TELUS Business Connect 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 TELUS Business Connect 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/TELUS Business Connect integration. This document is NOT intended as a specific system or network design document. If further clarification is needed, please visit our support page at http://telus.com/BusinessConnect/LearningCentreHome.

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.**

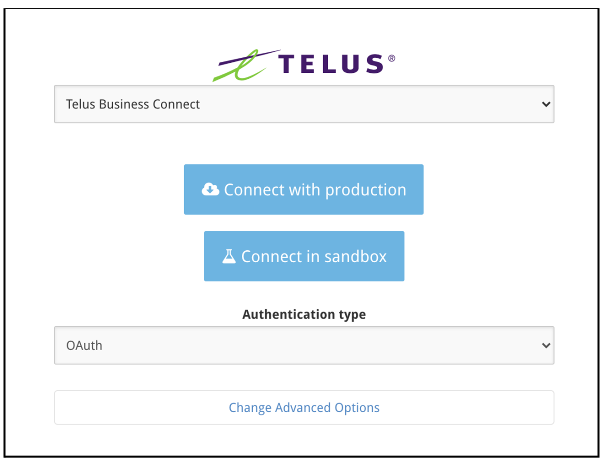
4. Make sure **TELUS Business Connect** is selected from the drop-down menu.

5. Enter the relevant TELUS Business Connect credentials for the BU's API user:

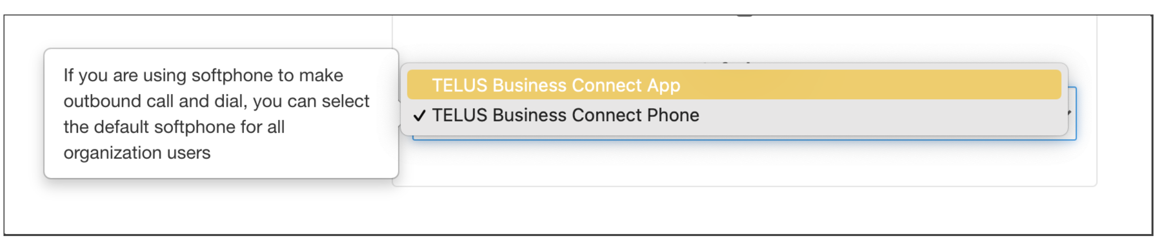
    – Username

    – Password

    – Admin or Super-Admin Extension



You can also select the default calling app/softphone for your org by **Change Advanced Options** -> **Softphone**



6. Select the **Company Settings** link in the top navigation.

7. In the sub-navigation, select **CRM**.

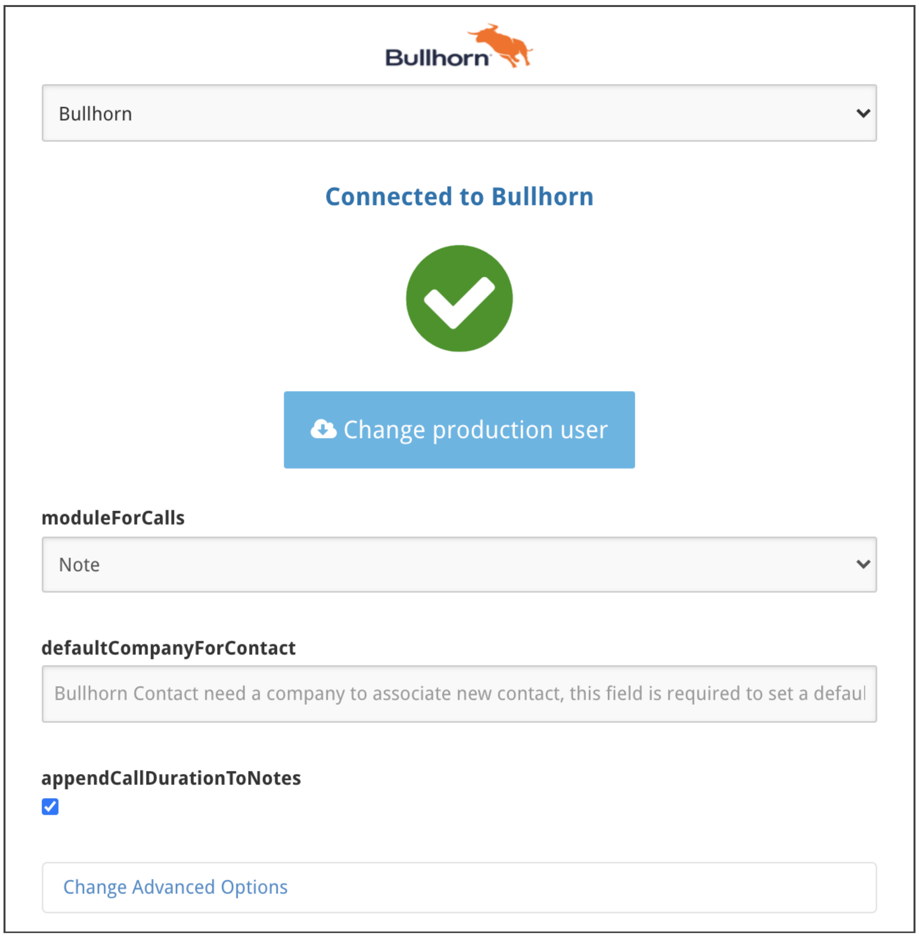
8. Select Bullhorn as your **CRM**.

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

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

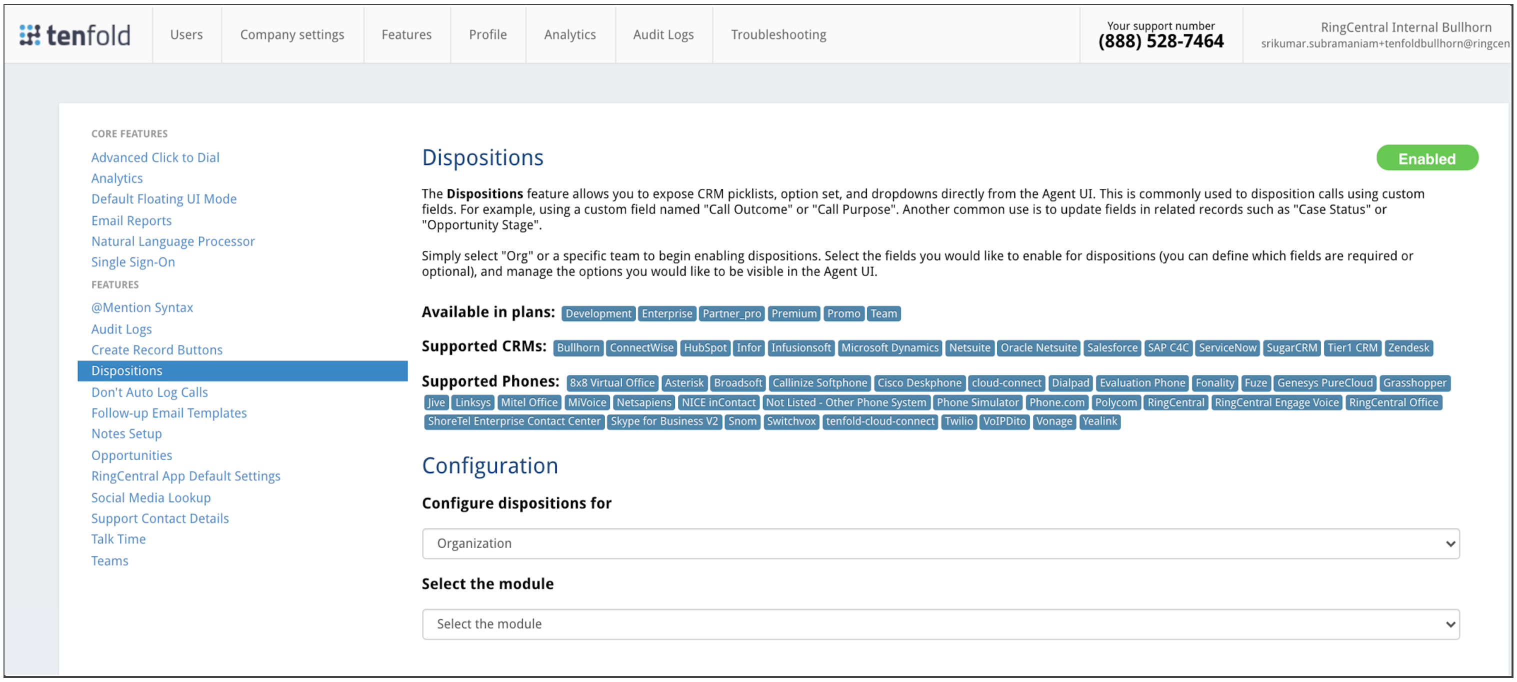
11. Check **Append call duration** to notes to add call duration to the end of any notes taken by users.

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 TELUS Business Connect

Note: For the following calling features, users need to install the TELUS Business Connect softphone app (For Mac and For PC) or TELUS Business Connect Unified app. For call logging and notes, users need to install the Tenfold Chrome extension

Call Controls give users the option of managing controls such as Answer, Mute, Keypad, Hold, Record, Transfer, Hangup and more directly from within the TELUS Business Connect SoftPhone or BT Unified desktop app. Some call controls are also available on the Tenfold UI for easy access.

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

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

TELUS Business Connect for Bullhorn FAQs

What do I need to download to use this integration?

Users need to install the TELUS Business Connect softphone app (For Mac and For PC) or TELUS Business Connect Unified app. For call logging and notes, users need to install the Tenfold Chrome extension

Do I need the TELUS Business Connect for Google Chrome extensions to use this integration?

No. If you have the Tenfold Chrome extension installed, you should be able to do a successful click-to-dial.

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:
1. 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.
2. You are logged out of your TELUS Business Connect account. Please try reconnecting the phone system in your Tenfold dashboard or contact your company admin if you are unable to access it.
3. You did not include a click-to-dial number as part of your Tenfold profile. Navigate to the Tenfold dashboard portal and select Profile. Click the gear icon next to the extension and input your CTD number as your TELUS Business Connect phone number.

What do I do when Tenfold does not detect my inbound or outbound calls but my TELUS Business Connect 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 TELUS Business Connect account. Or contact your company admin for the reconnection.

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.

What do I do when I am facing permission issues like searching through contacts or email notifications for incoming calls?

TELUS Business Connect for NetSuite needs a role to be assigned to users using this integration. The issue could be due to the permissions related to that role. Please contact your company's NetSuite admin for more details.

Support: For more help, visit http://telus.com/BusinessConnect/LearningCentreHome.