tenfold

Tenfold Desktop App for Salesforce

User Guide

Tenfold Salesforce Desktop User Guide
Version 1.1

salesforce

Last Updated: April 6th, 2019

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1.1 About Tenfold Desktop App for Salesforce

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

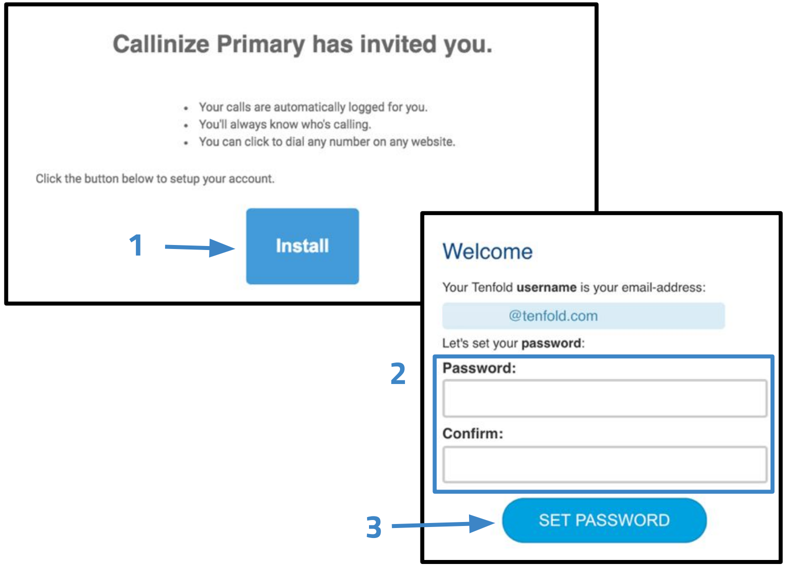
- Support for Classic, Lightning and Console views
- Click-to-dial from any phone number in Salesforce
- Screen-pop with customer info based on ANI
- One-click to SFDC record from the Tenfold Desktop UI
- Automatically Log inbound and outbound calls
- Easily capture notes, call dispositions and next steps
- Relate calls to standard/custom Salesforce objects
- Click-to-Create standard/custom Salesforce objects
- Call data available in Salesforce for reporting
- And much, much more...

1.2 Intended Audience

This Guide is intended for End Users from companies leveraging the Tenfold Desktop solution for Salesforce 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 Salesforce.com 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.

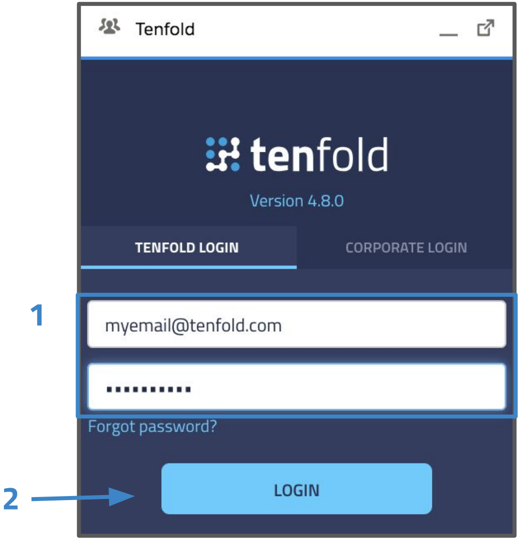
2.1 Creating Your Tenfold Account

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.



2.2 Logging in to Tenfold

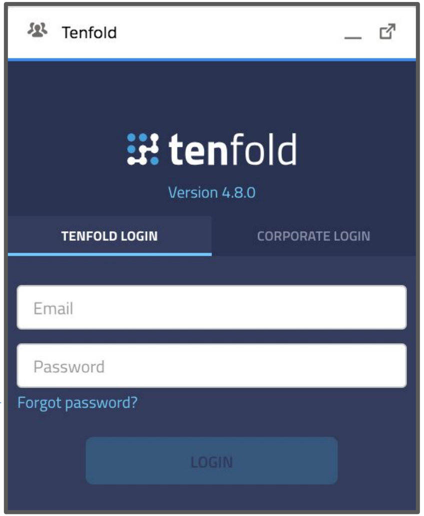
Logging into the Dashboard will keep you logged into the Tenfold Desktop application. If you find that you are no longer logged in, you can either log into the [Tenfold dashboard]() or log into Tenfold Desktop application directly.



2.3 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.

1



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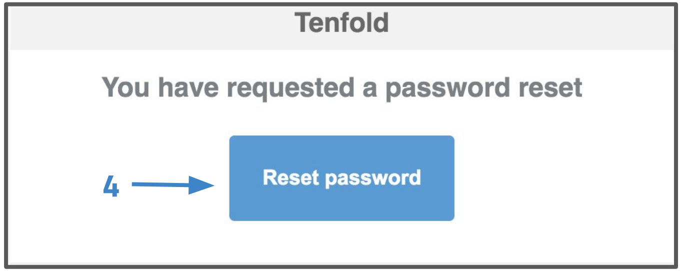

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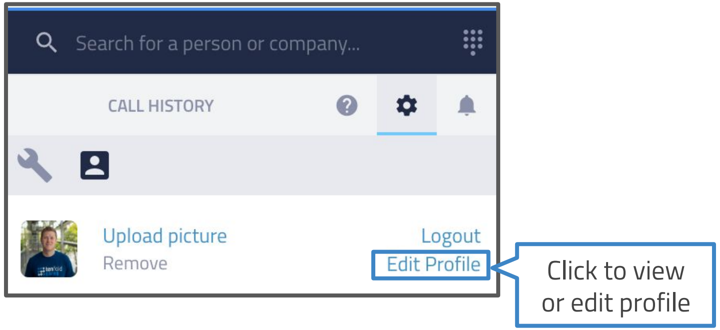
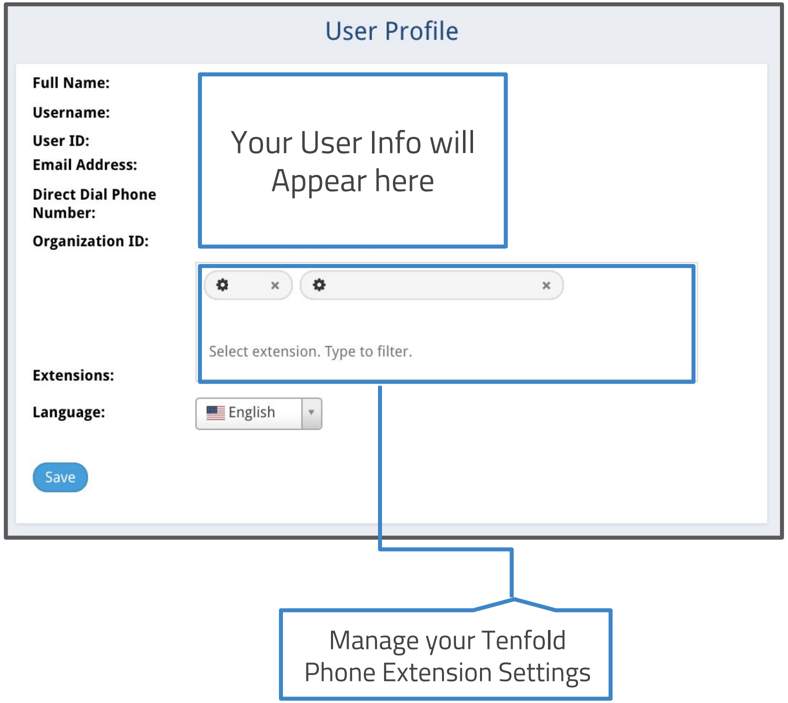
2.4 Managing your Tenfold Profile

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."

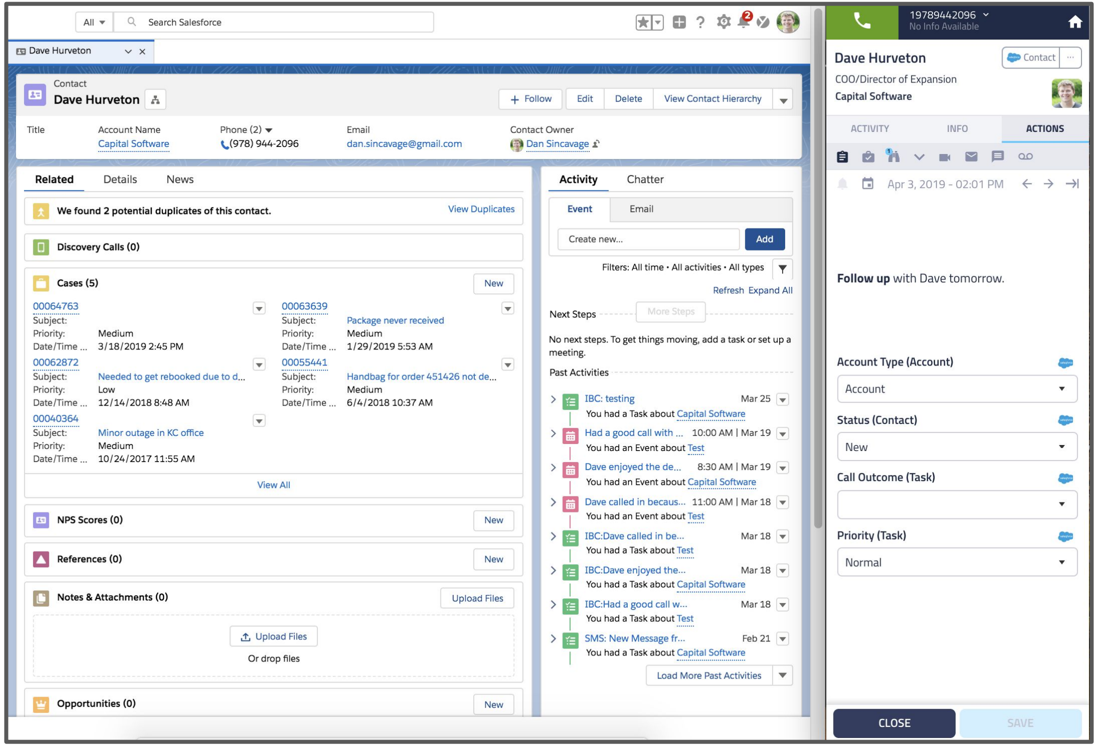




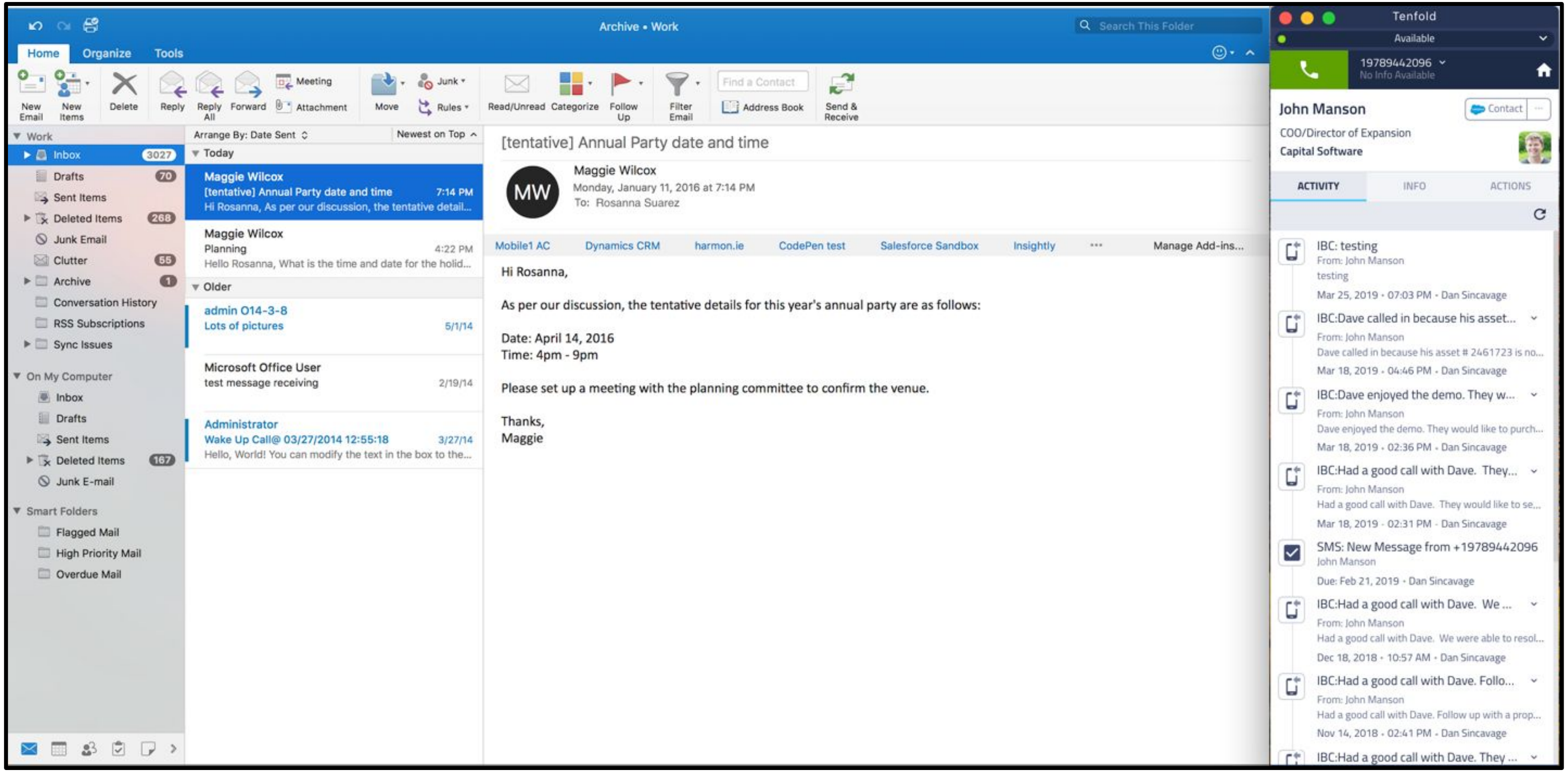
From your Tenfold Profile Page, you will be able to access key information about your Tenfold account, manage your Tenfold extension(s), Update your language profile and make changes to your email template settings.

3.1 Tenfold Desktop App for Salesforce

- Tenfold's Desktop App UI for Salesforce lives as a separate app from your browser or from the Salesforce window. This allows you to interact with Salesforce 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.

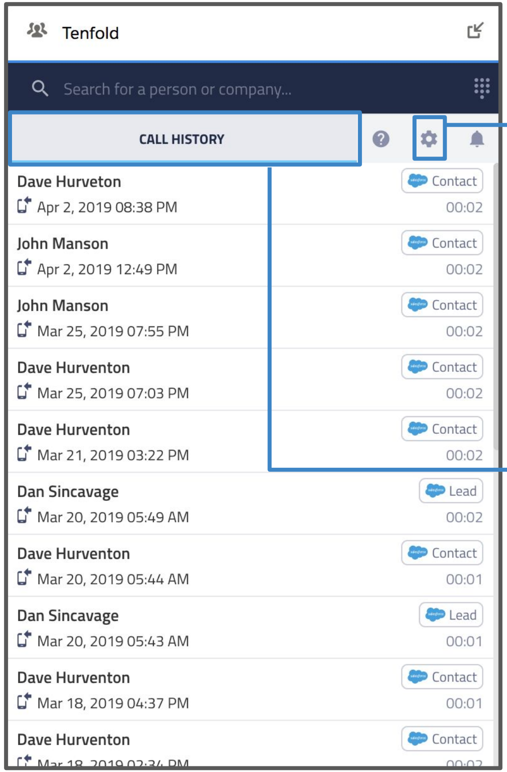


This allows you to have access to see, interact with and update Salesforce, even when your in applications like Outlook:



4.1 Home Page & App Settings

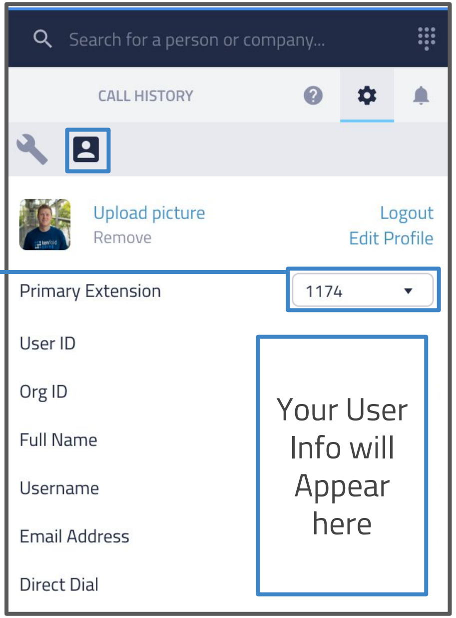
Home Page



Update Your Primary Extension (Click to Dial Extension)

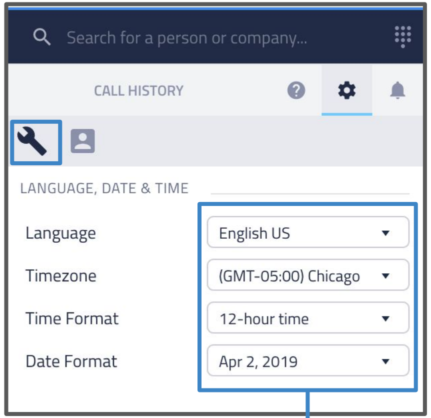
Call History Displays Your Last 20 Calls - Click the SFDC Icon to access the record or the name to access the call in Tenfold

Settings > Profile



Your User Info will Appear here

Settings > General

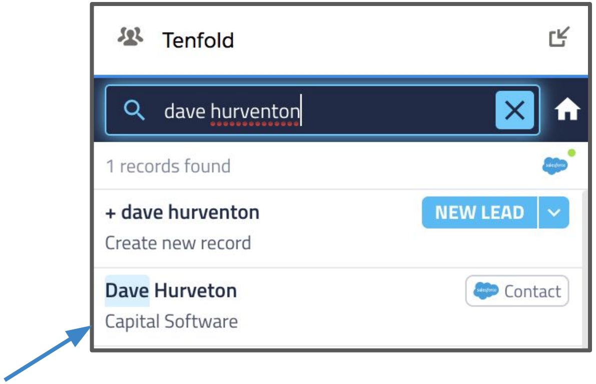


Manage Language & Time/Date Settings

4.2 Search for Records or Create New Record

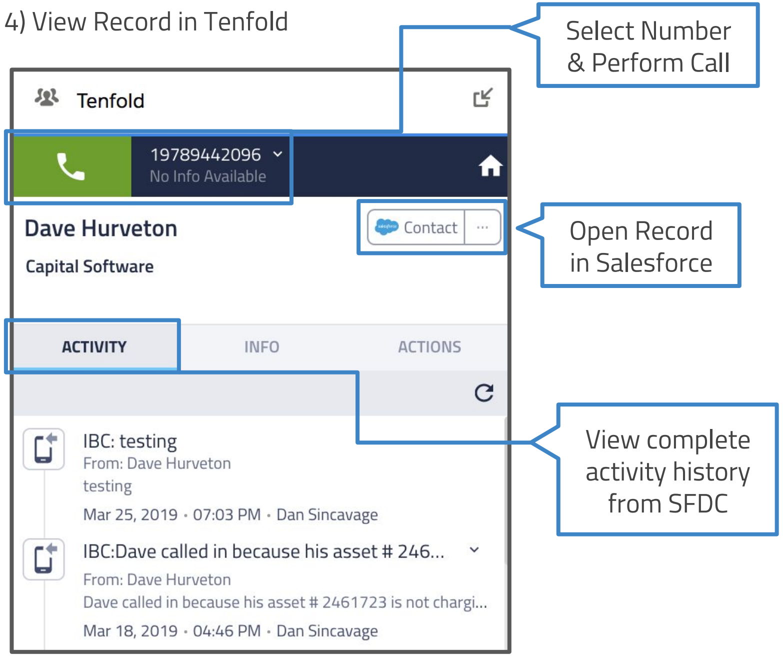
1) Click on the text entry search bar

2) Enter the name of a person or company

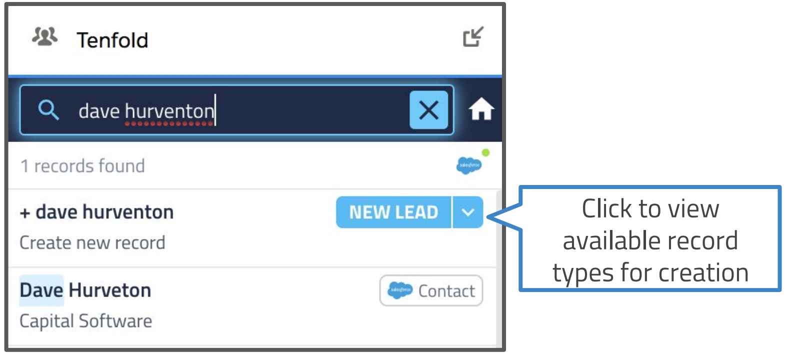


3) Click on the record to view in Tenfold

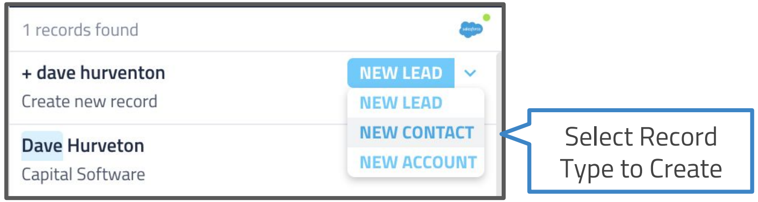
4) View Record in Tenfold



5) Click on new record button to create new record



6) Choose the type of Record you would like to create



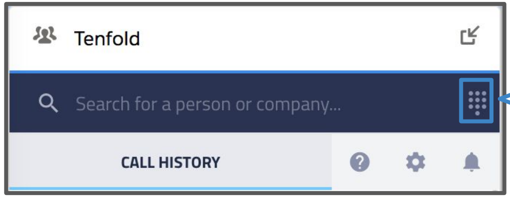
7) Optionally enter E-mail and Click "Create and View Record"

8) Record will be automatically created and displayed in Tenfold

**Note that record creation may be disabled by your admin

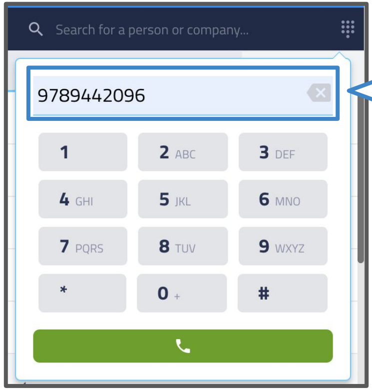
5.1 Placing Calls with Tenfold Dial Pad

1) From the home page, click on the dialpad icon



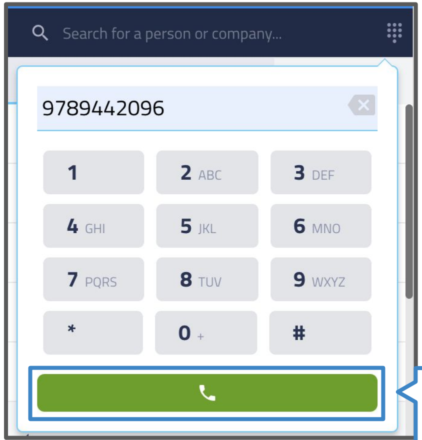
Click to open Tenfold Dial Pad

2) Type in the number or enter using the key pad



Enter Number to Dial out to

3) Click the green dial icon or press enter to initiate a call



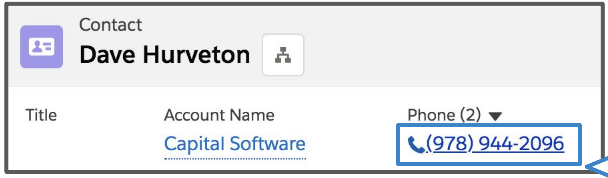
Click to place call

4) Call will initiate and Tenfold will show a success message

5.2 Placing Calls with Click to Dial

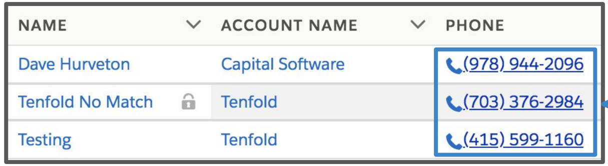
Using the CTD chrome extension, Tenfold will turn all phone numbers on any Chrome web page into hyperlinked numbers that can be clicked on to dial out automatically.

Click to dial works in detailed record views:



Click Number to Dial Out

Click to dial also works in Salesforce list views:



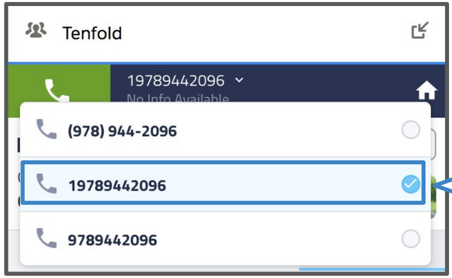
Click Number to Dial Out

A link to download the CTD chrome extension can be found in the Settings > General Settings tab on the Desktop App.

5.3 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.

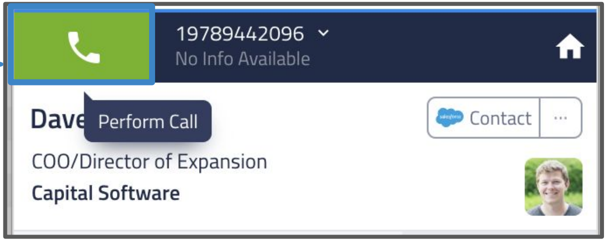
1) Select the phone number to dial out to



Select Number to Dial out to

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

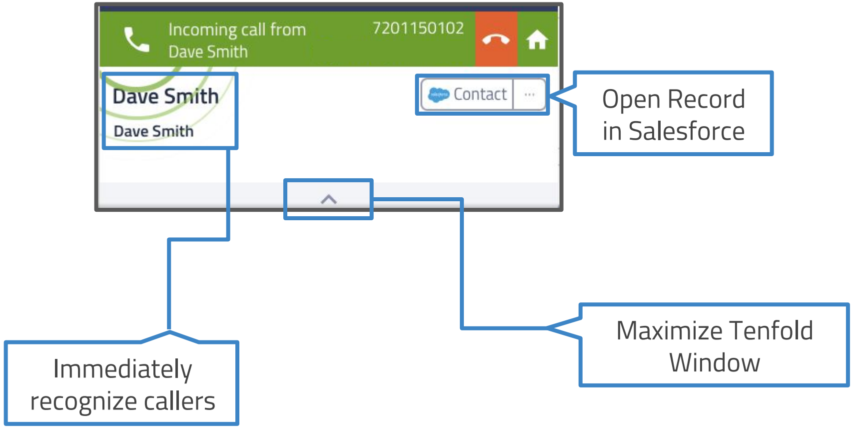
Place Call



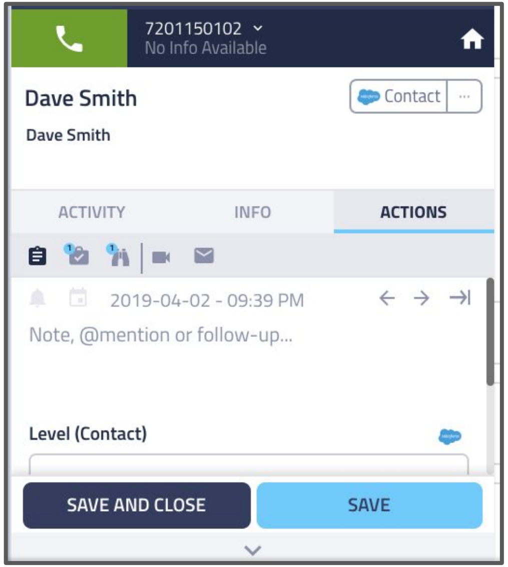
6.1 Incoming Calls with Tenfold

Tenfold will automatically capture inbound calls in Salesforce whether or not a user interacts with the Tenfold UI on a call. In order for the Tenfold Desktop UI to pop up information on the incoming caller, the user must be logged into Salesforce, as the Desktop app is embedded within the Salesforce UI.

1) On incoming calls, Tenfold will pop up in minimized view

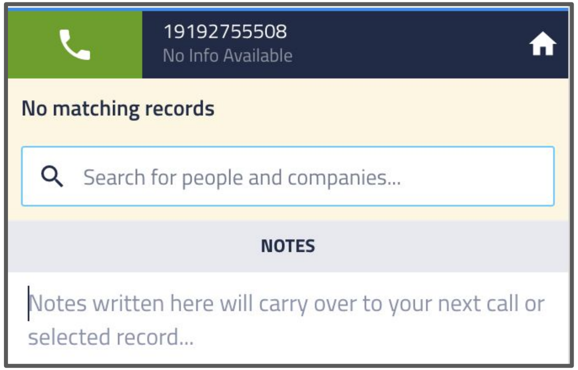


2) Once maximized, Tenfold will expand into normal record view



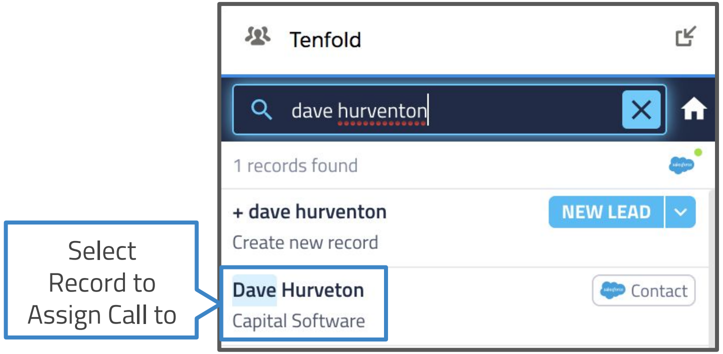
6.2 No Match Found View

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

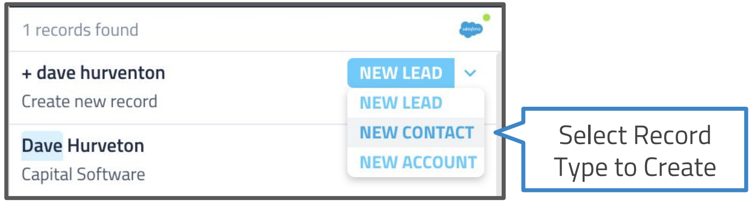


1) You can start typing notes that will be carried over once a record has been selected. To select a record, begin typing in a name:

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

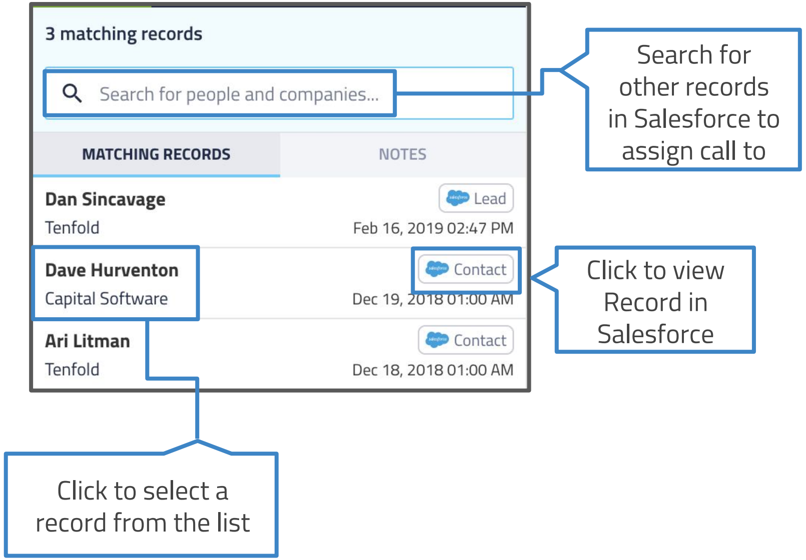


3) Or click-to-create a new record from the Tenfold UI

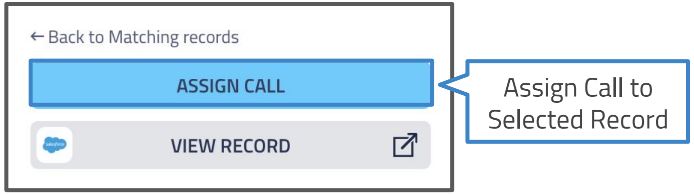


6.3 Multiple Match View

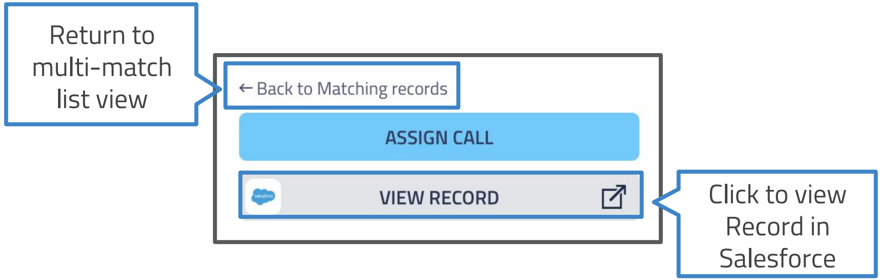
Sometimes people may call in from a number that exists across more than 1 record in the CRM, leading to multiple matches being found by Tenfold. This can happen due to duplicate records, shared phone numbers or corporate dialout rules. In these cases, Tenfold will display the Multi Match View:



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.

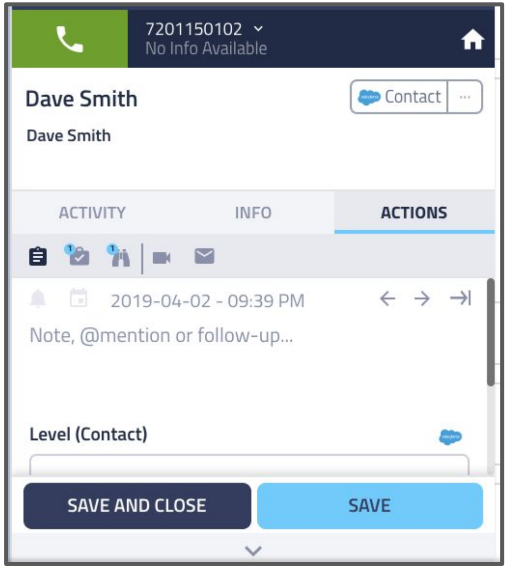


3) If you selected the wrong record or need further verification, you can either click "View Record" to open the record in Salesforce or "Back to Matching Records" to return to the list.



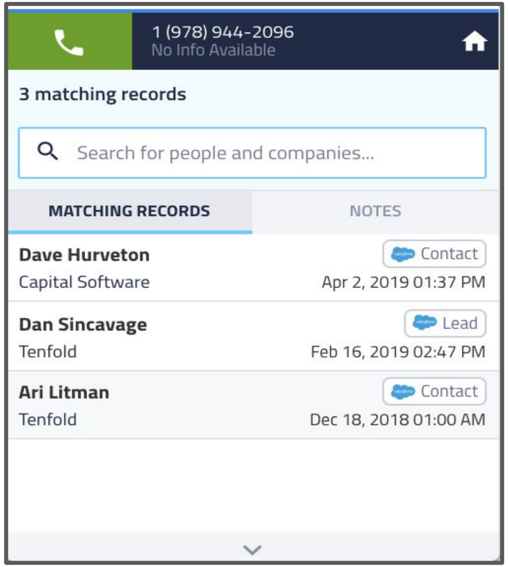
6.4 Recap of Call Scenarios in Tenfold - Tenfold's UI solves for the 3 main scenarios for inbound/outbound calls:

Single Match



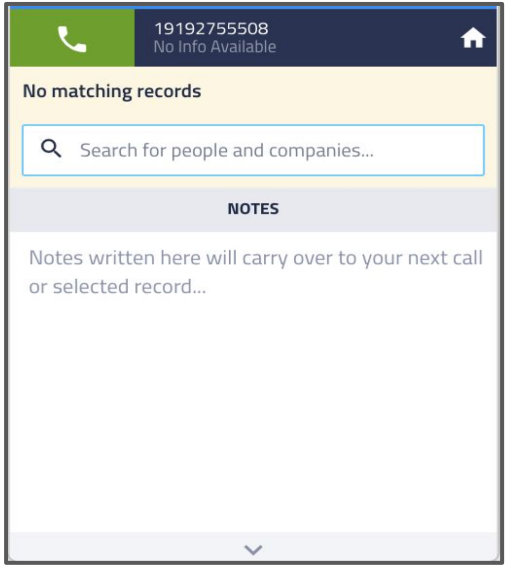
Presented when only one match is found or user resolves down to one record in no match or multi-match

Multiple Match



Presented when multiple matches are found allowing user to select, search for and relate or create new record.

No Match



Presented when no match is found allowing user to search for and relate or create a new record

7.1 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 2 primary sections:

1) Active Call Display

2) Workflow Tabs

7.2 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.

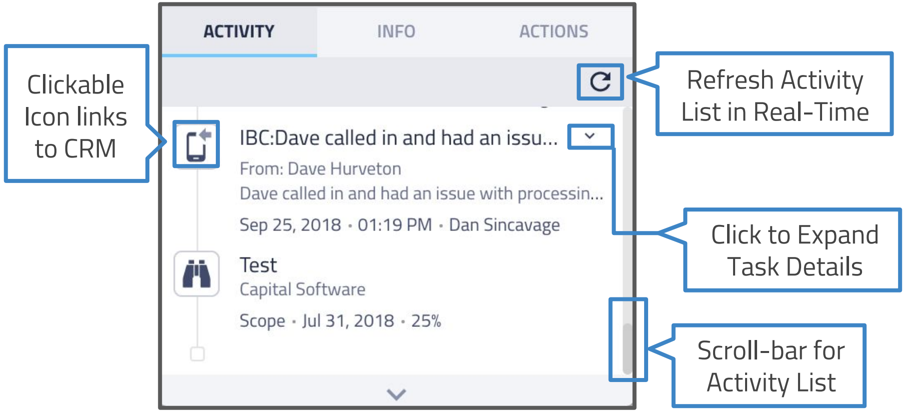
By default, the Active Call Display includes the record name, a link to the record, the parent record (i.e. Account), a link to the parent record, the status of the call, the duration of the call and the phone number of the matched record.

Some plans may include additional information, such as an image from matched social profiles, job-title from LinkedIn, Location, Line-type, Carrier and other 3rd party data that helps you have context about a caller and better service their needs.

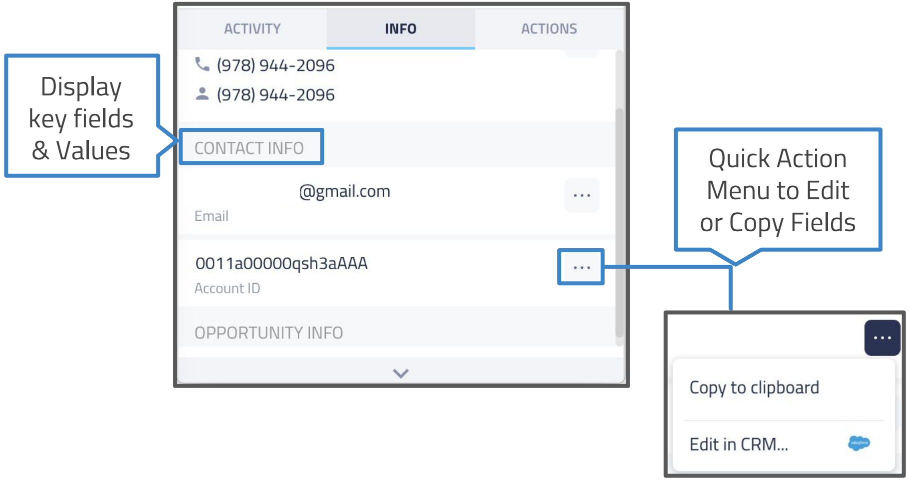
7.3 Workflow Tabs

Tenfold's UI consists of 3 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.



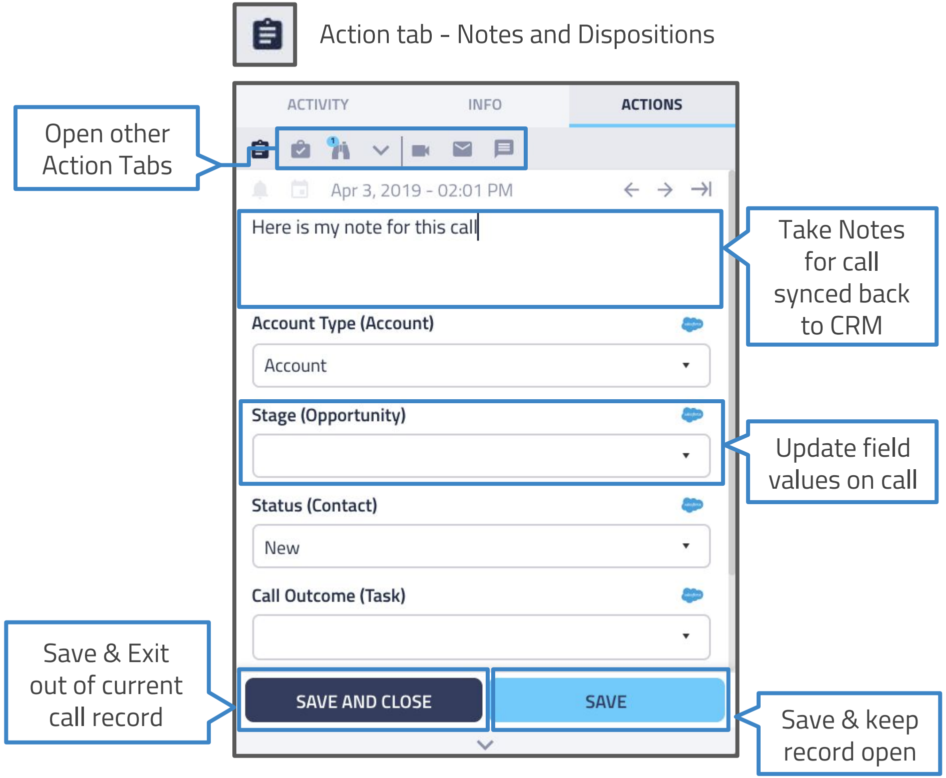
Info tab: The Info tab is a detailed view of key information related to the matched record and other related objects. The information that is displayed on the Info tab is customized based on your Tenfold team and the type of record (i.e. lead, account, contact) and related objects (i.e. account, case, opportunity) that you are interacting with.



Action tab: The Action tab is meant for just that -- taking action. The Action 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 Action 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)*
- ❏ Launch a screen-share/video call*
- ❏ Send an email template via mail:to links*
- ❏ Send an SMS (text message)*

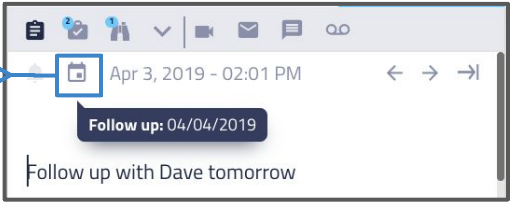
*Feature not available in all plans and may incur additional monthy or variable cost ; please check with your Tenfold admin for more details on these features



NLP Tasks & @mention

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

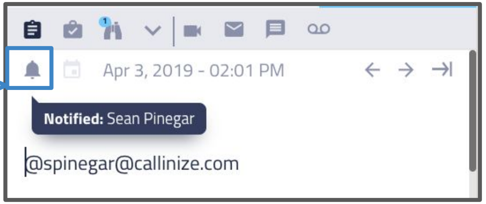
Calendar icon Indicates Task is being created



Action Phrases: "Call", "Follow Up", "FU", "CB", "Task", "Remind me to call", "Remind", "Remind me", "Retry", "Try again"

Dates: Days of the week, "morning", "afternoon", "in a week", "in x weeks", "next month", "in two months" and specific Dates.

Easily share notes with colleagues using @mention in your notes



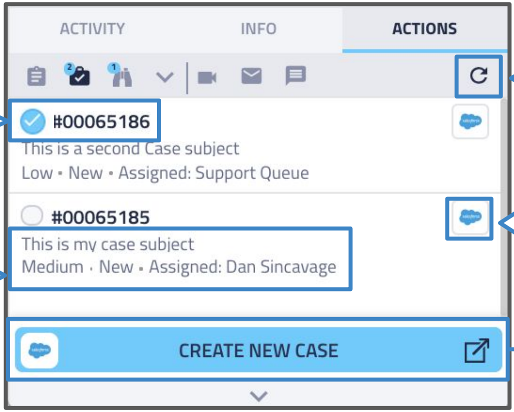
Action tab - Cases

Relate call to existing case

Refresh Case List

View Case Details

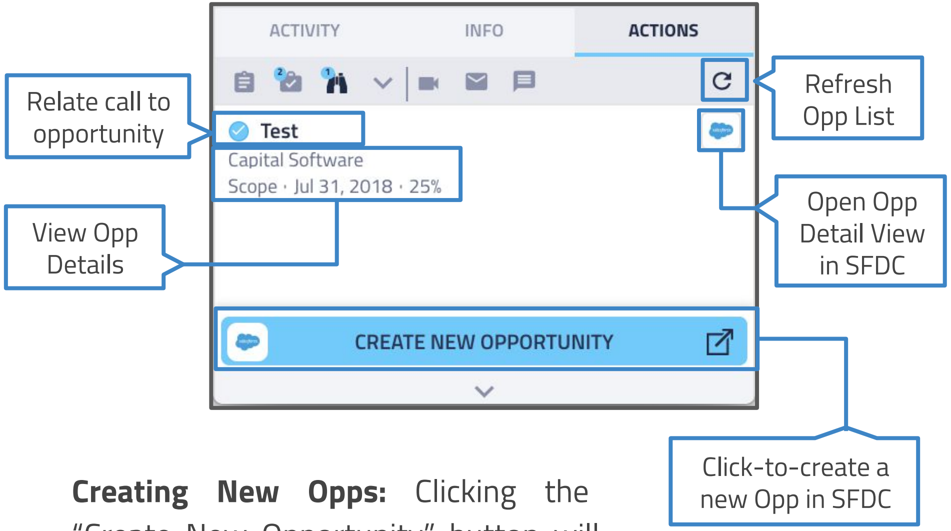
Open Case Detail View in SFDC



Click-to-create a new case in SFDC

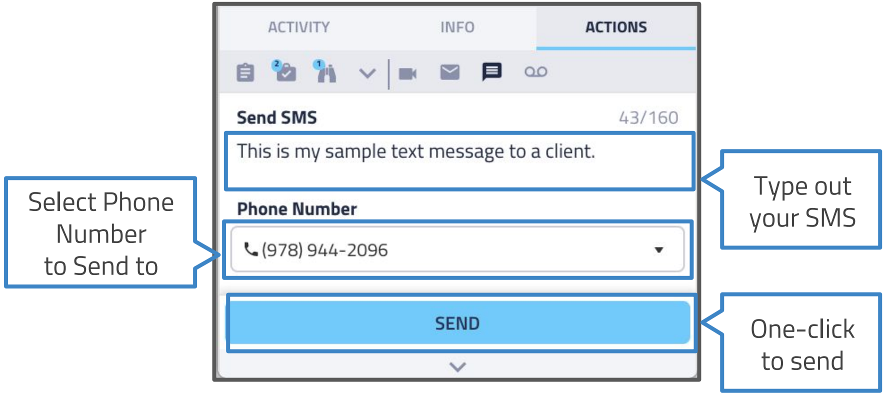
Creating New Cases: Clicking the "Create New Case" button will launch you into your standard Case Creation flow within Salesforce, opening up the new case for you to edit with pre-filled information (i.e. account name).

Action tab - Opportunities



Creating New Opps: Clicking the "Create New Opportunity" button will launch you into your standard Opp Creation flow in Salesforce, opening up the new opp for you to edit with pre-filled info (i.e. account name).

Action tab - SMS/Text Message



Important to know about SMS: Responses from your contacts will come back to you as an email message. When you reply, these will be sent to the contact as a text message via Tenfold. Your admin configures the outbound number that is shown for SMS.

8.1 Data Captured When Logging Calls

Capturing calls in Salesforce is a key capability of Tenfold. Tenfold is uniquely able to log all calls, even when a user is not logged into the CRM, making sure you get credit for all activities and the business has visibility into all calls that are made.

There are 3 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 call was made to
- ❏ Related Record
- ❏ Inbound Number Dialed or VDN/Skill*
- ❏ Link to Call Recording*
- ❏ Customer Journey data*

*Only available on some plans and specific integrations

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 3rd 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)*
- ❏ Business Information (i.e. Employees, Revenue)*

*Only available on some plans and may incur additional fees

8.2 Call Data in Salesforce

Calls are captured in Salesforce as either Tasks or Events depending on your organizations configuration. In either scenario, Tenfold captures data into a standard set of fields on these Salesforce Objects. Here's a breakdown of that mapping:

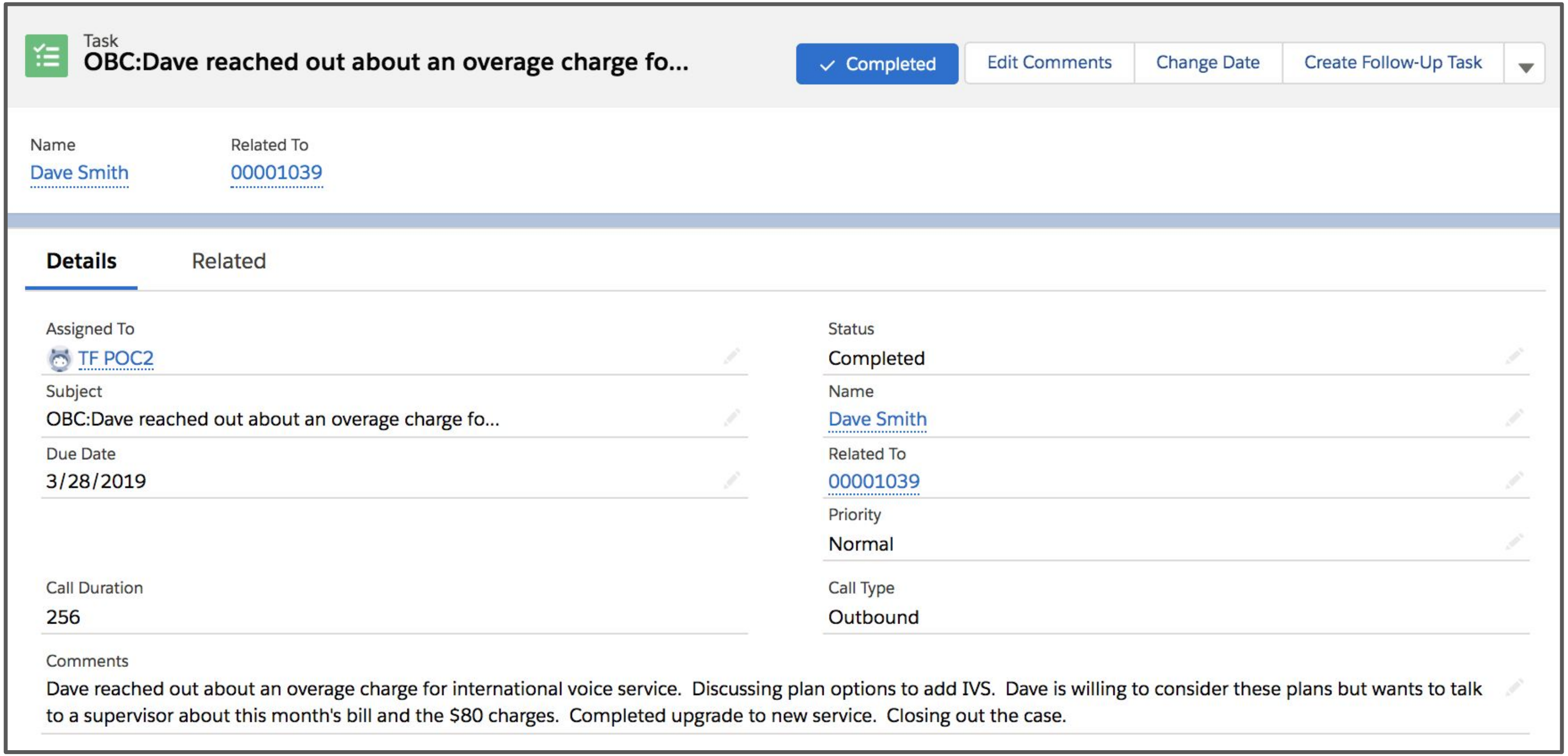
Salesforce Field	Tenfold Data
Name	Matched Record Name
Assigned To	User Making/Receiving Call
Related To	Account Name/Related Object Name
Comments	Notes
Due Date	Date of Call
Call Type	Call Direction
Phone Number	Phone Number
Call Duration	Duration of the Call in Seconds

Tenfold will also automatically set default values in Salesforce tasks for some fields. These include the following:

Salesforce Field	Tenfold Default Value
Type	Call
Priority	Normal
Subject	IBC:/OBC: + " <Notes up to char limit>…"
Status	Completed
Created By	Salesforce API User connected to Tenfold
Last Modified By	Salesforce API User connected to Tenfold

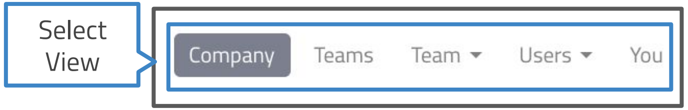
Most of this data is captured automatically with the exception of Notes and related objects (depending on your settings). If you organization is using dispositions, these are captured by selecting the field updates from the Tenfold UI for a call.

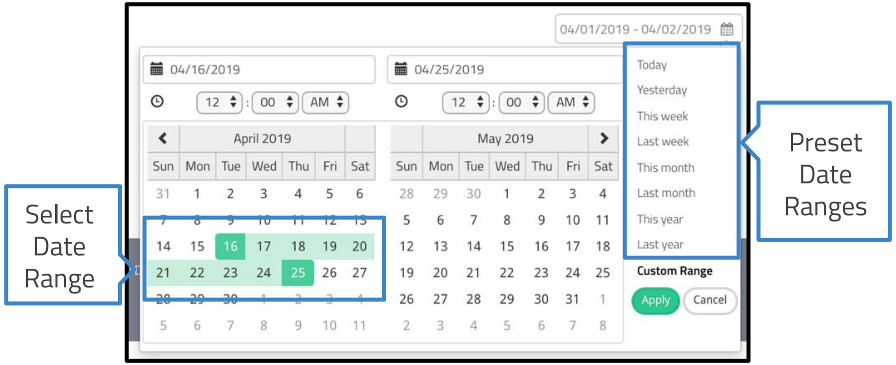
8.3 Example Call Log from Salesforce



9.1 Tenfold Analytics Visibility & 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 your Organization or gather information on how individual Teams or Users are performing. You can also configure the date range. See below:





9.2 Tenfold Analytics Overview

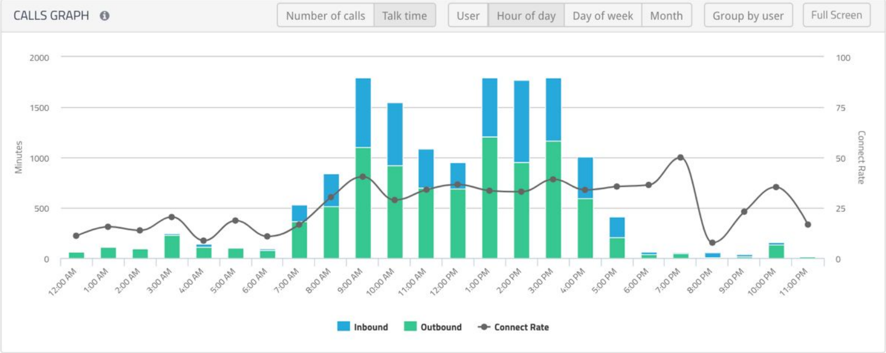
The Tenfold Analytics Dashboard provides several components. This section provides an overview of these items.

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 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. See a visual below:



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.

Note that the thresholds for "Long Calls" and "Connects" are set by your Admin in the Company Settings. See below:

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%
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%

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.

10.1 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. Common issues include:

- ❑ Click-to-Dial not Working
- ❑ Calls not Logging
- ❑ Tenfold UI not Responsive to Calls
- ❑ Not matching (Showing Unknown despite matches)
- ❑ Users not Showing in Dashboard

If issues are only affecting a single user, take these steps:

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

If none of these steps work, contact Tenfold's support team.

10.2 Contacting Tenfold Support

Tenfold offers two levels of support for Customers. Standard Support available between 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 across several channels:

- ❑ Chat with us from the website (or leave a message)
- ❑ Email support@tenfold.com (auto-creates ticket)
- ❑ Call Tenfold's support team at 415-599-1170

Or for less urgent matters, you can reach out to your customer success manager for assistance.

We look forward to supporting you at Tenfold!