Zoom Admin Guide

The following summarizes the basic steps to integrate Zoom into your Salesforce deployment.

- Obtain and install Zoom app
- Configure Zoom app to connect to your Zoom account and enable desired features
- Setup user access to Zoom app

I. Obtain and Install the Zoom App in Salesforce

If Zoom app is published to AppExchange, you can get it from AppExchange.
Before Zoom App is published to Salesforce AppExchange, you can use the following link to install.

Zoom App package link: zoom app v2.9
https://login.salesforce.com/packaging/installPackage.apexp?p0=04t1S000000kZg31

1. Copy this link to browser. If prompted, log in to your Salesforce admin account, you will see the following picture.
2. When shown the install options, select the option you would like to have installed and select “Install” to begin the installation. For security reasons, select “Install for Admins Only”.

3. Give access to Zoom API and so on, click “Continue”. Then the app will be installed.

4. You can check whether the app is installed successfully in the following page.
II. Configure Zoom Credential

1. Get API Key and Secret

Case A: Get API Key && Secret from JWT app
Login to your Zoom account as an admin and navigate to the https://marketplace.zoom.us. Sign in--> Develop --> Manage App --> created apps --> App: type--JWT -->app credential -->API key and secret

Case B: Create A JWT app to get API Key && Secret
If you can’t find JWT app in your market, please follow the following steps to create one
   1. Sign in--> Develop --> build App
Start building a new app

* 1) populate your App Name, such as ‘SFDC integration’
* 2) Intend to publish: No
* 3) App Type: Account-level app
* 4) Authentication type: JWT API Credentials

-->click Continue

* 1) populate your company name
* 2) populate contact name
* 3) populate contact email address
2. Save or remember the “API Key” and “API Secret” as it will be used in a later step.

2. Setup API Key and Secret on Zoom config page

1). Go back to your Salesforce admin portal and bring up the App Launcher.
2). Click on Zoom Config and fill in:

- API key and API secret that you obtained earlier from your Zoom admin account
III. User Setup for Access to Zoom Phone

1. Add users to Zoom Permission Set

1). In classic. Navigate to Setup -> Administration Setup -> Manage Users -> Permission Sets -> Zoom Admin or Zoom User -> Manage Assignments -> Add Assignments.
2). In lightning. Navigate to Setup -> Administration -> Users -> Permission Sets -> Zoom Admin or Zoom User -> Manage Assignments -> Add Assignments.

Zoom Admin has the following privileges:
+ setting for api key and secret(org level setting)
+ customized objects read/write
+ visual force pages in zoom package

Zoom User has the following privileges:
+ customized objects read/write
+ visual force pages in zoom package

2. Add users to Call Center Set

1). bring up to the Setup page;
2). enter “Call Centers” in quick find;
3). Select “Call Centers” tab;
4). click “Continue” button and bring you into next page;

5). Edit “Zoom Phone Call Center” and click “Manage Call Center Users” button.
**Note**: In lightning, you need to edit the Call Center Detail Info, set Softphone Height to 550 (in classic, 500 is fine), otherwise a scroll bar would show in your phone panel.

6). Click “Add More Users” button, click “Find” button to find the user you want.

7). Select users and click “Add to Call Center” button.

After above operation, you can attach to Zoom phone function in classic.
3. Configure Softphone Layout

1). bring up to the Setup page;
2). enter “Call Centers” in quick find;
3). Select “Softphone Layouts” tab;
Create “ZoomPhoneLayout”, configure inbound and outbound call screen pop setting as above picture.

Set “ZoomPhoneLayout” as default layout.

Make sure that the login user profile has assigned the right phone layout. You can click “Softphone Layout Assignment” button to check the assignment.
4. Additional Configuration for Lightning

If you want to use Zoom app in lightning, you need some additional configuration, now let's talk about it. Take the sales application as an example.

1). bring up to the Setup page;
2). enter “App Manager” in quick find;
3). Select App Manager tab;
4). Find “Sales” application of Lightning;
5). Edit it, then click “Add Utility Item” button;
6). Select “Open CTI Softphone”;
7). Fill in the label as you like and save it.

8). Go to Sales application and you will see the Zoom phone function in the bottom.
IV. Configure OpenCTI Adapter Url

If Click To Dial is not working for some or all users, you need to configure ‘CTI Adapter URL’.

You can get the CTI adapter url by following steps.

If you have logged into zoom.us, please log out first.

1. Go to Setup -> Visualforce Pages and click the Preview icon next to the ZoomVoiceLogin page.
2. After the page opens in a new tab or window, copy its URL. For example, the full URL is: https://zoomus--zoomsand2--zoom-app.cs29.visual.force.com/apex/ZoomVoiceLogin. Close the tab.

3. Setup-->Call Centers and click “Continue”;
2. Edit ‘Zoom Phone Call Center’;

3. Paste the copied URL from ZoomVoiceLogin page to CTI AdapterURL, then click Save.
V. Enable and Configure Zoom Phone features

Please ask Zoom PBX support to turn your ‘Enable Salesforce’ on.

* Enable Salesforce
VI. Zoom Phone Main Features Introduction

1. Zoom Configuration page

Zoom Setting is a global setting over your org. Only User with ‘Zoom Admin’ permission set could view and edit this section. Zoom API Key and Secret is the account level credential of your company. You can configure this page referring to “Configure Zoom Credential” chapter II.

2. User Login

1. Click “Sign In” button;
2. Jump to the login page ([https://zoom.us/oauth/authorize](https://zoom.us/oauth/authorize));
3. Use your zoom phone user/password to login in;
4. If you have call plan, you will login successfully, the success page will close after 3 seconds;
5. You can use dial function in Salesforce platform.
3. Making Telephone Calls

- **Inbound Call**

Before you make calls, you need to login Zoom client and Zoom app in salesforce.

1. If someone calls you, you will see the following page;

2. Zoom app will auto save callLog to task in salesforce and pop up a message which let you know callLog saved successfully.

3. If the call signal changed, it will update signal status and duration of task in salesforce, e.g. from ringing to answered or End.

4. You can also change the subject, Contact/Lead, Relate To or Comments field, it will automatically update the task object in 5 seconds.

5. It's important to note that you can't relate a lead to an account or other object.
6. When the call Ends, click “Done” to update task, and the callLog will be removed from the panel.

7. About the popup window when getting new calls, please refer to chapter III.3

- **Outbound Call**

You can make a call from Contact or use the Zoom app dial page.

If you click the phone icon of any Phone field, it will pop up a box to let you open the Zoom client. (Fail to popup or launch zoom client? please check FAQ)
Use the Zoom client to make an outbound call.

You can use Zoom app to dial directly. The following process is the same as above.
• The Contact’s Name

The name will match the first contact/lead whose phone number is the same as the outbound or inbound call number. If it doesn’t match anyone, it will show ‘New Contact’.
● Contact/Lead in CallLog Panel
We search the Contact and Lead from SFDC, set the result as dropdown options
1. If SF database has corresponding task and task whoid is not null, we assign whoid
   To Contact/Lead Field in CallLog panel
2. If SF database don’t have corresponding task, we do the following logic
   2.1) if only one option in the dropdown list, we will set it as default value of Contact/Lead
   Field.
   2.2) If multiple options in the dropdown list, just leave it blank.
● Related to Field in CallLog Panel
1. Relate to search type: it is the types that should be listed in the Lookup relationship
   field(whatid) on Activity Object
2. If you select relate to type, you can search the concrete data by the type you choose.

4. Task Page Layout Configuration
Before you see call information in task list, you need to configure task layout.
1). Navigate to Setup -> Object Manager -> Task.
2). Click “Task” edit the task page layout;

3). Add the new Section to Task page layout, name it as ‘CallLog Details’ and drag the visualforce page #’ZoomCallLogDetail’ to this section.
Note: set callLog detail section height to 150 in lightning and 120 in classic.

5. Call Log History

In Lightning, Sales App-->Tasks Tab, you can find the callLog history.

You also can find the activities in contact or account detail page.
VII. Upgrading Zoom App

If the app is published to AppExchange, you can check for the Latest Version from AppExchange.

1. In Salesforce under Setup > Installed Packages > you will see the Zoom App with version number mentioned.

2. To know the latest version of Zoom app, go to App Exchange Link - Zoom. Under “Additional Information”, you will find the current package version, release date and other details.
VIII. Frequently Asked Questions

1. If you have installed any other pbx service app, zoom client will fail to launch when you click the phone number on salesforce page or Call button on Dialer Pad.

2. If you open multiple browser tabs or browsers, Both tabs/browsers save your call into one Salesforce record (Task and zoom callLog).

3. Add one more custom field to Activity object, if you reach the field limitation of Activity, you will fail to install zoom app.

4. Softphone Layout configure issue, e.g. can’t pop up new contact page, make sure which softphone layout is assigned to the user you use.

5. If you can’t dial, make sure you have uninstall other phone app, such as RingCentral.

6. If you stuck on oauth callback page, please check your API key and secret and the remote site settings to give the callout permission for zoom related APIs.

7. When you fail to login in and give the error message that ‘This user is not a zoom phone user, please contact your account admin.’, you need to check whether you have calling plan.