



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.

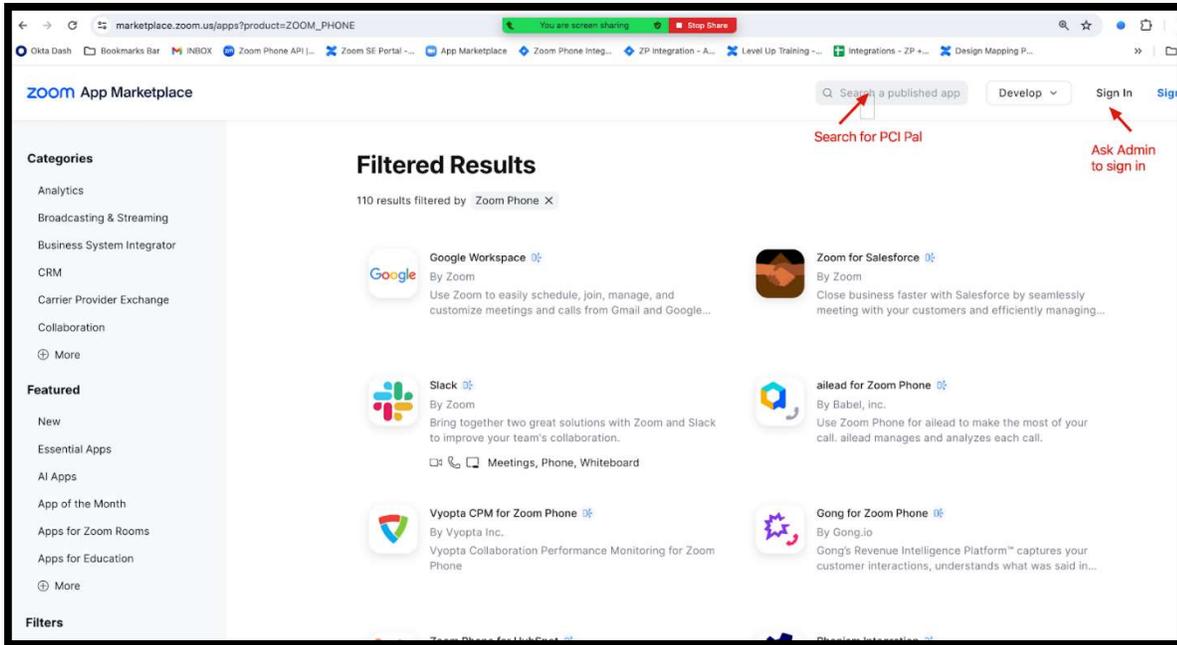
This document will take you through how to Install, Configure and Uninstall the PCI Pal App as a Zoom Admin.

2 Zoom Phone – Installing PCI Pal

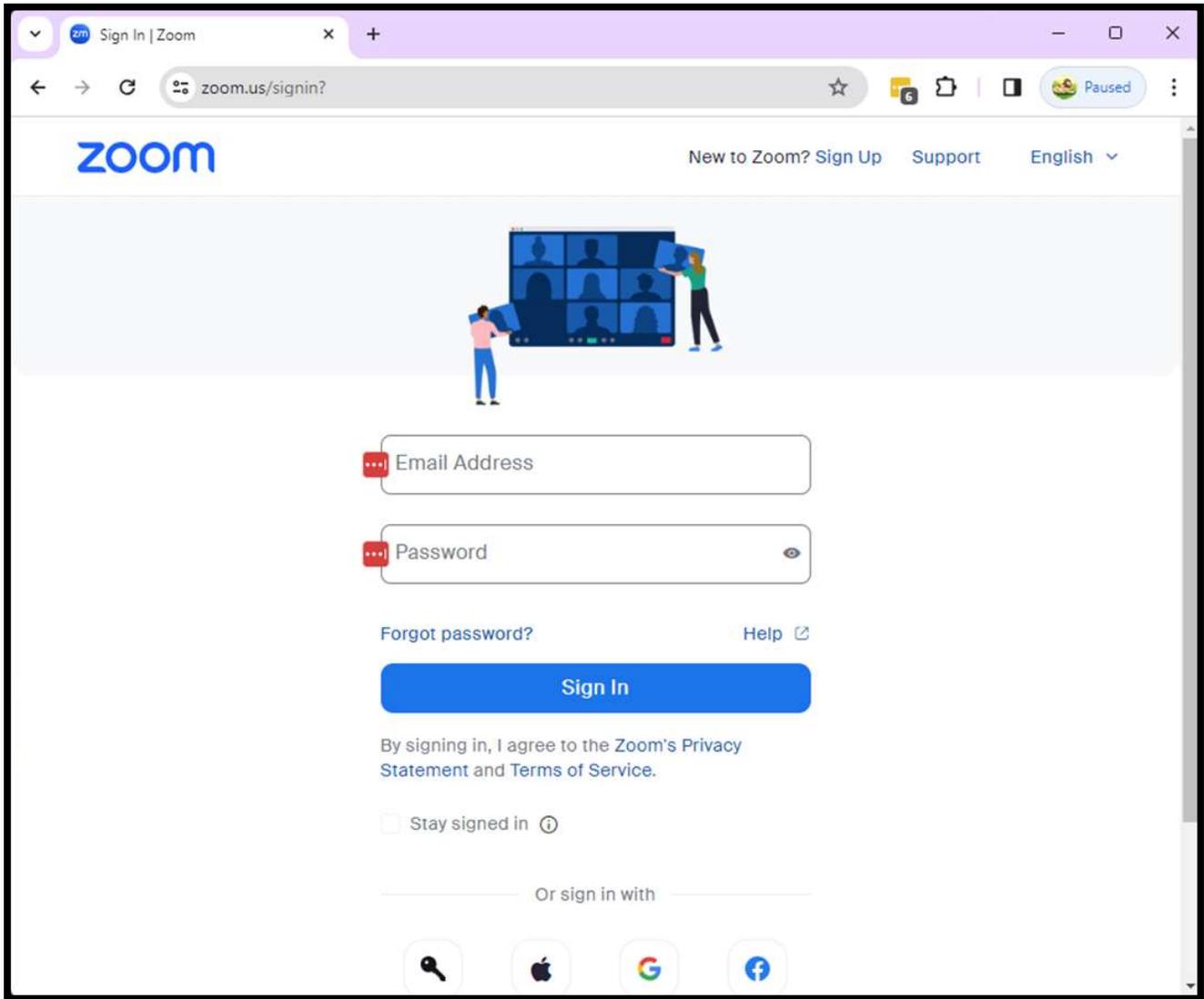
2.1 How to Install PCI Pal

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

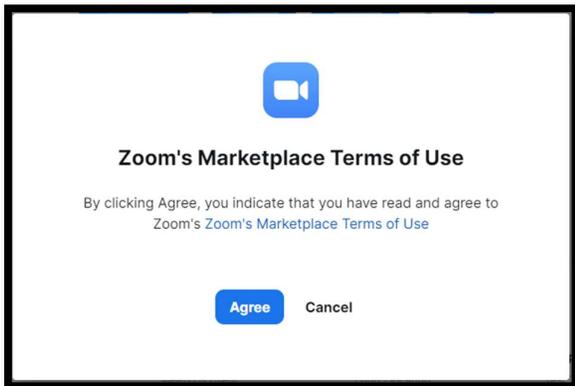
Alternatively, you can search for PCI Pal in the Zoom App Marketplace via the search bar in the top right corner



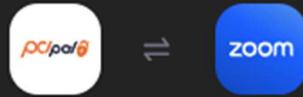
A Zoom Admin will need to be logged into the Zoom account on the web browser to install the PCI Pal App.



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



This will progress to the following page:



You are about to add PCI Pal Secure Payments

JR

.com

[Switch Account](#)

Note

- This app and its use of your data have not been reviewed or evaluated by Zoom. Use the app only for testing or validation purposes; only allow it if you wish the app to have access to the data below.
- App can access and manage this information even when not using the app.

[Learn more](#)

App can view information

Associated with you

- Profile & Contact Information >
- Settings >

Associated with you and others who participate in Zoom experiences with you

- Content >
- Functional >
- Product Usage >
- Participant Profile & Contact Information >

App can manage information

Associated with you

- Settings >

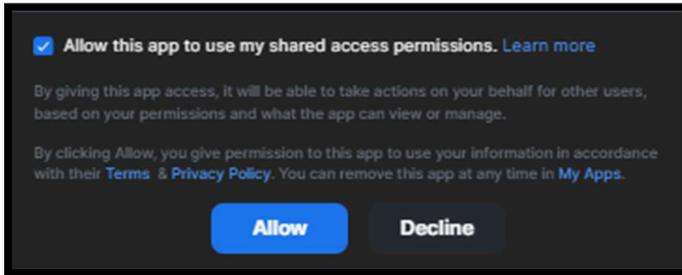
Allow this app to use my shared access permissions. [Learn more](#)

By clicking Allow, you give permission to this app to use your information in accordance with their [Terms](#) & [Privacy Policy](#). You can remove this app at any time in [My Apps](#).

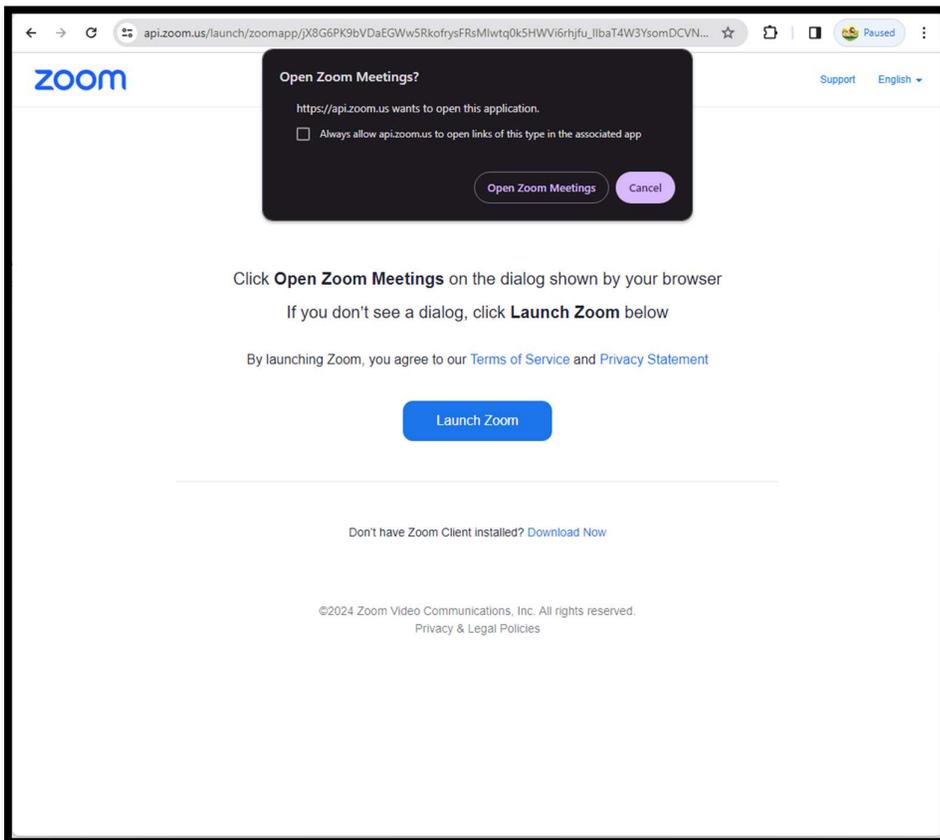
Allow

Decline

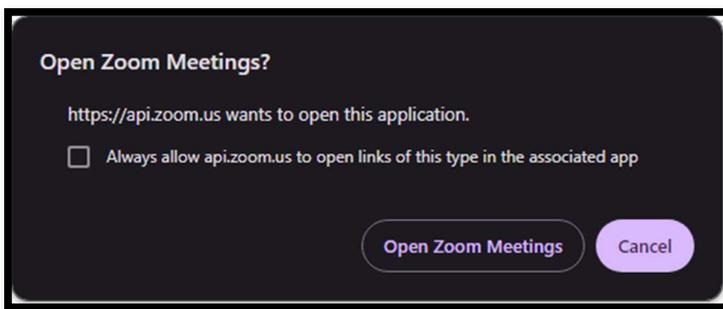
Check the 'Allow this app to use my shared access permissions'.
Click on 'Allow' for shared permissions.



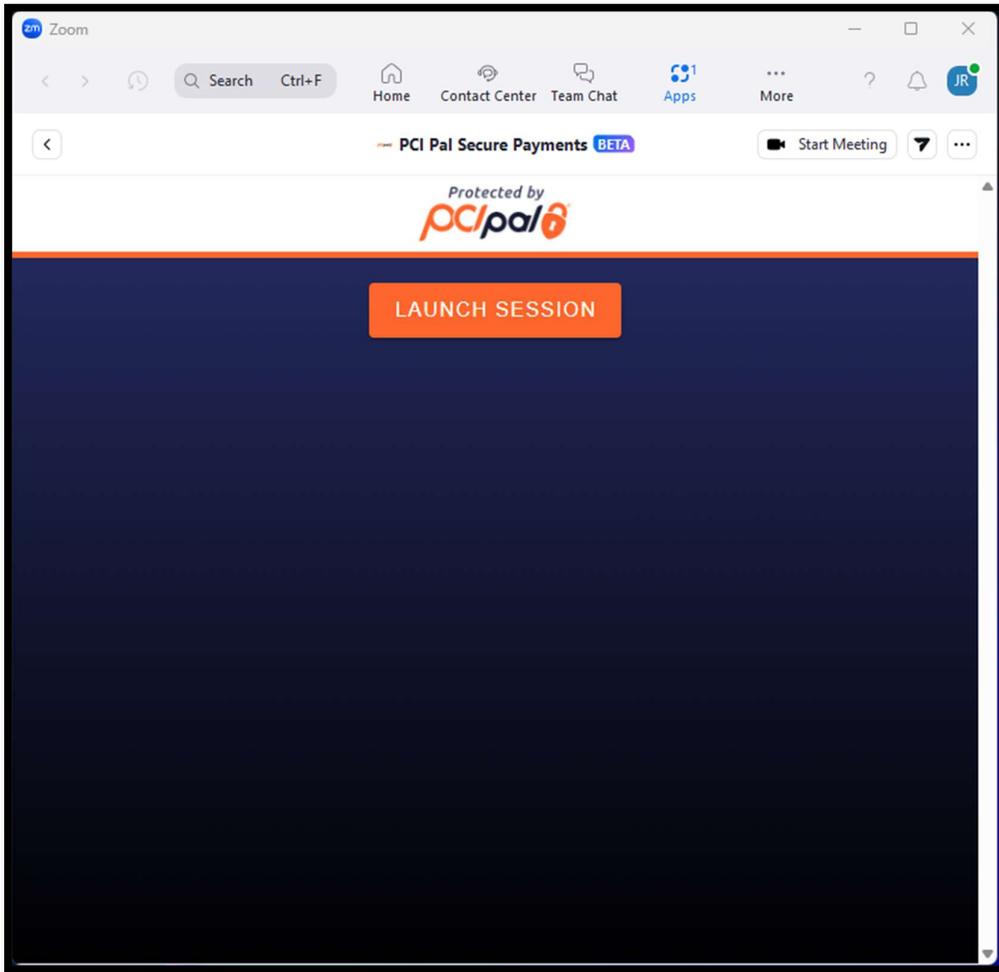
You will then be asked to open up your Zoom Desktop software.



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.



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'

App Marketplace > PCI Pal Secure Payments

PCI Pal Secure Payments
By PCI Pal
Works In: Zoom Phone, Zoom Contact Center

Add for Others

Overview: what is PCI Pal Secure Payments

This app is not listed in Zoom Marketplace

Zoom Integrations help users automate their communication workflows. [Learn more about integrations](#)

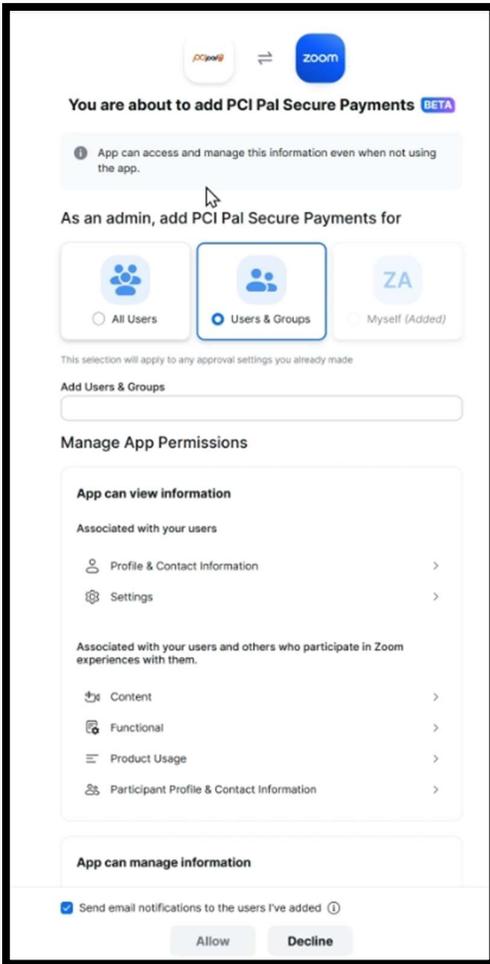
Security & Compliance **Customer Service**

Enhance your Zoom Communications with PCI Pal's Secure Payment Solutions Whether you're a small startu or a large enterprise, PCI Pal seamlessly integrates with your Zoom Phone and Zoom Contact Centre, offering a secure and streamlined payment processing experience. Click [here](#) to find out more. PCI Pal's Agent Assist - [Show more](#)

Launching a Payment Session

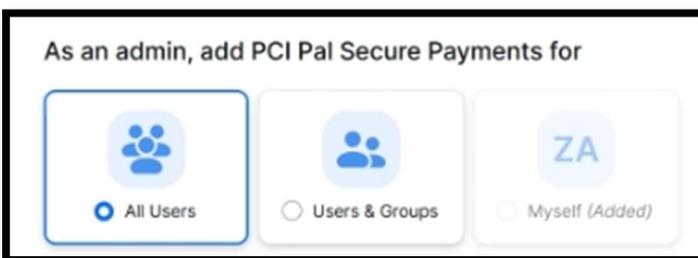
01.Public 8 20/05/2024 PCI Pal®

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



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.

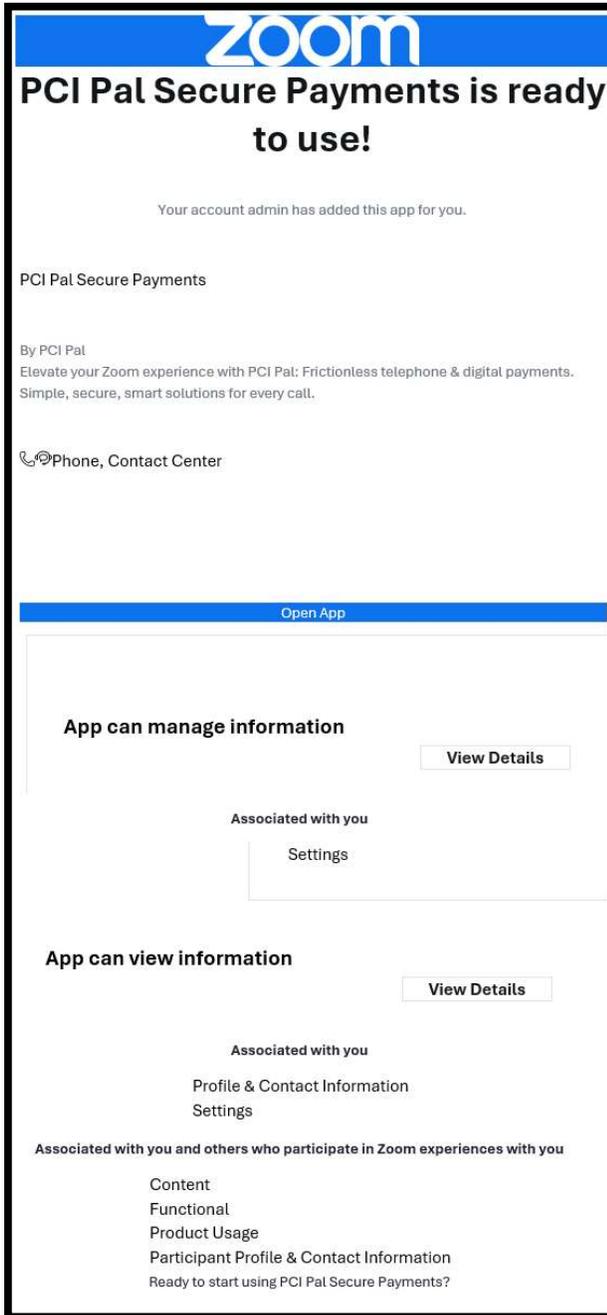


(Optional) Deselect the Send email notifications to the users I've added checkbox to prevent Zoom from sending an email notification to the users you are adding the app for. By default, this option is selected.

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



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.

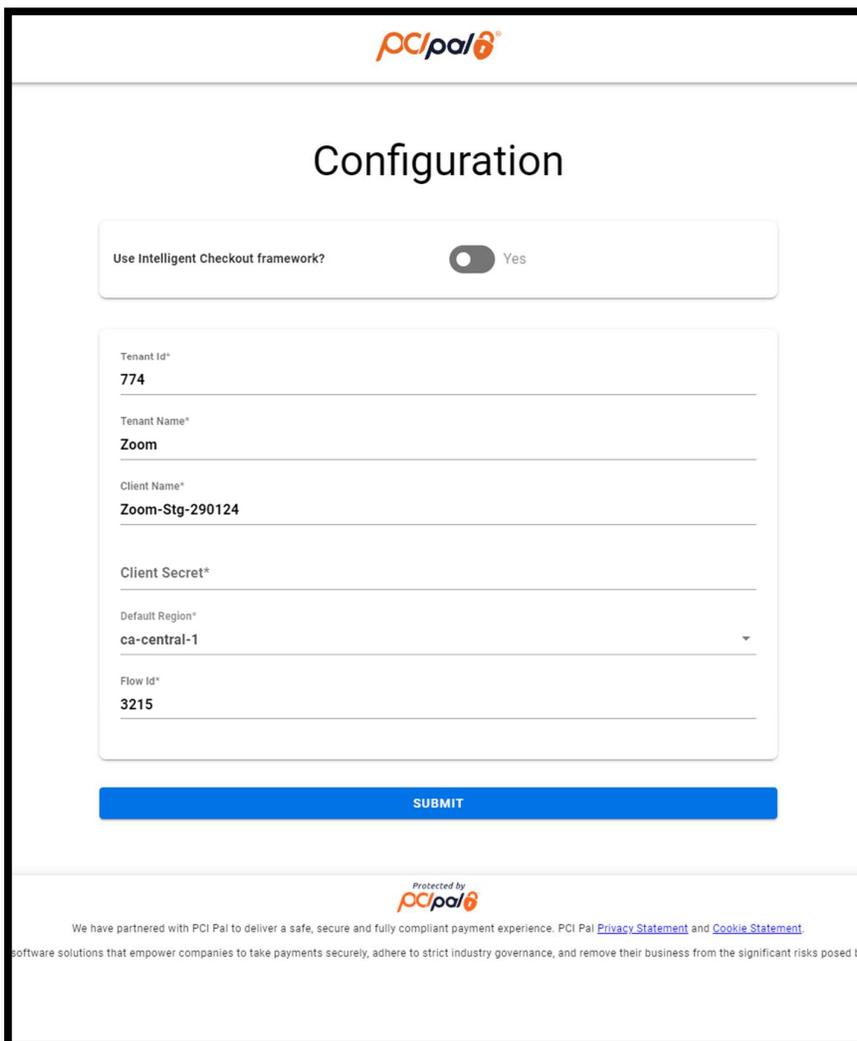
The onboarding project will set up your payment journeys and have them connected to your company financial accounts in order to take payments from your customers.

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).

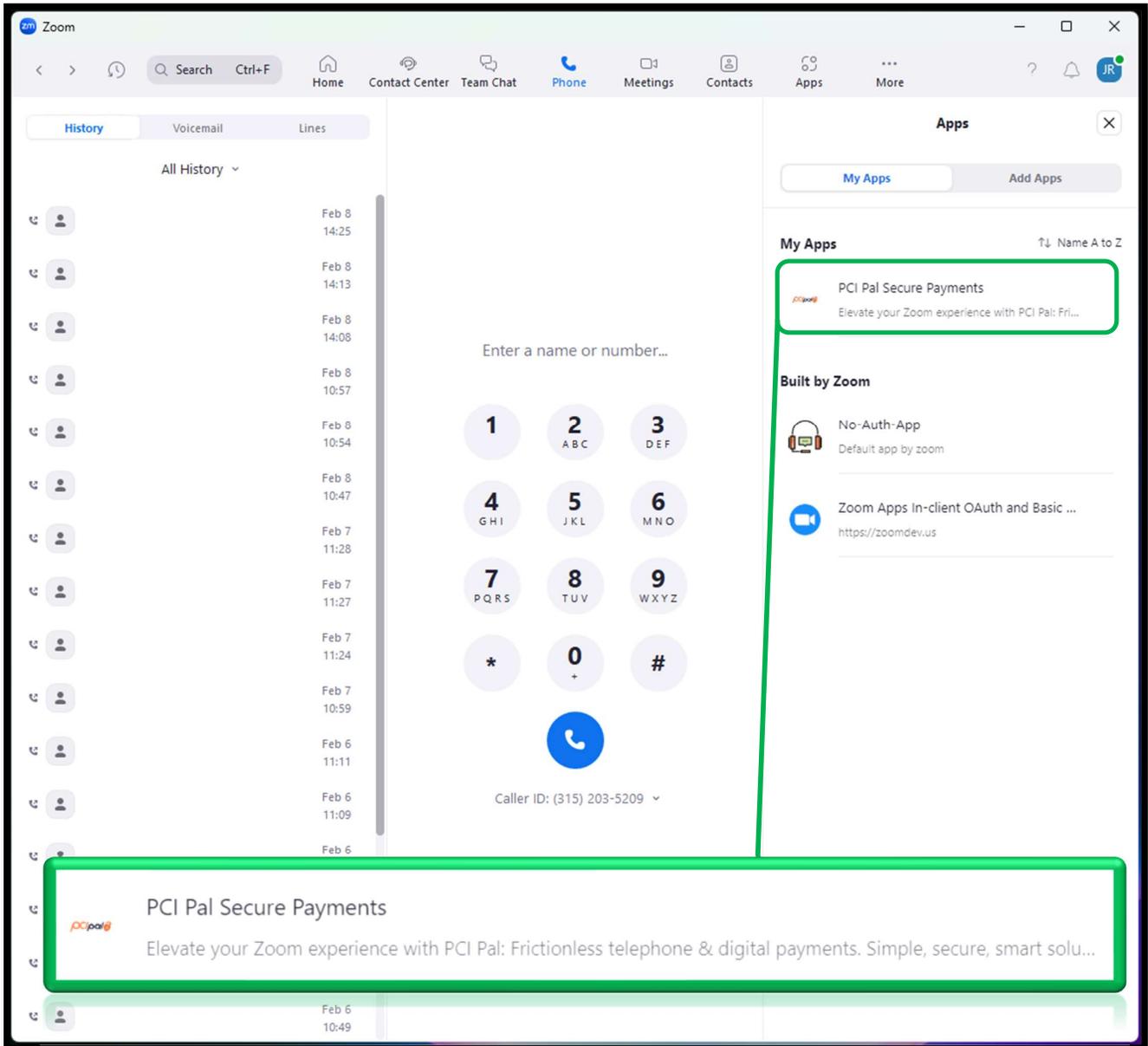
If you have not already purchased PCI Pal, please [Contact Sales](#)



The screenshot shows the PCI Pal Configuration page. At the top, the PCI Pal logo is displayed. Below it, the word "Configuration" is centered in a large font. There is a toggle switch for "Use Intelligent Checkout framework?" which is currently turned on to "Yes". Below this is a form with several fields: "Tenant Id*" with the value "774", "Tenant Name*" with the value "Zoom", "Client Name*" with the value "Zoom-Stg-290124", "Client Secret*" (which is empty), "Default Region*" with a dropdown menu showing "ca-central-1", and "Flow Id*" with the value "3215". At the bottom of the form is a blue "SUBMIT" button. Below the form, there is a footer section that says "Protected by PCI Pal" with the logo, followed by a small disclaimer: "We have partnered with PCI Pal to deliver a safe, secure and fully compliant payment experience. PCI Pal [Privacy Statement](#) and [Cookie Statement](#). software solutions 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.

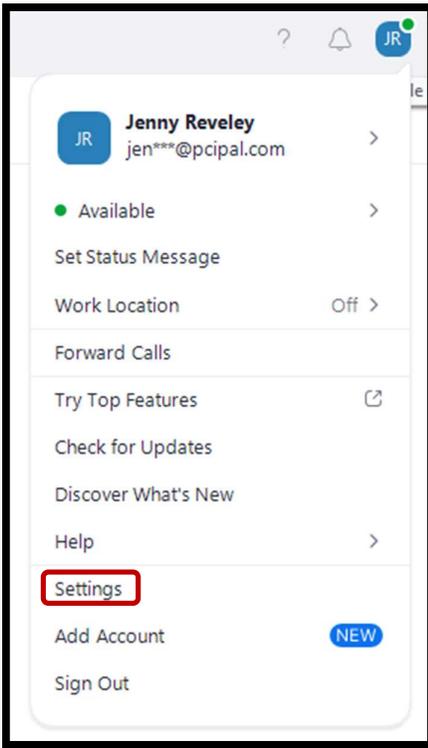


To understand how the PCI Pal App works and the payment journeys possible, please review the relevant user guides on our Marketplace.

3 Uninstalling the PCI Pal App.

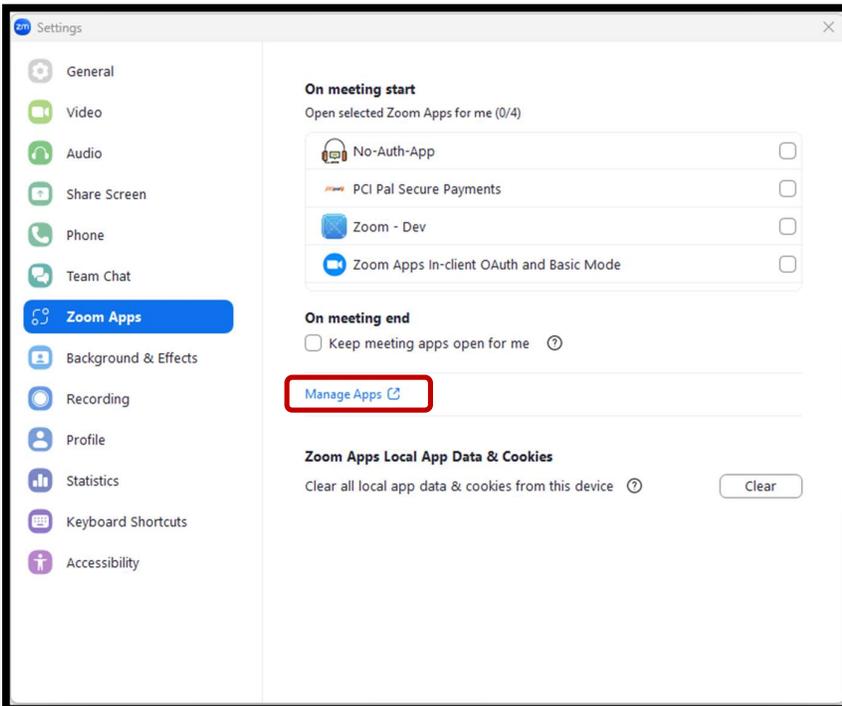
Log into Zoom App Marketplace on a Web Browser.

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



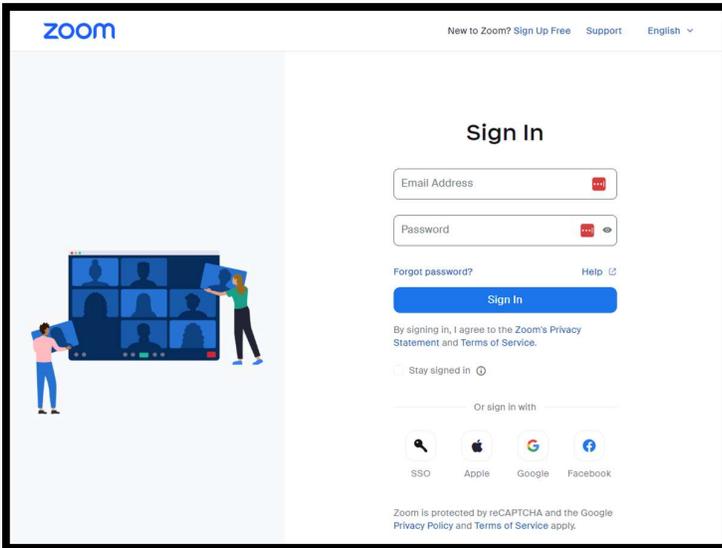
Click on 'Zoom Apps' from the left hand menu.

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



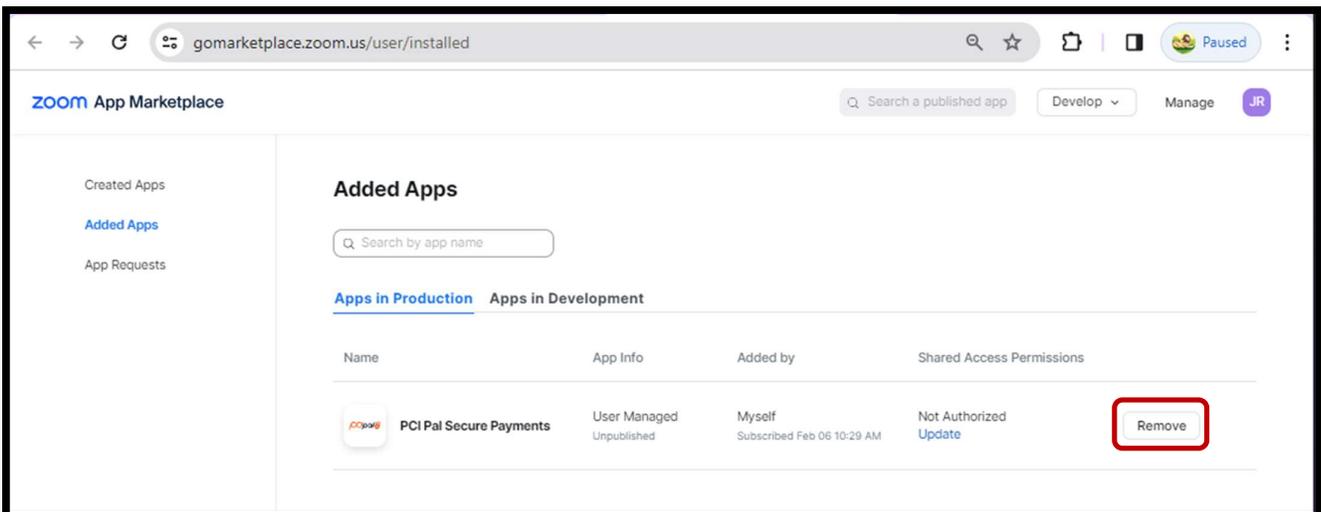
This will open up your default browser and take you to the Marketplace.

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.

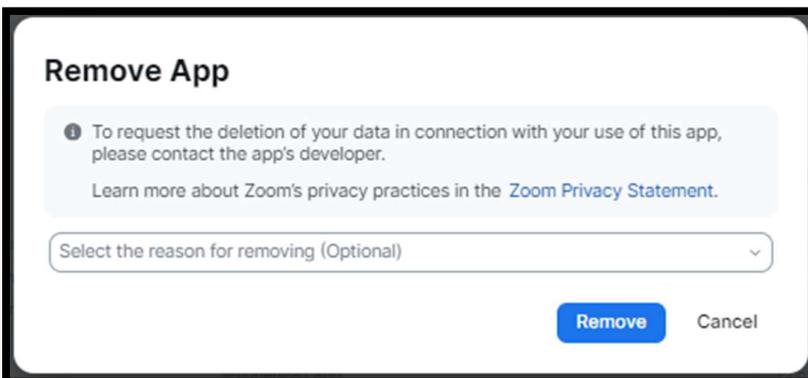


You have the **option** to send feedback as to your reason for removal.

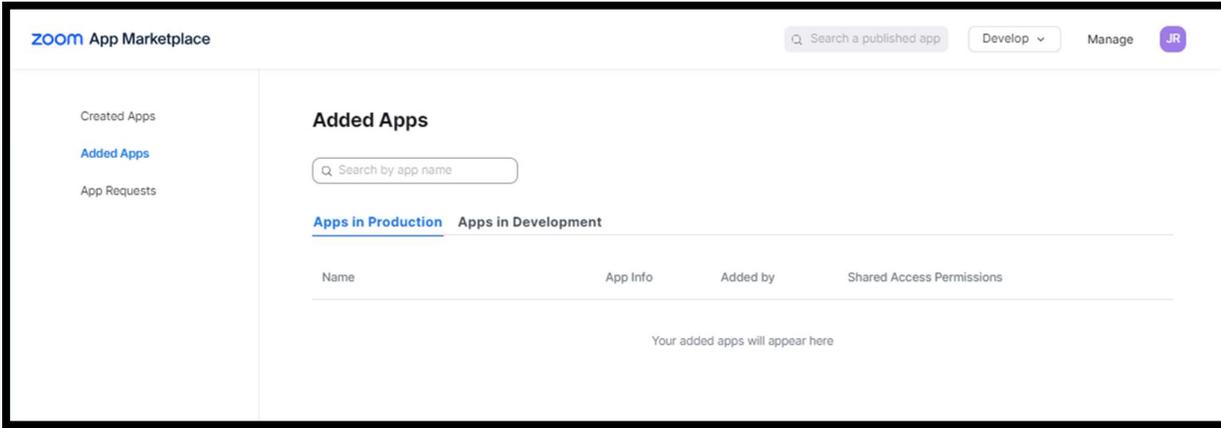
Should they be applicable, the options are:

- Quality Issues
- Abuse, fraud or spam

Else, click 'Remove'.



This will have removed the app from your account



All configuration details will have been removed.

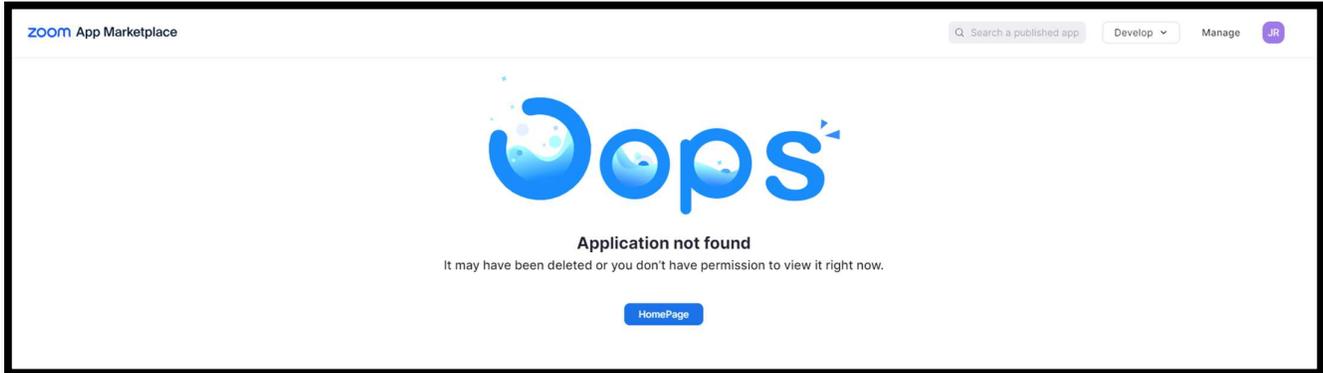
PCI Pal will disable the Payment Journeys.

4 Errors you may encounter

Unable to access App on Marketplace

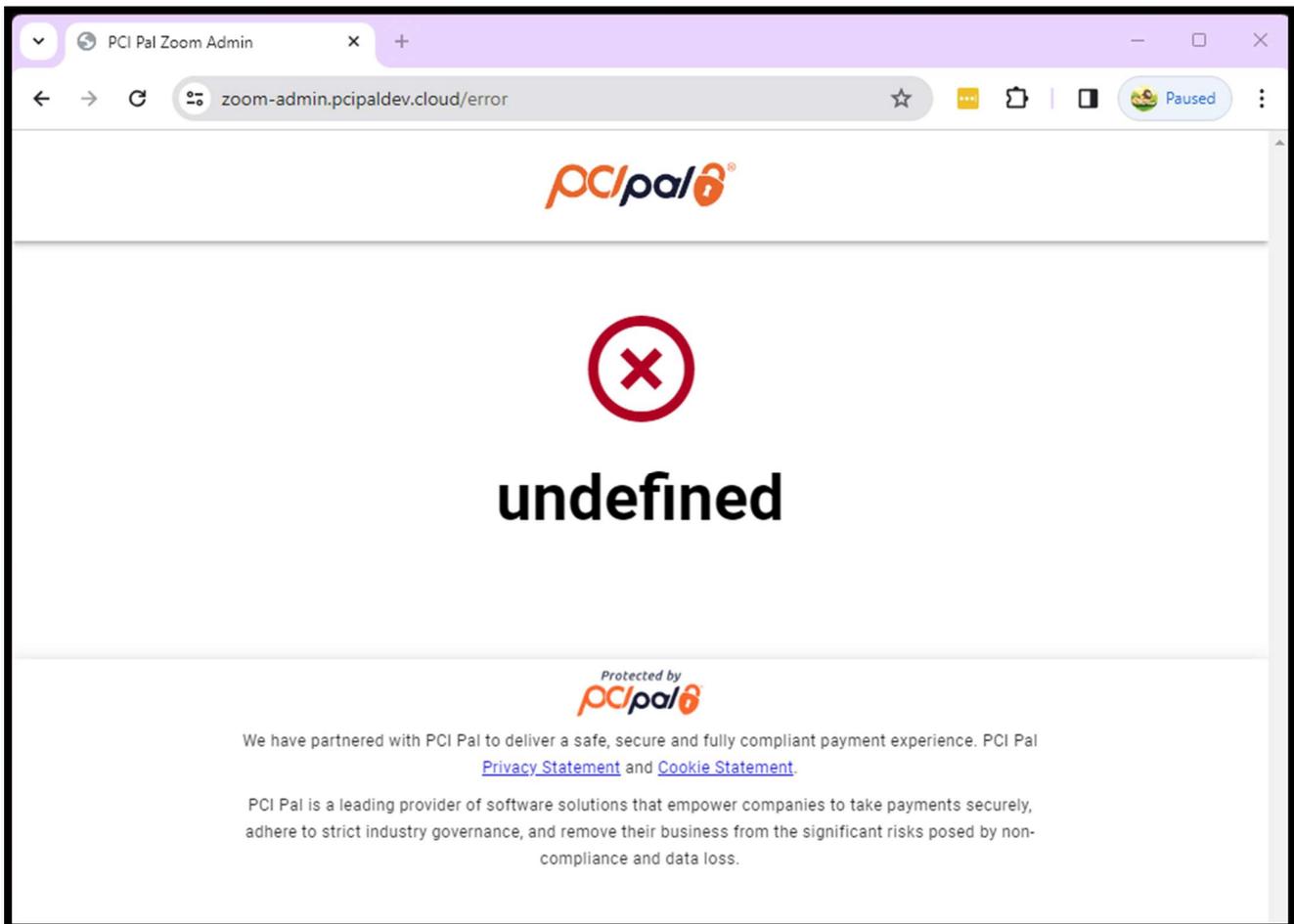
You may encounter this if you are trying to add the app to an unauthorized account on Marketplace. For example, trying to access Marketplace Go (Staging) from a production account.

Alternatively, the link to the App was incorrect.



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]