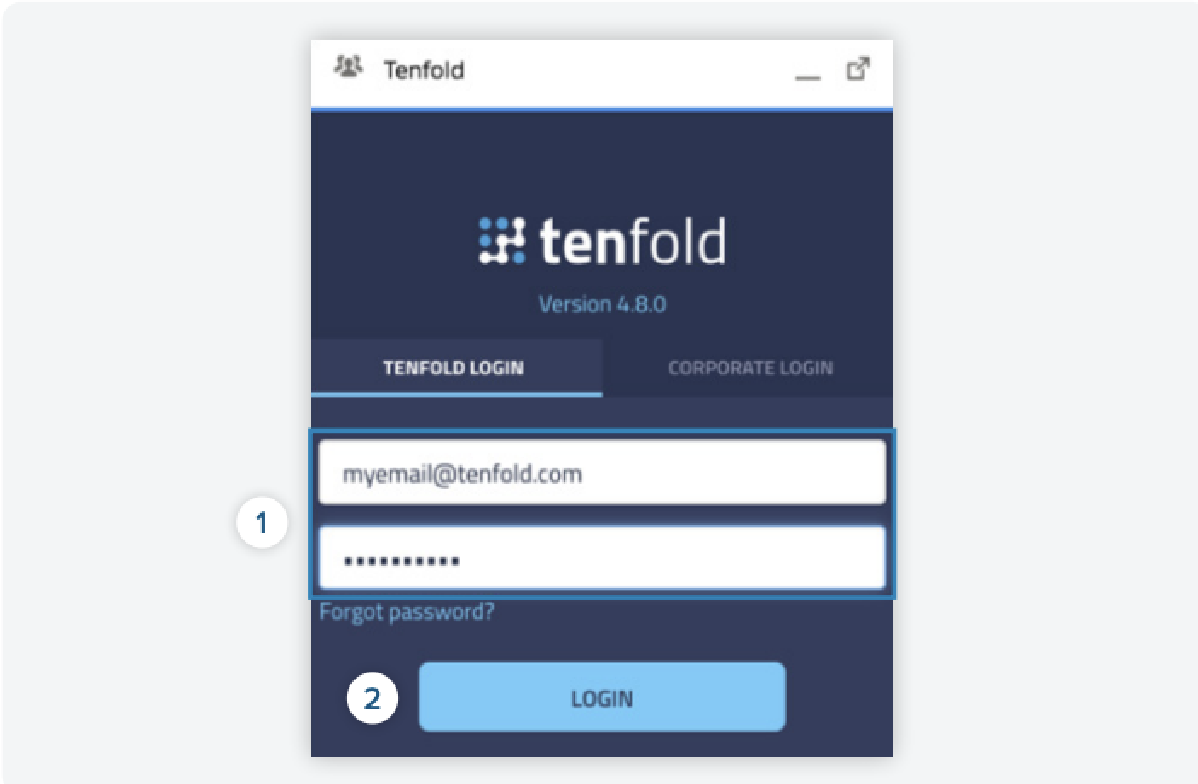
Login

Creating Your Tenfold Account



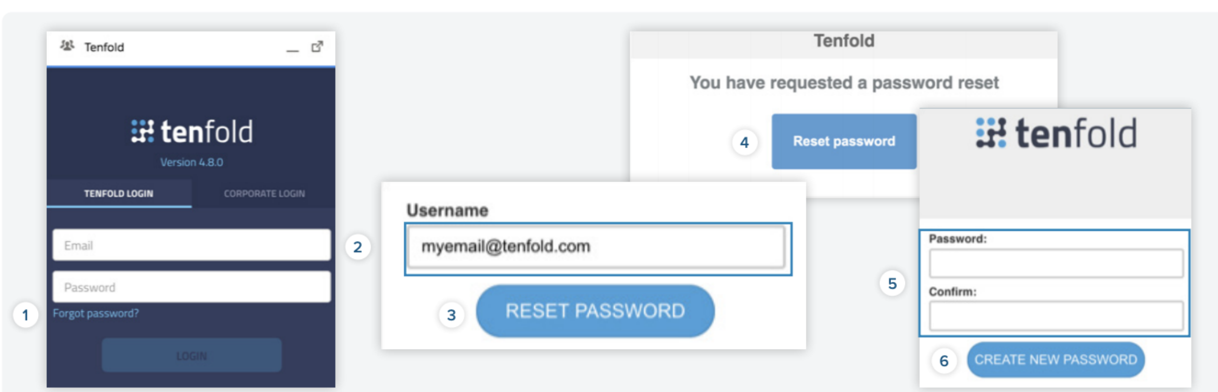
Once your admin has invited you to use Tenfold, you will receive an email. By clicking in the link in your email invitation, you will be prompted to create a Tenfold password. Depending on your organization's application deployment process, you may already have the desktop application or you may need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

Logging in to Tenfold



Logging in to the dashboard will keep you logged in to the Tenfold desktop application. If you find that you are no longer logged in, you can either log in to the Tenfold dashboard or log in to the Tenfold desktop application directly.

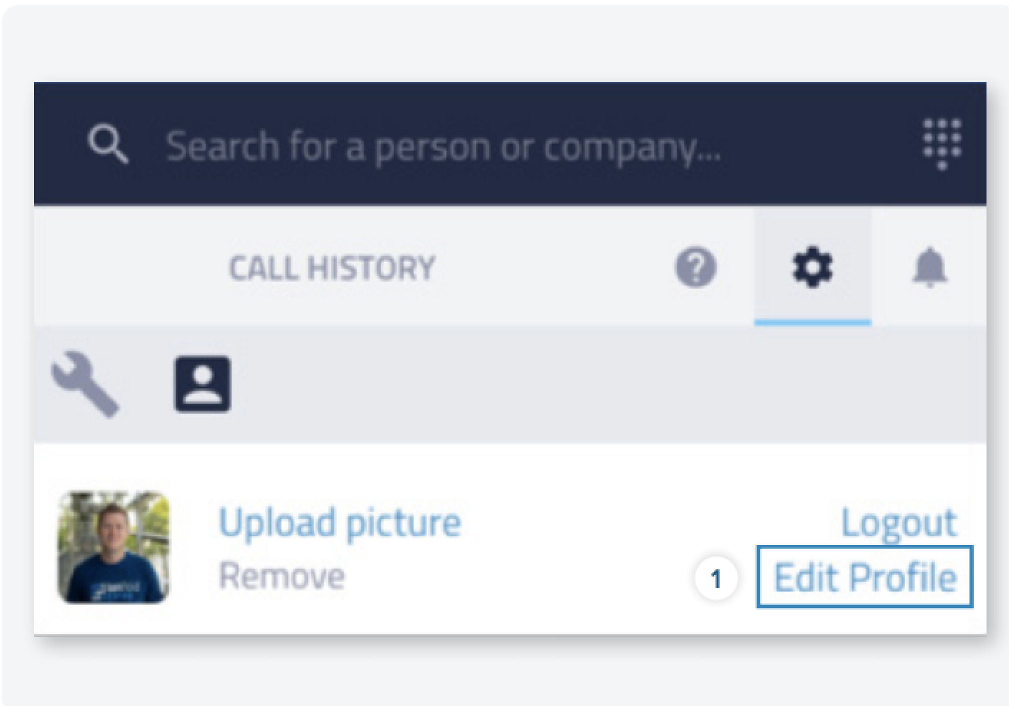
Reset Your Password



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.

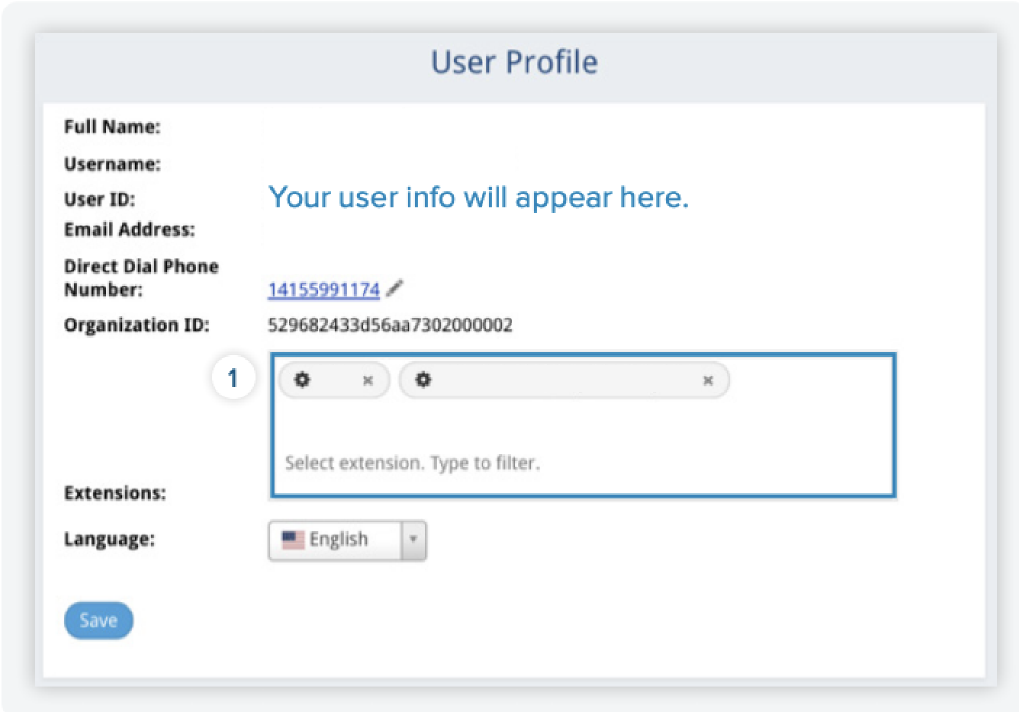
Once received, click **Reset password** and enter a new password on the next screen to confirm the reset.

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**.

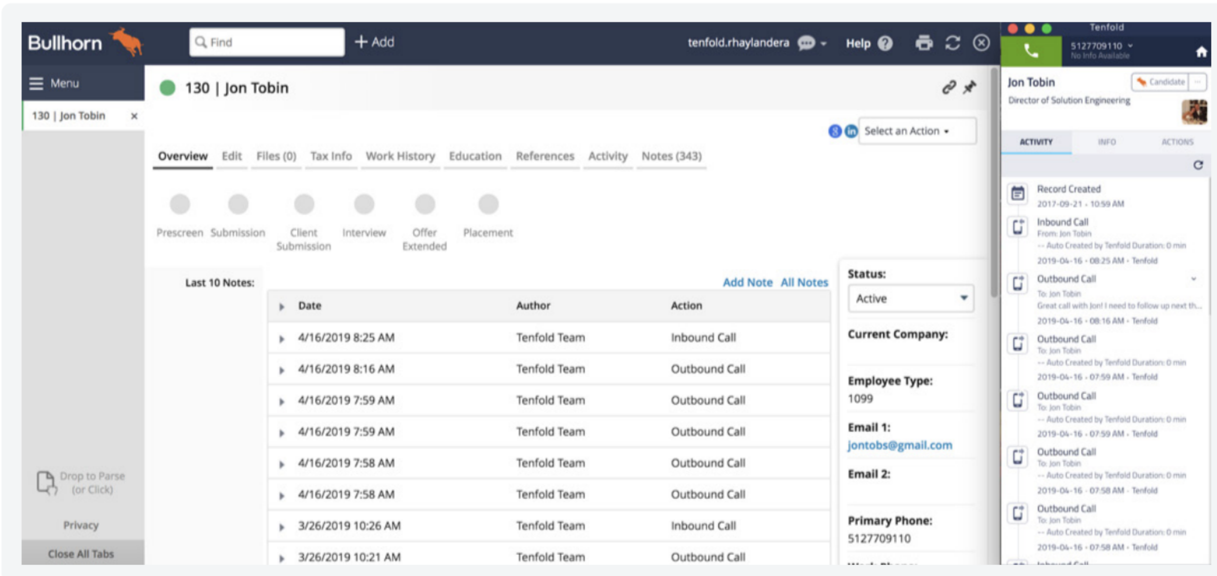
1. Click to view or edit profile



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.

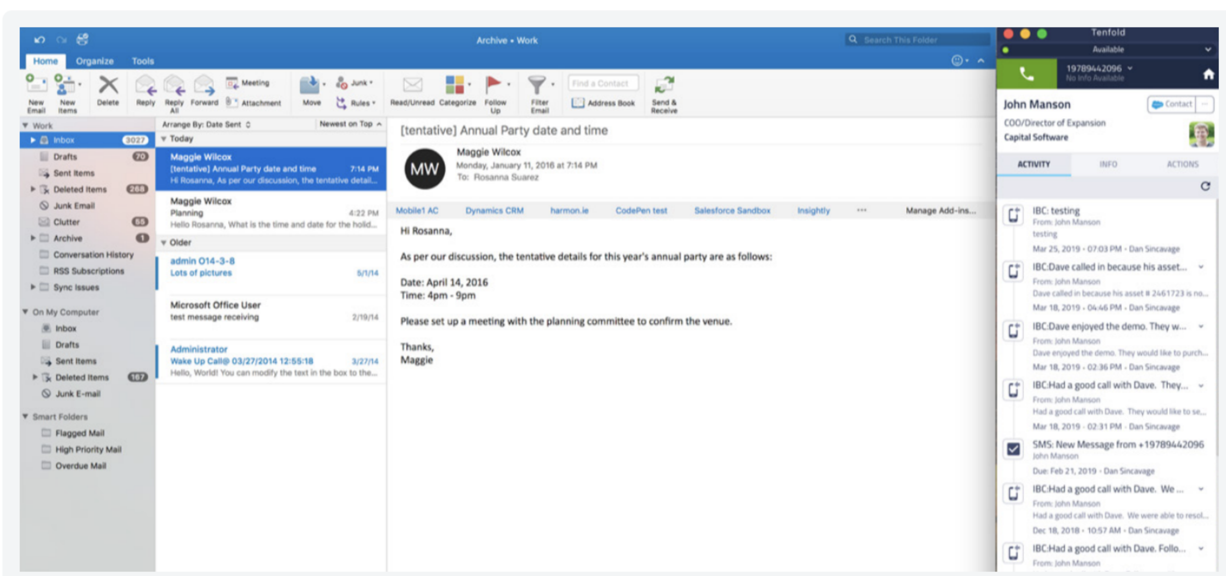
Tenfold UI Options

Tenfold Desktop App for Bullhorn



The Tenfold Desktop App UI for Bullhorn lives as a separate app from your browser or from the Bullhorn window. This allows you to interact with Bullhorn 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.

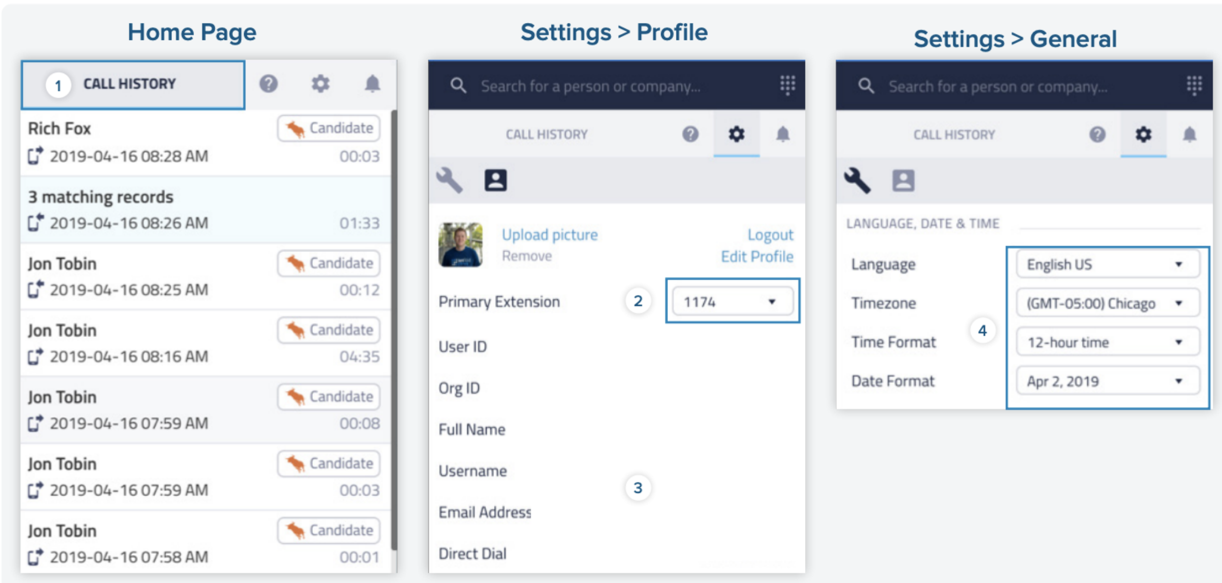
Note: You can also download the Tenfold Chrome extension to perform the same features



This allows you to have access to see, interact with, and update Bullhorn, even when you're in applications like Outlook.

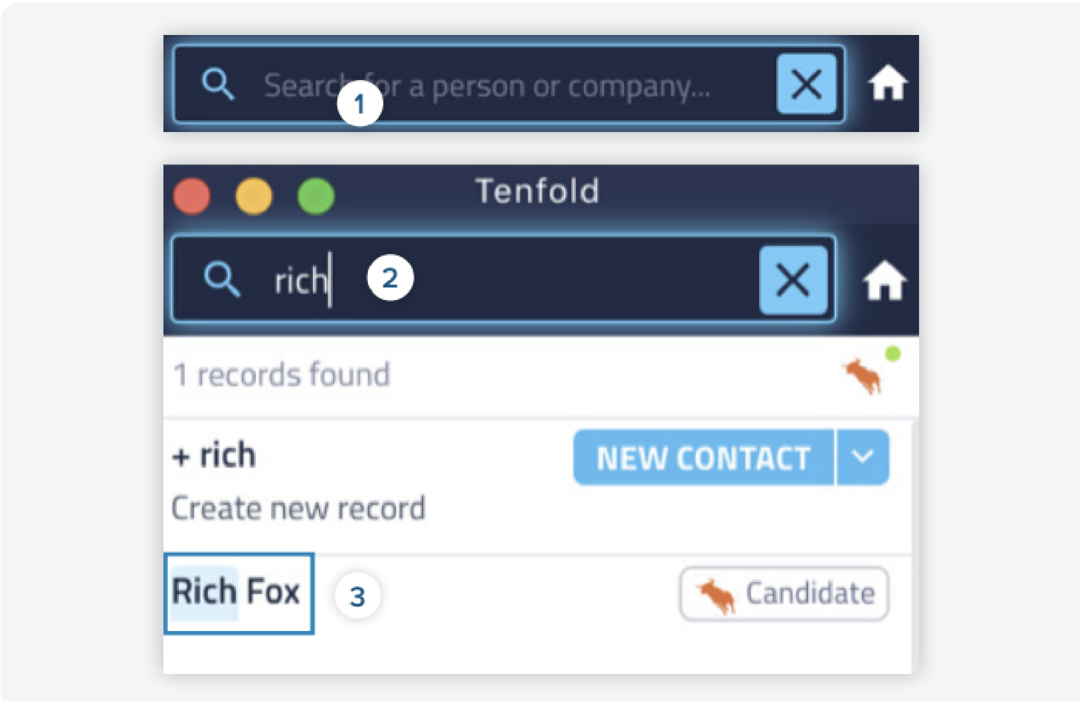
Tenfold UI Basics

Home Page and App Settings

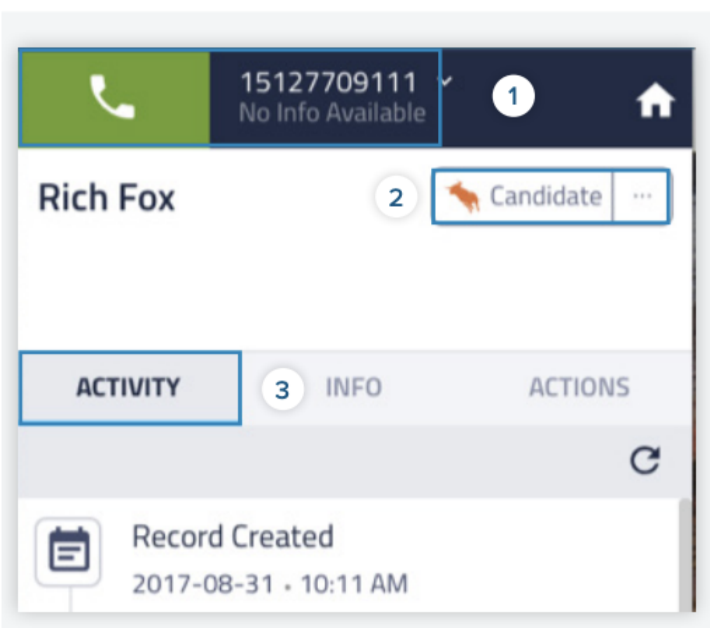


1. Call History displays your last 20 calls—click the Bullhorn icon to access the record or the name to access the call in Tenfold.
2. Update your primary extension (click-to-dial extension).
3. Your user info will appear here.
4. Manage language and time/date settings.

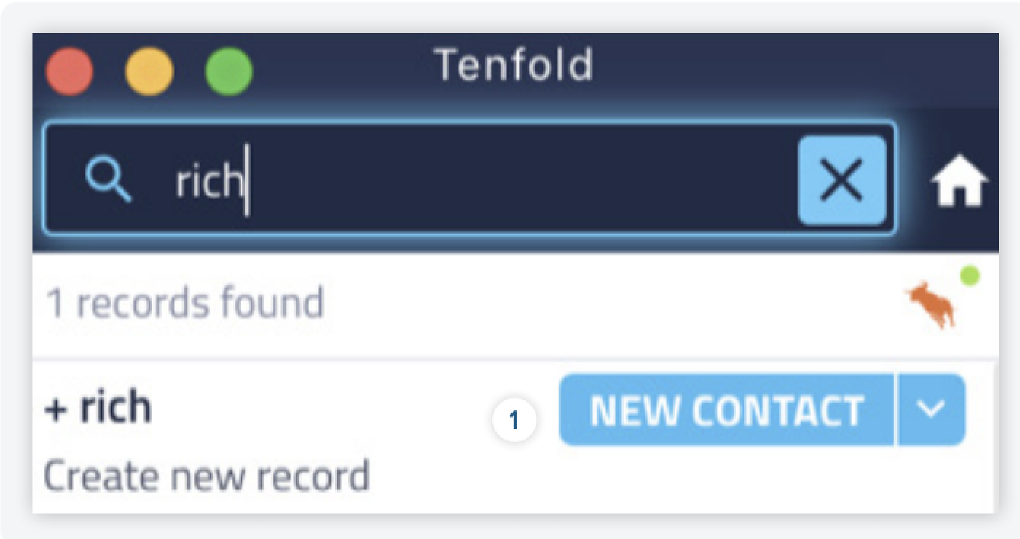
Search for Records or Create a New Record*



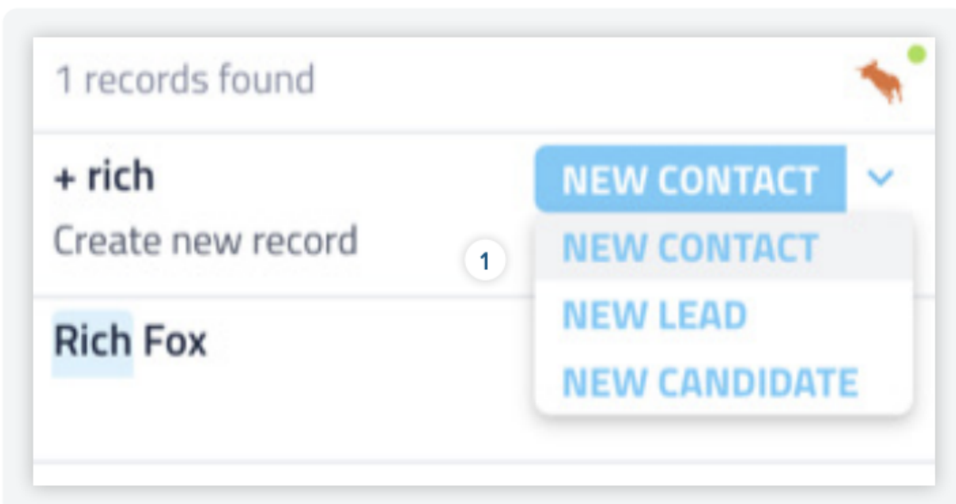
1. Click on the text entry search bar.
2. Enter the name of a person or company.
3. Click on the record to view in Tenfold.



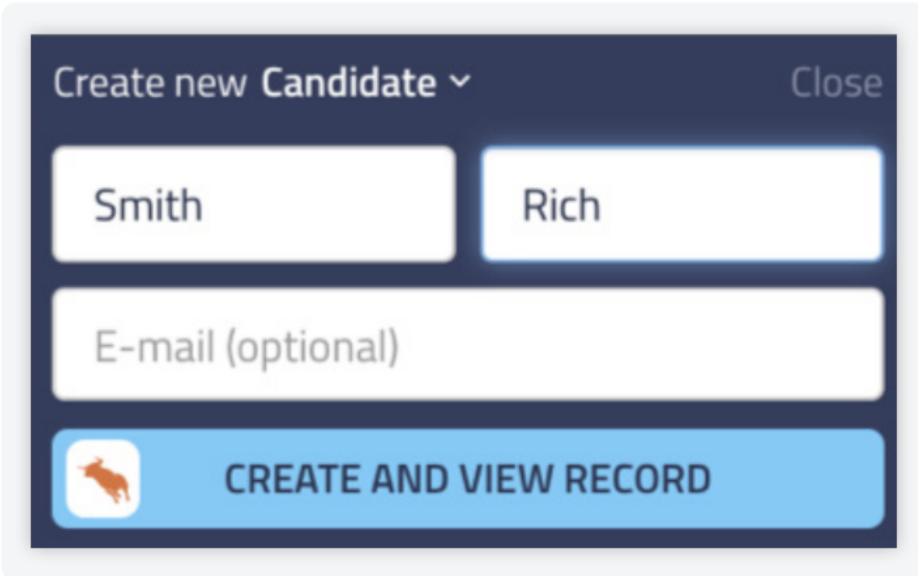
4. View the record in Tenfold.
    a. Select the phone number and perform the call.
    b. Open the record in Bullhorn.
    c. View the complete activity history from Bullhorn.



5. Click on the new record button to create a new record.
    a. Click to view available record types for creation.



6. Choose the type of record you would like to create.
    a. Select the record type to be created.

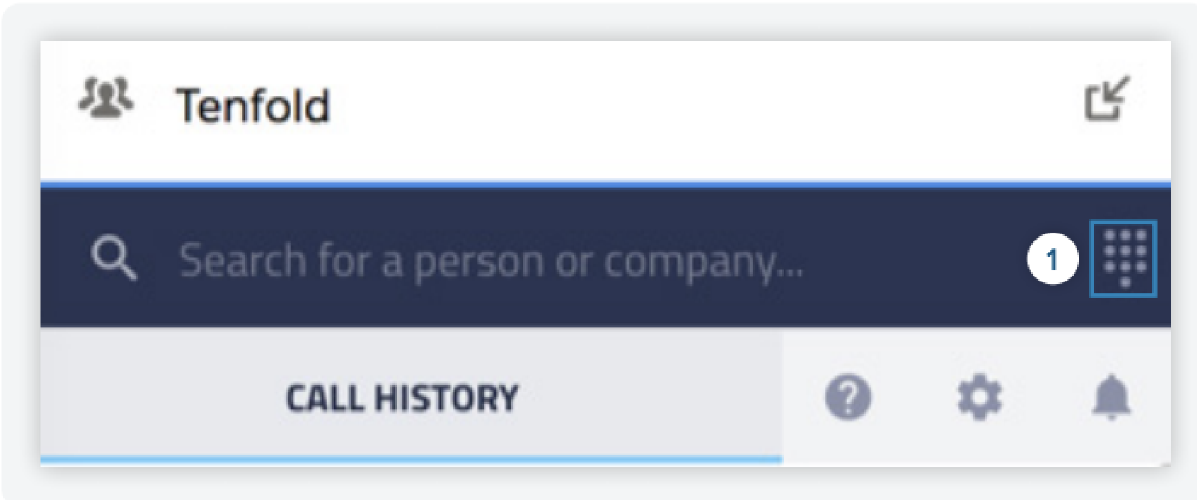


7. Enter the email (optional) and click **Create and View Record.**
    a. Click to create a new record.

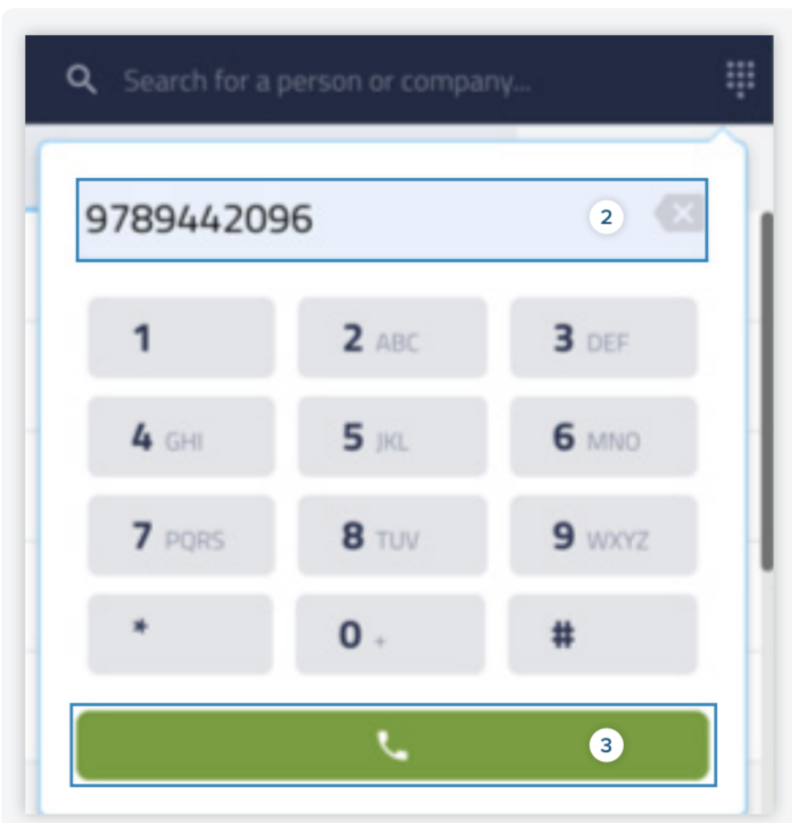
8. The record will be automatically created and displayed in Tenfold.

Placing Calls

Placing Calls with the Tenfold Dial Pad



1. From the home page, click on the dial pad icon.

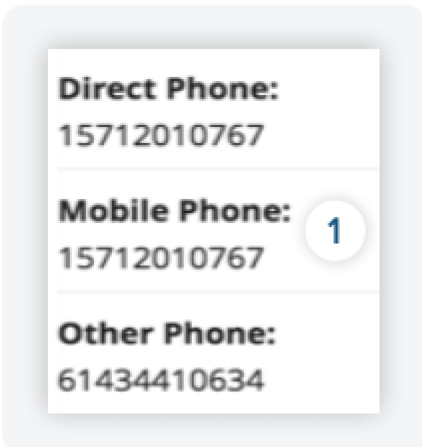


2. Type in the phone number or enter using the key pad.

3. Click the green dial icon or press enter to initiate a call.
4. A call will initiate and Tenfold will show a success message.

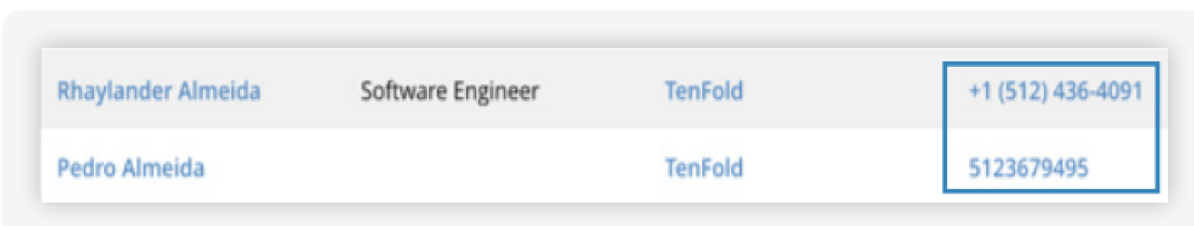
Placing Calls with Click-to-Dial

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.

1. Click a number to dial out.



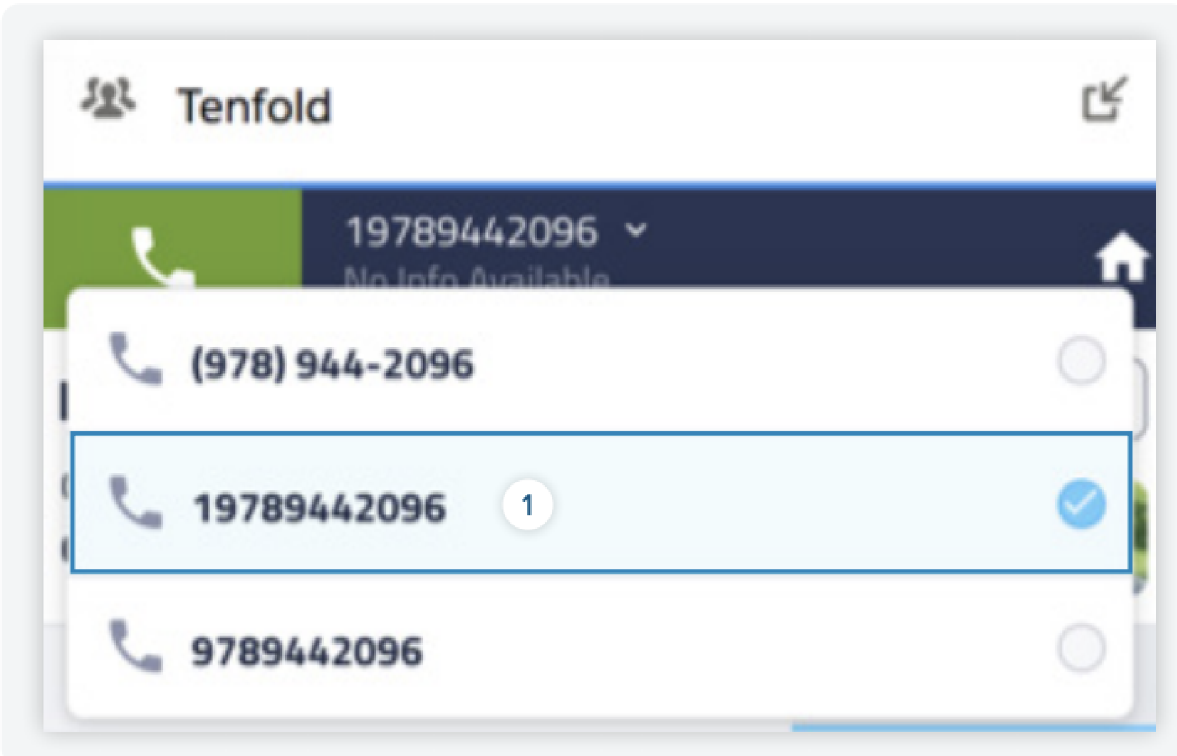
Click-to-dial also works in Bullhorn list views.

A link to download the CTD Chrome extension can be found in **Settings** > **General Settings tab** on the desktop app

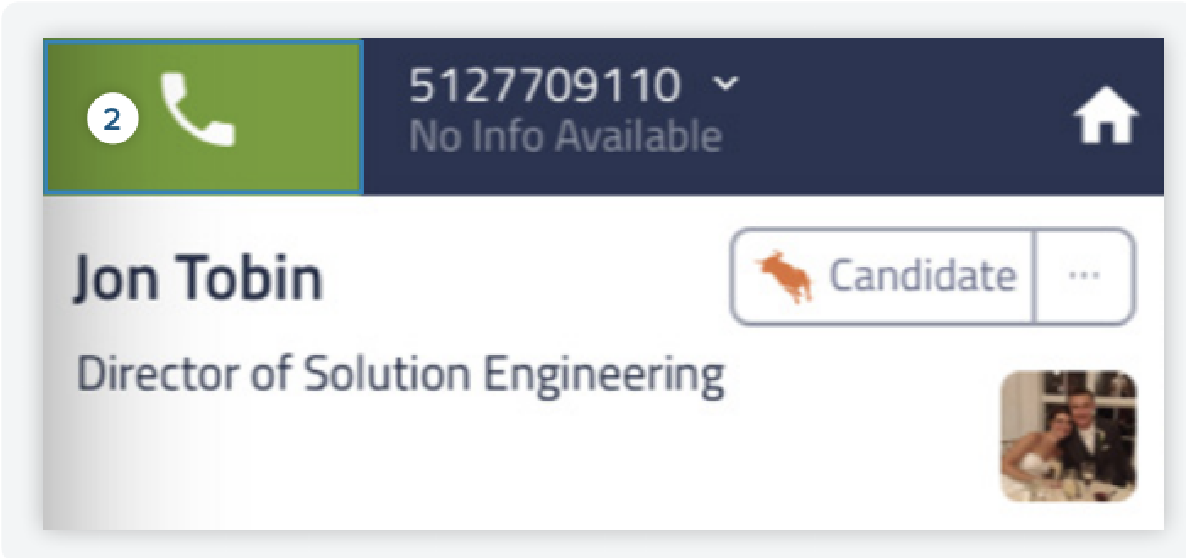
Incoming Calls

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.



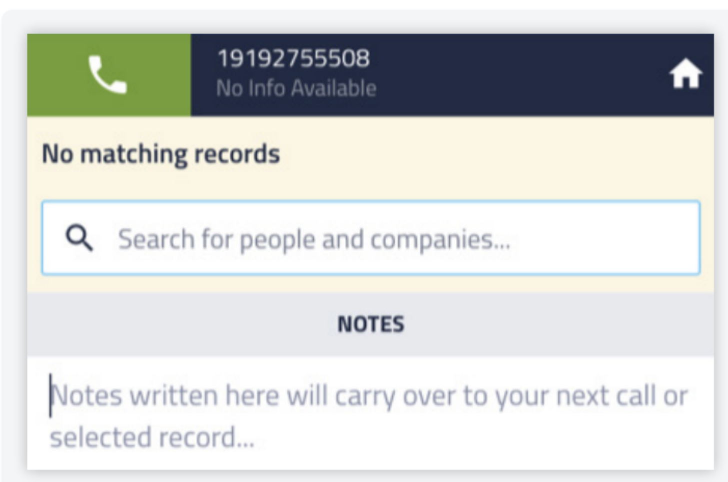
1. Select the phone number to dial out.

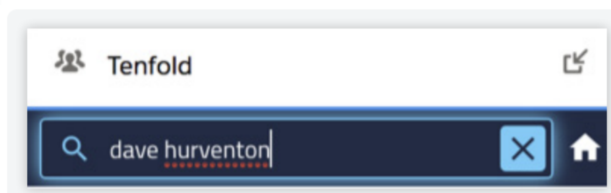


2. Click on the green phone icon to initiate a call.

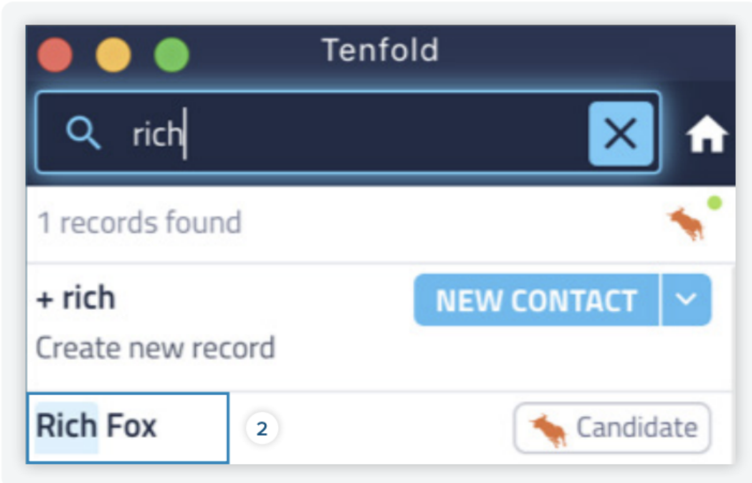
No Match Found View

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

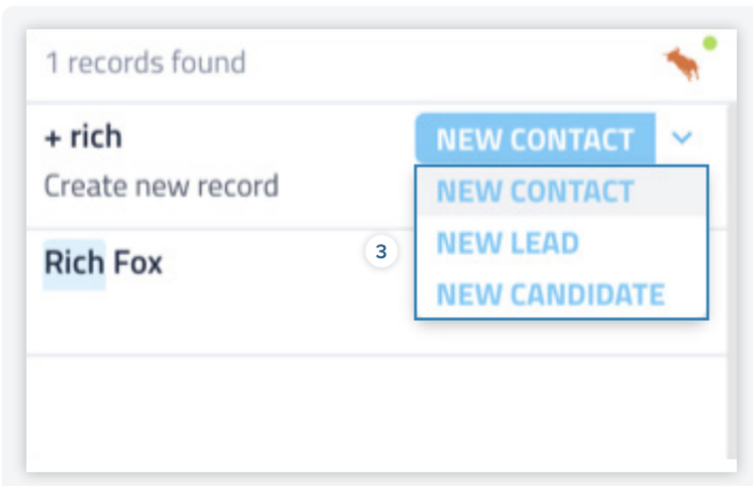




1. You can start typing notes that will be carried over once a record has been selected. To select a record, begin typing in a name.



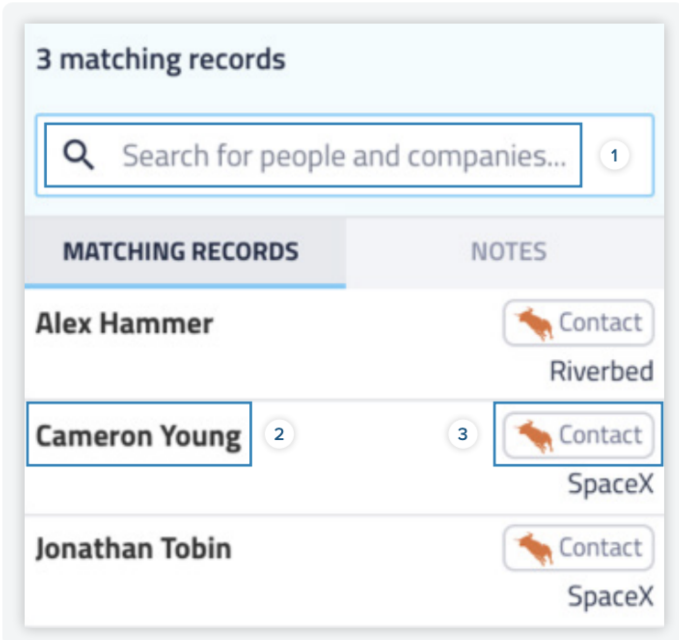
2. And select a record from the drop-down menu if it exists



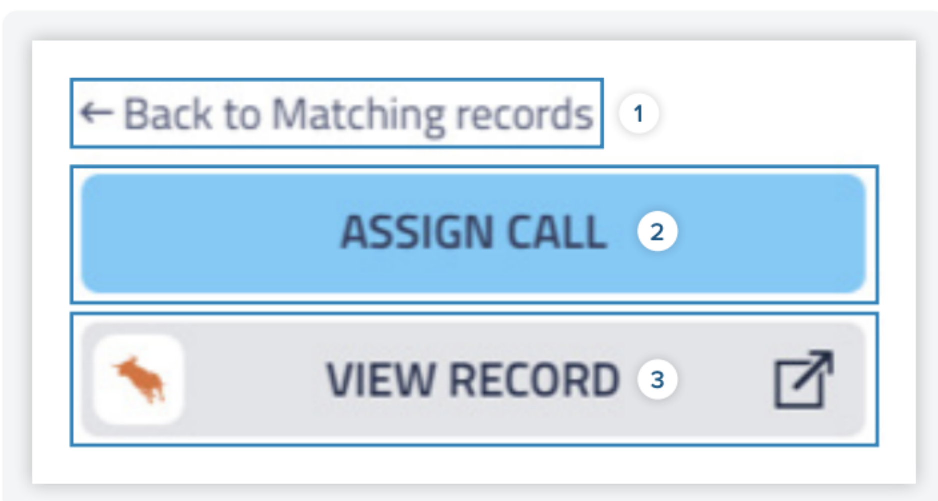
3. Or click to create a new record from the Tenfold UI.

Multiple Match View

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



1. Review the records.
    a. Search for other records in Bullhorn to assign a call to.
    b. Click to select the record from the list.
    c. Click to view the record in Bullhorn.



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.
3. If you selected the wrong record or need further verification, you can either click **View Record** to open the record in Bullhorn or **Back to Matching records** to return to the list
    a. Return to multi-match list view.
    b. Assign a call to the selected record and add a number
    c. Click to view the record in Bullhorn.

Recap of Call Scenarios in Tenfold

Tenfold's UI solves for the three main scenarios for inbound/outbound calls:

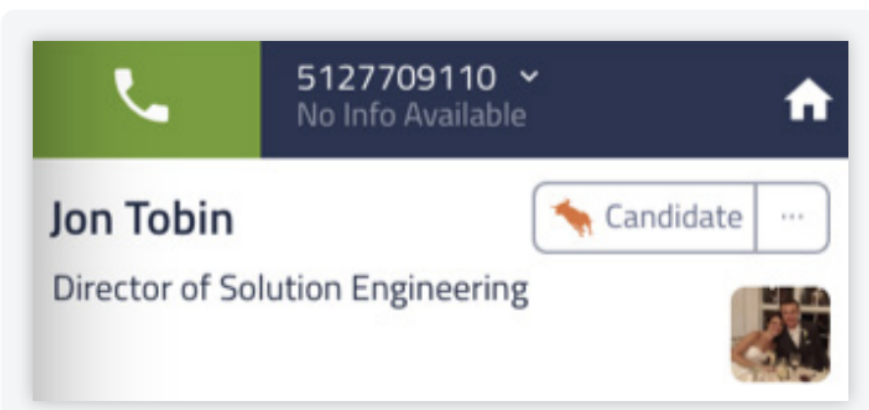
1. Presented when only one match is found or you resolve down to one record in No Match or Multiple Match.
2. Presented when multiple matches are found, allowing you to select, search for, and relate or create a new record.
3. Presented when no match is found, allowing you to search for and relate or create a new record.

Managing Calls with Tenfold

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 two primary sections:

1. Active Call Display
2. Workflow tabs

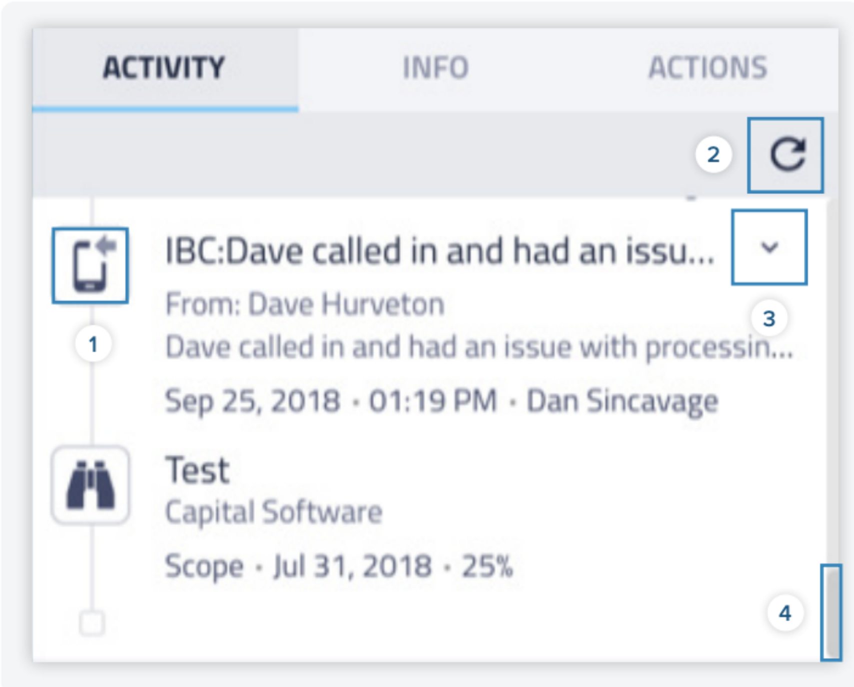


Active Call Display

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, a job title from LinkedIn, location, line type, carrier, and other third-party data that gives context about a caller to better service their needs.

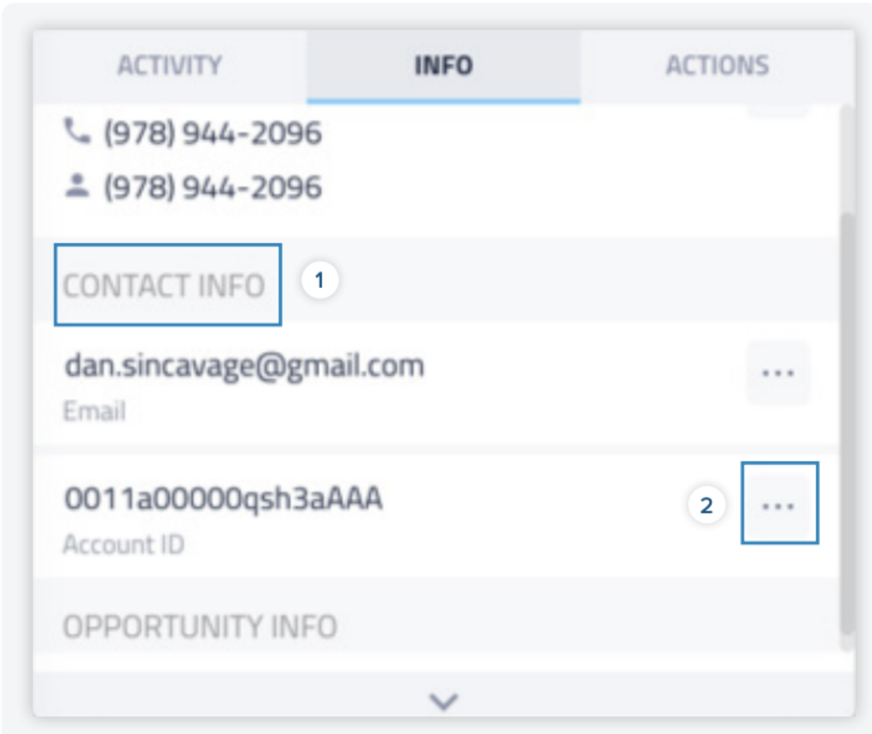
Workflow Tabs

Tenfold's UI consists of three distinct workflow tabs. These tabs are the Activity tab, the Info tab and the Actions tab.

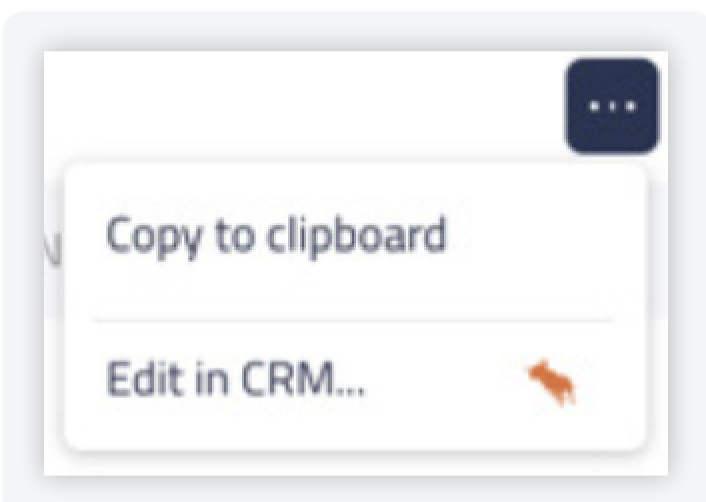


Activity tab: The Activity tab provides context of the matched record. By default, it displays open activities and completed activities saved in the CRM in chronological order. The Activity tab will also include key events, such as "record created," "case opened," and more. Each activity and event has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

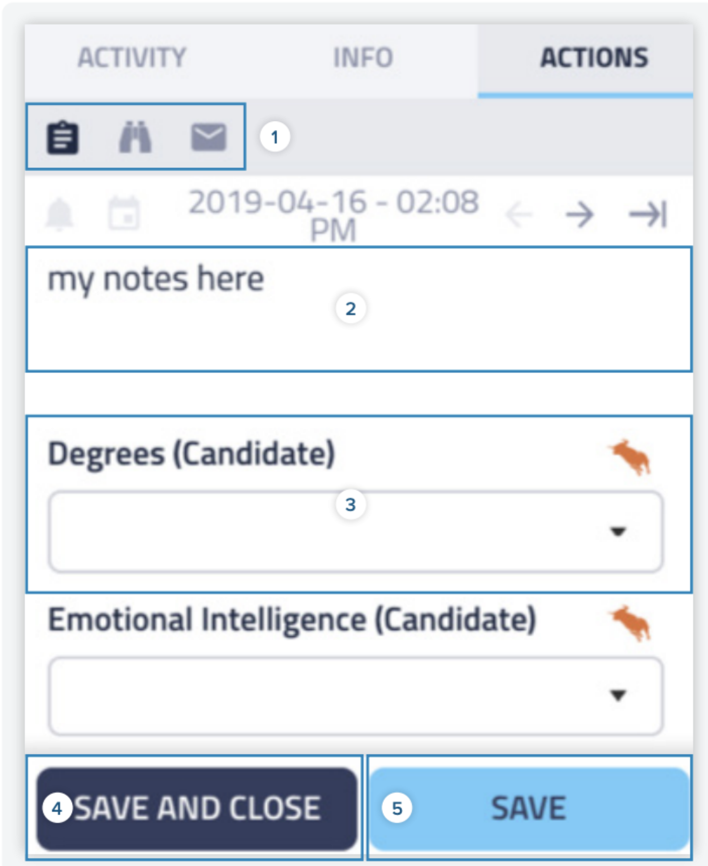
1. Clickable icon links to CRM.
2. Refresh activity list in real time.
3. Click to expand task details.
4. Scroll the bar for activity list.



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.



1. Display key fields and values.
2. Click the quick action menu to edit or copy fields.

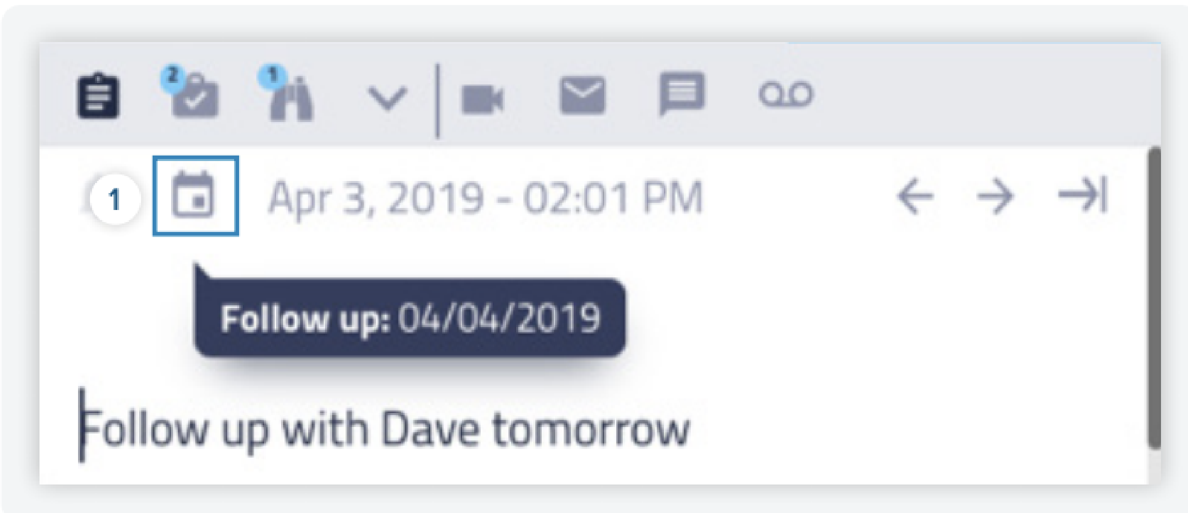


Actions tab: The Actions tab is meant for just that—taking action. The Actions tab provides a long list of functionality and can be highly tailored to meet the unique needs of you and your team's workflow. On the Actions tab, you can:

- 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).

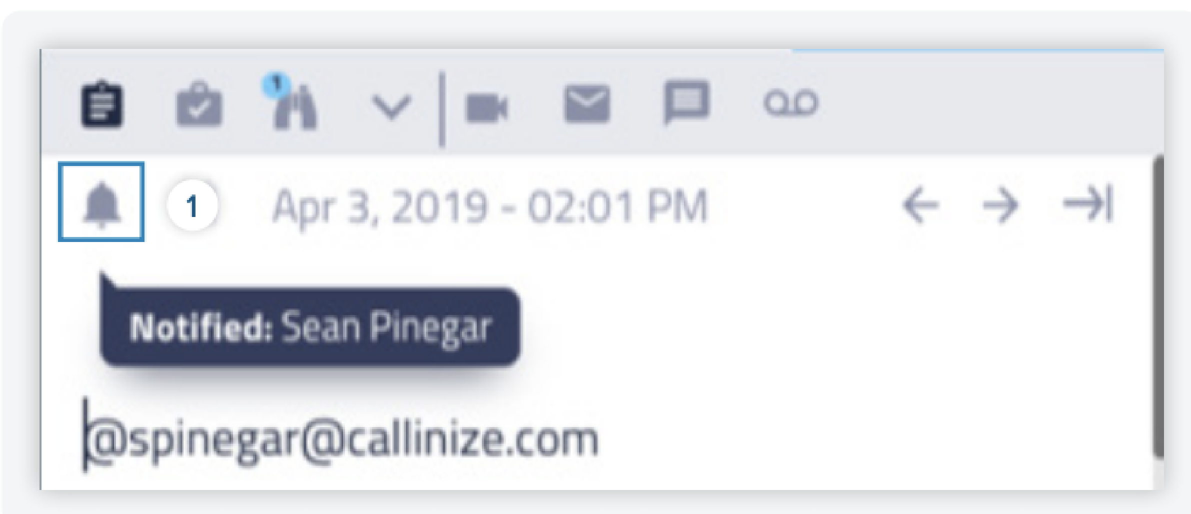
1. Open other action tabs.
2. Take notes for a call to sync back to the CRM.
3. Update field values on a call.
4. Save and keep a record open.
5. Save and exit out of a current call record.

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



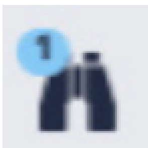
Action phrases: “Call”, “Follow Up”, “FU”, “CB”, “Task”, “Remind me to call”, “Remind”, “Remind me”, “Retry”, “Try again”

1. The calendar icon indicates a task is being created.



Dates: Days of the week, “morning”, “afternoon”, “in a week”, “in x weeks”, “next month”, “in two months”, and specific dates

1. Easily share notes with colleagues using @mention in your notes.



Creating new opps/cases: Clicking the Create New Opportunity/Case button will launch you into your standard creation flow in Bullhorn, opening up the new opp/case for you to edit with pre-filled info.

1. Refresh list.
2. Relate a call to opp/case.
3. Open opp/case detail view.
4. View opp/case details.
5. Click to create a new opp/case in Bullhorn.

Call Logging

Data Captured When Logging Calls

Capturing calls in Bullhorn is a key capability of Tenfold. Tenfold is uniquely able to log all calls, even when a user is not logged in to the CRM, making sure you get credit for all activities, and the business has visibility into all calls that are made.
There are three 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 the call was made to
- Related record
- Inbound number dialed or VDN/Skill

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 third-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)*

Call Data in Bullhorn

Calls are captured in Bullhorn as either Calls (completed activities) or Notes depending on your configuration. Here's a breakdown on fields for these objects.

For Calls:

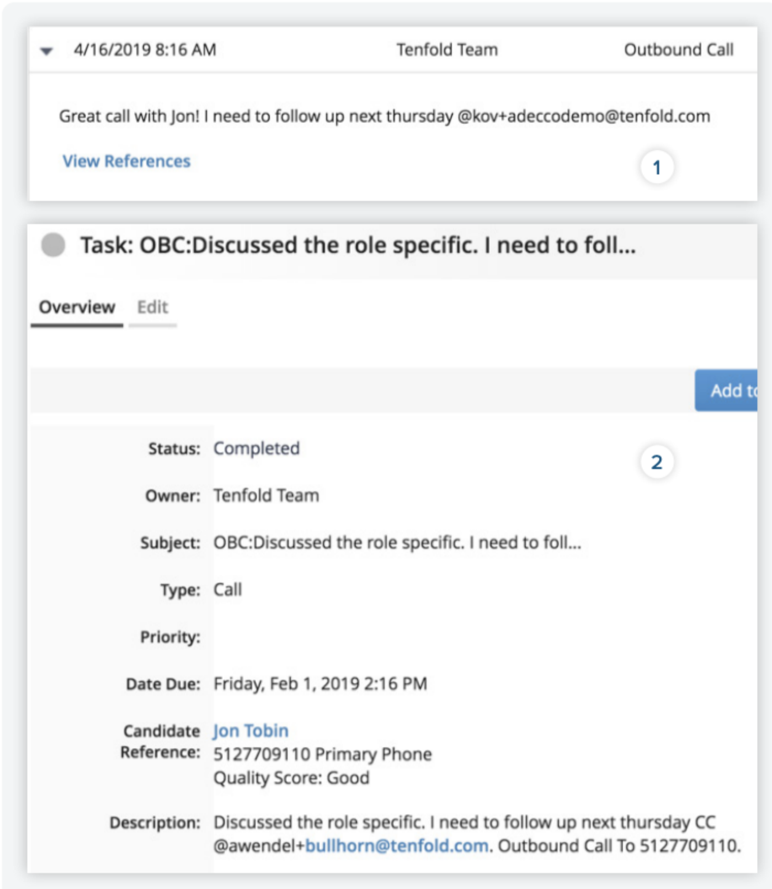
Bullhorn Field	Tenfold Data
Contact/Candidate	Matched record
Owner	User making/receiving the call
Description	Notes + call data (i.e., phone number, duration)
Date Due	Date/time of call
Subject	IBC:/OBC: + "<Notes up to char limit>…"
References	Other relevant data points from call
Date Added	Date/time that call was logged in Bullhorn

For Notes:

Bullhorn Field	Tenfold Default Value
Type	Outbound call or inbound call
Subject	IBC:/OBC: + "<Notes up to char limit>…"
Description	Notes
Date Added	Date/time that call was logged in Bullhorn
Owner	User making/receiving the call

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

Example Call Log from Bullhorn



1. Logging calls as Notes.
2. Logging calls as Activities.

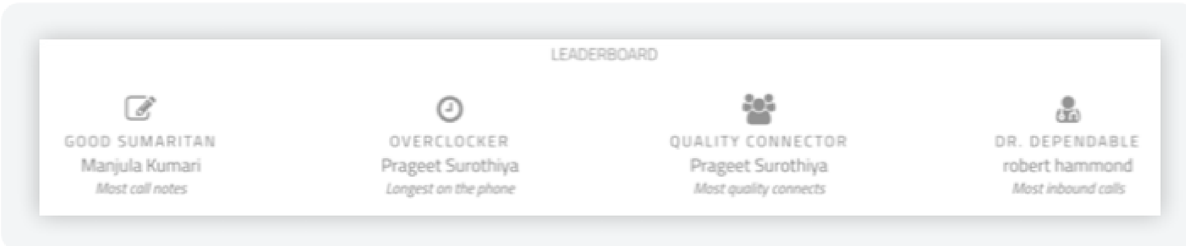
Tenfold Analytics

Tenfold Analytics Visibility and 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 at your organization or gather information on how individual teams or users are performing. You can also configure the date range.

1. Select the view.
2. Select the date range.
3. Preset the date ranges

Tenfold Analytics Overview

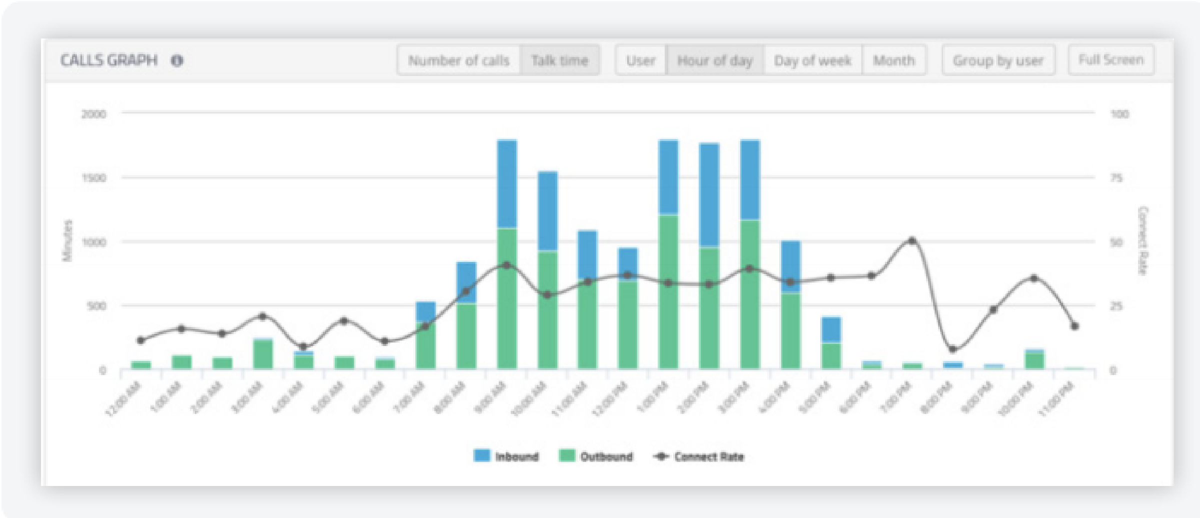


The Tenfold Analytics dashboard provides several components. This section provides an overview of these items.

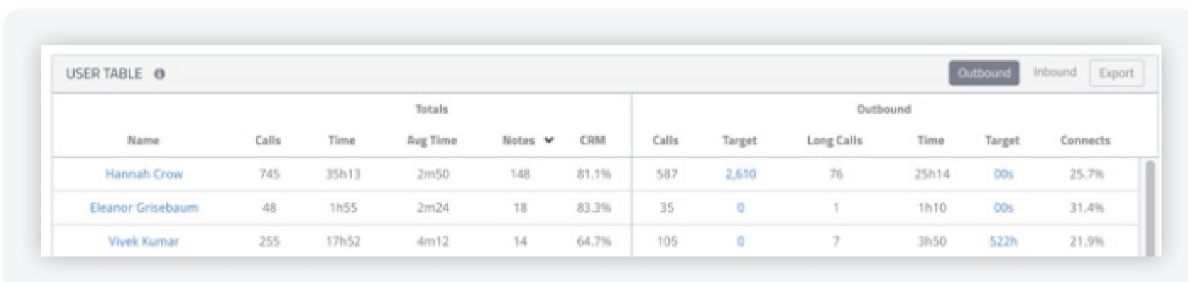
Tenfold Leaderboard: The leaderboard calls out top performers for your organization in a few categories as outlined below:
The leaderboard categories are subject to change but currently include the following:

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

Call 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.



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


USER TABLE

Outbound Inbound Export

	Totals					Outbound					
Name	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%

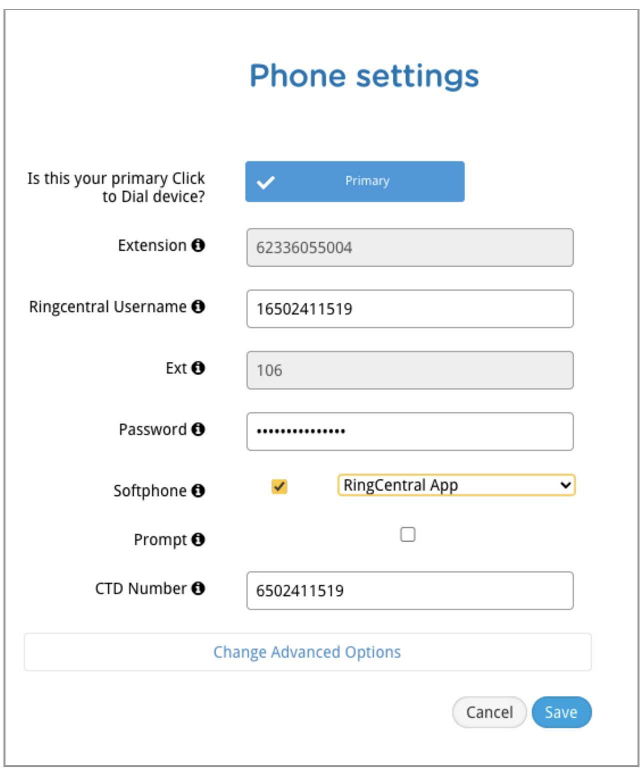
User Table: This table gives call statistic summaries for each user tracked during the selected timeframe. Clicking on a username will provide you with a detailed list of the user's calls. Statistics can be filtered further by inbound or outbound calls. Note that the thresholds for "Long Calls" and "Connects" are set by your admin in the company settings.

Using Tenfold with RingCentral

Note: For the following features, users need to install the [RingCentral app](). For call logging and notes, users need to install the [Tenfold Chrome extension]()

1. **Call Controls** give users the option of managing controls such as Answer, Mute, Keypad, Hold, Record, Transfer, Hangup and more directly from within the RingCentral app. Some call controls are also available on the Tenfold UI for easy access.
2. **Inbound Calling** automatically captures inbound calls in CRM whether or not a user interacts with the Tenfold UI or the RingCentral app.
3. **Outbound Calling** allows users to place a call through the RingCentral 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.
4. **Softphone selection** allows users to select a default calling app for outbound and inbound calls. Make sure to select the softphone checkbox and select RingCentral app and click Save to confirm the change.

   Note: If you have a physical desk phone or another primary device other than your RingCentral app, please disable the Softphone checkbox and click Save.



Powered by tenfold

RingCentral for Bullhorn FAQs

What do I need to download to use this integration?

Download the Tenfold Desktop App and the minimal Chrome extension (links below). This combination offers the best user experience and access to all features.

Desktop app:

- For PC
- For Mac

Chrome extension: Tenfold Chrome extension

Other download options for Tenfold can be found in this page

What do I do when click-to-dial is not working?

- Click-to-dial could be failing due to one or more of the following reasons:
- You do not have the Chrome extension installed, or there are too many other Chrome extensions installed in your browser. Please try creating a different browser profile.
- You are logged out of your RingCentral account. Please try reconnecting the phone system in your Tenfold dashboard or contact your company admin if you are unable to access it.
- You did not include a click-to-dial number as part of your Tenfold profile.
    a. **For Credentials form of authentication:** Navigate to the Tenfold dashboard portal and select **Profile**. Click the gear icon next to the extension and input your **CTD** number as your RingCentral phone number
    b. **For OAuth form of authentication:** Navigate to your Tenfold dashboard portal and select **Profile**. Scroll down to the bottom of the page and click **Connect to RingCentral Office**. Even if the status shows **Connected**, click on the green button to reconnect to your RingCentral account.

What do I do when the Tenfold app does not detect my inbound or outbound calls but my RingCentral Phone app is ringing?

Verify if you installed the Chrome extension and try reconnecting the phone system within your Tenfold dashboard again as you might be logged out of your RingCentral account. Or contact your company admin for the reconnection

How good is natural language processing with human error?

Currently, the NLP will not pick up errors. So if you misspell Wednesday, it would not create a task. It does pick up "wed", so abbreviations work. The calendar icon will turn dark grey if a task is identified from the text.

How do I customize dispositions?

If you are provisioned “user access” to the integration, please contact your company admin to configure the dispositions you would like reflected in the Tenfold Desktop App

Support

For more help, visit support.ringcentral.com or call 1 (888) 528-7464.