

RAINBOW CRM BRIDGE – HUBSPOT CRM DEPLOYMENT GUIDE

Rainbow CRM Bridge





Legal Notice

Alcatel-Lucent Enterprise, ALE International and the Alcatel-Lucent Enterprise logo are trademarks of ALE International. Allother trademarks are the property of their respective owners. The information presented is subject to change without notice. ALE International assumes no responsibility for inaccuracies contained herein.

Copyright © 2024 ALE International - All rights reserved.

Index

1	DOCUMENT HISTORY	4
2	INTRODUCTION	5
3	GETTING STARTED	6
	3.1 Installing Browser Extension	6
	3.2 Configuring Browser Extension for the first time	7
	3.3 Log in HubSpot CRM	8
	3.4 Browser Extension – Starting up & SSO Configuration	9
4	RAINBOW SUBSCRIPTION & SUPPORTED PBXS	19
5	ICON GLOSSARY	20
6	TROUBLESHOOTING	21

1 Document History

Edition	Date	Changes / Comments / Details	
01	10/10/2023	nitial 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-forhu/empnokmbbkhefagacpkcklmhboijnbco

Following page is displayed:



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



Following pop-up is displayed:

ALE International proprietary and confidential. Copyright © 2024. All rights reserved.



a chrome web store	chrome web store Add "Rainbow CRM Bridge for HubSpot"?	
Home > Extensions > Rainbow CRM Bi	It can: Read and change all your data on all websites Display notifications	
Rainbow CRM B ⊘ openrainbow.com ★★★★★ ○ ① Pro	Add extension Cancel	Checking
Overview	Privacy practices Reviews Support	Related

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

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

chrome.google.com/webstore/detail/raint	oow-crm-bridge-for-hu/empnokmbbkhefagacpkcklmhboijnbco/rel	lated	r 🛧 🖻	* •
chrome web store	chrome web store			om 🗸
Home > Extensions > Rainbov	v CRM Bridge for HubSpot		Manage your extensions by clicking Extensions in the Tools menu.	
Rainbow CRM Bridge for HubSpot				1
	Overview Privacy practices Reviews St	upport	Related	

3.2 Configuring Browser Extension for the first time

1. Click on the ¹ 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 ¹ 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:

	● 🖻 🖈
Alleria	×
Allow	to open
all web+rainbowrcb links?	
O Allow	
O Deny	
Ignore	
Manage	Done

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 <u>HubSpot API</u> <u>Configuration</u> section.
- App Secret: Please provide Client Secret in this field. In order to extract this information, see <u>HubSpot</u> <u>API Configuration</u> 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:

🔮 English 🎽	Log in Create of	a developer account
HubSpot Developers	Documentation v Resources v	Marketplace 🔻
Customizing HubSpot is easier than ever for a	developers. Find out more	
Build. Launch. Grow. Create apps and websites to help businesses around the world grow better. Create a developer account PF docs CHS docs		

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





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



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



Give yo	ur develope	er account a uniq	ue name.
	Company name		
			-
		Next >	

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

	00		
Welcome to	HubSpot App D	evelopment	
	First time here? Let's get started!		
What are you here	to do?		
what are you here	10 00?		
		<u>A</u>	
Build something for many	Build something for one account	Test things out	
I'm building an app that other HubSpot customers	I'm building a custom integration for just my team	I'm here to create a HubSpot test account.	
	Skip thi	s, I'll explore on my own >	

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:

<u> </u>	Create an ann	8	Croate a test account
	Ready to build an app? Start here.		Create a test HubSpot account to try
			out APIs and integrations.

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



Getting started	Ready to deploy your app? Every app needs a valid install URL to connect an account. Go to auth settings to get started.	×
Basic info		
Contact & support	App Info Auth	
Monitoring	Public app name *	
Features	RainbowCRMBridge	
CRM cards	184 characters	
Timeline events		
Webhooks	App logo A square logo that will be used to identify your app. A logo is	
App settings	required to get your app certified and listed in the Marketplace.	
	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:

9 Getting started	Ready to deploy your app? Every app needs a valid install URL to connect an account. Go to auth settings to get s
Basic info	
Contact & support	App Info Auth
Monitoring	Bublic app name *
	 This name will appear in HubSpot tools, App Marketplace listings, and other material.
Features	RainbowCRMBridge
CRM cards	184 characters
Timeline events	
	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	S. Copy
Client ID This ID is unique to your app and is used for initiating OAuth.	Сору
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	https://app.hubspot.com/oauth/authorize? <u>client_id</u> & redirect_uri=http://localhost&scope=oauth Copy full URL
ontional scopes you've configured	

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	+ Add redirect URL
this list, users will get an install error.	https:// hubspot.openrainbow.io
http://localhost is also supported.	
Learn more about redirect URLs 🖉	
Turn on advanced scope settings	
Advanced scope settings allow you to set required, conditionally required	l, and optional scopes for your app. When this setting
is turned on, only the scopes you've configured can be listed in your insta	Il 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



Rainbow CRM Bridge – HubSpot CRM Deployment

terre and determine the second of	Add new scope	
	Find a scope	۹
THE OWNER OF TAXABLE PARTY AND ADDRESS OF TAXABLE PARTY.	✓ CRM	
Test	crm.dealsplits.read_write	
STREET, STREET, ST.	crm.export	
And Street of Concession, Name	crm.1mport	
NAMES OF TAXABLE PARTY.	crm.lists.read	
A REPORT OF THE OWNER OF THE OWNE	crm.lists.write	
NAMES AND ADDRESS OF	crm.objects.carts.read	
The second se	crm.objects.carts.write	
	crm.objects.commercepayments.read	
NAMES AND POST OFFICE ADDRESS OF TAXABLE PARTY.	crm.objects.companies.read	
And in case of the second s	crm.objects.companies.write	-
And a second	crm.objects.contacts.read	
the second secon	crm.objects.contacts.write Required	X
A succession of the second second	Update Cancel	

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:

	Turn on advanced scope settings Advanced scope settings allow you to set required, cond is turned on, only the scopes you've configured can be lis cause installs to fail.	itionally required, and optional scopes for your app. When this set sted in your install URL. Listing additional scopes in your URL will	ting	~
	Scopes Scopes determine the permissions your app has to acce installing your app must approve the scopes it requests. possible for your app's functionality. Learn more &	ss data or perform actions in HubSpot. People It's strongly encouraged to require as few scopes as	+ Add new s	соре
	 Required scopes (5) Always required for all app installs. Required scopes m 	nust be listed in the scope query parameter of the install URL.		
	crm.objects.companies.read		Required -	Delete
	crm.objects.companies.write		Required -	Delete
	crm.objects.contacts.read		Required -	Delete
	crm.objects.contacts.write		Required -	Delete
	oauth		Required -	Delete
	✓ Conditionally required scopes (0)			
	May be required for app installs based on the install U install URL. If the user or account doesn't have access	JRL. Conditionally required scopes can be listed in the scope que s to a requested scope, they won't be able to install the app.	ry parameter of t	he
	No conditionally required scopes selected			
Save changes Discard	You've changed 2 settings.			

Click on the Save Changes button.

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

Client ID This ID is unique to your app and is used for initiating OAuth.	Сору
Client secret Used to establish and refresh OAuth authentication.	Show Copy



15. 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:

Rainbow CRM Bridge				6	Q People_ #	
Choose an account					P Please pr	covide company configuration for
NAME	DETAILS				Hubspot	onac company company of
07		u'il need it to make certain	API calls.		Client Id	quired:
۲		nd is used for initiating OA	uth.	f0265e84-86b6-4376-b3fe-784c	App Secret	
Choose Account		Auth authentication.		4e89aca4-ff43-4c5c Hide Copy		Save Cancel
		Sample install UPI (OAuth)				
		Sample install URL (OAuth) A user will need an install URL like this one to install your of Install URLs are generated based on the app credentials, redirect URL, and scope configuration found on this page.	https://app.hul	ospot.com/oauth/authorize?	Copy full URL	
		Sample install URL (OAuth) A user will need an install URL Bit this one to install your c 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 an optional scopes you've configured. Learn more about OAuth [2]	https://app.hul ny redirect_uri=h	ospot.com/oauth/authorize? eit https://red-hubspot.openrainbow	Copy full URL	
		Sample install URL (OAuth) A user will need on install URL is this ione to install your c 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 an optional scopes you've configured. Learn more about OAuth 62 Redirect URLs Users must be redirected to one of these locations after g access to your app. If your install URL contains a redirect	pp. https://opp.hul ny redirect_uri=t	ospot.com/oauth/authorize? en	Copy full URL	
		Sample install URL (OAuth) A user will need an install URL. But this one to install your classall 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 an optional scopes you've configured. Learn more about OAuth 2 [®] Redirect URLs Users must be redirected to one of these locations aredirect this list, users will get an install URL contains a redirect this list, users will get an install error. http://localhost_is also supported.	pp. https://opp.hul redirect_uri=t ronting that's not in https://	red-hubspot.openrainbow.io	Copy full URL	

16. 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

, X	Q. Search HubSpot Ctrll K の % 出 ② 袋 ル • •			oow okivi biluge —	
88	кипромскирнаде	to explore the developer documentation C	J	Q People,	
	This app is requesting access to your HubSpot account. Continue connecting if you agree.	© you to set required, conditionally required, and optional scopes for your app. When this setting	合 早		
	Manage and view your CRM data	vive configured can be listed in your install URL. Listing additional scopes in your URL will	0	Please provide company configuration f	or
_	View properties and other details about contacts.		l B	Hubspot	_
e	Create, delete, or make changes to contacts.		v*	These details are required:	
G	View properties and other details about companies. Create, delete, or make changes to companies.	ons your app has to access data or perform actions in HubSpot. People ve the scopes it requests. It's strongly encouraged to require as few scopes as jality. Learn more [2]		Client Id	
	🔅 Basic HubSpot account information		~~·	App Secret	
:00	This includes your user email address and the account's primary domain.	nstalls. Required scopes must be listed in the scope query parameter of the install URL.			
	Connect opp Cancel	read		Save	
	or involution of the concomponent	write			
	crm.objects.contacts crm.objects.contacts oauth	.read	Require	sd ▼ Delete	

17. 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 Versio		
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.



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.

Image: 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	s			
Node Num Insta	ber (reserved) nce (reserved) Timer No.		1 1 384	
	Timer units	:	0	



enterprise.alcatel-lucent.com

Alcatel-Lucent Enterprise and the Alcatel-Lucent Enterprise logo are trademarks of ALE Holding. To view other trademarks used by affiliated companies of ALE Holding, visit:enterprise.alcatel-lucent.com/trademarks. All other trademarks are the property of their respective owners. The information presented is subject to change without notice. Neither ALE Holding nor any of its affiliates assumes any responsibility for inaccuracies contained herein