Zoom Phone Integration

Integrations · https://learnpcr.pcrecruiter.net/site/docs/integrations/zoom-phone-integration/

The Zoom Phone integration allows for users to set up Zoom as their auto dialer for use inside of your database. This will act as a direct integration for all calls prompted within the system.

The integration will write incoming and outgoing call activities done directly from your Zoom app or when using the click to dial option inside of your database.

Please note that the phone number must exist inside of PCR in order for the activities to write automatically. Additionally, you will need a **paid Zoom account** to use this integration.

At this time, Zoom only supports voice dialing out of PCR and not SMS integrations. If you're interested in having SMS capabilities check out our RingCentral integration.

Please note that the integration is not currently available when utilizing Safari from a device using macOS. In order to utilize this integration on a Mac you will need to work out of the Google Chrome browser.

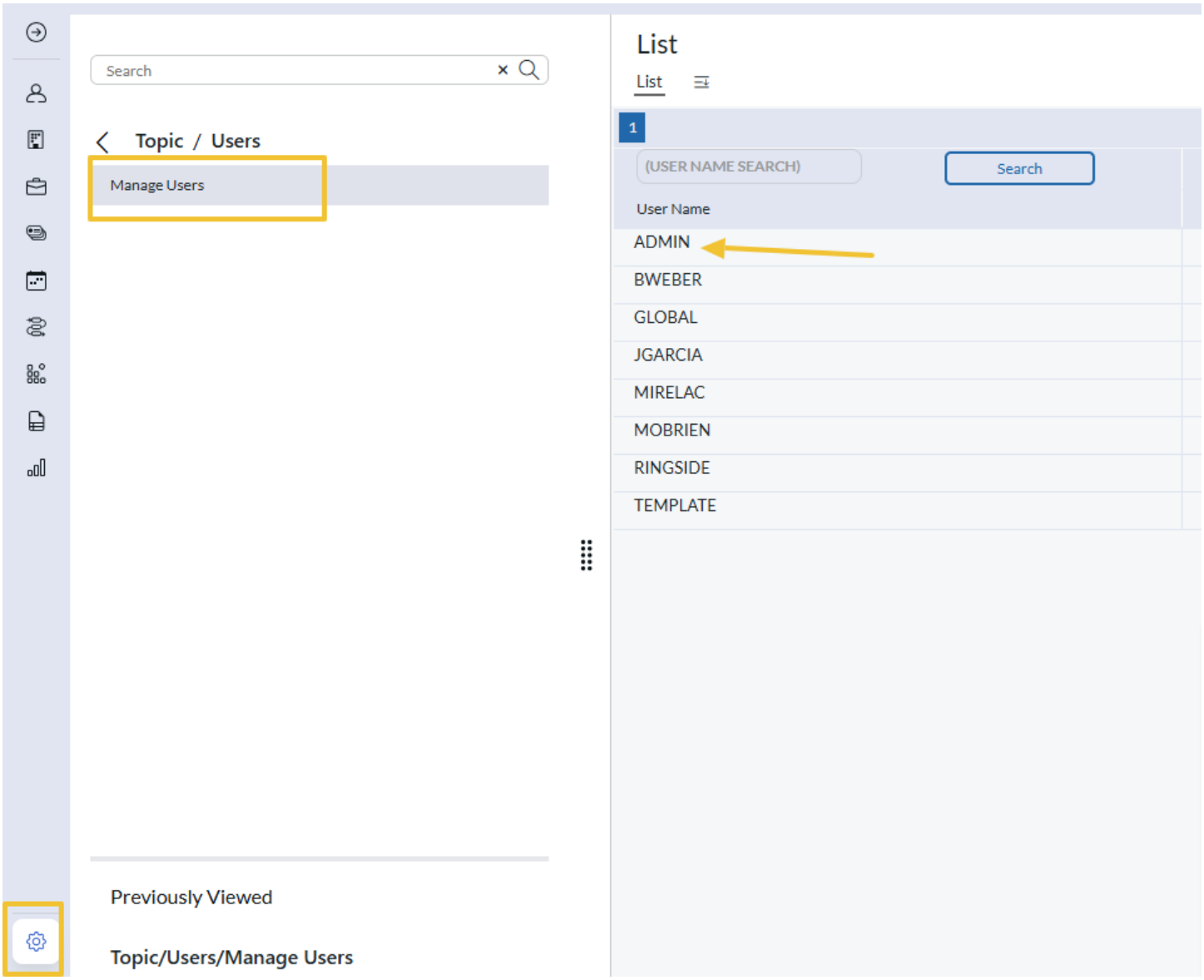
Zoom Setup Instructions

The Zoom integration Feature must be installed in your database. If you do not see this option please contact your account representative or support to get that feature turned on.

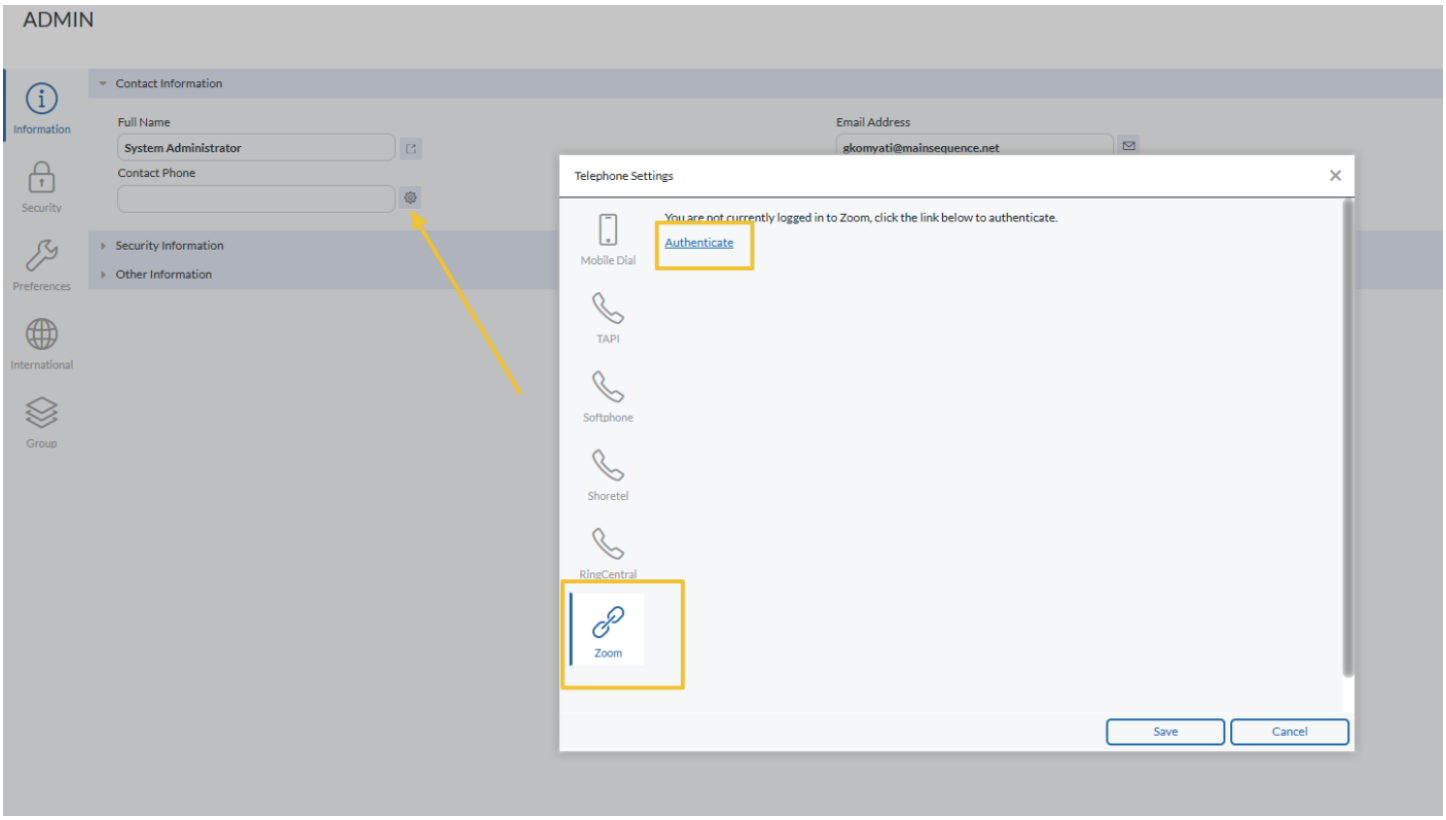
Turning on the Zoom Dialer in the database

The Initial Authentication of Zoom with PCRecruiter must be done twice for each user.

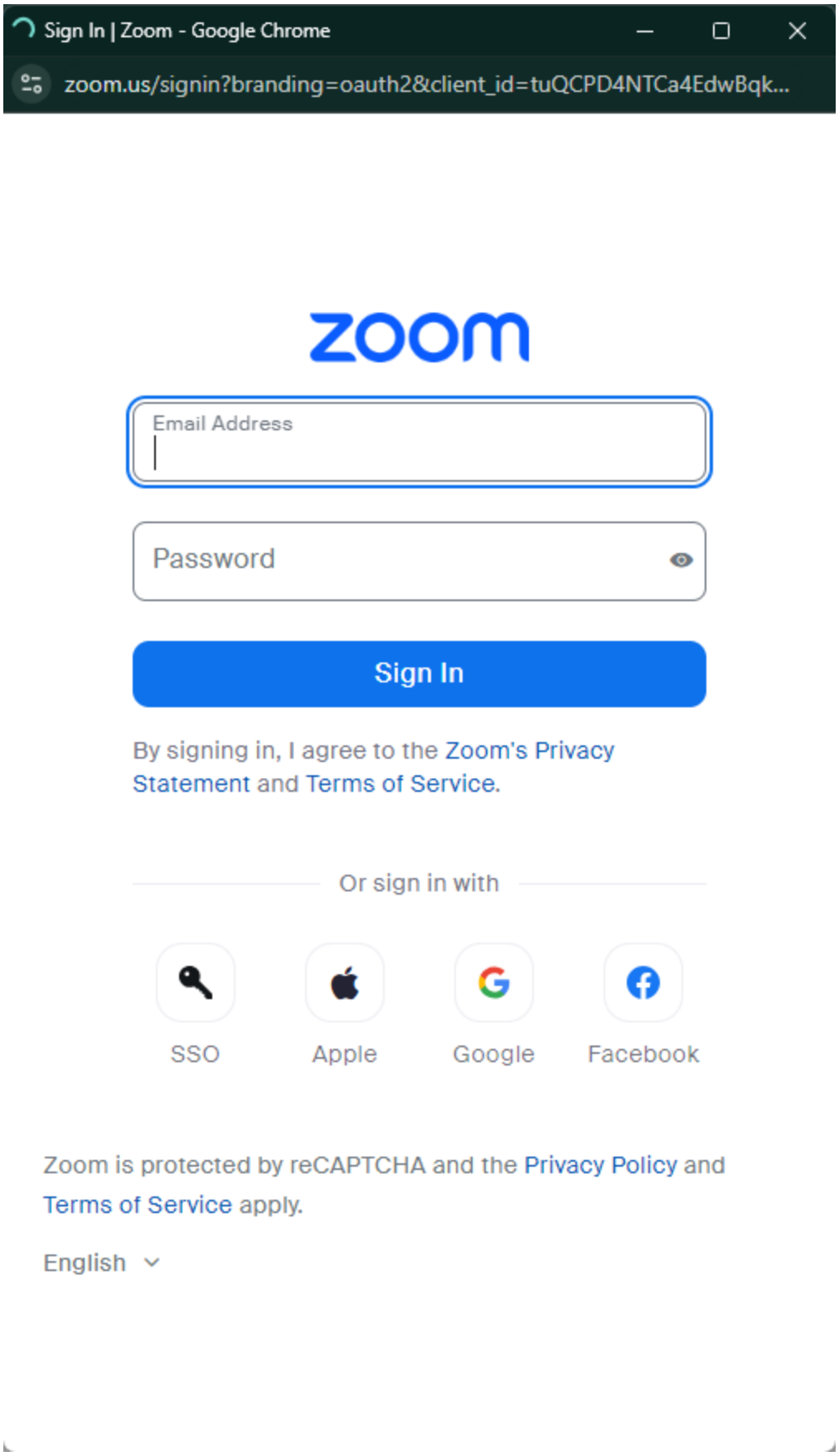
1. First, the Zoom integration must be authenticated from the User Record which can only be done by an **Admin User**. This allows automatic Activity sync to occur.
2. Navigate to the **Users** section under **Settings** (Gear icon in the bottom left corner).
3. Click **Manage Users.**
4. Select the Admin's **Username**.



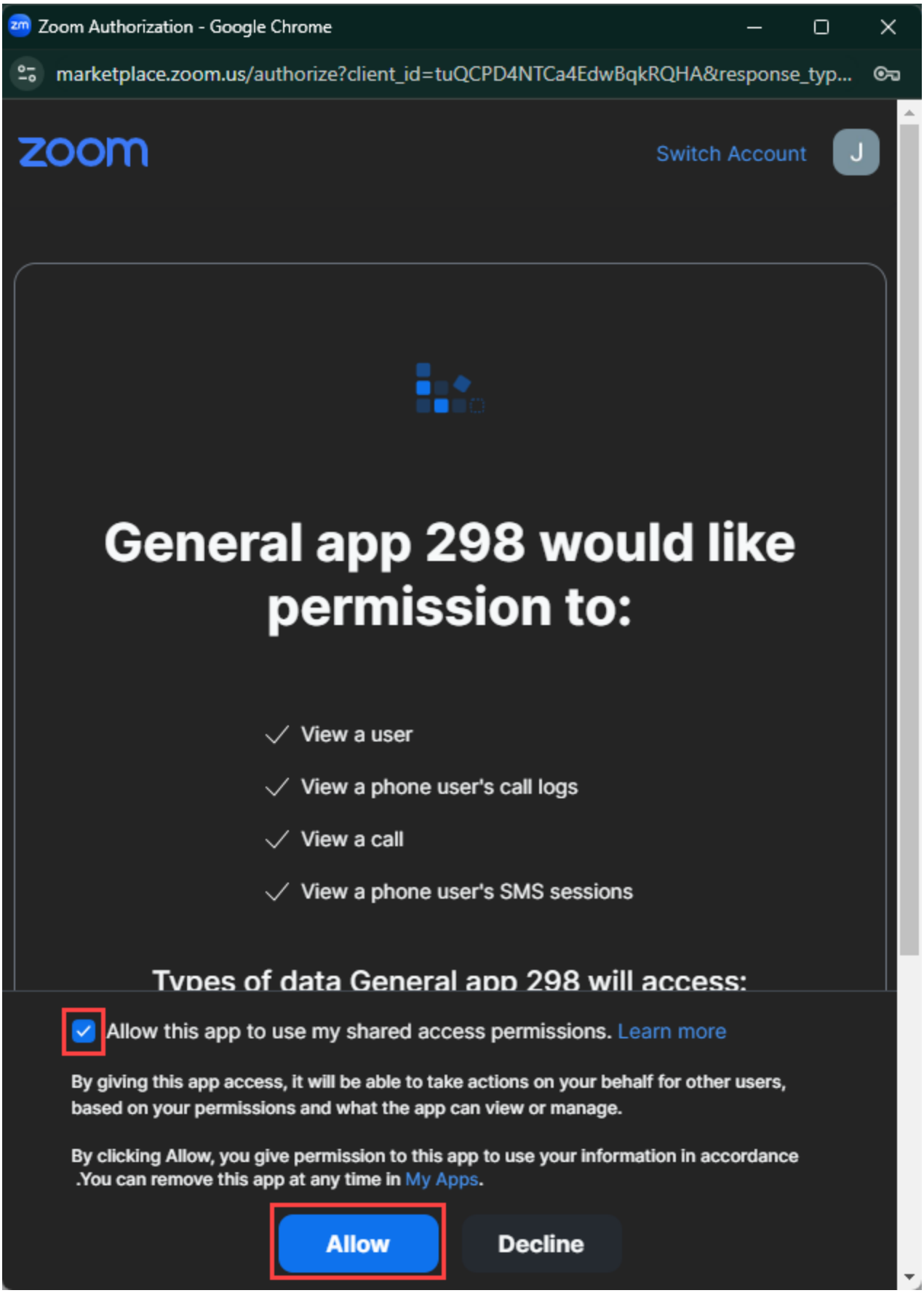
5. Under **Contact Information** click on the **Gear Icon** to the right of the Contact Phone field.
6. Click the **Zoom** option on the left side of the pop-up window.
7. Click **Authenticate**.



8. In the pop-up window, **sign in** using your Zoom Credentials.


Sign In | Zoom - Google Chrome
zoom.us/signin?branding=oauth2&client_id=tuQCPD4NTCa4EdwBqk...
zoom
Email Address
Password
Sign In
By signing in, I agree to the Zoom's Privacy Statement and Terms of Service.
Or sign in with
SSO
Apple
Google
Facebook
Zoom is protected by reCAPTCHA and the Privacy Policy and Terms of Service apply.
English

9. Click the **Allow Checkbox** and click **Allow** at the bottom of the window to give PCR access to use the Zoom dialer.


Zoom Authorization - Google Chrome
marketplace.zoom.us/authorize?client_id=tuQCPD4NTCa4EdwBqkRQHA&response_typ...
zoom
Switch Account
J
General app 298 would like permission to:
View a user
View a phone user's call logs
View a call
View a phone user's SMS sessions
Types of data General app 298 will access:
Allow this app to use my shared access permissions. Learn more
By giving this app access, it will be able to take actions on your behalf for other users, based on your permissions and what the app can view or manage.
By clicking Allow, you give permission to this app to use your information in accordance .You can remove this app at any time in My Apps.
Allow
Decline

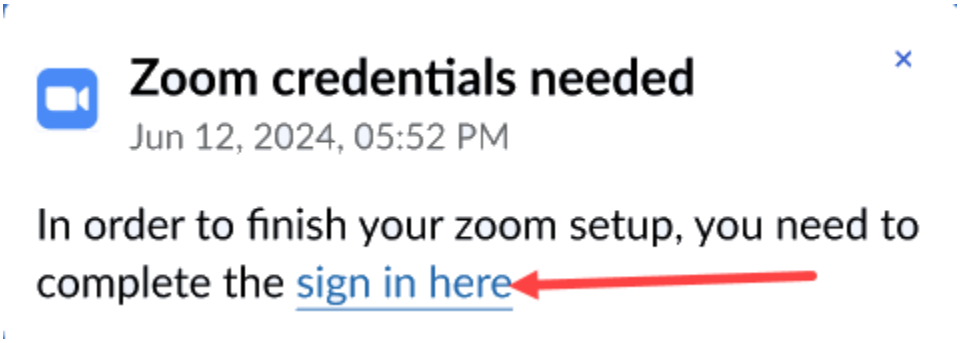
10. Click **save.**
11. This will allow all users in your database to access the Zoom authentication from their account. If you need to set up your own account you will need to sign out and sign back in to be prompted to log in to Zoom.

Because the User Record area is not accessible to non-admin users, the first authentication will require that you do one of the following:

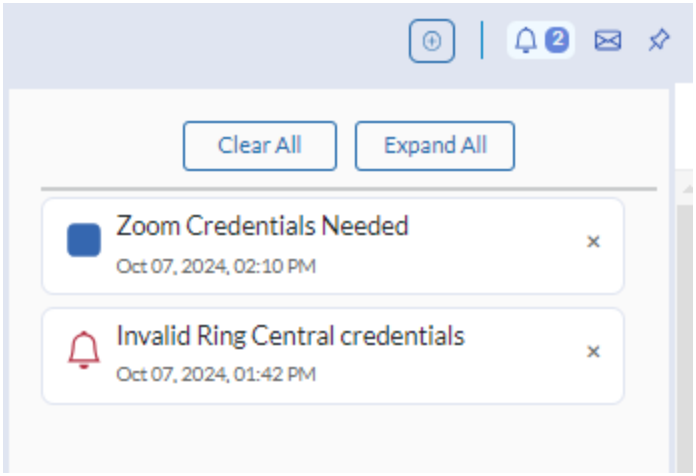
- Set the user's *System Administrator* security setting to "User Records, Locations" temporarily, allowing them to access their user account directly.
- Authenticate with Zoom on the user's behalf while logged in as an administrator. This will require knowing their Zoom account login information. You will also need to authenticate each user from a new Incognito Window since your previous login will be retained on the current browser session.

User setup

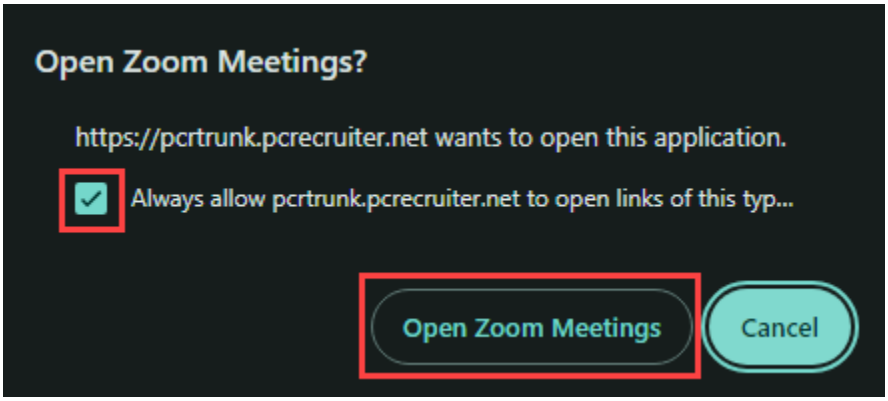
1. Next, the Zoom integration must be authenticated from the user's own computer the first time they log in post-authentication. This allows caller ID pop-ups to occur on their browser when an inbound Zoom call matches a known number.
2. Ensure that the Zoom app has been installed on the user's computer and they are logged in. The app must be open or running in the background to be able to dial out.
3. Have the user **Log in** to their PCR account.
4. A pop-up notification should show for the user that prompts them to authenticate their Zoom account. Click **sign in here** to open the Zoom authentication window. (If you do not see the notification pop up then click on the notification icon in the top right of the screen.)



Pop-up notification



4. **Click Sign in** and enter their Zoom credentials.
5. When dialing out for the first time you will see a Chrome pop-up that asks to allow PCRecruiter to open the Zoom application. **Check Always Allow** and then click **Open Zoom Meetings** to launch the dialer.

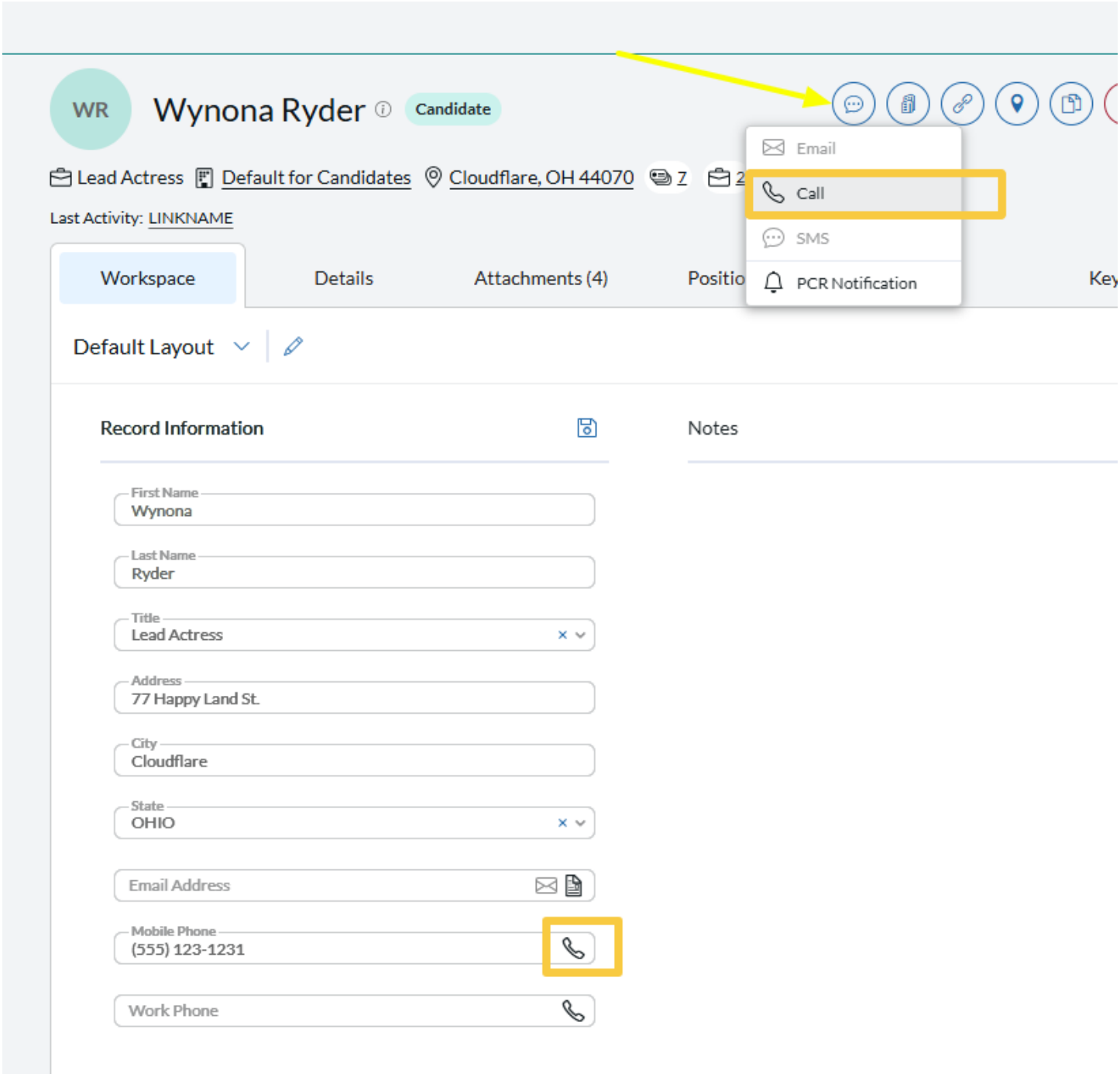


6. You can now use the dial function from anywhere in the PCR database.

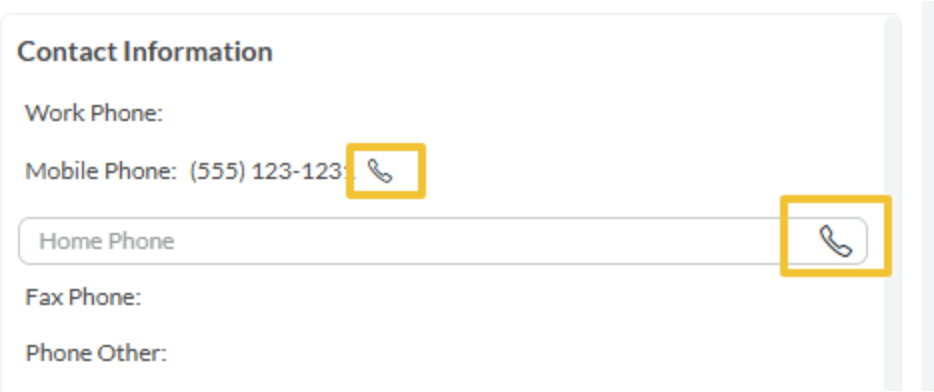
Dialing out of PCR

Using click to dial to call out of PCR can be done in a number of different ways, each of which have been described below.

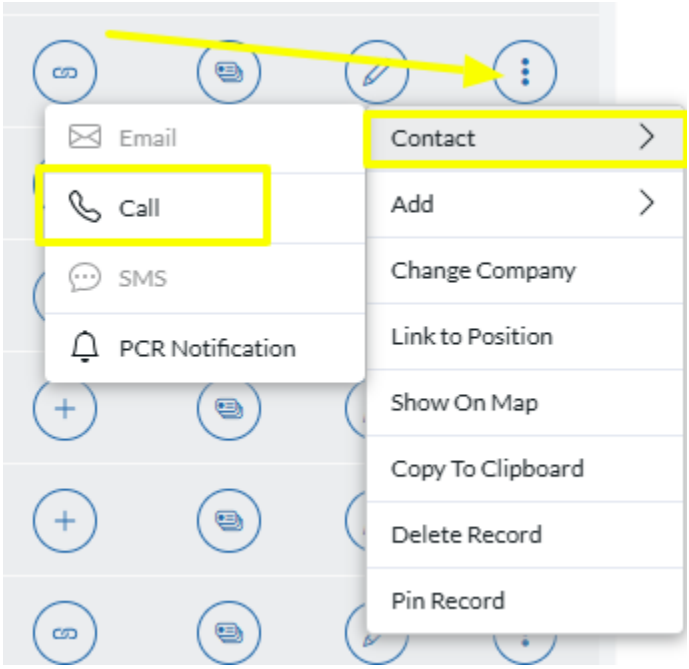
- Name/Company/Position Record
  - Click the phone icon to the right of any phone field in a field list Widget in the Workspace tab or from the contact icon in the top right of the record.



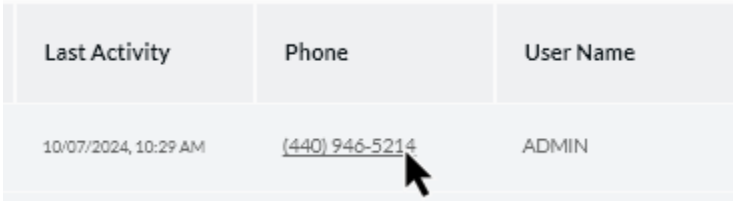
- From the Details tab of the name record click on the phone icon to the right of the phone field (Also works when editing a field).



- Record Grid
  - From a Record Search, Rollup, Activity Search, or Dashboard widget grid, click on the actions icon, click contact, select call.

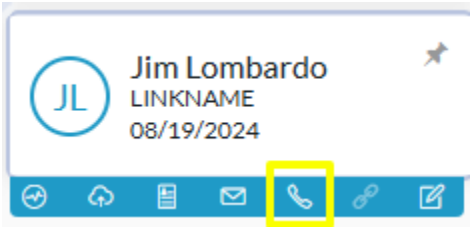


- From any Record Grid with a phone column, click on the number to dial.

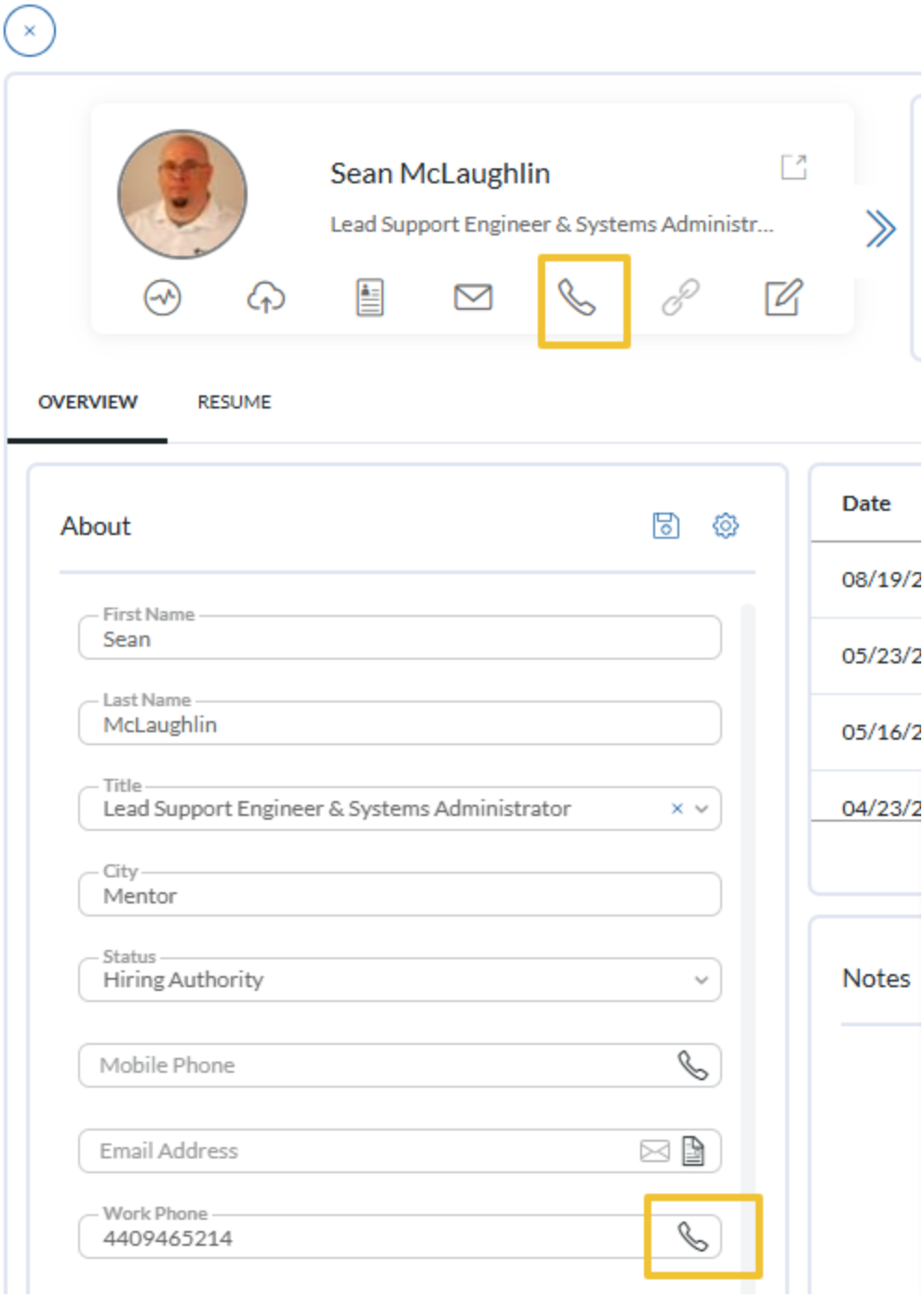


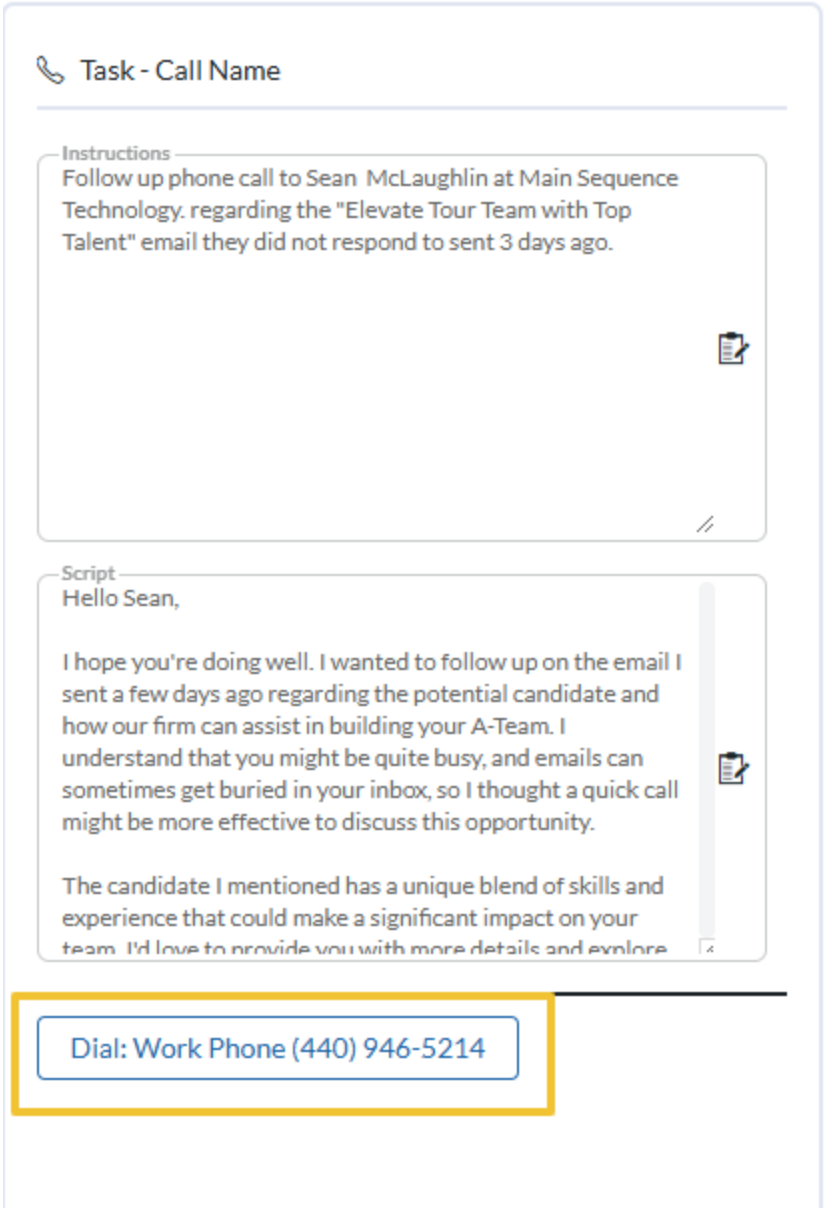
- Pipeline

- From a Candidate record card click on the phone icon to open an activity window then click the number you want to call. (If you do not see the icon please reach out to support for assistance changing this setting.)



- Simple Or Advanced Sequencing
  - From the Candidate record or field list icons.
  - From the action pane of a Call task.


Sean McLaughlin
Lead Support Engineer & Systems Administr...
OVERVIEW
RESUME
About
First Name
Sean
Last Name
McLaughlin
Title
Lead Support Engineer & Systems Administrator
City
Mentor
Status
Hiring Authority
Mobile Phone
Email Address
Work Phone
4409465214
Date
08/19/2
05/23/2
05/16/2
04/23/2
Notes



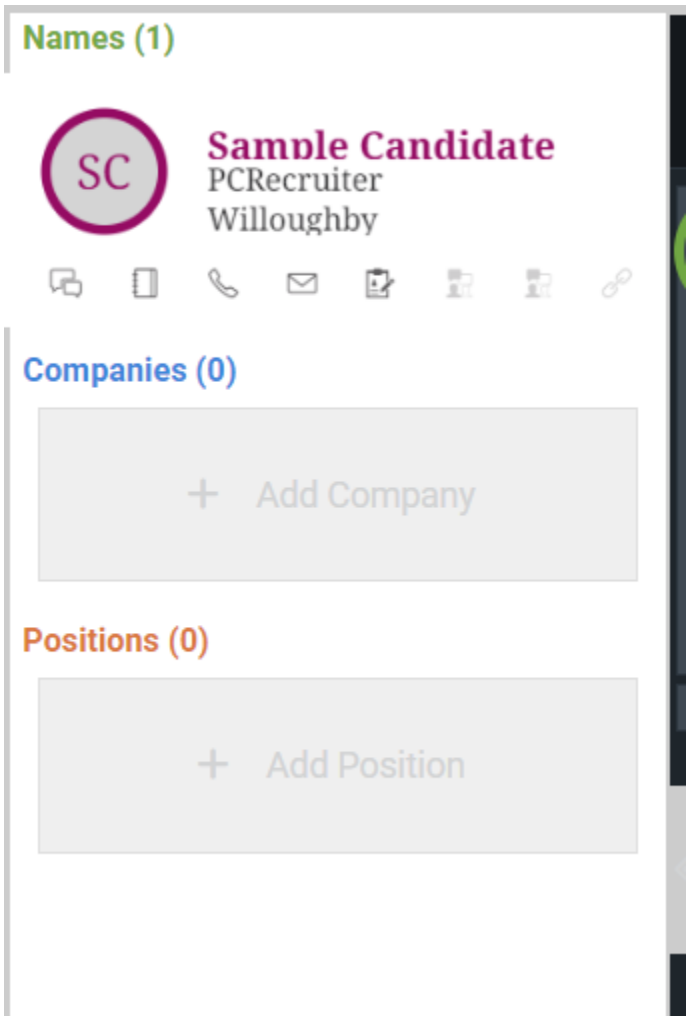
Incoming Call Notification

A Notification will appear in the bottom right corner of your window when there is an incoming Zoom call.

- If multiple records matching the phone number exist, the record with the most recent activity will appear.
- If the phone number is found on both Names and Companies, the Company record will be favored in the pop-up.



Clicking on the notification will launch a window with the matching records.



- The top three will be shown (in order of most recent activity).
- The ‘More Records’ option will show additional items up to a maximum of 50 per record type.

- The << icon will collapse the sidebar to increase screen space if needed.
- If no records match, the option to add a new record will be presented.

Activities

When dialing out of PCR, an Activity window will pop up to prompt the user to take notes or record their calls. This is where you'll mark down the type of call and the content discussed. These Activities are manually generated and separate from the automatic ones written by the Zoom integration.

The integration will log Activities for all voice communications made through your Zoom account.

Please note that this will only work in **one database at a time**. If a user has accounts in more than one PCR database it will only write Activities for the most recently authenticated database.

- Activity Type: INBOUND
  - Result Codes: MISSED, RECEIVED, VOICEMAIL
- Activity Type: OUTBOUND
  - Result Codes: CONNECTED, NO CONNECT

Activities are created on a periodic sync with Zoom’s servers and may not appear in your database immediately. If you experience continued issues please reauthenticate your Zoom credentials or reach out to support for assistance.