

RAINBOW CRM BRIDGE – INSIGHTLY CRM DEPLOYMENT GUIDE

Rainbow CRM Bridge



Rainbow™

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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 | 8 |
| 3.3 | Log in Insightly CRM | 9 |
| 3.4 | Browser Extension – Starting up & SSO Configuration | 10 |
| 3.4.1 | Insightly API Configuration | 12 |
| 4 | RAINBOW SUBSCRIPTION & SUPPORTED PBXS..... | 13 |
| 5 | ICON GLOSSARY..... | 14 |
| 6 | TROUBLESHOOTING | 15 |

1 Document History

| Edition | Date | Changes / Comments / Details |
|---------|------------|----------------------------------|
| 01 | 26/07/2024 | Initial Deployment Guide created |

2 Introduction

Rainbow CRM Bridge acts as a middleware that connects the third-party CRM, Insightly 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.

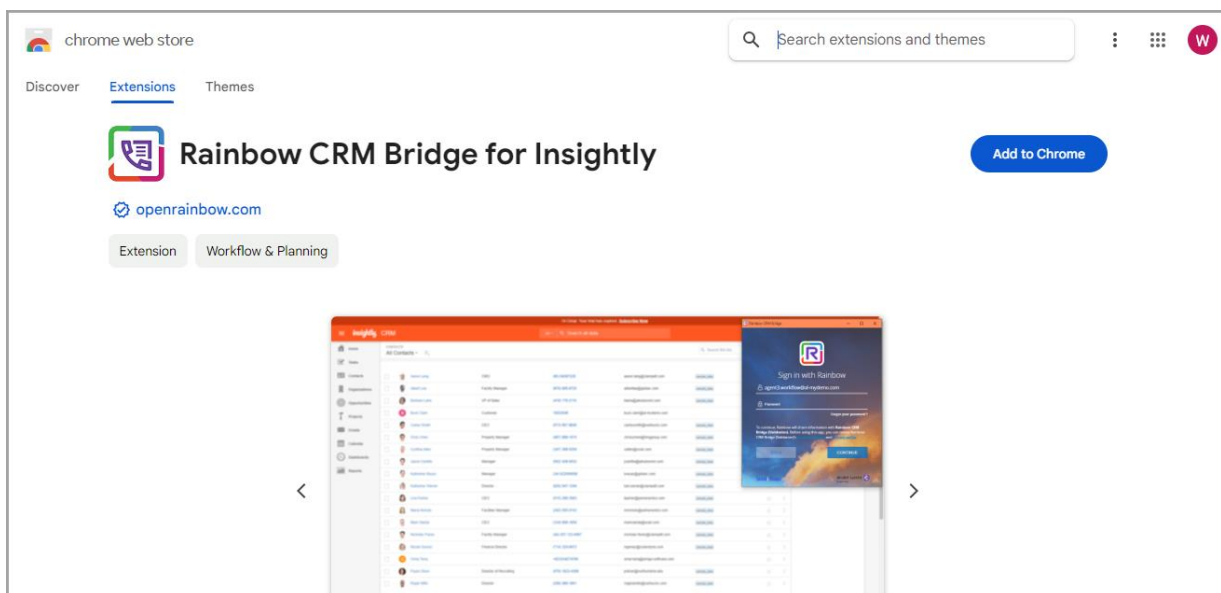
Note: Please perform the below-described process by using Google Chrome browser.

3.1 Installing Browser Extension

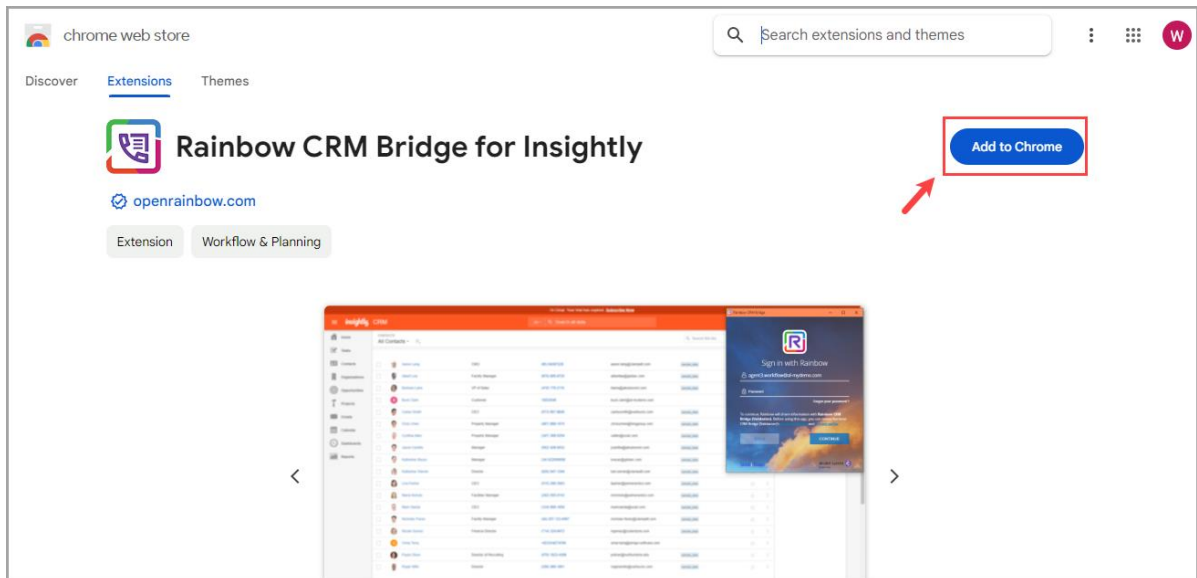
1. Use the below web address to access **Rainbow CRM Bridge for Insightly** extension in Chrome Web store:

<https://chromewebstore.google.com/detail/rainbow-crm-bridge-for-in/cdpkdjpdlbicgocllmjmaihmgjpiobml>

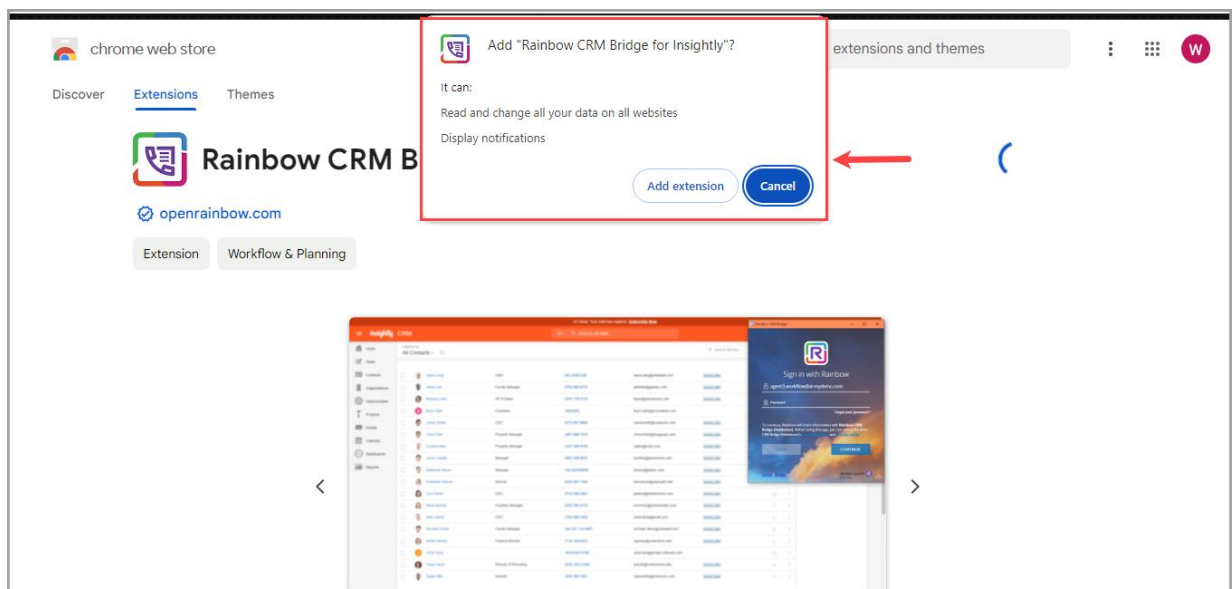
Following page is displayed:



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

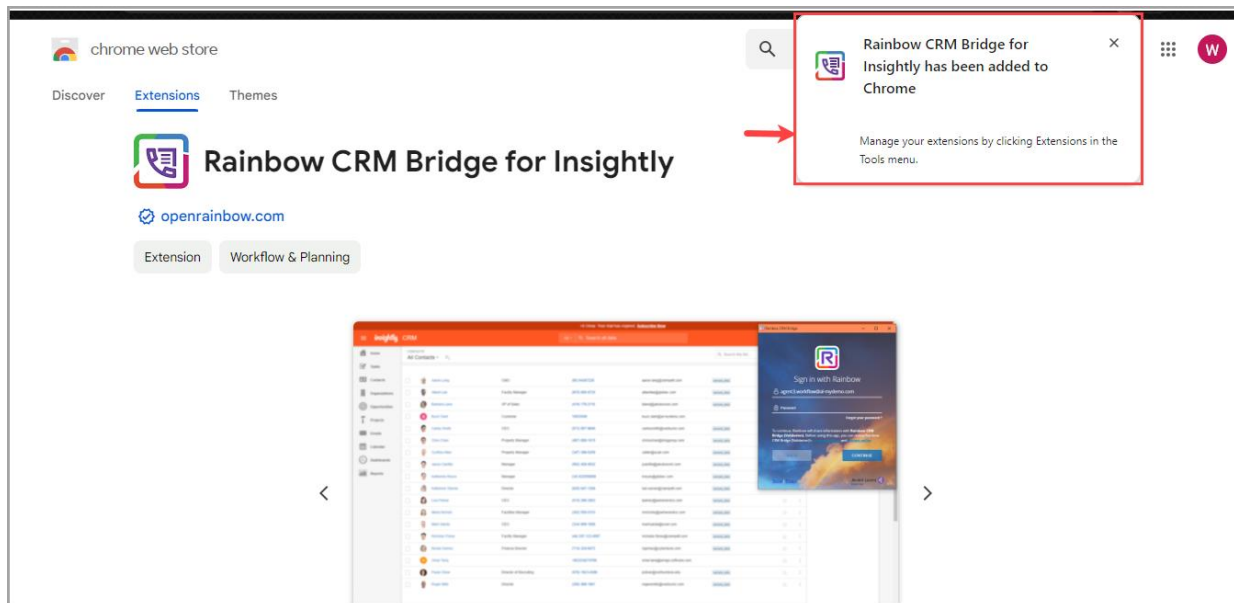


Following pop-up is displayed:




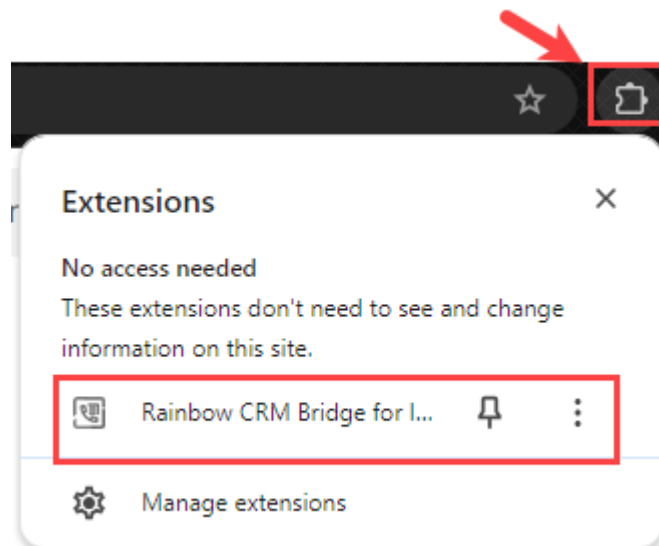
3. Click on **Add Extension** button to start the installation process.



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

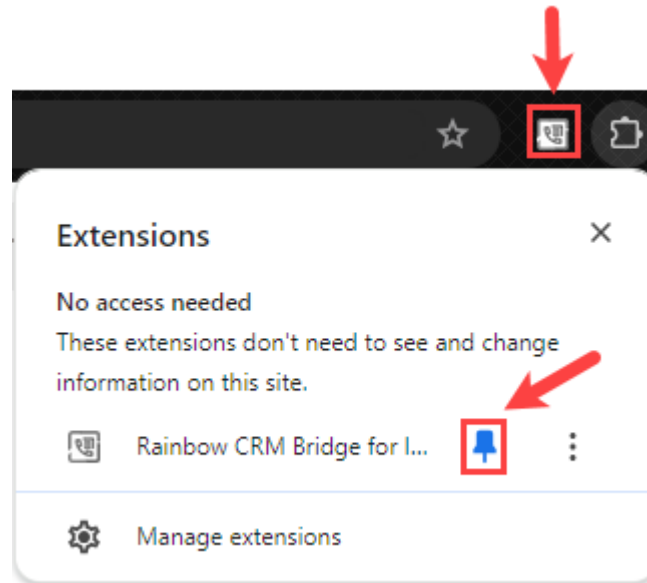


3.2 Configuring Browser Extension for the first time

1. Click on the  icon in the top right corner of Google Chrome. **Rainbow CRM Bridge for Insightly** extension is displayed in the drop-down menu as highlighted below:





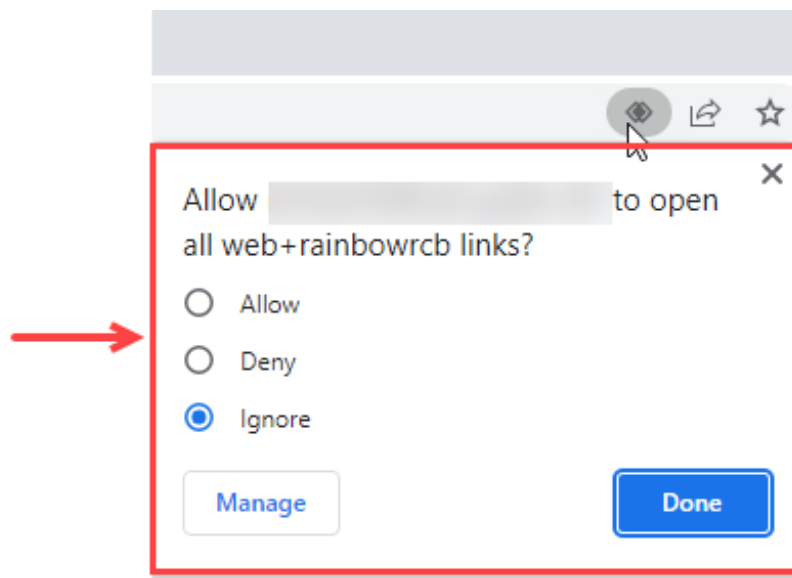
2. Click on the  icon displayed next to the extension. This action displays the extension next to the address bar in the form of  icon as highlighted below:



Note: Rainbow CRM Bridge for Insightly extension will function only when the agent is logged in to Insightly CRM.

3.3 Log in Insightly CRM

1. Please Log in to Insightly CRM.
2. An icon  shows up in the in the address bar of Google Chrome once you are successfully logged into Insightly CRM. When you click on the  icon, following drop down menu is displayed:




3. Select **Allow** option and then click on **Done** button as shown below:

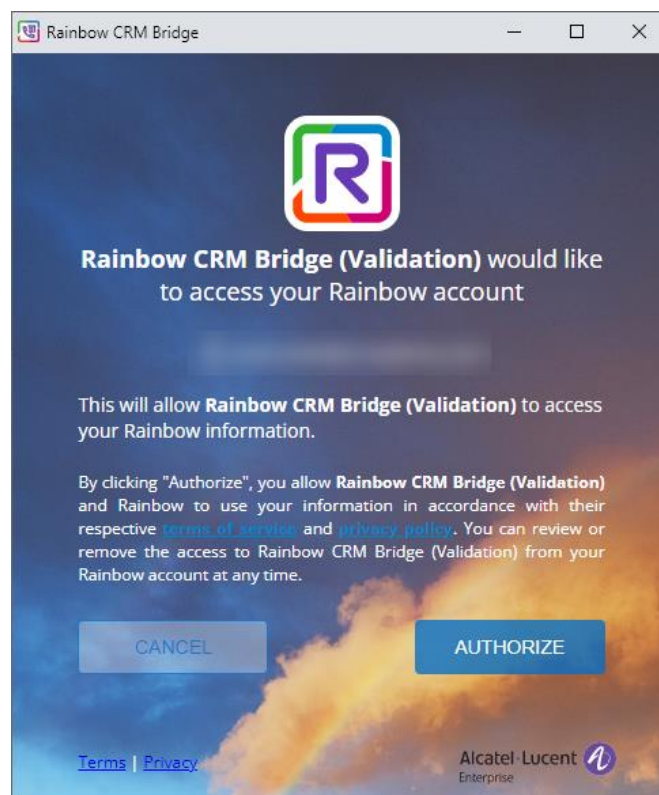


4. Press **Ctrl+F5** from your keyboard to refresh the browser.

3.4 Browser Extension – Starting up & SSO Configuration

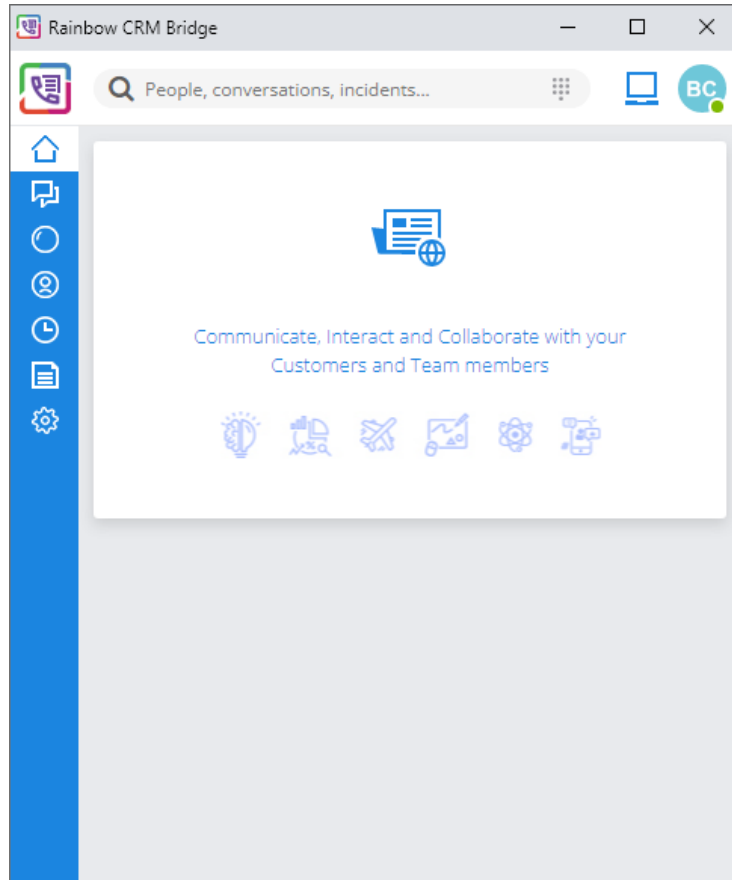
Startup **Rainbow CRM Bridge for Insightly** extension by clicking on the  icon available next to the address bar.

Following window is displayed when you open the extension for the first time:

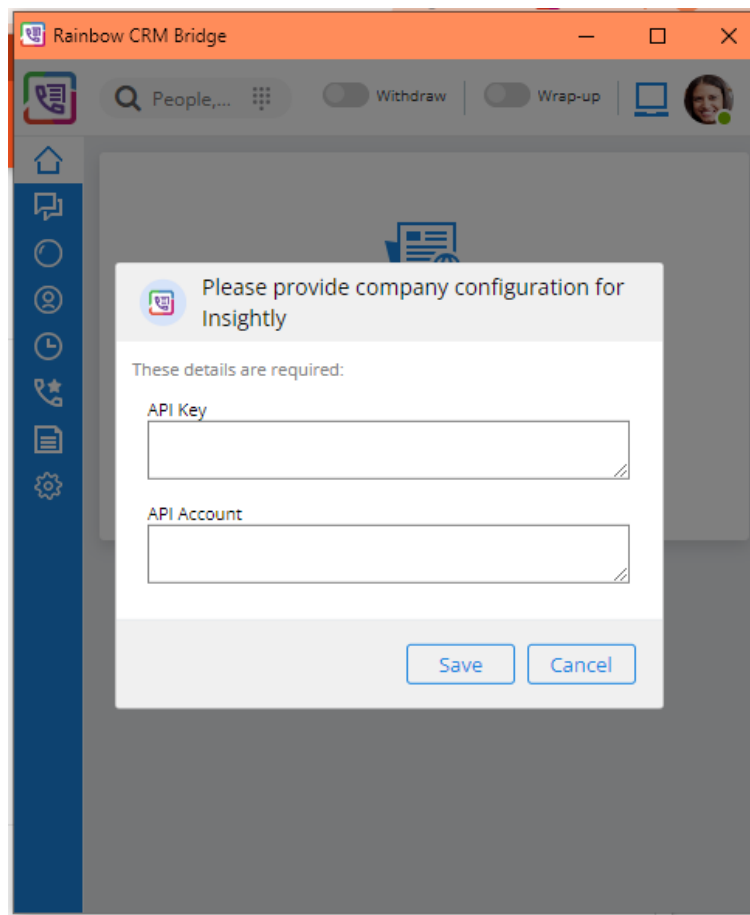


Click on the **Authorize** button and you will be logged into the **Rainbow CRM Bridge**.

Following screen is displayed in the chrome extension after successfully logging in:



If Insightly API has not been configured then following pop-up is displayed when you click on **Authorize** button:



Following information has to be provided:

- **API Key:** Please provide API key in this field. In order to extract this information, see [Insightly API Configuration](#) section.
- **API Account:** Please provide access account information in this field. In order to extract this information, see [Insightly API Configuration](#) section.

3.4.1 Insightly API Configuration

Note: The below-mentioned configuration steps are a one-time job.

In order to extract API key and API Account follow the steps described below:

1. Login to Insightly CRM and click on the user profile icon available in the top-right corner. On the drop-down menu, click on the **User Settings**. On User Settings page, scroll down to **API** section as shown below:

The screenshot displays the 'User Settings' page in the Insightly CRM interface. The page is divided into several sections: 'EMAIL ADDRESS LINKS IN INSIGHTLY', 'EMAIL MAILBOX SETTINGS', 'TASK AND CALENDAR SETTINGS', 'CONNECTED APPLICATION SETTINGS', and 'DEFAULT ADDRESS SETTING'. The 'CONNECTED APPLICATION SETTINGS' section is highlighted with a red box and labeled 'Step 2', showing the 'API' configuration fields: 'Your API key is:' (with a 'Generate new API key' link) and 'Your API URL is:'. A red arrow labeled 'Step 1' points to the 'User Settings' option in the user profile dropdown menu in the top right corner.

2. Copy **API Key** and **API URL** from the above screen and enter these values in respective fields of Rainbow CRM extension and click on **Save**.

Note: Remove **https://** from the URL address before entering it in the API URL field.

3. API Key and API URL address 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 Insightly 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 Insightly CRM, you must ensure that following configuration requirements related to telephone system are fulfilled. Integration with Insightly 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 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.

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.



- You are not logged into the Insightly CRM.



- You are logged in Insightly 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
Node Number (reserved) : 1
Instance (reserved) : 1
Timer No. : 384
Timer units : 0
```

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