

RAINBOW CRM BRIDGE – ZENDESK CRM DEPLOYMENT GUIDE

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# Rainbow CRM Bridge



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## 1 Document History

Edition	Date	Changes / Comments / Details
01	17/09/2021	Initial Deployment Guide
02	24/11/2021	<b>Section 3</b> A new section has been added and remaining sections have been renumbered.
03	27/09/2022	Legal Notice has been updated.
04	20/10/2022	<b>Section 5</b> New section about known limitations has been added.
05	07/11/2023	Legal notice has been updated. <b>Section 6</b> New section about troubleshooting has been added.

## 2 Introduction

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

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 Zendesk, you must ensure that following configuration requirements related to telephone system are fulfilled. Integration with Zendesk 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-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.

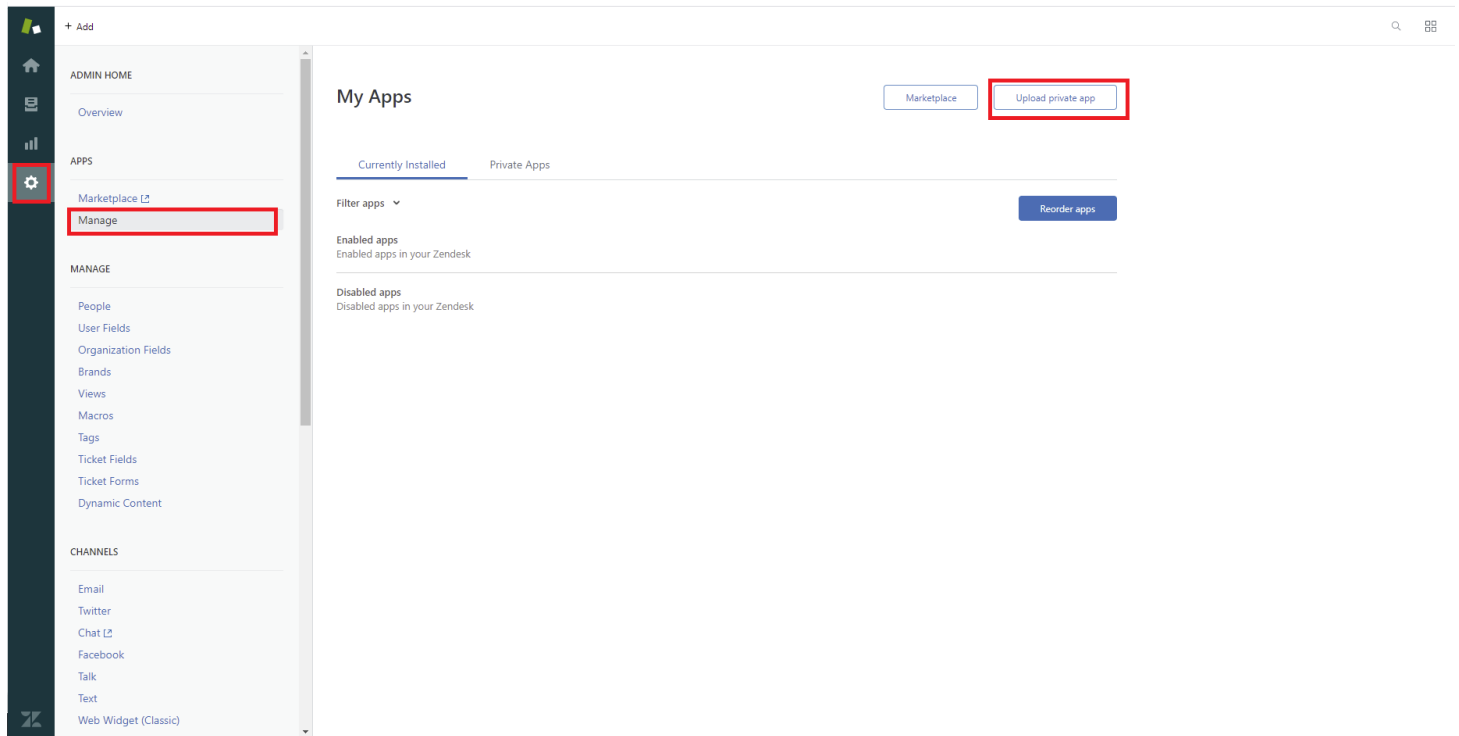
*TAPI, CSTA, SIP Trunk and other PBX specific licenses are essential pre-requisite for setting up CCCAgent and Rainbow CTI & Media Bridge application. Please check with your telephone system vendor for licenses status and their activation.*

## 4 Setting up Integration with Zendesk CRM


Open <https://support.zendesk.com/hc/en-us> and login using Zendesk credentials.

It will take you to the home screen. Please click admin  and then click Manage, it will open page in right

panel. Please click  button.



A new page will be shown in right panel. Provide App Name and choose **Rainbow CRM Bridge.zip** file to upload.

Click  button.

**IMPORTANT!!** The zip file will be part of package.

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**Upload App**

This is where you upload your private apps. Private apps appear in your account only. If you want to submit a public app or learn more about how to build your own private app, check out our Developer documentation.

App Name: Rainbow CRM Bridge  
This is seen when you list your app. Please follow the naming guidelines.

App File: **Choose File**  
Must be a .zip file. Max file size 2 MB.  
Do not include any secret passwords, keys, or tokens in your app's assets directory. Access to these files is not authenticated. See Secure Settings for more information.

Buttons: Cancel, Upload

**Upload App**

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App Name: Rainbow CRM Bridge  
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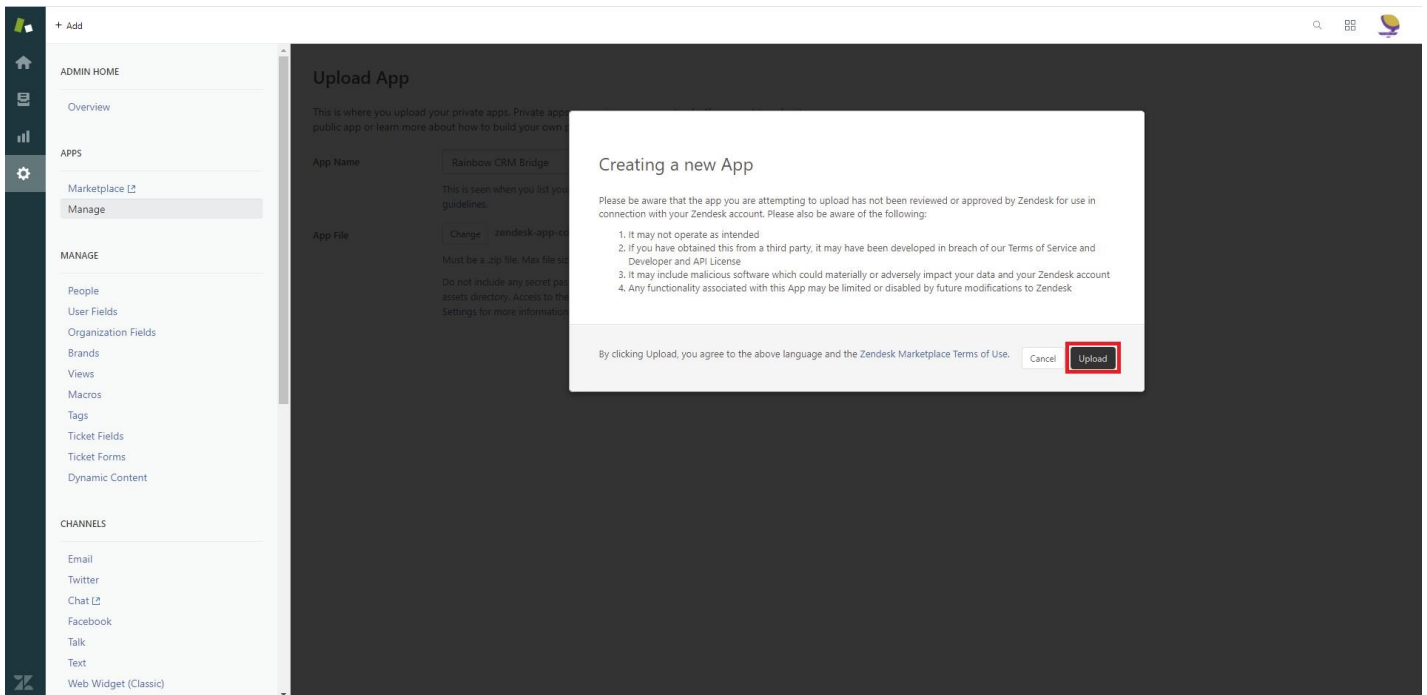
App File: Change Rainbow CRM Bridge.zip  
Must be a .zip file. Max file size 2 MB.  
Do not include any secret passwords, keys, or tokens in your app's assets directory. Access to these files is not authenticated. See Secure Settings for more information.

Buttons: Cancel, **Upload**

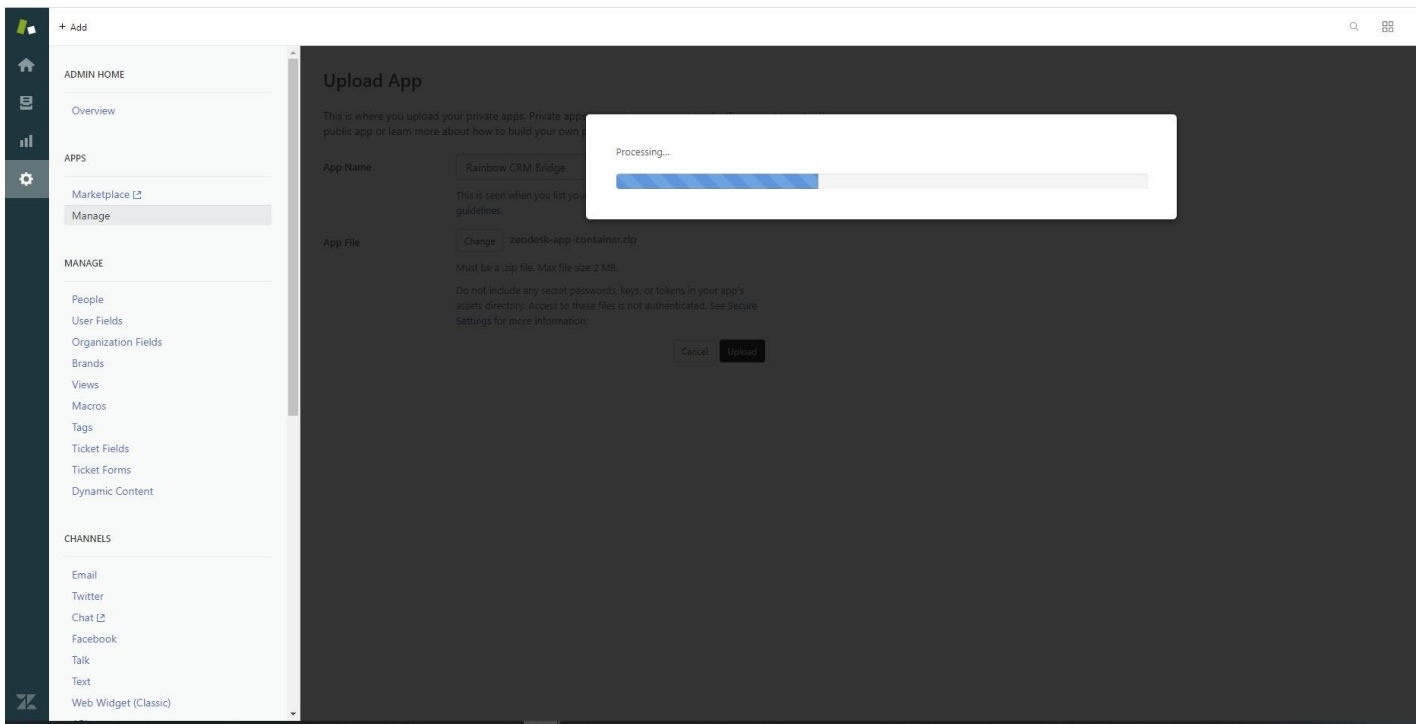
A dialog will be shown with a confirmation message. Click **Upload**



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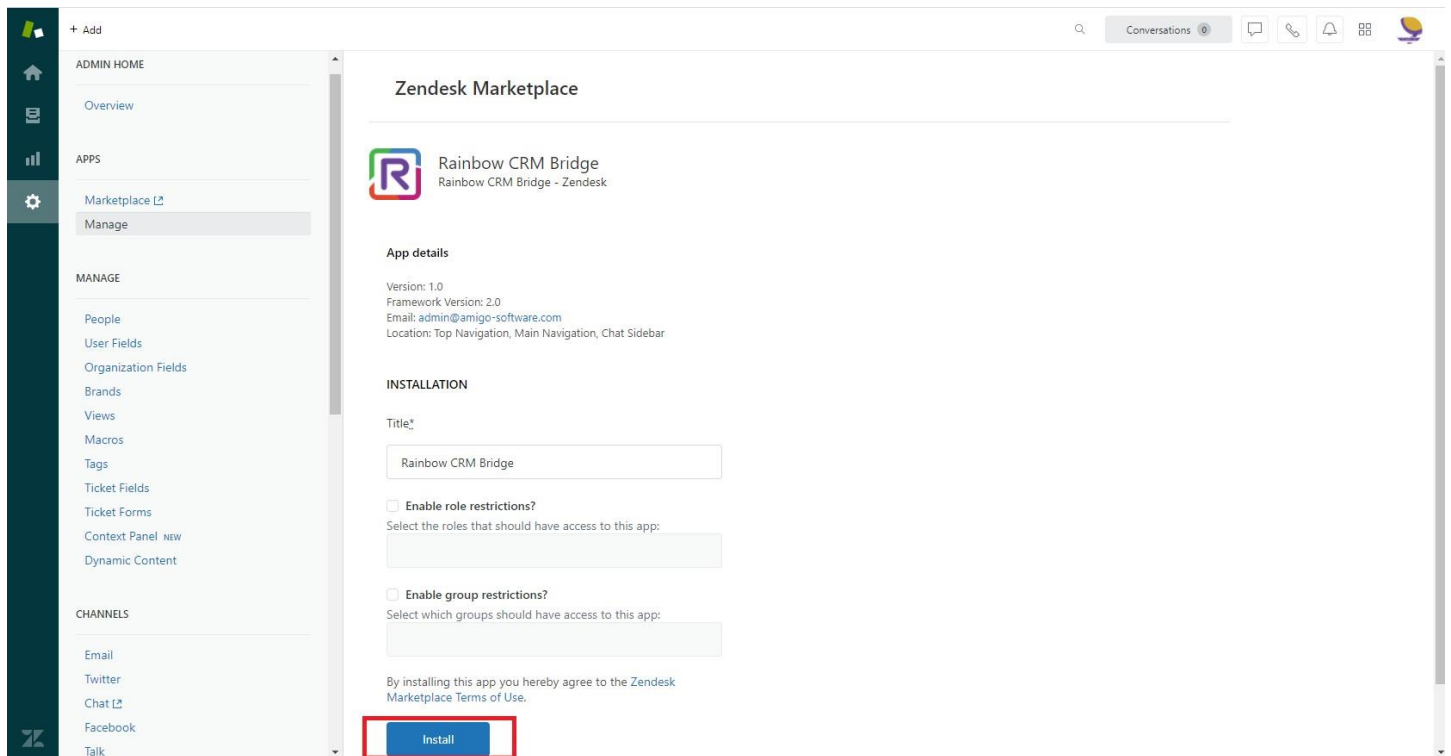



Now this will upload the app files.

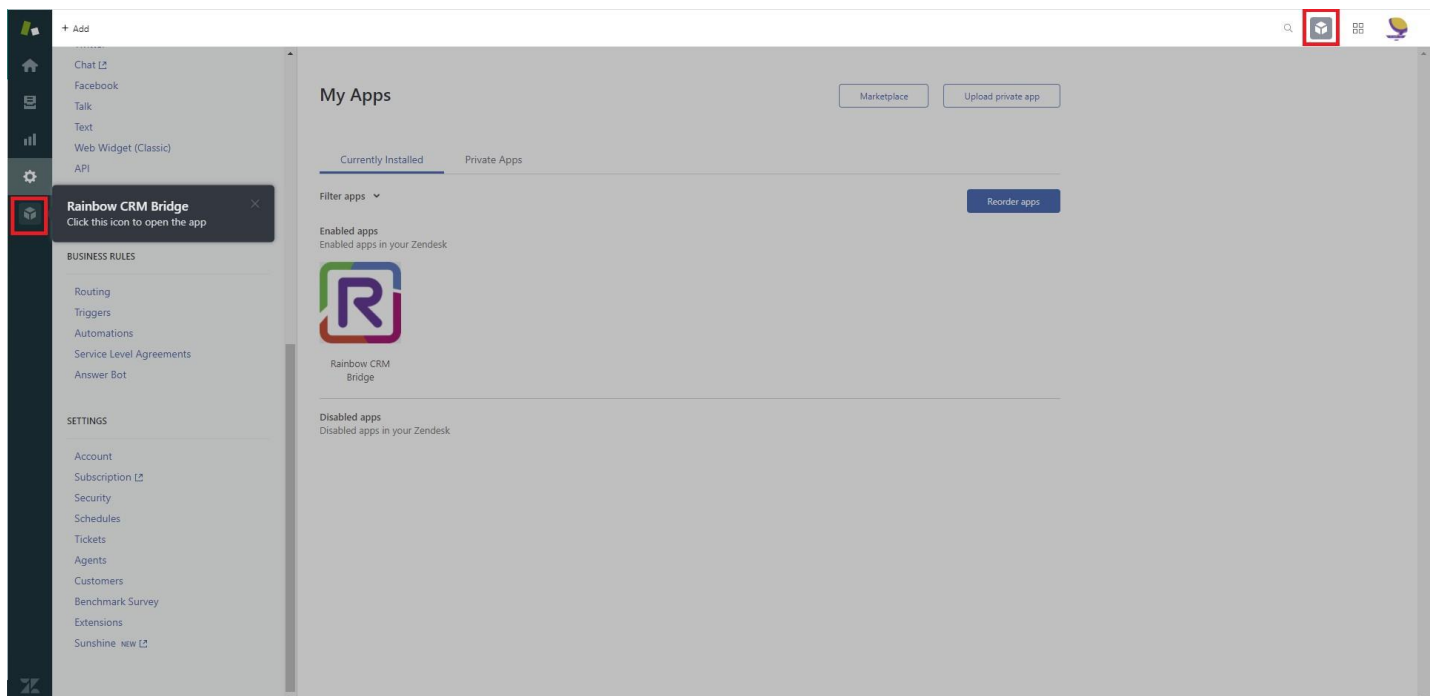



After the upload is complete, a new screen with app details will be displayed. Fill the form with information.

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Once information is provided, click  button. This will now install the app in Zendesk environment and next screen will be appeared with installed Rainbow app.



By clicking application icon  following Rainbow CRM Bridge application will be appeared in a pop-up window.

The screenshot displays the Rainbow CRM Bridge interface. On the left is a navigation sidebar with icons for home, dashboard, account, and settings. The main content area is titled 'Customer support channels' and includes a 'Your account' sidebar with links like 'Customer support channels', 'Add your team', 'Ticketing system', 'Live chat and messaging', 'Help center', 'Agent productivity', and 'About your trial'. The main content area has a heading 'Customer support channels' and a sub-heading 'See how Zendesk Suite works. It's ready to go with these essential elements that were made just for you.' Below this are three sections: 'Email' (with a note about sharing emails and a provided email address), 'Live chat and messaging' (with a note about connecting across web, mobile, and social), and 'Voice' (with a note about connecting with customers on the phone and a provided phone number). On the right side, a 'Rainbow CRM Bridge' login modal is open, featuring the Rainbow logo, a 'Welcome to Rainbow CRM Bridge' message, and a form with fields for 'Email address \*' and 'Password \*', a 'Connect' button, and a 'Keep my session alive' checkbox. The modal also includes a 'Sign up!' link and copyright information for ALE International.

## 5 Known Limitations

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

1. In case telephonic mode is set as Other Phone then all call controls on Rainbow CRM Bridge will be disabled.
2. For every CRUD operation performed, there is a delay in API response of few minutes.

## 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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