

### RAINBOW CRM BRIDGE – ZOHO CRM DEPLOYMENT GUIDE

# Rainbow CRM Bridge





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# 1 Document History

Edition	Date	Changes / Comments / Details				
01	18/06/2020	itial Deployment Guide				
02 18/11/2021 Section 3 A new section has been added and remaining sections have renumbered.						
03	Legal Notice has been updated. <b>Section 4</b> Screenshots have been updated.					
04	13/01/2023	Legal Notice has been updated. Section 5 Screenshots have been updated. Section 6 Section about known limitations has been updated.				



## 2 Introduction

Rainbow CRM Bridge acts as a middleware that connects third party CRMs e.g. ServiceNow, MS Dynamics 365, Zoho etc. with ALE Rainbow. Rainbow CRM Bridge is hosted in ALE Cloud and works inside third-party CRMs as an integrated component.

The integrated version of Rainbow powered by Rainbow CPaaS APIs, eliminates the need of a separate desktop application and brings the power of Rainbow inside the everyday business applications like ServiceNow.

Rainbow CRM Bridge uses the CPaaS platform to pull Rainbow user details e.g. Contacts, Conversations and Bubbles. This enables the logged in user to receive Rainbow Calls, Office PBX calls and perform variety of actions including Audio and Video calls.

For more details on Rainbow CRM Bridge, please refer to the datasheet.

## 3 Rainbow Subscription & PBX Configuration

Before integrating Rainbow CRM Bridge with Zoho, you must ensure that following configuration requirements related to telephone system are fulfilled. Integration with Zoho CRM can be achieved without these configurations but they are vital for provisioning of telephony capabilities in Rainbow CRM Bridge.

#### 3.1 Equipment Configuration

Rainbow CRM Bridge supports all available "Server Type" options such as OmniPCX Office (OXO) Connect, OmniPCX Enterprise (OXE) and 3<sup>rd</sup> Party PBXs. All supported telephone systems along with their supported versions are listed in the below table:

Telephone Systems	Supported Versions
OmniPCX Enterprise (OXE)	v12 or higher
OmniPCX Office (OXO) Connect	R3.x or higher
CISCO Unified Communication Manager (CUCM)	v9.x, 10.x, 11.x, 12.x
Mitel MiVoice	MiVoice 250
NEC	iS3000, iS4000
Asterisk	v11.21.1, v11.21.2, v11.21.3, v16.x, v17.x
OpenScape	OpenScape 4000

'Activate webRTC Gateway' option must be enabled if you intend to use Rainbow CRM Bridge application for VOIP calls. For more information on this, please refer to the following links:

https://support.openrainbow.com/hc/en-us/articles/360017561039-Manage-a-PBX-Equipment-Associated-to-a-Company

https://support.openrainbow.com/hc/en-us/articles/360019337180-WebRTC-gateway-installation-andconfiguration-for-third-party-PBX

For OmniPCX Enterprise and OmniPCX Office Connect, CCCAgent application must be setup. However, for other telephone systems (CUCM, Mitel MiVoice, NEC and Asterisk), Rainbow CTI & Media Bridge application must be setup.

TAPI, CSTA, SIP Trunk and other PBX specific licenses are essential pre-requisite for setting up CCCAgent and Rainbow CTI & Media Bridge application. Please check with your telephone system vendor for licenses status and their activation.



## 4 Setting up Integration with Zoho CRM

Open <u>https://developer.zoho.com/</u> and login using Zoho credentials.

It will take you to the home screen. Please click **Start building** button in Sigma section.

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	V	EXTENSION PLATFORM Sigma Extension Building Platform for Zoho applications Start building		INDUSTRY SPECIFIC SOLUTIONS Vertical Solutions Build industry specific, rebranded solutions that packages functionality available across different Zoho products into one Vertical Solution. Start building				
		CUSTOM APPLICATIONS Zoho Creator Use Zoho Creator to quickly build custom web applications that cater to every client need. Start building	ΖΟΗΟ ΑΡΙ	APPS & INTERGRATIONS REST API Build packaged Integrations for Projects and sell them in Zoho Marketplace Start building				
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Click New Extension button.

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Fill in the required fields and select "Zoho CRM" icon.





Click 'Save as Draft' button.

A new page will open. Select Connected Apps from left menu and enter data in the form fields.

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Click Save button. Next, select Telephony from left Menu and enter Call Center Name.



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< Back	Telephony		
ZOHO RCB			
BUILD	Telephony widget integrates and embeds	call center or telephony application inside Zoho CRM	🖉 💿 Help
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🔝 Custom Properties	SandBox URL	https://zoho.openrainbow.io/ #/	
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Enter "#" in Sandbox URL extended box and click **Save** button. You can test your extension by clicking button on right top.



Next, Click **Publish** link from the left menu and click **Publish** button to publish the extension.

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Add Developer		
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#### Click **Confirm** button.

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This will provide the URL for accessibility.

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< Back	Extension Details		Your extension is successfully published
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RCD Integration with 20110			https://crm.zoho.com/market/installPrivatePlugin.do?portalName=suhaibahmac
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Select the option List this extension in the Zoho marketplace.

*Note:* Please copy the URL as it will be required to install this extension to any Zoho CRM Instance.

## 5 Installation of Rainbow CRM Bridge Extension in Zoho CRM

Login to Zoho CRM, paste the URL of the extension into the URL bar (from the last step), and press Enter. It will add the RCB extension into the CRM Instance. Refresh the page and the **Rainbow CRM Bridge** widget will pop-up as shown below:

Welcome to Rainbow CRM Bridge
Rainbow"
Please enter the email address associated with your Rainbow account
Email address *
Password
Password *
Connect
Keep my session alive
Don't have an account? Signup!
Learn more about Rainbow Copyright © 2023 - ALE International

Provide credentials for your account and then click on Connect button. Following screen is displayed when you are successfully logged into Rainbow CRM Bridge extension.

2	Q People, conversations, incidenti;
	Communicate, Interact and Collaborate with your Customers and Team members



## 6 Known Limitations

This section contains all the limitations applicable on Rainbow CRM Bridge when used specifically for Zoho.

1. When display language is changed from English to any other language, Call Type (Inbound or Outbound) in the call logs is not translated because Zoho CRM uses these specific keywords (Outbound/Inbound) for Call Type regardless of the display language.



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