

Zoom Phone PCI Pal Configuration Guide



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1 Introduction

1.1 Zoom

Zoom is the leader in modern enterprise video communications, with an easy, reliable cloud platform for video and audio conferencing, collaboration, chat, and webinars across mobile devices, desktops, telephones, and room systems. Founded in 2011, Zoom helps businesses and organizations bring their teams together in a frictionless environment to get more done. Zoom is headquartered in San Jose, California.

This solution is in partnership with PCI Pal, enabling companies to take payments from their customers over the phone.

This document will take you through how to Install, Configure and Uninstall the PCI Pal App as a Zoom Admin.



2 Zoom Phone – Installing PCI Pal

2.1 How to Install PCI Pal

To begin the installation process, you can click the link to the Zoom Marketplace

Alternatively, you can search for PCI Pal in the Zoom App Marketplace via the search bar in the top right corner



A Zoom Admin will need to be logged into the Zoom account on the web browser to install the PCI Pal App.



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You may need to accept the Marketplace Terms of Use with Zoom



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		Allow	Decline	



Check the 'Allow this app to use my shared access permissions'. Click on 'Allow' for shared permissions.



You will then be asked to open up your Zoom Desktop software.

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zoom	Open Zoom Meetings? Support English +
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	Always allow api.zoom.us to open links of this type in the associated app
	Open Zoom Meetings Cancel
	Click Open Zoom Meetings on the dialog shown by your browser
	If you don't see a dialog, click Launch Zoom below
	By launching Zoom, you agree to our Terms of Service and Privacy Statement
	Launch Zoom
	Don't have Zoom Client installed? Download Now
	©2024 Zoom Video Communications, Inc. All rights reserved.
	Privacy & Legal Policies

You have the option to 'Always allow api.zoom.us to open links of this type in the associated app' (the software). Click 'Open Zoom Meetings'.



This will then open the PCI Pal App in your desktop software.



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Providing you are an Admin to your Company's Zoom solution, you will be able to auto install the app on your colleague's accounts.

From the Marketplace, click 'Add for Others'





You will then be able to choose which selection of Agents you wish to share the app with.

App can access and manage this information even the app. As an admin, add PCI Pal Secure Payme	in when not using ents for
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Choose 'All Users' or 'Users & Groups'

- All users: Add this app for all users on your account.
- Users & Groups: Search for and select one or more users or user groups on your account to add this app for.





(Optional) Deselect the Send email notifications to the users I've added checkbox to prevent Zoom from sending an email notification to the users you are adding the app for. By default, this option is selected.

Click **Allow** to authorize the app for the selected user(s) and/or user group(s). Once added, users will see a notification in the desktop client and potentially receive an email notification from Zoom.

They will receive an email letting them know of the installation

PCI Pal Secure Payments is ready to use! Your account admin has added this app for you. PCI Pal Secure Payments By PCI Pal Elevate your Zoom experience with PCI Pal: Frictionless telephone & digital payments.
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For further information view: Zoom Support - How to add Marketplace Apps as an admin



2.2 How to configure PCI Pal

After the purchase of PCI Pal, you will go through an Onboarding project with PCI Pal directly.

The onboarding project will set up your payment journeys and have them connected to your company financial accounts in order to take payments from your customers.

Once your onboarding project is complete, you will be provided with a separate document containing the confidential credentials to link Zoom to PCI Pal.

These details will be entered into the Configuration page.

- In order for the App to be configured, you will need to be an Admin on your Company's Zoom solution
- The Zoom Administrator will install the App, this will then install for the agents (from the instructions above).

If you have not already purchased PCI Pal, please Contact Sales

	Configuration
	Use Intelligent Checkout framework?
	Tenant Id* 774
	Tenant Name* Zoom
	Client Secret
	Default Region* ca-central-1
	Flow Id* 3215
	SUBMIT
	Protected by
We ha	ve partnered with PCI Pal to deliver a safe, secure and fully compliant payment experience. PCI Pal <u>Privacy Statement</u> and <u>Cookie Statement</u> . that empower companies to take payments securely, adhere to strict industry governance, and remove their business from the significant risks posed by

Please note: For security purposes, after you first enter in the 'Client Secret' you can not review what was entered, however you can overwrite with a new secret.*

Once installed and configured, when next logged into the Zoom Phone Client on the desktop, the PCI Pal App will be in the Apps Panel on the right hand side.



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To understand how the PCI Pal App works and the payment journeys possible, please review the relevant user guides on our Marketplace.



3 Uninstalling the PCI Pal App.

Log into Zoom App Marketplace on a Web Browser.

Alternatively, log into your Zoom Desktop software. Click on your Initials in the top right corner. Choose Settings.

?	
JR Jenny Reveley jen***@pcipal.com	>
Available	>
Set Status Message	
Work Location	Off >
Forward Calls	
Try Top Features	C
Check for Updates	
Discover What's New	
Help	>
Settings	
Add Account	NEW
Sign Out	

Click on 'Zoom Apps' from the left hand menu.

Click on the 'Manage Apps' link at the bottom of the list.

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	Audio	No-Auth-App)
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C	Phone	Zoom - Dev)
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8	Profile	Zoom Apps Local App Data & Cookies	
	Statistics	Clear all local app data & cookies from this device ⑦ Clear	
	Keyboard Shortcuts		
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This will open up your default browser and take you to the Marketplace.



You may need to log into your Zoom account at this point. This is the same login you use for the Desktop software



Once logged in, ensure you are on the 'Added Apps' page.

Click the 'Remove' button.

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You have the **option** to send feedback as to your reason for removal. Should they be applicable, the options are:

- Quality Issues
- Abuse, fraud or spam

Else, click 'Remove'.





This will have removed the app from your account

Created Apps Added Apps App Requests Apps in Production App Info Added by Shared Access Permissions Your added apps will appear here	ZOOM App Marketplace			Q Se	arch a published app	Develop ~	Manage	JR
	Created Apps Added Apps App Requests	Added Apps Q Search by app name Apps in Production Name	ent App Info Your added	Added by d apps will appear her	Shared Access Per	missions		

All configuration details will have been removed.

PCI Pal will disable the Payment Journeys.



4 Errors you may encounter

Unable to access App on Marketplace

You may encounter this if you are trying to add the app to an unauthorized account on Marketplace. For example, trying to access Marketplace Go (Staging) from a production account.

Alternatively, the link to the App was incorrect.

ZOOM App Marketplace	Q Search a published app	Develop ~	Manage	JR
Application not found It may have been deleted or you don't have permission to view it right now.				

Unable to Review Admin Credentials

You may encounter this error if you are trying to access the Configuration Panel, and do not have the correct permissions. In order to access this page, you will need to be an Admin on your Company's Zoom solution.





[End of Document]