

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.
08	27/09/2023	Legal notice has been updated. Section 8 New section about troubleshooting has been added.
09	31/10/2025	Legal notice has been updated. Section 6.2 A note has been added about click to dial functionality. Screenshot has been added.
10	19/01/2026	Legal notice has been updated. Section 4 An important note about SSO feature 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.

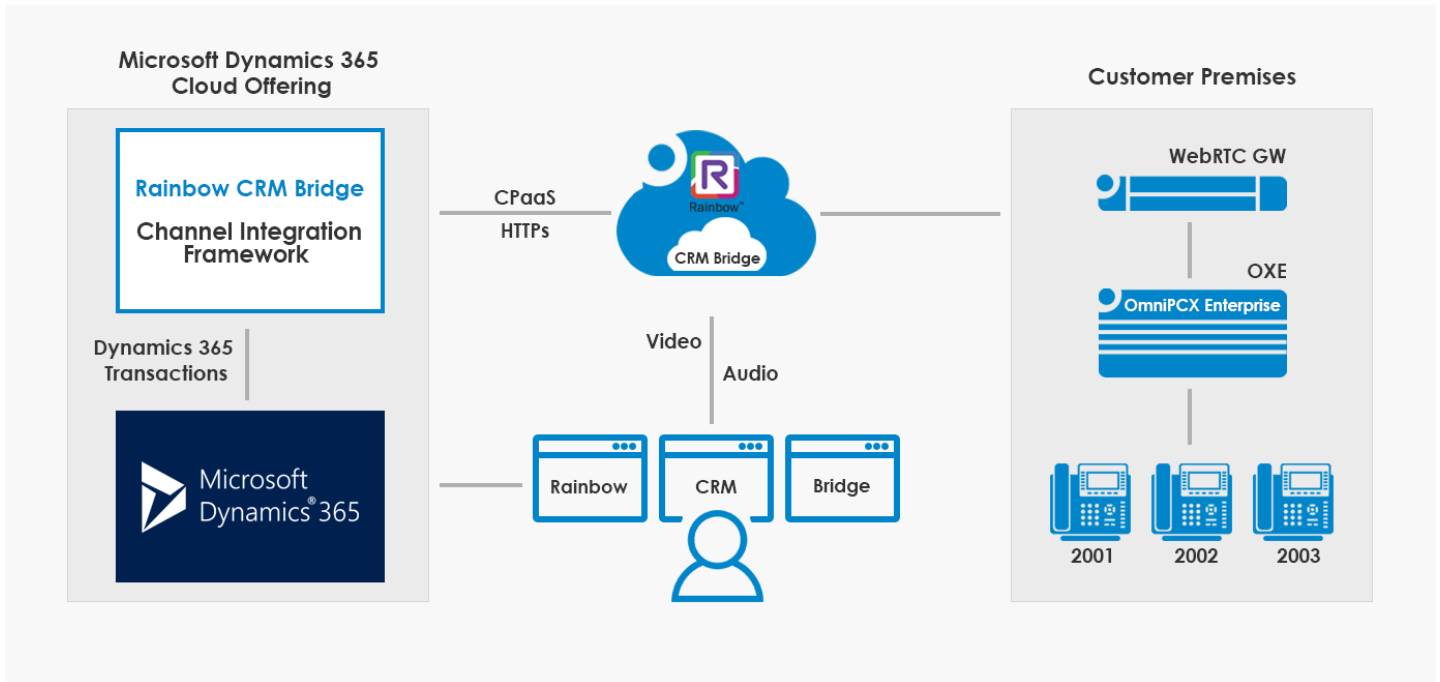
As soon as users are logged into their CRM User Interface, they are presented with the option to login on Rainbow Platform as well.

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.

Rainbow CRM Bridge - Deployment Design



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	o	o	o
Presence	o	o	o
Chat with Contacts	o	o	o
Rainbow to Rainbow Call (WebRTC)	o	o	o
Remote Call Control (CTI)	o	o	o
Phone Call History	o	o	o
VoIP (Computer) *	x	o	o
Nomadic Mode *	x	o	o
Click to Call	o	o	o
Screen Pop (Auto Search - Contact Search and Display)	o	o	o

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

IMPORTANT!! Rainbow CRM Bridge supports Single Sign-on (SSO).

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-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.

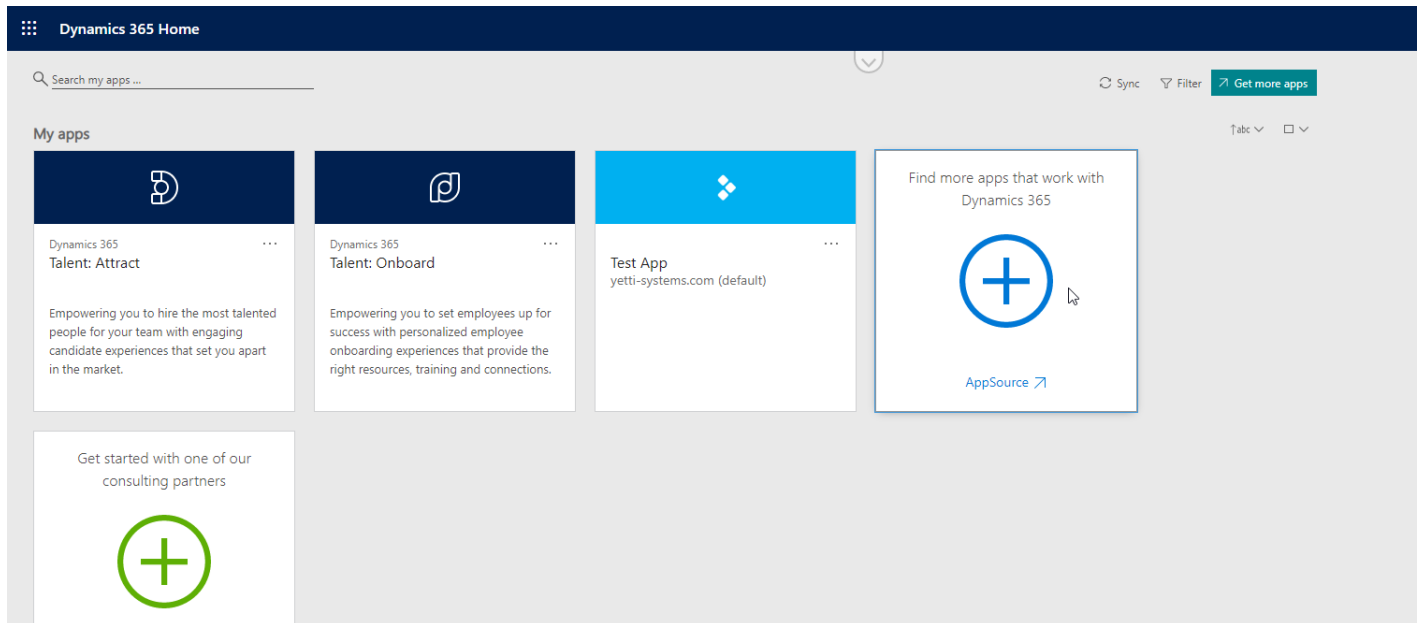
6 Setting up Rainbow CRM Bridge in MS Dynamics CRM

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

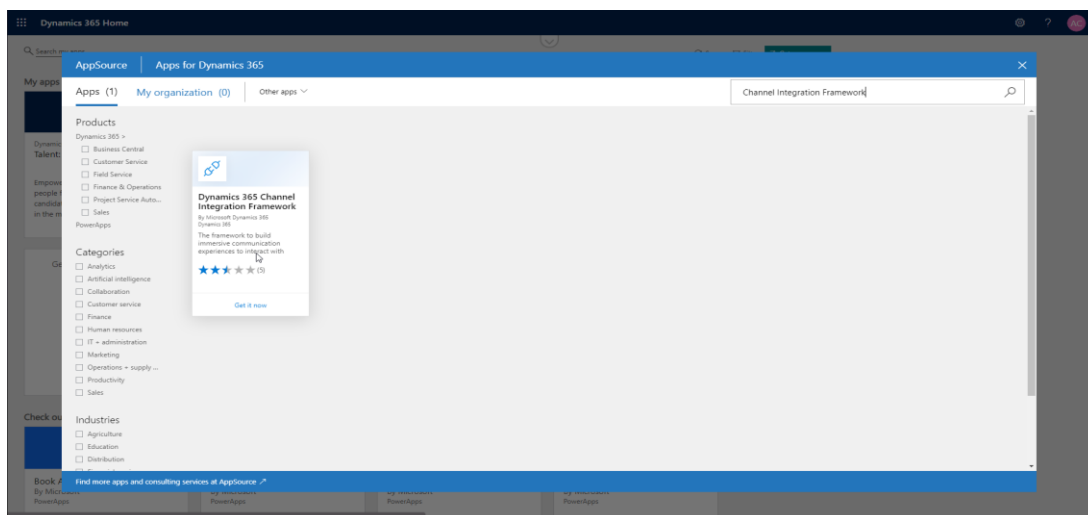
6.1 Channel Integration Settings

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.

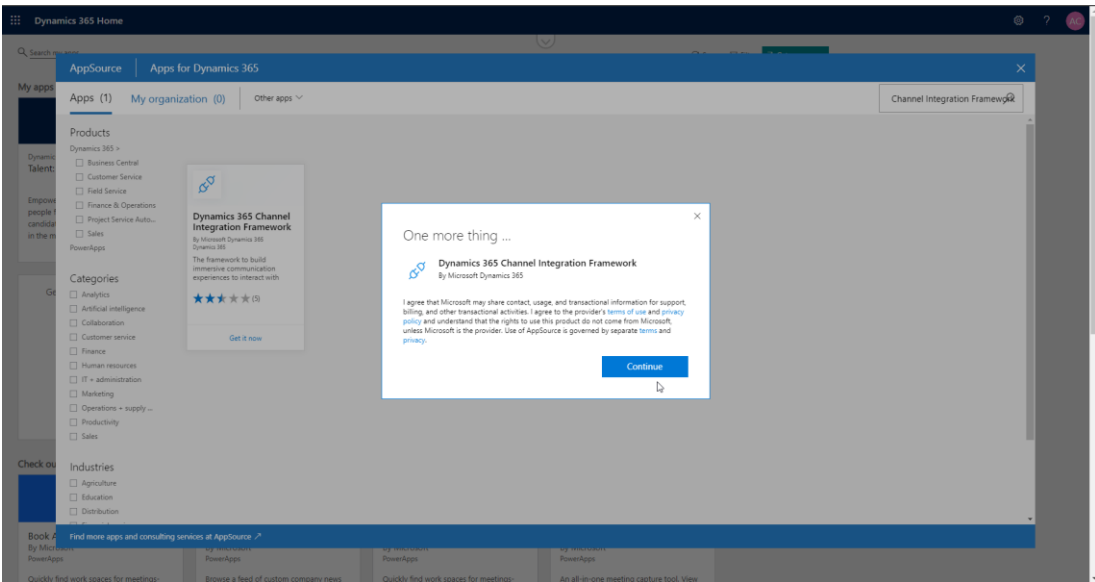
Step 1: Sign-in to MS Dynamics CRM and click box **Find more apps that work with Dynamics 365**



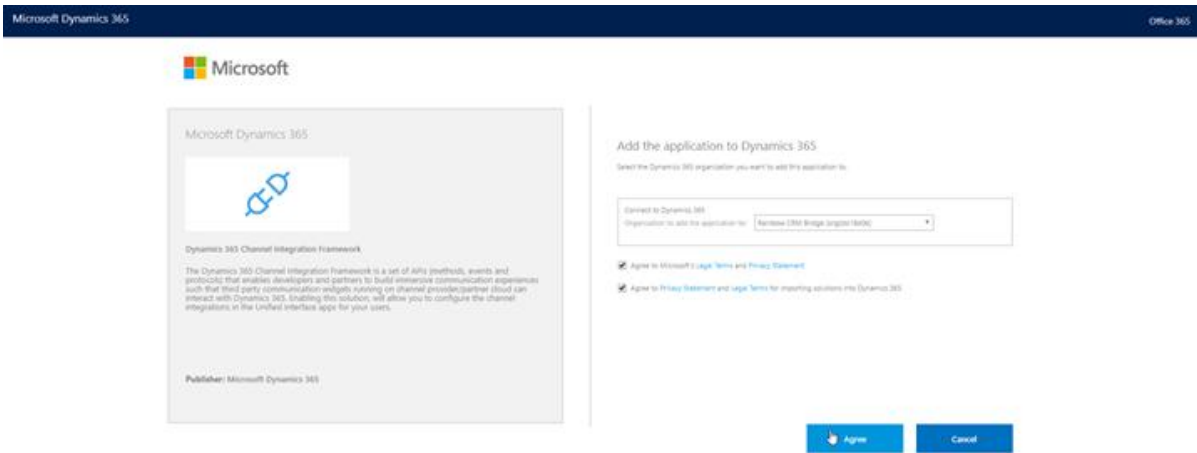
Step 2: Type 'Channel Integration Framework' in the 'Search Box'.



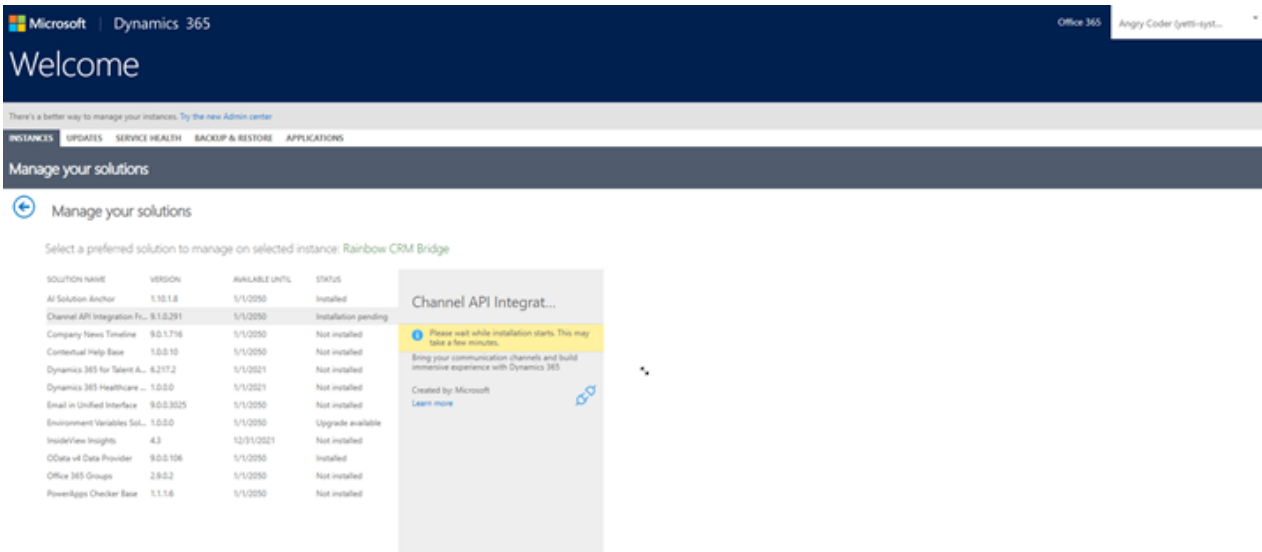
Step 3: Click **Continue** button to start with the installation process.



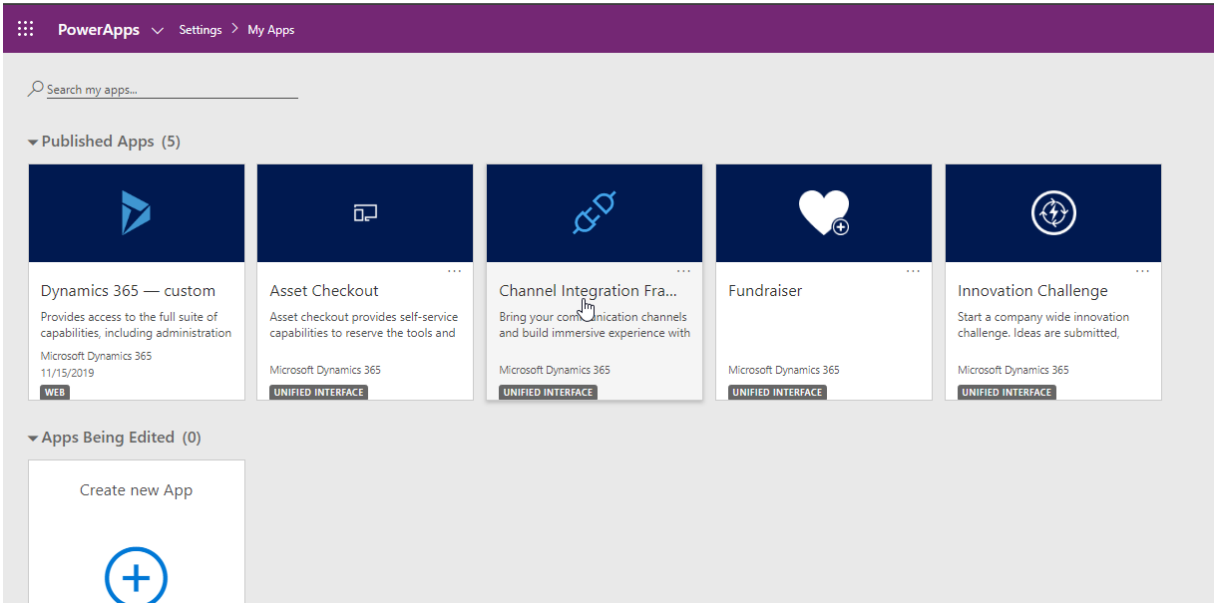
Step 4: Click **Agree** button to proceed with the installation.



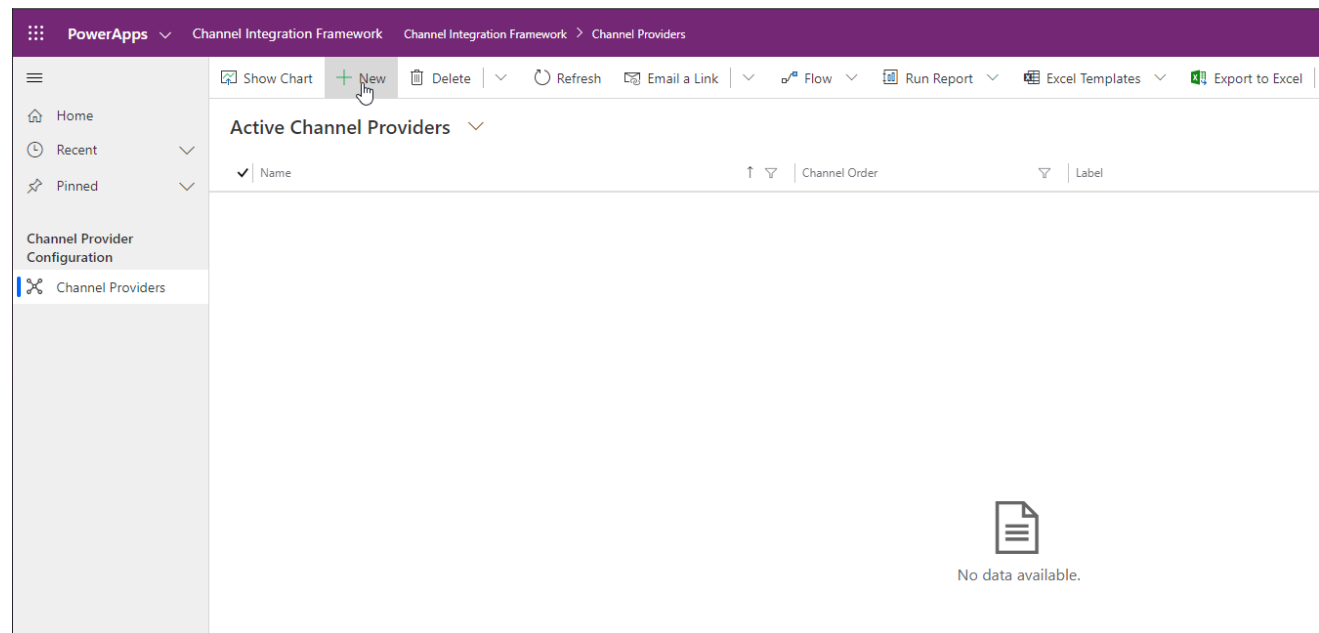
Step 5: Wait until the installation is complete. This normally takes a few minutes.



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



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



Provide following set of information for **New Channel Provider** section.

New Channel Provider

Channel Provider Configuration

Name

Rainbow CRM Bridge - MS Dynamics 365

Label

Rainbow CRM Bridge - MS Dynamics 365

Channel URL

https://rbc.quick-interact.com/edemomscrm/

Enable Outbound Communication

Yes

Channel Order

1

API Version

1.0

Trusted Domain

Custom Parameters

Select Unified Interface Apps for the Channel

Innovation Challenge

Enter text here

Select All

Asset Checkout

Fundraiser

Innovation Challenge

Select the Roles for the Channel

Enter text here

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.

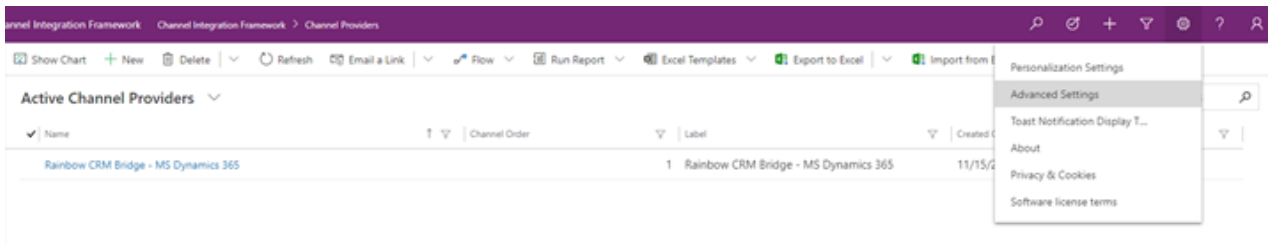
Once this 'Channel Provide' is created, Rainbow CRM Bridge will be available and ready to use in the selected application.

6.2 Configuring 'Click To Dial'

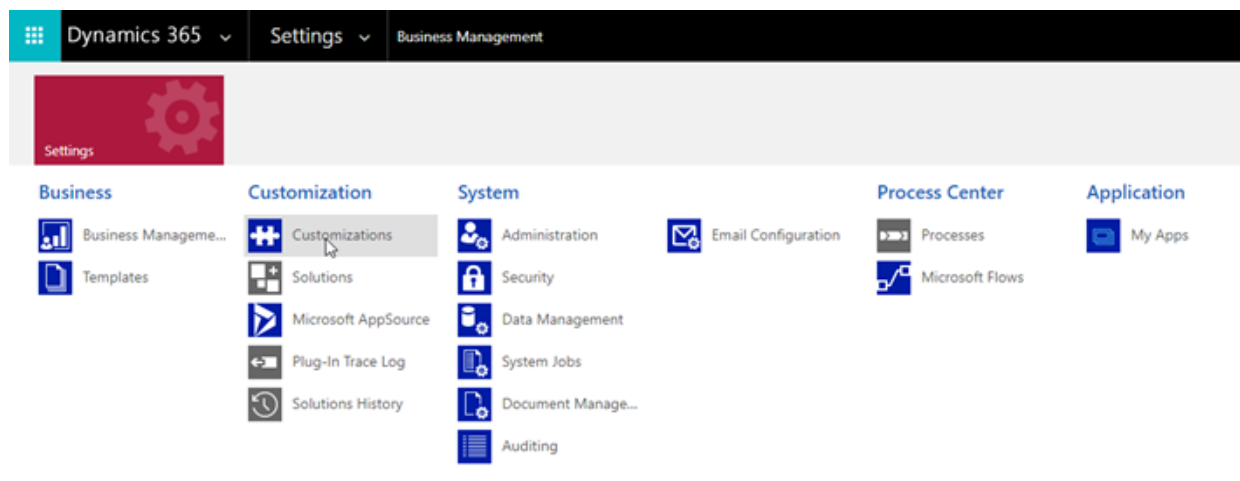
This component initialises the connectivity by creating a Rainbow WebSDK object in the application global memory space. The object is responsible to carry out all the transactions between CRM Bridge and Rainbow. The communication is made over secure web sockets and data transfer using circular JSON over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

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

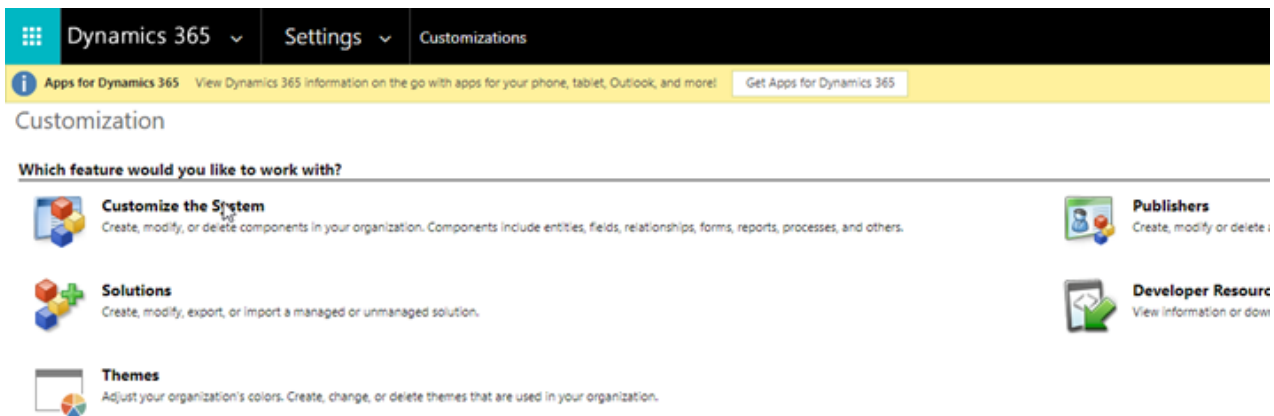
Step 1: In **Active Channel Providers** section, Click **Advanced Settings** option.



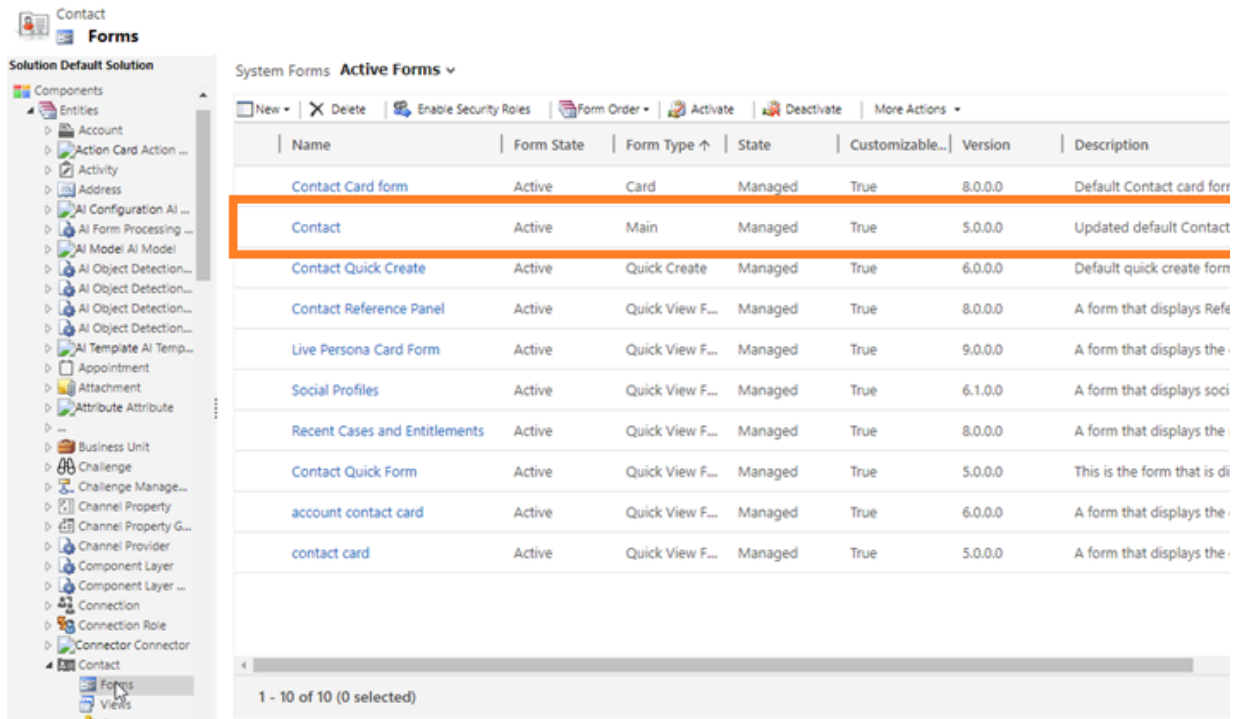
Step 2: Click **Settings** menu and then **Customizations** option.



Step 3: Click **Customize the System** link.

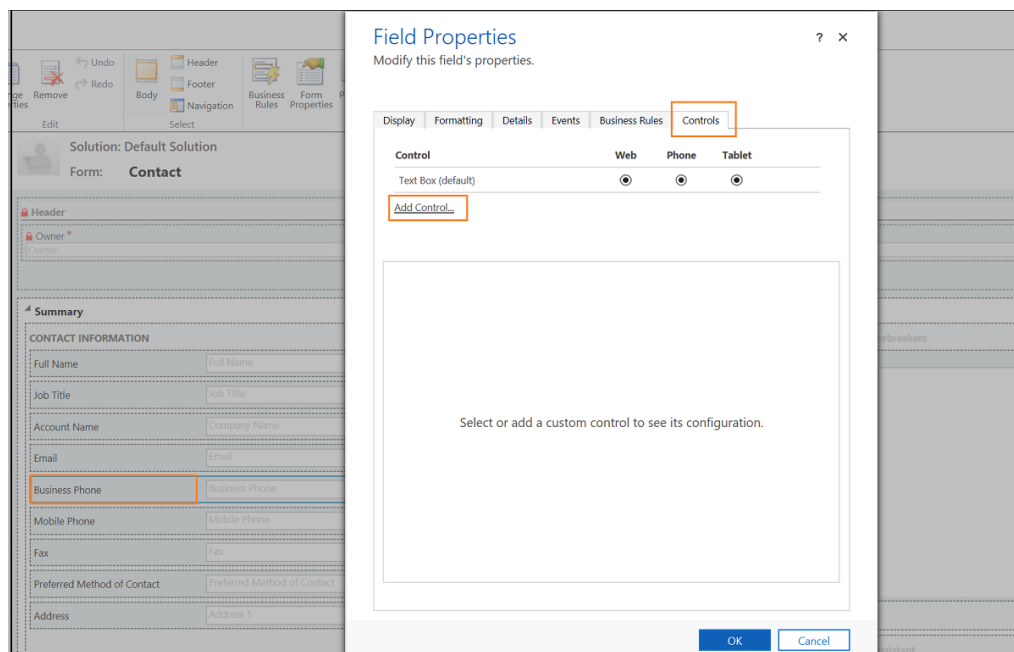


Step 4: From the left panel section, expand tree through **Entites** -> **Contact** and select **Forms** option. This will open the below screen.

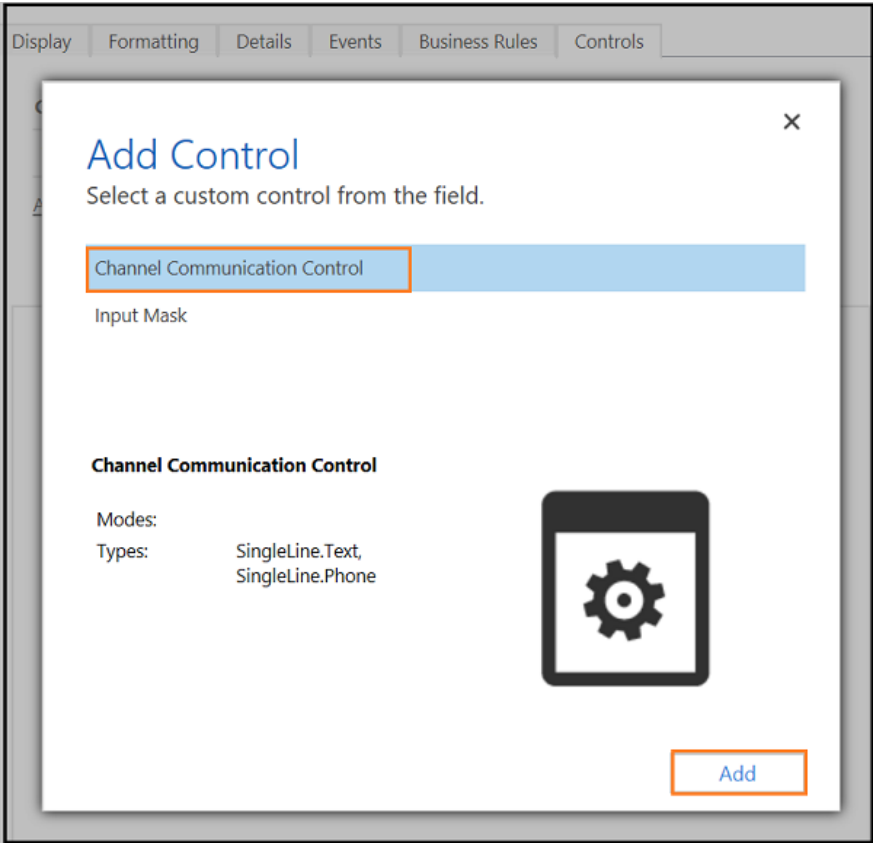


Click **Contact** row having Form Type **Main**. This will open the 'Contact' form in design mode.

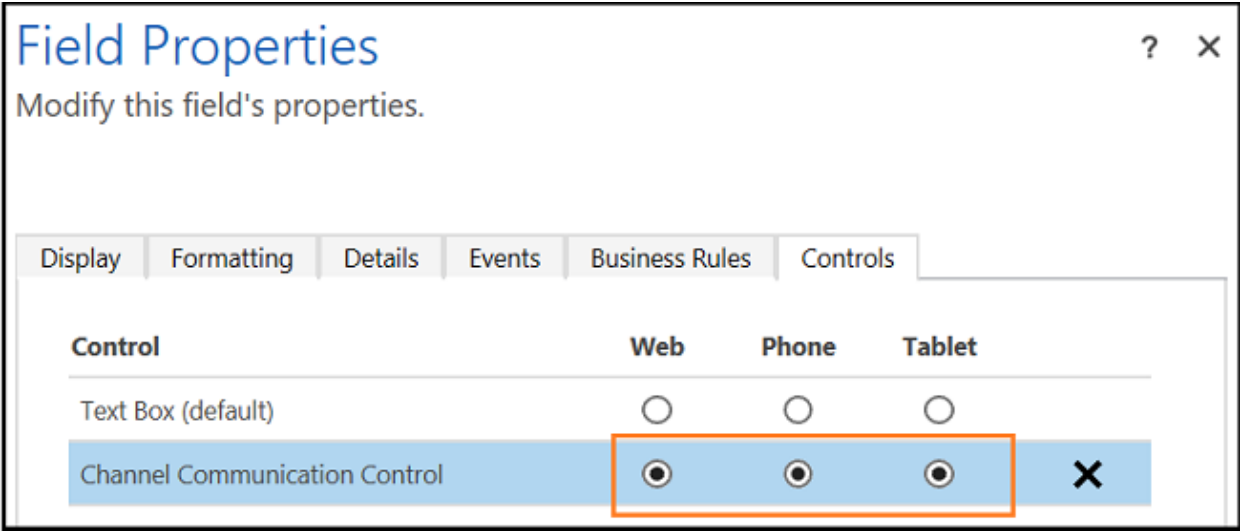
Step 5: Click **Business/Mobile** phone fields and this will open the form for these field properties. Under section **Control**, select 'Add Control' option.



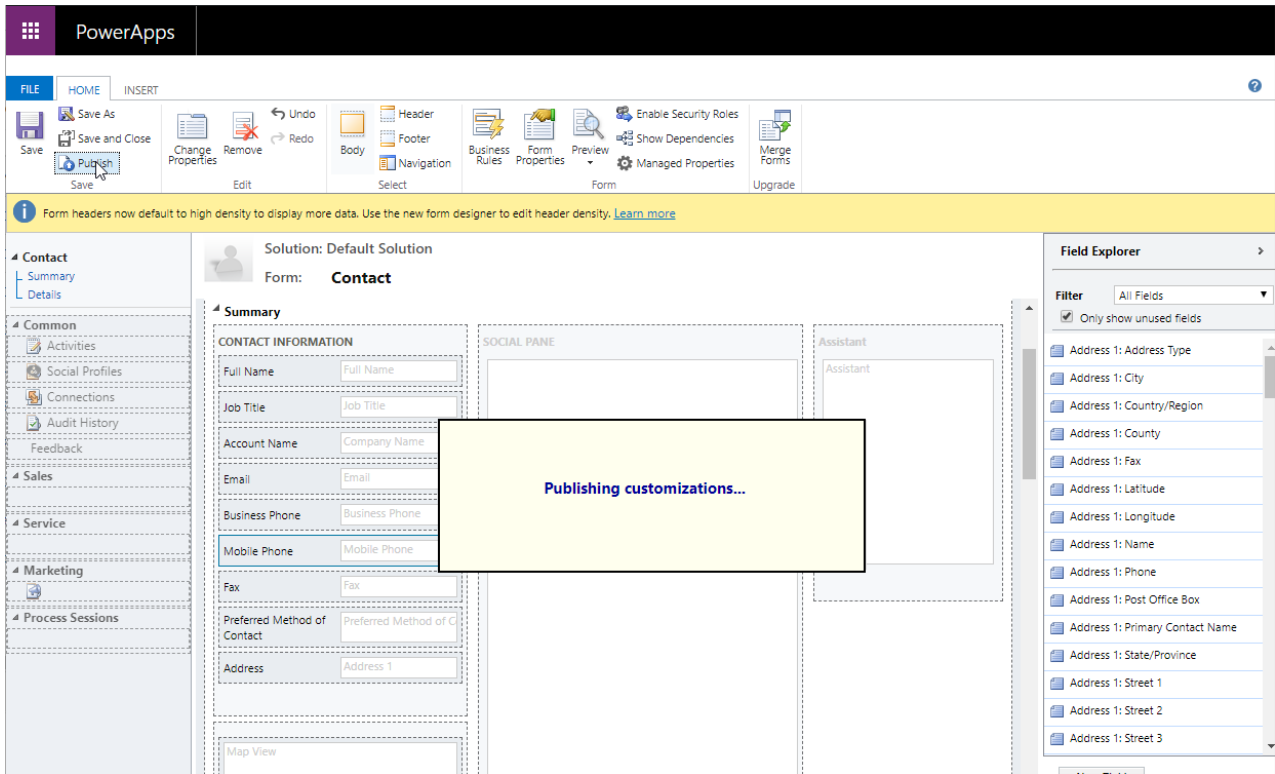
Step 6: Select **Channel Communication Control** option on the **Add Control** screen and click **Add** button.



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**.

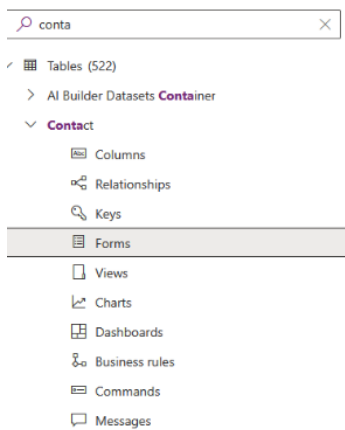


Step 8: Click **Save** and select **Publish** to publish all the customizations.



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.

Note: The same configuration steps apply across all forms in Microsoft Dynamics CRM, such as **Contact**, **Information**, and **Invite** forms as shown below. Ensure that the **Business Phone** field is configured for each relevant form that is being used. This field is required for the Click-to-Dial functionality to operate properly.



Default Solution > Tables > Contact > Forms

Name ↑	Form type	Status	Managed	Customized	Customizable
account contact card	Quick View	On	Yes	No	Yes
Contact	Main	On	Yes	Yes	Yes
contact card	Quick View	On	Yes	No	Yes
Contact Card form	Card	On	Yes	No	Yes
Contact Quick Create	Quick Create	On	Yes	No	Yes
Contact Quick Form	Quick View	On	Yes	No	Yes
Contact Reference Panel	Quick View	On	Yes	No	Yes
Information	Main	On	Yes	Yes	Yes
Invite Web Form	Main	On	Yes	No	Yes
Live Persona Card Form	Quick View	On	Yes	No	Yes
Portal Contact (Enhanc...	Main	On	Yes	No	Yes
Profile Web Form (Enha...	Main	On	Yes	No	Yes
Profile Web Form (Enha...	Main	On	Yes	No	Yes
Recent Cases and Entitl...	Quick View	On	Yes	No	Yes

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.

8 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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