Zoom Virtual Agents
PCI Pal Installation Guide

01. Public

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1 Introduction

1.1 Zoom

Zoom is a leader in modern enterprise video communications, providing 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 organisations bring their teams together in a frictionless environment to get more done. Zoom is headquartered in San Jose, California.

Zoom also provides a comprehensive contact centre and phone solution, enabling organisations to manage customer interactions across voice, video and digital channels. Zoom Phone delivers cloud-based telephony for internal and external calls, while Zoom Contact Center provides an omnichannel platform for routing and resolving customer enquiries. This includes AI-powered Zoom Virtual Agent solution, which can autonomously handle customer conversations and resolve enquiries across chat and voice channels.

This solution, enables companies to take payments from their customers via a digital link created by a Zoom Virtual Agent.

This document will take you through how to install the PCI Pal Zoom Virtual Agent (ZVA) tool.

2 Zoom Virtual Agents

2.1 Description of solution/documentation scope

PCI Pal have created a Zoom marketplace tool that enables the creation of digital payment links within the Zoom Virtual Agent product. The solution does not currently support DTMF or speech-based payments.

The tool is invoked at the point a payment is required and must be sent the relevant details, including the customer, order reference and amount. The collection and verification of this data is out of scope of the PCI Pal tool.

In response to receiving the payment link request, the PCI Pal tool generates and returns a customer-facing URL. When a customer visits the URL, they are presented with a payment collection page that securely captures their payment card information. The delivery of the URL to the customer (which could be as simple as displaying it in the chat window) is out of scope of the PCI Pal tool.

The design of the PCI Pal payment page, and any post-payment actions that take place outside of the Zoom Virtual Agent environment (such as payment update webhooks), is out of scope of this document.

This document covers the PCI Pal-specific configuration of the marketplace tool. It is not intended as an end-to-end implementation guide, for the following reasons:

- **Customer journeys are bespoke.** Each Zoom Virtual Agent deployment is unique to the customer's business processes, conversational design and routing logic. The point at which a payment is requested, and the steps that precede and follow it, will differ in every implementation. Documenting a single "correct" journey would therefore be misleading.

- **Upstream data handling is out of scope.** The capture and verification of the customer, order reference and amount happens within the customer's own systems and Virtual Agent flow, before the PCI Pal tool is invoked. PCI Pal has no visibility or control over this and cannot prescribe how it should be built.

- **Downstream actions are out of scope.** What happens after payment (such as webhooks) sits outside the Zoom Virtual Agent environment and varies by customer, this will be designed and implemented by the PCI Pal professional service team.

- **Zoom platform expertise is required.** Building these elements into a live virtual agent journey requires a trained and competent Zoom administrator. This document assumes that expertise rather than attempting to reproduce Zoom's own platform documentation.

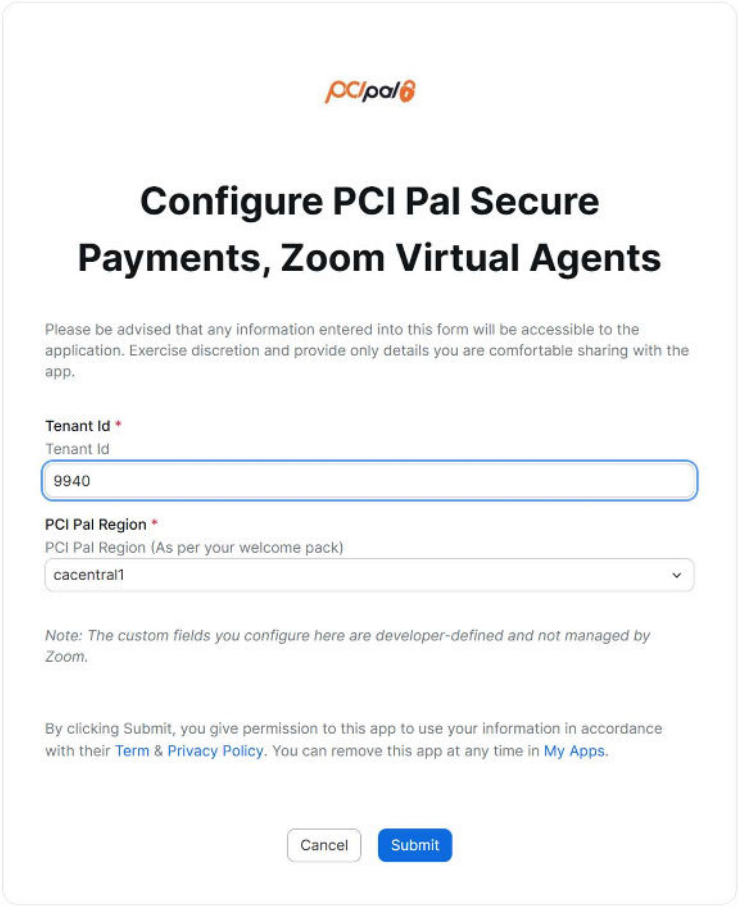
For these reasons, this document focuses on the PCI Pal-specific configuration and integration points, and assumes a suitably skilled Zoom administrator will incorporate them into the wider, customer-specific virtual agent journey.

3 Zoom Phone – Installing PCI Pal

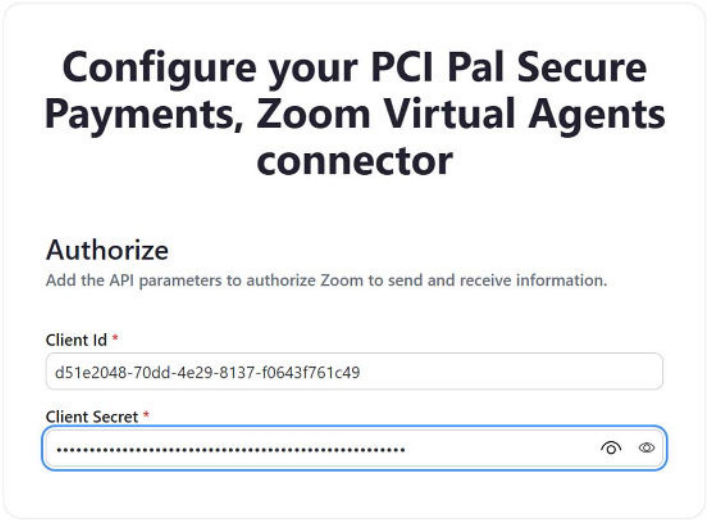
3.1 How to Install PCI Pal

Visit https://marketplace.zoom.us and search for PCI Pal, review the marketplace listing, requirements and terms and click ‘Add’.

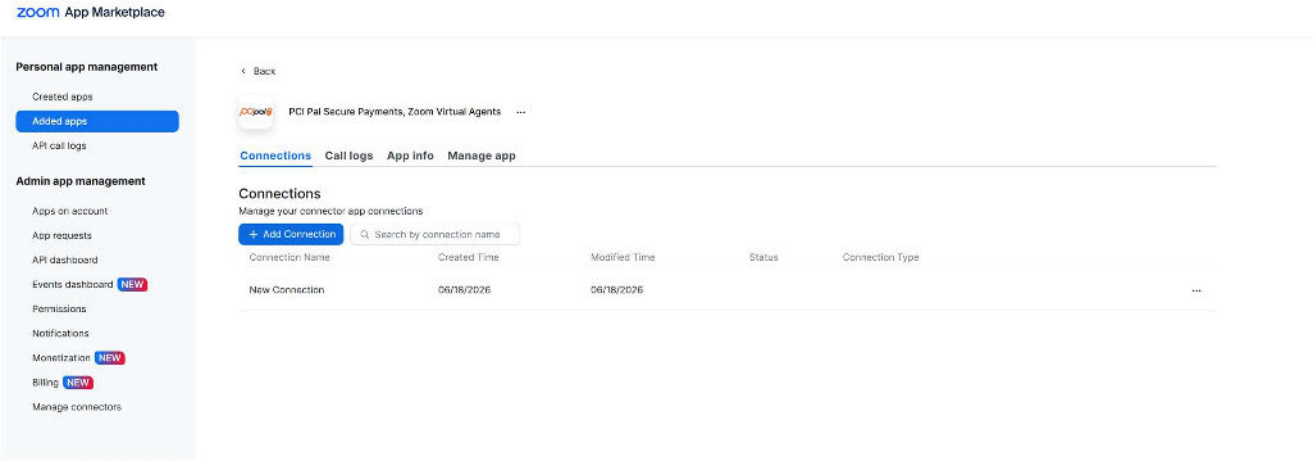
Use the information from your welcome pack to enter you Tenant Id and desired PCI Pal region.



Enter your client id and client secret, these will be securely shared by your project implementation team.



PCI Pal will be shown as an added application on your account, you can add additional connections to support other PCI Pal payment regions (if specified by the PCI Pal project team)



3.2 Verify installation on account

You can verify the PCI Pal payment tool is available by syncing and reviewing the marketplace tool templates available to you

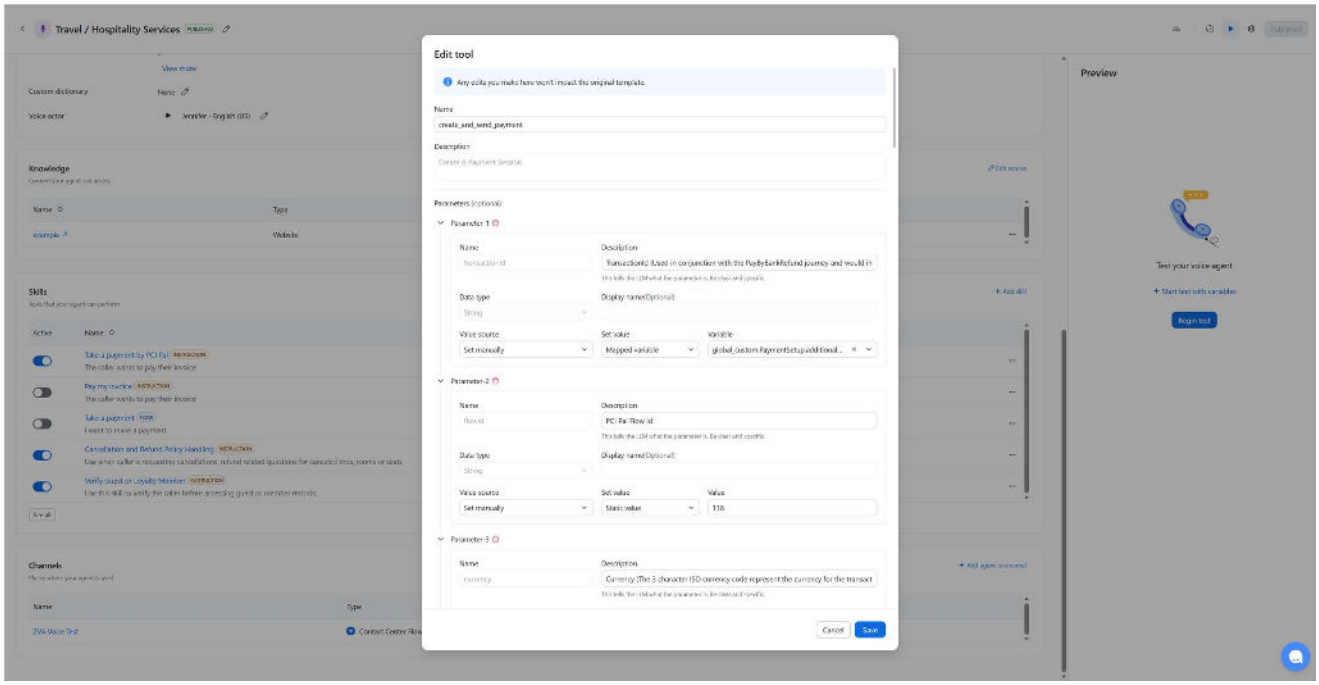
Create a voice or chat agent and use the desired PCI Pal payment tool accordingly.

3.3 Setting the payment flow id

When configuring the tool in a virtual agent, enter the static Flow ID supplied by the PCI Pal project team.

All other values are required and will be derived from the fields mapped as part of standard Virtual agent design. The Zoom reference for managing these fields can be found here: Managing global custom and system variables for Zoom Virtual Agent.

The specific fields required are detailed later in this document.



3.4 PCI Pal Data fields

i. Input Fields

Field Name	Purpose
flowId	The identification number of the customer payment journey. Some customers will have multiple flow to cater for multiple departments
amountInMinor	Payment Amount
Reference	Reference number used to correlate with customer billing system.
firstName	Cardholder firstname
lastName	Cardholder Surname
addressLine1	Cardholder address line 1
addressLine2	Cardholder address line 2
townOrCity	Cardholder Town / City
stateOrCounty	Cardholder State / County
postcode	Cardholder Postcode
country	Cardholder Country
additionalField1	As defined by PCI Pal project team
additionalField2	As defined by PCI Pal project team
additionalField3	As defined by PCI Pal project team

ii. Output Fields

Field Name	Purpose
Id	Session identifier – use when discussing issues with PCI Pal support
LinkId	Not currently used
DigitalSessionLink	Customer facing URL