

# Rainbow CRM Bridge



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## 1 Document History

| Edition | Date       | Changes / Comments / Details                                                                                                                                           |
|---------|------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 01      | 10/10/2023 | Initial Deployment Guide created                                                                                                                                       |
| 02      | 23/05/2024 | <b>Section 3.4</b><br>Title of the section has been updated.<br>Details about extracting authorization information have been added.                                    |
| 03      | 24/09/2026 | <b>Section 3.4.1</b><br>Title of the section has been updated.<br>Details have been updated about Hubspot Application Configuration.<br>Screenshots have been updated. |

## 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.

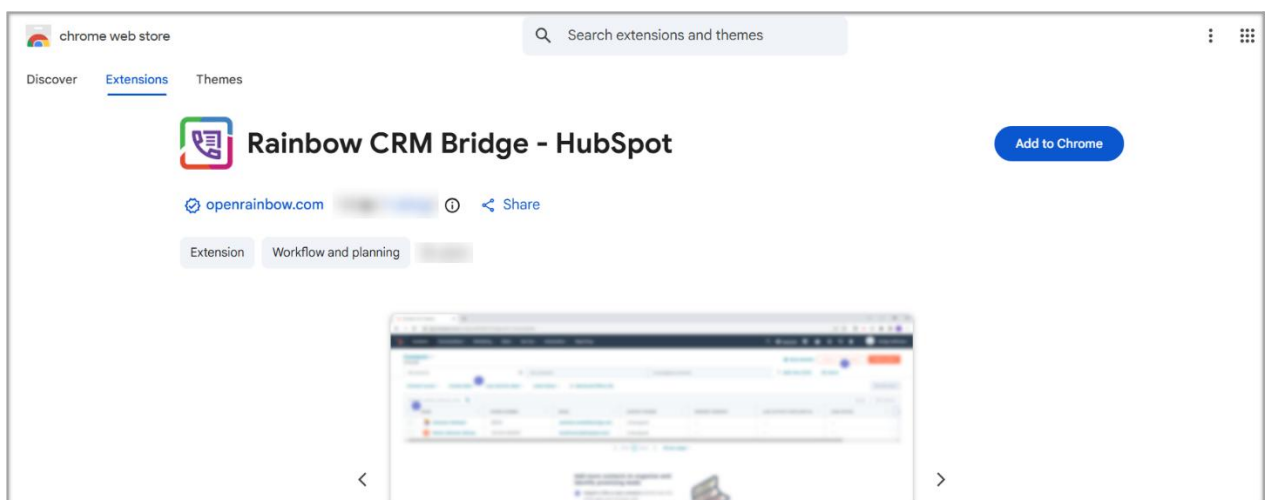
**Note:** Please perform the below-described process by using Google Chrome browser.

#### 3.1 Installing Browser Extension

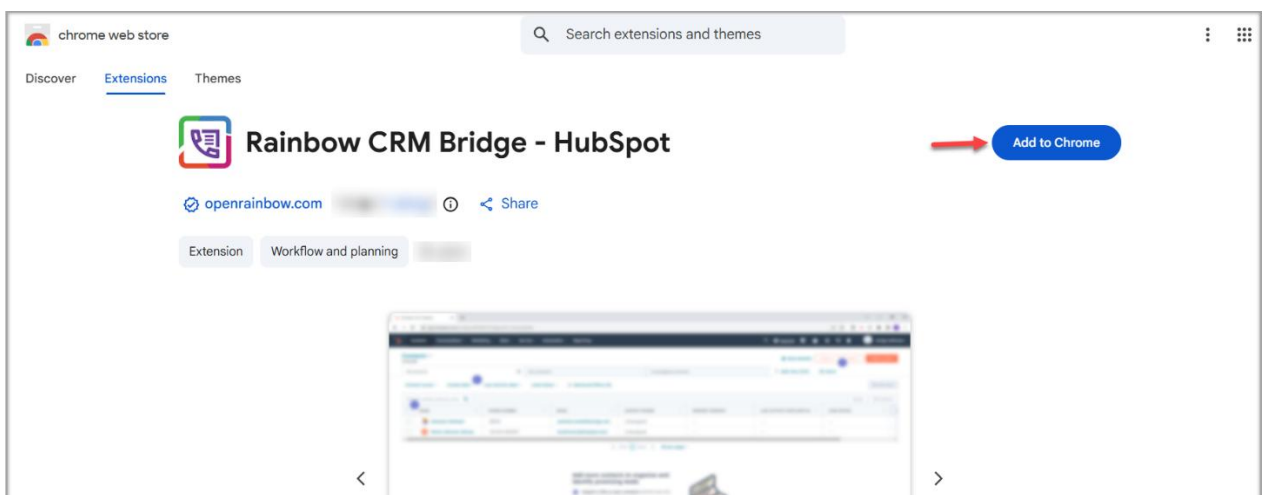
1. Use the below web address to access **Rainbow CRM Bridge - HubSpot** extension in Chrome Web store:

<https://chromewebstore.google.com/detail/rainbow-crm-bridge-hubspo/ikklpdfdbigobmifalmjoigiangdfpml>

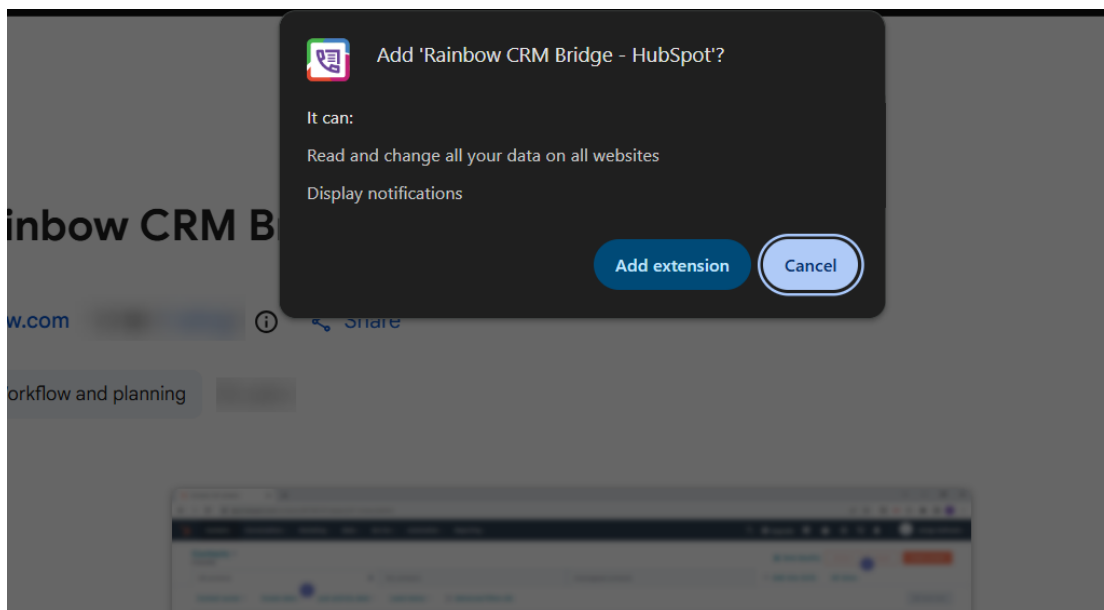
Following page is displayed:



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

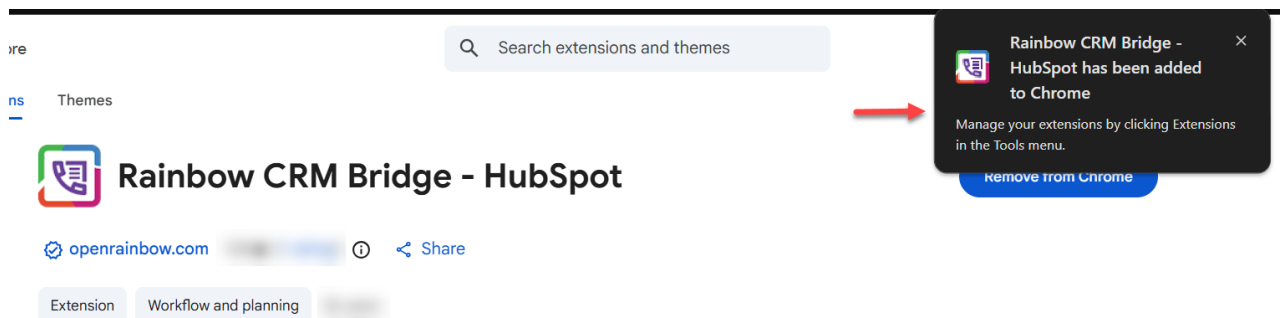


Following pop-up is displayed:



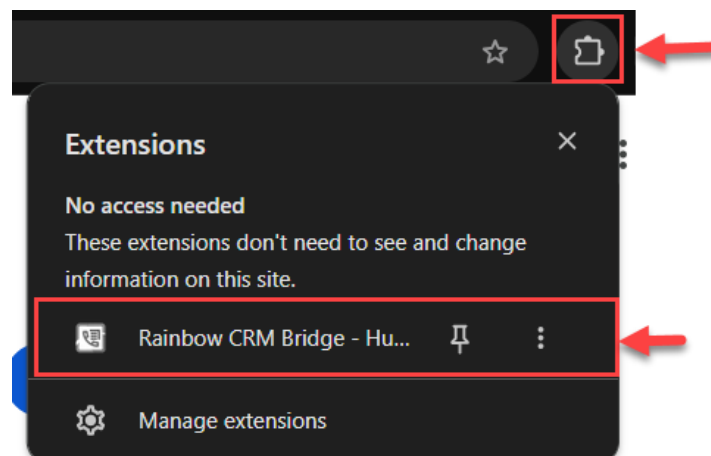
3. Click on **Add Extension** button to start the installation process.

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

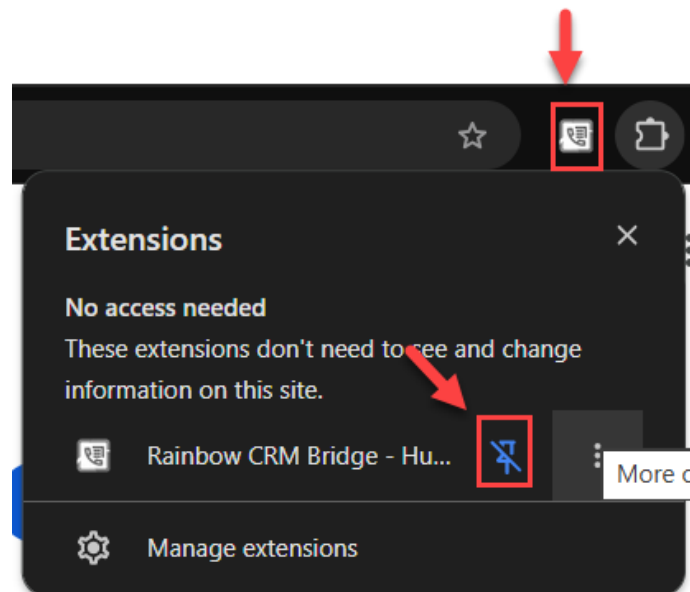


### 3.2 Configuring Browser Extension for the first time

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



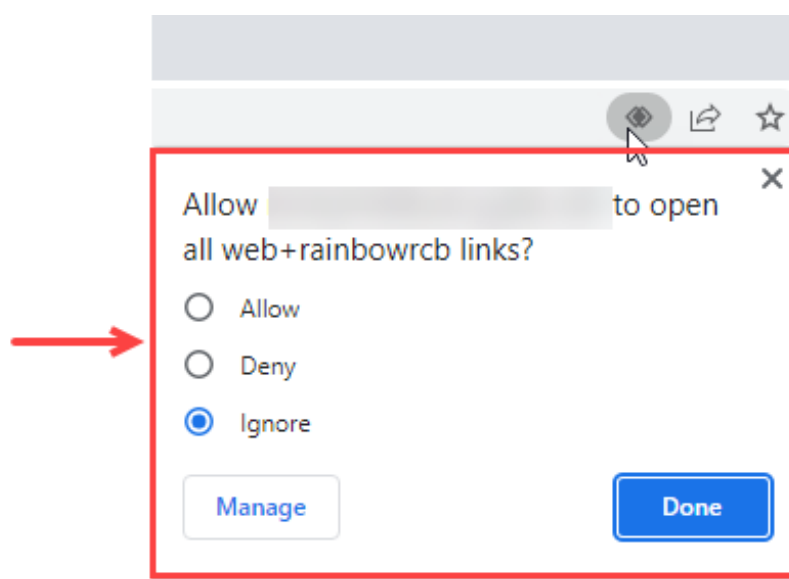
- Click on the  icon displayed next to the extension. This action displays the extension next to the address bar in the form of  icon as highlighted below:



**Note:** Rainbow CRM Bridge - HubSpot extension will function only when the agent is logged in to HubSpot CRM.

### 3.3 Log in HubSpot CRM

- Please Log in to HubSpot CRM.
- 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:



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

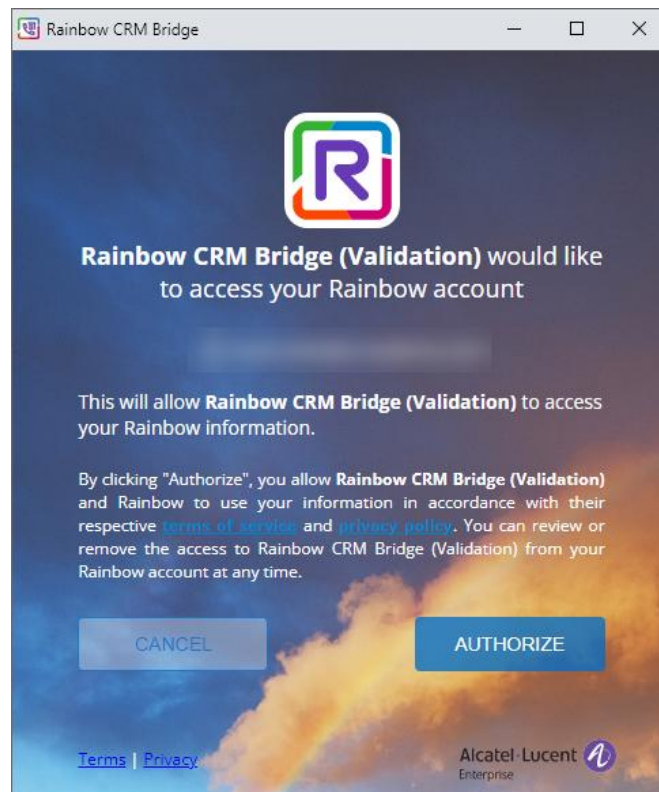


4. Press **Ctrl+F5** from your keyboard to refresh the browser.

### 3.4 Browser Extension – Starting up & SSO Configuration

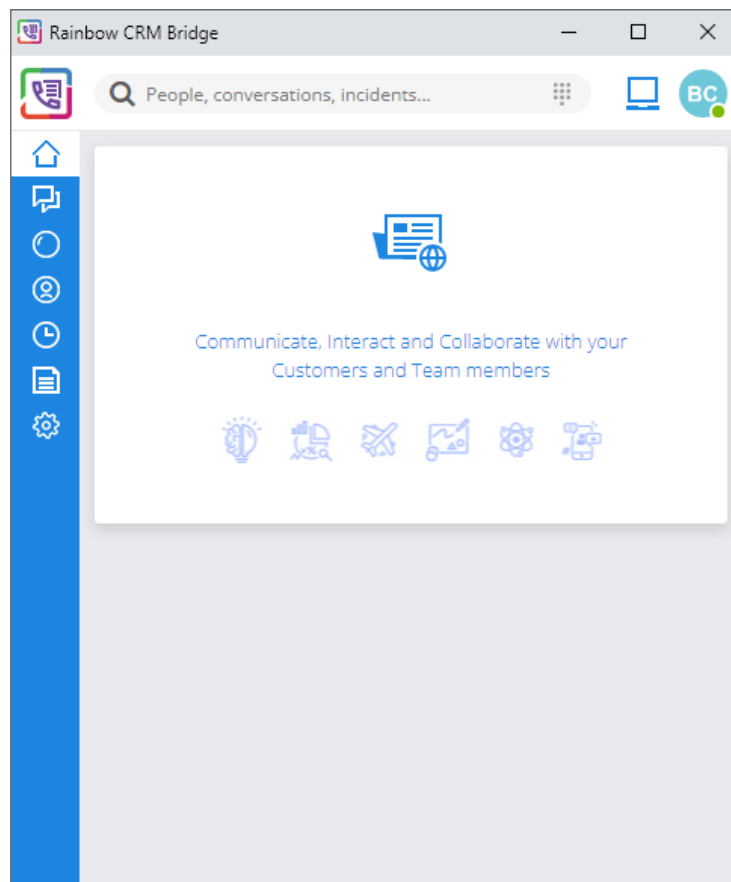
Startup **Rainbow CRM Bridge - HubSpot** extension by clicking on the  icon available next to the address bar.

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

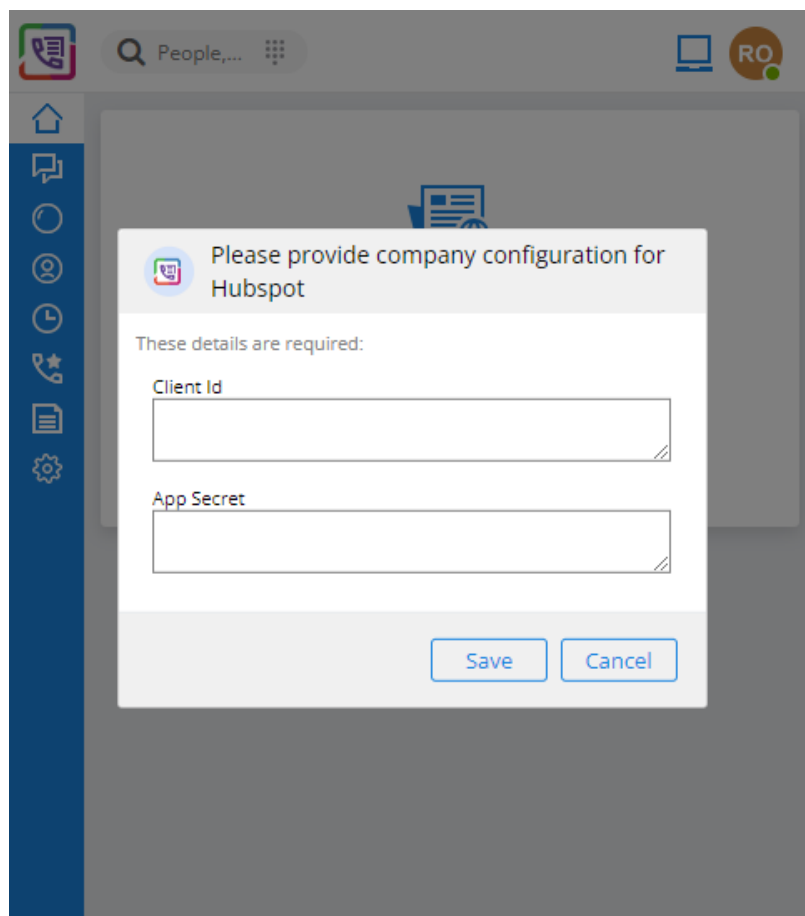


Click on the **Authorize** button and you will be logged into the **Rainbow CRM Bridge**.

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



If the HubSpot application has not yet been configured, the following window is displayed:



Following information has to be provided:

- **Client ID:** Please provide Client ID in this field. In order to extract this information, see [HubSpot Application Configuration](#) section.
- **App Secret:** Please provide Client Secret in this field. In order to extract this information, see [HubSpot Application Configuration](#) section.

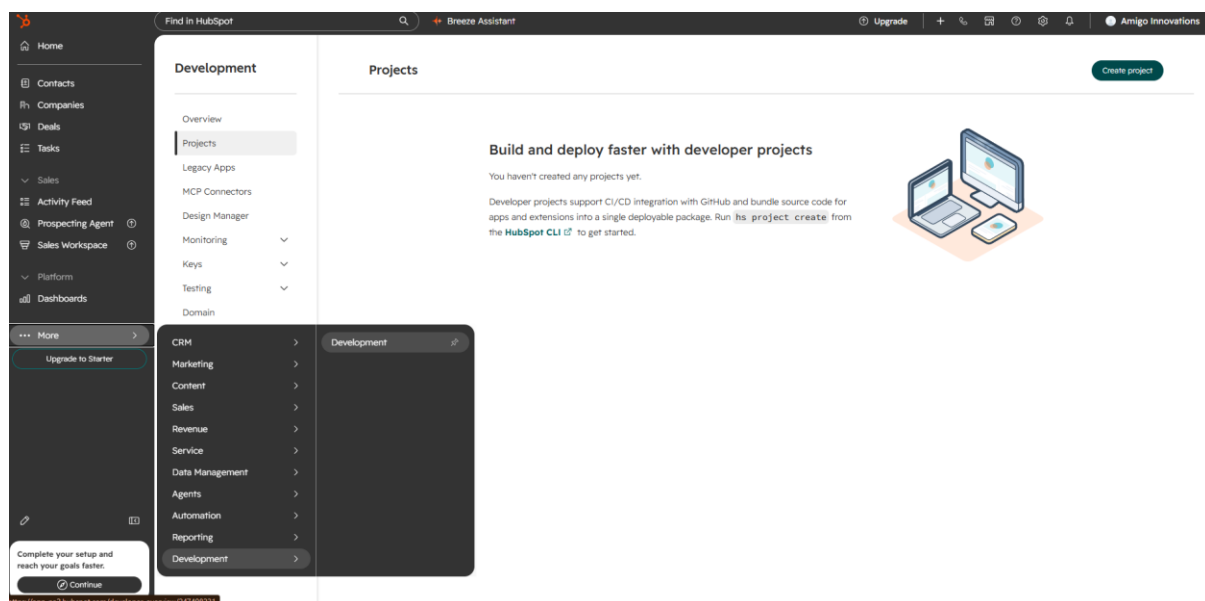
### 3.4.1 HubSpot Application Configuration

The Rainbow CRM Bridge – HubSpot extension uses a HubSpot application to establish authorized access to the HubSpot CRM environment. The Client ID and App Secret used by the extension are generated for this application.

HubSpot provides a CLI-based workflow for creating and managing development projects. The HubSpot application is created within the project, while the HubSpot CLI handles the creation and deployment of the project from the local system. The following procedure uses this workflow to create the project and configure the application required by the Rainbow CRM Bridge – HubSpot extension

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

1. Sign in to the HubSpot Developer Portal and open the Create a new project page.



2. Open Windows PowerShell and run the following command to install the HubSpot CLI:

```
npm i -g @hubspot/cli
```

```
Administrator: Windows PowerShell
Microsoft Windows [Version 10.0.26200.9457]
(c) Microsoft Corporation. All rights reserved.

C:\Users\Administrator>npm i -g @hubspot/cli
```

The CLI installation completes automatically. The following output is displayed after successful installation:

```
Administrator: Windows PowerShell
Microsoft Windows [Version 10.0.26200.9457]
(c) Microsoft Corporation. All rights reserved.

C:\Users\Administrator>npm i -g @hubspot/cli
npm warn deprecated glob@10.5.0: Old versions of glob are not supported, and contain widely publicized security vulnerabilities, which have been fixed in the current version. Please update. Support for old versions may be purchased (at exorbitant rates) by contacting i@izs.me
npm warn deprecated glob@10.5.0: Old versions of glob are not supported, and contain widely publicized security vulnerabilities, which have been fixed in the current version. Please update. Support for old versions may be purchased (at exorbitant rates) by contacting i@izs.me
npm warn deprecated glob@10.5.0: Old versions of glob are not supported, and contain widely publicized security vulnerabilities, which have been fixed in the current version. Please update. Support for old versions may be purchased (at exorbitant rates) by contacting i@izs.me
added 629 packages in 2m
130 packages are looking for funding
  run `npm fund` for details
```

- After the HubSpot CLI is installed, run the following command to authenticate the CLI with the HubSpot developer account:

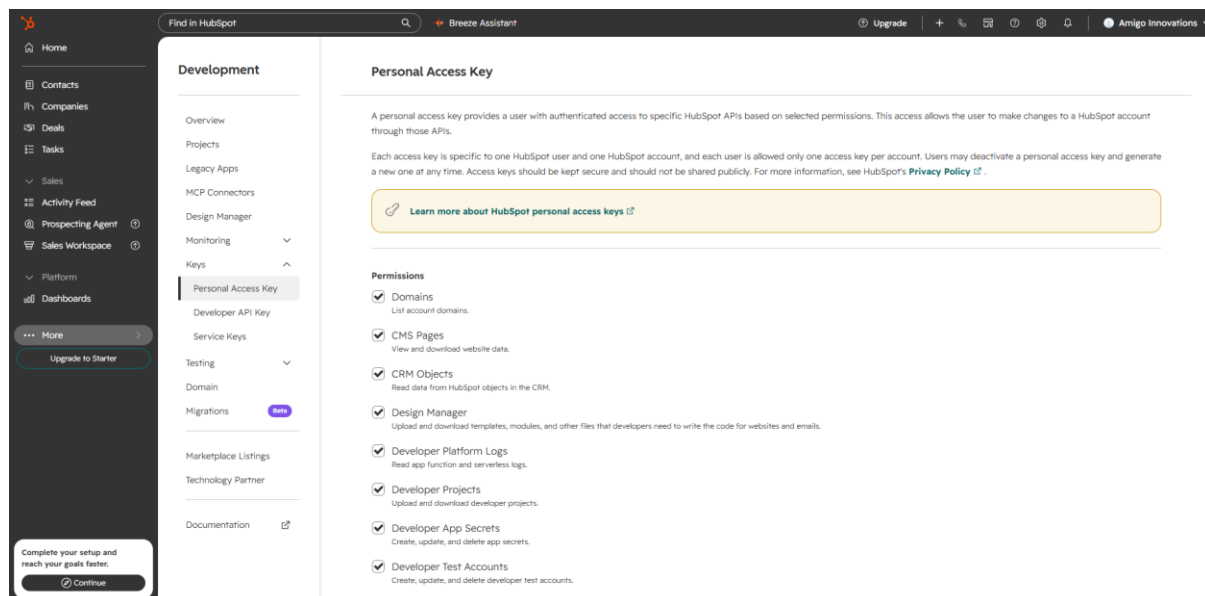
```
hs account auth
```

The command initiates the HubSpot account authorization process. A message is displayed indicating that it is waiting for HubSpot to send your personal access key.

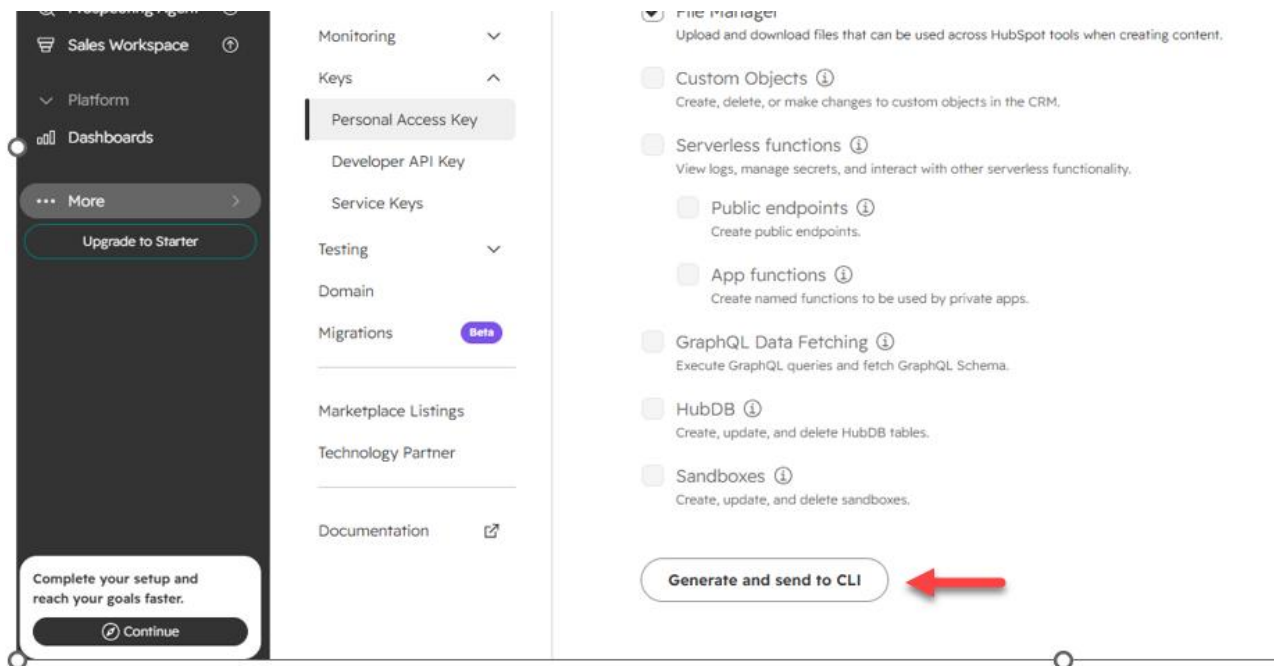
```
Administrator: Windows PowerShell
C:\Users\Administrator>hs account auth
Opening HubSpot: https://app.hubspot.com/1/personal-access-key?cliCallbackPort=63937&cliCallbackToken=64ad6723-5366-449b-8451-4490fdf757d3 in your web browser

- Waiting for HubSpot to send your personal access key... (press any key to enter it manually)
```

Personal Access Key page in HubSpot Developer Portal is displayed automatically as shown below:



- Scroll down to the displayed authorization page and click Generate and send to CLI.



The generated personal access key is sent to the HubSpot CLI, and a success message is displayed after the CLI is successfully authenticated.

```
C:\Users\Administrator>hs account auth
Opening HubSpot: https://app.hubspot.com/1/personal-access-key?cliCallbackPort=63937&cliCallbackToken=64ad6723-5366-449b-8451-4490fdf757d3 in your web browser
[SUCCESS] Personal access key received
```

5. Enter a unique name to reference this account in the CLI.

```
[SUCCESS] Personal access key received
✓ Enter a unique name to reference this account in the CLI: RainbowCRMBridgeProject
```

6. Create the HubSpot development project by running:

```
hs project create
```

The CLI prompts for the information required to configure the project. Provide the following values:

- **Project name:** Provide an appropriate name for the project.
- **Destination folder:** Specify the local folder in which the project is to be created.
- **Project-Base:** Select App.
- **Distribution:** Select Privately.
- **Authentication Type:** Select OAuth.
- **Feature:** Leave this field empty, as no additional features are required for the Rainbow CRM Bridge – HubSpot integration

Following success message is displayed after all the above configurations are provided.

```
Administrator: C:\WINDOWS\system32\cmd.exe
C:\Users\Administrator>hs project create
✓ [--name] Enter your project name: RCBProject
✓ [--dest] Choose where to create the project: C:\Users\Administrator\RCBProject
✓ [--project-base] Choose what to include in your project: App
✓ [--distribution] Choose how to distribute your app: Privately
✓ [--auth] Choose your authentication type: OAuth
✓ [--features] Choose which features to add:
No features were added to the project. Use the space bar to select features from the list.
[SUCCESS] Added feature(s) to app [RCBProject]

[SUCCESS]

RCBProject was successfully created in C:\Users\Administrator\RCBProject

RCBProject
├─ [app] RCBProject_app
│   └─ app
│       └─ app-hsmeta.json (added)

See our docs: https://developers.hubspot.com/docs/apps/developer-platform/build-apps/overview for more details about
building and testing these features.

Run 'hs project upload' when you're ready to deploy.
Run 'hs project dev' to start local development.
```

7. After the project is created, navigate to the project directory in Windows PowerShell:

```
cd rcbproject
```

Replace rcbproject with the project name specified during project creation, if a different name was used.

8. Upload the project to HubSpot by running:

```
hs project upload
```

```
C:\Users\Administrator\RCBProject>hs project upload
Initializing project upload to account RainbowCRMBridgeProject [standard] (247498231)

✓ [--forceCreate] The project RCBProject does not exist in RainbowCRMBridgeProject [standard] (247498231). Would you
like to create it? Yes
[SUCCESS] New project RCBProject successfully created in RainbowCRMBridgeProject [standard] (247498231).
[SUCCESS] Uploaded RCBProject project files to RainbowCRMBridgeProject [standard] (247498231)

View build #1 in HubSpot: https://app.hubspot.com/developer-projects/247498231/project/RCBProject/activity/build/1

[SUCCESS] Built RCBProject #1
[SUCCESS] Building RCBProject_app ... DONE

-----
Build #1 succeeded. Automatically deploying to RainbowCRMBridgeProject [standard] (247498231)

View deploy of build #1 in HubSpot: https://app.hubspot.com/developer-projects/247498231/project/RCBProject/activity/deploy/1

[SUCCESS] Deployed build #1 in RCBProject
[SUCCESS] Deploying RCBProject_app ... DONE

Project uploaded to RainbowCRMBridgeProject [standard] (247498231)
```

This uploads the locally created project to the HubSpot Developer Portal.

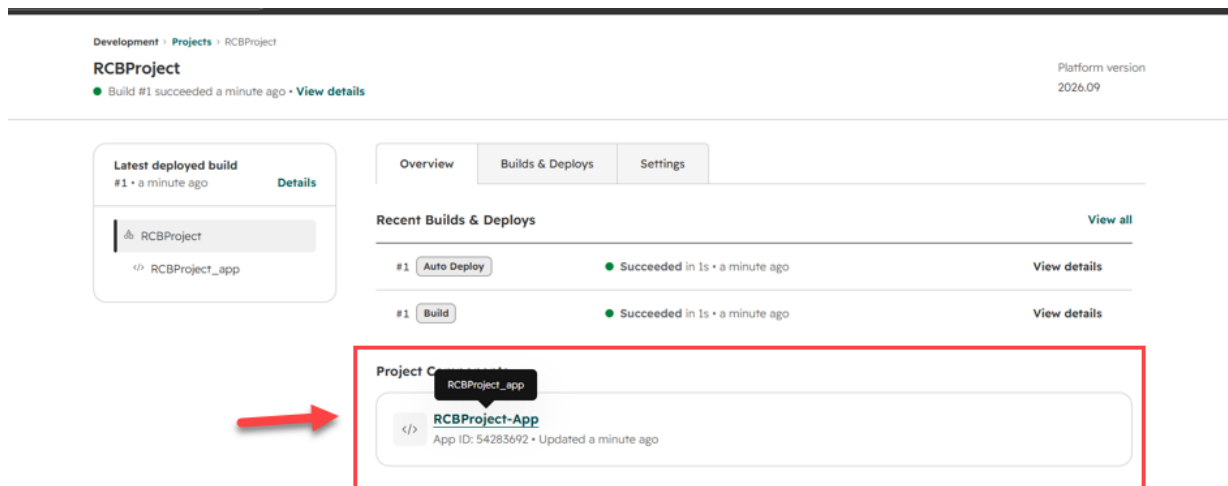
9. After the project is uploaded, open the project in the HubSpot Developer Portal by running:

```
hs project open
```

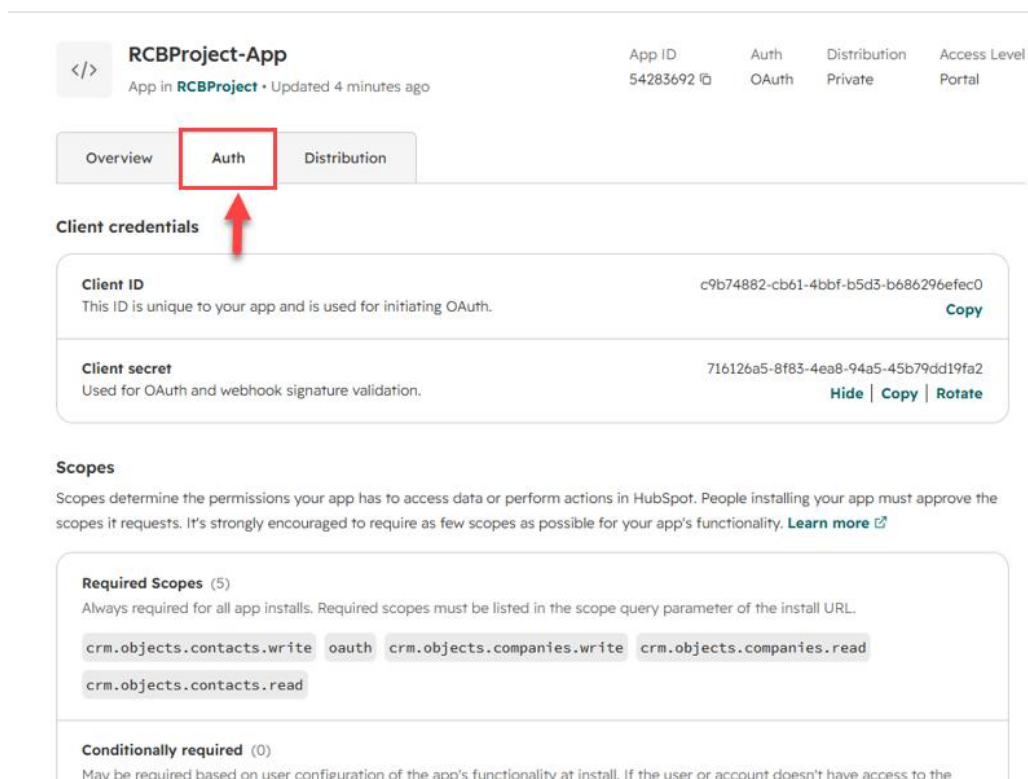
```
C:\Users\Administrator\RCBProject>hs project open
[SUCCESS] Successfully opened "RCBProject"
```

The project opens in the HubSpot Developer Portal, where the application can be configured.

10. In the HubSpot Developer Portal, locate the Components section of the project and click Project App to open the application configuration.



11. In the Project App configuration, Click on Auth tab



12. Locate the Redirect URL field and enter the following URL:

<https://hubspot.openrainbow.io>

**Redirect URLs (2)**

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 this list, users will get an install error. [Learn more about redirect URLs](#)

`https://hubspot.openrainbow.io`

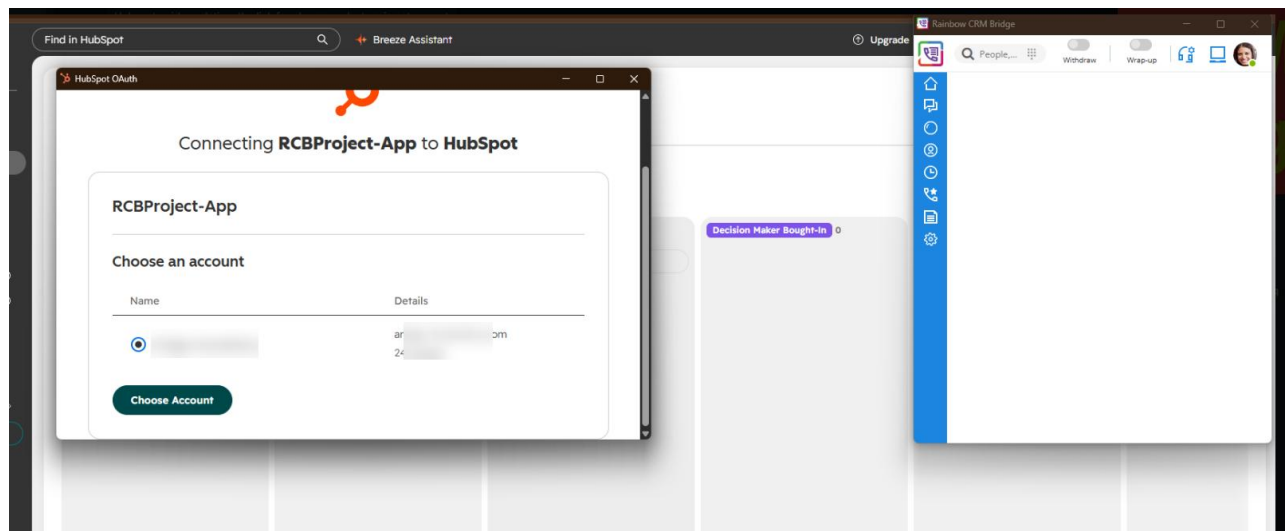
The redirect URL specifies the destination to which HubSpot redirects the browser after the OAuth authorization process is completed.

13. 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. Copy

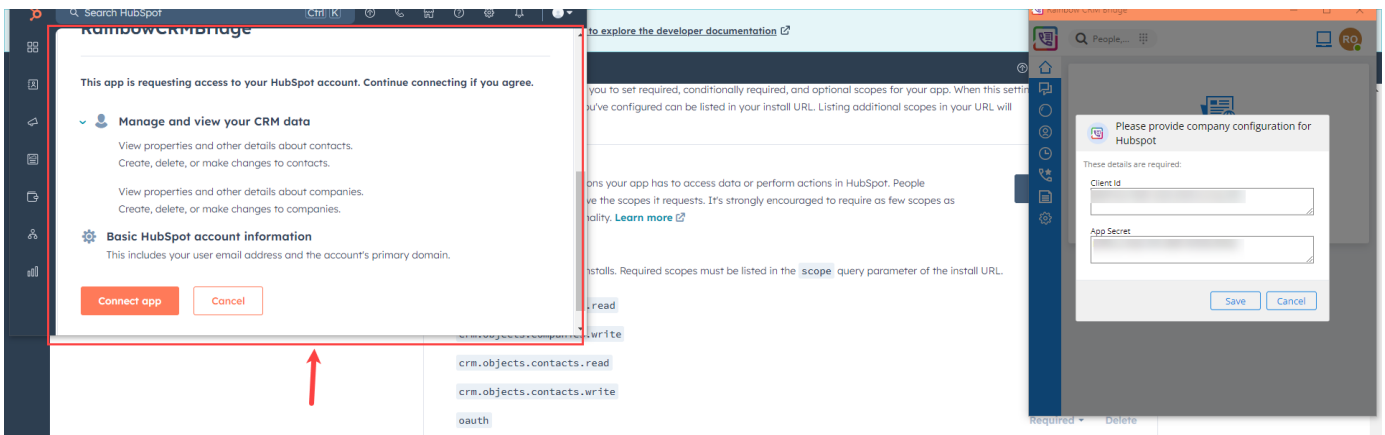
**Client secret**  
Used to establish and refresh OAuth authentication. Show Copy

14. 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:



15. 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

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16. 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 Versions                       |
|---------------------------------------------------|------------------------------------------|
| <b>OmniPCX Enterprise (OXE)</b>                   | v12 or higher                            |
| <b>OmniPCX Office (OXO) Connect</b>               | R3.x or higher                           |
| <b>CISCO Unified Communication Manager (CUCM)</b> | v9.x, 10.x, 11.x, 12.x                   |
| <b>Mitel MiVoice</b>                              | MiVoice 250                              |
| <b>NEC</b>                                        | iS3000, iS4000                           |
| <b>Asterisk</b>                                   | v11.21.1,v11.21.2,v11.21.3, v16.x, v17.x |
| <b>OpenScape</b>                                  | 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.



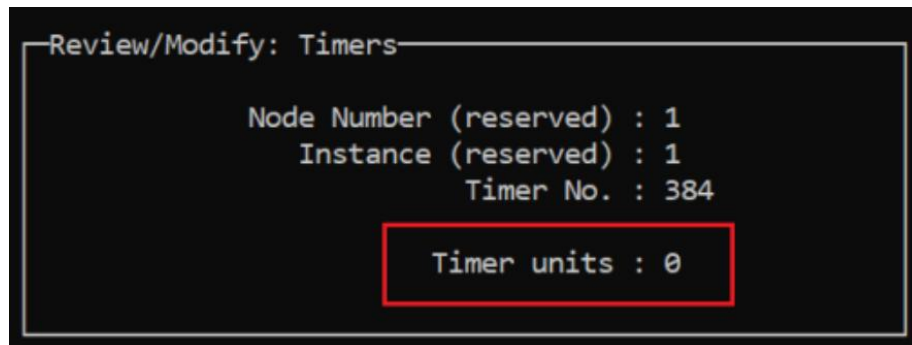
- You are not logged into the HubSpot CRM.



- 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
Node Number (reserved) : 1
Instance (reserved) : 1
Timer No. : 384
Timer units : 0
```

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