tenfold

RingCentral Integration Guide

Table of Contents

Introduction

Audience

This document is directed to customers and prospective customers interested in using Tenfold in an RingCentral environment. Those who will perform the procedures described in this guide should have a basic level of familiarity with RingCentral administration and Tenfold.

Goals

The goal of this document is to provide knowledge, reference, and procedural information necessary to understand a proposed RingCentral/Tenfold integration.

This document is NOT intended as a specific system or network design document. If further clarification is needed, consult with your Tenfold Customer Success Manager (CSM) or Tenfold Support (support@tenfold.com).

Terminology

To ensure a common frame of reference, this guide uses the following terms in conjunction with this RingCentral integration:

- **Click to Dial**: A feature in the Tenfold UI which 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 which agents will interact with for identifying callers, viewing recent activities, saving notes, dispositioning calls, etc.

Customer Responsibilities

You are also responsible for configuring RingCentral system components to support the Tenfold integration.

Integration Overview

RingCentral Requirements

Username (phone number) and password for a RingCentral administrator account

Connecting RingCental to Tenfold Dashboard

1. Log in to your Tenfold Administrator account on the Tenfold Dashboard: https://dashboard.tenfold.com/
2. Select Company Settings and then Phone System.
3. Click on the drop-down menu and select RingCentral Office.
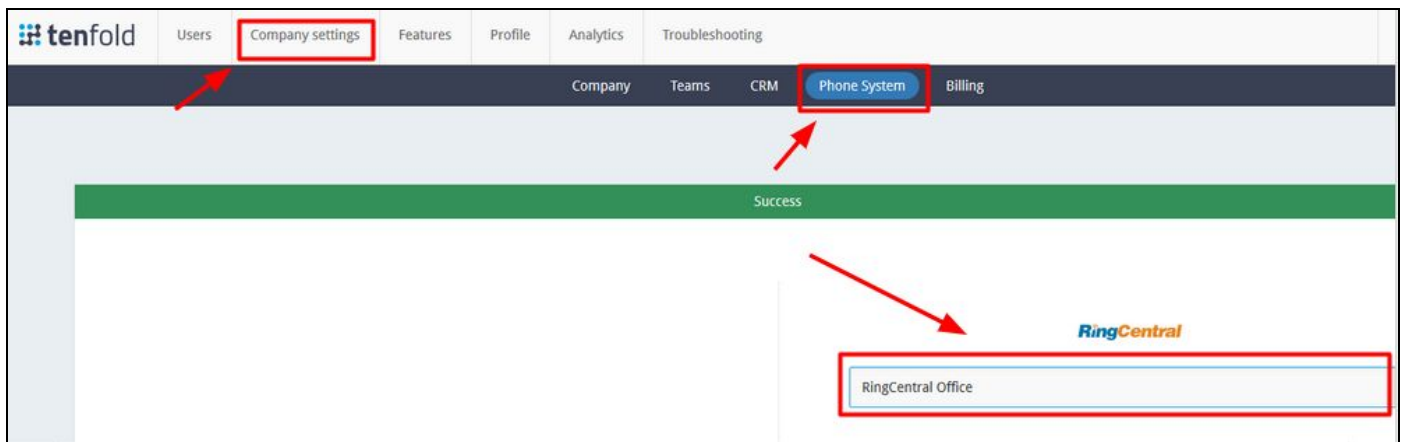
4. Enter the username(phone number) and password for your RingCentral administrator account.
   a. *Note: Add the country code number at the beginning of the phone number. (e.g. `1` for USA or `44` for UK)*
5. Click Save

Adding Extensions to User Accounts as the Tenfold Administrator

1. Log in to your Tenfold Administrator account: https://dashboards.tenfold.com
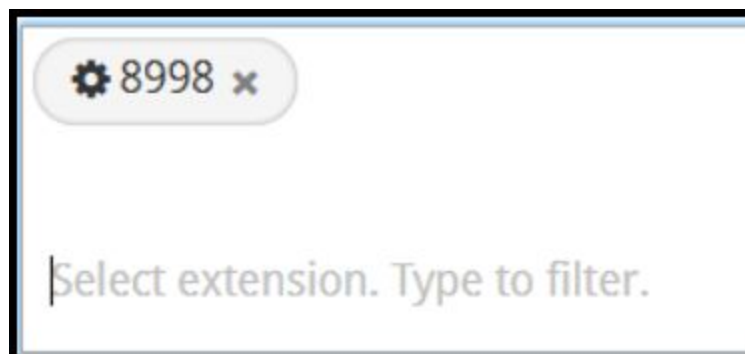2. Click on the Users tab in the Tenfold Dashboard.

3. Click the blue and white button with the plus sign

4. Enter the user's RingCentral extension in the box and select the RingCentral extension from the drop down.
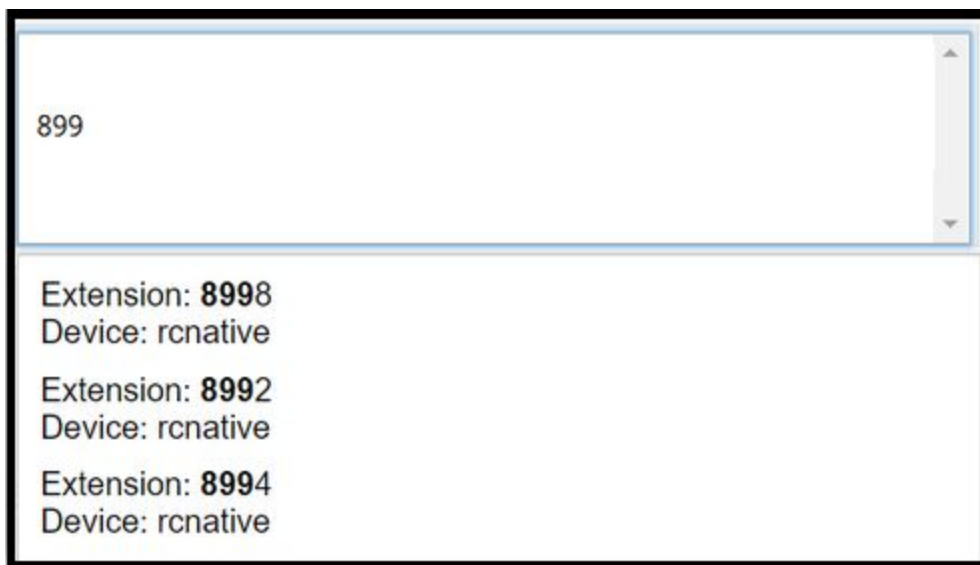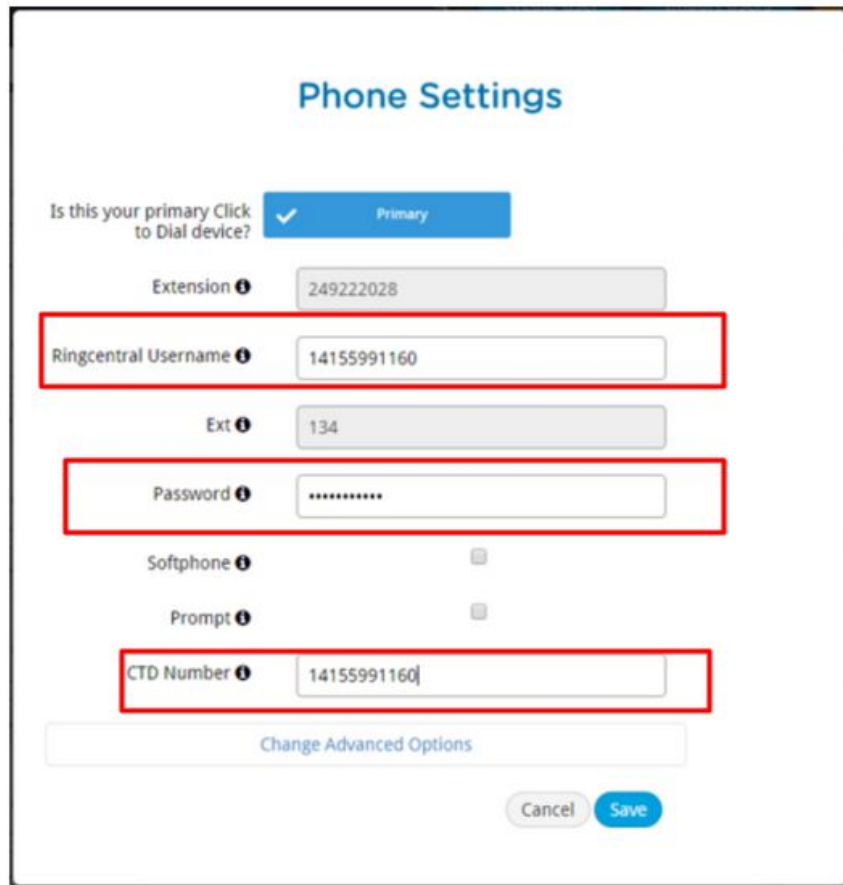

5. Click on the cog wheel next to the extension number

6. In the Phone Settings popup enter the user's RingCentral Username including country code at the beginning, just like was done for the RingCentrals Administrator account

7. Enter the user's RingCentral password
8. In the CTD Number field enter the user's RingCentral phone number including country code at the beginning. Click Save

9. Click Save
10. Test your click to dial functionality with our Click To Dial Test Page: https://www.tenfold.com/support-center/click-to-dial-test-page/

Adding Extensions to User Accounts as a User

1. Log in to your Tenfold account: https://dashboards.tenfold.com
2. Click on the Profile tab in the Tenfold Dashboard.

3. Click the blue and white button with the plus sign

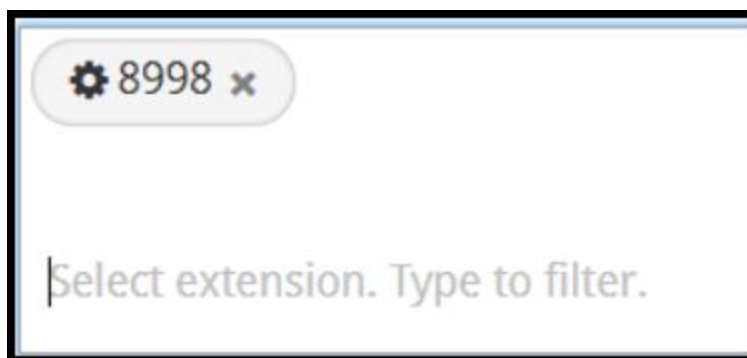4. Enter the user's RingCentral extension in the box and select the RingCentral extension from the drop down.

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Extension: **8998**
Device: rcnative

Extension: **8992**
Device: rcnative

Extension: **8994**
Device: rcnative

5. Click on the cog wheel next to the extension number

⚙ 8998 ✕

Select extension. Type to filter.

6. In the Phone Settings popup enter the user's RingCentral Username including country code at the beginning, just like was done for the RingCentrals Administrator account
7. Enter the user's RingCentral password
8. In the CTD Number field enter the user's RingCentralphone number including country code at the beginningClick Save

9. Click Save
10. Test your click to dial functionality with our Click To Dial Test Page:
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