

RAINBOW CRM BRIDGE - DEPLOYMENT GUIDE (MS DYNAMICS 365)

Rainbow CRM Bridge





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1 Document History

| Edition | Date | Changes / Comments / Details |
|---------|------------|--|
| 01 | 15/11/2019 | Initial deployment guide for MS Dynamics 365 |
| 02 | 16/12/2019 | Features matrix has been added ¹ |
| 03 | 22/01/2020 | Changes has been made for steps related to Channel Integration Framework installation. |
| 04 | 27/03/2020 | Rainbow CRM Bridge URL updated |
| 05 | 06/12/2021 | Section 3 Architecture diagram has been updated. Section 5 New section has been added and remaining sections have been renumbered. |
| 06 | 20/09/2022 | Legal Notice has been updated. |
| 07 | 20/12/2022 | Section 7 New section about known limitations has been added. |



2 Introduction

Rainbow CRM Bridge acts as a middleware that connects third party CRMs e.g. ServiceNow, MS Dynamics 365 etc. with ALE Rainbow.

Rainbow CRM Bridge is hosted in ALE Rainbow Cloud and works inside third party CRMs as an integrated component. It allows users to leverage on Rainbow collaboration functionality without having to use another application.

As soon as users are logged into their CRM User Interface, they are presented with the option to login on Rainbow Platform as well. Currently, Single-Sing-On (SSO) is not available but it is part of the roadmap.

Once a user is logged in Rainbow platform, Rainbow CRM Bridge allows users to search for Rainbow contacts, chat, have Rainbow to Rainbow Calls and work with their office phone system. More detail of the features is available in section 3 of this document.



3 Architecture

The below diagram outlines a functional flow where Rainbow CRM Bridge application acting as a central hub. One end is communicating with Rainbow Cloud using Rainbow WebSDK for different business operations like Rainbow user login, session handling, contacts management, conversations, Audio and Video calls etc. and the other end is bridging with MS Dynamics CRM, using Channel Integration Framework for 'Click To Dial' functionality and to retrieve customers/contacts information.

4 Features Matrix

Following provides a summarised view for all the Rainbow CRM Bridge application components included in the technical architecture.

| Feature | Rainbow Essential User | Rainbow Business User | Rainbow Enterprise User |
|--|---------------------------|--------------------------|----------------------------|
| Contacts Search | 0 | 0 | 0 |
| Presence | 0 | 0 | 0 |
| Chat with Contacts | 0 | 0 | 0 |
| Rainbow to Rainbow Call (WebRTC) | 0 | 0 | 0 |
| Remote Call Control (CTI) | 0 | 0 | 0 |
| Phone Call History | 0 | 0 | 0 |
| VoIP (Computer) * | Х | 0 | 0 |
| Nomadic Mode * | x | 0 | 0 |
| Click to Call | 0 | 0 | 0 |
| Screen Pop (Auto Search - Contact Search and Display) | 0 | 0 | 0 |

* Rainbow WebRTC Gateway should be configured for Call/Media flow to Rainbow Cloud

5 Setting up Rainbow CRM Bridge in MS Dynamics CRM

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

5.1 Equipment Settings

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-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.

6 Setting up Rainbow CRM Bridge in MS Dynamics CRM

Following steps provide a walk-through of required configuration to enable Rainbow CRM Bridge in MS Dynamics CRM.

6.1 Channel Integration Settings

This component initializes the connectivity by creating a Rainbow WebSDK object in the application global memory space. The object is responsible to carry out all the transactions between CRM Bridge and Rainbow. The communication is made over secure web sockets and data transfer using circular JSON over HTTPs.

Step 1: Sign-in to MS Dynamics CRM and click box Find more apps that work with Dynamics 365

| | Dynamics 365 Home | | | | | |
|---|--|---|---|------------------------------------|-----------------|---|
| Q | Search my apps | - | | \bigtriangledown | € Sync 🛛 Filte | er 🦻 Get more apps |
| М | y apps | | | | | \uparrow abc \checkmark \Box \checkmark |
| | Ð | Ø | • | Find more apps that Dynamics 36 | work with 55 | |
| | Dynamics 365 Talent: Attract | Dynamics 365 Talent: Onboard | Test App yetti-systems.com (default) | (+) | | |
| | Empowering you to hire the most talented people for your team with engaging candidate experiences that set you apart in the market. | Empowering you to set employees up for success with personalized employee onboarding experiences that provide the right resources, training and connections. | | AppSource 7 | 1 | |
| | Get started with one of our consulting partners | | | | | |
| | (+) | | | | | |

Step 2: Type 'Channel Integration Framework' in the 'Search Box'.

| III Dynam | nics 365 Home | | | | | ٥ | ? 🗛 |
|---|--|--|---------------------|--------------------|-------------------------------|---|-----|
| Q. Search m | | | | | | | |
| | AppSource Apps f | or Dynamics 365 | | | | | |
| My apps | Apps (1) My organia | zation (0) Other apps \vee | | | Channel Integration Framework | 9 | |
| Dynamic Talanti Ungoole (candidar in the m | Products Dynamics (28 > | Array and a second secon | | | | | |
| | Agriculture Education Distribution | | | | | | |
| Book A | Find more apps and consulting s | ervices at AppSource 🥕 | | | | | |
| PowerApps | | | | | | | |
| https://appsource. | microsoft com lan-un losoduct laboramie | rs. 365/macros d'365ciframework?embadH | lost-chenamics.3658 | tab-Outping Income | | | |

Step 3: Click Continue button to start with the installation process.

| Apps (1) My organ | Dization (0) Other apps ~ | | | Channel Integration Framework |
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| Products Operation 30 > Department 30 > Employment 30 > Employment 30 > Employment 40 > Employ | Description Description State State | One more thing Parameter as the second | × el Integration Framework usage, en tersactional information for support, rando product in and came from Morand, epidemont is governed governations | |
| Antering Marketing Operations + supply Productivity Sales | | | Þ | |
| Agriculture Education | | | | |

Step 4: Click **Agree** button to proceed with the installation.

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| Publisher Microsoft Dynamics 303 | | |

Step 5: Wait until the installation is complete. This normally takes a few minutes.

| 🗧 Microsoft Dyn | amics 36 | 5 | | |
|--|-----------------------------|--|---|---|
| Welcome | | | | |
| here's a better way to manage you NOTANKES UPDATES SERVE | ce HEALTH | new Admin.center CKUP & RESTORE APP | UCATIONS | |
| Manage your solution | ъ | | | |
| Manage your | solutions | | | |
| Select a preferred | olution to m | RM Bridge | | |
| SOUTION NAME | VERSION | AVAILABLE UNTIL | \$50.45 | |
| Al Solution Anchor | 1.10.1.8 | 1/1/2050 | Installed | Channel API Integrat |
| Channel API Integration F | | 1/1/2050 | Installation pending | |
| Company News Timeline | 9.0.1.716 | 1/1/2050 | Not installed | Please wait while installation starts. This may take a few minutes. |
| Contextual Help Base | 1.0.0.10 | 1/1/2050 | Not installed | Bring your communication channels and build |
| Dynamics 365 for Talent A | 62172 | 1/1/2021 | Not installed | immensive experience with Dynamics 365 |
| Dynamics 365 Healthcare | 1.000 | 1/1/2021 | Not installed | Created by Microsoft |
| Email in Unified Interface | 9.0.0.3025 | 1/1/2050 | Not installed | Learn more DY |
| | 1000 | 1/1/2050 | Upgrade available | |
| Environment Variables So | | | | |
| Environment Variables So InsideView Insights | 43 | 12/31/2021 | Not installed | |
| Environment Variables So Inside/View Insights OData v4 Data Provider | 4.3 9.0.0.106 | 12/31/2621 | Not installed Installed | |
| Environment Variables So Inside/Iew Insights ODuta v4 Data Provider Office 365 Groups | 4.3 9.0.0.106 2.9.0.2 | 12/31/2021 1/1/2050 1/1/2050 | Not installed Installed Not installed | |

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Step 6: Once installation is complete, go to the Power Apps section and Click Channel Integration Framework application.

| ∷: PowerApps ∨ Settings > | Му Аррз | | | |
|---|---|---|------------------------|--|
| , ∽ Search my apps | | | | |
| ▼ Published Apps (5) | | | | |
| Þ | Ē | \$ ⁰ | | |
| Dynamics 365 — custom Provides access to the full suite of capabilities, including administration | Asset Checkout Asset checkout provides self-service capabilities to reserve the tools and | Channel Integration Fra Bring your com inication channels and build immersive experience with | Fundraiser | Innovation Challenge Start a company wide innovation challenge. Ideas are submitted, |
| Microsoft Dynamics 365 11/15/2019 WEB | · Microsoft Dynamics 365 UNIFIED INTERFACE | Microsoft Dynamics 365 UNIFIED INTERFACE | Microsoft Dynamics 365 | Microsoft Dynamics 365 |
| ▼ Apps Being Edited (0) | | | | |
| Create new App | | | | |
| (+) | | | | |

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Step 7: Click + New to add a channel provider for Rainbow CRM Bridge application.

| | PowerApps 、 | ∕ Cŀ | annel Integration I | ramework | Channel Integration Fr | amework > Cha | annel Providers | | | | | |
|-----|-------------------|--------|---------------------|-----------|------------------------|---------------|--------------------|---------------|--------------|-------------|---------------------|-------------------|
| ≡ | | | 🛱 Show Chart | + New | 🗊 Delete 🛛 🗸 | 🖔 Refresh | 🖾 Email a Link 🗸 🗸 | ⊿⁄ª Flow ∨ | 💷 Run Report | ∨ 🕮 E | xcel Templates $~~$ | 💐 Export to Excel |
| ඛ | Home | | Active Cha | annel Pro | oviders \checkmark | | | | | | | |
| Ŀ | Recent | \sim | | | | | A - | | | _ | | |
| \$ | Pinned | \sim | ✓ Name | | | | T S | 7 Channel Ord | er | Y | Label | |
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| Cha | nnel Provider | | | | | | | | | | | |
| × | Channel Providers | | | | | | | | | | | |
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| | | | | | | | | | No | data availa | ble. | |
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| | | | | | | | | | | | | |

Provide following set of information for New Channel Provider section.

New Channel Provider

| C | hannel Provider Confi | igur | ation | | |
|---|----------------------------------|------|--|--|---|
| | Name | • | Rainbow CRM Bridge - MS Dynamics 365 | Select Unified Interface Apps for the Channel Select the Roles for the Channel | |
| | Label | • | Rainbow CRM Bridge - MS Dynamics 365 | Innovation Challenge a | , |
| | Channel URL | • | https://rbc.quick-interact.com/edemomscrm/ $\hfill \ensuremath{\mathbb O}$ | Select All J Items | |
| | Enable Outbound Communication | • | Yes | Aut.Oxdout Fundsker | |
| | Channel Order | 1 | 1 | Control Internet Conference | |
| | API Version | | 1.0 | | |
| | Trusted Domain | | | | |
| | Custom Parameters | | | | |
| | | | | | |

| Field | Description |
|-------------------------------|------------------------------------|
| Name | Rainbow CRM Bridge |
| Label | Rainbow CRM Bridge |
| Channel URL | https://msdynamics.openrainbow.io/ |
| Enable Outbound Communication | Yes |
| Channel Order | 1 |
| API Version | 1.0 |
| Trusted Domain | Optional field (not required) |

| Custom Parameters | Optional field (not required) |
|--|---|
| Unified Interface Apps for the Channel | Select the application for which Rainbow CRM Bridge integration is required e.g. Sales, Innovation Challenge etc. |
| Channel Role(s) | Select the security role(s) (configured in MS Dynamics 365) that needs to be assigned to the channel provider. In case, no security role is assigned, the channel provider will be visible to all users assigned for the Dynamics 365 Unified Interface App. |

Once this 'Channel Provide' is created, Rainbow CRM Bridge will be available and ready to use in the selected application.

6.2 Configuring 'Click To Dial'

This component initialises the connectivity by creating a Rainbow WebSDK object in the application global memory space. The object is responsible to carry out all the transactions between CRM Bridge and Rainbow. The communication is made over secure web sockets and data transfer using circular JSON over HTTPs.

Following section lists down the steps to configure 'Click To Dial' option for Business and Mobile phone fields under 'Contacts' form.

Step 1: In Active Channel Providers section, Click Advanced Settings option.

| annel Integration Framework | Owned Integration Fran | nework > Channel Providers | | | | | | | | | ٩ | ø | + | Y | Θ | ? | 8 |
|-----------------------------|--|----------------------------|------------------|----------------|---------------------------------|----------------|-------------|--------------|---------------|-------------|-----------|------------|---------|-----|---|---|---|
| Show Chart + New | \textcircled{B} Delete \mid \lor | O Refresh 50 Email a | Link 🛛 🗸 🖉 Row 🗅 | 🖉 🗐 Run Report | ✓ ● ● ■ Exc | el Templates 🗸 | C Export | to Excel ~ | đi Imj | port from E | Personal | ization S | ettings | | | | |
| Active Channel Pro | viders 🗸 | | | | | | | | | | Advance | d Setting | ps | | | | Q |
| ✓ Name | | | † ⊽ Channel G | Drder | Ÿ | Label | | | v | Created 0 | Toast No | tification | Display | у Т | | v | |
| Rainbow CRM Bridge | MS Dynamics 365 | | | | 1 | Rainbow CRM | Bridge - MS | Dynamics 365 | | 11/15/2 | Privacy 8 | 2 Cookie | | | | | |
| | | | | | | | | | | | Software | license | terms | | | | |

Step 2: Click Settings menu and then Customizations option.

Step 4: From the left panel section, expand tree through Entites -> Contact and select Forms option. This will open the below screen.

| Entities | New • X Delete 8 Enable Securit | y Roles 🛛 👼 For | m Order 🕶 🛃 Activa | te 🔰 🚑 Dead | tivate More Ac | tions - | |
|---------------------|---------------------------------|-----------------|----------------------|-------------|----------------|-------------|--------------------------|
| Account | Name | Form State | Form Type 🛧 | State | Customiza | ble Version | Description |
| Activity Address | Contact Card form | Active | Card | Managed | True | 8.0.0.0 | Default Contact card f |
| Al Configuration Al | Contact | Active | Main | Managed | True | 5.0.0.0 | Updated default Cont |
| Al Object Detection | Contact Quick Create | Active | Quick Create | Managed | True | 6.0.0.0 | Default quick create fo |
| Al Object Detection | Contact Reference Panel | Active | Quick View F | Managed | True | 8.0.0.0 | A form that displays R |
| Al Object Detection | Live Persona Card Form | Active | Quick View F | Managed | True | 9.0.0.0 | A form that displays t |
| Appointment | Social Profiles | Active | Quick View F | Managed | True | 6.1.0.0 | A form that displays s |
| | Recent Cases and Entitlements | Active | Quick View F | Managed | True | 8.0.0.0 | A form that displays t |
| A Challenge | Contact Quick Form | Active | Quick View F | Managed | True | 5.0.0.0 | This is the form that is |
| Channel Property | account contact card | Active | Quick View F | Managed | True | 6.0.0.0 | A form that displays ti |
| Channel Provider | contact card | Active | Quick View F | Managed | True | 5.0.0.0 | A form that displays the |
| Component Layer | | | | | | | |

Click Contact row having Form Type Main. This will open the 'Contact' form in design mode.

Step 5: Click **Business/Mobile** phone fields and this will open the form for these field properties. Under section **Control**, select **'Add Control'** option.

| Remove Redo Edit Sele Solution: Default Sol Form: Contact | Header Footer Navigation Rules Properties set | Field Properties Modify this field's properties Display Formatting Details Control Text Box (default) Add Control | Events Business Rules Con Web Phone | ? Introls Tablet © | × |
|--|---|--|--|-----------------------------|------------|
| Summary CONTACT INFORMATION Full Name Job Title | ful Name fob 100e | | | | ebreakers. |
| Account Name Email | Company Name Email | Select or add | a custom control to see its co | onfiguration. | |
| Business Phone Mobile Phone | Mobile Phone | | | | |
| Preferred Method of Contact | Preferred Method of Contact | | | | |
| Address | Address 1 | | | OK Cance | elssistant |

Step 6: Select Channel Communication Control option on the Add Control screen and click Add button.

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Step 7: Under Control tab on Field Properties form, select Channel Communication Control row and choose all the three options i.e. Web, Phone, Tablet and click OK.

| Fie Mo | eld dify th | Propert his field's pro | ies perties. | | | | | | | | | | ? | × |
|-----------|----------------|----------------------------|-----------------|--------|----|--------------|---|--------|-----|------|---|---|---|---|
| Di | splay | Formatting | Details | Events | Bu | isiness Rule | s | Contro | ols | | | | | _ |
| | Contro | ol | | | | Web | P | hone | Та | blet | | | | |
| | Text B | ox (default) | | | | 0 | | 0 | (| С | - | | | |
| | Chann | el Communicat | ion Control | | | ۲ | | ۲ | (| • | | × | | |

Step 8: Click Save and select Publish to publish all the customizations.

| PowerApps | | |
|--|---|---|
| FILE HOME INSERT | | Ø |
| Save As Save and Close Publish Save | Image Remove operties Image Remove oper | |
| Form headers now default | to high density to display more data. Use the new form designer to edit header density. <u>Learn more</u> | |
| 4 Contact | Solution: Default Solution | Field Explorer > |
| Details | Summary | Filter All Fields ▼ ✓ Only show unused fields |
| Activities | CONTACT INFORMATION SOCIAL PANE Assistant | Address 1: Address Type |
| Social Profiles | Full Name Assistant Interview Assistant | Address 1: City |
| 🛃 Audit History | | Address 1: County |
| Feedback | Account Name Company Name | Address 1: Fax |
| ⊿ Sales | Email Email Publishing customizations | Address 1: Latitude |
| ▲ Service | Business Phone Business Phone | Address 1: Longitude |
| [| Mobile Phone Mobile Phone | Address 1: Name |
| ▲ Marketing | | Address 1: Phone |
| | | Address 1: Post Office Box |
| 4 Process Sessions | Preferred Method of Preferred Method of C Contact | Address 1: Primary Contact Name |
| | Address Address 1 | Address 1: State/Province |
| | | Address 1: Street 1 |
| | | Address 1: Street 2 |
| | Map View | Address 1: Street 3 |
| | | NI F1-14 |

After publishing, 'Click To Dial' feature will be available for both **Business** and **Mobile** phones in **Contacts** form. Clicking on the **dial** button will pass the information to **Rainbow CRM Bridge** and 'audio/video' call will be dialed to the selected contact.

7 Known Limitations

This section contains all the limitations applicable on Rainbow CRM Bridge when used specifically for MS Dynamics 365

1. In case telephonic mode is set as Other Phone then all call controls on Rainbow CRM Bridge will be disabled.

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