Rainbow HubSpot Connector

Starter Guide

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1. Introduction

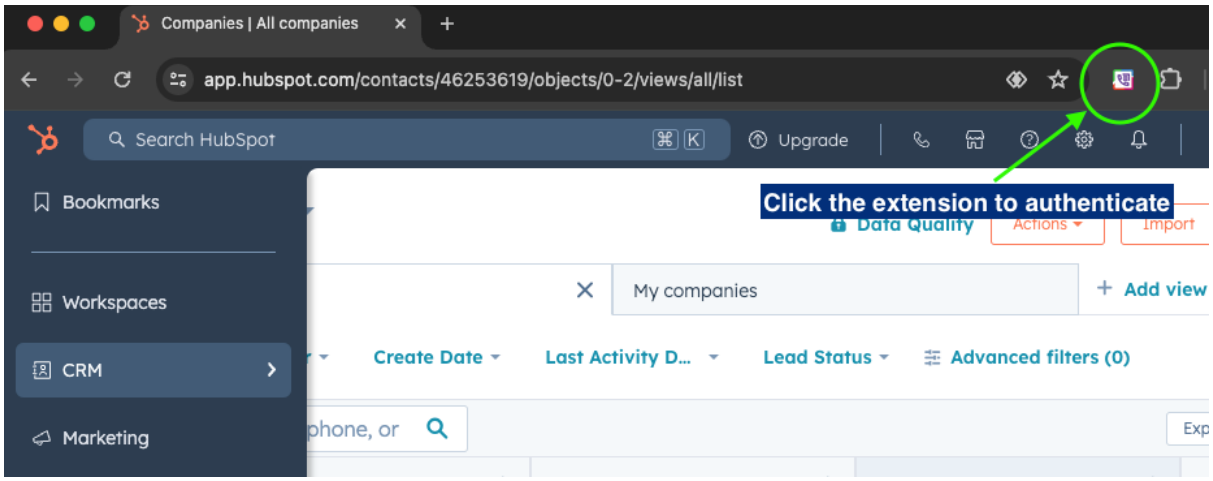
The **Rainbow CRM Bridge for HubSpot** will add **real time communication and collaboration capabilities** to your **HubSpot** instance by integrating the company telephony system capabilities.

The **Rainbow HubSpot Connector** is available as a browser extension and can be downloaded from Chrome Web Store.
Make sure it is already installed to your browser (Chrome, Opera, Brave, Edge) before going further.
If not installed, the connector can be installed from this Chrome Web Store page:
https://chromewebstore.google.com/detail/rainbow-crm-bridge-for-hu/empnokmbbkhefagacpkcklmhboijnbco

With this connector, a user will be able to perform calls from your HubSpot contact records(Click-to-call or C2C), manage incoming calls that will screen-pop the corresponding contact record information based on the caller phone number, record call logs into your CRM. From the connector, a user is also able to chat or call any member of its organization as well organizing internal conferences or conferences between your customer and any member of your team.

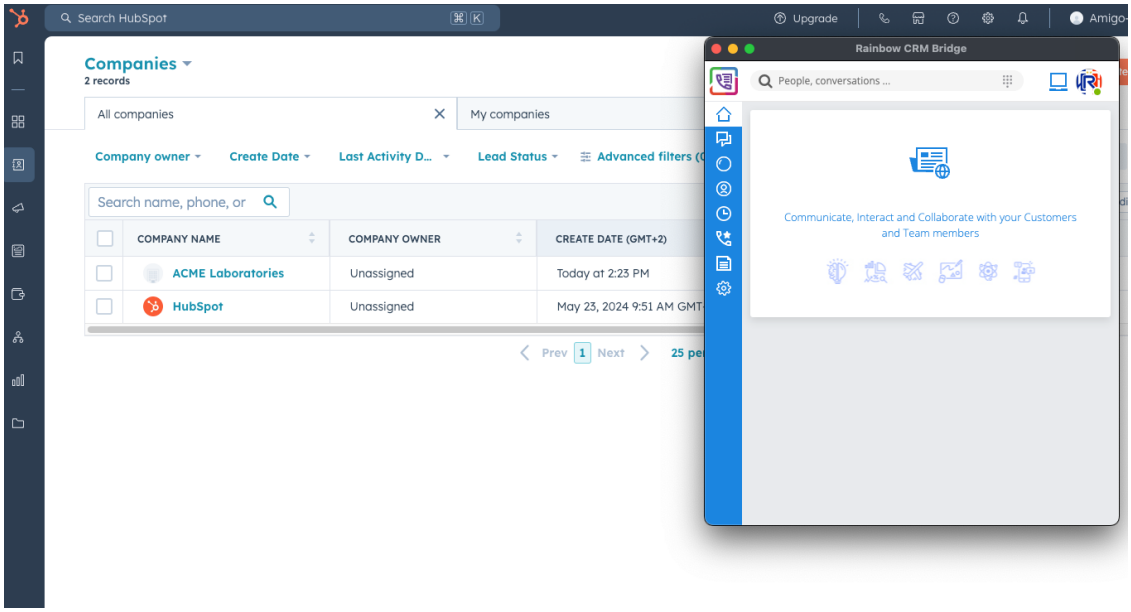
2. Connector Authentication

- After accessing your HubSpot instance, please click the Rainbow Connector extension of your browser to authenticate:



- If not yet connected, you will be invited to enter either your SSO credentials or Rainbow credentials to authenticate and start using the connector:

- Once authenticated, the connector will open as shown below and you will be ready to use it during your HubSpot session:



Please note that the connector can be moved, hidden, resized as you wish. When it is not needed, clicking outside the connector will automatically hide it, to not impact your daily work in HubSpot.

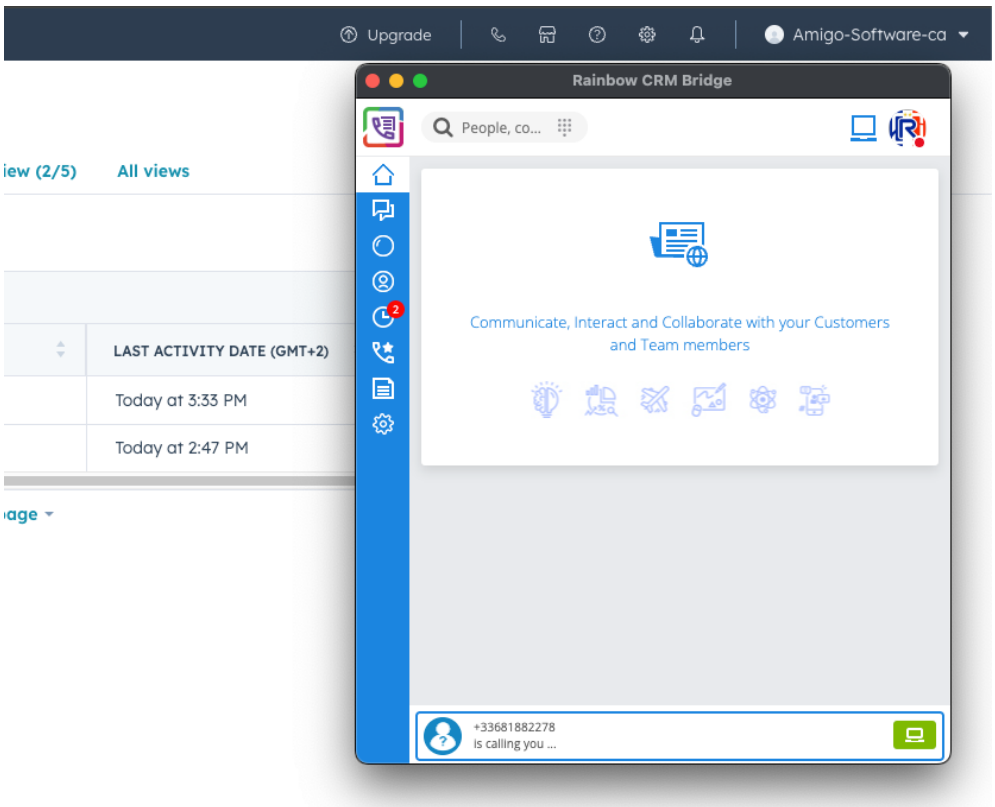
3. Incoming calls.

When you get a call, the connector will show up upfront of your browser and you will the incoming call number displayed at the bottom of the connector window.

There will be 2 incoming scenarios that will be described:

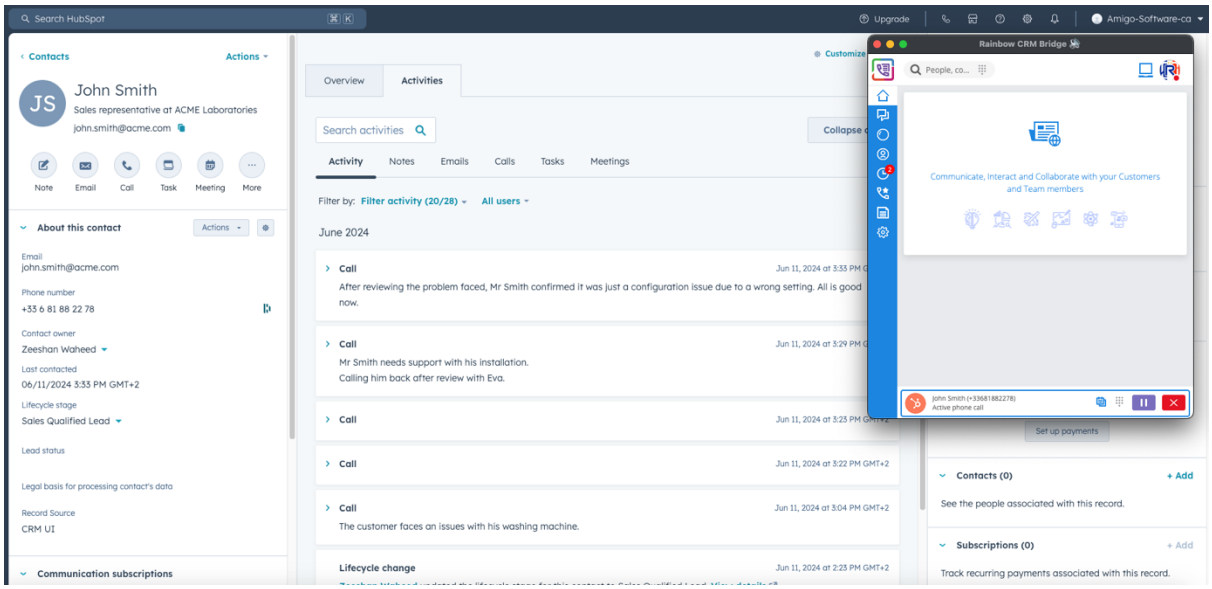
1) 1 calling number matching a single contact record in your HubSpot instance
2) 1 calling number associated to more than a single contact (so, 2 or more)

1 - Calling number for Single contact record in HubSpot:

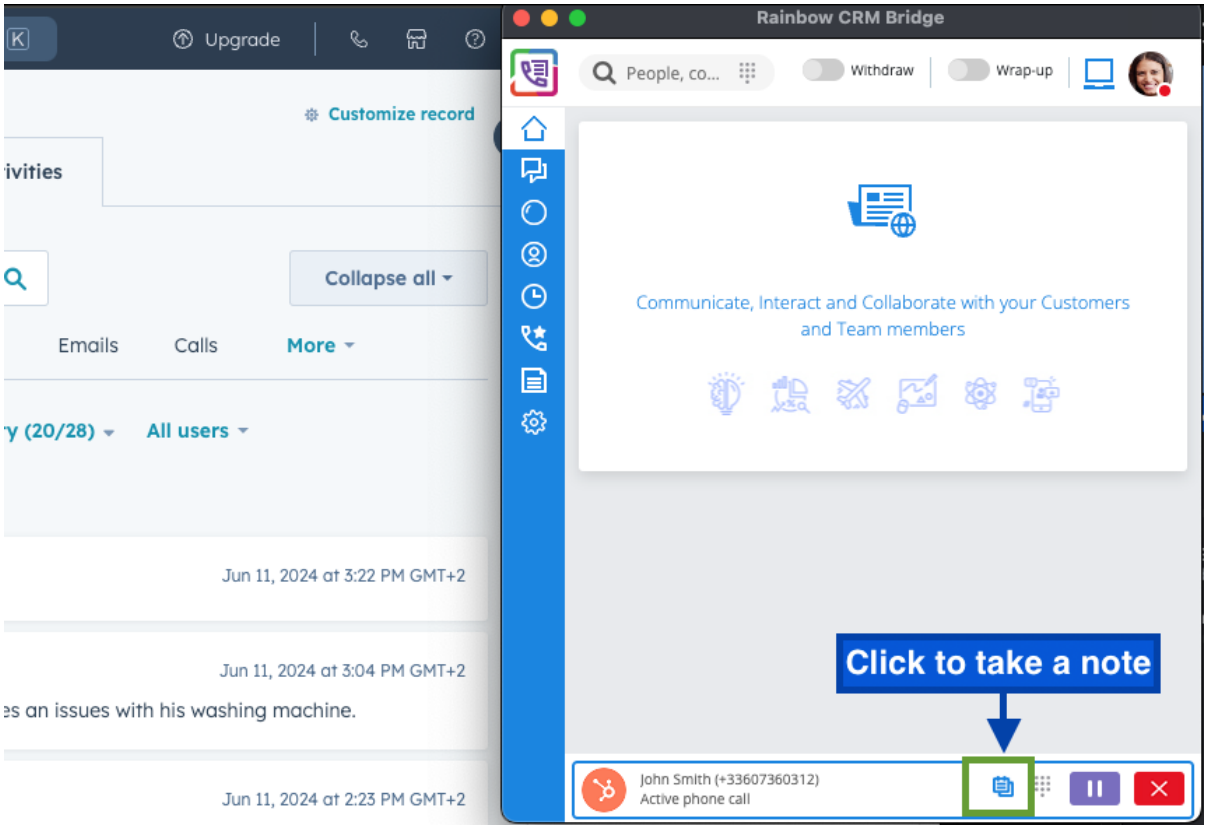


- To pick-up the call, click the button:

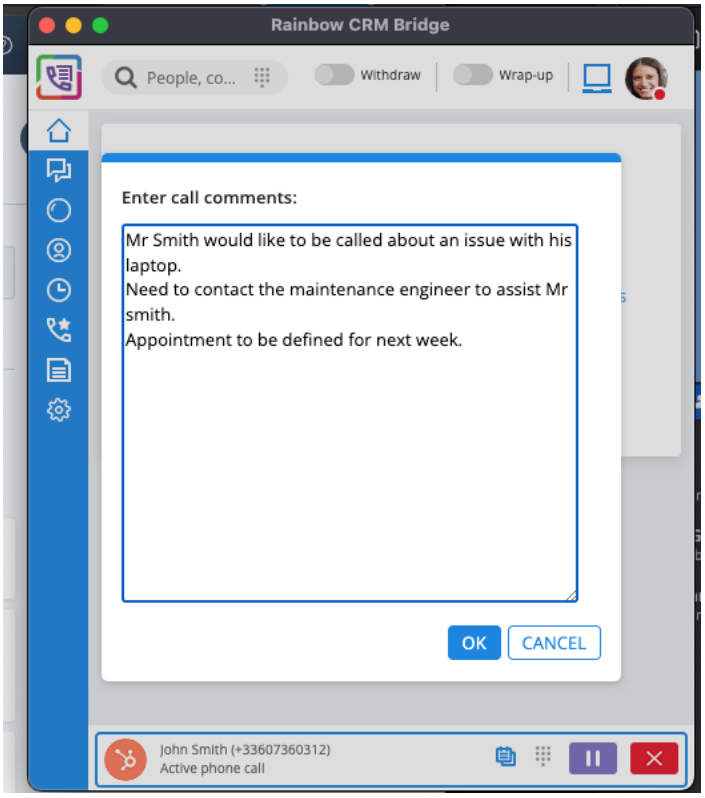
- Once the call is taken, the contact record page will be opened.



- During the call, you can write a text note by clicking this button:



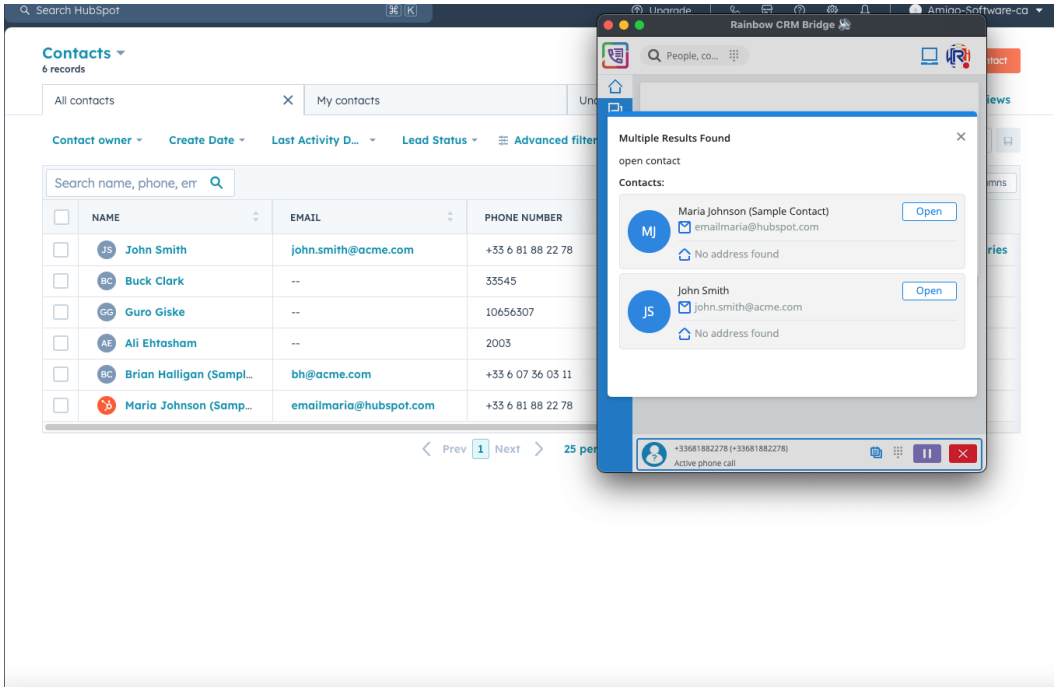
- Clicking the above button will open this window that is ready to capture any text note:



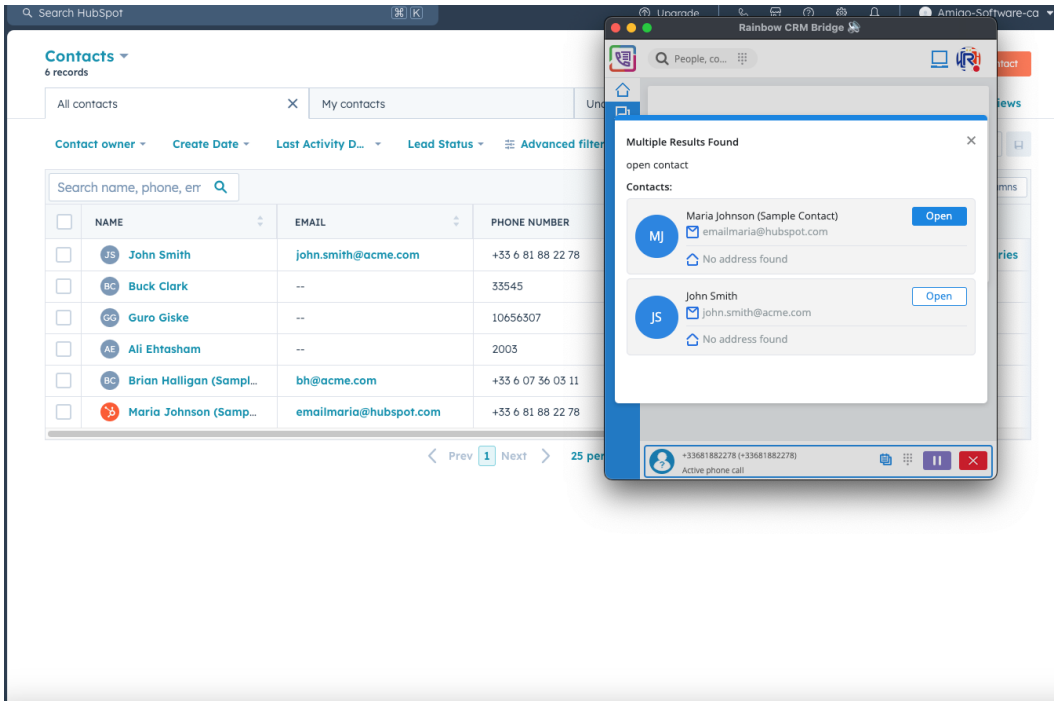
- Clicking OK will validate the note that will be added to the contact call activity records (see call activity chapter).
  Please note that until the call is active, you are able to recall the note to modify or complete it.

2 - Calling number associated to more than a single contact in HubSpot:

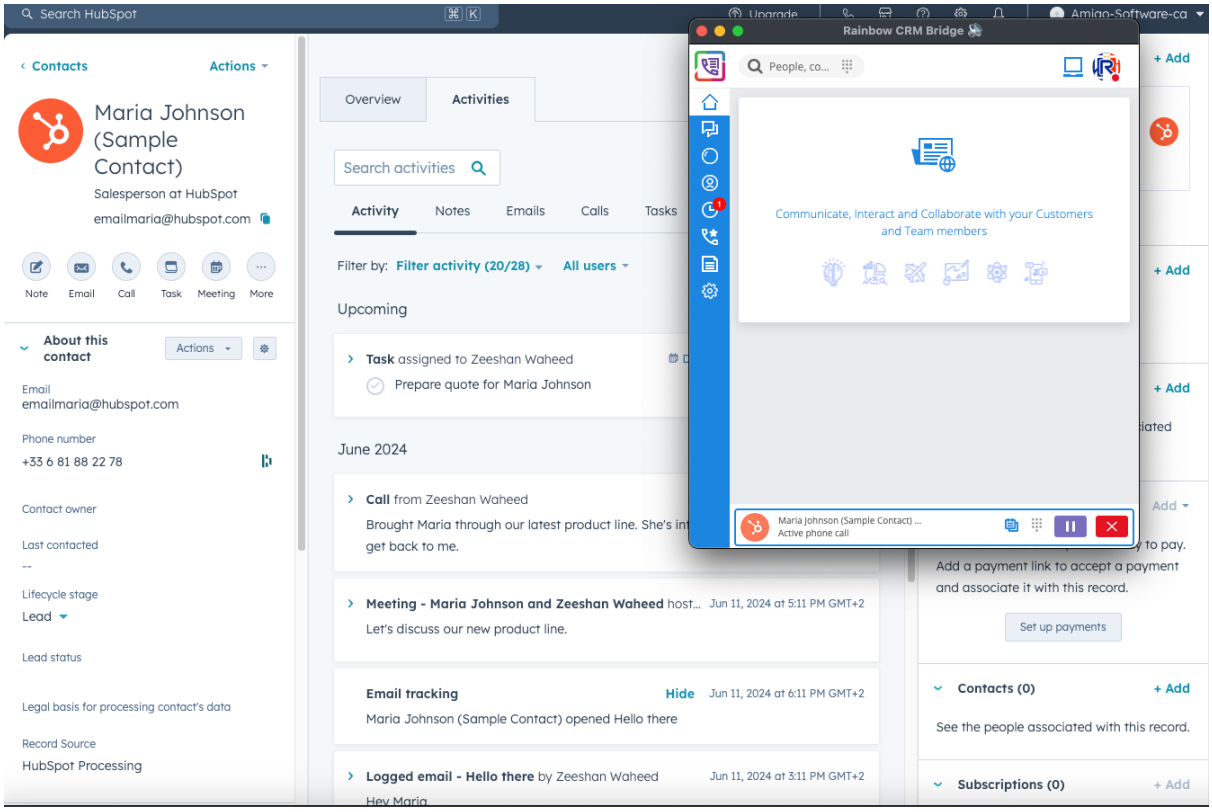
If a calling number is assigned to more than a single contact in HubSpot, the connector will propose the user to choose which record to open after taking the call and identifying the caller.



From the card list showing the names of the potential caller, the user will click the corresponding contact 'Open' button to open the relevant record page.



Once the selected contact page is opened, the user will see the connector displayed and it can be hidden as explained in the introduction during the call.



- During the call, you can write a text note as detailed in the previous paragraph related to Calling number for Single contact record in HubSpot

4. Outgoing Call: Click To Call

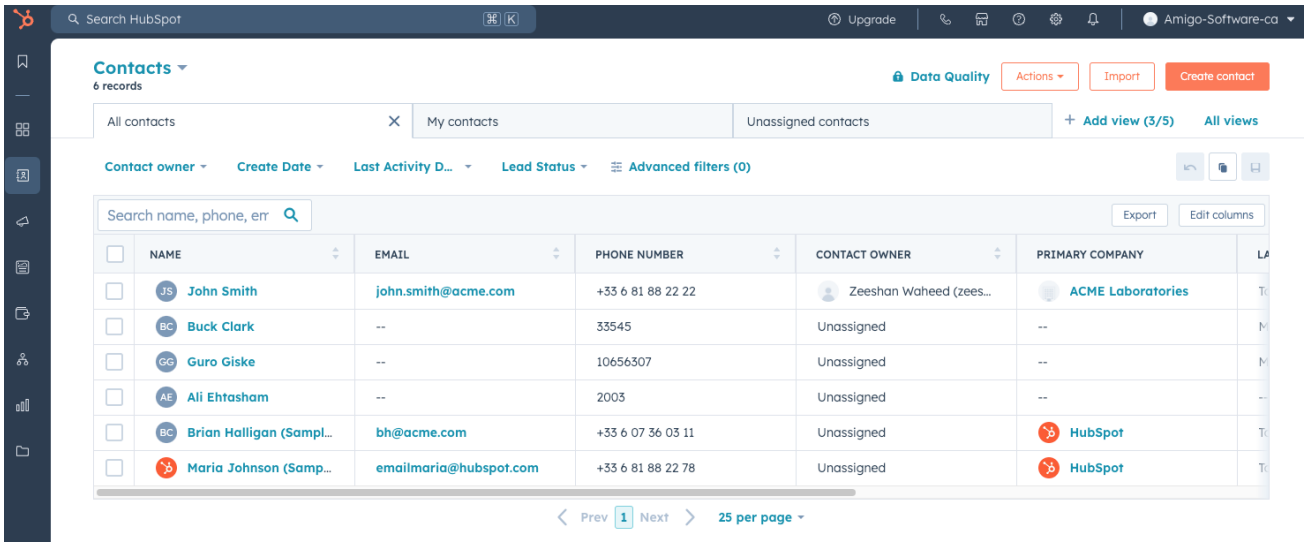
Important note:

Due to a HubSpot API change, the Click To Call can only be performed for the Contact list as it will be detailed just after.

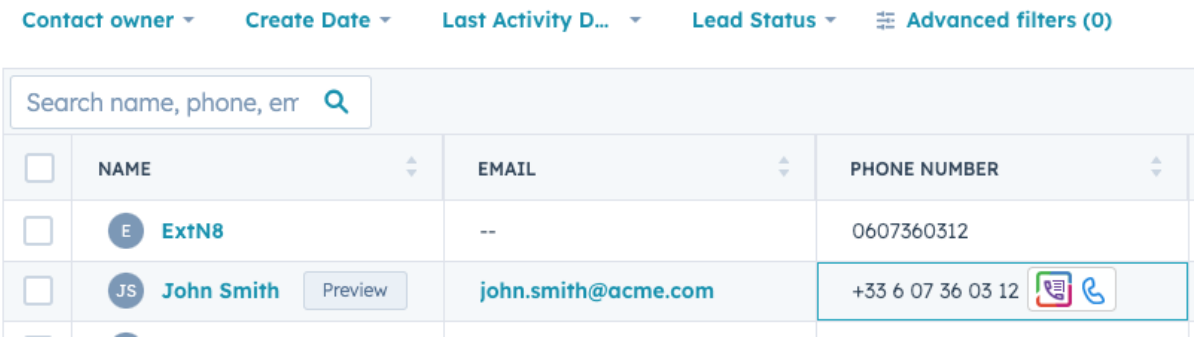
The ability to perform a Click To Call from the contact record will be back with the next connector release that will be delivered the first week of July 2024.

To call a HubSpot contact using the connector, you will have to:

1 - Access the contact list



2 – Perform a Mouse Hover the phone number of the desired contact to be called:



You will see beside the Rainbow connector icon, the phone button to be clicked to launch the call to the selected contact:

5. Call log record in Contact Activity.

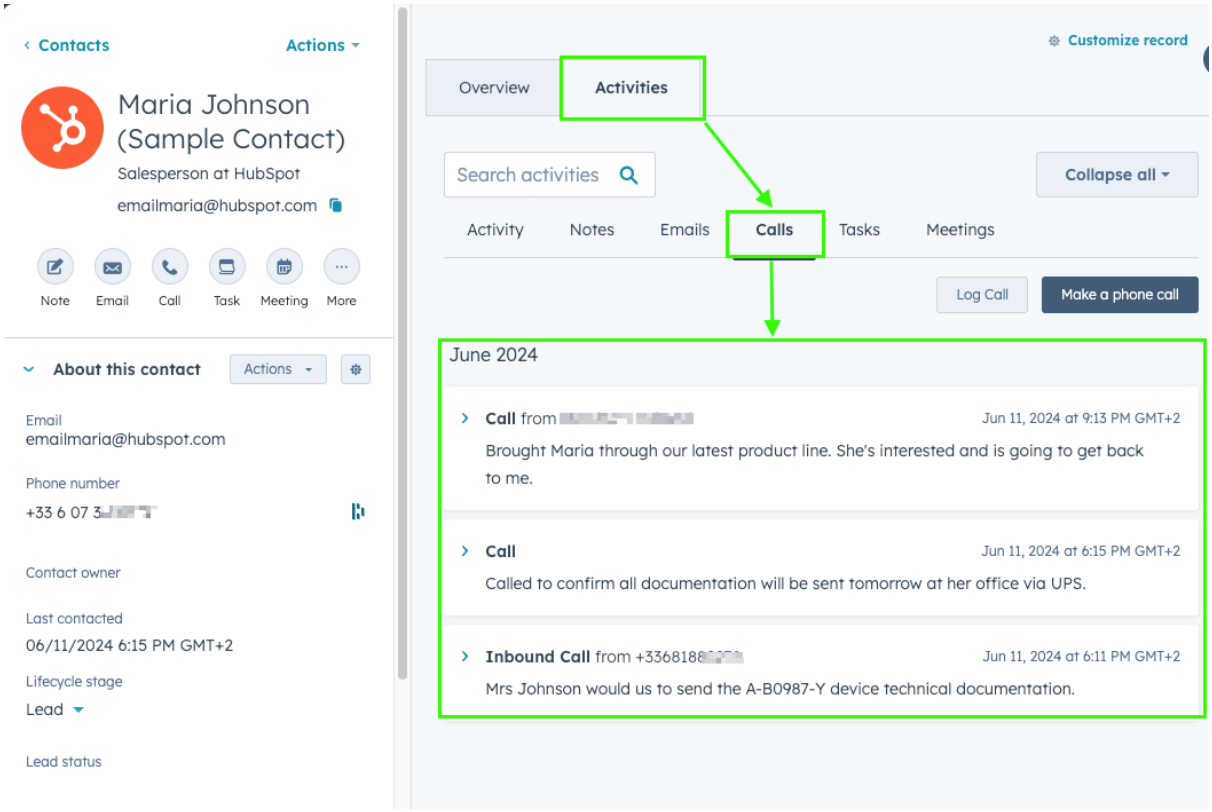
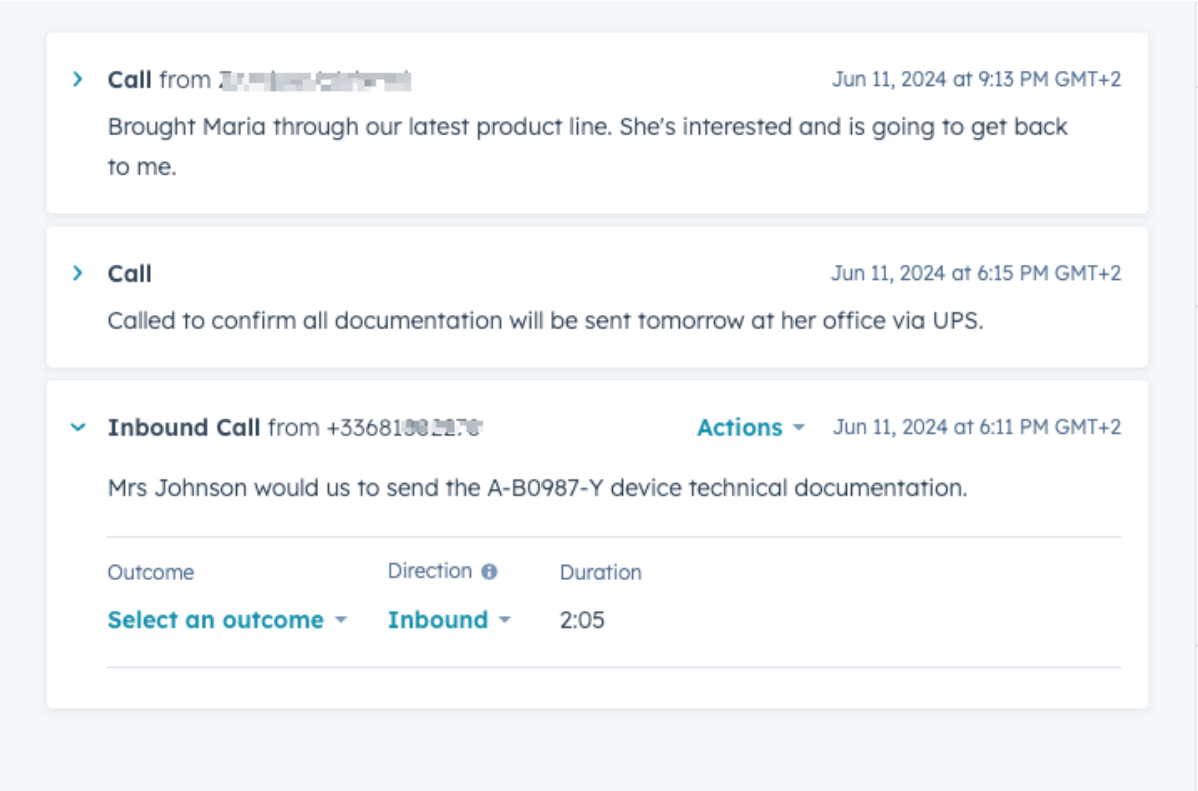
All calls performed from HubSpot, and the connector will be recorded after a call is finished (i.e. when the call is hanged up by any of the calling party (the caller or the recipient).

The call activity record will apply to incoming calls as well as outgoing calls.

The call log record will include:

- The date and time of the call
- The type of the call: Incoming, Outgoing
- The duration of the call
- The note content if created during the call by the HubSpot user

All call log record will be accessible from any contact record by selecting Activity, then Calls tab.



Expand any call activity record to access its full details: