



RAINBOW CRM BRIDGE – ZENDESK CRM DEPLOYMENT GUIDE

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	Section 3				
		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	Section 5				
		New section about known limitations has been added.				
05	07/11/2023	Legal notice has been updated.				
		Section 6				
		New section about troubleshooting has been added.				
06	13/06/2024	Section 4				
		An important note about talk enterprise has been added.				
		A screenshot has been added.				
07	22/07/2024	Section 4				
		A note about app file 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 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.

4 Setting up Integration with Zendesk CRM

Open <u>https://support.zendesk.com/hc/en-us</u> 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 clic	ck Upload private app button.	
	+ Add		Q. 88
♠ 8	ADMIN HOME	My Apps Upload private app	
ul ¢	APPS Marketplace [2	Currently Installed Private Apps	
	Manage	Enabled apps Enabled apps in your Zendesk	
	People User Fields Organization Fields Brands Views	Disabled apps Disabled apps in your Zendesk	
	Macros Tags Ticket Fields Ticket Forms Dynamic Content		
	CHANNELS		
x	Email Twitter Chat L2 Facebook Talk Text Web Widget (Classic)		

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

upload. Click ^{Upload} button.

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

Note: The country code can be managed through the application file; however, this requires specific configuration changes within the file. Please contact ALE Level 3 Support to perform these configurations.





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

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Now this will upload the app files.

-	+ Add		Q 88
↑ ₽	ADMIN HOME Overview	Upload App This is where you upload your private apps, Private apps?	
ul ¢	APPS.	public app of learn more about how to build your own a Processing App Name Rainbow CRM Bridge	
	Marketplace 🖸	The is seen when you listly ou quidelines.	
	Manage	App File Change Zondiesk-app-container.ztp Must be a .zip file. Max file size 2 Mb.	
	People User Fields Organization Fields Brands Views Macros Tags Ticket Fields Ticket Forms Dynamic Content CHANNELS	Do not include any secret passwords, keys, or takens in your app's assets dreatory. Access to There files is not authenticated. See Secure Settings for more information. Center Update	
ZK	Email Twitter Chat L2 Facebook Talk Text Web Widget (Classic)		

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

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1.	+ Add		Q	Conversations	φ.	88	9
A	ADMIN HOME	7 Marketter					
2	Overview	Zendesk Marketplace					
al	APPS	Rainbow CRM Bridge					
¢	Marketplace 🖉						
	MANAGE	App details Version: 1.0					
	People User Fields	ramework version: 2.0 Email: Adming Amigo-schware.com Location: Top Navigation, Main Navigation, Chat Sidebar					
	Organization Fields Brands	INSTALLATION					
	Views Macros	Title."					
	Tags	Rainbow CRM Bridge					
	Ticket Fields Ticket Forms Context Panel NEW	Enable role restrictions? Select the roles that should have access to this app:					
	CHANNELS	Enable group restrictions? Select which groups should have access to this app:					
	Email Twitter Chat (2	By installing this app you hereby agree to the Zendesk Marketplace Terms of Use.					
X	Facebook Talk 🔹	Install					

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

1.	+ Add			ې 😖 😖
↑ 5	Chat L? Facebook Taik Text	Му Аррз	Marketplace Upload private app	^
\$	Web Widget (Classic) API	Currently Installed Private Apps		
4	Rainbow CRM Bridge × Click this icon to open the app BUSINESS RULES	Filter apps V Enabled apps Enabled apps in your Zendesk	Reorder apps	
	Routing Triggers Automations Service Level Agreements Answer Bot	Rainbow CRM Bridge		
XK	SETTINGS Account Subscription [2 Subscription [2 Subscription [2 Subscription [2 Subscription [2 Customers Benchmark Survey Extensions Sunshine www [2]	Disabled apps Disabled apps in your Zendesk		

By clicking application icon

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





IMPORTANT!! In order to properly configure Click2Call functionality of Rainbow CRM Bridge, Talk Enterprise or any other telephonic application should be disabled in Zendesk CRM as highlighted below:

Talk Enterprise 5 Talk agents · 1 of 5 Talk agents enabled. Edit Talk agents								
Settings	Lines	Business verification	Addresses	Greetings	Blocked numbers	IVR	Widget	Dashboard
Enable Ta Enabling accept vo	lk Talk allows age icemails with t	ents to make themselves avail his setting disabled.	able to answer call:	s. Your phone numb	per can			

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) Instance (reserved)	••••••	1
Timer No.	:	384
Timer units	:	0

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