

RAINBOW CRM BRIDGE – HUBSPOT CRM DEPLOYMENT GUIDE

Rainbow CRM Bridge



Rainbow™

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1 Document History

Edition	Date	Changes / Comments / Details
01	10/10/2023	Initial Deployment Guide created
02	23/05/2024	Section 3.4 Title of the section has been updated. Details about extracting authorization information have been added.

2 Introduction

Rainbow CRM Bridge acts as a middleware that connects the third-party CRM, HubSpot CRM, with a range of ALE and OEM telephone systems. It is hosted in the ALE Cloud and works as a browser extension of the CRM.

A browser extension creates a seamless user experience that improves employee productivity and customer service at the same time.

It fetches Rainbow contact information and provides additional functionality such as text conversations, fetching CRM contact information on incoming calls, dialing out to CRM contact phone numbers and call history.

3 Getting Started

In order to use Rainbow CRM Bridge on your computer, you have to install and configure a browser extension in Google Chrome.

Please follow the process described in the below sections to install and configure the extension.

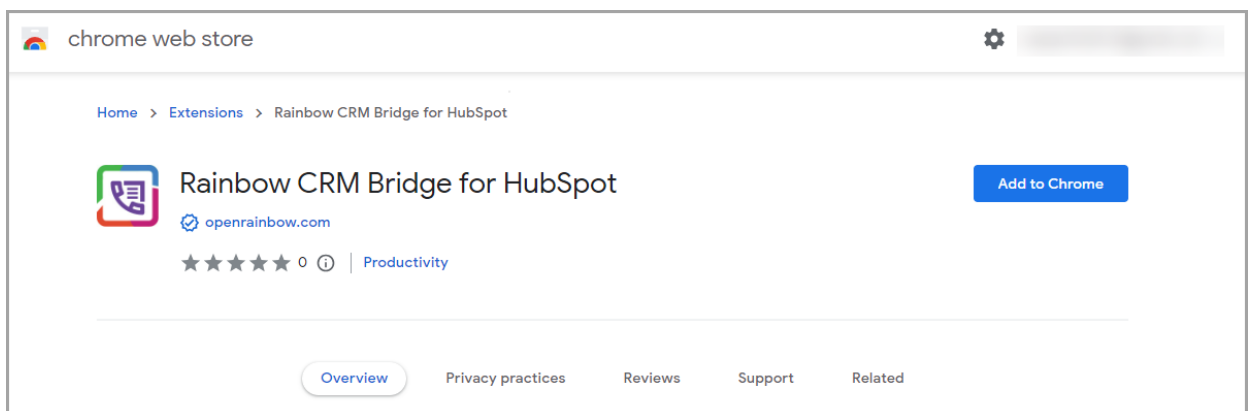
Note: Please perform the below-described process by using Google Chrome browser.

3.1 Installing Browser Extension

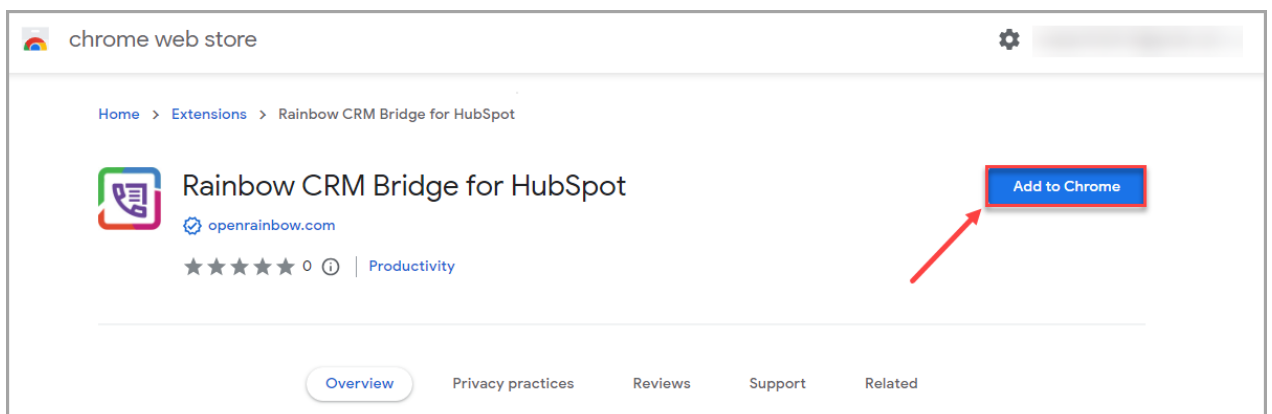
1. Use the below web address to access **Rainbow CRM Bridge for HubSpot** extension in Chrome Web store:

<https://chrome.google.com/webstore/detail/rainbow-crm-bridge-for-hu/empnokmbbkhefagacpkcklmhboijnbco>

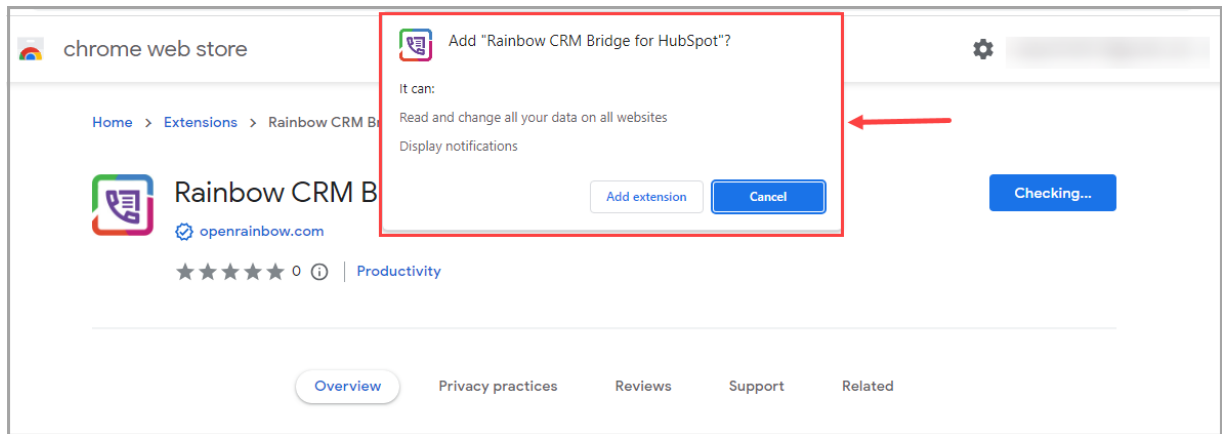
Following page is displayed:



2. Click on **Add to Chrome** button as highlighted below.

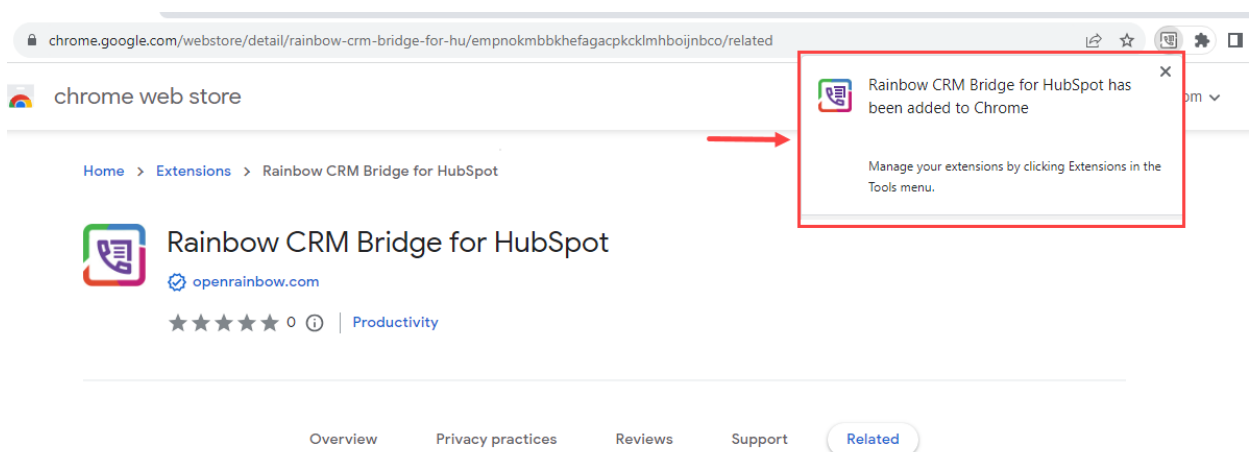


Following pop-up is displayed:




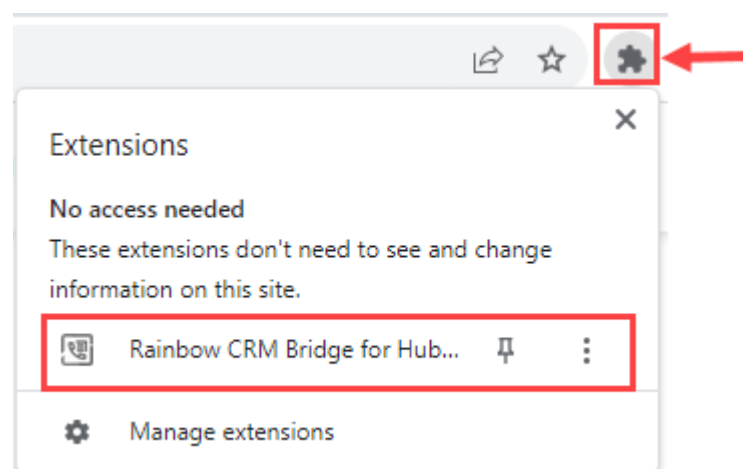
3. Click on **Add Extension** button to start the installation process.



Following pop-up message is displayed once installation is complete:

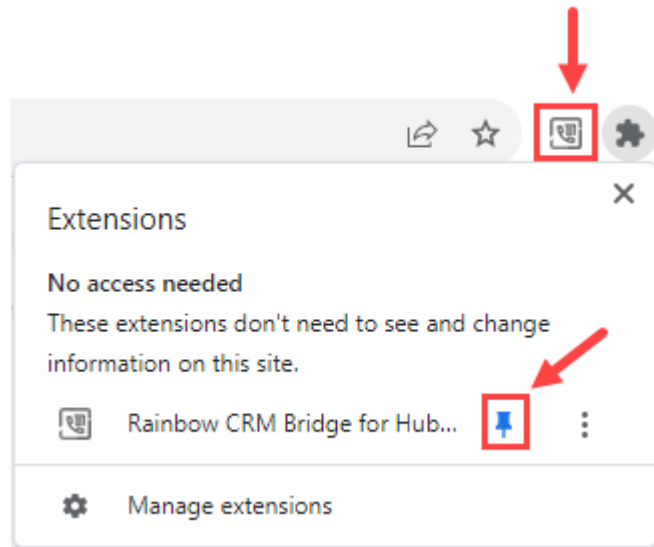


3.2 Configuring Browser Extension for the first time

1. Click on the  icon in the top right corner of Google Chrome. **Rainbow CRM Bridge for HubSpot** extension is displayed in the drop-down menu as highlighted below:





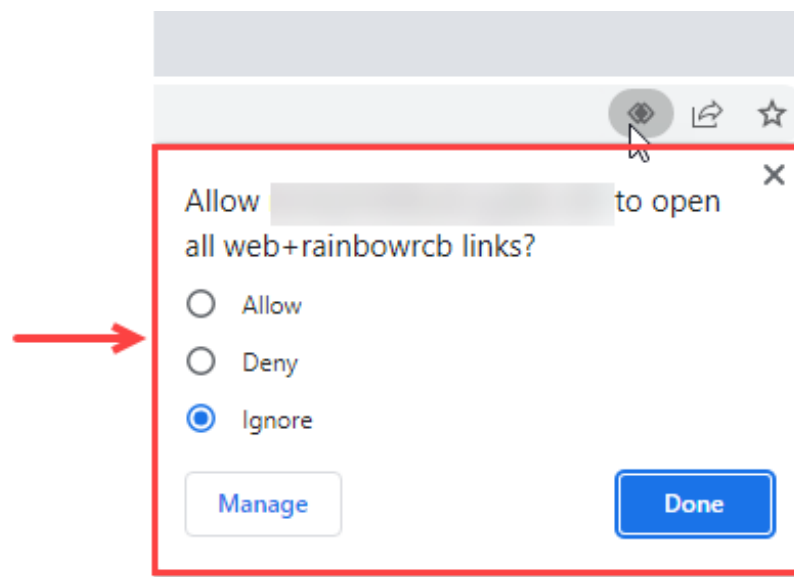
2. Click on the  icon displayed next to the extension. This action displays the extension next to the address bar in the form of  icon as highlighted below:



Note: Rainbow CRM Bridge for HubSpot extension will function only when the agent is logged in to HubSpot CRM.

3.3 Log in HubSpot CRM

1. Please Log in to HubSpot CRM.
2. An icon  shows up in the in the address bar of Google Chrome once you are successfully logged into HubSpot CRM. When you click on the  icon, following drop down menu is displayed:




3. Select **Allow** option and then click on **Done** button as shown below:

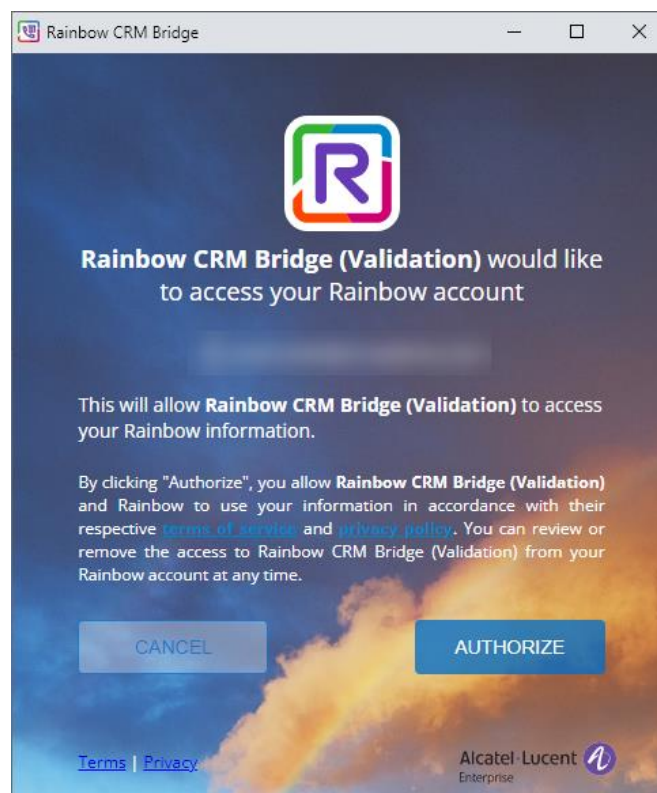


4. Press **Ctrl+F5** from your keyboard to refresh the browser.

3.4 Browser Extension – Starting up & SSO Configuration

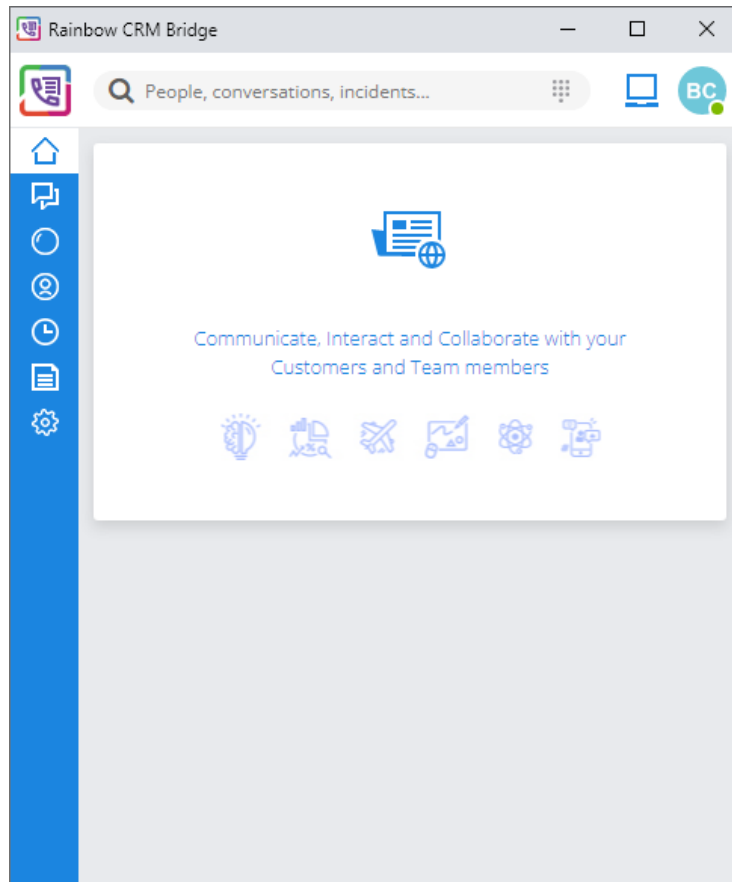
Startup **Rainbow CRM Bridge for HubSpot** extension by clicking on the  icon available next to the address bar.

Following window is displayed when you open the extension for the first time:

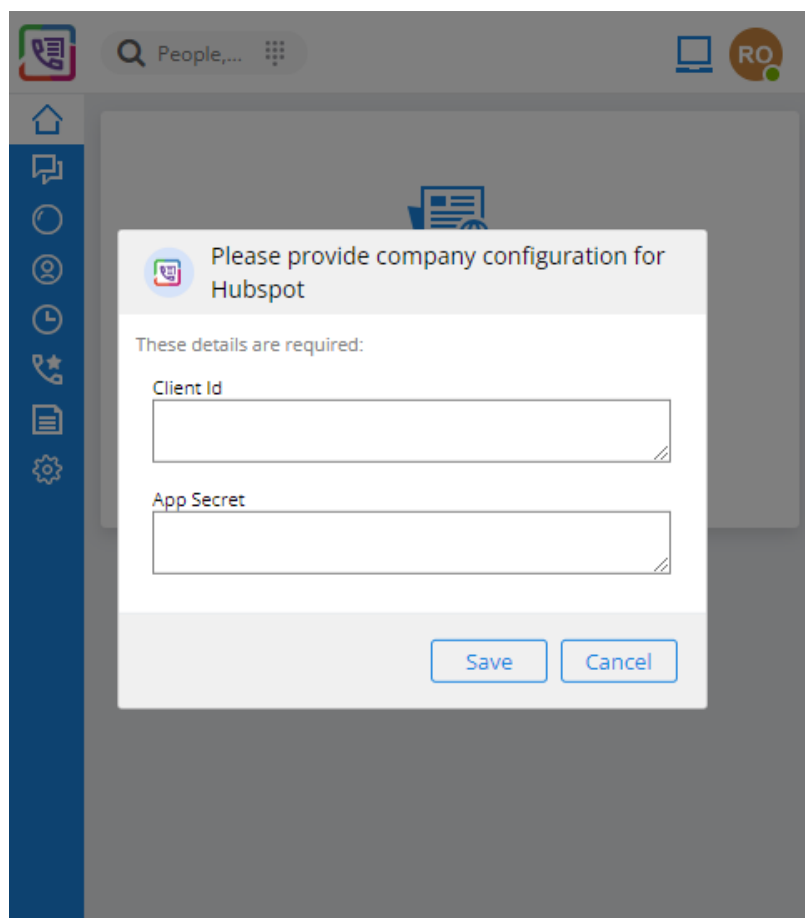


Click on the **Authorize** button and you will be logged into the **Rainbow CRM Bridge**.

Following screen is displayed in the chrome extension after successfully logging in:



If HubSpot API has not been configured then following pop-up is displayed when you click on **Authorize** button:



Following information has to be provided:

- **Client ID:** Please provide Client ID in this field. In order to extract this information, see [HubSpot API Configuration](#) section.
- **App Secret:** Please provide Client Secret in this field. In order to extract this information, see [HubSpot API Configuration](#) section.

3.4.1 HubSpot API Configuration

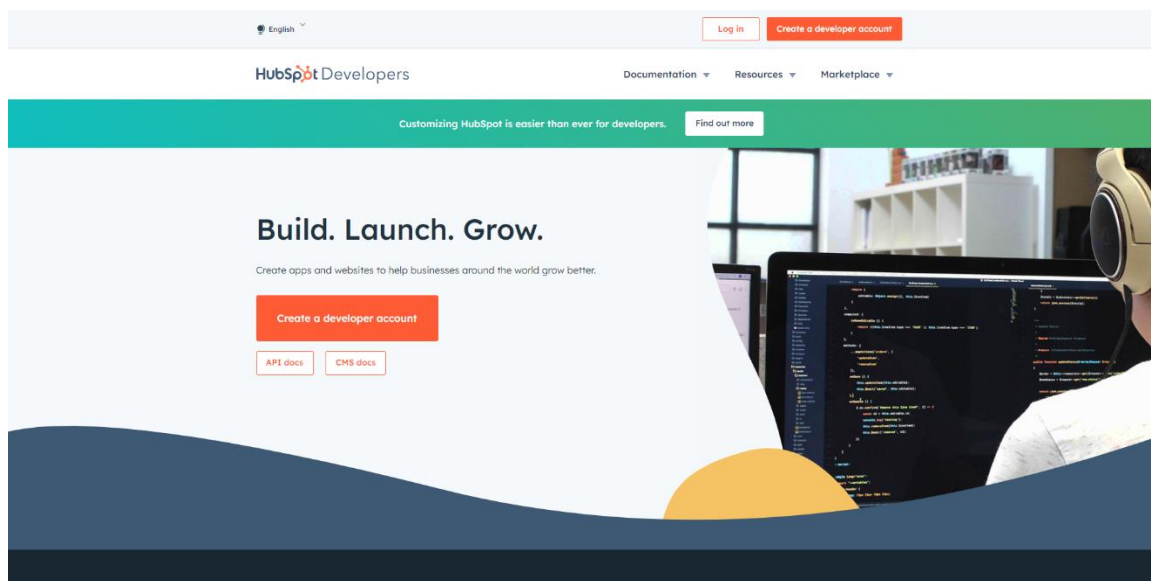
Note: The below-mentioned configuration steps are a one-time job.

In order to extract client ID and app secret follow the steps described below:




1. Login to HubSpot CRM and access the below URL address:

<https://developers.hubspot.com/>


Following screen is displayed:



2. Click on the **Create a developer account** button and following screen is displayed:

 An app	 A custom integration	 A website
<ul style="list-style-type: none"> Build and list your app on our App Marketplace, where HubSpot's 100K+ customers find apps to help run their businesses. Turn other people's business problems into your business opportunities. List an app to access the community, support, and distribution benefits of the App Partner Program. 	<ul style="list-style-type: none"> Build a custom solution specifically for your business (requires HubSpot account). Create access tokens for powerful and secure custom integrations for specific account data. Get started quickly, with no need to build OAuth management. 	<ul style="list-style-type: none"> Build a powerful, stunning website using the HubSpot CMS. Develop locally with your own editors and frameworks. Extend the functionality of your website with HubSpot APIs, integrations, and the App Marketplace. Get industry-leading content, security, and management so you can focus on code, not infrastructure.
<p style="text-align: center;">Create App Developer account</p>	<p style="text-align: center;">Get started with Private Apps</p>	<p style="text-align: center;">Create CMS Developer Sandbox account</p>

3. Click on the **Create App Developer account** button. Following screen is displayed:



It looks like you need to create an account.

Create your account to get started with HubSpot.

[Start sign-up](#)

[Create account with a new user](#)

4. Click on the Start Sign-Up button. Following screens are displayed asking for your job role and company name respectively:

What is your job role?

Job Role

_____ X

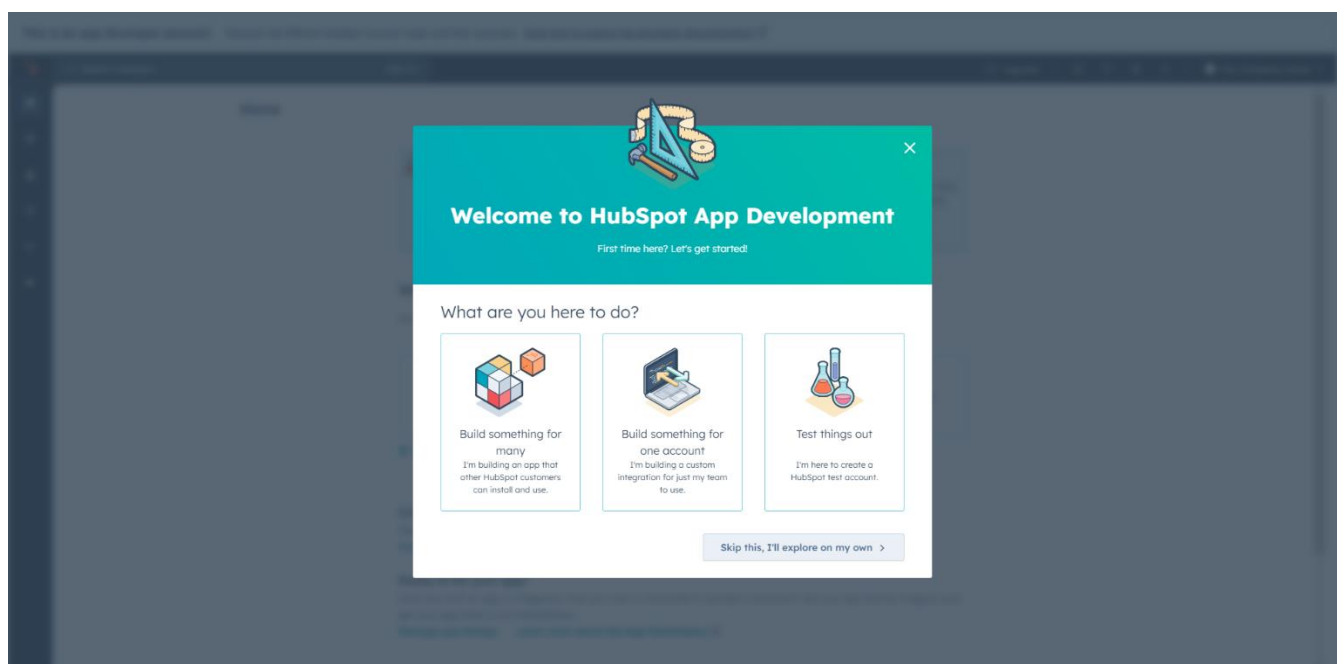
Next >

Give your developer account a unique name.

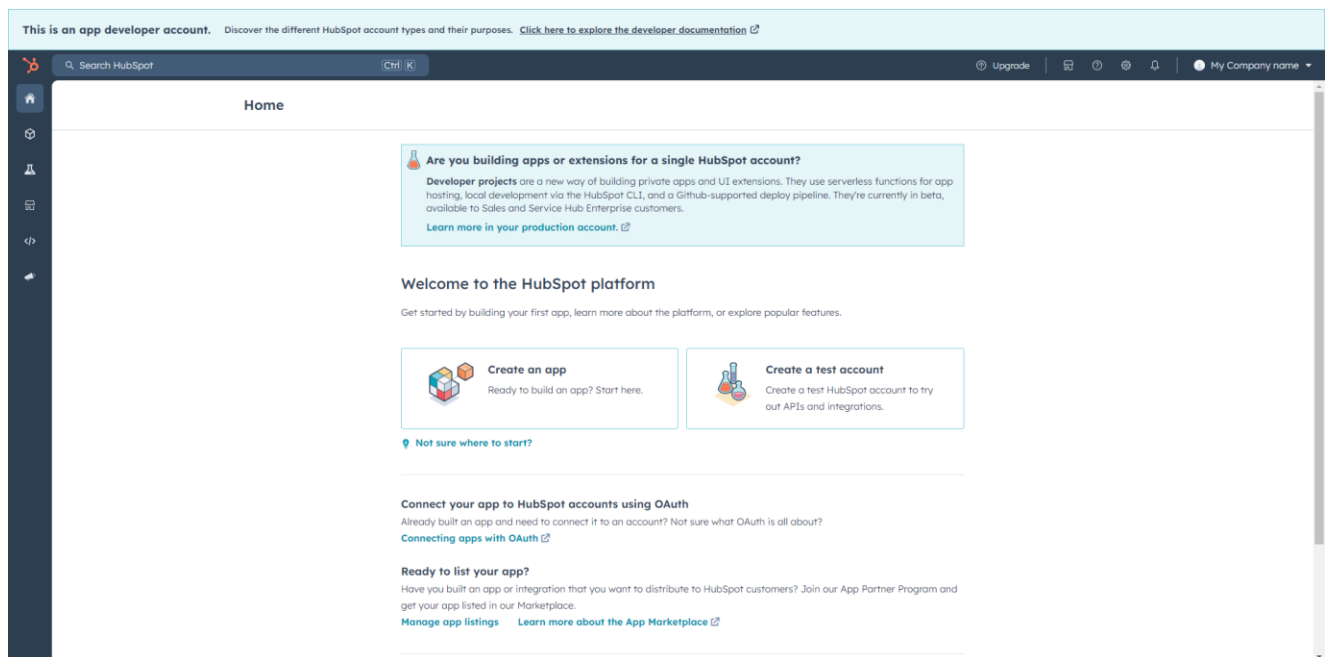
Company name

Next >

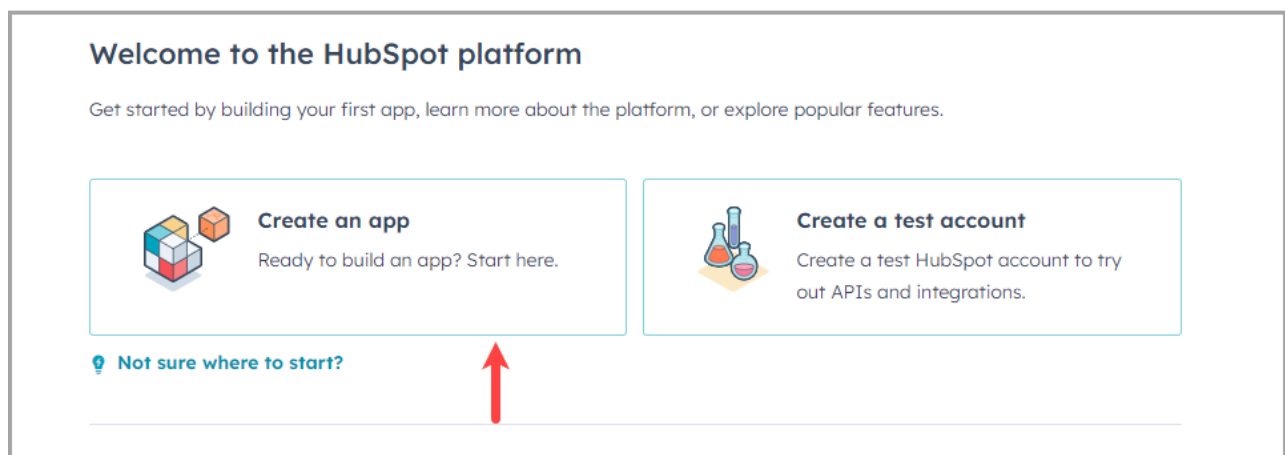
5. Once your account is setup, you are displayed with this pop-up window:



6. Click on the **Skip this, I'll explore on my own** button available at the bottom right corner. Following screen is displayed:



7. Click on the Create an App button as highlighted below:



8. On the next screen, enter RainbowCRMBridge as Public app name and provide an appropriate description of the application as shown below:

Getting started

Basic info

Contact & support

Monitoring

Features

CRM cards

Timeline events

Webhooks

App settings

Ready to deploy your app? Every app needs a valid install URL to connect an account. Go to auth settings to get started.

App Info Auth

Public app name *
This name will appear in HubSpot tools, App Marketplace listings, and other material.

RainbowCRMBridge 184 characters

App logo
A square logo that will be used to identify your app. A logo is required to get your app certified and listed in the Marketplace. [Learn more.](#)

Description

This is CRM bridge connector between Hubspot and Rainbow. It will connect both apps for the Calls and required contacts creation. 121 characters

9. Now click on the **Auth** tab as highlighted below:

Getting started

Basic info

Contact & support

Monitoring

Features

CRM cards

Timeline events

...

Ready to deploy your app? Every app needs a valid install URL to connect an account. Go to auth settings to get s

App Info **Auth**

Public app name *
This name will appear in HubSpot tools, App Marketplace listings, and other material.

RainbowCRMBridge 184 characters

App logo

Following screen is displayed:

App Info | **Auth**

Auth settings

These settings determine how your app connects to HubSpot and what data it has permission to access.

App credentials

App ID
This is your app's unique ID. You'll need it to make certain API calls. Copy

Client ID
This ID is unique to your app and is used for initiating OAuth. Copy

Client secret
Used to establish and refresh OAuth authentication. Show | Copy

Sample install URL (OAuth)

A user will need an install URL like this one to install your app. Install URLs are generated based on the app credentials, redirect URL, and scope configuration found on this page.

This sample install URL includes all required scopes and any optional scopes you've configured.

https://app.hubspot.com/oauth/authorize? client_id &
redirect_uri=http://localhost&scope=oauth Copy full URL

10. Scroll down to Redirect URLs section and enter following URL in this field as shown below:

<https://hubspot.openrainbow.io>

Redirect URLs

Users must be redirected to one of these locations after granting access to your app. If your install URL contains a redirect that's not in this list, users will get an install error.

<http://localhost> is also supported.

[Learn more about redirect URLs](#)

+ Add redirect URL

https://

Turn on advanced scope settings

Advanced scope settings allow you to set required, conditionally required, and optional scopes for your app. When this setting is turned on, only the scopes you've configured can be listed in your install URL. Listing additional scopes in your URL will cause installs to fail.

11. Go to Scopes section and click on the **Add new scope** button as highlighted below:

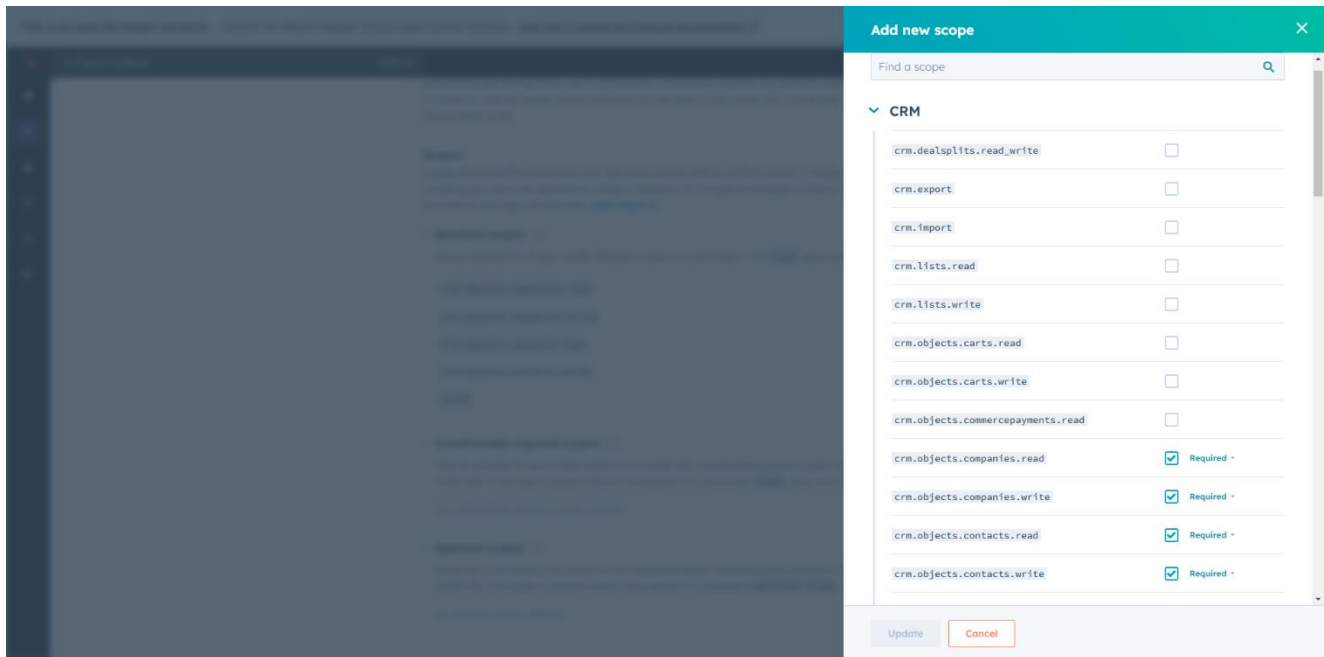
Scopes

Scopes determine the permissions your app has to access data or perform actions in HubSpot. People installing your app must approve the scopes it requests. It's strongly encouraged to require as few scopes as possible for your app's functionality. [Learn more](#)

+ Add new scope

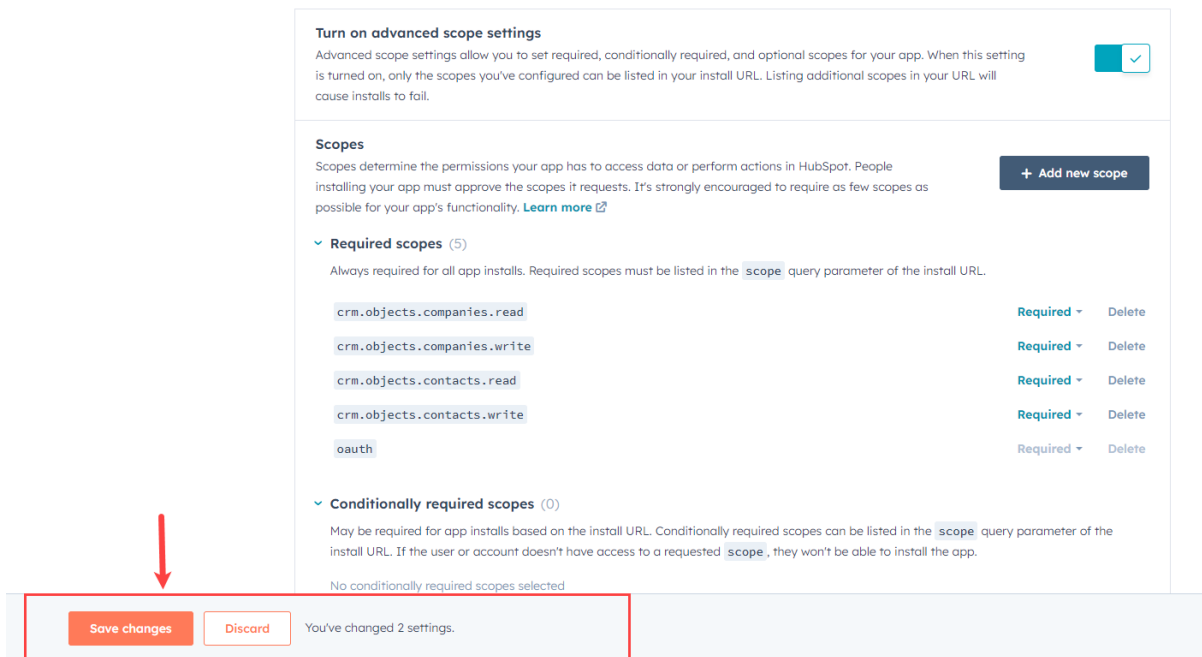
12. On the next screen, select following 4 scopes as Required:

- crm.objects.companies.read
- crm.objects.companies.write
- crm.objects.contacts.read
- crm.objects.contacts.write



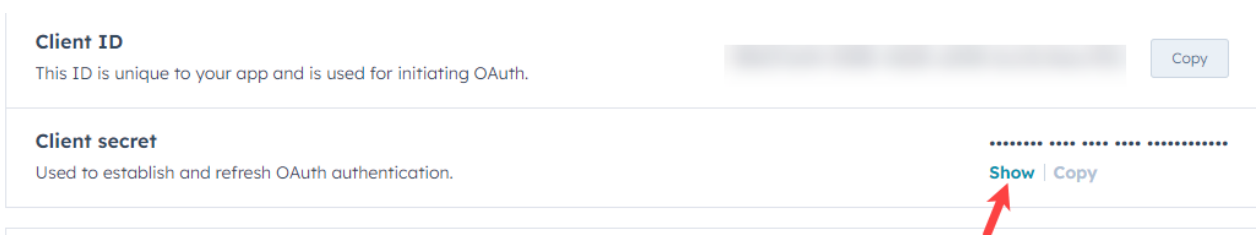
Click on the **Update** button.

13. You are brought back to the previous page and following pop-up is displayed at the bottom of the page as highlighted below:

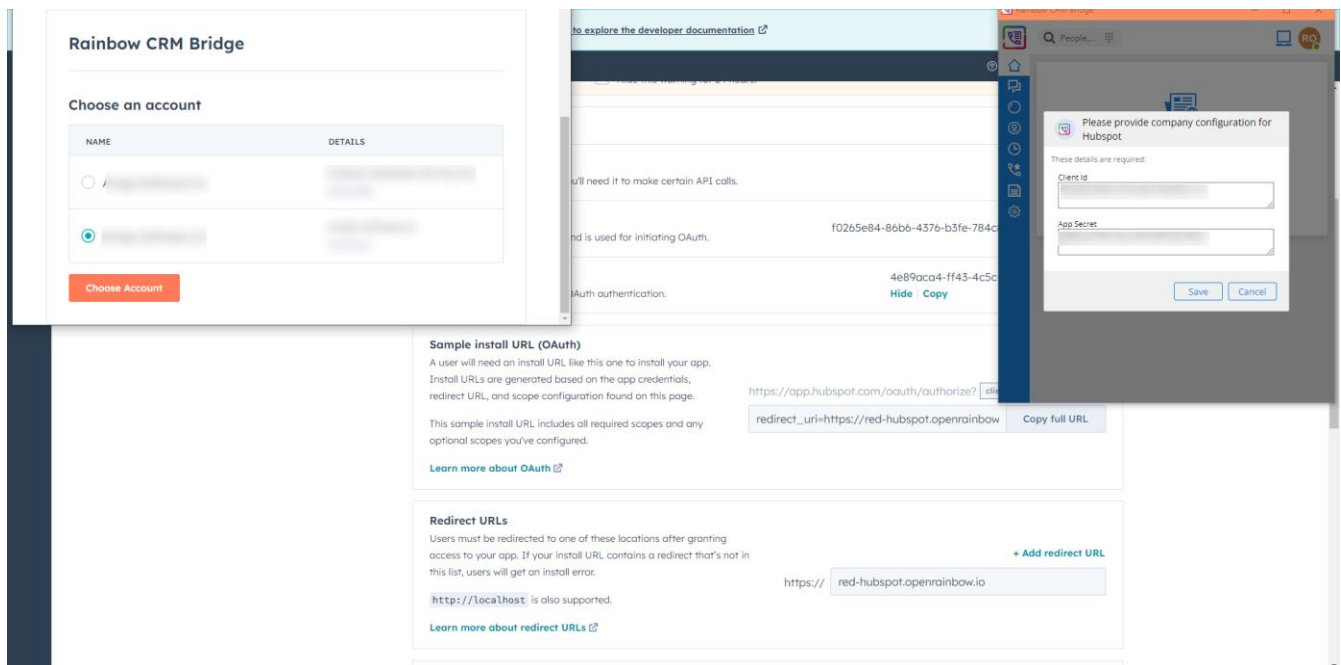


Click on the **Save Changes** button.

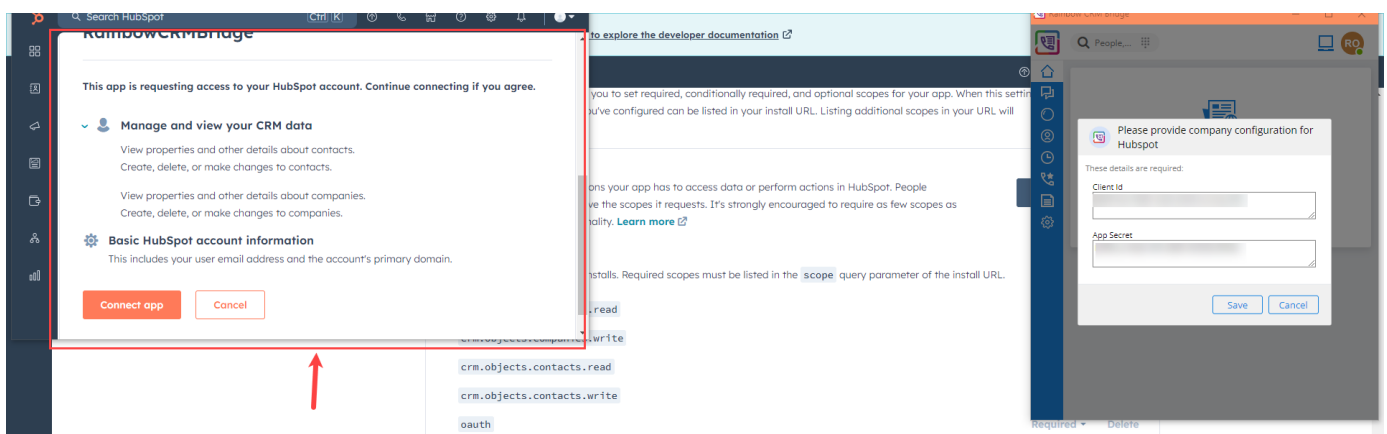
14. Scroll up to Client Secret and click on the Show option as highlighted below:



- Copy **Client ID** and **Client Secret** from the above screen and enter these values in respective fields of Rainbow CRM extension. When you click on the Save button on chrome extension, following pop-up is received in HubSpot CRM:



- In the above screen, select the account that was used for creating Client ID & App Secret and then click on **Choose Account**. Following screen is displayed in the pop-up



- Click on **Connect App** button on the pop-up.

Client ID & App Secret are now saved in chrome extension and the user can log into the Rainbow CRM bridge using SSO feature.

IMPORTANT!! The above screenshots reflect the current version of HubSpot CRM. Future releases may necessitate updates to the screenshots or configuration settings as required.

4 Rainbow Subscription & Supported PBXs

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

Rainbow CRM Bridge supports all available “Server Type” options such as OmniPCX Office (OXO) Connect, OmniPCX Enterprise (OXE) and 3rd 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-and-configuration-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.

5 Icon Glossary

Below you can see a list of icons (displayed next to Google Chrome address bar) and specific status of Rainbow CRM Bridge that these icons represent.



- You are not logged into the HubSpot CRM.



- You are logged in HubSpot CRM and should click on the extension to login into the Rainbow CRM Bridge. Same icon is displayed when you are logged into the Rainbow CRM Bridge.

6 Troubleshooting

In order to avoid the “Blocked State” of the CCD agent when the distant caller hangs up, the timer 384 value must be set to 0 (in system/timers) as highlighted below:

```
Review/Modify: Timers
Node Number (reserved) : 1
Instance (reserved) : 1
Timer No. : 384
Timer units : 0
```

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