Tenfold Administrator Guide v0.1

Last Updated on April 2nd, 2019

1. Introduction

1.1 Intended Audience

This Admin Guide is intended for Tenfold Super Administrator and Standard Administrator Users who will be involved in managing CRM/Phone System Integration Connectivity, Tenfold Solution Configuration and End User Management. This is meant to be a general Admin Guide and may not include information about organization-specific customizations or features released and improved since the latest update of this guide. If you are unable to find the information that you are looking for in this guide, please contact your tenfold customer success manager or our support team by reaching out to support@tenfold.com.

1.2 Format and What to Expect

This Admin Guide has been broken down into 7 key sections, each with several sub-sections to address specific topics of interest as follows:

Section 1: Introduction – Provides an overview of the audience for this Admin Guide and general advice on how to navigate within the admin guide to find relevant information.

Section 2: Getting Started with Tenfold – Provides an overview of setting up your Tenfold organization, establishing connectivity between Tenfold and your CRM/Phone System, general company settings and an overview of User Interface options for Tenfold.

Section 3: User Administration – Provides a guide for the set-up and on-going administration of Tenfold users in your organization.

Section 4: Configuration of Core Functionality – Provides an overview of and setup information for configuring core CTI functionality of Tenfold.

Section 5: Tenfold Analytics Settings – Provides an overview of the Tenfold analytics dashboard and best practices to use this for reporting and value realization.

Section 6: Support – Provides an overview of self-service troubleshooting options and best practices in engaging Tenfold for support across various channels.

This guide is meant to serve as a general overview and has not been tailored to your company. If you have customizations or questions about functionality that is not covered by this Admin Guide, contact your Customer Success Manager or our support team at support@tenfold.com.

2 Getting Started with Tenfold

2.1 Managing Your Company Settings

The Tenfold Dashboard allows you to manage several company settings by navigating to "Company Settings" > "Company". On this tab, you can manage the following settings:

Super Admin – Designates the primary admin for your Tenfold account.

Company Time-Zone – Designates the default time-zone for your company. This setting becomes the standard setting for your Tenfold Analytics view but can be easily adjusted for viewing data in different time-zones.

CRM Admin – This enables your team to designate a primary admin for any questions or issues related to CRM connectivity & integration settings for Tenfold.

PBX Admin – This enables your team to designate a primary admin for any questions or issues related to Phone System connectivity & integration settings for Tenfold.

Quality Connect Threshold – Designates the number of seconds required for a call to be deemed a "Quality Connect" in the analytics dashboard. This maps to the number of "Connects %" showing for each user in Tenfold Analytics.

Long Calls Threshold – Designates the number of seconds required for a call to be deemed a "Long Call" in the analytics dashboard. This maps to the number of "Long Calls" for each user in Tenfold Analytics.

Analytics Visibility – This allows you to set analytics visibility within your organization. You can restrict analytics visibility for standard Users to their own analytics or allow them to see all analytics for the organization.

2.2 Manage Your CRM Integration

The Tenfold Dashboard allows you to manage your CRM connection and integration settings by navigating to "Company Settings" > "CRM". On this tab, you can establish connectivity to your CRM either through O-auth or standard username/password authentication.

For specific CRM integration requirements please see these guides:

1) Bullhorn
2) Microsoft Dynamics
3) NetSuite
4) Salesforce
5) ServiceNow
6) SugarCRM

2.3 Manage Your Phone System Integration

The Tenfold Dashboard allows you to manage your Phone System connection and integration settings by navigating to "Company Settings" > "Phone System." On this tab, you can establish

connectivity to your Phone System or Contact Center solution. Instructions and options for your specific selected phone system will be displayed here.

2.4 Choosing the Right Tenfold User Interface (UI) for your Users

Tenfold offers several User Interface (UI) options to meet your unique security, deployment and workflow requirements. The UI can be standardized across your entire Tenfold organization or unique across various teams or users. All of Tenfold's UIs use the same configuration and connectivity on the backend allowing for the utmost flexibility in user experience. The current available Tenfold UI options are:

Tenfold Desktop Application – The Tenfold Desktop Application supports both Windows and Mac computers. It is installed as a .exe file on each device. The desktop app supports deployment via group policy settings and can be configured to either auto-update or allow for admin management of release access. Tenfold's desktop app provides users with the ability to leverage Tenfold alongside any other application including your CRM, Outlook, Slack or home-grown agent desktops. It does require internet connectivity to properly function but does not require an open browser window like the Chrome Extension and OpenCTI versions of Tenfold.
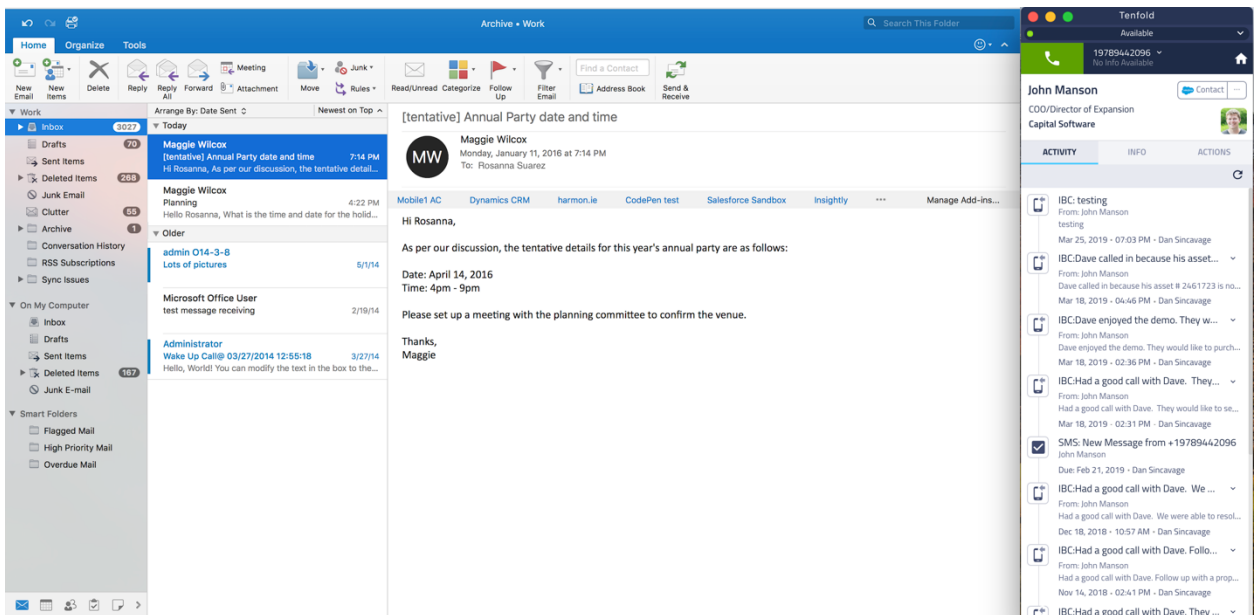
Tenfold Chrome Extension – The Tenfold Chrome Extension is a browser-based version of Tenfold only supported by Google Chrome. The Chrome Extension allows for users to leverage click to dial on any phone number on any page in Google Chrome. It also allows users to see information about incoming/outgoing calls on any Chrome tab, while maintaining the ability to capture calls and update notes, dispositions, follow up tasks, etc. without the need to be inside of the CRM.

Tenfold Embedded UI for Salesforce (OpenCTI) – The Tenfold Embedded UI for Salesforce is an OpenCTI-based version of Tenfold only supported for Salesforce users. Tenfold's OpenCTI application supports Classic, Lightning, Sales, Service and Console views. Tenfold's OpenCTI solution is built into the Salesforce interface either in the sidebar for Salesforce Classic or the Utility bar in Salesforce Lightning. This allows users to leverage Tenfold from within Salesforce and provides click to dial functionality for any phone number field in Salesforce.

2.5 General Application Settings

Users can manage some general settings on the application themselves. The following settings can be managed by Users within the application:

3 User Administration

3.1 Overview of Tenfold Roles & Governance Settings

Tenfold currently supports a 4-level role/governance structure that allows you to manage visibility and configuration of users, settings and analytics. Tenfold supports the following Roles:

Tenfold Super Admin – Only one user can be a Super Admin for each Tenfold organization. The Tenfold Super Admin User has all permissions assigned and is the only user who can update the assigned Super Admin.

Tenfold Standard Admin – A Tenfold Standard Admin User has all permissions assigned to the Tenfold Super Admin with the exception of updating the assigned Super Admin.

Tenfold Team Manager – A Tenfold Team Manager has standard settings for a Tenfold End User but can be provided with increased visibility to Tenfold analytics across the team(s) of users they manage.

Tenfold End User – A Tenfold End User can only see and update their own profile. Admins can determine whether Tenfold End Users have full visibility into analytics across the organization, team visibility or visibility to their own call data only.

3.2 Managing Tenfold Users

The Tenfold Dashboard allows Tenfold Super Admins or Tenfold Standard Admins to manage Tenfold Users from the "Users" tab. From this tab, users can be created, edited, deleted, invited, enabled/disabled, reset and assigned phone extensions.

Creating Users – Users can be created in one of three ways. Typically, users are automatically created by synchronizing Tenfold with your CRM. This can be done by following these steps:

1) Click on "Synchronize Users" in the dashboard on the top right corner of the Users Tab
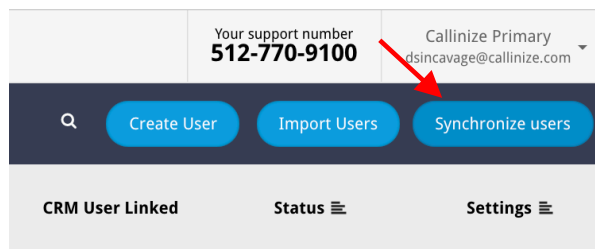
2) Click "OK" when prompted
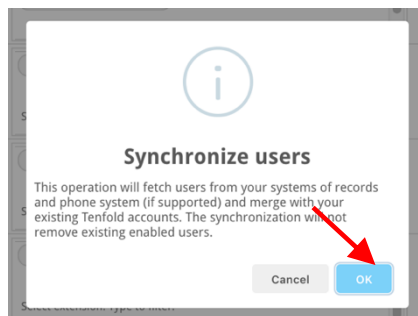
Users can also be created manually. Use this method when a user does not exist in your CRM but still needs access to Tenfold for screen-pops, administrator functions or viewing Tenfold's analytics.

Lastly, users can be automatically created by importing a .csv in the supported format.

1) Click on "Import Users" in the dashboard on the top right corner of the Users Tab
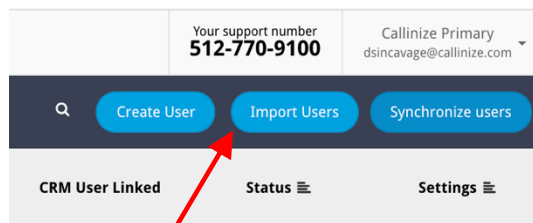
2) Format a .csv as outlined in the prompt, select it by clicking "Choose File" and then click "Upload" once the proper file is selected.

Editing Users – You may want to update a user's name or email address from time to time. You have the ability to do this by clicking on the icon (3 bars) in the settings column and selecting "Edit User." A window will pop up providing you with text-entry fields to update the user's email address or name.
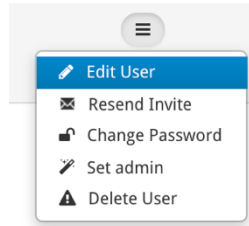
Edit User

Full Name

Marketing Tenfold

Email Address (username)

marketing@tenfold.com

Deleting Users – In the event that you would like to delete a user or users, you can do so in one of two ways. Disabled users that are no longer in your CRM will automatically be removed from Tenfold when you synchronize with your CRM. You may also delete users by clicking on the icon (3 bars) in the settings column and selecting "Delete User."
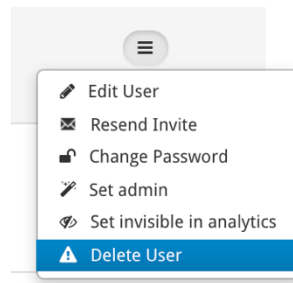

Inviting Users – When a user has not yet been added to Tenfold, you will see a blue-envelope icon in the "Status" column. If you are ready to invite a user so that they can create their Tenfold account, you can click on the blue-envelope icon. The user will receive an invite by email to set up their account with the Admin who invited them CC'd on the email invitation for follow up/clarification if needed.

Callinize Primary has invited you.

- Your calls are automatically logged for you.
- You'll always know who's calling.
- You can click to dial any number on any website.

Click the button below to setup your account.

Install

Welcome

Your Tenfold **username** is your email-address:

msharma@tenfold.com

Let's set your **password**:

Password:

Confirm:

SET PASSWORD

Enabling/Disabling Users – Users can be enabled or disabled from the Users tab by toggling the red "x" or green check mark icon in the "status" column. When hovering over the red "x" you will see help text reading "enable." Clicking the "x" will turn it into a green checkmark and the user is now enabled. When hovering over the green checkmark, you will see help text reading "disable." Clicking the green check mark will turn it into a red "x" and the user is now disabled.

Enable User   Disable User

Reset Passwords – You can reset a User's password in the dashboard by clicking on the icon (3 bars) in the settings column and selecting "Reset Password." You will be prompted to enter a new password for the User and confirm that password by re-entering the same password.

☰

✏ Edit User
✉ Resend Invite
🔓 Change Password
✏ Unset admin
⚠ Delete User

Password:

Confirm:

CREATE NEW PASSWORD

Users can also reset their password via email from the login screen by clicking "forgot password" and entering their email.

Assigning and managing phone extensions – See Section 3.3 for more details.

3.3 Managing & Assigning Phone Extensions

From the Tenfold "Users" Tab, you can manage and assign available phone extensions to users. Extensions can be assigned to both enabled and disabled users, however Tenfold will only provide analytics on and capture call logs in your CRM for enabled users with an assigned extension. Extensions become available for assignment once Tenfold has detected an external call to or from the extension. To assign an extension to a user, follow these steps:

1) Click on the "+" icon under device in the user's row
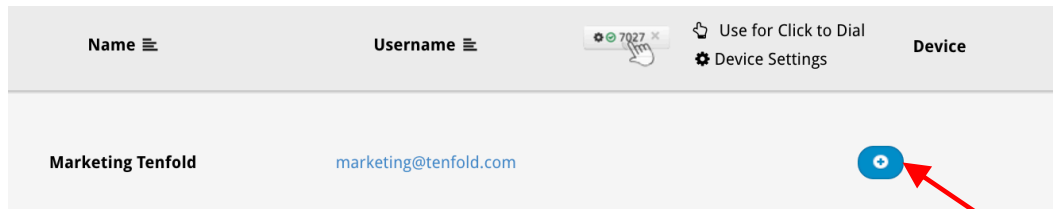
2) Begin to type in the user's extension and select it once you see it in the list
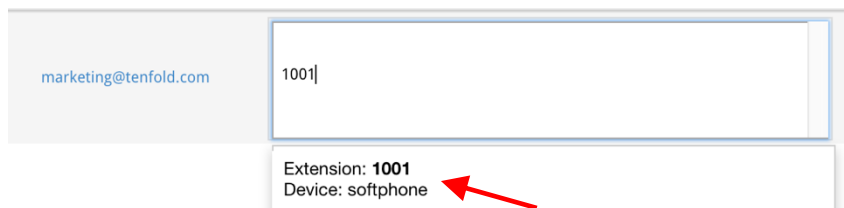
3) The user's extension will now appear active and assigned in the devices tab.
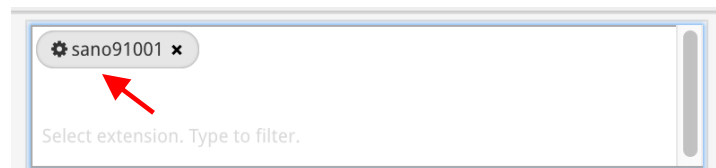
If you would like to remove an extension from a user's profile, you can do so by clicking the "x" on the specific extension in the user's device section.
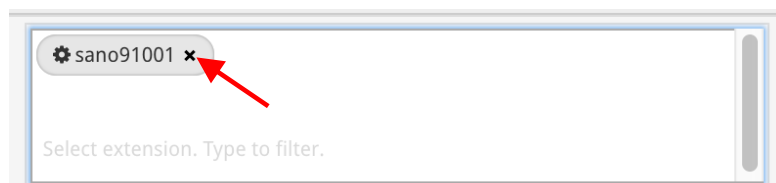
If a user has multiple extensions, you will want to set one of these to their primary extension for click to dial. You can do this by clicking on the gear icon in the extension and ensuring the "Primary" box is lit up blue with a checkmark as below:

Phone settings

Is this your primary Click to Dial device?	✓ Primary
Extension ❶	sano91001
Username ❶	
Password ❶	

Change Advanced Options

Cancel Save

If this is not marked as primary, simply click on the primary box and it should turn blue indicating it has been made into the Primary extension.

3.4 Managing Tenfold Teams (User Profiles)

Tenfold enables you to create Teams, which function as user-profiles. Teams consist of a manager and assigned user(s). Teams provide a few key capabilities across the Tenfold platform. First, Teams allow for you to visualize analytics broken down by teams compared to one another or to limit analytics visibility to only users that are part of a team. Second, several features in Tenfold's solution can be configured uniquely for specific teams to help further customize the solution to meet the unique requirements of specific teams across your company.

Teams can be setup manually or by synchronizing based on some User-level attribute in the CRM.

To set up Teams automatically by synchronizing users, follow these steps:

1) Navigate to Company Settings > Teams **if you don't see "Teams" please ensure the "Teams" feature is enabled on the Features tab of the dashboard
2) Click on Synchronize with _____ (your CRM)
3) Select a field to use for Synchronizing in the prompt (often Role ID or Profile ID)
4) Click "Synchronize Teams"

To set up Teams manually, follow these steps:

1) Navigate to Company Settings > Teams **if you don't see "Teams" please ensure the "Teams" feature is enabled on the Features tab of the dashboard
2) Click "Create Team"
3) Enter a Team Name
4) Search for Tenfold Users to select a Team Manager
5) Once created, you can add Team members, edit the Team Name, Team Manager or Analytics Visibility for the Team and delete the team, if needed.

3.5 User Profile Setup

Tenfold Users can manage certain settings on their "Profile" tab. From the Profile tab, an end user can manage their Primary Extension and configure Email Templates*.
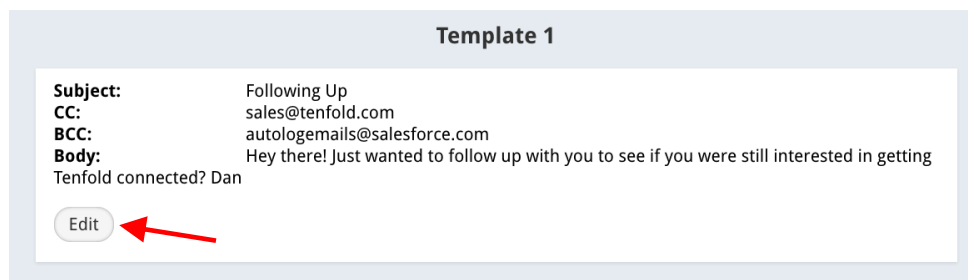
Managing Primary Extension – A user may have multiple extensions assigned to them for a variety of reasons (i.e. devices have unique extensions, multiple phone systems). From the Profile tab, a user can designate their Primary Extension. The Primary Extension is the extension used for Click to Dial attempts. This is especially important when users have multiple extensions assigned.

*Configuring Email Templates** – Users can setup and manage available email templates from the Profile Tab. If configured for your organization, email templates allow for emails to be sent to matched records before, during or after a call using mail:to links and the primary email address of the matched record. Currently, email templates support user-level templates only and up to 4 email templates using mail:to links only.

To configure email templates, users should follow these steps:

1) Navigate to Profile > Email Templates
2) Select the Template you want to customize (Templates 1-4)
3) Click "edit"
4) Enter values for "Subject" and "Body"
5) Optionally you can add values for "CC" and "BCC"– Note that many CRMs offer a BCC email for logging emails in the CRM.

Templates when configured will look like the below on the profile page:

Template 1

Subject:	Following Up
CC:	sales@tenfold.com
BCC:	autologemails@salesforce.com
Body:	Hey there! Just wanted to follow up with you to see if you were still interested in getting

Tenfold connected? Dan

[Edit]

*These features are only available in some plans and must be enabled and configured by an Admin for your organization. See Section 5 "Configuration of Advanced Functionality" for more details

3.6 User Administration Troubleshooting

See Section 7 "Support" for more details.

# 4 Configuration of Core Functionality

4.1 Click to Dial Setup & Settings

Click-to-Dial (CTD) is a key feature of Tenfold's solution. Depending on the UI you are using, Click to Dial may work a bit differently. For Tenfold's Chrome Extension or when using the CTD only

Chrome Extension any detected phone number on any Chrome page will be clickable. When using the OpenCTI solution within Salesforce, Tenfold will hyperlink all phone number fields in SFDC for easy dialing, however phone numbers outside of SFDC will not be clickable.

To take full advantage of CTD with Tenfold, there are some settings you may need to configure.

> *Supported Country-Codes* – by default Tenfold is setup for the US, UK, Ireland and Australia. Note that this is only relevant for the Chrome Extension-based CTD. To verify which country codes are enabled and to enable further country codes, navigate to Company > Phone System and enter the additional country codes:
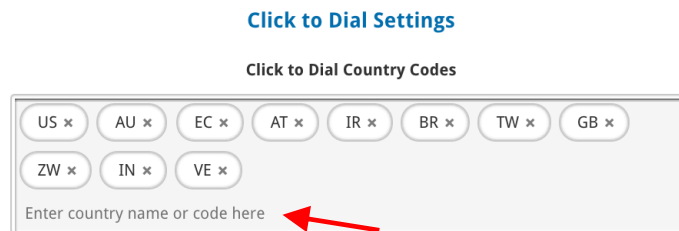
> *Dial Out Prefix* – Depending on your phone system setup, dial-out prefixes can be setup in a few different ways. If you are having trouble dialing out and believe this may be due to incorrect prefix settings, please reach out to Tenfold support at support@tenfold.com.

> *Primary Extensions* – See Section 3.3 on managing and assigning phone extensions.

4.2 Screen-Pop Settings

Tenfold's solution provides automatic recognition of callers when detected based on an ANI lookup against phone-type fields in the CRM for both inbound and outbound calls. The info on the matched record is presented in Tenfold's UI. This functionality is also known as a screen-pop.

Tenfold provides a lot of configurability around screen-pops to help companies optimize Tenfold for their use-case and desired user experience. Here's an overview on key areas of configuration for inbound and outbound screen-pops:

> *Create Record Buttons* – Many times calls will result in a scenario where no matching records are found, or the matched record(s) do not account for the caller. In these cases, you may want the ability to easily create a new record from the Tenfold UI. Enable this feature and simply check the box next to each of the records you want your Users to have the ability to create from Tenfold.

Select the Modules to create records from the Floating UI

- [ ] Prospect__c
- [x] Lead
- [x] Contact
- [x] Account

Save

Customize Information Tab View – See Section 4.8.

Custom Objects Support – For more information on setting up Tenfold to support matching, relation and creation of Custom (Non Standard) objects, please reach out to your Customer Success Manager or Tenfold Support at support@tenfold.com.

For a list of Standard Objects, review the CRM Guide for your CRM in section 2.2.

4.3 Call Logging Settings

Tenfold helps companies automate and simplify the process of logging calls in CRM along with relevant metadata and captured context. For more information on standard call log field mappings by CRM, revisit the guide for your specific CRM(s) in section 2.2.
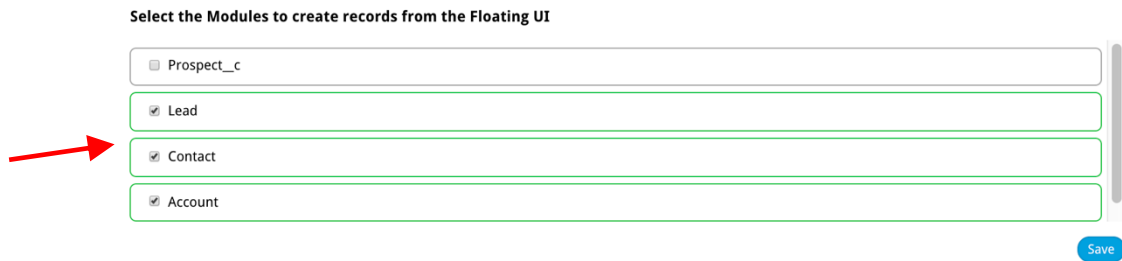
Tenfold provides a lot of configurability around call logging to help companies optimize Tenfold for their use-case, desired user experience and reporting needs. Here's an overview on key areas of configuration for Call Logging:

Don't Auto Log Calls – By default, Tenfold will log all calls to the CRM with no user behavior needed to ensure all data is captured. Enable this setting under the Features tab > "Don't Auto Log Calls" if you would like to update Tenfold to only log calls when a user hits "Save" in the UI.

Follow-up Task Edit – By default, Tenfold is setup to create a new activity in the CRM for every call. Sometimes users may be calling from an existing task that is part of a campaign or was manually created and assigned. Enabling this setting allows you to setup logic for updating existing tasks when certain criteria are met, instead of creating a brand-new task. To configure this setting, choose whether you want to look for open tasks before, after or on the date of the call and how many days in either direction.

Log Unmatched Calls to CRM – By default, Tenfold will not automatically capture calls that are in a no-match or multiple-match scenario where the user does not resolve down to a single match. Enable this setting, if you would like to capture these calls against specific records for reporting purposes and to ensure that all calls are logged in CRM. You can enable this for No-Match, Multiple-Match or Both. You will need a Record ID for each scenario you would like to enable.

Talk-Time – By default, Tenfold logs call duration in the Tenfold analytics and in CRM based on the time between the call connecting and being hung-up. Enable this setting if you prefer to measure and capture this as the time between ringing and hang-up.

4.4 Note Box Settings

All Tenfold UIs allow for users to capture notes along with the logged activity in the CRM. Notes are captured differently depending on your CRM and settings. To configure the Notes Box for your Organization, navigate to the Features tab and select "Notes Setup." Here's an overview of key settings for optimizing the way the Notes Box works for your users:

Keep Floating UI open after saving the notes – This setting applies to the Chrome Extension only. By default, the Tenfold Chrome Extension disappears when a call is saved. Enable this feature if you want to keep the Chrome Extension maximized, even after a user has saved their notes.

Open the Call in Your CRM after Saving It – By default, when saving, Tenfold captures the call but does not launch the user into the CRM activity. Enable this setting if you would like Tenfold to automatically open the created task after each call, allowing users to see and update any other fields when they click "save."

Remove Phone Number from Call Subject – By default, Tenfold's call subject contains OBC or IBC for inbound call, the associated number and the beginning of any notes. Enable this setting if you would like to remove the phone number from the subject line of the logged activity in your CRM.

Save Follow up Task as Event – This setting is only supported for Salesforce. By default, Tenfold will create follow up tasks as open activities scheduled for the chosen date. Enable this setting if you would prefer that Tenfold creates an event for follow up tasks instead of a standard open activity.

Display Notes from the Previous Call – By default, Tenfold will display blank in the notes box for a new call. Enable this setting if you want Tenfold to display the notes from the most recent call in the notes box for users to add on to instead of starting blank.

Prepend Notes on Every Save – By default, when a user saves the same call multiple times, Tenfold will over-write the notes on the CRM activity with the notes from the latest save. Enable this setting if you would like Tenfold to prepend the notes on each save event, as opposed to updating them by over-writing old notes with the new notes.

4.5 Creating Follow up Tasks with Tenfold

Tenfold allows users to easily create follow up tasks from the Tenfold UI in one of two ways. First, users can leverage Natural Language Processing (NLP) to automatically create tasks based on a combination of action phrases and a date in the Tenfold Notes box.

Second, users can leverage the follow up task calendar module to select a specific date and time for a scheduled follow-up activity. To configure this feature, navigate to Features and select "Notes Setup." Enable the setting for "Use Date Picker to Select Follow up Date."

In either scenario, the follow-up activity will be created and associated with the matched primary object (i.e. lead, contact, account).

4.6 Cases & Opportunities Setup

Tenfold Allows you to enable users to manage cases and opportunities from the Tenfold application. This includes displaying existing opportunities/cases that are related to the matched object (i.e. Account or Contact), relating calls to these existing opportunities/cases or the ability to create a new opportunity/case that automatically is related to the matched object with a single click from the Tenfold UI. Setting up this functionality is as simple as enabling "Opportunities" and/or "Cases" from the "Features" tab of the dashboard.

There are some additional advanced settings you can configure for these features:

Cases:

1) Auto-relate call to existing case – enable this setting if you would like calls to automatically be related to cases when a matched record has a related case

2) Only display cases related to the contact – by default Tenfold will display all cases related to the account of the matched contact. Enable this setting if you only want to display cases specific to a matched contact record.

3) Show Closed Cases – by default Tenfold will only display Open cases. Enable this setting if you would like your users to have the ability to relate calls to existing Closed cases, as well.

Opportunities:

1) Auto-relate call to existing opportunity – enable this setting if you would like calls to automatically be related to opportunities when a matched record has a related opportunity

4.7 Setting Up Call Dispositions

Tenfold Call Dispositions allow you to incorporate picklist/drop-down fields from your CRM into the Tenfold "Actions" tab. Once incorporated, users can make selections and update fields for the Call Disposition fields. Setting up Call Dispositions can be done by following these steps:

1) Navigate to the Features tab and select "Dispositions"
2) Enable this feature if it is disabled by clicking on the red "Disabled" button
3) Select the relevant Team or select the whole Organization
4) Select the relevant CRM Object for the Call Disposition(s)
5) Select the Fields for the CRM Object that should be visible for users

6) Select the Field Values for the Field that should be an option for users on calls
7) Drag and drop the fields to change the order that the fields show up in
8) Click "Save"
9) Dispositions should show for assigned users on the next interaction

Configure your Dispositions

Follow Up dispositions

☑ Enabled   Save settings

Configure dispositions for

Organization   ⬍

Select the module

Select the module   ⬍

Select the fields to be displayed in the Floating UI

Drag and drop the fields to select the order to be displayed in the Floating UI
We only save the order for the fields you have selected

| ☑ Priority   ☐ Required | ☑ High |
| | ☑ Normal |

☐ Subject   ☐ Required   ☑ Call
                                                                     ☑ Send Letter
                                                                     ☑ Send Quote
                                                                     ☑ Other

☐ Status   ☐ Required   ☑ Open
                                                                     ☑ Completed

4.8 Customizing the Tenfold Information Tab

Tenfold's "Information Tab" is a powerful capability that allows you to dynamically display relevant fields and associated data from your CRM based on attributes of a matched record and the team-membership of the End User. The information tab is customized by these steps:

1) Navigate to the Features Tab and select "Customize Information Tab View"
2) Select a CRM Object
3) Create a Layout
4) Name the Layout
5) Assign relevant Teams or select the whole Organization
6) Create and Name Field Groups for the Layout
7) Select and Organize Fields within Each Group
8) Save the Layout

5 Tenfold Analytics

5.1 Overview of Tenfold Analytics

The Tenfold Analytics page can provide your Organization with a wealth of knowledge regarding the productivity of your Organization, Teams and Users. From here, you can either get a broad look your Organization or gather information on how individual Teams or Users are performing.

On the left, the User will have the quick ability to switch between Company View, Specific Teams, Specific Users (drill-down), and You (the User logged in currently).

On the right, the User can click on the calendar to pick between pre-set time options as well as input a custom range with the use of a calendar view to update the time period for analytics.
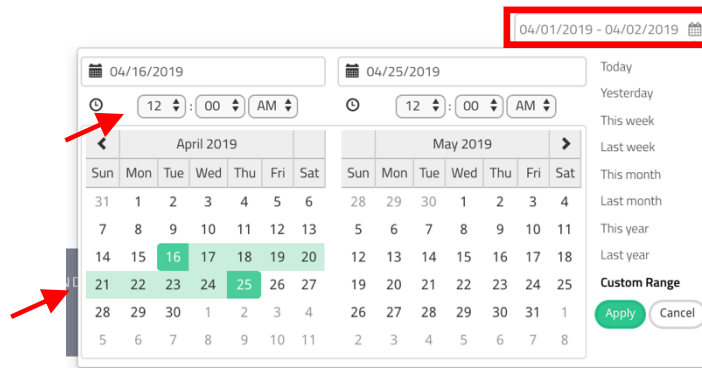
Leaderboard – The leaderboard in Analytics will call out Top Performers for your Organization. Who saved the most call notes in the CRM? Who spends all their time on the phone? Who in your Organization hits the sweet spot for Quality Connects? What User is answering all the inbound calls?
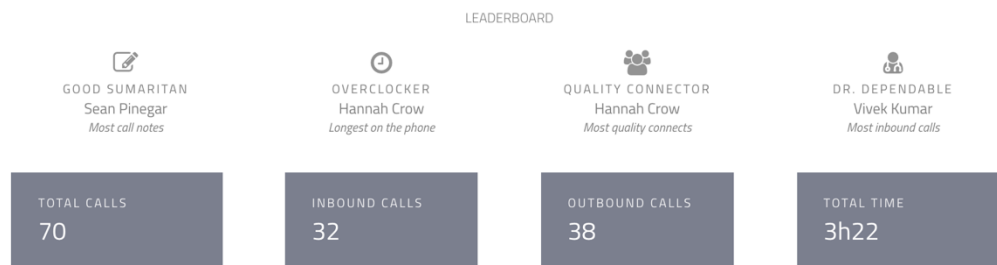
Call Graphs – The Calls Graph will give your Organization a visual representation of your performance. The data presented in this graph can be dynamically updated to represent the type of information you need. The filters provided are: Number of Calls vs. Call Time

and User vs. Hour of Day. The data presented can also be Grouped by User if Hour of Day, Number of Calls, or Call Time is selected as the Filter.
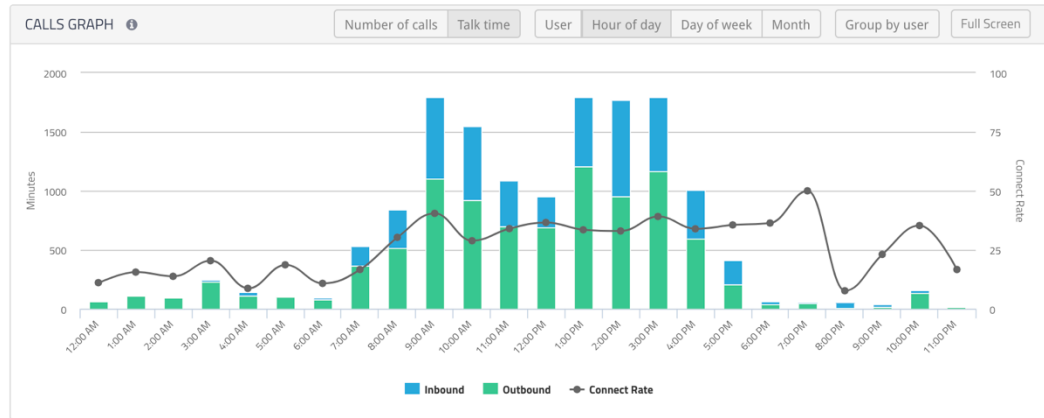
User Table – This table gives calls statistic summaries for each User tracked during the selected timeframe. Clicking on a username will provide you with a detailed list of the User's calls. Statistics can be filtered further by Inbound or Outbound calls.

			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%
Alex Wettreich	173	54h02	18m44	5	50.3%	139	0	97	49h39	00s	78.4%
robert hammond	388	34h38	5m21	4	61.3%	175	13,050	35	15h10	522h	45.1%
Thomas Webster	324	54h19	10m03	4	62.0%	232	0	48	19h47	00s	33.2%
Sean Pinegar	87	12h50	8m51	2	40.2%	54	0	24	12h20	522h	50.0%
Manjula Kumari	43	40m48	56s	1	34.9%	31	0	0	14m33	00s	3.2%

Note: The threshold for "Long Calls" and "Connects" is set in by your Admin. See section 2.1 for more information on configuring these settings.

Call History – Below the User Call Totals will be the User's Call History. This table will show a detailed list of all calls made for the selected time period including:

- Time of the call
- Direction of call (Inbound/Outbound)
- Extension the call came through
- The Phone number the call was made to or received
- Time (Duration of call)
- CRM (This will display a Y if there was a match in the CRM for that number. It is possible that a Y is present, but no name is in the Contact field. This could be due to a multi-match scenario where multiple Contacts matched the number)

- Contact (This field will display the name of the caller if the contact was matched in your CRM. If no match was found it will be blank.
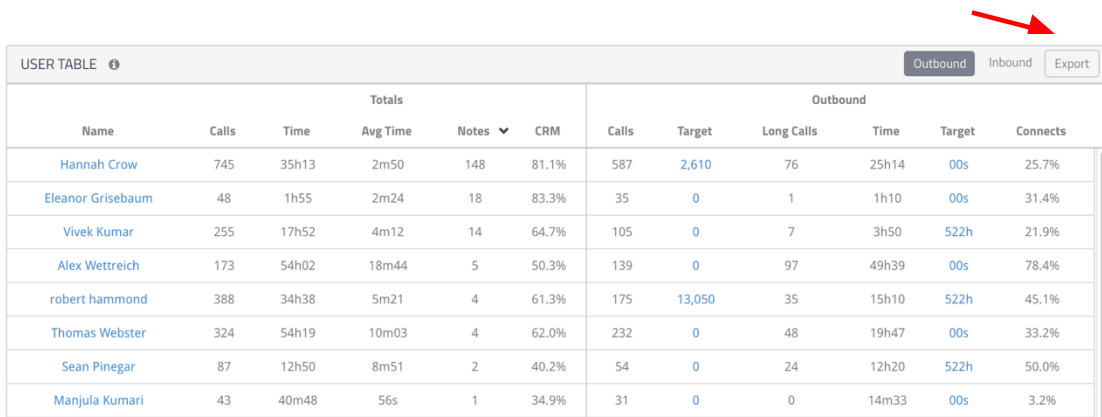- Description (If a note was written to the CRM, it will be displayed)

5.2 Managing Tenfold Analytics Visibility

Tenfold allows you to restrict analytics visibility for standard Users to their own analytics or allow them to see all analytics for the organization. This is currently managed under Company Settings which can be found by navigating to Company Settings > Company under "Analytics Visibility."

5.3 Exporting Tenfold Analytics

Tenfold's Analytics Dashboard allows for exporting of raw data in .csv format from the then-current dashboard view. Exported data is bound to the same analytics visibility settings as the dashboard data visibility. To initiate a data export, follow these steps:

1) Select the data you want included (i.e. Company, Team or User)
2) Select the date and time range for which you want data
3) Click on the "Export" button in the User Table
4) Open your .csv file once downloaded

USER TABLE ⓘ		Totals				Outbound					Outbound / Inbound / Export
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%
Alex Wettreich	173	54h02	18m44	5	50.3%	139	0	97	49h39	00s	78.4%
robert hammond	388	34h38	5m21	4	61.3%	175	13,050	35	15h10	522h	45.1%
Thomas Webster	324	54h19	10m03	4	62.0%	232	0	48	19h47	00s	33.2%
Sean Pinegar	87	12h50	8m51	2	40.2%	54	0	24	12h20	522h	50.0%
Manjula Kumari	43	40m48	56s	1	34.9%	31	0	0	14m33	00s	3.2%

5.4 Display Options

Tenfold's Analytics are generally accessed from the "Analytics" tab on the Tenfold dashboard. The Analytics views can be displayed in additional ways allowing them to be incorporated into wallboards and accessed from within your CRM.

Displaying Tenfold Analytics on a TV/Wallboard – To display Tenfold Analytics on a TV or Wallboard follow these steps:

1. On the TV or computer which connects to the display monitor, log in to your Dashboard as a user who has permission to view the analytics you would like to display.

2. Use this sample URL for your big screen view: http://dashboard.tenfold.com/analytics?tv=true&chart=hour&interval=day&talktime=false&groupby=false

3. Set parameters below by adding the string to your URL as desired (&parameter=value):

> interval: day (default) | week | month
> usertable: outbound (default) | inbound | false
> hideleaderboard: false (default) | true
> hideoverallcallstats: false (default) | true
> chart: false (default) | hour | user | day | weekday | week
> groupby: false (default) | user
> talktime: false (default) | true

4. If you want your Analytics to refresh throughout the day, consider installing a Chrome Extension to auto-refresh the page.

Incorporating Tenfold Analytics into Salesforce as a URL tab – Salesforce supports integrating web tabs within the dashboard. This enables users to review metrics without having to navigate away from the application. Web tab support is available in both Salesforce Classic and Lightning Experience. Please see this [Salesforce page](#) for detailed instructions on how to integrate web tabs. To incorporate Tenfold Analytics into Salesforce as a URL tab follow these steps:

1. Inside your Salesforce instance, navigate to "Setup"

2. Type "Tabs" in the Quick Find box, then select Tabs

3. Click "New" in the Web Tabs related list

4. Choose a layout configuration for the new tab -- Note: The "full page" style spans the entire page and removes the sidebar. The "column" style allows users to keep the sidebar visible and then click "Next"

5. Enter a label to display on the tab

6. Click the Tab Style lookup icon to display the Tab Style Selector and click a tab style to select the color scheme and icon for the custom tab

7. Enter the URL of the desired web tab. For Tenfold Analytics you will use: http://dashboard.tenfold.com/analytics?tv=true&chart=hour&interval=day&talktime=false&groupby=false (to customize please see above section 6.4.3.)

8. Select "Append tab to users' existing personal customization" to apply the tab visibility settings to all users and then click "Save"

6 Support

6.1 Self-Service Troubleshooting

The Tenfold Knowledge Base is a great resource for up to date information on Tenfold's solution, configuration of features/functionality, as well as troubleshooting of common issues. Some common issues that may be simple to resolve through these troubleshooting steps include:

- Click-to-Dial not Working
- Calls not Logging
- Tenfold UI not Responsive to Calls
- Search not Returning Matching Records (Showing Unknown despite matches)
- Users not Showing in Dashboard

In the event that issues are only affecting a single user, have the user take the following steps and confirm if the problem still persists:

- Confirm the User's Extension is Assigned properly in the dashboard
- Login/Logout of Tenfold
- Uninstall/Re-Install the Chrome Extension (Chrome Extension users only)

If none of these steps work, see below for contacting Tenfold's support team to assist.

6.2 Contacting Tenfold Support

Tenfold offers two levels of support for Customers. Standard Support which is available between the hours of 8am and 7pm US Central Time (GMT-05:00) and Premium Support which is available 24/7. If you would like to confirm which support model your company currently has in place or request more information on Premium Support, please contact your customer success manager of the tenfold support team at support@tenfold.com.

Tenfold's support team is here to help you across several channels:

- Chat with us 24/7 from Tenfold's website (or leave a message if no availability)
- Email us to automatically create a ticket at support@tenfold.com
- Call us on Tenfold's dedicated support number at (415) 599-1170 Option 2
- For less urgent matters, you can reach out to your customer success manager