



A MITEL
PRODUCT
GUIDE

Mitel Phone System Integration (PSI) with Zoom

User Guide

04/2025

Notices

The information contained in this document is believed to be accurate in all respects but is not warranted by Mitel Europe Limited. The information is subject to change without notice and should not be construed in any way as a commitment by Mitel or any of its affiliates or subsidiaries. Mitel and its affiliates and subsidiaries assume no responsibility for any errors or omissions in this document. Revisions of this document or new editions of it may be issued to incorporate such changes. No part of this document can be reproduced or transmitted in any form or by any means - electronic or mechanical - for any purpose without written permission from Mitel Networks Corporation.

Trademarks

The trademarks, service marks, logos, and graphics (collectively "Trademarks") appearing on Mitel's Internet sites or in its publications are registered and unregistered trademarks of Mitel Networks Corporation (MNC) or its subsidiaries (collectively "Mitel), Unify Software and Solutions GmbH & Co. KG or its affiliates (collectively "Unify") or others. Use of the Trademarks is prohibited without the express consent from Mitel and/or Unify. Please contact our legal department at iplegal@mitel.com for additional information. For a list of the worldwide Mitel and Unify registered trademarks, please refer to the website: <http://www.mitel.com/trademarks>.

© Copyright 2025, Mitel Networks Corporation

All rights reserved

Contents

| | |
|---|-----------|
| 1 Changes in current issue..... | 4 |
| 2 Overview..... | 5 |
| 2.1 Feature set..... | 5 |
| 2.2 Prerequisites..... | 6 |
| 2.3 Supported platforms..... | 6 |
| 3 Zoom app..... | 7 |
| 3.1 Signing in..... | 7 |
| 3.2 Main interface..... | 7 |
| 3.3 Signing out..... | 9 |
| 4 Calls..... | 10 |
| 4.1 Making a call..... | 10 |
| 4.1.1 Making a call from the keypad..... | 10 |
| 4.1.2 Making a call from the call history..... | 11 |
| 4.1.3 Making a second parallel call..... | 11 |
| 4.2 Receiving a call..... | 11 |
| 4.2.1 Receiving a call during another active call..... | 12 |
| 4.3 Actions during an active call..... | 13 |
| 4.3.1 Muting/Unmuting your microphone..... | 14 |
| 4.3.2 Sending DTMF commands on an active call..... | 15 |
| 4.3.3 Opening your audio settings..... | 15 |
| 4.3.4 Add call..... | 15 |
| 4.3.4.1 Merging two parallel calls..... | 15 |
| 4.3.4.2 Swapping between two parallel calls..... | 16 |
| 4.3.5 Placing a call on hold..... | 16 |
| 4.3.6 Transferring a call..... | 16 |
| 4.3.6.1 Transferring a call with consultation (Warm transfer)..... | 16 |
| 4.3.6.2 Transferring a call without consultation (Direct transfer)..... | 17 |
| 4.3.7 Switching to a video call (Meet)..... | 17 |
| 4.3.8 Handing over an ongoing call to another device..... | 17 |
| 4.3.9 Disabling call waiting (Do not received multiple calls)..... | 18 |
| 5 Access codes..... | 19 |
| 5.1 Enabling access codes..... | 19 |
| 6 Call history..... | 21 |
| 6.1 Deleting a call history entry..... | 21 |
| 7 Voicemail..... | 22 |
| 7.1 Listening to voice messages..... | 22 |
| 8 Presence status..... | 23 |
| 8.1 Setting your presence status..... | 23 |

1 Changes in current issue

| Date | Issue no. | Change description | Chapters |
|-------------|-----------|---|--|
| 29 Apr 2025 | 04 | Added feature limitations for MiVoice Business | Access codes on page 19 Switching to a video call (Meet) on page 17 |
| 3 Apr 2025 | 03 | Document metadata, added MiVoice Business in supported PBXs | Prerequisites on page 6 Presence status on page 23 Feature set on page 5 |
| 20 Mar 2025 | 02 | - | - |
| 20 Feb 2025 | 01 | Document creation | - |

2 Overview

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

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

It **does not** provide information on how to operate all of the various functions of the Zoom, such as the **Team Chat** or the **Docs** sections.

If a particular function on Zoom is not available to you as described, 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 on how to upgrade.

2.1 Feature set

Zoom is a desktop and mobile app working with the following communication systems:

- Unify OpenScape Voice
- Unify OpenScape 4000
- MiVoice Business

It allows you to make and receive phone calls on your business phone number 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 Prerequisites

Prerequisites for using Zoom app

- You have an active OpenScape Voice, OpenScape 4000, or MiVoice Business user account
- The user is provisioned as a Zoom user
- The communication system is integrated with Zoom
- You have acquired a Zoom tenant license

2.3 Supported platforms

You can use Zoom on the following OS / platforms:

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

3 Zoom app

3.1 Signing in

Step by Step

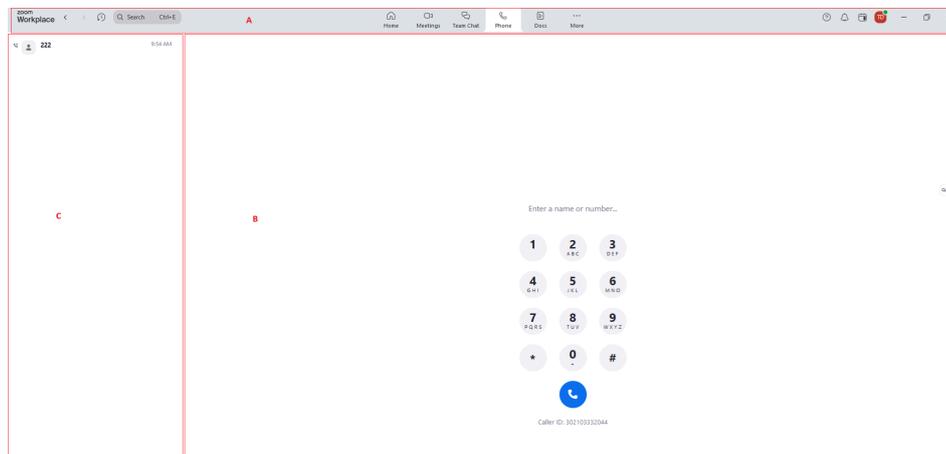
- 1) Run Zoom application on your device.
- 2) Type your email in the **Enter your email** text box.
- 3) Type your password in the **Enter your password** text box.
You can select the **Keep me signed in** option, to store your credentials.
- 4) Click **Sign in**.

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

You are logged in.

3.2 Main interface

The Zoom main user interface consists of three main sections.



| Section | Description |
|---------|--|
| A | <p>Navigation menu/bar - Displays different menus and options available.</p> <ul style="list-style-type: none"> • Back and Forward arrows to navigate between windows • History button to switch between different tabs • Search box (Ctrl + E) • Phone tab <hr/> <p style="text-align: center;">NOTICE: This guide only covers the Phone tab and does not provide details on other tabs.</p> <hr/> <ul style="list-style-type: none"> • Help menu • Activity center • Calendar panel • User settings • Window operations (Minimize, Resize, Close) |
| B | <p>Call history - When in the Phone tab, displays the call history.</p> <p>The following options are available on the call history menu:</p> <ul style="list-style-type: none"> • 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 | <p>Main display area - Displays information related to call handling and basic call functions, such as:</p> <ul style="list-style-type: none"> • Answer an incoming call • Mute/unmute 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 • <hr/> <p style="text-align: center;">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.</p> <hr/> |

3.3 Signing out

To sign out at any time:

Step by Step

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

Calls

Making a call

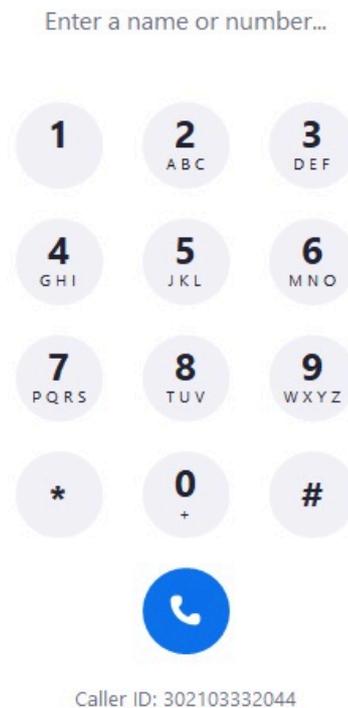
4 Calls

With Zoom you can make and receive phone calls, view your current calls and manage them as you need.

You can make or receive up to four calls at a time, all on the same 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



Step by Step

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

- 3) Make a call in one of the following ways:
 - a) Use the on-screen keypad or device numpad to enter a number, then click the dial button.
 - b) Start typing a name or a phone number to retrieve a list of related 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) Click **History** on the left menu of the Zoom app.
- 2) Hover over a call history entry and right-click to open the context menu.
- 3) Click **Dial**.
- 4) Alternatively you can hover over and double click a call history entry to dial it.

4.1.3 Making a second parallel call

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

Step by Step

- 1) Click **Minimize**.

The keypad appears while the current call view is minimized under the navigation menu/bar of the interface.
- 2) Enter the name or number you want to call.

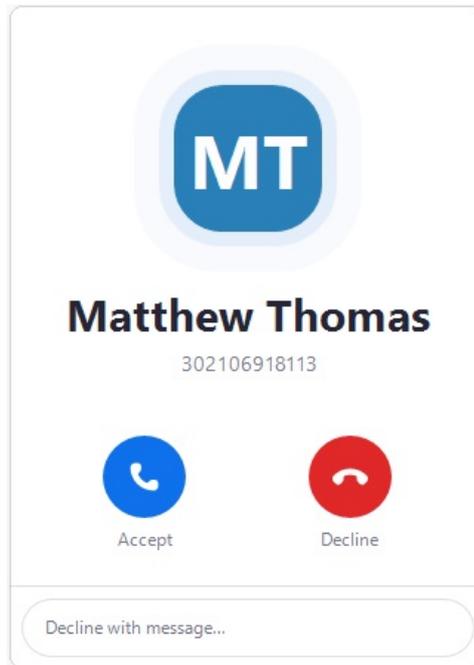
The initial call is placed on hold.
- 3) You can choose to swap or merge calls (see [Add call](#) on page 15).

4.2 Receiving a call

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

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

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

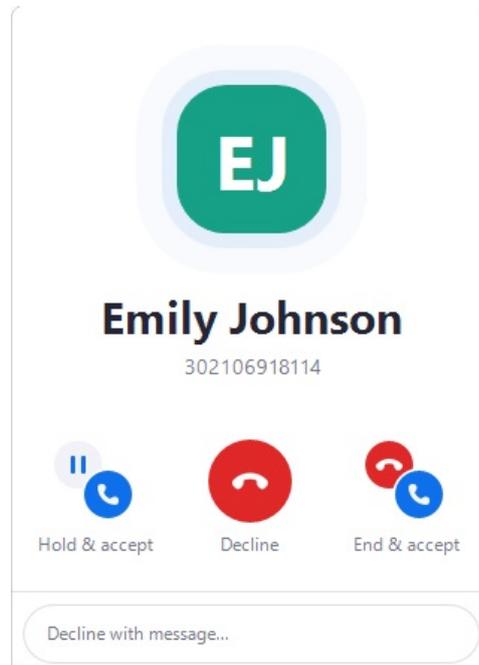


Procedure

- 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 during another active call

When a call comes in, while you are engaged in an active call, you will see an incoming call alert on your display and you will hear an audio notification.



You can choose any of the following options:

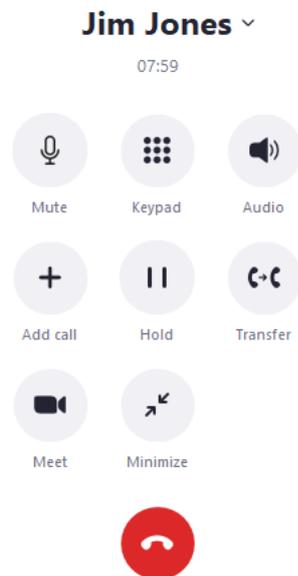
Procedure

- **Hold & Accept:** Places the current call on hold and accepts the new call.
- **Decline** and **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, you can see the name or number of the person you are on a call with on the call screen, the duration of the call, and a set of call controls.

Calls



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 <ul style="list-style-type: none">• Swap• Merge | Allows you to type a number and places the current call on hold. You can choose to either swap (alternate) calls, or merge calls to a local conference |
| Hold / Unhold | Place the call on hold or retrieve the call |
| Transfer <ul style="list-style-type: none">• Warm transfer• Direct 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 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.

Step by Step

- 1) To mute your microphone, click **Mute** on the call controls.
No audio is transmitted to the other party.
- 2) To unmute your microphone, click **Unmute** on the call controls.

4.3.2 Sending DTMF commands on an active call

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

Step by Step

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

4.3.3 Opening your audio settings

During an active call, if needed, you can access 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 another call and either alternate between them or merge the two calls in a conference.

4.3.4.1 Merging two parallel 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 you want to transfer the call to.
As you type in, a list of suggested contacts is displayed. 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 parallel calls

You can swap between an active call and a call on hold. When you do this, the currently 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 alternate 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 in, a list of suggested contacts is displayed. Your current call is placed on hold.
- 3) 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** on the call controls.
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)

You can complete a call transfer during ringing, without waiting for the other party to answer.

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 in, 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.

- 4) 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 person without speaking to them first.

While on an active call:

Step by Step

- 1) Click **Transfer**.
- 2) Enter the name or number you want to transfer the call to.
As you type in, a list of suggested contacts is displayed.
- 3) 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.

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 user clicks to **Accept** and **Join** the meeting, 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 over an ongoing call to another device

You can move an active call from the device on which you answered the call to another device. For example, you can move the call from your desktop app to your mobile app.

Note that a blind transfer to another device of the Zoom user is different from a seamless handover. In a blind transfer, the caller will hear ringing for a while as the transferred-to destination rings, whereas in a seamless handover, there is no interruption to the conversation.

NOTICE: This option is not available for OpenScape 4000.

Prerequisites

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

To hand over an active call to your mobile device:

Step by Step

- 1) Click **Transfer**.
- 2) *Call your own phone number* and click **Direct transfer**.
While the call is being transferred, it remains in a ringing state until answered.
- 3) 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 administration.

4.3.9 Disabling call waiting (Do not received multiple calls)

Step by Step

- 1) Click on **Settings > Phone**
- 2) Enable the **Hide incoming calls while on a call** checkbox.

NOTICE: If you are calling a user that has disabled call waiting disabled, you will see an indication that the calling party is busy.

You can receive only one call at a time.

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 forwarding

- Call forwarding unconditional - all calls are forwarded
- Call forwarding no reply - if you do not answer the call within a predefined time (i.e. 20 seconds) the call is forwarded
- Call forwarding busy - when you are busy in a call, forward incoming calls

Do not disturb

- Do not disturb - You do not receive any calls. This is not to be confused with the **Do not disturb** presence status of the user

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

- Call back busy - When the party you are calling is Busy, you can leave a call back for the system to perform automatically
- Call back no reply - If the calling party do not answer the call, the caller can leave a call back for the system to perform automatically

Additional features

- Call back busy - when you are busy in a call, the caller can leave a call back for the system to perform automatically
- Call back no reply - if you do not answer the call within a predefined time (i.e. 20 seconds), the caller can leave a call back for the system to perform automatically
- 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 access codes

To enable access codes, dial a specific access code, i.e. forward all calls, along with the phone number intended.

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

Access codes

Step by Step

- 1) Use the * key and *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 call the complete number *4030210691800.
A system message is received, that the feature is active. Received calls while call forwarding is activated appear as missed in call history.
- 3) To disable the feature **#40** is required. You should not add the number after the access code. For example #40.

6 Call history

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

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

Identification of calls

The call history shows different type of call entries:

- incoming missed/not answered call
- incoming answered call
- outgoing call

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

Call details

Further information about calls can be found in the call history:

- 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 **History** from the navigation menu of the app.
- 2) Hover over the entry and right-click to open the context menu.
- 3) Click **Delete**.
The call is removed from call history.

Voicemail

Listening to voice messages

7 Voicemail

7.1 Listening to voice messages

Voicemail functionality has to be configured by the admin of the communication system in order to be available.

The voicemail icon  appears at the end right of your Zoom app. A red dot on the icon indicates a new voice message.

To listen to your voice messages:

Step by Step

- 1) Click the voicemail icon  at the Zoom main window.
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 retrieved from Zoom, rather than the communication 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. Any incoming calls will be silent. You have to 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 does not prevent the user from receiving calls. You should activate the DND feature using access code to avoid receiving calls. |
| 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 app, on the top-right corner of your avatar image.

To set your presence status:

Step by Step

- 1) Click on your profile picture at the top right of the app.
- 2) Hover over the current presence status and click to select one of the available options.

