A MITEL
PRODUCT
GUIDE

Zoom Phone with MiVoice Business and MiVoice Border Gateway

Phone System Integration (PSI) Solution Guide

August 2025

Mitel
Powering connections

Contents

History of Changes 1

Version	Date	Change
1.0	31-March-2025	The first issue of the guide
1.1	06-May-2025	Updated and enhanced the following sections: • Prerequisites • Integrating Zoom with CloudLink • Viewing the Event History table (Zoom integration) • Licensing
1.2	09-June-2025	Added the following section: • Adding Zoom integration to a customer account • Setting up a CloudLink account in Zoom Marketplace • Troubleshooting subscription-related errors
1.3	12-August-2025	Added the following section: • Managing Zoom Services for MiCollab Users Removed the following section: • *Setting up a CloudLink account in Zoom Marketplace*

Introduction 2

This chapter contains the following sections:

- Target audience
- Prerequisites

This document outlines how to connect the MiVoice Business (MiVB) and MiVoice Border Gateway (MBG) to Zoom.

Zoom is a cloud-based phone system that provides voice communication features such as call management, call forwarding, voicemail, and integration with Zoom Meetings. The Zoom - Mitel Phone System Integration (PSI) solution offers a hybrid communication model that enables users to maintain the telecom functions with their MiVoice Business system while extending its functionality with Zoom's cloud-based features.

This integration allows Zoom's Phone tab to become a SIP Softphone that registers to the Mitel Calling Platform, utilizing the MiVoice Border Gateway. The MiVoice Border Gateway acts as a secure connection between your on-premises Mitel PBX and Zoom Workplace clients. This allows various Zoom PSI endpoints - including desktop clients, mobile devices, and desk phones - to connect directly to your Mitel system via SIP registration.

The Zoom-Mitel PSI integration requires all key components to be properly configured within the user environment. This guide provides the essential setup steps to establish secure, reliable communication paths that will enhance your organization's collaboration capabilities.

2.1 Target audience

This document is intended for professionals involved in configuring and managing the Zoom-MiVB-MBG integration, specifically those working with MiVoice Business (MiVB) and MiVoice Border Gateway (MBG) components. The target audience includes implementation engineers, field technicians, system administrators, business partners, solution providers, and customers directly involved in the deployment and management of the integration.

2.2 Prerequisites

Supported product versions

Product	SW Version (minimum)
Zoom Workplace Client	6.4.1 or greater
MiVoice Business with active SWA (Mitel Software Assurance)	10.3.0.16

Product	SW Version (minimum)
MiVoice Border Gateway	12.2.0.72

System Requirements

- **Zoom**

  - Zoom Phone initial setup is completed. See the How to Complete Initial Setup section in Zoom Phone initial setup.
  - Automatic Phone assignment for Zoom Workplace Licences is disabled. For more information, refer to Configuring automatic Zoom Phone activation.
  - Zoom Phone External Contacts setup for any non-Zoom, Mitel users is completed.
  - When logged in to the Zoom web portal as an Admin with the privilege to edit account settings, the Phone System Integration tab should appear under Account Management. If it does not, please contact Zoom.
  - For any additional requirements, refer to the Zoom-Mitel Phone System Integration support page

2.2.1 User Roles and Permissions

- **Mitel Administration**

  To set up the CloudLink and Zoom integration, you must be a CloudLink account admin. This role is assigned to a user by a Mitel Partner or by an Account Admin.

  Account Admins can:

  - Add, edit, or delete users (including other Account Admins).
  - Enable or disable administrative rights for users.
  - Configure the integration and connect the on-premise software to CloudLink.

  Regular CloudLink users cannot perform this setup. For more information, refer to the Mitel Administration User Guide.

Note:

A Zoom admin does not need to be a CloudLink admin, unless they also need to manage CloudLink settings.

End users authenticate through Zoom and do not interact with CloudLink directly. They will not see or manage CloudLink settings.

After the initial setup, the integration operates using **service accounts**, ensuring continued functionality without requiring individual admin access.

- **Zoom**
  - Zoom Account, Business or Enterprise.
  - Account Owner or Admin with a Role for managing Users, Phone System Integration, and Zoom Phone.

  To manage users, Phone System integrations and maintain a stable and functional integration, you must create and use a dedicated **Admin user** (service account) with a unique email address on your Zoom site specifically for the integration. This account must remain active and should not be deactivated.

  Do not use a regular user account, as deactivating it (e.g., if the user leaves) will cause connection failure.

  For more information, refer to Managing users.

2.2.2 Network requirements

Zoom Workplace

The Zoom Workplace app uses the standard Firewall ports and IP ranges. To add the required Firewall rules, refer to the **Zoom firewall rules** and **Firewall rules for Zoom website** sections in the Zoom network firewall or proxy server settings page.

Zoom PSI

Firewall rules for incoming traffic:

When the Client is on the Internet, the following incoming traffic must be allowed for the Zoom PSI client:

- SIP over TLS (TCP port 5061): The Zoom PSI client, like any other SIP remote client, must be able to connect to the external firewall of the MBG, which is located in the DMZ. It should be able to connect to the SIP/TLS port of the access interface of MBG via the external firewall. The default port value is `5061`.
- SRTP media traffic (UDP): SRTP packets should be forwarded to the access interface of the SBC, based on the configured port range of the MBG.

Firewall rules for outgoing traffic:

When the Client is on-premise, the following outgoing traffic must be allowed for the Zoom PSI client:

- DNS (UDP/TCP port 53): PSI client needs to resolve the FQDN of the external firewall of the MBG using DNS.
- SIP over TLS (TCP port 5061): PSI client must be connected to the external firewall of the MBG using the SIP/TLS. The default value is `5061`.
- SRTP media traffic (UDP) : SRTP must be allowed to reach the external firewall of the MBG, based on the configured port range of the MBG.

Overview 3

This chapter contains the following sections:

This chapter provides an overview of the integration solution, detailing the key components, actions, and configurations necessary for phone system integration. It also outlines how the Zoom, MBG, and MiVB configurations interact with each other and other critical components of the solution.

3.1 Key Components

The key components of the Zoom-MBG-MiVB phone system integration solution are as follows:

- **Zoom Web Portal**: Allows you to customize your profile and configure your Zoom settings. When setting up your Zoom-MiVB integration, you are granted admin access to the Zoom web portal.
- **MiVoice Business (MiVB)**: MiVoice Business is a scalable SIP-based IP system that provides enterprise-class communications functionality. The MiVB platform controls the users' telephony capabilities and manages SIP signaling, call routing, and PSTN and Zoom Phone integration.
- **MiVoice Border Gateway (MBG)**: MiVoice Border Gateway is a software-based network border element designed to deliver superior Voice over IP (VoIP) security and cost savings. It serves as the secure gateway between MiVB and external networks, managing SIP traffic flow and ensuring protected communications.
- **CloudLink Platform**: Mitel CloudLink Platform enables communication between the on-premise PBX (such as MiVoice Business) and cloud-based applications. Acting as the intermediary, CloudLink platform bridges the Zoom and MiVoice Business systems, ensuring seamless account integration.

  To properly associate a gateway with a new customer account on the CloudLink platform, the Mitel Partner or the Account Admin must access the Mitel Administration.
- **CloudLink Daemon**: CloudLink Daemon is a software component designed for integration with multiple unified communication platforms. It complements the CloudLink gateway, which connects premise-based PBXs to the CloudLink platform and CloudLink applications, by enabling additional features.

  The CloudLink Daemon is embedded in the MiVoice Business platform. Its primary function is to facilitate the connection with Mitel CloudLink enabled applications such as Zoom PSI.
- **Mitel Administration**: Mitel Administration is a web-based application that enables Mitel Partners to create and manage customer accounts. It also allows the Account Administrator of a customer account to manage the account and its users.

  Once CloudLink integration is enabled, users within a customer account can access various Mitel applications and third-party CloudLink applications.

For an overview of the documentation set for each key component and additional configuration details, please refer to the **Related Documentation** section and the references throughout this guide.

3.2 Overview of the Phone System Integration (PSI) solution

MiVoice Business (MiVB) and MiVoice Border Gateway (MBG) work together to enable seamless integration between Zoom clients and external networks, including the Public Switched Telephone Network (PSTN).

The MiVoice Border Gateway acts as a secure gateway, managing network boundaries, while MiVoice Business handles core telephony functions including SIP message manipulation and call routing. This integration establishes reliable communication paths between Zoom accounts and MiVB subscribers, ensuring smooth call flow in both directions.

The following chapters provide detailed configuration instructions for integrating Zoom, MiVB, and MBG components into your system.

The guide begins with the configurations needed for the Zoom-CloudLink integration configurations, followed by the steps required before setting up and provisioning Zoom-MiVB users.

Setting Up Users for the Zoom-MiVB Integration

The Zoom-MiVB integration involves several key steps:

1. Configuring Zoom and CloudLink integration.
2. Configuring MiVoice Business in CloudLink.
3. The CloudLink Daemon must be deployed on MiVoice Business and MiVoice Border Gateway.
4. Establish CloudLink connectivity for managing Zoom users associated with MiVB subscribers.
5. Adding users (if not already added) and assigning licenses in your Zoom account.
6. Adding users in Mitel Administration.
7. Completing user provisioning to finalize the integration.

Your system is fully integrated upon completing the configuration steps outlined or referenced in this document. The integration benefits users with seamless call routing, enhanced communication security, efficient traffic management between Zoom clients and the MiVB platform, and a unified user experience across cloud and on-premises systems.

3.3 Related Documentation

Zoom

- Zoom-Mitel Phone System Integration support page

MiVoice Business

- For additional information on **MiVoice Business (MiVB)** , refer MiVoice Business documentation

MiVoice Border Gateway

- For additional information on MiVoice Border Gateway (MBG), refer MiVoice Border Gateway documentation.

CloudLink

- CloudLink Daemon Solution Guide
- CloudLink Gateway User Guide
- Mitel Administration User Guide

Integrating Zoom with CloudLink 4

This chapter contains the following sections:

This chapter describes the Zoom and CloudLink integration process carried out via the Zoom Web Portal and Mitel Administration.

Before proceeding with the configurations, ensure you have the required user accounts and permissions. For more information, see User Roles and Permissions on page 3.

4.1 Adding Zoom integration to a customer account

You can configure integration with Zoom using Mitel Administration. If Zoom integration is enabled for a customer account, users in that account can integrate their Zoom account with their CloudLink applications.

Prerequisites:

- You have a Zoom Business or Enterprise account.
- You have obtained necessary License.
- You have created a dedicated service account (admin user) with a unique email address on your Zoom account portal, exclusively for the integration. For more information, see User Roles and Permissions.

1. Log in to Mitel Administration.
2. Click **Account** from the left main menu.
   The **Account information** page of the customer account opens.
3. In the **Integrations** section, click **+ Add new**.
   The **Integrations** pop-up window opens.
4. Select the **3rd party** tab.
   A pop-up screen displays the available third-party integrations.
5. Scroll down to locate the **Zoom** integration and click **Add** next to it.
6. The Zoom integration is added to the customer account and it is displayed in the **Integrations** section of the **Account Information** page.
7. Go to the newly added Zoom integration and click **Complete Setup**.
8. Click **Connect** on the pop-up window. You will be redirected to accounts.mitel.io to authorize your Zoom Account.
9. Click **Allow** in the authorization window.

Note:
Ensure you are logged in with the correct Zoom admin account.

The integration is complete, and you will see it marked as connected on both the CloudLink and Zoom portals.

Note:
A Partner Administrator cannot enable integrations in their Partner Prime Account, as the integration with other applications are not supported for Partner Accounts. If a Partner wants to explore or test CloudLink integrations, they must create an End Customer Account within their Partner Portal and enable integrations there. For more information about Partner Accounts, see Log in as a Mitel Partner.

4.2 Enabling Zoom integration in a customer account

After adding the Zoom integration to a customer account, you must complete the integration setup.

Prerequisites:

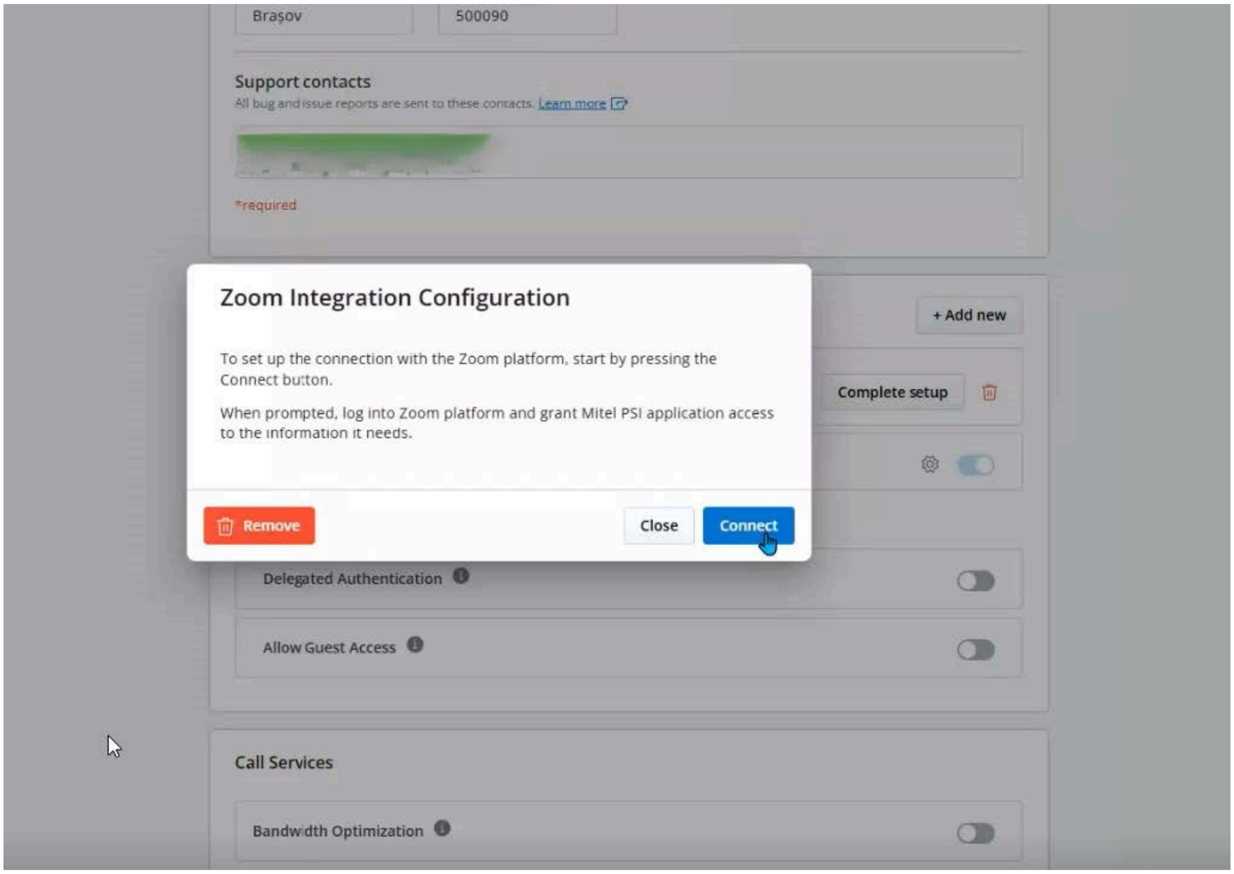
- Zoom integration must be added in the customer account as described in Adding Zoom integration to a customer account.

To complete the Zoom integration setup via the **Integrations** panel:

1. Log in to Mitel Administration as an Account Admin.
2. Click **Account** from the left main menu.
   The **Account Information** page of the customer account opens.

3. Click **Complete Setup** next to the **Zoom** integration in the **Integrations** section.

   The **Zoom Integration Configuration** page opens.



4. Click **Connect**.

   The **Zoom Sign In** window opens.

   If you have already signed in, then you will be redirected to the Zoom Authentication window.
5. Enter the credentials and click **Sign In**.

   The **Zoom Authorization** window opens.
6. Click **Allow** to grant permission for the Zoom application to access and use the CloudLink account information.

   If you click **Decline**, the Zoom integration will not be enabled, and the **Zoom Authorization** window will remain open.

   To continue, close the Zoom Authorization window, click **Connect again** on the Zoom Integration Configuration page, and then click **Allow** in the Zoom Authorization window.

Note:

To maintain a stable and functional integration, follow these best practices:

- Create and use a dedicated service account(admin user) with a unique email address on your Zoom account portal, exclusively for the integration.
- This account must remain active and should not be deactivated.
- This is the admin user that will be used to log into the Zoom account in the following steps.

To remove Zoom integration from a customer account, refer to the Mitel Administration User Guide.

Integrating MiVoice Business with CloudLink

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This chapter contains the following sections:

Mitel Partners and Account Admins can now integrate, enable, and manage MiVoice Business features from the Mitel Administration. It provides a seamless day-to-day user management experience. It allows the Mitel Partner and Administrators to manage the MiVoice Business solution from the Mitel Administration. You can manage features such as templates, telephony services, and call handling rules for a user.

5.1 Integrating MiVoice Business with CloudLink

Prerequistes:

Ensure that you have the following before you proceed to integrate MiVoice Business with CloudLink:

- Gateway integration enabled. For more information about enabling and configuring Gateway, see Integrating CloudLink Gateway in the Mitel Administration.

To integrate MiVoice Business with a customer account, perform the following steps:

1. Log in to the Mitel Administration as an Account Admin.
2. Select your existing **CloudLink customer** account that you want to manage.
3. Access the **Integrations** panel from the **Account Information** page or from the **Integrations & Apps** left navigation menu.
4. In the **Integrations** panel, click **+Add** new. A pop-up screen displays the available integrations.

5. Click the **Add** button associated with **MiVoice Business** and click **Done**.

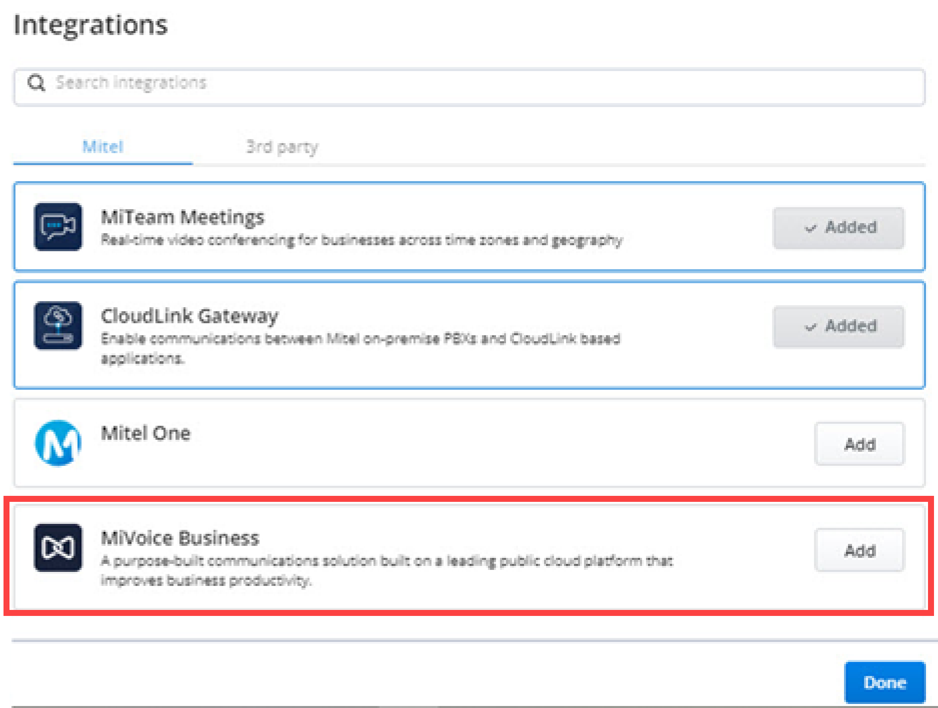
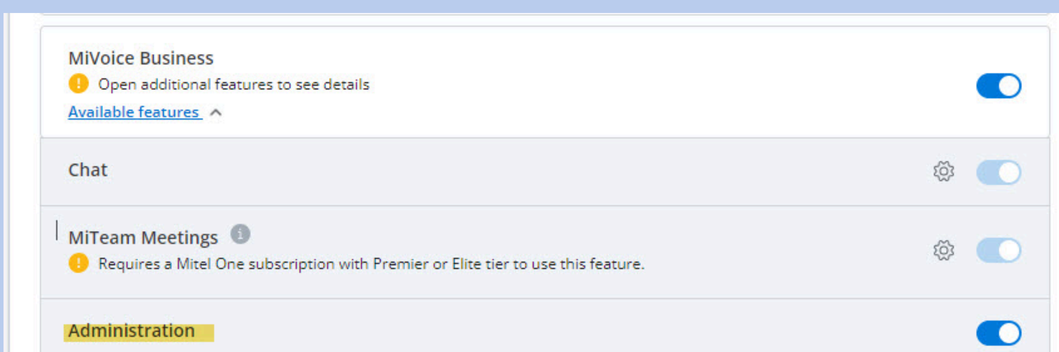


Figure 1: MiVoice Business Integration

Important:

- After you have added **MiVoice Business** integration to the customer account, **MiVoice Business** will be listed in the **Integrations** panel.
- After you enable **MiVoice Business** integration, make sure you enable **Administration** within MiVoice Business integration in order to configure users under User Management.



- To know more about Integrating MiVoice Business on the CloudLink Gateway, refer CloudLink Gateway User Guide and Mitel Administration User Guide.

5.2 Configuring the PBX System Settings in Mitel Administration

Before creating user in Mitel Administration, you can configure the system settings for the PBX.

The PBX system settings configured in the CloudLink Account are not directly synced to the PBX. The settings have to be entered manually in the PBX.

1. Log in to Mitel Administration as an Account Admin.
2. On the left navigation menu click on the name of the PBX e.g. **MiVoice Business** and select **System Settings**.
3. This section allows you to define the following:
   - User extension ranges
   - Direct inward dialing (DIDs)
   - SIP Trunk Application Setup
   -

   > **Note**:
   > To configure these settings, please refer to the MiVoice Business integration section on the Mitel Administration User Guide.

4. In the **Teleworking MiVoice Border Gateway** section,
   a. In the **Default MBG** field, you can refer to the default configuration of MBG used for provisioning teleworker services.
   b. In the **Public Facing Teleworker FQDN (Fully Qualified Domain Name** field, define a public facing teleworker FQDN. This is the public address that Zoom Clients use to connect to your Mitel system. It is crucial for ensuring service continuity, particularly during network disruptions or MBG failover scenarios.

> **Note**:
> If Public Facing Teleworker FQDN is not specified, the Default MBG field value is registered for Zoom phones.

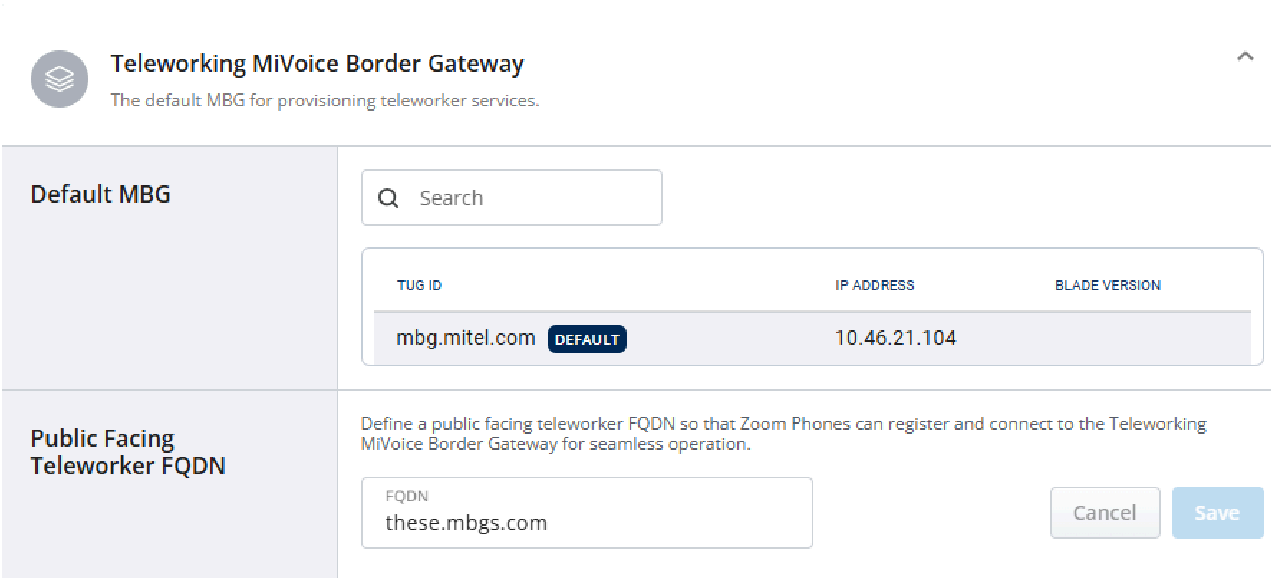


Figure 2: Teleworking MiVoice Border Gateway

5. In the **Emergency Number** area, you can configure the fallback emergency numbers.

   a. To add an emergency number:

   - Click **Dialables**.
   - Start typing a number for emergency calls, e.g: 911, 112.
   - Press enter, space or add a ,(comma) to add the number.

   b. To edit an emergency number, double click on the number and edit it.

   c. To delete an emergency number, click **X** next to the number.

> **Note**:
> You can configure multiple emergency numbers.

6. In the **Dynamic Location provider** area configure a dynamic location provider for the emergency calls.

   a. Enter the following information:

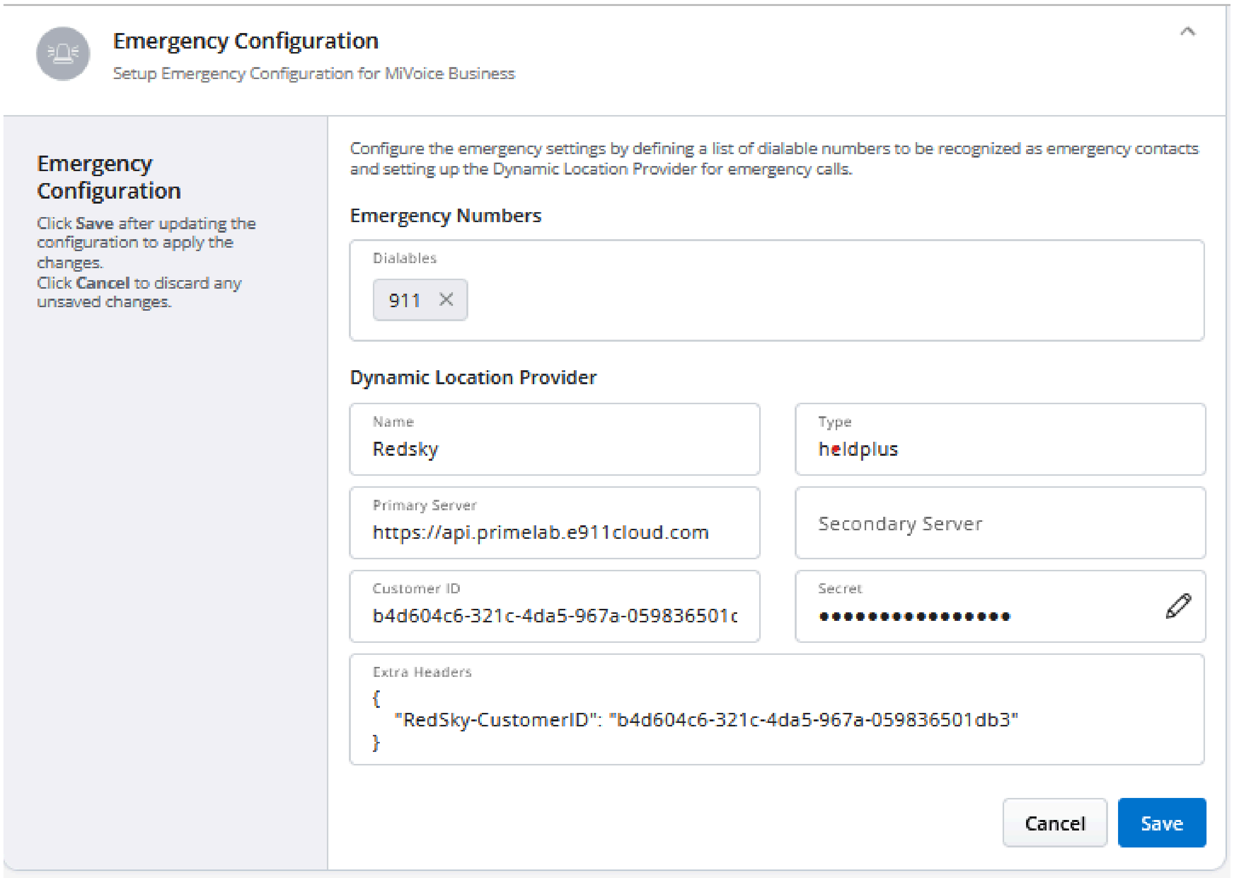
      - **Name**
      - **Type**
      - **Primary Server**
      - **Secondary Server**
      - **Customer ID**: the unique identifier assigned to your organization by the service provider.
      - **Secret**: the private key or token issued by the service provider to secure communication between Zoom client and the service. This acts as a password and should be treated with high confidentiality.
      - **Extra Headers**: additional HTTP headers required by the service provider for platform communication. These headers might include custom authentication schemes, API version, or specific configuration options required by the provider. Input must be added in JSON format.

      Note:

      In some cases, you can retrieve emergency configuration information from your account with your emergency provider.

      However, it is highly recommended to always verify the settings with your emergency provider.

7. Click **Save**.



Note:
All mandatory fields must be completed before clicking save.

If the Zoom client has an emergency configuration enabled, the user will receive the message **Emergency location detected** upon login.

You can check and troubleshoot the settings in the **Event History** page.

5.3 CloudLink Daemon Integration

The CloudLink page enables the CloudLink Daemon, a software component designed for integration with various call servers and platforms. Acting as a user interface, the CloudLink Daemon connects Mitel CloudLink services with on-premises systems like Private Branch Exchanges (PBXs). This integration ensures smooth communication between cloud-based services and traditional on-site telephony infrastructure, enhancing both the functionality and flexibility of communication systems.

Note:
The integration of the CloudLink Daemon is configured via Mitel Standard Linux (MSL).

Enabling CloudLink Daemon

To enable CloudLink Daemon, perform the following:

1. Log in to the Server Manager.
2. Under **Configuration**, click **CloudLink.**
3. In the **CloudLink** page that opens, click **Enable CloudLink Integration**.

Note:
You will see a progress screen. The latest version of the CloudLink Daemon is installed. You can now see the CloudLink Daemon dashboard, where the version details of the installed CloudLink Daemon is mentioned.

Linking CloudLink Daemon to CloudLink

To link CloudLink Daemon to CloudLink, perform the following:

1. After Cloudlink Daemon in enabled, in the CloudLink Daemon page or dashboard that opens, click Link to CloudLink.
2. After the enabled CloudLink Daemon is linked to the CloudLink platform, the CloudLink Daemon dashboard displays the following details:
   - About
   - CloudLink Registration
   - Inventory Report Submission
   - CloudLink Daemon Update
   - Tunnels

Note:
For the details on each of these functionalities, see to the CloudLink Daemon Solution Guide.

Enabling the Tunnel

Follow the steps below to connect the CloudLink Daemon for each component or to enable the tunnel:

1. In the standard view of the CloudLink Daemon dashboard, under **Tunnels**, select a component to connect or link to, and then click **Start.**

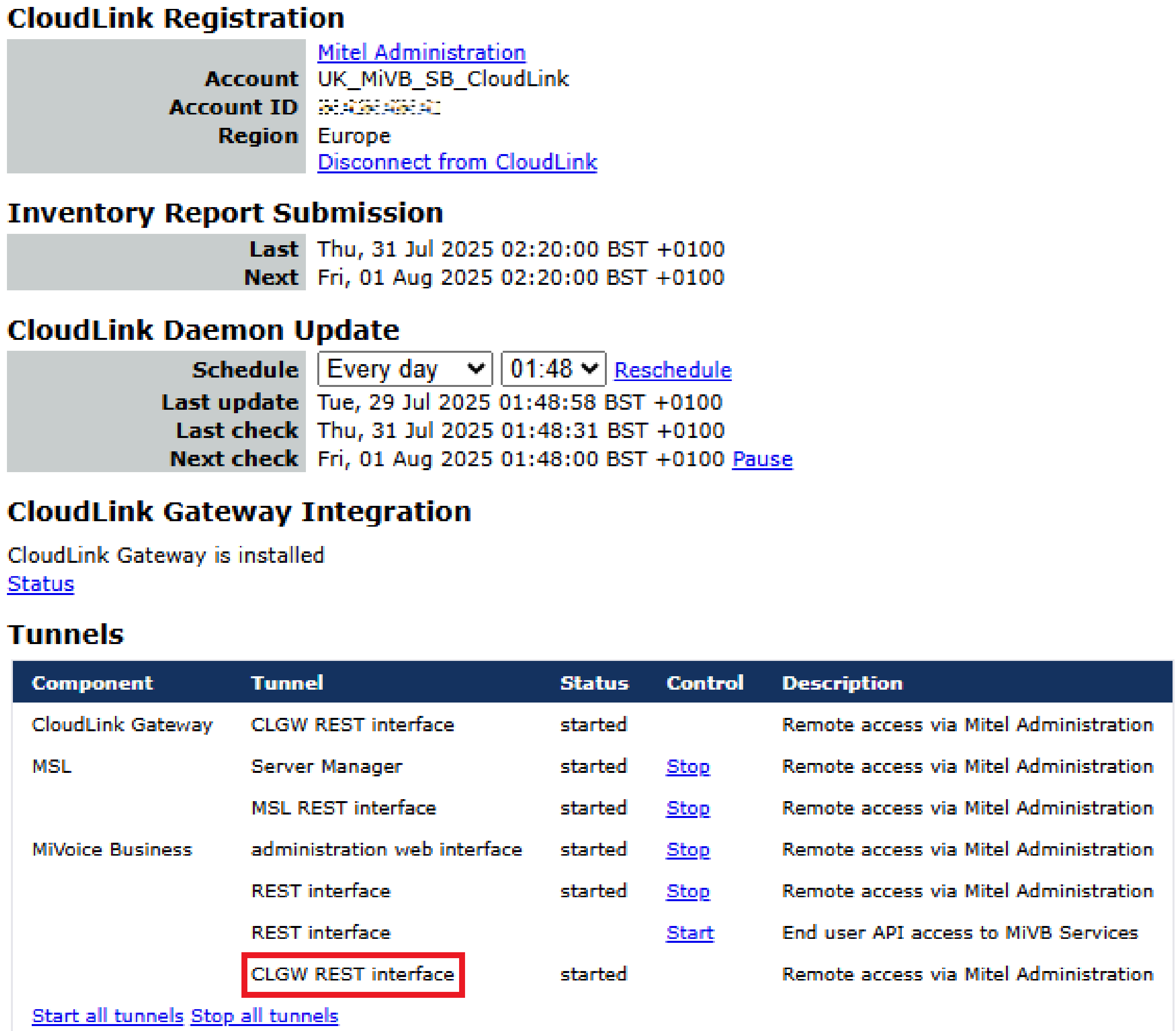
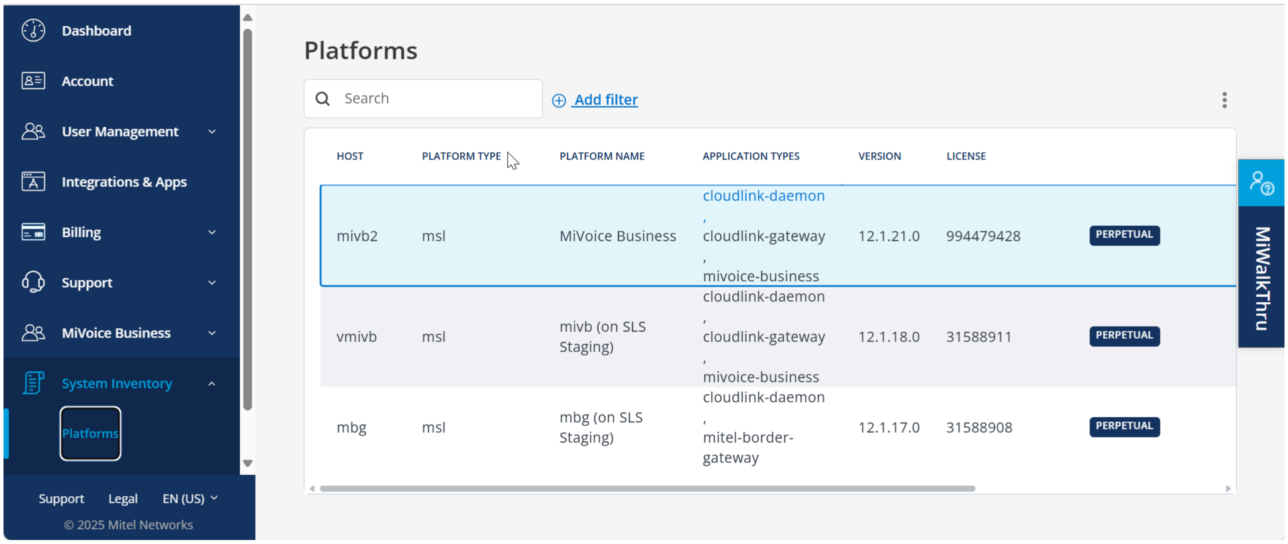


Figure 3: Enabling the tunnel

2. Click **Yes**.

3. Log in to Mitel Administration and navigate to **System Inventory** > **Platforms**. The list of Platforms and Applications that are connected from the Tunnel in Server Manager are now populated under Mitel Administration System Inventory page.



Important:

The CloudLink Gateway blade must be enabled on all user controller MiVB's where users are provisioned. Additionally, the CloudLink Daemon must be enabled on every Mitel Border Gateway (MBG) within the Customer Deployment and registered with the Customer's CloudLink Account.

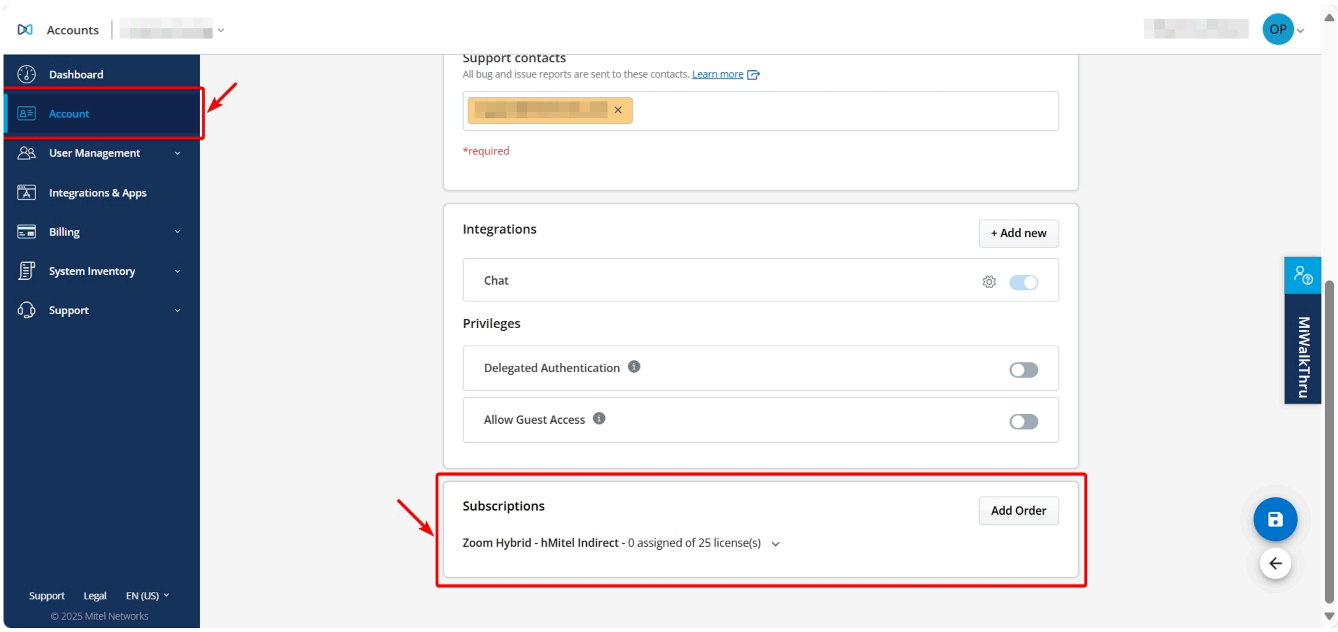
Once the configuration is completed, the platforms and applications will appear in the Customer's CloudLink Account under **System Inventory** in Mitel Administration.

To know more about Integrating MiVoice Business on the CloudLink Gateway, refer CloudLink Gateway User Guide and Mitel Administration User Guide.

Troubleshooting subscription-related errors

6

The **Subscriptions** panel displays the list of all the licenses assigned to the customer account.



Note:

If your account has an active subscription but the integration is not enabled, the following error message appears:

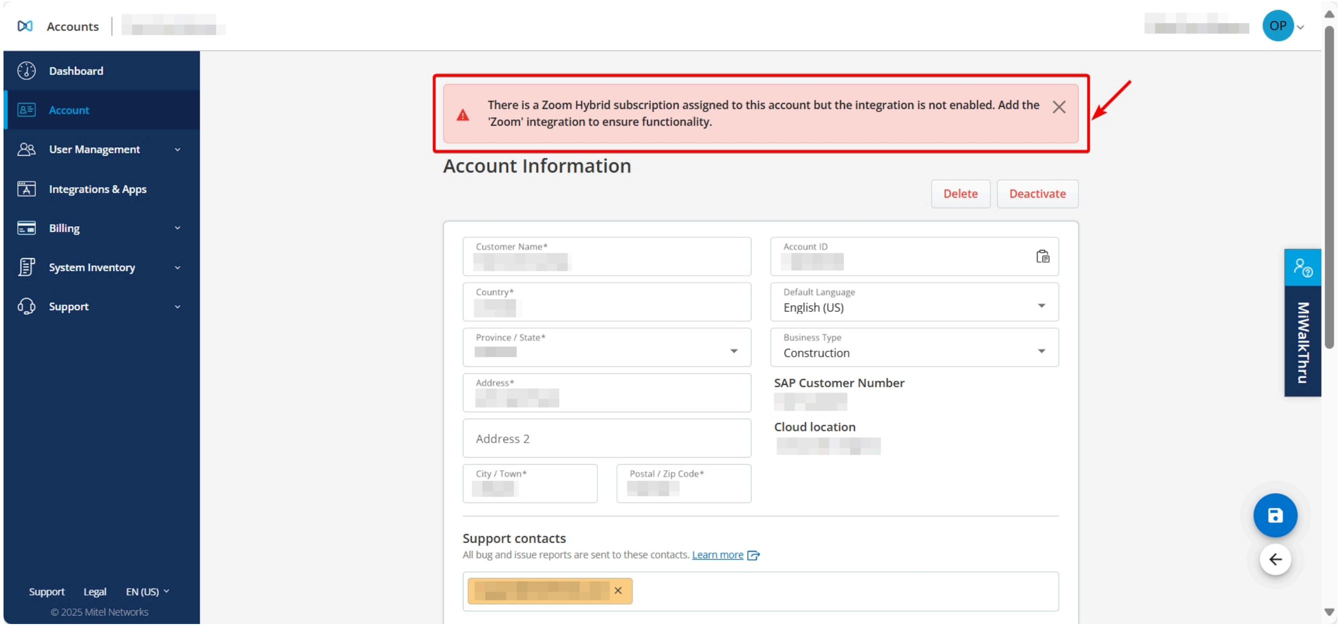
"There is a 'xxxxx' subscription assigned to this account but the integration is not enabled. Add the 'xxxxx' integration to ensure functionality."

Example: Zoom Hybrid Subscription Without Integration

Scenario: You have a **Zoom Hybrid** subscription assigned to your account, but you have not added the Zoom integration.

Result: When you attempt to use the subscription features, the following error message appears:

"There is a Zoom Hybrid subscription assigned to this account but the integration is not enabled. Add the 'Zoom' integration to ensure functionality."



Resolution:

1. Go to the **Integrations** section.
2. Select **+ Add new**.
3. Under the **3rd Party** tab, select **Add** next to **Zoom**.
4. Select **Done**.
5. Complete the integration setup.

Once the Zoom integration is enabled, the subscription features will be available.

Licensing 7

To enable Zoom Workplace integration with MiVoice Business, the following licenses are required for every user:

1. **Zoom Hybrid License subscription**: Required to support Zoom Phone with MiVoice Business and MiVoice Border Gateway.

> **Note**:
> Zoom Supported License per user includes Zoom Workplace Business/Business+, Zoom Workplace Essential/sEnterprise/Enterprise+/Enterprise Premier, Legacy Meeting Licenses ENH/EAH.

2. **MiVoice Business Multi-Device User License**: Required to support both desktop and mobile Zoom Clients.
3. **MBG Teleworker License**: A separate license is required for each Zoom client - one for the desktop client and one for the mobile device.
4. **Embedded Voicemail Mailbox** (Optional): If voicemail is required, a MiVoice Business embedded mailbox license must be used.

If the above licenses are not readily available, they can be added using the part numbers specified below:

Description	Part No	Quantity per user
Mitel Zoom Hybrid License	See CPQ under Subscription Offers / Mitel Zoom Hybrid License Subscription	1
MiVoice Business Multi-Device User License	54005328	1
MBG Teleworker License	54004572	2
Embedded Voicemail Mailbox (Optional)	54000297	1

Provisioning Users 8

This chapter contains the following sections:

- User provisioning in the Zoom tenant
- User Management in Mitel Administration
- Deploy the MiVoice Business Service

Integration between the CloudLink account and the Zoom tenant is established through a process that links the two accounts. On one side, there is the CloudLink account, and on the other, a corresponding Zoom tenant. These are interconnected via a configuration process performed through CloudLink. This chapter outlines the necessary steps for preparing and setting up MiVoice Business subscribers, as well as provisioning users, to ensure seamless integration with Zoom.

8.1 User provisioning in the Zoom tenant

This chapter describes how to add a new Zoom user, set up a new Zoom account, and configure the Zoom-Mitel Phone System Integration.

For more detailed information on managing Zoom users, including deactivating, unlinking, or deleting users from your account, as well as performing actions such as batch importing and user auto-activation, refer to the links below.

- Zoom-Mitel Phone System Integration support page
- Managing users
- Deactivating, unlinking, or deleting users from your account
- Batch importing, exporting, or updating users on your Zoom account
- Auto activating added users
- User Management API's

Zoom single sign-on configuration allows your Zoom users to log in to Zoom using their company credentials.

To configure Zoom single sign-on (SSO), refer to the links below:

- Quick start guide for single sign-on (SSO)
- SSO with Active Directory
- Settings and Configuration for SSO

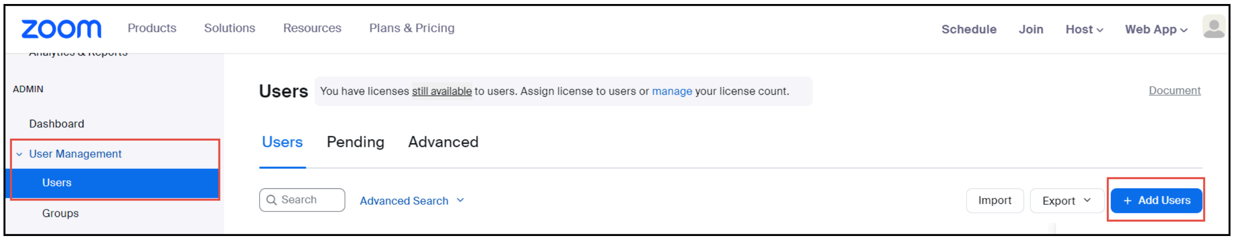
8.1.1 Adding a new Zoom user

An account owner or admin can add users to their account in several ways. This section describes how to add a single new Zoom User, or multiple users by entering their email addresses.

Prerequistes:

- You have a Zoom account, Business or Enterprise.
- You are an Account Owner or Admin with a Role for managing Users, Phone System Integration, and Zoom Phone.
- You have completed Zoom-CloudLink integration, as described in Integrating Zoom with CloudLink.

1. Log in to the Zoom web portal.
2. Navigate to **User Management** > **Users** > **Add Users**.



3. In the **Add Users** pop-up window, enter the user's email address.

   To add multiple users with the same settings, enter multiple email addresses separated by commas:

Note:

Email address is the unique cross-platform identifier for provisioning Zoom and CloudLink users.

4. From the **Zoom Workplace** drop-down menu, select the available Zoom Workplace licenses to assign, such as **Zoom Meetings**.
5. Click **Add**.

   The new user(s) will appear on the **Pending** tab of the **User Management** section.

   New Zoom users will receive an activation email.

   If a user already exists in Zoom, you will be prompted to accept the transfer of their account and be assigned to the new Zoom account owner.

Next Steps

- Activate the user(s) account.
- Assign licenses to users. Before assigning a license to a phone user, ensure that automatic phone assignment for Zoom One licenses is disabled for your account. For more information, refer to the Assigning Zoom Licenses page.

8.1.2 Setting up the Zoom account from invitation

You have received an email invitation from **no-reply@zoom.us** to set up your Zoom account.

Note:
Remember to check your junk or spam folder if you can't find the invitation email in your inbox.

1. Open the email and click **Activate your Zoom Account**.
2. On the **Activate Your Account** screen, enter the following details:
   a. First Name
   b. Last Name
   c. Password
3. Click **Continue**.

   The Zoom user account is activated. In the Zoom Web Portal, the new user(s) will now appear under the **Users** tab of the **User Management** section.

   To recover a disabled, inactive or locked account, refer to the official Zoom support page.

8.1.3 Configuring Phone System Integration settings

As an administrator, you can set up users for the Zoom-MiVB integration.

Prerequistes:

- You have a Zoom account, Business or Enterprise.
- You are an Account Owner or Admin with a Role for managing Users, Phone System Integration, and Zoom Phone.
- You have added Zoom users and assigned licenses to them.

1. Log in to the Zoom Admin Portal.
2. Navigate to **Account Management** > **Phone System Integration**.
3. Go to the **Settings** tab.
4. In the **Integrated calling on Zoom mobile** area, verify the **Allow use the integrated phone system to phone call on Zoom mobile client** toggle is enabled.

Note:

Ensure that this setting is always enabled. For more information, refer to Configuring the Zoom-Mitel PSI integration.

8.1.3.1 Adding Zoom users to the Mitel integration

As an administrator, you can set up users for the Zoom-MiVB integration.

Prerequistes:

- You have a Zoom account, Business or Enterprise.
- You are an Account Owner or Admin with a Role for managing Users, Phone System Integration, and Zoom Phone.
- You have added Zoom users and assigned licenses to them. Zoom user accounts are activated.

1. Log in to the Zoom Admin Portal.
2. Navigate to **Account Management** > **Phone System Integration**.

   The **Integrated users** tab is displayed.
3. Click **Add users**.

   The **Add users** window pops up.
4. Select the user(s) you want to activate.

> **Note**:
>
> You can add a maximum of 50 users at a time.
>
> Ensure that the email address of the user(s) you add matches the email address that was used while creating the Zoom user and the assigned license.

5. Click **Add**.

   The new user(s) will be added under the **Integrated Users** tab with the status **Pending SIP credential**.

   This status will be updated once the MiVB subscriber-Zoom user integration is completed.

   To add non-Zoom users to Zoom directory, refer to the Creating a shared directory of external contacts page.

   To import users with a CSV file, refer to Zoom-Mitel Phone System Integration support page.

8.2 User Management in Mitel Administration

This section provides information related to user management in Mitel Administration.

Prerequistes:

- Before proceeding, the admin must either import the required template from the MiVoice Business or use a predefined template.

> **Note**:
> Please refer Creating User by choosing Pre-defined User templates section and Creating User Templates section for more information.

- Additionally, ensure that the MiVoice Business PBX System Settings are properly configured.

Mitel Administration for MiVoice Business imports all the PBX users who have a voice service associated into CloudLink. In addition to this, you can create new users from **Mitel Administration** > **Users** page. You can also modify the role of an existing or new user to be a customer administrator from the **Users** page. Users in Mitel Administration can be created through multiple methods. Refer to the sections below for detailed instructions.

> **Note**:
> For more information on User Management in Mitel Administration, Please refer to the Mitel Administration User Guide.

8.2.1 Creating Users by Choosing Pre-defined User Template

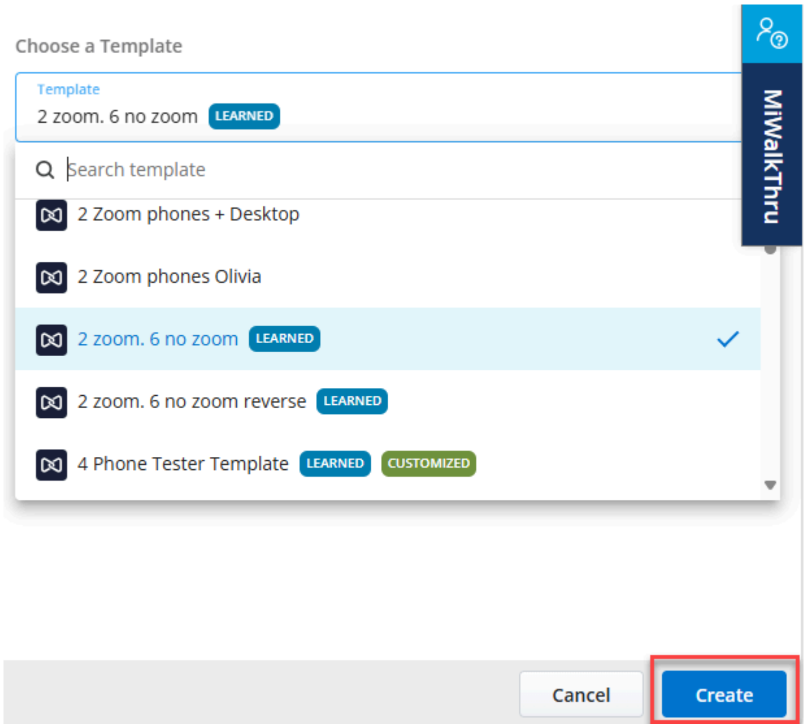
To create new users, complete the following steps:

1. Under **User Management**, click **Users**.
2. Click **Add User** in **Users** page.
3. In the **New User** page, do the following:
    - Enter the mandatory fields - the **First Name**, the **Last Name** , and the **Email Address**.

    > **Important**:
    > The key that links users in Zoom and CloudLink is their email address. Ensure that email addresses are entered correctly to maintain proper user mapping.

    - (Optional) Enter the mobile number in the **Mobile Number** field.
    - **For Admins Only**: Select the **Account Admin** option. A welcome email is sent automatically to the new Account Admin user.
    - (Optional) in the **Choose a Template** drop down, search by name or select from the list the User Template to add a MiVoice Business Service.

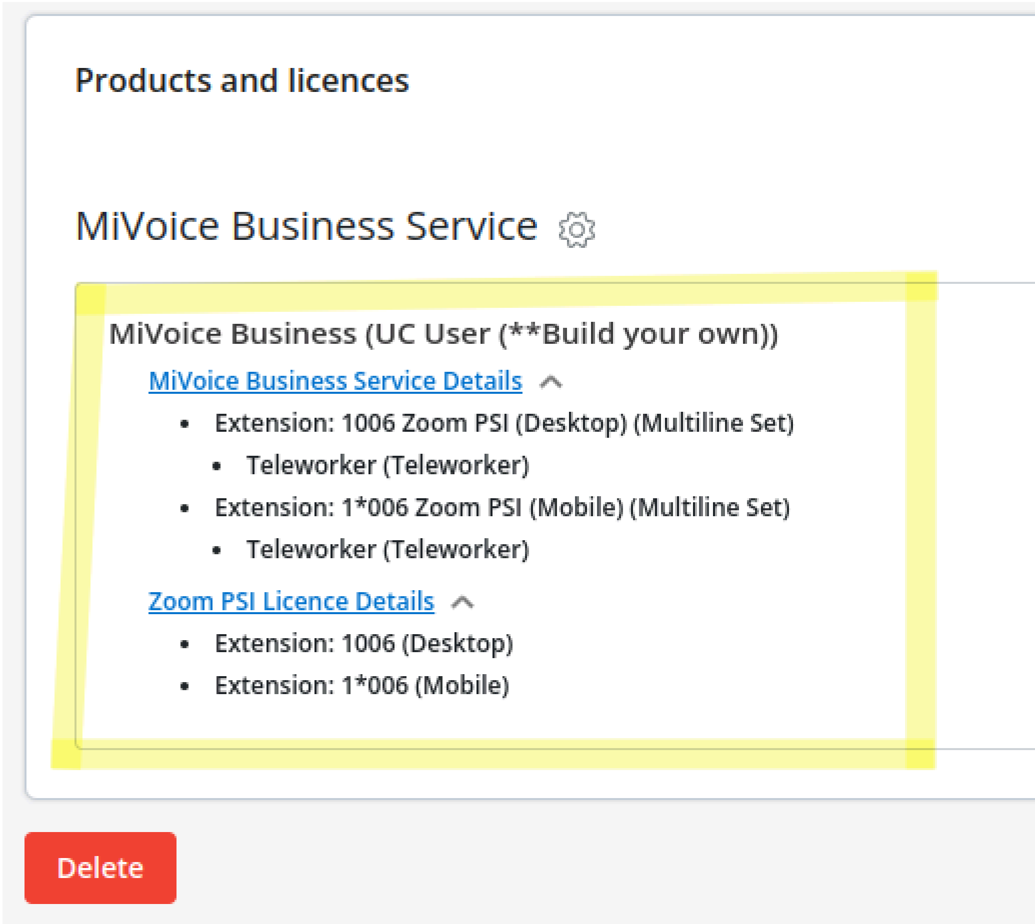
Note:
If the template has not been added, follow the steps in the Creating User without User Template section to complete the configuration.



- Click **Create**.

4. Verify and update the **User Configuration** details. Click **Save**.

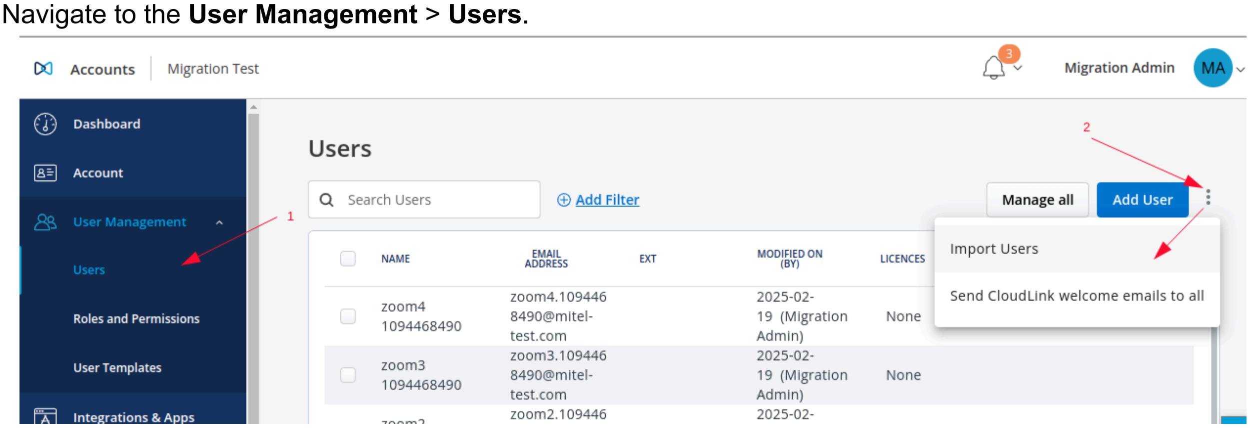
5. Once the configuration is completed, you can see the MiVoice Business service and Zoom Phones provisioned under **User** > **Products and Licenses**.



8.2.2 Import Users

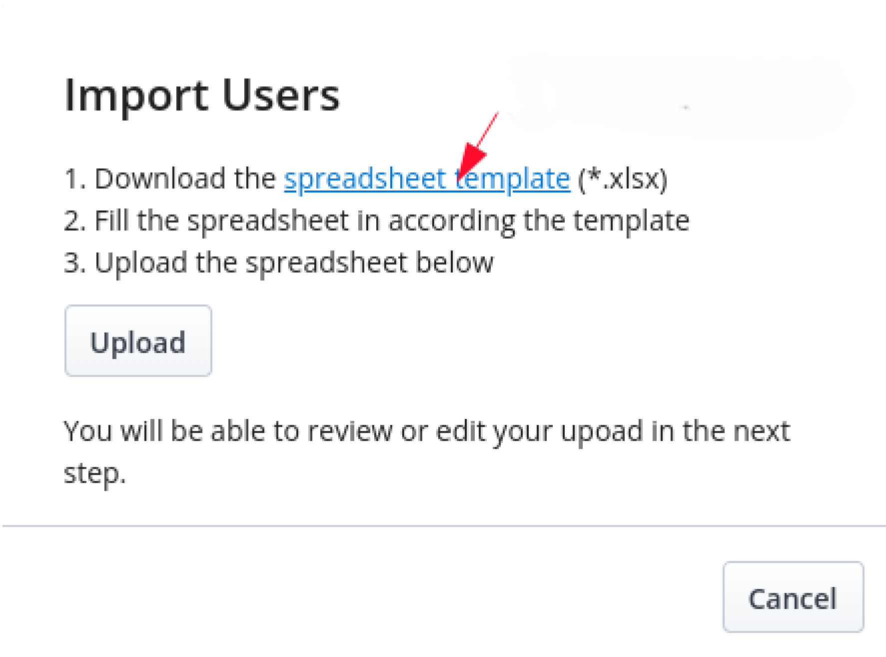
To import the Users into the Mitel Administration:

1. Navigate to the **User Management** > **Users**.



2. Next to add Users, Click the **dots** and select **Import Users**.

3. From **Import Users** page, download the **spreadsheet template** file.

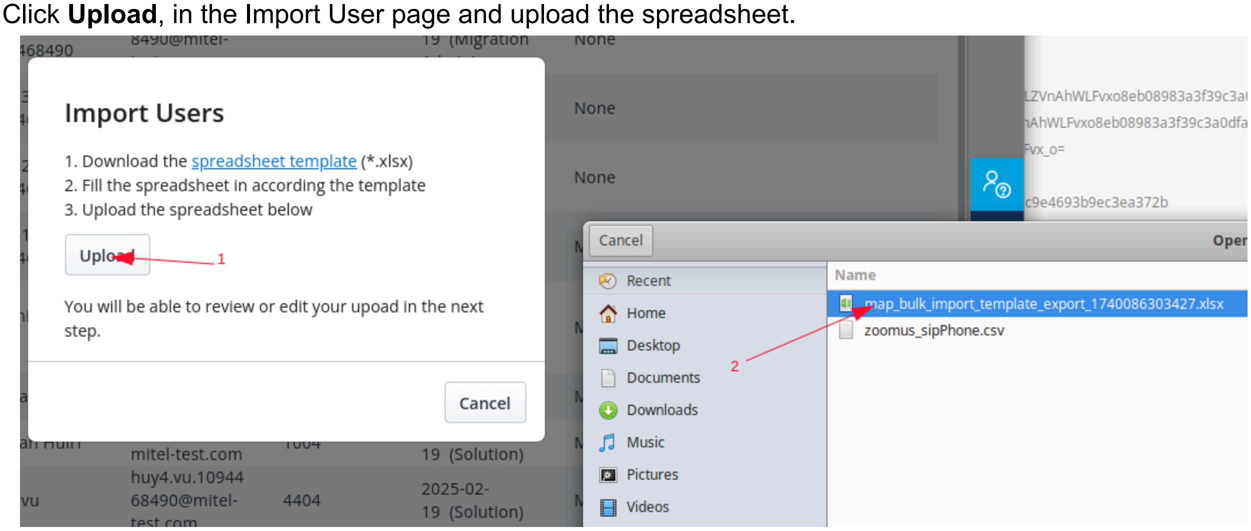


4. Enter the following users details in the downloaded spreadsheet

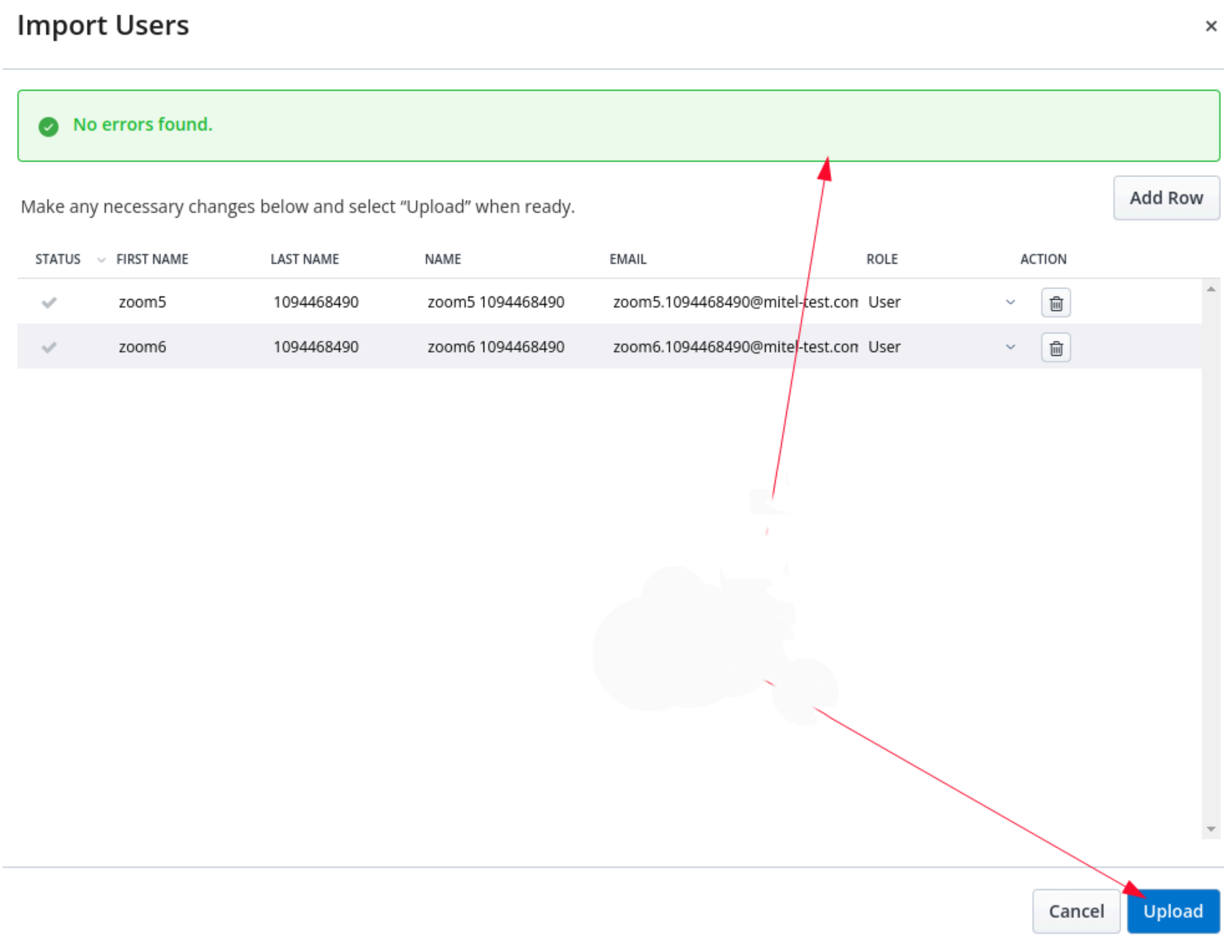
   a. **First Name**
   b. **Last Name**
   c. **Name**
   d. **Email ID**
   e. **Role**

> **Note**:
> After entering the user details, do not forget to save the downloaded spreadsheet to ensure all changes are retained.

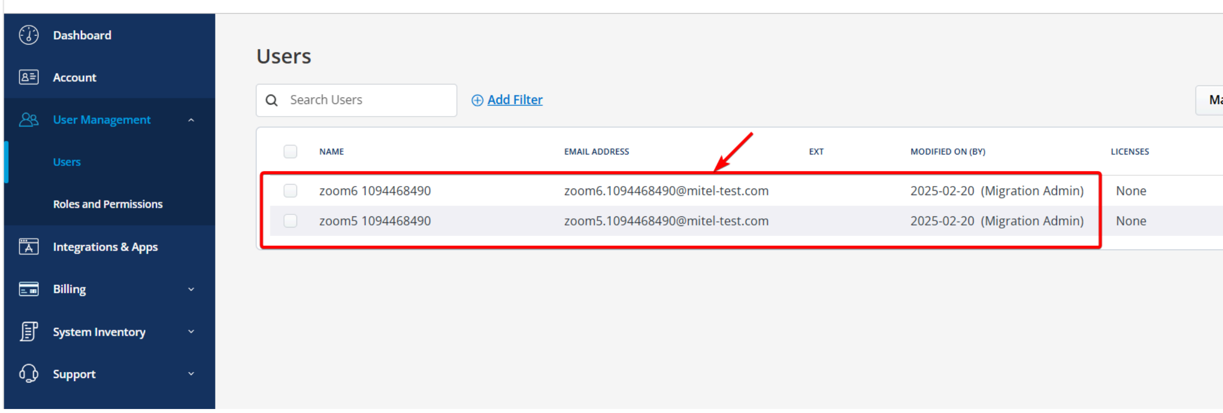
5. Click **Upload**, in the Import User page and upload the spreadsheet.



6. A **No errors found** dialog will appear in the green box. After that, click **Upload**.



7. When users are successfully uploaded, they will appear under **User Management** > **Users**.

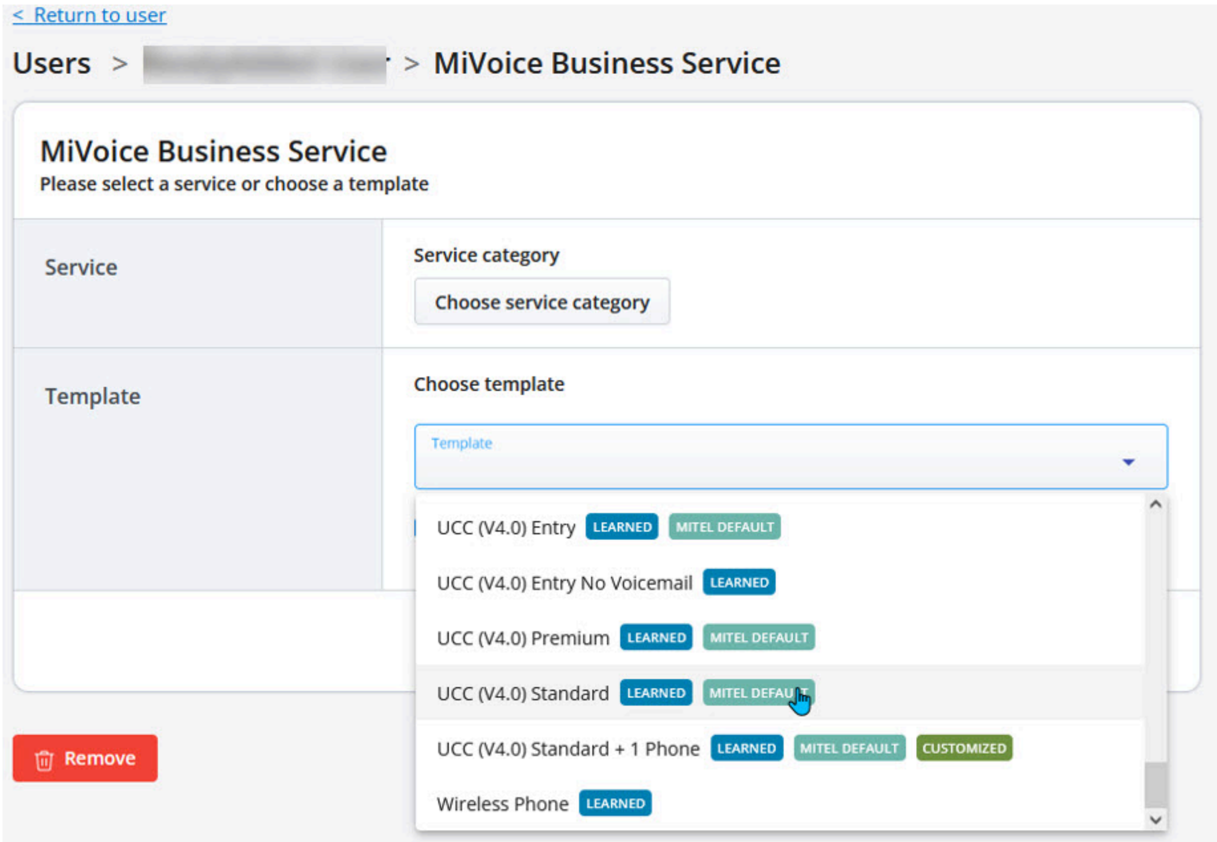


8.2.3 Choosing User Template by name during MiVoice Business Service

You can choose a User Template by name when completing setup for the user's MiVoice Business service, do the following:

- Navigate to **User Management** > **User** > **Select the name of the User**.

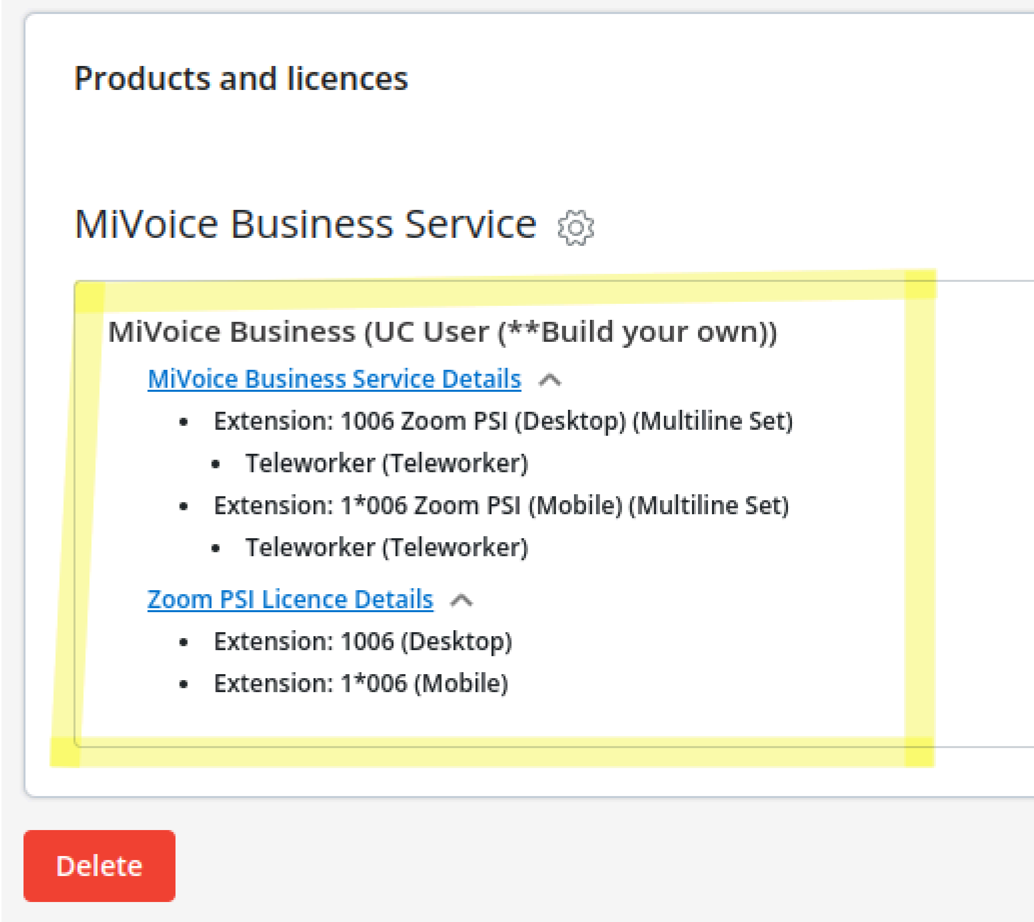
- Under **Products and licenses**, click **Add Product**.
- Click **Add under MiVoice Business**.
- Click **Done**.
- Go to the **Products and licenses** section of the user, click the **Complete setup** button next to **MiVoice Business (no service assigned)**.
- In the **Choose template** dropdown, search by name or select from the list the User Template to add a MiVoice Business Service.



- Click **Apply Changes**.
- Verify and update the **User Configuration** details. Click **Save**. MiVoice Business services are added for the user.

> **Important**:
> For each phone added, it is recommended to use a strong **MBG SIP password**. There are two ways to create it:
>
> 1. Click the edit icon and manually set up a new password.
> 2. Auto-generate a strong password.

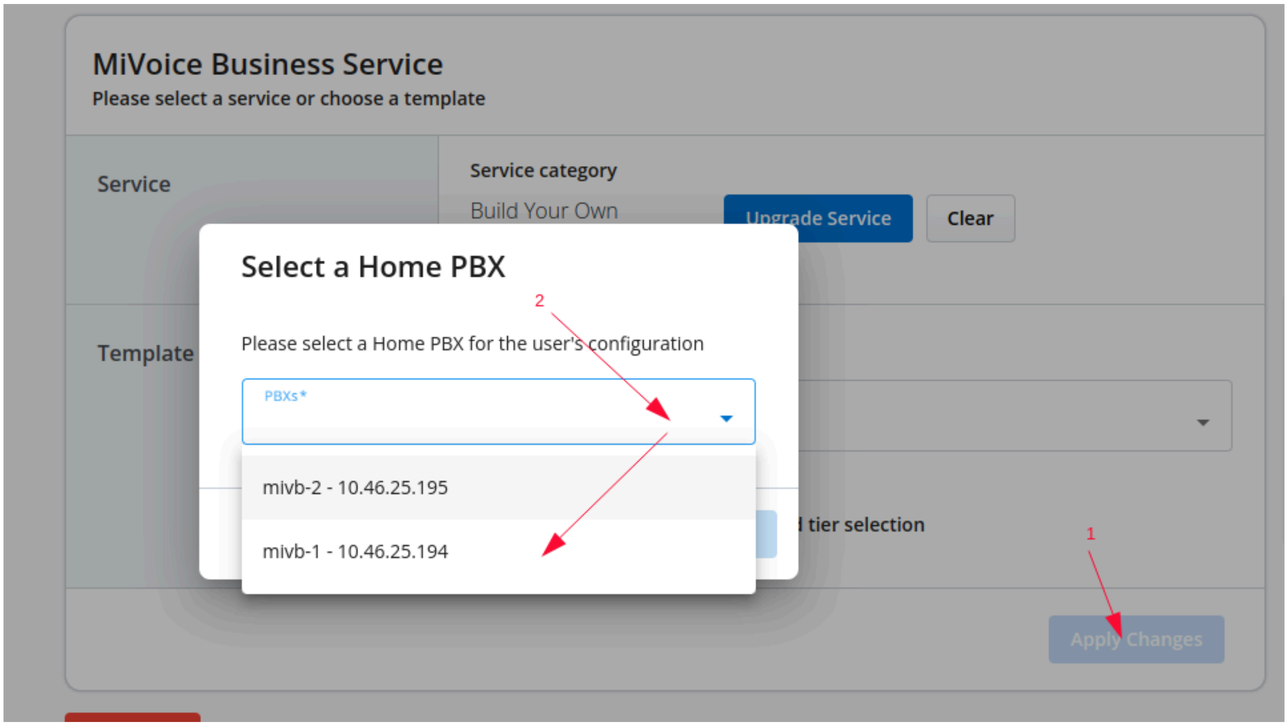
- Once the configuration is completed, you can see the MiVoice Business service and Zoom Phones provisioned under **User** > **Products and Licenses**.



8.2.4 Creating User without User Template

1. Navigate to **User Management** > **User** > **Select the name of the User**.
2. Under **Products and licenses**, click **Add Product**.
3. Click **Add under MiVoice Business**.
4. Click **Done**.
5. Go to the **Products and licenses** section of the user, click the **Complete setup** button next to **MiVoice Business (no service assigned)**.
6. In the **Choose template** dropdown, Select **None** and click **Apply Changes**.

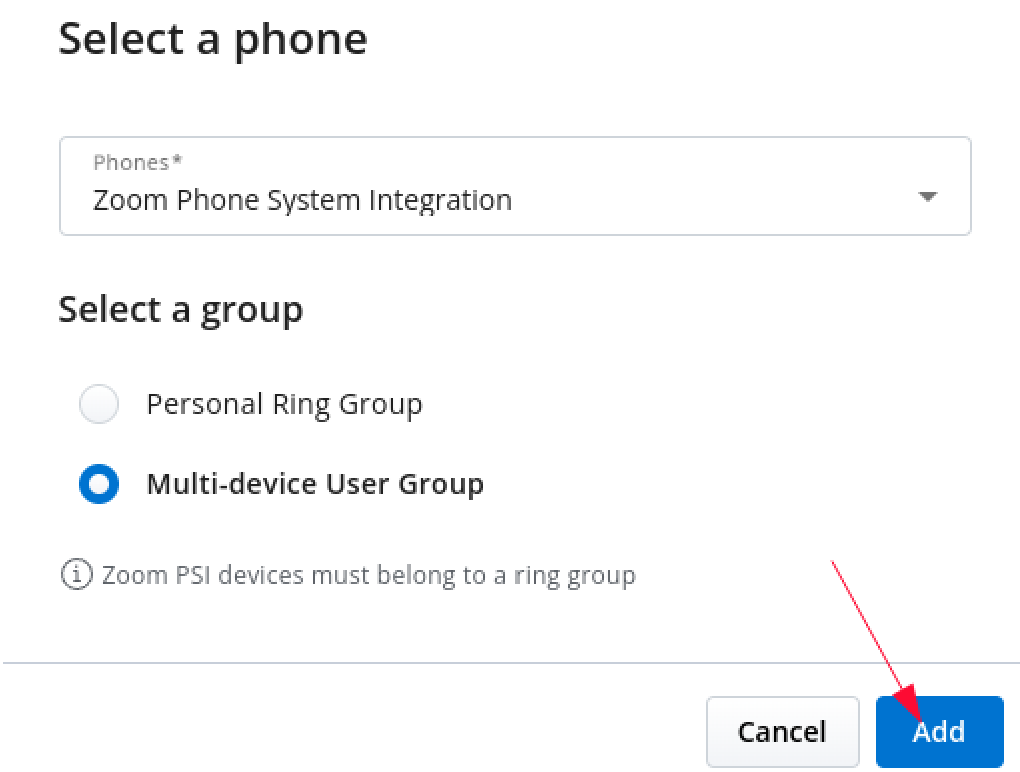
7. In the Select a Home PBX window, select the MiVB for the user.



8. In the **User Configuration** window, configure the following:

- Under **Phones**, do the following:

  a. Click **Add Phone**.
  b. In the page that opens, select **Zoom Phone System Integration** .
  c. Click **Add**.
- In the Select a group field, select **Multi-device User Group** and Click **Add**.

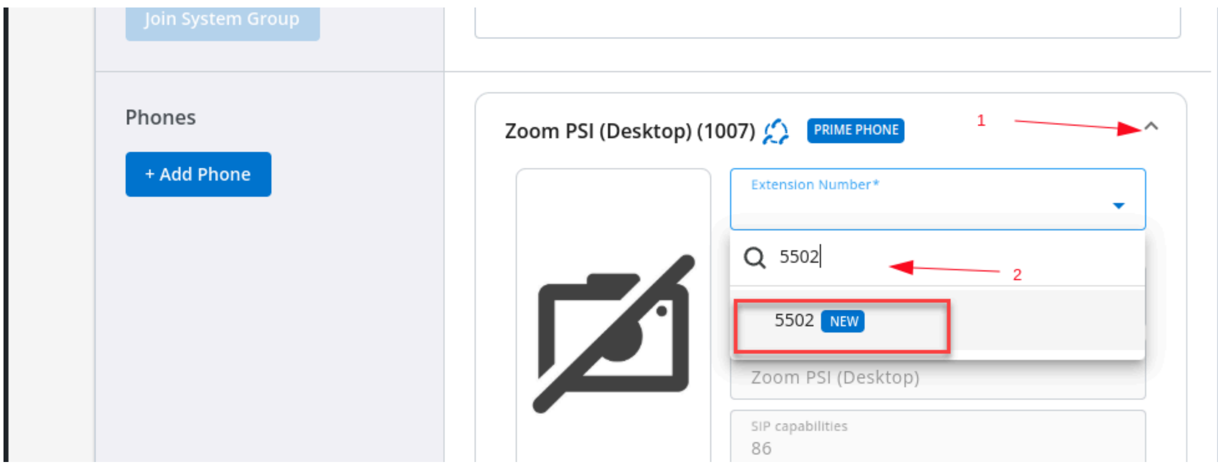


- The two **Zoom Phones** (PSI Desktop and PSI Mobile) are automatically configured and appear in Phones field.

Important:

- When building a **Zoom-specific user template**, it's important to understand that certain configurations are **non-negotiable**.
- When you select the Zoom PSI, the **Service Programming** and **Phones** fields are automatically populated. By default, the user is part of the **Multi-Device Service Group**, and a minimum of **two Zoom phones** are added and configured as **Teleworker devices** with SIP Capability Index **86**.
- When the phones are created, the **four Multicall keys** are automatically set up for the phones.

- If you want to change the assigned extension or assign a new one, expand the **Prime Phone**, In the **Extension Number** field, enter the desired extension and select the number that pop up in the drop-down menu.



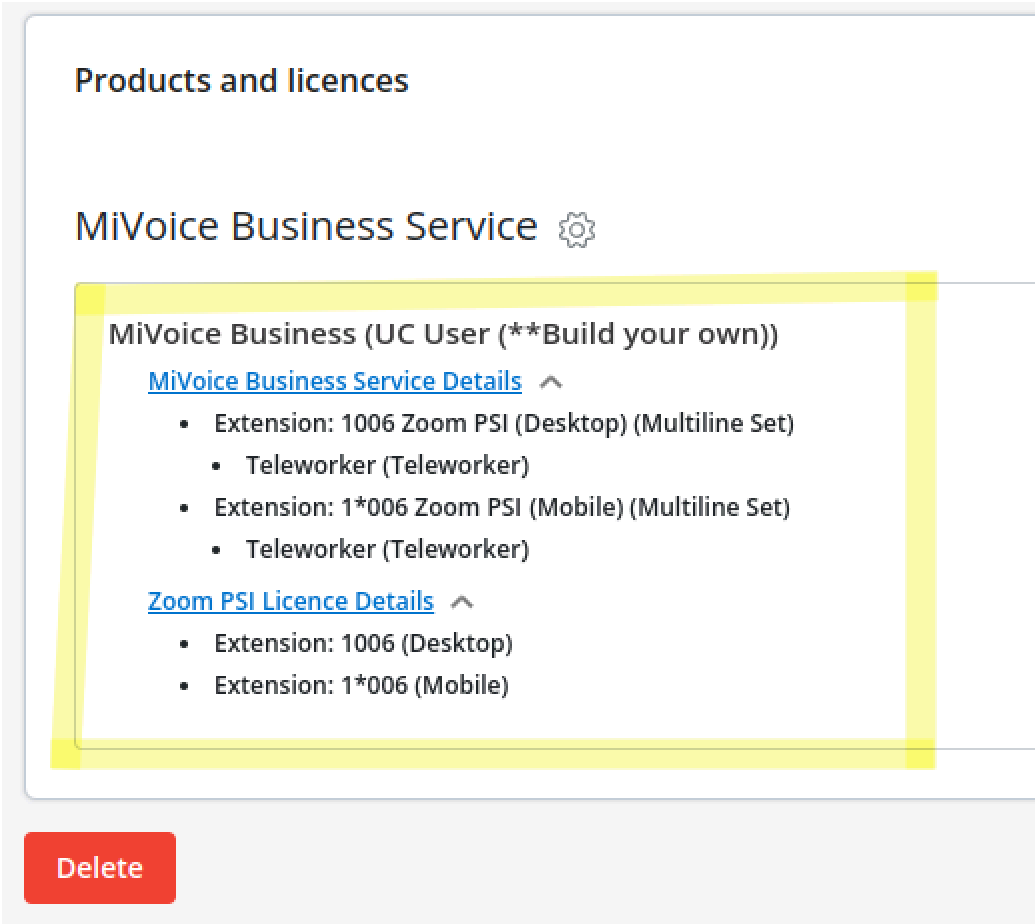
- In the **Derived Extension for Prime Group** window, verify the newly added extension and click **Yes**.

Important:
For each phone added, it is recommended to use a strong **MBG SIP password**. There are two ways to create it:

a. Click the edit icon and manually set up a new password.
b. Auto-generate a strong password.

9. Click **Save**

10. Once the configuration is completed, you can see the MiVoice Business service and Zoom Phones provisioned under **User** > **Products and Licenses**.



8.2.5 Creating User Templates

User templates reduce the time it takes to enter user and device data. Common settings, such as the Class of Service and Device Type, can be saved in a user template and applied to multiple users. Likewise with Key Templates which allow you program features to a set of keys and then assign them to selected phones. Data unique to each user and device, such as prime directory number and user name, can be entered later on to complete the provisioning requirements.

Mitel Administration supports four types of user templates and each template can be identified by using the associated tag in the **User Templates** page, as described below:

- User template created locally created from Mitel Administration - **no tag**
- User templates imported from MiVoice Business - **Learned**
- User template that is replicated and modified from an existing template - **Custom**
- Default key template where you can update the field values, but cannot rename or delete it nor change the Device Type - **Default**

To create a user templates in Mitel Administration:

1. Go to **User Management** and click **User Templates**.
2. Click **Create Template**.

3. In the **Create User Template** page that opens, do the following:

   a. Enter a name in the **Template** name field.
   b. Enter a description in the **Description** field.
   c. Optional: Select the **Voicemail** option.

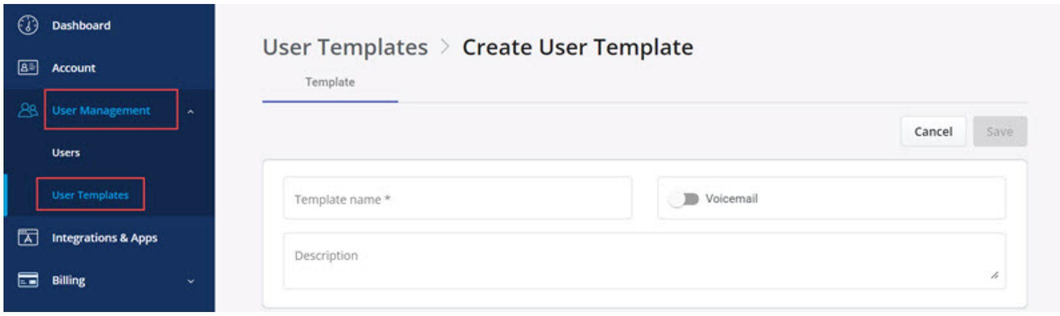
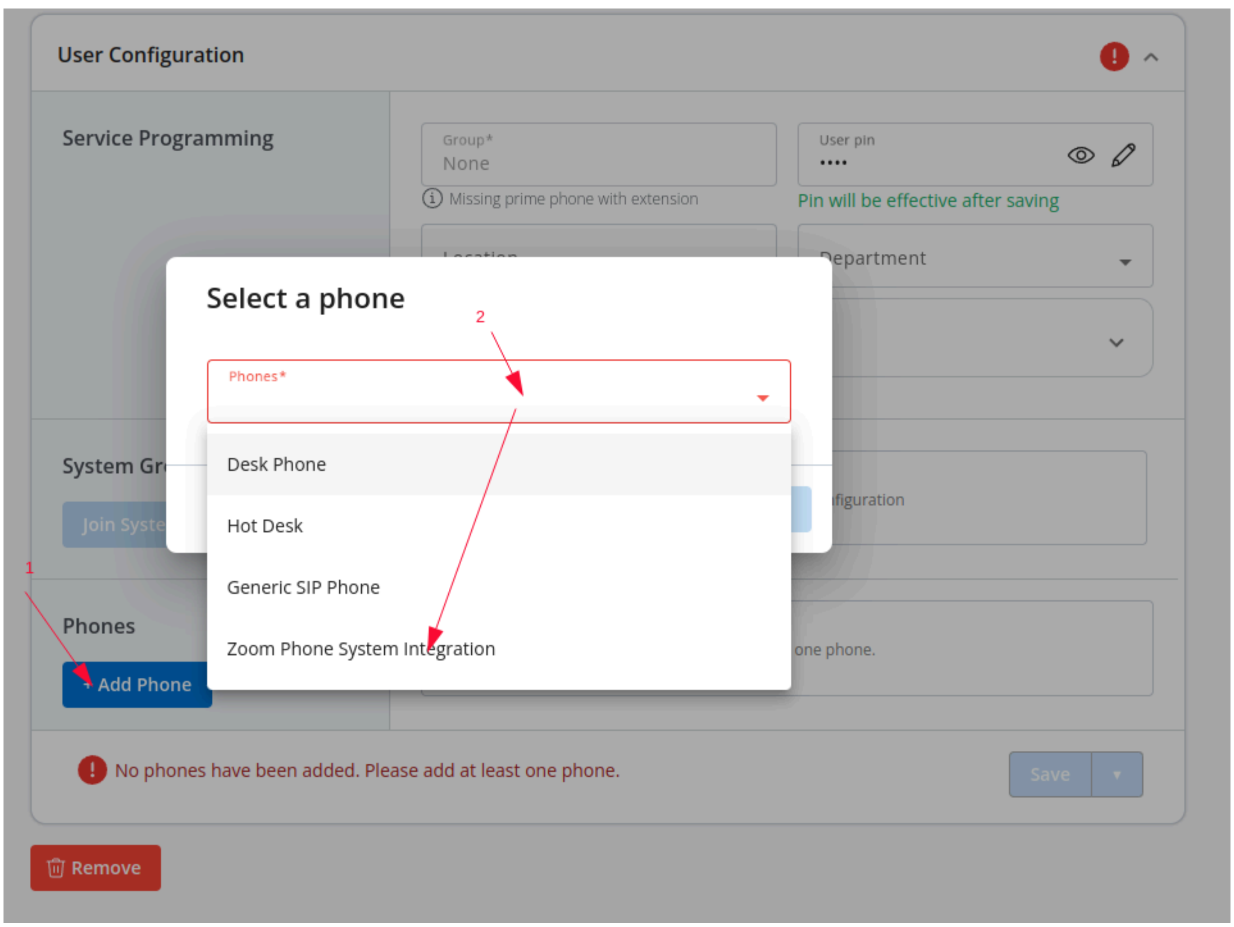


Figure 4: Create User Template Page

   d. Under **Phones**, do the following:

      i. Click **Add Phone**.
      ii. In the page that opens, select **Zoom Phone System Integration (PSI)**.
      iii. Click **Add**.



> **Important**:
>
> - When building a **Zoom-specific user template**, it's important to understand that certain configurations are **non-negotiable**.
> - When you select the Zoom PSI, the **Service Programming** and **Phones** fields are automatically populated. By default, the user is part of the **Multi-Device Service Group**, and a minimum of **two Zoom phones** are added and configured as **Teleworker devices** with SIP Capability Index **86**.
> - When the phones are created, the **four Multicall keys** are automatically set up for the phones.

e. Click **Save**.

8.2.6 Importing User template from MiVoice Business

User Templates can also be predefined directly on the MiVoice Business (MiVB) and later imported into the solution when managing or adding new users. The CloudLink administrator can **Import templates** or Import templates by name.

Prerequisites:

1. The template must define exactly two **Zoom Workplace** devices.
2. The MiVB template builder must configure the following:
   - Configure the correct **SIP Capabilities**
   - Assign the appropriate **Key Templates**
   - Define a **Role Alias** for the User Template

Limitations of Imported Templates:

When a Solution User Template is imported, it will not define the following:

- The type of **Personal Ring Group.**
- Whether the Zoom phones use **Teleworker service**.

Automatic Configuration in Mitel Administration:

Once the template is imported into Mitel Administration, the system will,

- Automatically assign the correct **Personal Ring Group**.
- Configure **Teleworker service** for each Zoom phone as required.

Important:

- It is strongly recommended for Templates to be imported from the MiVoice Business. For more information refer **Configuring the User and Service Templates** section on the *MiVoice Business System Administration Online Help.*
- When importing Solution User Templates, Mitel Administration may be unable to import certain User Templates due to the following reasons:
  - Any User Template that does not have a 'role' associated with it cannot be imported.
  - The User Templates that does not have phones are not supported.
  - The User Template has a different Primary PBX than the 'Home PBX' configured in the CloudLink Gateway it cannot be imported.

8.2.7 Updating MiVoice Business Telephony services for a User/Account

To update the MiVoice Business Telephony services for a user/account:

1. Under **User Management**, click **Users**.
2. Click on the user/account for whom you want to update the MiVoice Business telephony services.
3. Under **Products and licenses**, click the **Settings** icon.
4. Go to **User Configuration** and click the telephony service you want to update.
5. Click **Save** to update the MiVoice Business Telephony services for the user/account.

8.2.8 Editing by Using Bulk User Edit

To update user information in bulk, do the following:

1. Under **User Management**, click **Users**.
2. In the **Users** page that opens, select multiple users for updating the information.
3. Click **Manage**.
4. In the page that opens, under **Bulk User Settings**, make the required updates.
5. Click **Save**.

8.3 Deploy the MiVoice Business Service

To Deploy the MiVoice Business Service to the created user:

1. Navigate to the **User Management** > **User** > **Select the name of the User**.

2. Under **Products and licenses**, click the **Settings** icon.
3. Click **Deploy**.

After deployment, as part of the onboarding process, the target users will receive two emails:

Introduction to Services: This initial email introduces the user to their services and provides an overview of the available features.

Welcome to your communication services

Hello,

You can find your service information in this email. Please note your password will be sent out in a separate email.

Phone Details

Prime Phone: Phone Service (3322)
Phone Type: Desk Phone
Extension: 3322
Phone Model: 6905_IP

Zoom PSI (Desktop) (3*322)
Phone Type: Desk Phone
Extension: 3*322
Phone Model: zoomPSI
SIP Username:

Zoom PSI (Mobile) (33*22)
Phone Type: Desk Phone
Extension: 33*22
Phone Model: zoomPSI
SIP Username: j

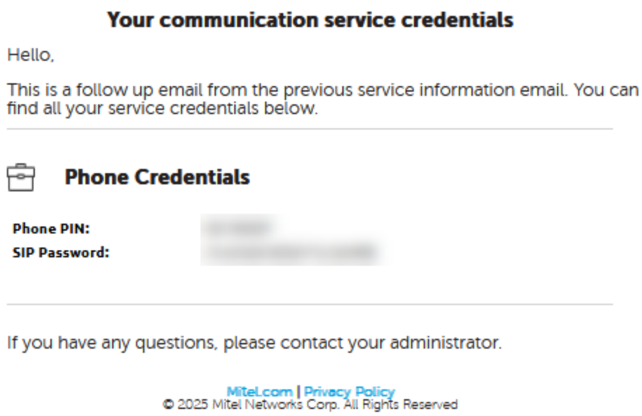
Zoom Collaboration Details

You have been assigned a Mitel phone service for Zoom Workplace. An email will be sent by Zoom with additional details and instructions regarding this service.

If you have any questions, please contact your administrator.

Mitel.com | Privacy Policy

Service Credentials Email (Account Details) The second email includes the user's service credentials.



Your communication service credentials

Hello,

This is a follow up email from the previous service information email. You can find all your service credentials below.

Phone Credentials

Phone PIN:	
SIP Password:	

If you have any questions, please contact your administrator.

Mitel.com | Privacy Policy

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Note:

The registration of the Zoom client does not require either the SIP username or password. However, these credentials are included as part of the standard "Welcome to Your Service" email templates to support any alternative softphones or telephony clients the user may choose to register for their telephony service.

Managing Zoom Services for MiCollab Users

9

This chapter contains the following sections:

This section provides step-by-step procedures for administrators to manage Zoom Phone services for users integrated with MiCollab. It covers onboarding new users, provisioning Zoom devices for existing MiCollab users using both template and manual methods, and removing Zoom services when no longer required. These procedures ensure consistent configuration and seamless communication across platforms.

9.1 Audience

- Partner Administrators
- IT Administrators
- Service Providers

9.2 Prerequisites

Software Versions:

- MiVoice Business (MiVB) 10.3.0.16 or higher
- MiVoice Border Gateway (MBG) 12.2.0.72 or higher
- MiCollab 10.0 SP1 FP1 or higher
- Zoom Workplace Client 6.4.1 or higher

Licensing:

- Zoom Hybrid License Subscription
- MiVoice Business Multi-Device User License (MDUL)
- MBG Teleworker License (one per Zoom client)
- Embedded Voicemail Mailbox (optional, EMEM only)

Accounts and Permissions:

- CloudLink Account with MiVB integration
- Zoom Tenant with PSI licenses
- Dedicated Zoom Admin (service account)
- Mitel Admin with CloudLink access

9.3 Managing Zoom Phone Provisioning and De-provisioning

This section outlines the procedures for managing user provisioning, device setup, and service removal in a MiCollab-Zoom integrated environment.

9.3.1 Provisioning Zoom Devices for Existing MiCollab Users

This procedure describes how to provision Zoom Phone services for users who are already configured in MiCollab. You can complete this task using one of the following methods:

- **Update Template Method** - Update the user's assigned template in Mitel Administration to include Unified Communications and Collaboration (UCC) and Zoom capabilities. This method streamlines provisioning by applying predefined configurations.
- **Add Phone Method** - Manually assign a Zoom Phone to the user by adding the Zoom Phone System Integration through the user's profile in Mitel Administration.

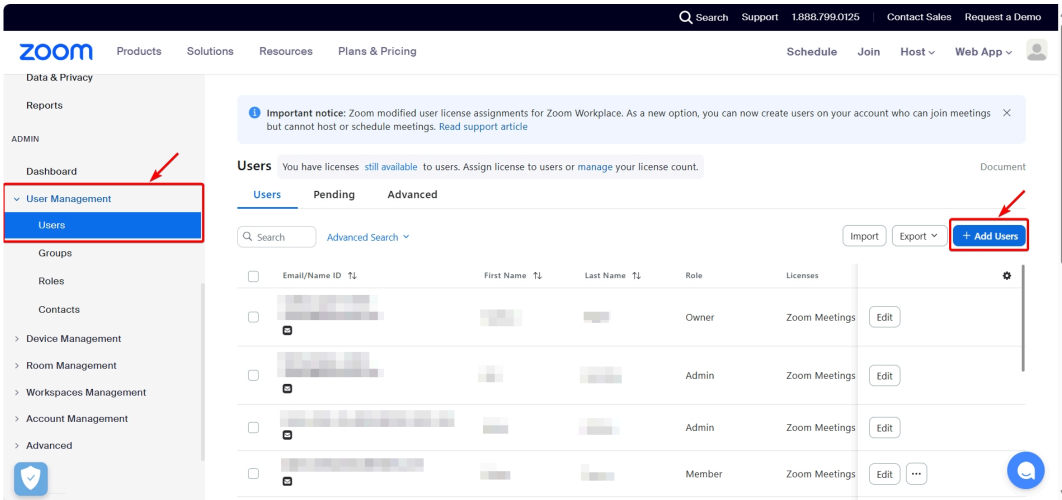
9.3.1.1 Update Template Method

Note:
Before using the Update Template Method, make sure a user template exists that includes both Unified Communications and Collaboration (UCC) and Zoom features.Refer to the *Updating a User Template to Include Zoom Phone with MiCollab* section for instructions on how to modify a template to include Zoom functionality.

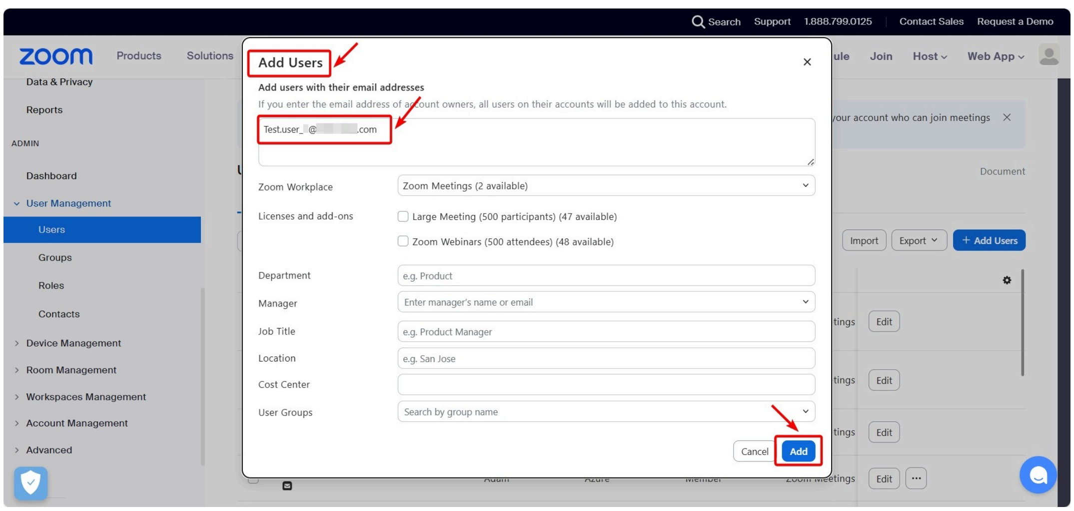
This procedure outlines the steps to provision Zoom Phone services for existing MiCollab users by updating the user's assigned template in Mitel Administration. This method ensures that the user is configured with both Unified Communications and Collaboration (UCC) and Zoom capabilities.

1. Create and Activate a New Zoom User:

a. Sign in to the Zoom tenant as an admin user.



b. Navigate to **User Management** > **Users** > **Add Users**.The **Add Users** dialog box appears.

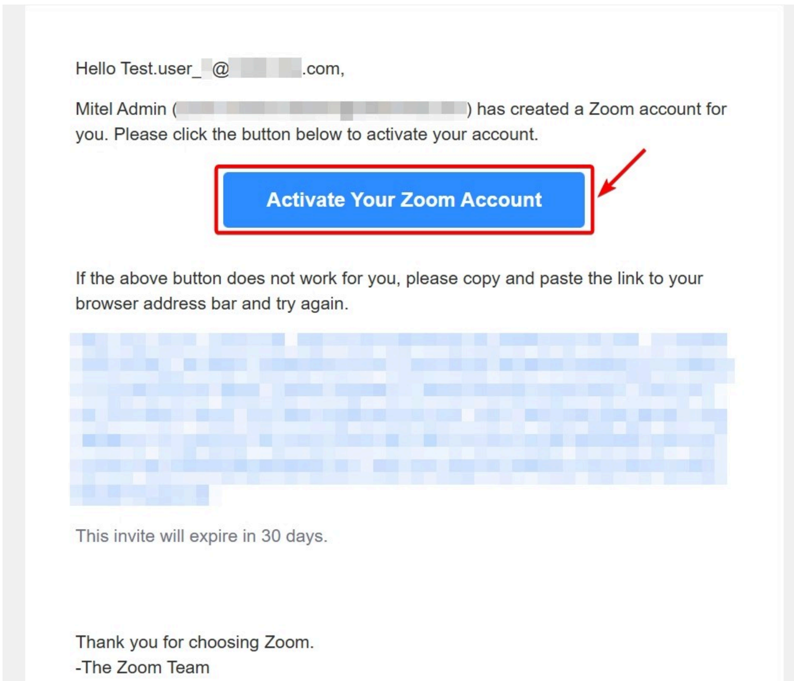


c. Enter the **Email address** and then select **Add**.

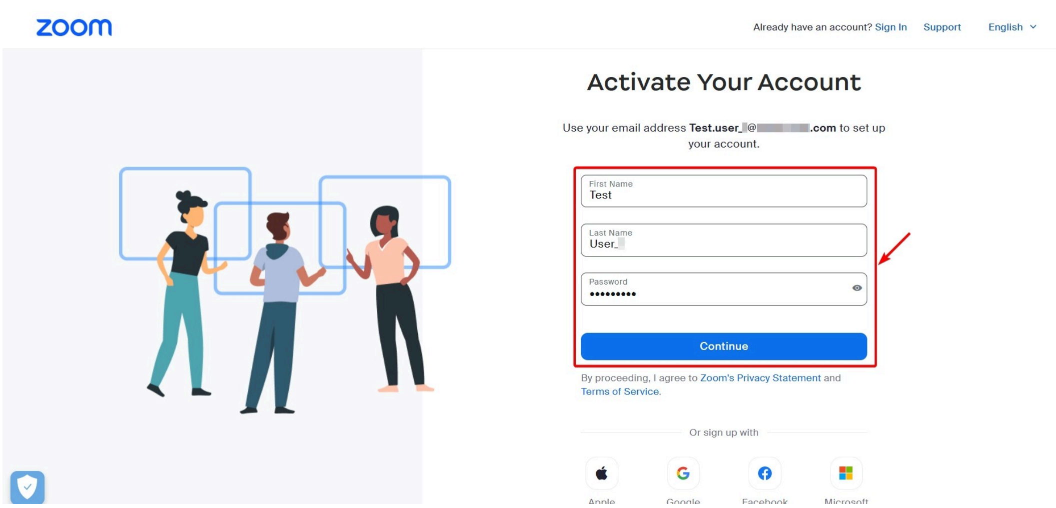
> **Note**:
> Use the same email address that was used for provisioning MiCollab in Mitel Administration.

Note:

- A new user is created, and an activation email is sent to the specified address.
- The user appears in the Pending tab until the account is activated.



d. Select **Activate Your Zoom Account** in the email you received.

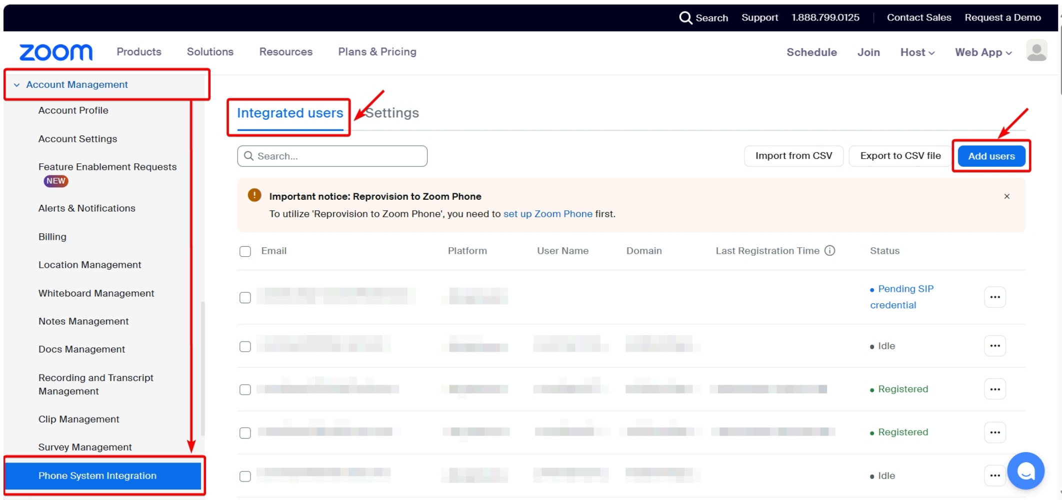


e. Enter the **First Name**, **Last Name**, and a **Password**. Then select **Continue** to activate the account.

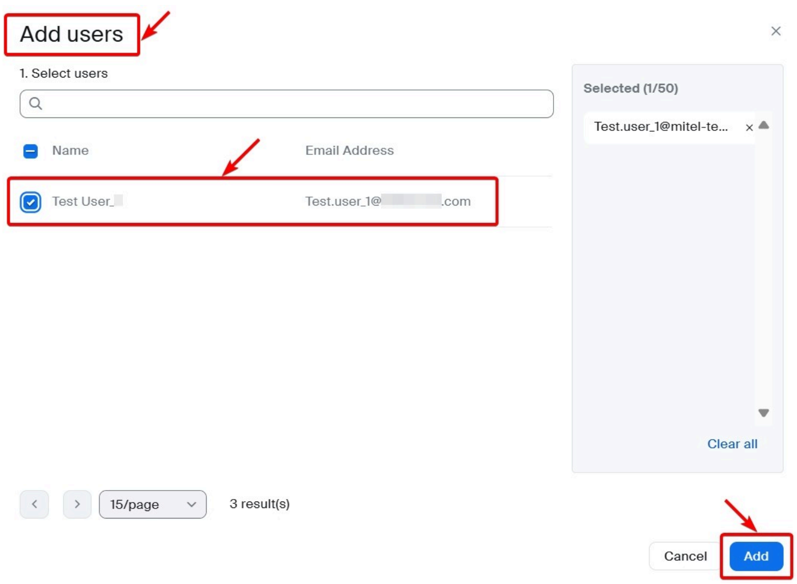
Note:
After activation, the user has a Zoom account but no Zoom Phone assigned.

2. Assign a Zoom Phone to a New User:

a. In the Zoom tenant, navigate to **Account Management** > **Phone System Integration**.



b. Under the **Integrated Users** tab, select **Add Users**.



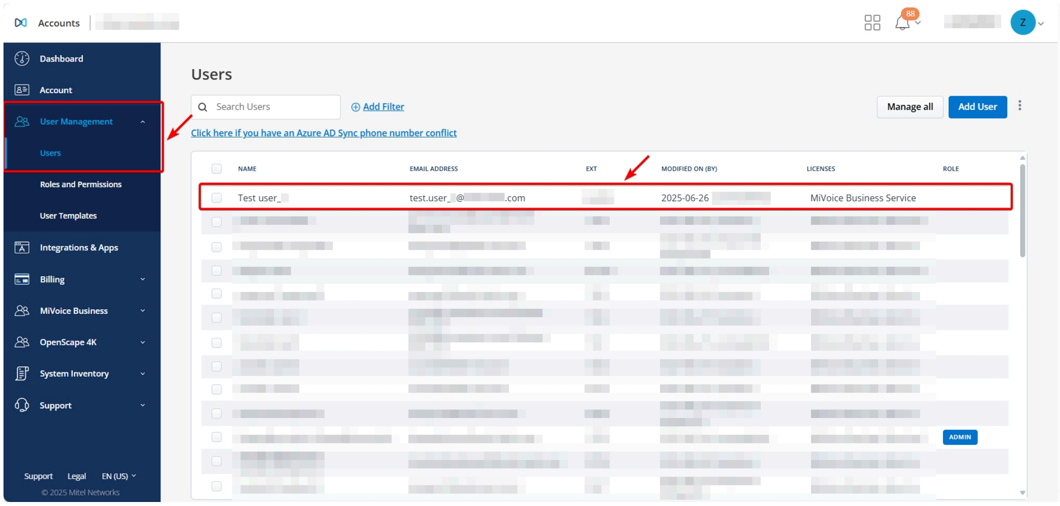
c. Select the user and select **Add**.

Note:
The user has now been assigned Zoom Phone services.

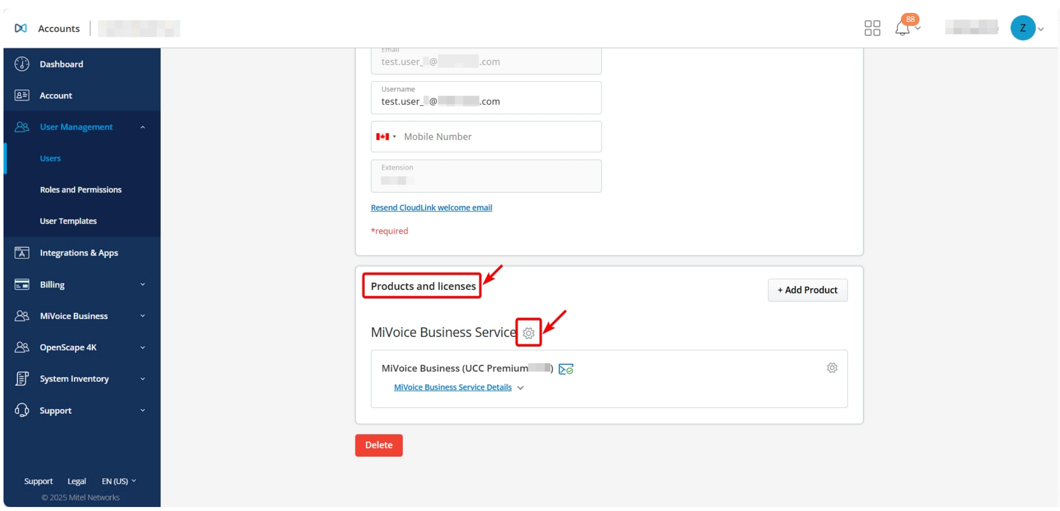
3. Provision the Existing MiCollab User with Zoom Services:

   a. Sign in to Mitel Administration.

   b. Navigate to **User Management** > **Users**.

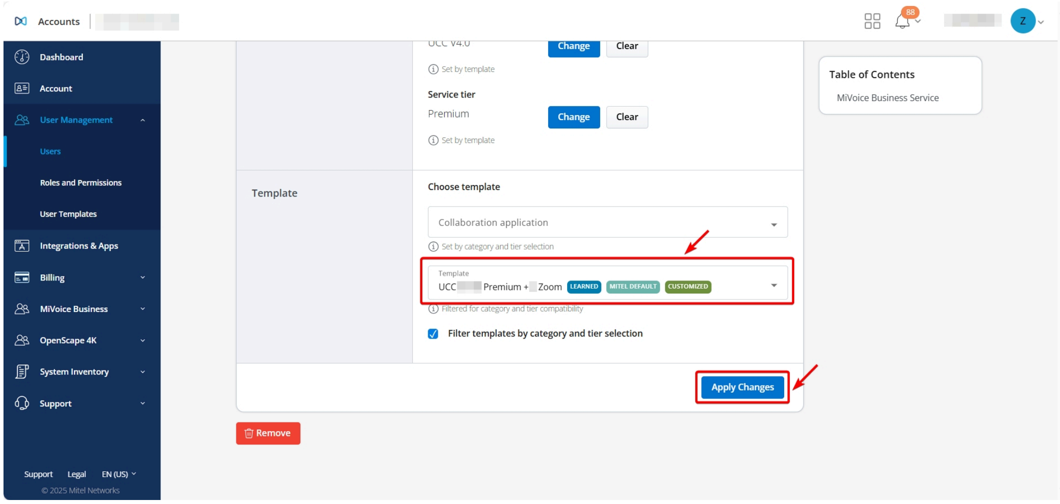


   c. Select the existing user with a MiCollab license who was registered earlier in the Zoom tenant.

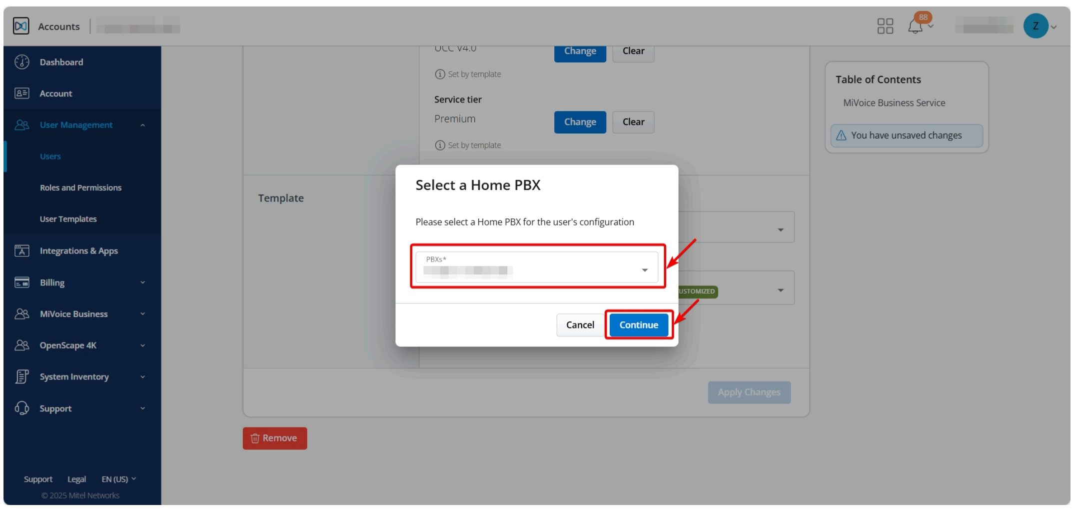


   d. Select the **large gear** icon in the **Products and licenses** section.

   e. From the **Template** drop-down list, select a template that includes Unified Communications and Collaboration (UCC) and Zoom capabilities.

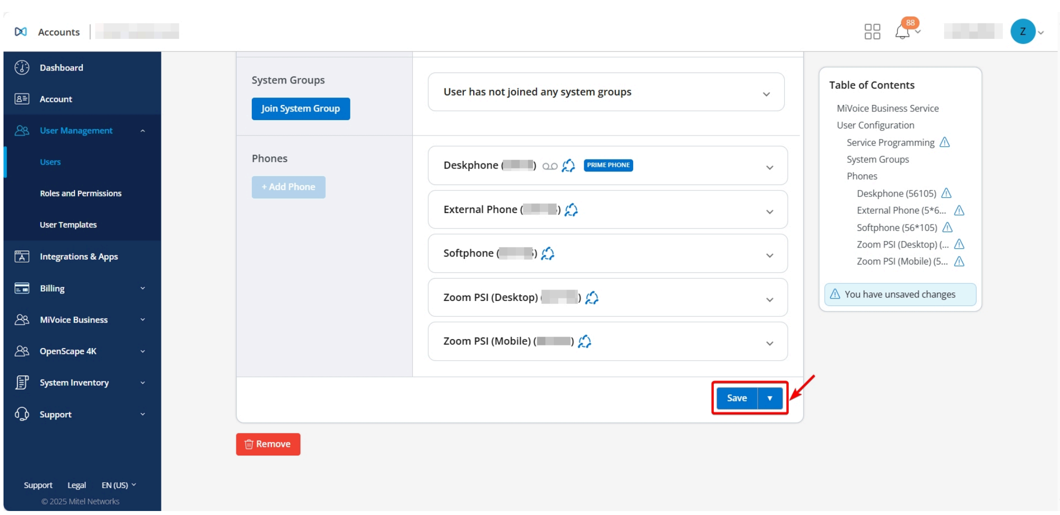


f. Select **Apply Changes**.



g. Select a Home PBX from the drop-down list, and then select **Continue**.

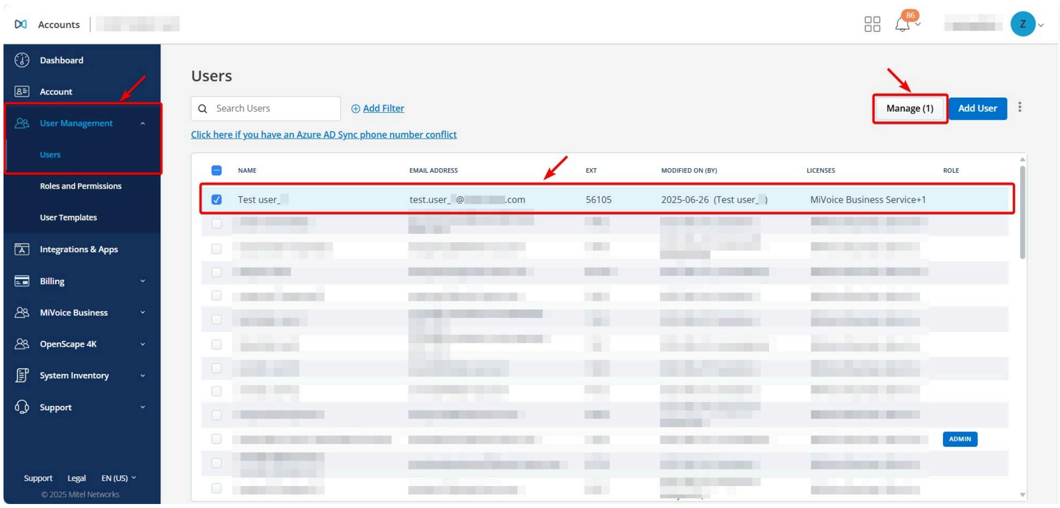
h. Update the fields under the **User Configuration** section if needed, and then select **Save**.



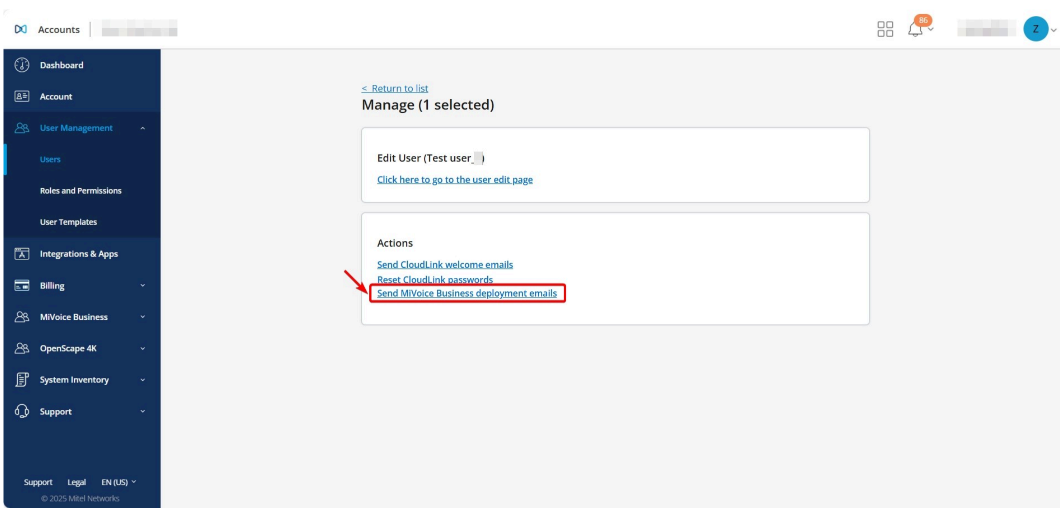
> **Note**:
> The user is now provisioned with MiCollab and Zoom licenses.

4. Send MiVoice Business Deployment and Password Emails:

a. In Mitel Administration, navigate to **User Management** > **Users**.



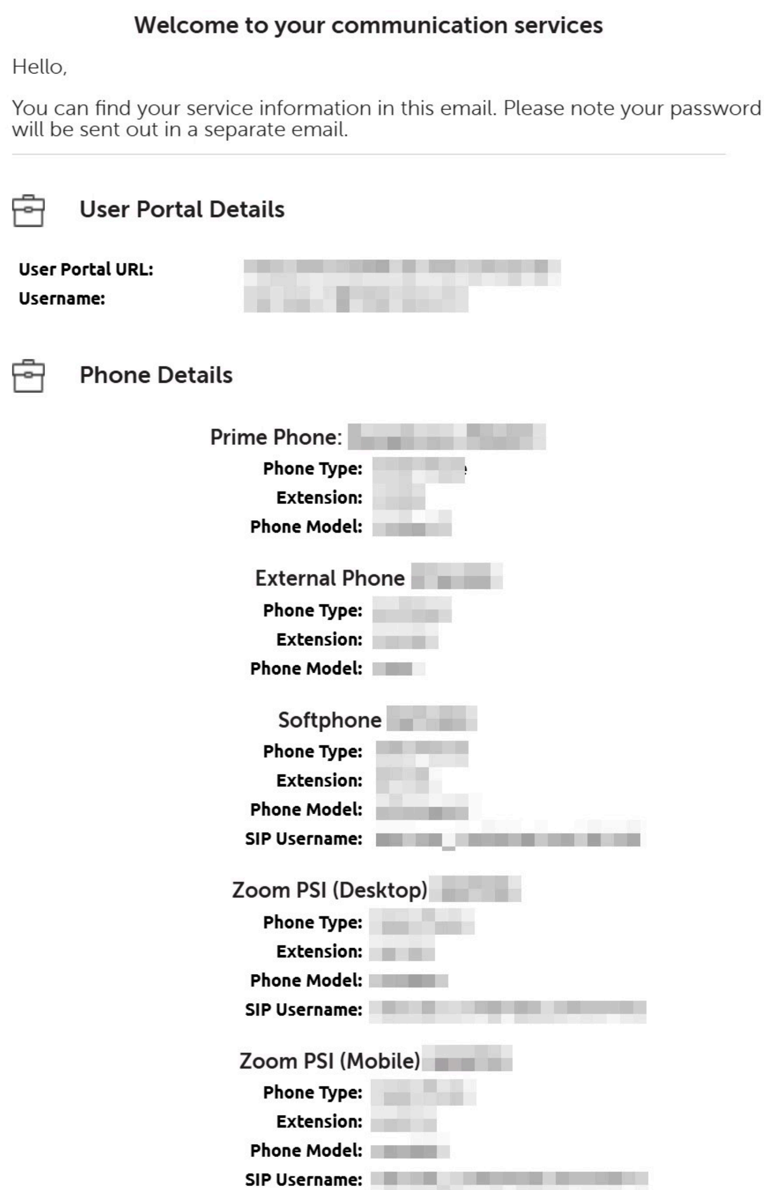
b. Select the newly created user, and then select **Manage**.



c. Select **Send MiVoice Business deployment emails.**

> **Note**:
> The user receives one email with service information and another with the password.

Sample MiVoice Business deployment emails:



Welcome to your communication services

Hello,

You can find your service information in this email. Please note your password will be sent out in a separate email.

User Portal Details

User Portal URL:
Username:

Phone Details

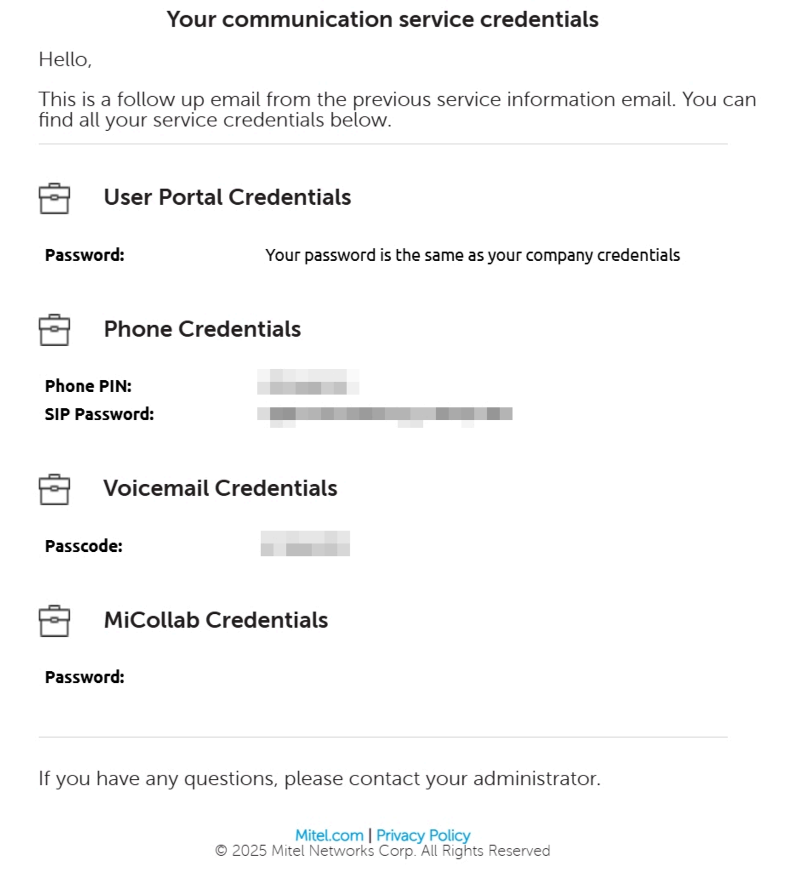
Prime Phone:
Phone Type:
Extension:
Phone Model:

External Phone
Phone Type:
Extension:
Phone Model:

Softphone
Phone Type:
Extension:
Phone Model:
SIP Username:

Zoom PSI (Desktop)
Phone Type:
Extension:
Phone Model:
SIP Username:

Zoom PSI (Mobile)
Phone Type:
Extension:
Phone Model:
SIP Username:



Your communication service credentials

Hello,

This is a follow up email from the previous service information email. You can find all your service credentials below.

User Portal Credentials

Password: Your password is the same as your company credentials

Phone Credentials

Phone PIN:

SIP Password:

Voicemail Credentials

Passcode:

MiCollab Credentials

Password:

If you have any questions, please contact your administrator.

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> **Note**:
> For detailed instructions on configuring the MiCollab Client after Zoom provisioning, refer to the ***Using Zoom PSI with MiCollab Client End User Guide***.

9.3.1.1.1 Updating a User Template to Include Zoom Phone with MiCollab

Use this procedure to update a user template imported from MiCollab and add Zoom Phone integration.

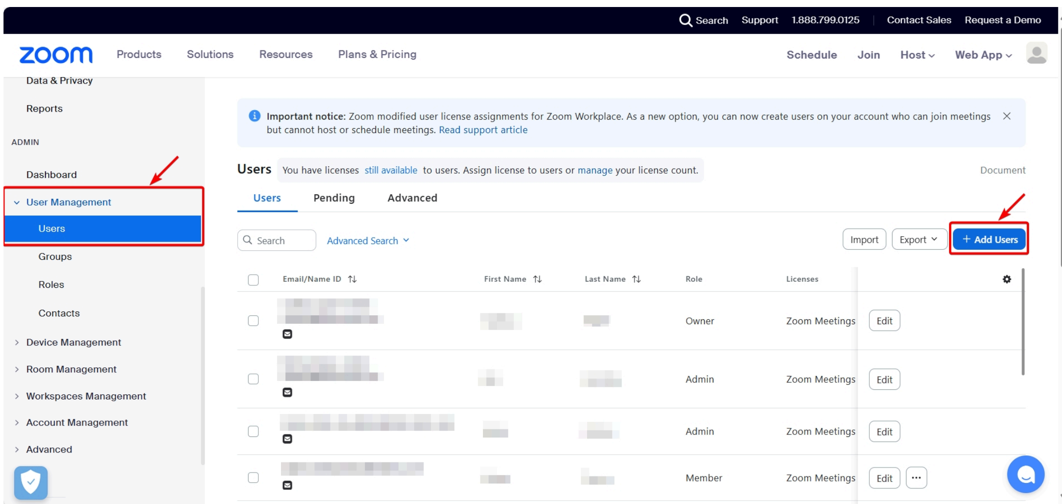
1. In **Mitel Administration**, go to **User Management** > **User Templates**.
2. Locate the template tagged as **Learned** that was imported from MiVoice Business and includes MiCollab.
3. Select the template and click **Save As New Template**.
4. Enter a new name for the template (Example: UCC Premium + Zoom).
5. Open the newly created template.
6. Update the **Template Name** (if needed).
7. Scroll to the **Phones** section and click **Add Phone**.

8. In the **Select a Phone** dialog box:
    - Choose **Zoom Phone System Integration**.
    - Click **Add**.
9. Click **Save** to update the template.

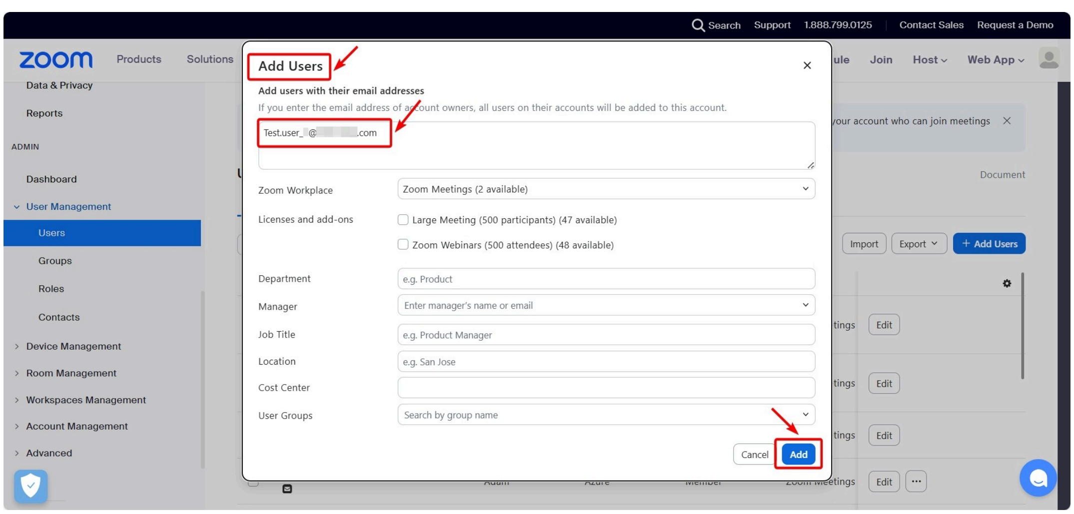
9.3.1.2 Add Phone Method

This method describes how to manually provision Zoom Phone services for existing MiCollab users by adding a Zoom Phone through the user's profile in Mitel Administration. It involves creating and activating a Zoom user, assigning a Zoom Phone, and updating the user's configuration using the Add Phone option in the MiCollab interface.

1. Create and Activate a New Zoom User:
    a. Sign in to the Zoom tenant as an admin user.



    b. Navigate to **User Management** > **Users** > **Add Users**.The **Add Users** dialog box appears.

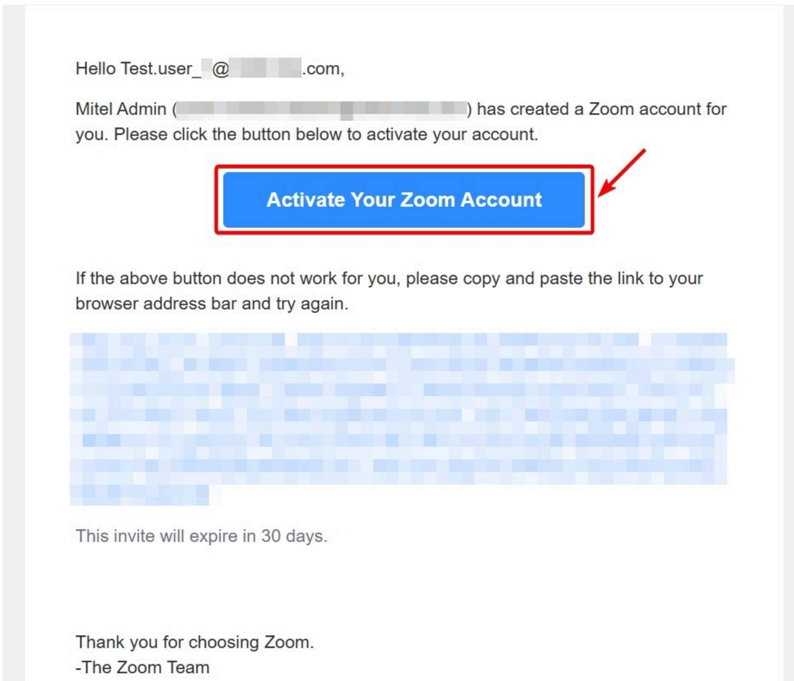


    c. Enter the **Email address** and then select **Add**.

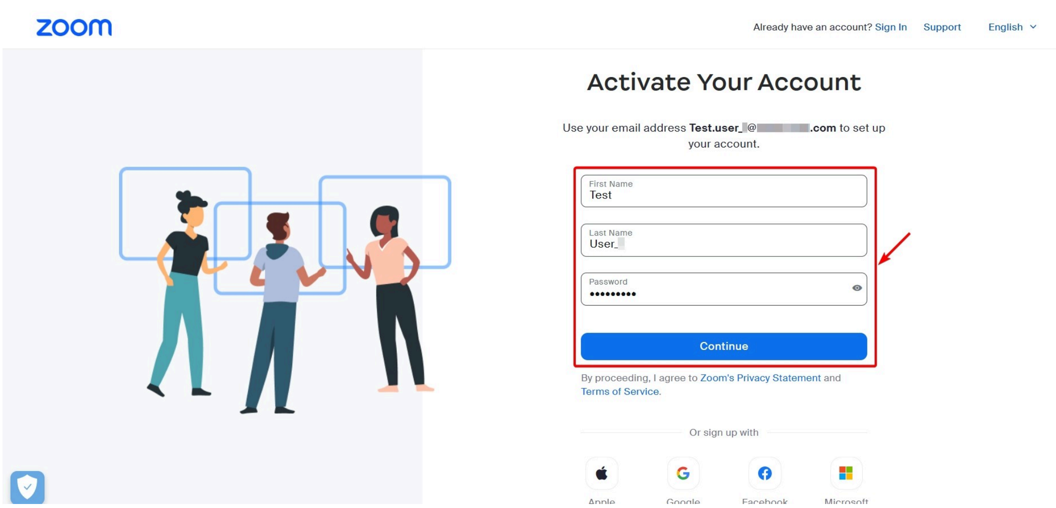
Note:
Use the same email address that was used for provisioning MiCollab in Mitel Administration.

Note:

- A new user is created, and an activation email is sent to the specified address.
- The user appears in the Pending tab until the account is activated.



d. Select **Activate Your Zoom Account** in the email you received.

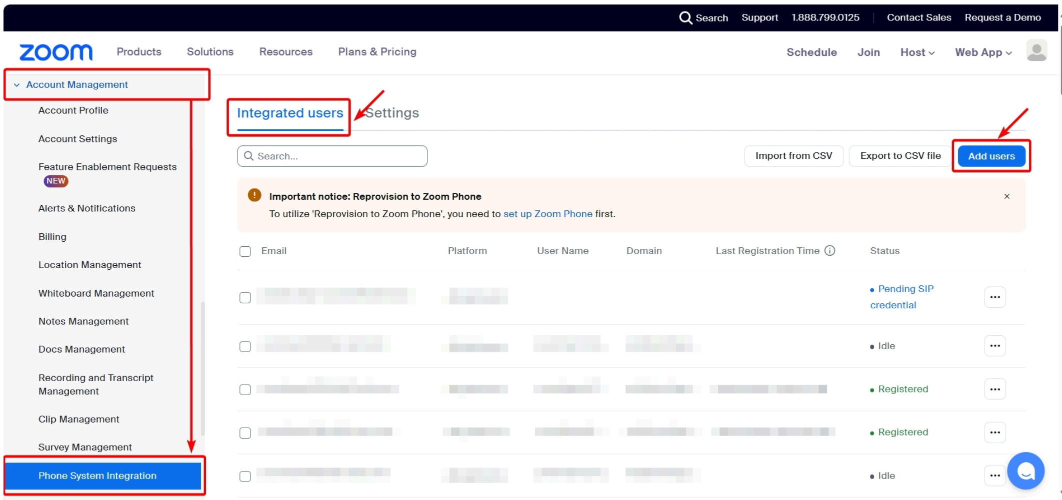


e. Enter the **First Name**, **Last Name**, and a **Password**. Then select **Continue** to activate the account.

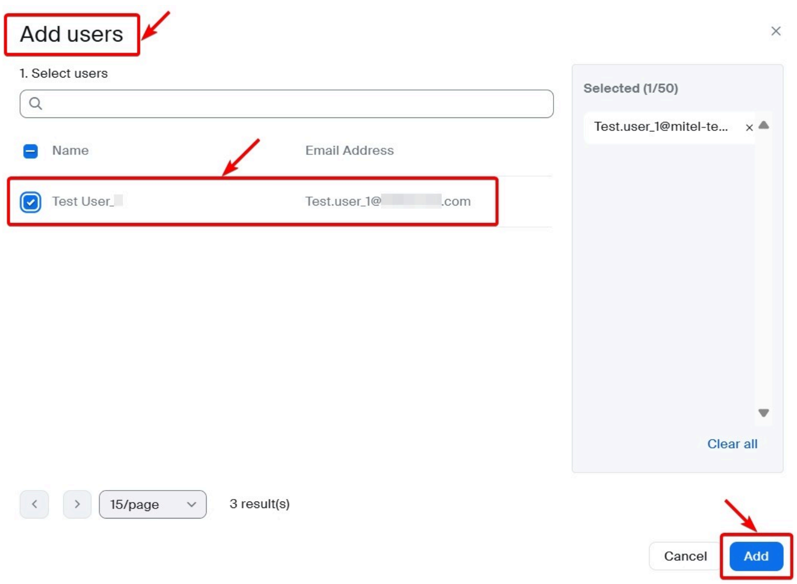
Note:
After activation, the user has a Zoom account but no Zoom Phone assigned.

2. Assign a Zoom Phone to a New User:

a. In the Zoom tenant, navigate to **Account Management** > **Phone System Integration**.



b. Under the **Integrated Users** tab, select **Add Users**.



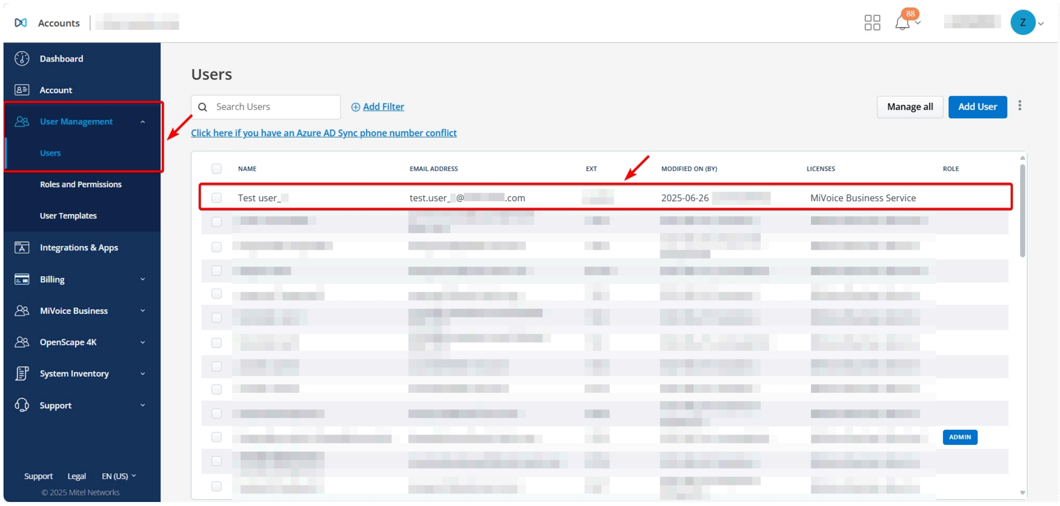
c. Select the user and select **Add**.

Note:
The user has now been assigned Zoom Phone services.

3. Provision the Existing MiCollab User with Zoom Services.

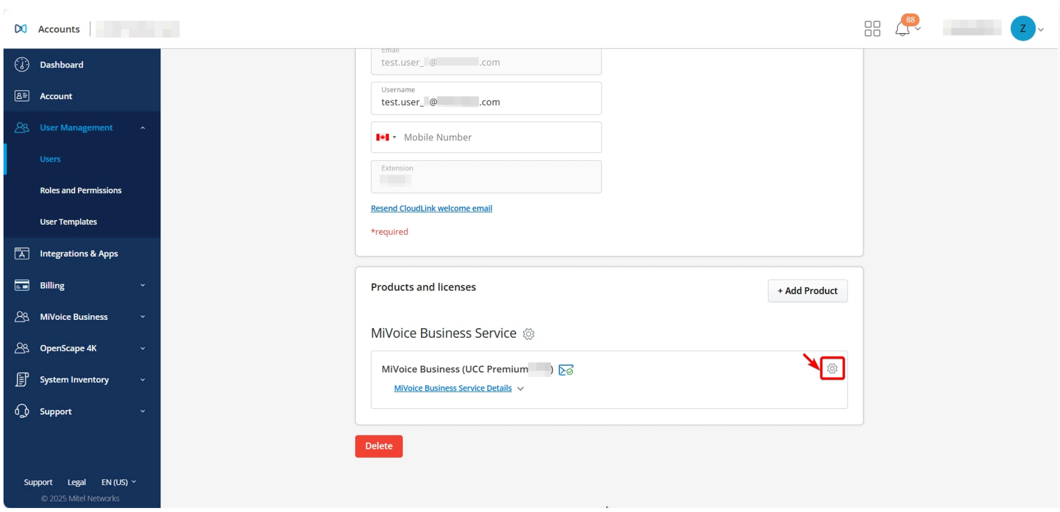
   a. Sign in to Mitel Administration.

   b. Navigate to **User Management** > **Users**.

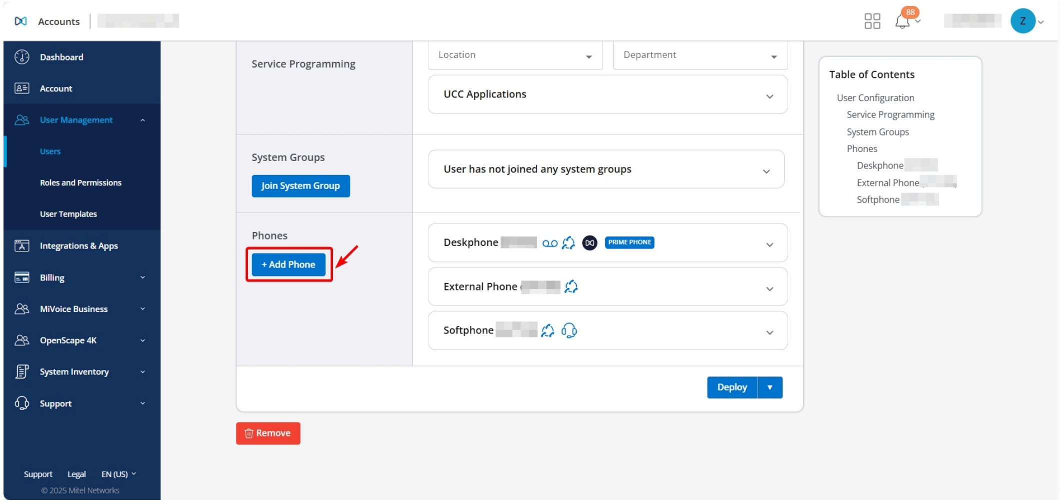


   c. Select the existing user with a MiCollab license who was registered earlier in the Zoom tenant.

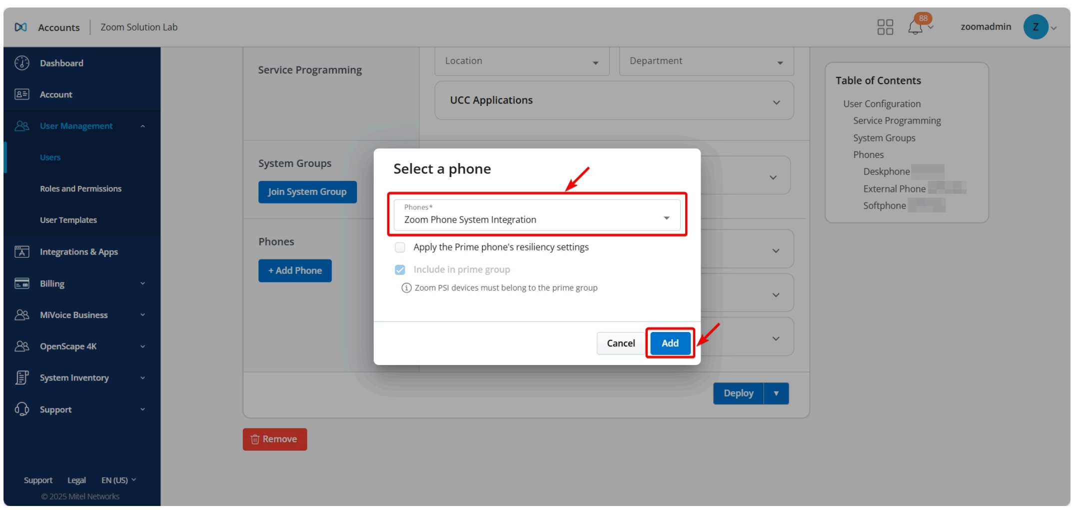
   d. Select the **small gear** icon next to the existing licenses.



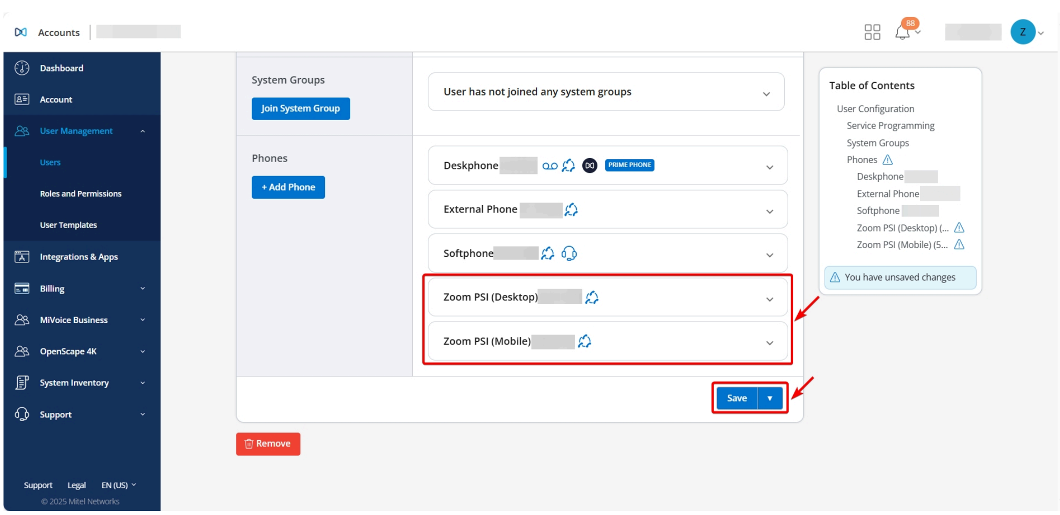
   e. Select **Add Phone**.



The **Select a Phone** dialog box appears.



f. From the drop-down list, select **Zoom Phone System Integration**, and then select **Add**.

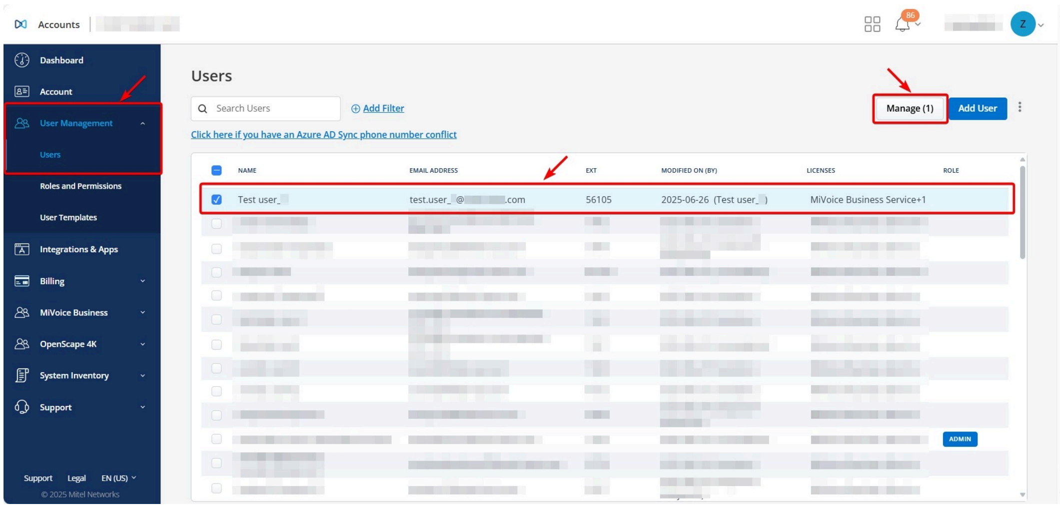


g. Select **Save**.

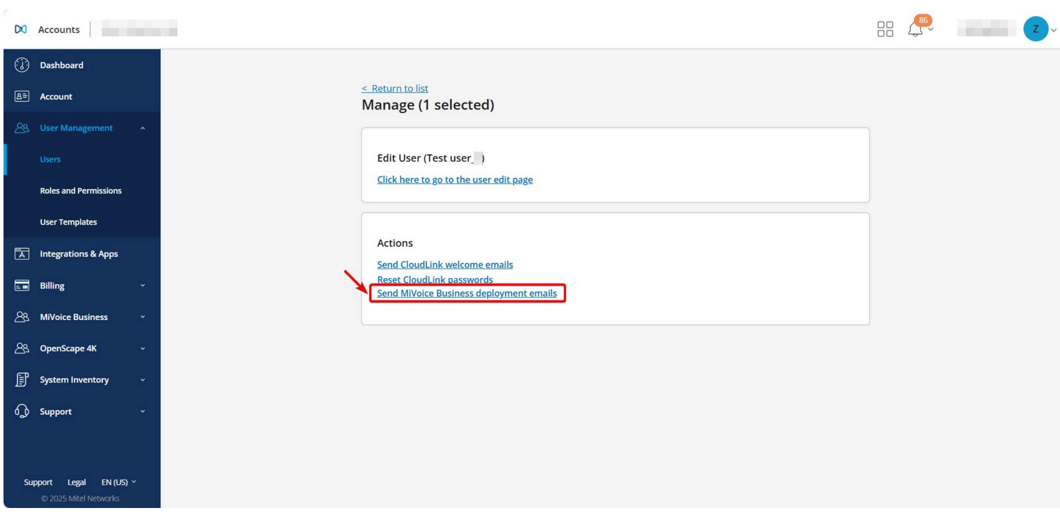
> **Note**:
> The user is now assigned the Zoom Phone in Mitel Administration.

4. Send MiVoice Business Deployment and Password Emails:

a. In Mitel Administration, navigate to **User Management** > **Users**.



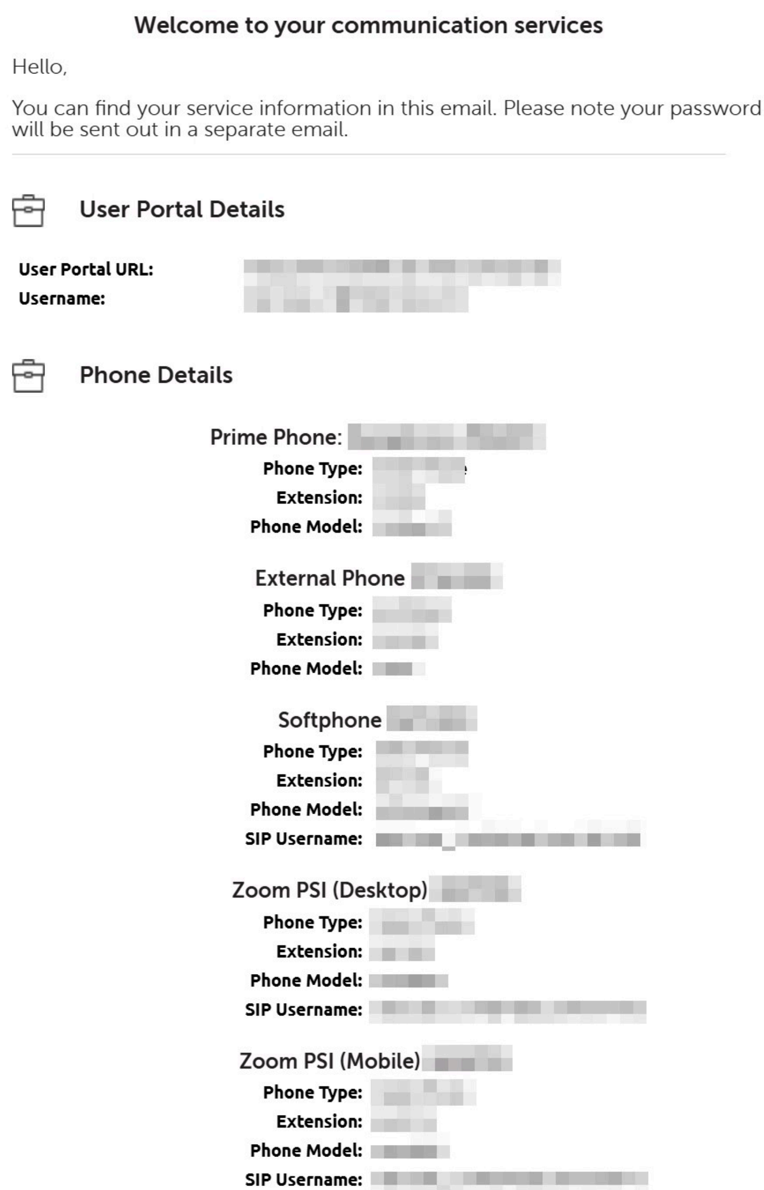
b. Select the newly created user, and then select **Manage**.



c. Select **Send MiVoice Business deployment emails.**

Note:
The user receives one email with service information and another with the password.

Sample MiVoice Business deployment emails:



Welcome to your communication services

Hello,

You can find your service information in this email. Please note your password will be sent out in a separate email.

User Portal Details

User Portal URL:
Username:

Phone Details

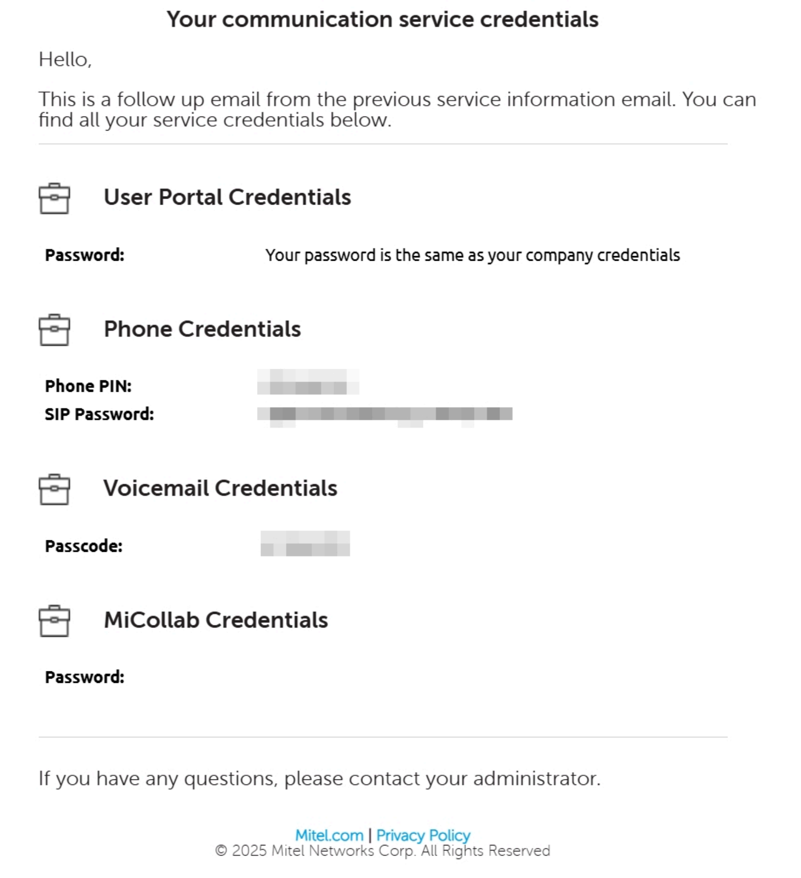
Prime Phone:
Phone Type:
Extension:
Phone Model:

External Phone
Phone Type:
Extension:
Phone Model:

Softphone
Phone Type:
Extension:
Phone Model:
SIP Username:

Zoom PSI (Desktop)
Phone Type:
Extension:
Phone Model:
SIP Username:

Zoom PSI (Mobile)
Phone Type:
Extension:
Phone Model:
SIP Username:



Your communication service credentials

Hello,

This is a follow up email from the previous service information email. You can find all your service credentials below.

User Portal Credentials

Password: Your password is the same as your company credentials

Phone Credentials

Phone PIN: [redacted]
SIP Password: [redacted]

Voicemail Credentials

Passcode: [redacted]

MiCollab Credentials

Password:

If you have any questions, please contact your administrator.

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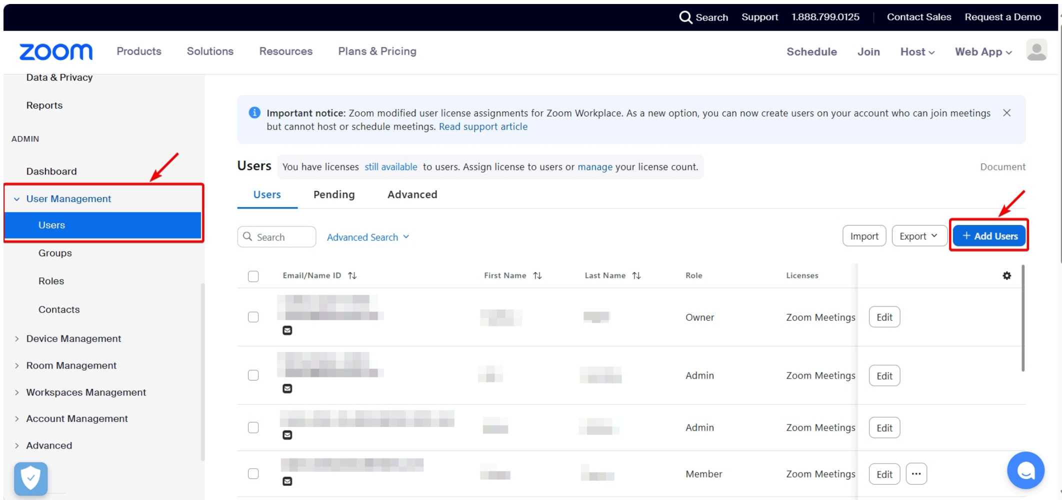
> **Note**:
> For detailed instructions on configuring the MiCollab Client after Zoom provisioning, refer to the ***Using Zoom PSI with MiCollab Client End User Guide***.

9.3.2 Onboarding a New User with MiCollab and Zoom Phone Integration

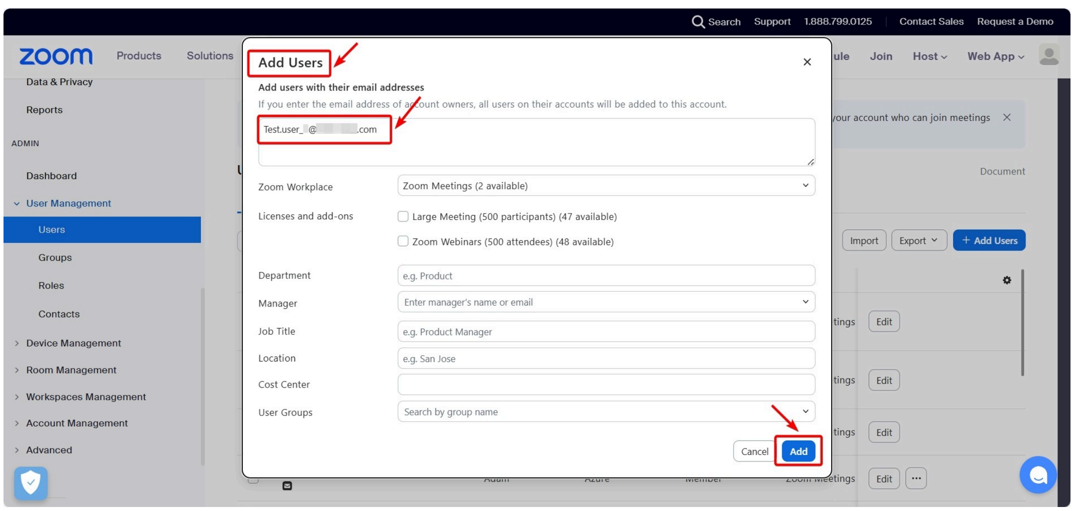
This procedure outlines the steps to onboard a new user with MiCollab and Zoom Phone integration. It includes creating a Zoom user, assigning a Zoom Phone, and provisioning the user through Mitel Administration to enable Unified Communications and Collaboration (UCC) and Zoom service.

1. Create and Activate a New Zoom User Account:

   a. Sign in to the Zoom tenant as an admin user.

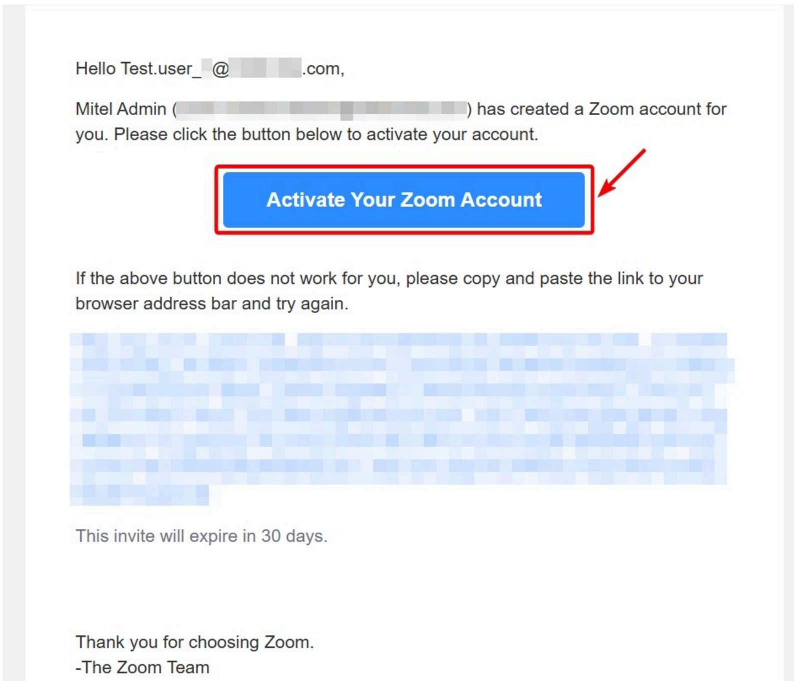


   b. Navigate to **User Management** > **Users** > **Add Users**. The **Add Users** dialog box appears.

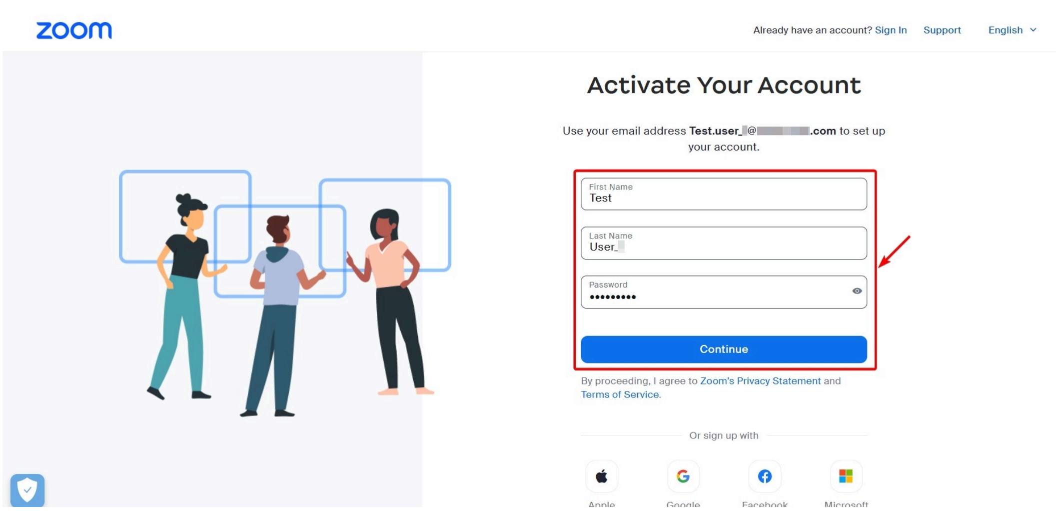


   c. Enter the **Email address** and then select **Add**.

> **Note**:
> - A new user is created, and an activation email is sent to the specified email address.
> - The user appears in the **Pending** tab until the account is activated.



d. Select **Activate Your Zoom Account** in the email you received.

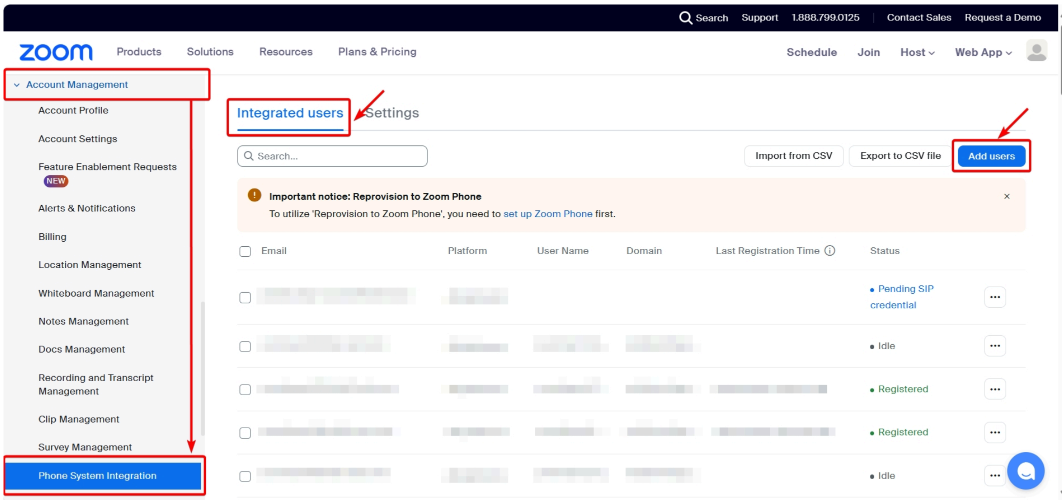


e. Enter the **First Name**, **Last Name**, and a **Password**. Then select **Continue** to activate the account .

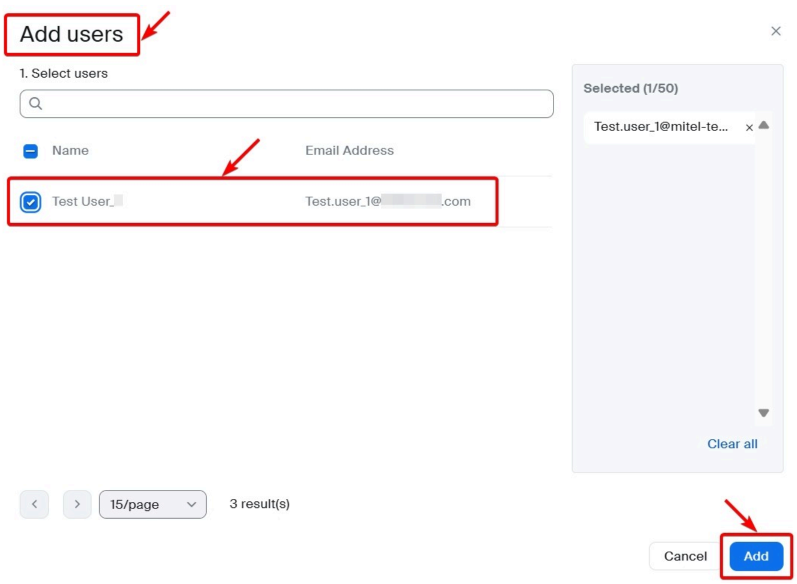
Note:
After activation, the user has a Zoom account but no Zoom Phone assigned.

2. Assign a Zoom Phone to a New User:

a. In the Zoom tenant, navigate to **Account Management** > **Phone System Integration**.



b. Under the **Integrated Users** tab, select **Add Users**.

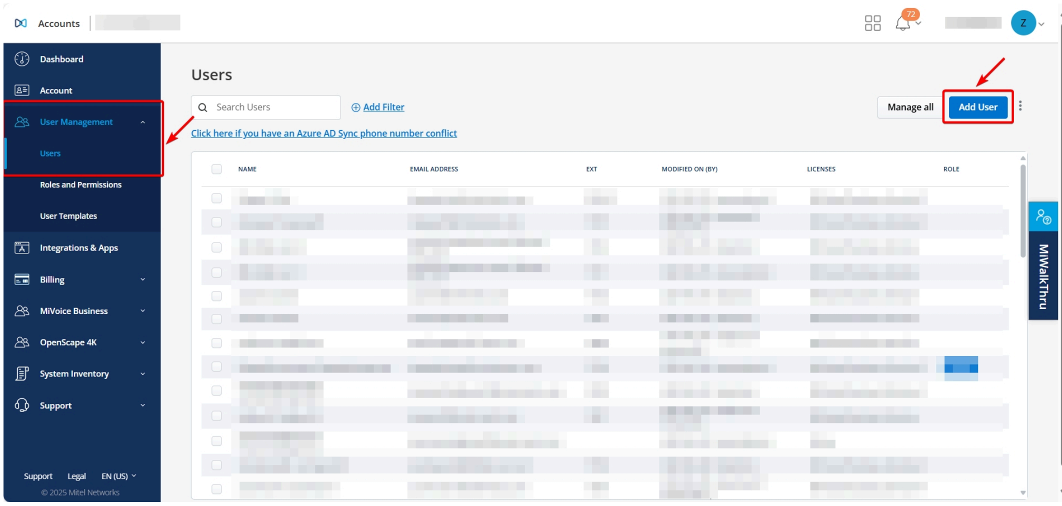


c. Select the user and select **Add**.

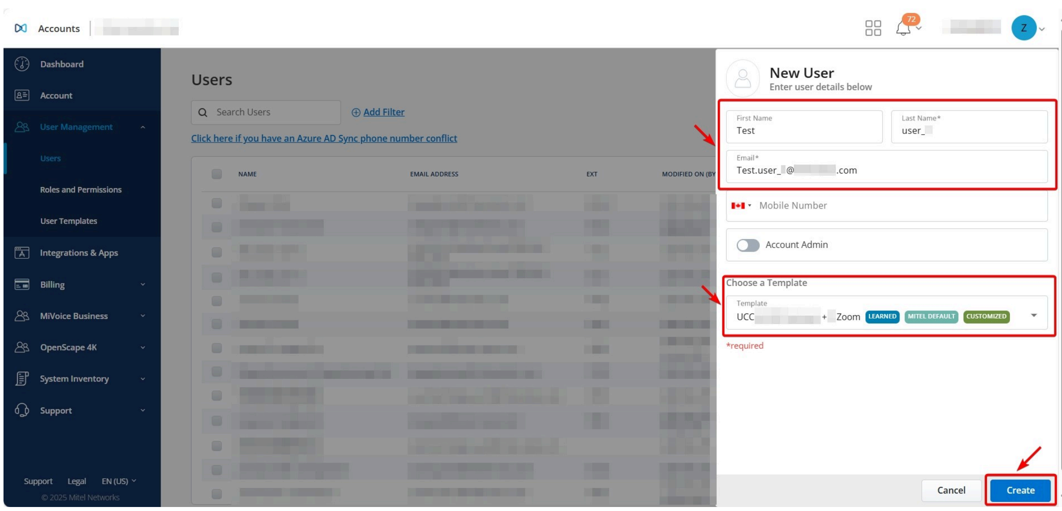
Note:
The user has now been assigned Zoom Phone services.

3. Provisioning a New User in Mitel Administration with MiCollab and Zoom Services:

a. Sign in to Mitel Administration.



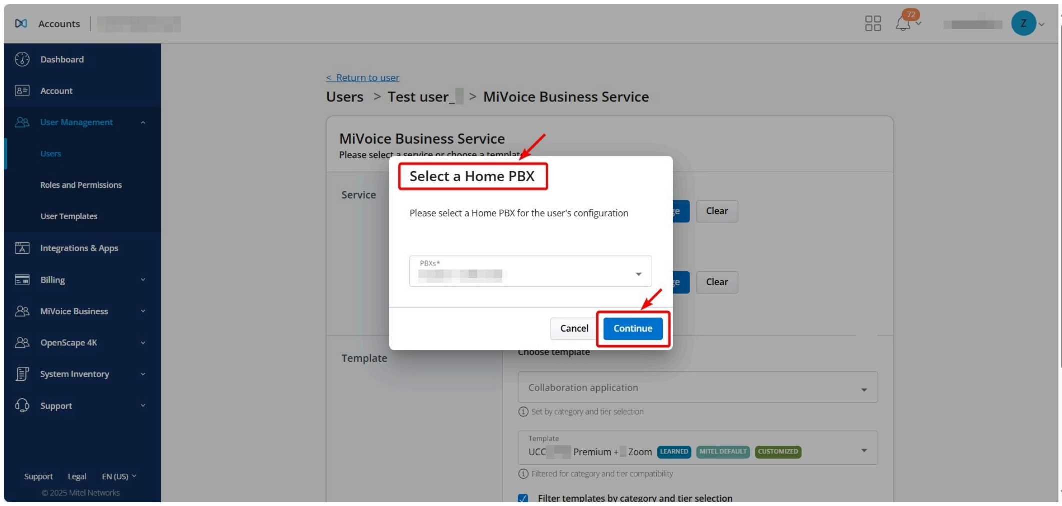
b. Navigate to **User Management** > **Users** > **Add User**.



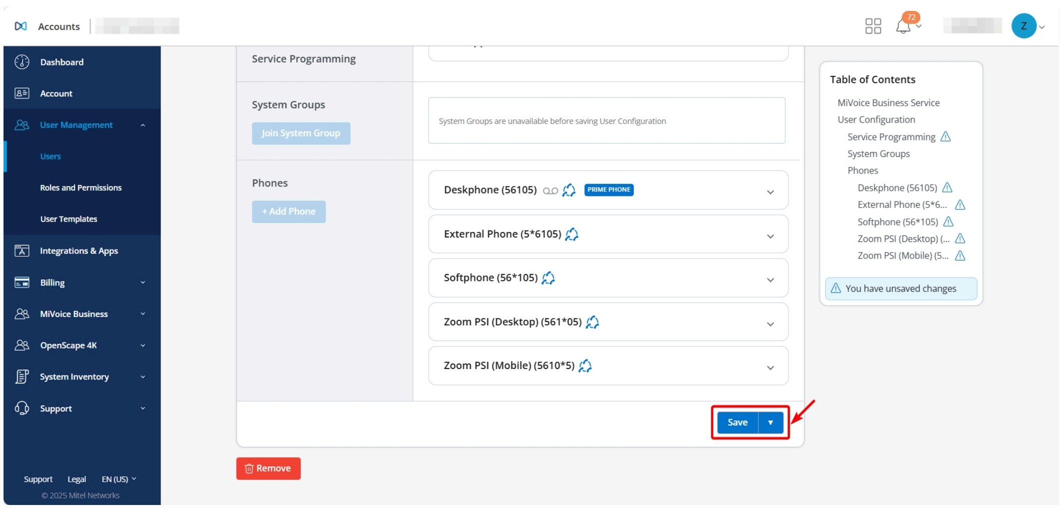
c. Enter the **First name** , **Last name** , and **Email ID**.

d. **Choose a template** with the Unified Communications and Collaboration (UCC) and Zoom capabilities.

e. Select **Create**. The user is created, and the configuration screen appears.



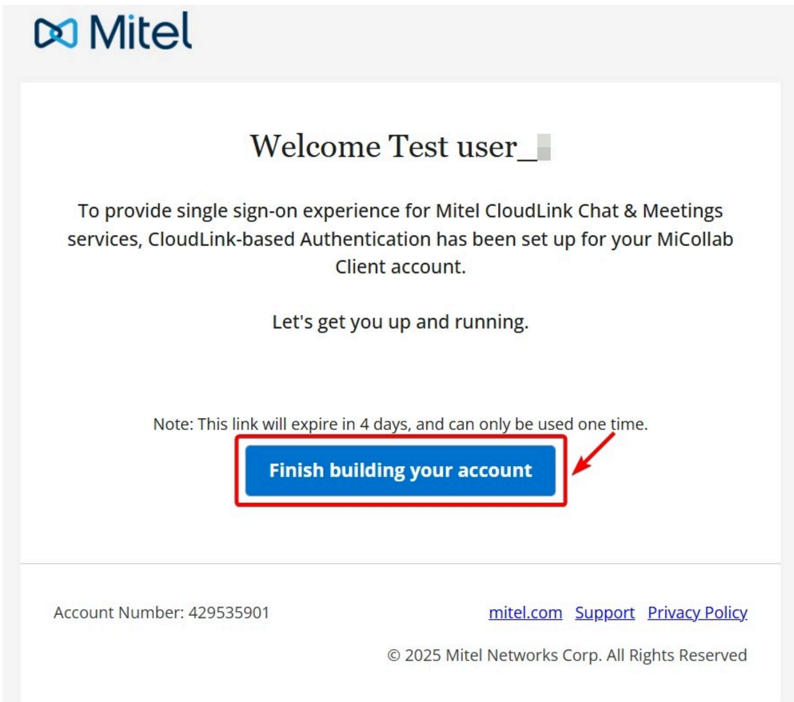
f. Select a Home PBX from the drop-down and select **Continue**.



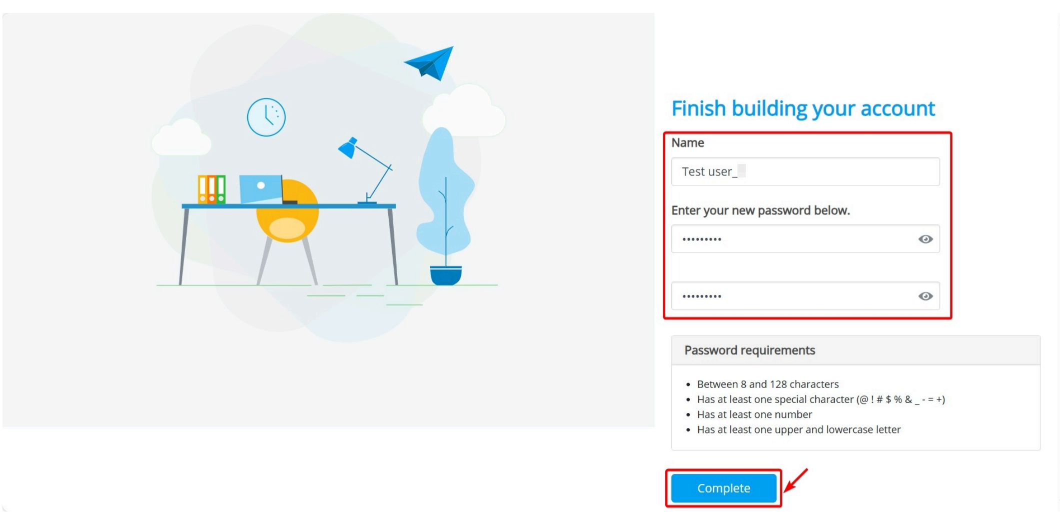
g. Update the fields under the **User Configuration** section if needed, and then click **Save**.

> **Note**:
>
> - The user is now provisioned with MiCollab and Zoom licenses.
> - An email is sent to the user with instructions to configure MiCollab.

h. Select **Finish building your account**#in the email you received.

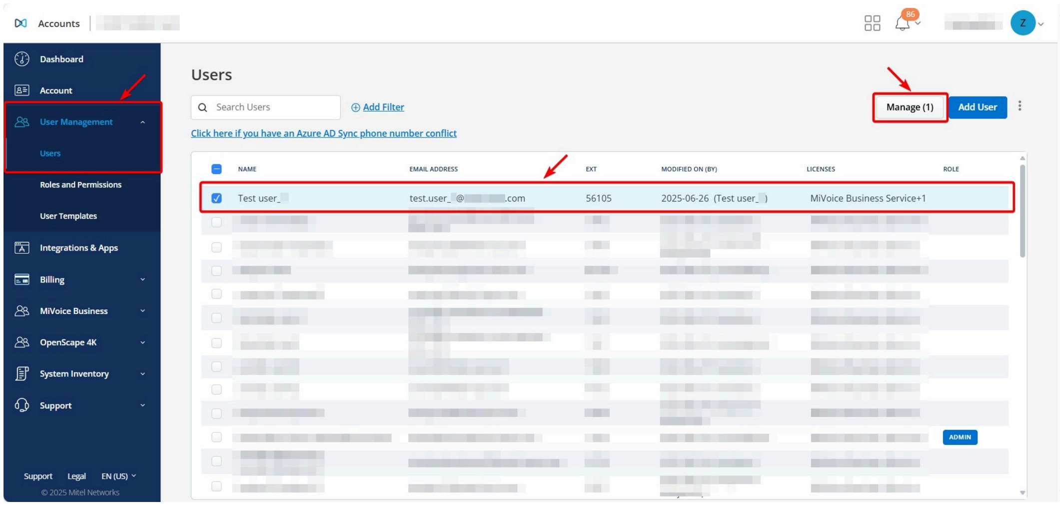


i. Complete the MiCollab account setup by entering the user's **Name** and **Password**. Then select **Complete**.

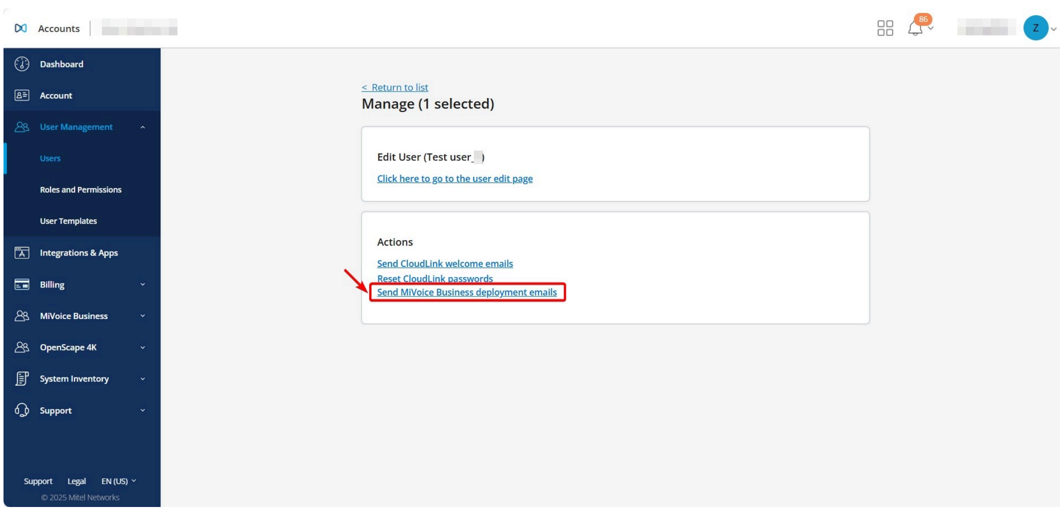


4. Send MiVoice Business Deployment and Password Emails:

a. In Mitel Administration, navigate to **User Management** > **Users**.



b. Select the newly created user, and then select **Manage**.



c. Select **Send MiVoice Business deployment emails.**

> **Note**:
> The user receives one email with service information and another with the password.

Sample MiVoice Business deployment emails:

Welcome to your communication services

Hello,

You can find your service information in this email. Please note your password will be sent out in a separate email.

User Portal Details

User Portal URL:
Username:

Phone Details

Prime Phone:
Phone Type:
Extension:
Phone Model:

External Phone
Phone Type:
Extension:
Phone Model:

Softphone
Phone Type:
Extension:
Phone Model:
SIP Username:

Zoom PSI (Desktop)
Phone Type:
Extension:
Phone Model:
SIP Username:

Zoom PSI (Mobile)
Phone Type:
Extension:
Phone Model:
SIP Username:

Your communication service credentials

Hello,

This is a follow up email from the previous service information email. You can find all your service credentials below.

User Portal Credentials

Password: Your password is the same as your company credentials

Phone Credentials

Phone PIN: [redacted]
SIP Password: [redacted]

Voicemail Credentials

Passcode: [redacted]

MiCollab Credentials

Password:

If you have any questions, please contact your administrator.

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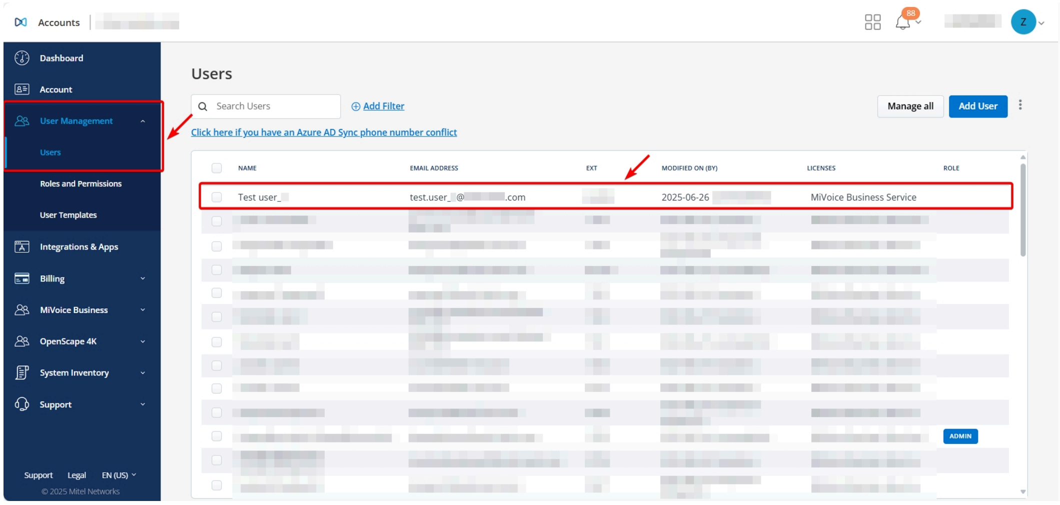
> **Note**:
> For detailed instructions on configuring the MiCollab Client after Zoom provisioning, refer to the ***Using Zoom PSI with MiCollab Client End User Guide***.

9.3.3 Removing Zoom Phone Service from a User with MiCollab and Zoom Integration

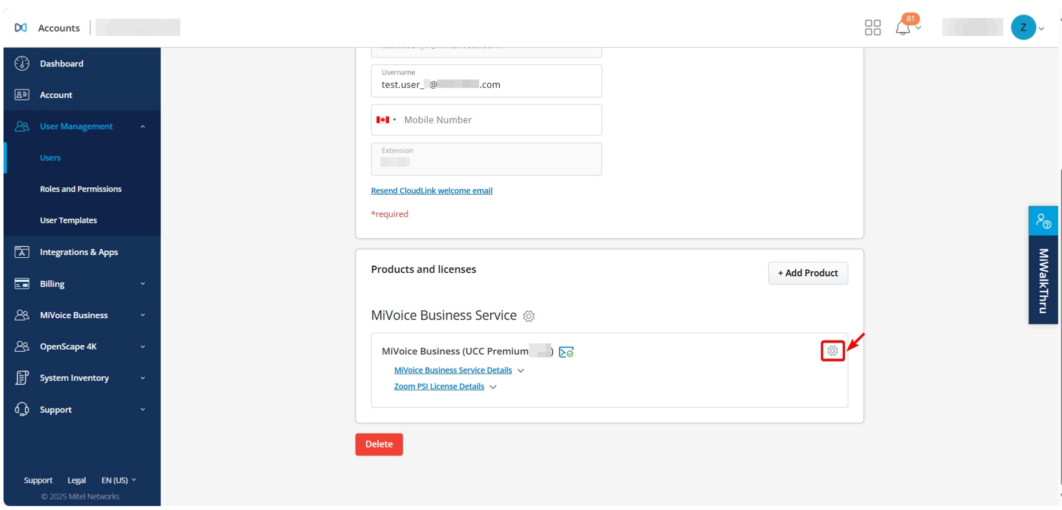
This procedure outlines the steps to remove Zoom Phone (PSI) services from a user who is currently provisioned with both MiCollab and Zoom. This action is typically performed when transitioning the user to a MiCollab-only configuration.

1. Sign in to Mitel Administration.

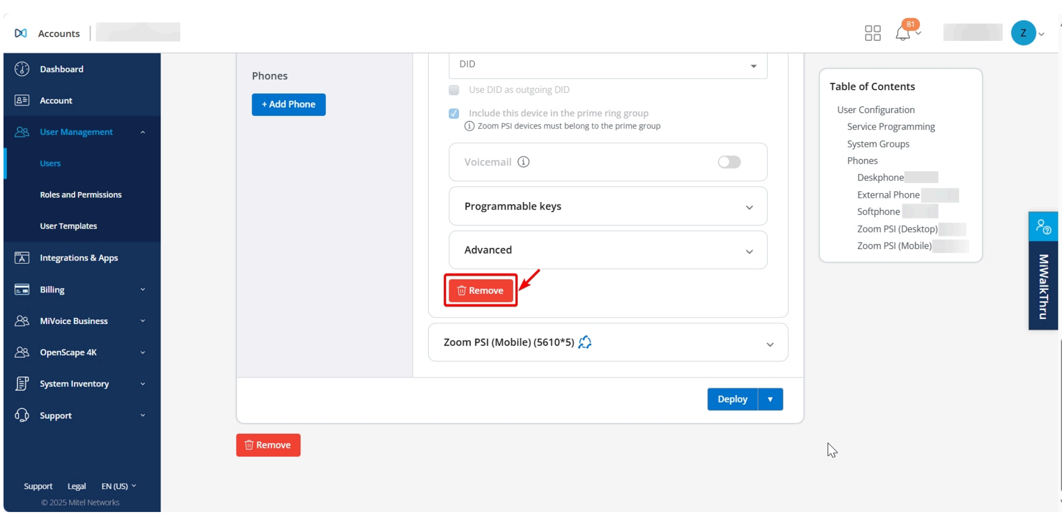
2. Navigate to **User Management** > **Users**.



3. Select the existing user who is provisioned with both MiCollab and Zoom licenses.
4. Select the **small gear** icon next to the existing licenses.



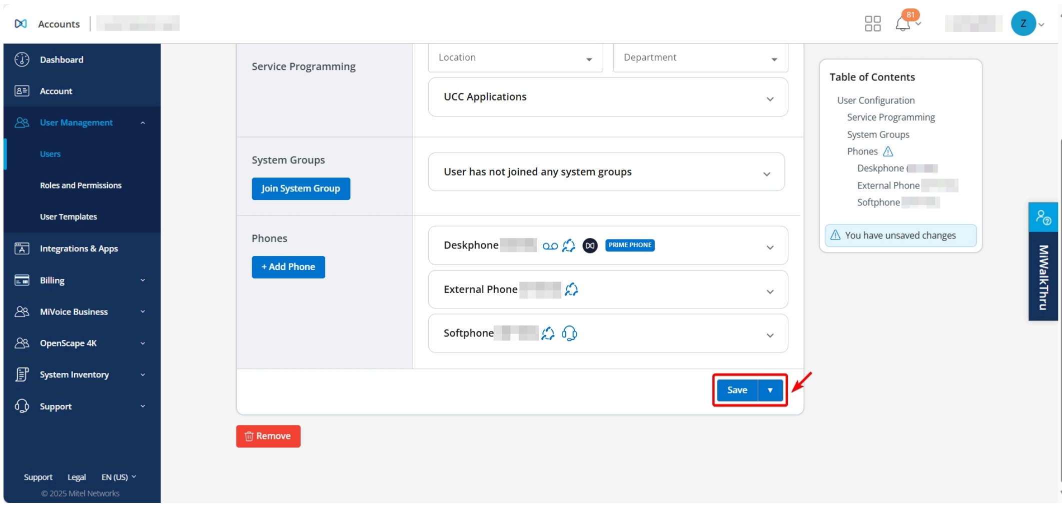
5. Select either **Zoom PSI (Desktop)** or **Zoom PSI (Mobile)** from the list of devices.



6. Select **Remove**. The **Remove Both Zoom PSI Devices** dialog box appears, select **Remove** again.

> **Note**:
> Removing either **Zoom PSI (Desktop)** or **Zoom PSI (Mobile)** will remove both devices from the user profile.

7. Select **Save**.



The user is now deprovisioned from Zoom Phone services and retains only MiCollab capabilities.

Monitoring and Troubleshooting Zoom Integration in Mitel CloudLink Admin Portal 10

This chapter contains the following sections:

- Viewing the Zoom integration status
- Generating a User Comparison Report
- Troubleshooting common issues identified in the User Comparison Report
- Viewing the Event History table (Zoom integration).

10.1 Viewing the Zoom integration status

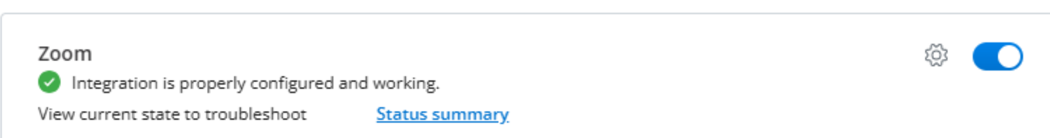
Once the Zoom integration is added to a customer account, you can check its status to ensure it is set up properly. The Zoom integration can have one of the following statuses:

- `Connected`
- `Error`
- `Pending`

Viewing a summary of the Zoom integration status

To view a summary of the Zoom integration status, follow the steps below:

1. Access the **Integrations** panel from the **Accounts Information** page or from the **Integrations & Apps** option.
2. In the **Integrations** panel, locate the **Zoom** integration. Check the status icon and message next to it.



The icon indicates the current status of the integration, while the status message provides additional information about the overall status.

Viewing detailed information about the Zoom integration status

For a more in-depth view of the Zoom integration status, especially for troubleshooting, you can one of the following:

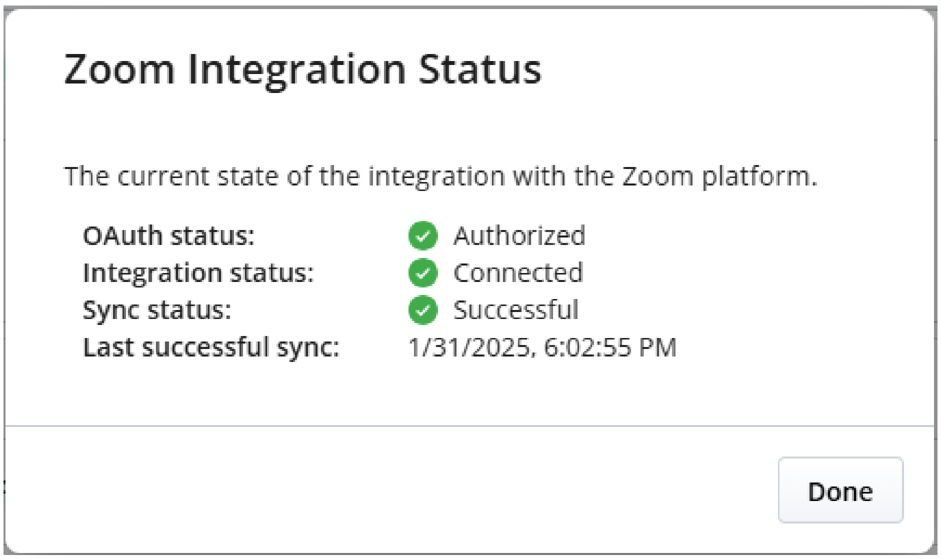
- Click **Status summary** next to the **Zoom** integration in the **Integrations** panel.

- Navigate to **Support** > **Zoom**.

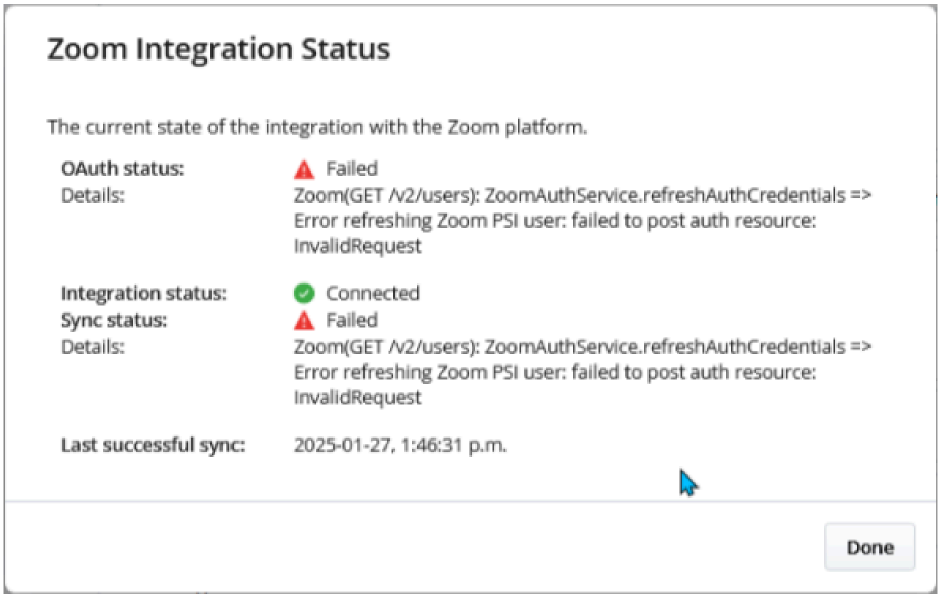
You can then view detailed information about the Zoom integration status, including the following:

- **OAuth status**: Displays the OAuth authorization status (`Authorized`, `Failed`), indicating whether the Zoom OAuth token is valid, expired, or needs re-authorization. If the OAuth status is `Failed`, error messages associated with the most recent OAuth failure will also be displayed below the status.
- **Integration status**: Indicates the current status of the Zoom integration (`Connected`, `Error`, or `Pending`).
- **Sync status**: Indicates the synchronization status between CloudLink and Zoom. If the last sync was unsuccessful, error messages associated with the most recent failed sync attempt will also be displayed below the status.
- **Last successful sync**: Date and time of the last successful synchronization between CloudLink and Zoom.

The following image shows an example of detailed information about the Zoom integration status when the integration is set up properly.



The following image shows an example of detailed information about the Zoom integration status when the integration is not set up properly.



In the second example, as shown in the details section below the failed **OAuth status** and **Sync status**, an error occurred while attempting to obtain a new refresh token from Zoom.

Refreshing the Zoom integration status

To refresh the Zoom integration status, follow the steps below:

1. Navigate to **Support** > **Zoom**.
2. In the **Status** tab, click **Refresh**.

10.2 Generating a User Comparison Report

The User Comparison Report analyzes user data across multiple systems to identify inconsistencies. It consolidates user information from four sources, using the email address as the unique identifier:

- CloudLink User Database (CL User DB)
- Service Delivery License Database
- Zoom User List
- Zoom Phone List

The User Comparison Report helps identify mismatches and missing data that may impact the proper provisioning of services.

You can generate and download a report comparing users' information between Zoom and CloudLink.

1. Log in to Mitel Administration as an Account Admin.
2. Click **Support > Zoom** from the left main menu.
   The Zoom Sync & Provisioning Errors page of the customer account opens.

3. Select the **User Comparison Report** tab.
4. Click **Generate** to compare users' information between Zoom and CloudLink.

   The system initiates an asynchronous request for generating the report.

   A report is generated in a csv format.
5. Click **Download** next to the csv file.

The User Comparison Report contains the following information:

Field	Description
email	The primary identifier.
name	User's display name.
clUserId	The user's ID in CloudLink (if found).
licenses	Assigned licenses (e.g., ["ZoomPSI"]).
zmUserId	The user's ID in Zoom (if found).
zmUserStatus	The current status of the user in Zoom (active, inactive, pending).
zmSipPhoneId	The ID of the user's assigned Zoom desktop client SIP phone (if found).
zmSipPhoneNumber	The assigned Zoom desktop client SIP phone number.
zmSipPhoneMobileId	The ID of the user's assigned Zoom mobile SIP phone (if found).
zmSipPhoneMobileNumber	The assigned Zoom mobile phone number.
issues	A list of identified inconsistencies.

10.3 Troubleshooting common issues identified in the User Comparison Report

If any issue is identified in the User Comparison Report, it is recorded in the issue column of the User Comparison Report.

Below are the potential issues and the recommended resolution:

Issue	Cause	Resolution
CloudLinkUserNotFound	The user is not found in the CloudLink User Database.	Ensure the user is provisioned in CloudLink. Verify that their email address is correct.
ZoomUserNotFound	The user does not exist in Zoom.	Confirm that the user has been added to the Zoom tenant. Verify the email address that is used.
ZoomSipPhoneNotFound	The user does not have a Zoom SIP phone assigned.	Assign a SIP phone to the user in the Zoom Admin Portal.
ZoomUserStatusInactive	The user's Zoom status is inactive.	Reactivate the user in the Zoom Admin Portal.
ZoomUserStatusPending	The user's Zoom status is pending activation.	Ensure the user completes the activation process by following the Zoom invite email.
NoClZoomPsiLicense	The user does not have the required "ZoomPSI" license in CloudLink.	Assign the "ZoomPSI" license to the user in the management Portal. If this issue is detected, no further checks are performed.

Steps to Validate and Fix Issues

1. Open the User Comparison Report.
2. Locate users with issues in the issues column.
3. Identify the corresponding inconsistency from the list above.
4. Follow the resolution steps for each detected issue.
5. After making corrections, regenerate the report to verify the fixes.

If the issues persist after resolving them, contact the appropriate system administrator for further investigation.

Note:
If a user does not have a "ZoomPSI" license, no further checks are performed.

Note:
Email addresses must match exactly across all sources for proper data joining.

10.4 Viewing the Event History table (Zoom integration).

The Event History provides insight to Mitel Partners and Account Admins regarding events that occurred within an account with Zoom integration.

1. Log in to Mitel Administration as an Account Admin.
2. Click **Support > Zoom** from the left main menu.
   The **Zoom Sync & Provisioning Errors** page of the customer account opens.
3. Select the **Event History** tab.
4. Click on an event in the Event History table to view the event details.
   The **Event Details** popup window is displayed.
5. Click Copy to copy the event details of the following tabs:
   - **Core details**
   - **Properties Changed**
   - **Extra Details**
   - **Log tags**
6. Click **Export** to export all data in a csv format.

Note:
Actions performed in Mitel Administration will only appear in the Event History after a 24-hour delay. This delay is expected and does not indicate a failure or issue with the action itself.

Configuring E911 Calls 11

This chapter contains the following sections:

This chapter provides information on the necessary configurations to ensure that the E911 solution can successfully determine the physical location of a registered user during an emergency call. Once the exact location is identified, the E911 solution routes the E911 call to the appropriate Public Safety Answering Point (PSAP) and notifies security personnel.

E911 Solutions must comply with E911 legislation. The Federal Communications Commission (FCC) developed Kari's Law and the RAY BAUM's Act, which comprise a set of rules and regulations that specify direct dialing, notification, and dispatchable location minimum requirements for all Multi-line Telephone System (MLTS) platforms. All organizations across the US must comply with both Kari's Law and the RAY BAUM's Act.

MiVB, as a Multi-line Telephone System (MLTS), implements Section 506 of RAY BAUM Act and Kari´s Law support in conjunction with third-party Next Generation of 911 emergency services providers in the USA.

For MiVB, we have the following device categories:

- Fixed MLTS Devices. For example, Analog Devices TDM devices (Analog Devices, Digital Devices, and Integrated DECT).
- Non-Fixed MLTS devices. For example, IP Devices, SIP Devices, softphones, all teleworkers, and so on.

To fully support the requirements above, MiVB is integrated with Intrado in USA and with Redsky in USA and Canada. A valid service agreement with either RedSky or Intrado is necessary for the E911 Solution.

> **Note**:
> Mitel does not provide this service agreement directly. To support local notifications compliant with Kari's law compliant, the solution will use the E911 Provider's notification application.

RedSky and Intrado use SIP trunks to route E911 calls to the appropriate Public Safety Answering Points (PSAPs) based on the civic address. Both providers pass callback information from the call-server to enable the PSTN to route the call back from the PSAP to the specified callback number.

> **Note**:
> Intrado also offers a function called Extension bind for non-DID numbers. This function, when enabled, assigns a temporary valid Direct Inward Dialing (DID) callback number for the extension number (non 10-digits number) that made the 911 call. In this case, if the call gets disconnected the Emergency Response Team can call back the person that called the Emergency Service.

Emergency Call Flow

Emergency calls are **only supported** from the **Zoom desktop client**. If you attempt to place an emergency call from the **Zoom mobile client**, the call will automatically be redirected to the mobile cellular network.

Additionally, the emergency location is provided by RedSky. The process for retrieving the emergency location is as follows:

- When a user logs into the Zoom desktop client, Zoom sends a request to CloudLink.
- CloudLink, using the Emergency Provider information, forwards the request to RedSky to retrieve the user's emergency location.

11.1 CloudLink E911 Configuration

For CloudLink Emergency configurations, refer to Configuring the PBX system Settings settings section.

11.2 Adding IP Range Mapping (Redsky)

You have an administrator account from your Emergency provider (Redsky).

1. Log in to your Redsky account.
2. Select **Network Discovery** from the left-side Configuration menu.

   The **Network Discovery** page is displayed.
3. Go to the **IP Ranges** tab.
4. Click **Add IP Range Mapping** at the top right of the **Network Discovery** page to add the IP Range mapping configurations.
5. Configure the following fields as required:
   - Range Start
   - Range End
   - Building
   - Location
   - Description

   Note:

   If the Building or Location you want to select does not appear in the dropdown, you must add it as a new Building or Location entry.

6. Click **Save**.

   For more information, refer to the Redsky Online Help page.

Note:

The IP range created should be mapped with an E911 location created in the Redsky portal.