

Mitel Phone System Integration (PSI) with Zoom

User Guide 06/2025



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1 Changes in current issue	4
2 Overview	5
3 Zoom client. 3.1 Signing in. 3.2 Main interface. 3.3 Signing out.	
 4 Calls	10 10 10 11 11 11 11 11 11 11 11 11 11 11 11 11 11 11 11 11 11 11 12 13 14 15 15 15 15 15 15 15 15 15 15 15 15 15 15 15 15 15 16 17 17 17 17 18 18 18 17 17 17 18
5 Access codes 5.1 Enabling features via access code	21 21
6 Call history 6.1 Deleting a call history entry	22 22
7 Voicemail 7.1 Listening to voice messages	23
8 Presence status	24

1 Changes in current issue

Date	Issue no.	Change description	Chapters
June 2025	08	Changed navigation path for Hide incoming calls configuration Added restrictions for the call forwarding banner	Disabling call waiting on page 18 Forwarding calls on page 18
June 2025	07	Removed <i>prerequisites</i> chapter, updates after review throughout the document.	-
June 2025	06	Added note regarding DND status	Presence status on page 24
May 2025	05	Removed DND, Call Forward access codes. New chapter for call forwarding. Updates on Presence status	Forwarding calls on page 18 Access codes on page 21 Presence status on page 24
Apr 2025	04	Added feature limitations for MiVoice Business	Access codes on page 21 Switching to a video call (Meet) on page 17
Apr 2025	03	Document metadata, added MiVoice Business in supported PBXs	Prerequisites Presence status on page 24 Feature set on page 5
Mar 2025	02	-	-
Feb 2025	01	Document creation	-

2 Overview

This guide describes how to use the **phone capabilities** of the Zoom Phone System Integration (PSI).

The document contains specific information for call handling, such as answering and transferring calls.

It **does not** provide information on how to use other functions of the Zoom, such as the **Team Chat**, **Docs** etc.

If a particular function on Zoom is not available, this may be due to one of the following reasons:

- The function is not configured for your user, in which case please contact the system administrator.
- The communication system you are using does not support this function. In this case, please contact your sales partner for information.

2.1 Feature set

Zoom is a desktop and mobile app that can be used with the following communication systems:

- Unify OpenScape Voice
- Unify OpenScape 4000
- MiVoice Business

It allows you to make and receive phone calls using the Zoom client.

With Zoom you can easily:

- Make calls and receive calls
- Answer, decline or end a call
- · Place calls on hold and retrieve them
- · Access to your voicemail
- Transfer calls (warm transfer, blind transfer)
- Manage call waiting
- Forward calls
- Handle multiple calls (up to 3 calls on hold)
- Host a 3-party local conference
- Send DTMF commands during a call
- Use access codes for specific actions (i.e. call forwarding)
- Add calls (alternate between calls, merge calls to a conference)
- · Merge two calls into a conference
- Make emergency calls (NG911 compliance)
- See the presence status of Zoom users
- Escalate audio-only call to meeting (video call)
- Contacts directory sync (Corporate, External, Personal)
- Single Sign On (SSO) login to Zoom workplace
- · Voicemail indication, voicemail speed dial
- Set Do Not Disturb (DND) to avoid receiving calls
- · Call history

2.2 Supported platforms

You can use Zoom on the following OS / platforms:

- Windows Desktop
- Mac PC
- Android mobile devices
- iOS devices

3 Zoom client

3.1 Signing in

Step by Step

- 1) Open the Zoom client on your device.
- 2) Type your email in the Enter your email text box.
- Type your password in the Enter your password text box. You can select the Keep me signed in option, to store your credentials.
- 4) Click Sign in.

NOTICE: The first time you sign in, a verification code is sent to the email address of your Zoom account. If you are already logged in to another device, an authentication request will be send to that device.

3.2 Main interface

The Zoom main user interface consists of three main sections.

Zoom client

Section	Description
A	Navigation menu/bar - Displays different menus and options available.
	 Back and Forward arrows to navigate between windows History button to switch between different tabs Search box (Ctrl + E) Phone tab
	NOTICE: This guide only covers the Phone tab and does not provide details on other tabs.
	Help menu
	Activity center Calendar papel
	User settings
	Window operations (Minimize, Resize, Close)
В	Call history - When Phone is selected, it displays the call history.
	The following options are available when an entry on the call history menu is selected:
	Call the number
	 Create a new contact with the number Add the number to an existing contact
	Chat with the contact
	Delete the call history entry
C	Main display area - Displays information related to call handling and basic call functions, such as:
	Answer an incoming call Mute/upmute your microphone
	Add call
	Start a meeting
	 Open the keypad Place a call on hold
	Minimize the window
	Transfer a call
	 End a call Access voicemail
	• NOTICE: If Zoom/CloudLink is connected
	to an Emergency Service Provider, the following message appears "Emergency location detected " at the top right. Otherwise, you will see be prompted to contact your telephony system administrator.

3.3 Signing out

To sign out on your Zoom client:

- 1) Click on the avatar, at the top right of the app.
- 2) Select Sign out from the drop-down menu.

4 Calls

Via the Zoom client you can make and receive phone calls, view and control your current calls.

You can make or receive up to four calls at a time, via a single client (desktop or mobile). Only one call can be active at a time, while other calls can be either incoming, or on hold.

4.1 Making a call

4.1.1 Making a call from the keypad

2 3 DEF ABC 6 5 4 GHI MNO 7 8 9 PQRS WXY7 TUV # Caller ID: 302103332044

Enter a name or number...

- 1) Open Zoom client.
- 2) Click on the Phone tab.

- 3) Make a call in one of the following ways:
 - a) Use the on-screen keypad or device dial to enter a number, then click the dial button.
 - b) Start typing a name or a phone number to search your contacts.
 - Use the up/down arrows to select a contact and press Enter on your keyboard.
 - Use your mouse to hover over a contact and click to call.

4.1.2 Making a call from the call history

Step by Step

- 1) Right click on a **call history** entry on the left hand side of the phone tab.
- 2) Click Dial.
- 3) Alternatively you can]double click a call history entry to dial it.

4.1.3 Making a second call

You can make a new call, while already in a call.

Step by Step

- 1) In the active call screen click **Minimize**.
 - The keypad appears while the active call view is minimized.
- 2) Enter the name or number you want to call. The initial call is placed on hold.
- 3) You can choose to swap or merge calls (see Add call on page 15).

4.2 Receiving a call

When receiving a call, you will see an incoming call alert on your display and you will hear an audio notification.

You can select answer, decline, or decline the call and send a message to the caller (only available when the caller is a Zoom user).

INFO: You can click and drag the incoming call window.



Procedure

- To answer the call, click Accept.
- To decline the call, click **Decline**.
- To decline the call and send a message to the caller, click on the **Decline** with message... field and select one of the predefined messages from the drop-down list.

The call stops ringing and the user receives a chat notification with your message.

4.2.1 Receiving a call whilst on an active call

When you receive a call, while you are on an active call, you will see an incoming call alert on your display and you will hear an audible notification.



You can choose any of the following options:

Procedure

- Hold & Accept: Places the current call on hold and accepts the new call.
- **Decline**: Declines the incoming call.
- **Decline with message**: Declines the incoming call with an option to send a chat message to the caller.
- End & Accept: Ends the current call and accepts the new call.

4.3 Actions during an active call

While on an active call, the name and number of the caller is displayed, the duration of the call, and available call control.



The following table summarizes the call controls and their functions.

Action	Description
Mute / Unmute	Mute or unmute your microphone
Keypad	Open a keypad to call a number or enter DTMF (dual tone multi-frequency) digits
Audio	Open the audio settings
Add call SwapMerge	Allows you to make another call and places the active call on hold. You can choose to either swap (alternate) calls, or merge calls to create a conference
Hold / Unhold	Place the call on hold or retrieve the call
TransferWarm transferDirect transfer	Allows you type a number and choose to either, talk to the recipient before transferring the call (consultation transfer) or transfer the call directly (blind transfer)
Meet	Switches to a audio/video meeting, while placing the call on hold
Minimize	Minimize the active call window
End call	End the call

4.3.1 Muting/Unmuting your microphone

While on an active call, you can choose to mute / unmute your microphone.

- 1) To mute your microphone, click Mute.
- 2) To umute your microphone, click Unmute.

4.3.2 Sending DTMF on an active call

During an active call, you can send Dual-Tone Multi-Frequency (DTMF) commands.

Step by Step

- 1) Click Keypad.
- 2) Use the on-screen keypad or the keyboard to enter DTMF.
- 3) Click Hide keypad to return to the active call.

4.3.3 Editing your audio settings

During an active call, you can edit your audio settings.

Step by Step

- 1) Click Audio.
 - The **Settings** windows opens at the **Audio** tab.
- 2) Make any necessary changes and click Close at the top right of the window.

4.3.4 Add call

During an active call, you can add a call and either swap between them or merge the two calls in a conference.

4.3.4.1 Merging two calls

When you are on two calls at the same time, you can merge them into a conference.

Step by Step

- 1) Click Add call.
- 2) Enter the name or number of the new participant. As you type, a list of suggested contacts is displayed. Once the new caller is selected, your current call is placed on hold.

3) Click Merge call.

- The calls are merged into a conference call.
- 4) To end the call, click Hang up > End call for everyone. All call participants are disconnected from the call.
- 5) Alternatively, to leave the call, click Hang up > Leave the call. Only you are disconnected from the call, while the remaining participants stay connected.

4.3.4.2 Swapping between two calls

You can swap between an active call and a call on hold. When you do this, the active call is placed on hold and the call on hold becomes the active call.

When you are on two calls at the same time, you can swap between them.

Step by Step

- 1) Click Add call.
- 2) Enter the name or number you want to transfer the call to. As you type, a list of suggested contacts is displayed. Once the new caller is selected, your current call is placed on hold.
- To return to the call on hold click On hold Click to Swap. You return to the previous call, placing on hold the other call.

4.3.5 Placing a call on hold

While on an active call, you can place the call on hold so that you can perform another task such as making or answering another call.

Step by Step

- 1) To place a call on hold, click Hold.
 - The other party will be placed on hold and hear music, until you retrieve or transfer the call.
- 2) To return to the call, click Unhold.

4.3.6 Transferring a call

You can transfer an active call to another person with or without consultation.

4.3.6.1 Transferring a call with consultation (Warm transfer)

While on an active call:

Step by Step

- 1) Click Add call.
- 2) Enter the name or number you want to transfer the call to.

As you type, a list of suggested contacts is displayed.

3) Select a contact and click **Warm transfer** speak to the new user before transferring.

The first call is placed on hold so you can talk with the new user.

- If needed, you can return to the previous call by clicking On hold Click to Swap. You can also click Cancel transfer to cancel transferring the call.
- 5) Click **Complete transfer** to transfer the call. The call is transferred and you are disconnected from the call.

4.3.6.2 Transferring a call without consultation (Direct transfer)

You can transfer a call to another user directly, without speaking to them first.

While on an active call:

Step by Step

- 1) Click Transfer.
- Enter the name or number you want to transfer the call to. As you type, a list of suggested contacts is displayed.
- Select the contact you want to transfer the call and click Direct transfer without speaking to the new user.
 The call is transferred and you are disconnected from the call.

The call is transferred and you are disconnected from the call.

4.3.7 Switching to a video call (Meet)

While on an active call you can switch to a video call with the user. This option is available only to Zoom users. This feature is not supported for MiVB integrations.

Step by Step

1) Click Meet.

A pop-up window **You have a phone call in progress** appears. It informs you that the current call will be placed on hold and the audio will be switched to the meeting.

- 2) Click Continue. The meeting window appears. The first time you join a meeting you will be asked to join with computer audio.
- 3) Click Join with computer audio. You can always do so, by enabling the Automatically join audio by computer when joining check box.
- 4) Once the other user clicks Join, you will be connected to a video call.
- 5) You can end the meeting by clicking End and choosing to either End meeting for all or Leave meeting > Assign and Leave (if you are the host of the meeting).

4.3.8 Handing off a call to another device

You can hand off an active call from one device to another. For example, you can move the call from your desktop app to your mobile app.

Note that a blind transfer to another of the Zoom user is not a seamless handover. When invoking a transfer, the caller will hear ringing as the transferred-to destination rings.

NOTICE: Handing off calls to other devices is not available for OpenScape 4000.

Prerequisites

- You are in an active call on one of your devices (e.g. desktop app).
- You are logged in with the same user in both applications.

To hand over an active call to your mobile device:

Step by Step

- 1) Click Transfer.
- Call your own phone number and click Direct transfer. While the call is being transferred, it remains in a ringing state until answered.
- On your mobile app, click Answer to answer the call. The transfer is complete and the call is handed over to your mobile device.

NOTICE: Alternatively, you park the call on one device and retrieve on another. Park feature should be available and configured for the users by the system administrator.

4.3.9 Disabling call waiting

Step by Step

- 1) Click on your Avatar > Settings > Notifications & sounds (Desktop app).
- 2) Enable the Hide incoming calls while on a call checkbox.

NOTICE: If you are calling a user that has enabled the **Hide incoming calls while on a call** feature, you will see an indication that the calling party is busy.

You will now only receive one call at a time.

4.4 Forwarding calls

You can configure call forwarding using the user menu. To open the user menu click on your avatar image at the top right of the Zoom client, and then click **Forward calls**.

Upon successful configuration a banner/notification will appear at the main window, to inform the user that call forwarding is activated. The banner only appears for the **Always forwarding** method, including **Internal/External** callers, for this method.

NOTICE: Some PBX - Zoom integrations can have a different feature set. For example: Always forwarding from internal and external callers is not supported by MiVB. Similarly, Forward

Busy from internal and external callers and Forward No Answer from internal and external callers are not supported by OS4K. The screenshot below is from a Zoom - OSV integration. Other PBXs can have a slightly different user interface.

a Zoom Workplace				×
Select a met	hod t	to forwa	ard calls	
Always forwarding				
manual	~			
manual	~	Internal	Input number	
manual	~	External	Input number	
Forward when busy				
manual	~	Input numb	er	
manual	~	Internal	02103331018	×
manual	~	External	02103331019	×
Forward when no ar	ıswer			
manual	~	Input numb	er	
manual	~	Internal	02103331018	×
manual	~	External	02103331019	×
			Canc	el Save

Call forwarding methods

The available options for call forwarding are the following:

- Always forwarding: unconditional all calls are forwarded.
- Forward when busy: when you are busy in a call, forward incoming calls.
- Forward when no answer: if you do not answer the call within a predefined time (i.e. 24 seconds) the call is forwarded.

• For each of the above methods, you can set a different number for **Internal** and/or **External** callers.

To configure one of the above options:

- **1)** Click to enable the radio button, below the call forwarding type of your choosing.
- **2)** If available, choose a PBX-based entry from the **manual** drop-down menu, to automatically set the forwarding destination.
- 3) Type the number/destination to forward all callers in the Input number field.
- **4)** If you haven't set a number/destination to forward all callers (step 3), you can set a call forwarding destination only for **Internal** and/or **External** callers.
- 5) Click Save.

5 Access codes

Access codes allow the user to quickly set-up alternate numbers for call forwarding and other actions.

Access code prefixes can be configured via the communication systems (i.e. OpenScape Voice). Please contact the administrator of the system to provide the relevant codes.

The following access codes functions are available for configuration:

Call back (Call back access codes are not available for OpenScape 4000)

- Call back busy When the party you are calling is Busy, enter the Call back access code and the system will automatically call you back when the user is free
- Call back no reply If the calling party does not answer the call, the caller can enter the Call back access code and the system will automatically call you back

Additional features

- · Activate/Deactivate Call Forwarding Voice Mail
- Activate/Deactivate Outgoing CID Suppression
- Caller Identity Suppression Per Call
- Activate/Deactivate Anonymous Caller Rejection (not available for MiVB)
- Activate/Deactivate Call Completion Service (CCBS or CCNR) (not available for MiVB)
- Call Park to Server/ Call Park Retrieve from Server
- Directed Call Pickup

5.1 Enabling features via access code

To enable features via access codes, you need to dial the specific access code, i.e. forward all calls, along with the phone number.

NOTICE: Your system administrator should provide an access code list, as each system may have different access codes to activate/deactivate features.

- 1) *40 which is the default code for forwarding all calls, followed by the number to receive those calls, for example 30210691800.
- 2) Click Dial to complete the request (*4030210691800).
 A system message is received, that the feature is active. Received calls while call forwarding is activated appear as missed calls in call history.
- 3) To disable the feature dial #40.

6 Call history

Call history displays a list of all your incoming, missed and outgoing calls. You can use it to call your contacts or to respond to a missed call.

To view the call history, select Phone from the navigation menu/bar.

Identifying calls

The call history shows different type of call entries:

- Missed / Unanswered Call (displayed in red)
- Incoming Answered Call
- Outgoing Call

They can be identified using the symbols at the top-right of each entry.

Call details

Call history also displays the following:

- · Avatar/picture of the caller/ callee
- Phone number of the caller/ callee
- Name of the caller/ callee (when it can be resolved e.g. from contacts)
- Date and time of the call

6.1 Deleting a call history entry

To delete a call history entry:

Step by Step

- 1) Select Phone from the navigation menu of the app.
- 2) Hover over the entry and right-click to open the context menu.
- 3) Click Delete.

NOTICE: Proceed with caution as no confirmation box is presented.

The call is removed from call history.

7 Voicemail

7.1 Listening to voice messages

Voicemail functionality has to be configured by the phone system administrator.

The voicemail icon ∞ appears on the right hand side of your Zoom client. A red dot indicates a new voice message.

To listen to your voice messages:

- Click the voicemail icon [∞]. The voicemail number is called.
- **2)** Follow the prompts of the automated system to listen/manage your voicemail messages.
- 3) End the call by clicking •.

8 Presence status

Currently, the presence status is based on your Zoom status and does not include the status of the telephone systems (OpenScape Voice, OpenScape 4000, MiVoice Business).

The different presence statuses are described in the following table:

Presence / Availability status	Description	
Available	You are online and available to contact.	
Busy / On a call	You are online and on a call.	
Do not disturb	You do not want to be disrupted. Select one of the available options (20m, 1h, 2h, 4h, 8h, 24h) or set a custom time period for the status to end.	
	This status is server-based and when enabled you will not receive incoming calls to your devices or zoom client.	
	NOTICE: Currently, DND is automatically deactivated from client side when the user logs out. Upon login, Zoom PSI client enables DND again, if it was enabled before logout.	
Away	You are currently away from your device.	
Out of office	You are offline or logged out of the app.	

8.1 Setting your presence status

You can see your presence status in the top-right corner of the Zoom client, on the top-right corner of your avatar image.

To set your presence status:

- 1) Click on your avatar at the top-right of the app.
- 2) Hover over the current presence status and click to select one of the available options.
- **3)** Your new presence status will be displayed to other users and be updated in the top right corner of your avatar.

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