MegaPath Connector User Guide

Contents

1. Logging into MegaPath Connector

Once a user is invited to join MegaPath Connector, they will be prompted to create a password and download the browser extension. This should keep them logged into the system indefinitely unless they switch computers or log themselves out. If for some reason a user finds themselves logged out, the following steps can be used to log back in.

- Go to https://dashboard.tenfold.com/
- Enter username and password
- Click Login

One way to tell whether or not a user is logged in is by checking the color of the MegaPath Connector icon in the top right corner of the browser. When a user is logged in, the icon will appear blue. If the user is not logged in, the icon will appear gray.
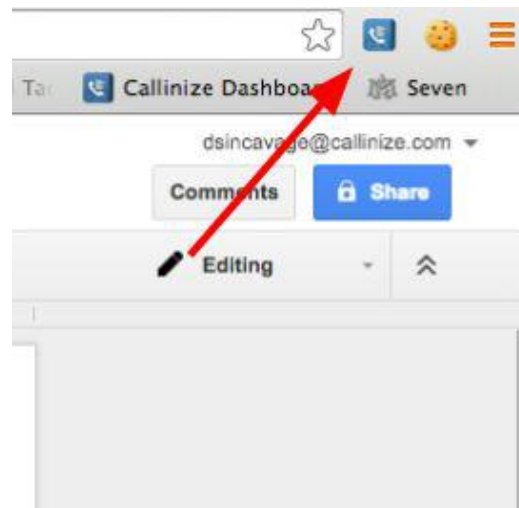
2. Inbound Calls with MegaPath Connector - Single Match

When an inbound call comes in, MegaPath Connector will take the phone number of that call and search it against all of the phone number fields for every record inside of Salesforce. In the event that there is a single matching record inside of the system, the user will see a Popup that contains the name of the Lead or Contact who is calling, the name of the Account they are linked to and all of the recent interaction history with that individual.
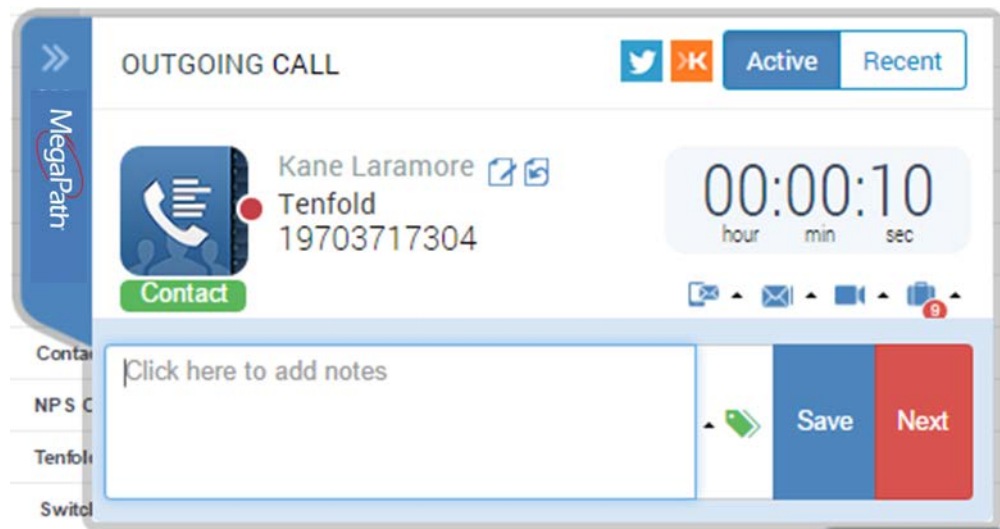
- The name of the lead/contact above can be used as a clickable link to take the user directly to the lead/contact record inside of Salesforce.

- The name of the account (Tenfold) above can be used as a clickable link to take the user directly to the account record inside of Salesforce.

- The red dot above is an indication of whether or not the call is still connected. The following color schemes apply:
    - Yellow - Call is ringing (not answered yet)
    - Green - Call is connected
    - Red - Call has been ended

- The timer on the right hand side will display the amount of time the call has been connected. It will stop counting once you have hung up the call. This duration will be automatically logged inside of Salesforce, so you know how long each call lasted and can run reporting around time spent on the phone.

- The middle section with the green calendar and call notes is your activity history section. This section will allow you to scroll through all of the recent interactions that anyone at your company has had with the lead/contact/account. For each past activity, you will be able to see the type of activity, who on your team they interacted with, when that interaction occurred and what notes were taken on that interaction. If you hover over this section, the full notes from that particular activity will be displayed (see below)

- Notes can be added on the call in the text section at the bottom where it says "Click here to add notes." If no notes are taken, the call will still be logged inside of Salesforce with the comment "Automatically Logged by MegaPath Connector." If notes are taken, the comment section will contain the full notes that the user took on the call and the subject line will contain the beginning of those notes for easy reference when looking at activity history on a record.

3. Inbound Calls with MegaPath Connector - Multiple Match

In some cases, there will be multiple different records that match the phone number of the person who is calling you. In these cases, MegaPath Connector will display all of the matching records and provide you with a text box that you can use to filter down the results by either name or account name.
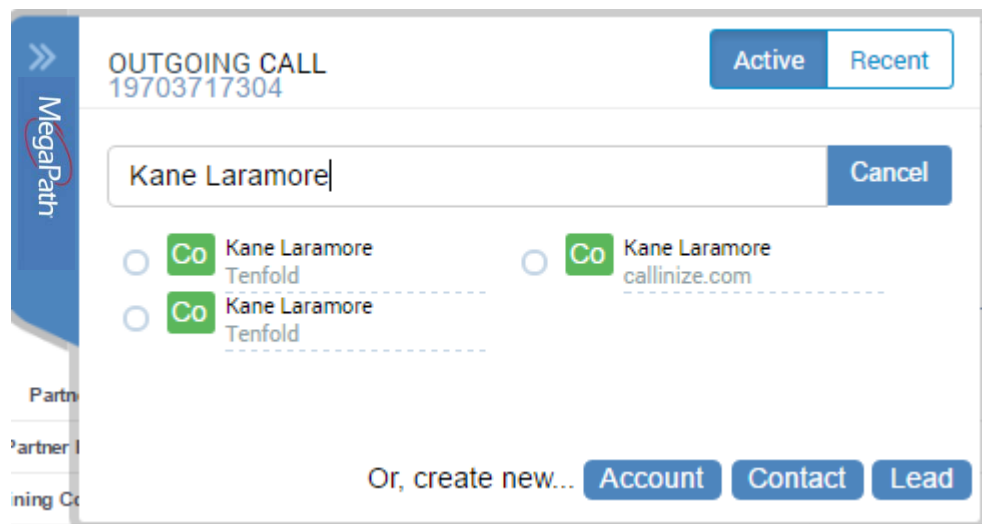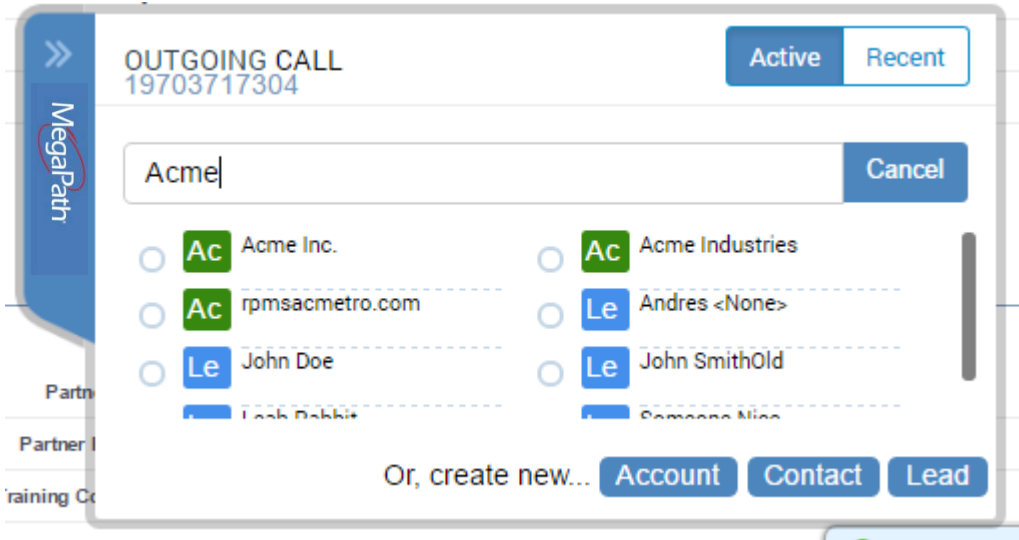

In the example above, the filter results section can be used to type in a name or account name to filter down which record you would like to work off of.
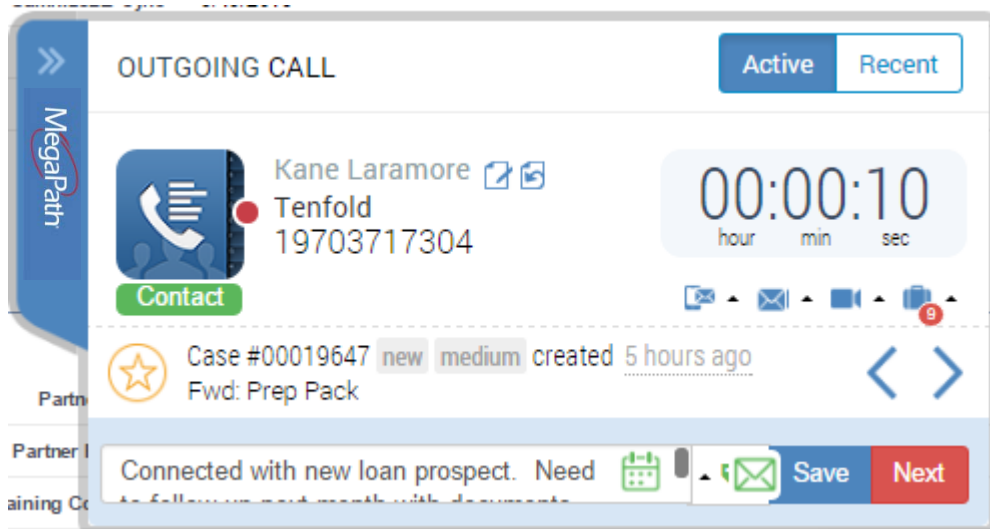
Filter by Name:
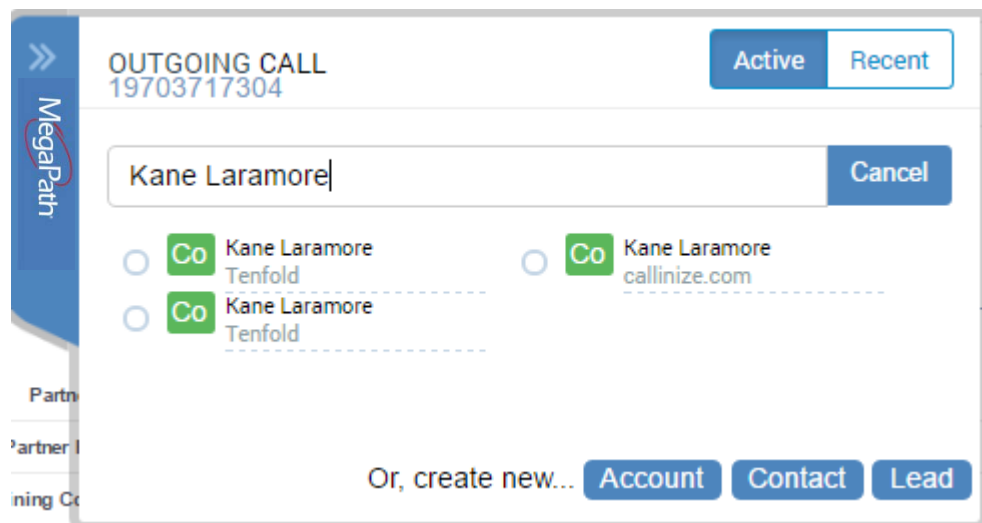
Filter by Account Name:

Once you find the correct match, you can simply click on the circle next to that record and it will pop up with the single match screen (see below):


Once on the single match screen, all of the same workflows apply as the instructions in section 2 of this user guide.

4. Inbound Calls - No Match

Sometimes you will receive calls from a number that does not yet exist inside of your system. There are typically two different scenarios:

    A. The person does exist in your system but they do not have that particular phone number attached to their account (Example: They call from their cell phone and you only have the office line attached to them)

    B. The person does not exist in your system - they are a new lead/contact
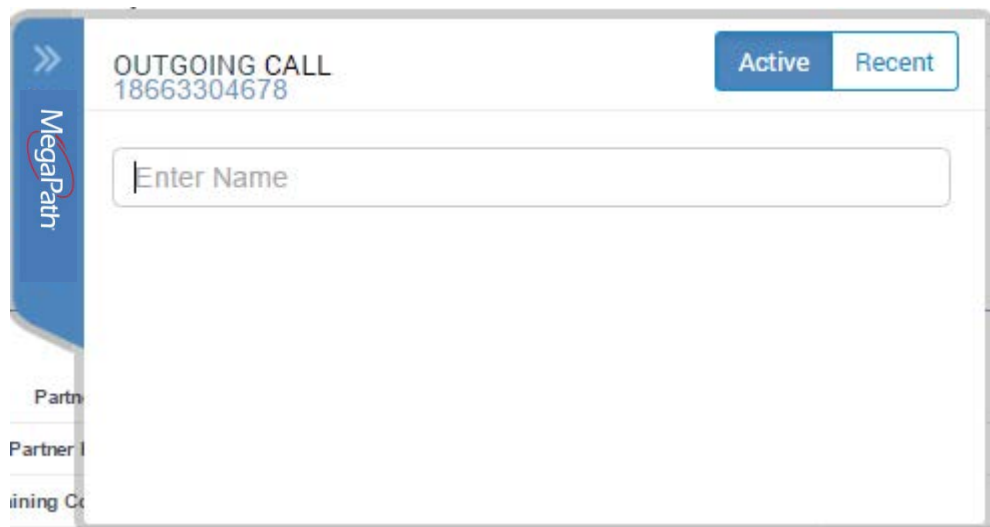
In order to determine which of these cases you are running into, our popup will display "No Match Found" and allow you to search for an existing match.

In order to search, simply start typing the name of the contact, lead or account: In the above example, if Smart Choice Communications is the correct company, I can simply click on the circle next to that account and the new phone number will be added to the record. I will then be taken to the single match screen for that account and the same instructions from section 2 will apply.
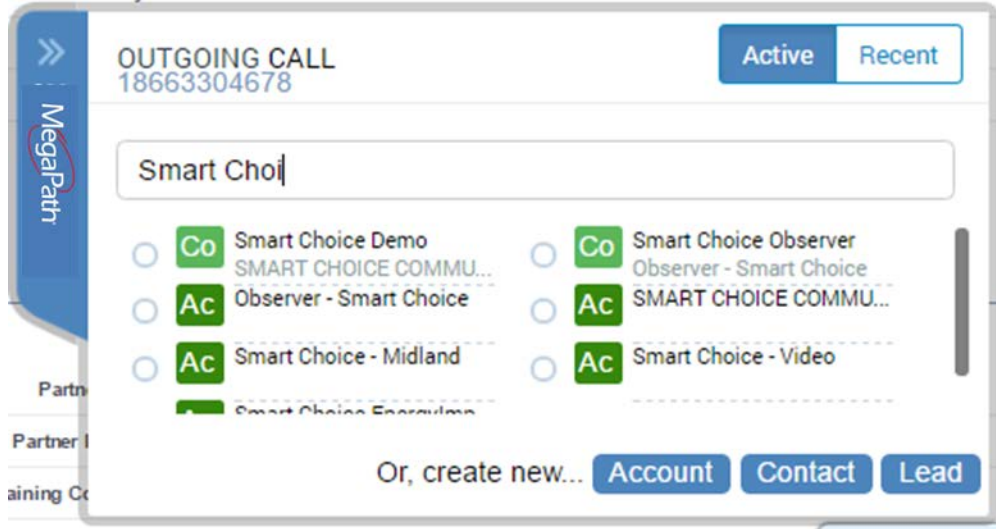
If Smart Choice Communications is not the correct company, then I can use the buttons at the bottom right corner to create a brand new lead, contact or account directly from the popup.

5. Click to Dial with MegaPath Connector

For making outbound calls, MegaPath Connector allows users to simply click on phone numbers on any page in their browser to dial those numbers. This means they no longer need to manually dial phone numbers in order to call out.

Here's an example from inside of Salesforce:
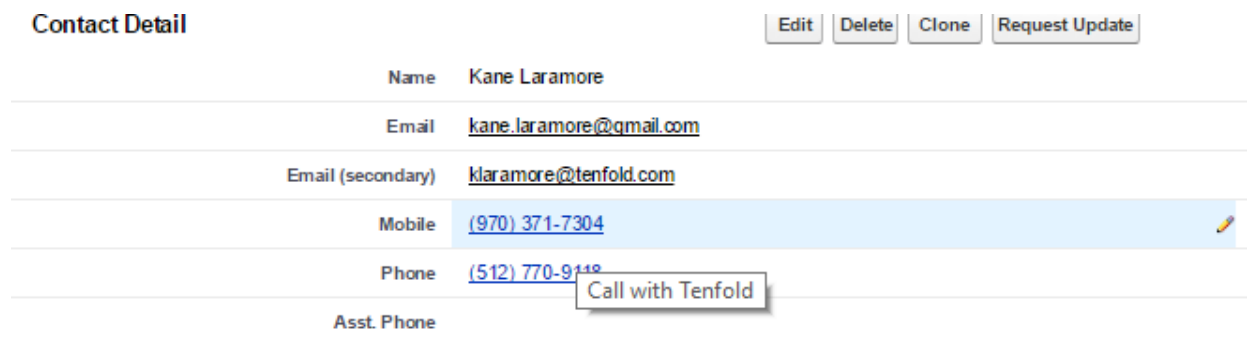
Notice that all of the phone numbers show up as clickable links instead of plain text. When you hover over any of the phone numbers, you will see "Call with MegaPath Connector." The same will apply for phone numbers that show up on any browser tab.

Click to Dial Context - One benefit of using click to dial is that the system will recognize the context in which you click on a phone number. This means that if there are multiple records in the system with that same phone number, it will know which record your click is related to and act as if there is only a single match to that record.

6. Outbound Calls

When an outbound call is placed, either through Click to Dial or by manually dialing a phone number, the popup will appear in the bottom right corner just like it does on inbound calls. Once the call occurs, the same process as shown in Sections 2, 3 and 4 will apply for outbound calls.

7. Taking Notes with MegaPath Connector

Once a user is on a call, whether it is an inbound call or an outbound call, the user can take notes for that call that will be saved in the comment section of the call activity record. These are the notes that will show up the next time the lead, contact or account calls or is called by one of your users.

To take notes, simply click on the notes section and type your notes (see below).
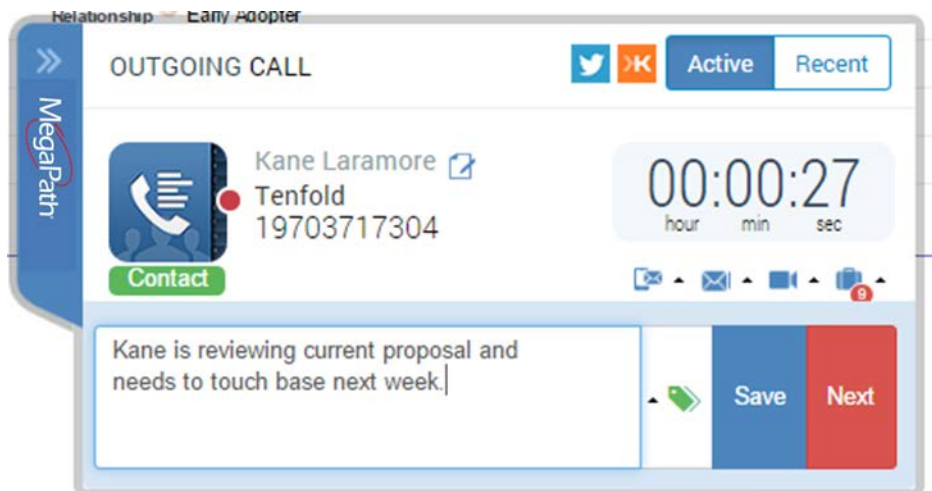
When taking notes, you can also use our easy task creation feature that uses natural language processing to identify your intent to follow up with someone at a specific time.
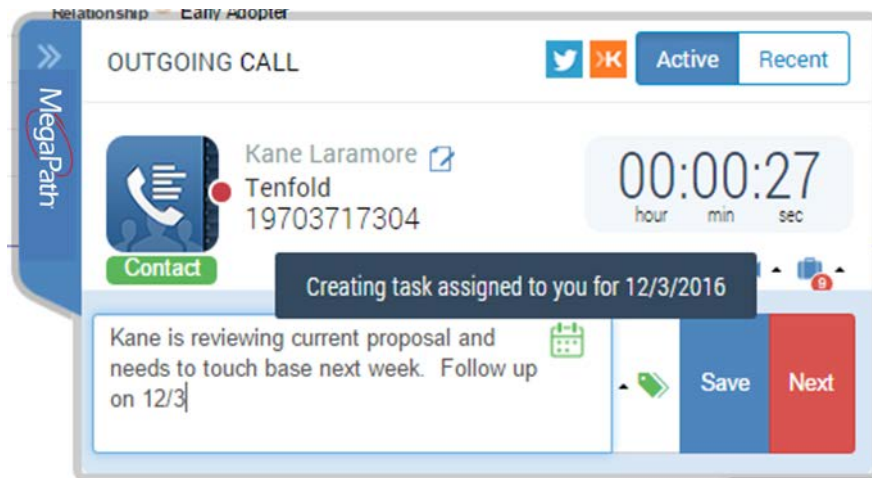
In the above note, simply by typing in "Follow up on 12/3" MegaPath Connector recognized that I wanted to reach back out on 12/3 and created an automated task to remind me to do this inside of Salesforce. The green calendar that pops up in the bottom right of the notes section is an indicator that a task will be created. When you hover over that calendar, you will see the information about your task as shown above.

## 8. Additional Natural Language Processing Syntax

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

Examples
"Remind me tomorrow"
"Remind me on Saturday."
"Remind me in 1 week"
"Remind me next month"
"Remind me on Wednesday"
"Call 01/29/2016"
"Follow up 1/29/2014"
"Follow up in two weeks"
"Follow up in a week"
"Follow up next week"
"Call tomorrow "
"F/U tomorrow"
"Call before COB."
"Call at beginning of next year."
"Call beginning of next month."
"Call beginning of next week."

"Retry tomorrow."
"Try Again tomorrow."

You can also easily let colleagues know about an interaction you had whether you just want to notify them or you have some sort of action item for them to take care of.
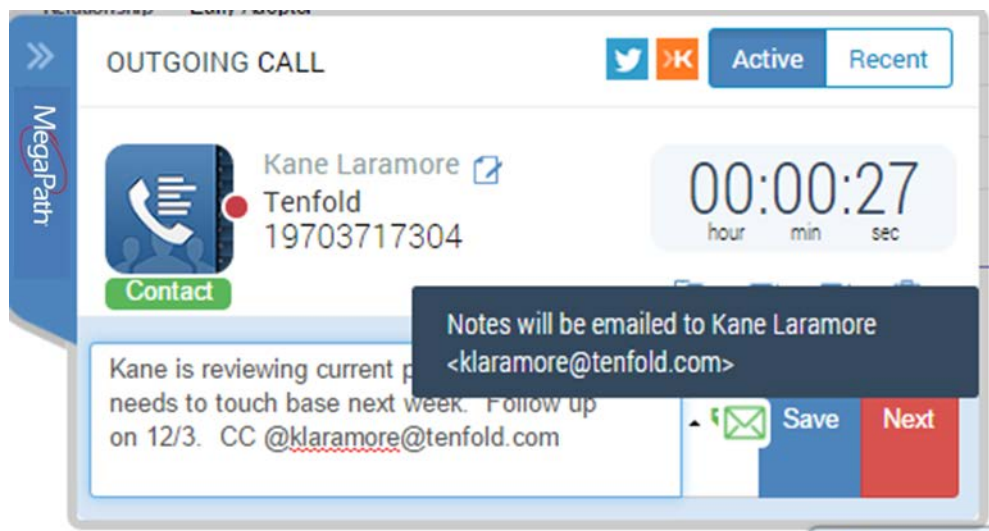

In the example above, simply by using the @ symbol, a user is able to pull up a list of the other CRM users at my company. The user can type in their name to filter that list down. When the user selects someone from that list, that individual will receive a copy of the notes taken on the call and a direct link to the record inside of Salesforce.
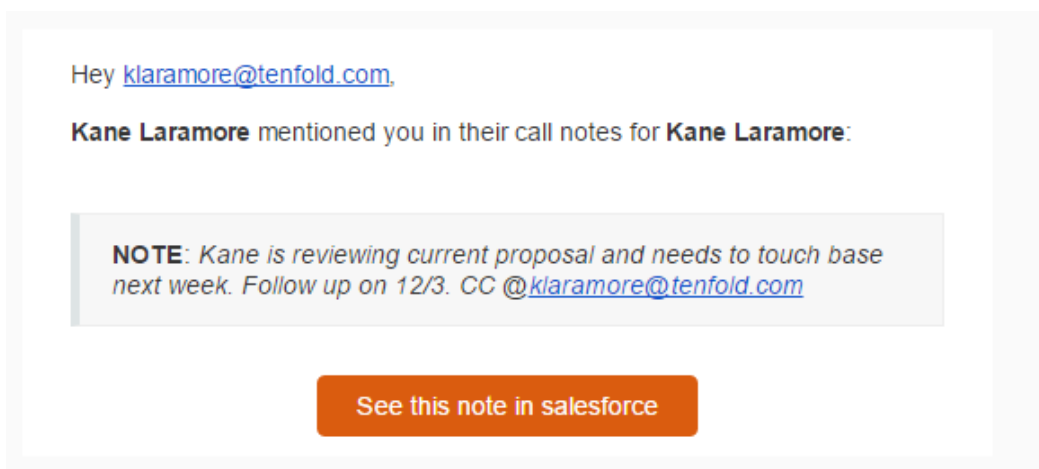
The individual copied on the note will receive an email like the one above and can simply click on the orange button to immediately access the record for more information or to take the action that has been requested of them.

9. Saving your Notes

Once the call has been completed, the popup will stay open to allow a user to finish up their notes. Once the full notes have been taken, the user can save their notes by simply clicking on the "Save" button in the bottom right corner of the popup. Once the notes are saved, a notification window will show in the top right corner of the screen confirming the actions that have been taken (see below).
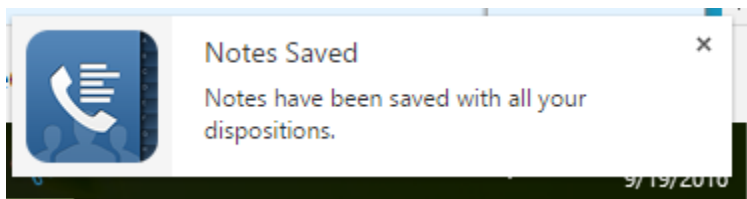
10. Automatic Logging to Salesforce

Calls will be automatically logged to Salesforce whether or not the user takes notes or interacts with the popup. They are logged as completed activities on the correct record.

Above you can see an example of a logged call inside of Salesforce. The logged activity will automatically tell you the related record, the type of activity (Call), who on

your team made or received the call (Assigned to: Kane Laramore), the notes from your call (See comments section), the date of the call (9/19/2016), the duration of the call in seconds (Call duration: 27), the direction of the call (Call Type: Outbound)

The subject line will contain OBC for Outbound Call or IBC for Inbound Call and the notes taken, up to the character limit, for easy reference when looking at activity history.

Since all of this information is automatically logged, organizations can set up custom reports in Salesforce using these fields.

11.   MegaPath Connector Analytics Dashboard

In order to access the dashboard, managers will want to save the following link as a bookmark in their browser for easy access to call analytics at any time:

https://dashboard.tenfold.com/analytics
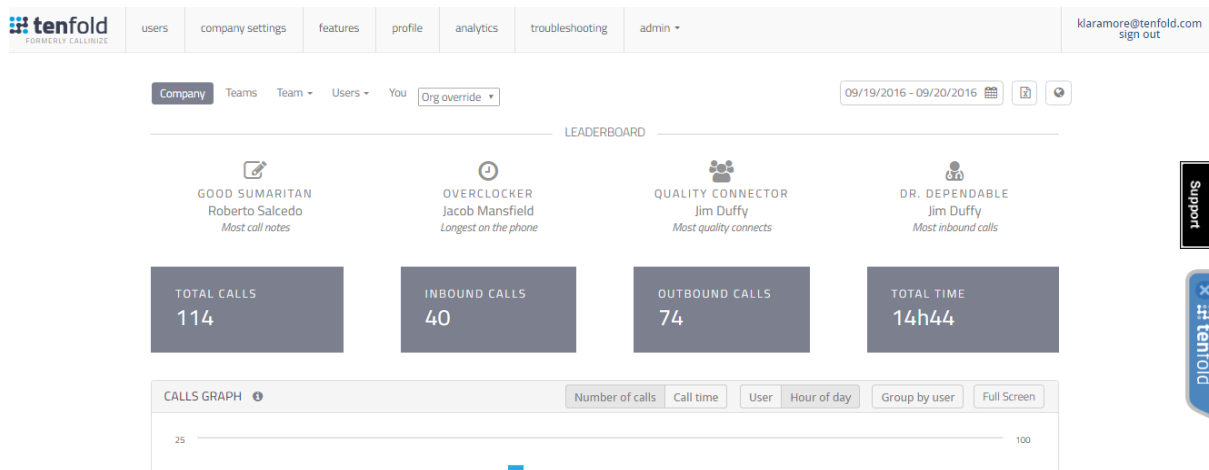
If you are not logged in, it will prompt you to login before providing access.

The first section of the dashboard will allow the user to decide the date range for which they would like to see analytics. Using the dropdowns on the right-hand side, users can select a preset range (today, yesterday, this week, last week, this month, last month, this year, last year) or a custom range using the calendar field. Once a date is selected, the information will update to display call activity for the selected time period.

The first section of the analytics (shown above) will display total number of calls made, total outbound calls, total inbound calls and a leaderboard that will show which members of the organization are performing at the highest level in certain areas.

The second section of the analytics will allow you to look at call volume for that time period by user, hourly, daily, weekly or monthly. The blue bar will show outbound call

TOTAL CALLS	INBOUND CALLS	OUTBOUND CALLS	TOTAL TIME
541	149	392	60h28
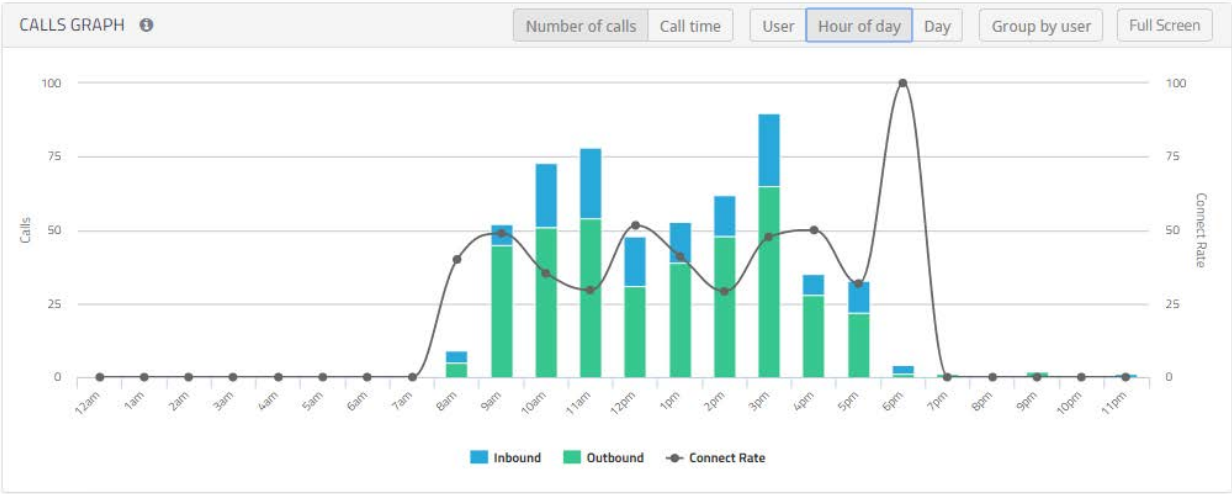
volume, while the green part of the bar shows inbound call volume. The total height of the bar shows the complete call volume. On the second chart, you see call volume displayed hourly throughout that time period. This allows you to see how call volume changes throughout the day for your company across any given time period and can help with workforce management questions.

The third section is the User Table which presents all of this data in a table and allows you to see call volumes by user for the total number of calls, total time spent on the phone, average time spent on each call, total number of times that notes have been taken on the call and the same information broken down by inbound vs outbound call volume.

		Totals				Leads		
Name	Calls	Time	Avg Time	Notes	CRM	Calls	Connects	Emails	Avg Resp Time
Adolfo Espinola	77	6h12	4m50	14	77.9%	0	0	0	-
Roberto Salcedo	76	6h53	5m26	11	50.0%	0	0	0	-
Jim Duffy	74	8h09	6m37	13	74.3%	0	0	0	-
Kane Laramore	61	6h28	6m22	7	86.9%	0	0	0	-
Sarah Hall	54	3h49	4m15	9	98.1%	0	0	0	-
Blake Given	50	2h14	2m40	0	68.0%	0	0	0	-
Jacob Mansfield	46	9h15	12m04	0	60.9%	0	0	0	-
Jonathan Hackworth	44	5h16	7m10	1	59.1%	0	0	0	-
Luke Dawson	30	7h11	14m22	9	100.0%	0	0	0	-
Kendrick Gardner	16	3m04	11s	0	62.5%	0	0	0	-
Lea Kreimes	11	4h28	24m26	3	90.9%	0	0	0	-

12.   Support

For any questions about functionality and features, or issues that need to be addressed, you have several options for support.

Support documentation can be found in the Voice Learning Center at
https://www.megapath.com/support/voice/administrator-resources/

You can also contact Support by calling 877-611-6342 or place support tickets in the support section of the MegaPath Customer Portal located at https://my.megapath.com