



Zoom Contact Center

CoreAccess+ Installation Guide

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1. Introduction

- 1.1. Zoom is the leader in modern enterprise video communications, with an easy, reliable cloud platform for video and audio conferencing, collaboration, chat, and webinars across mobile devices, desktops, and telephones.

- 1.2. CoreAccess+ is a middleware application developed by MNET, LLC that integrates Zoom's contact center capabilities with your organization's core systems — including Jack Henry (Symitar/Ease, Silverlake), FIS, Fiserv, Corelation, CRMs, and others. Through pre-defined APIs, CoreAccess+ enables real-time data exchange between Zoom and your core system, powering features such as member authentication, screen pop, balance inquiry, funds transfer, and fraud management across voice, chat, and IVR conversation flows.

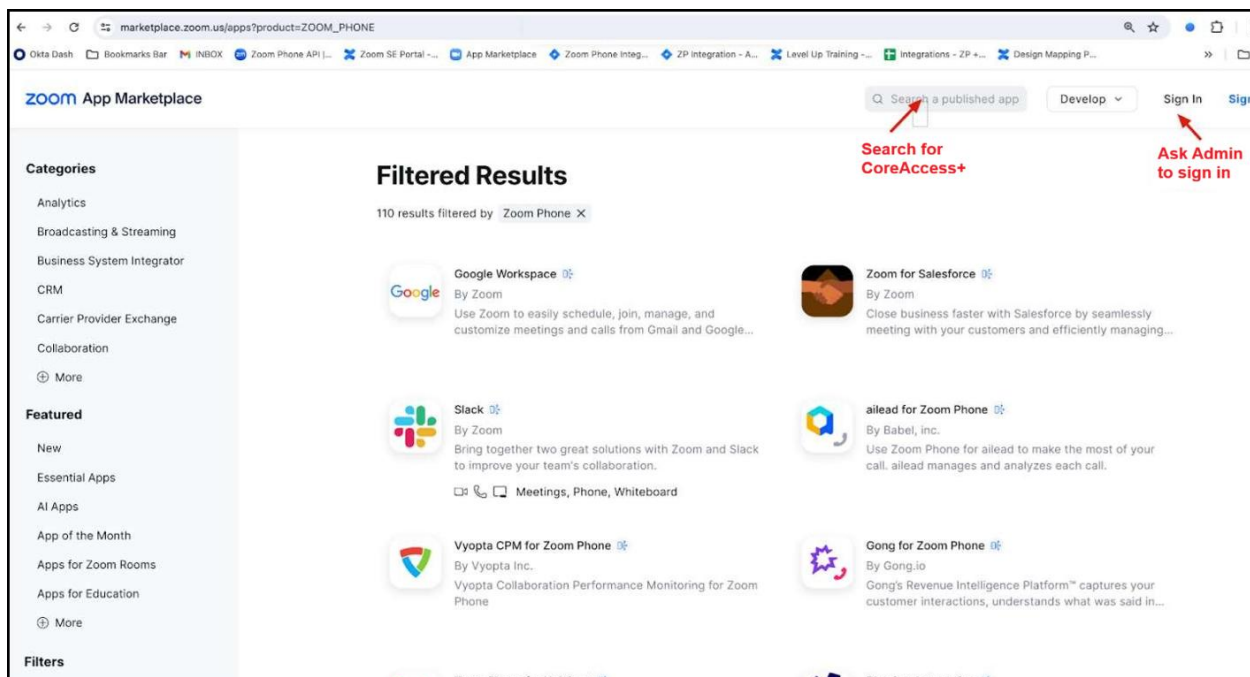
This document will guide you through the installation and configuration of the CoreAccess+ application as a Zoom Administrator.

2. Zoom Contact Center – Installing CoreAccess+

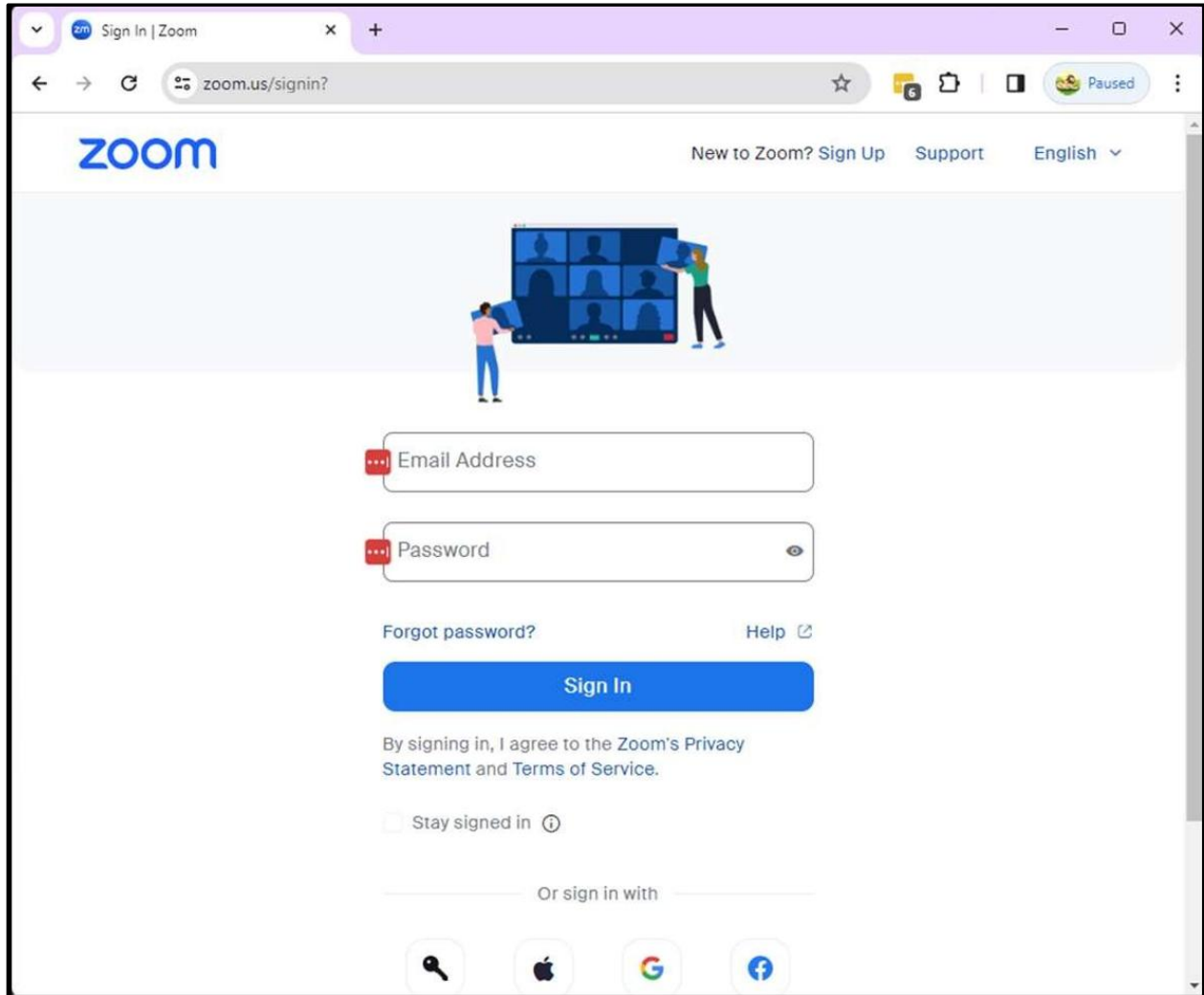
2.1. How to Install CoreAccess+

To begin the installation process, you can click the link to the Zoom Marketplace

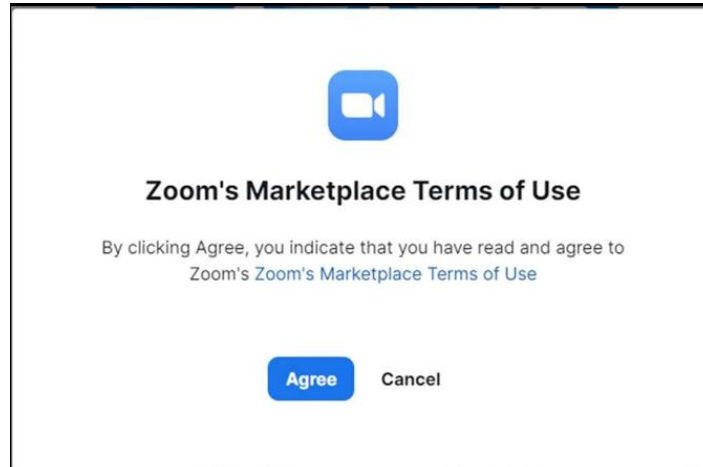
Alternatively, you can search for CoreAccess+ in the Zoom App Marketplace via the search bar in the top right corner



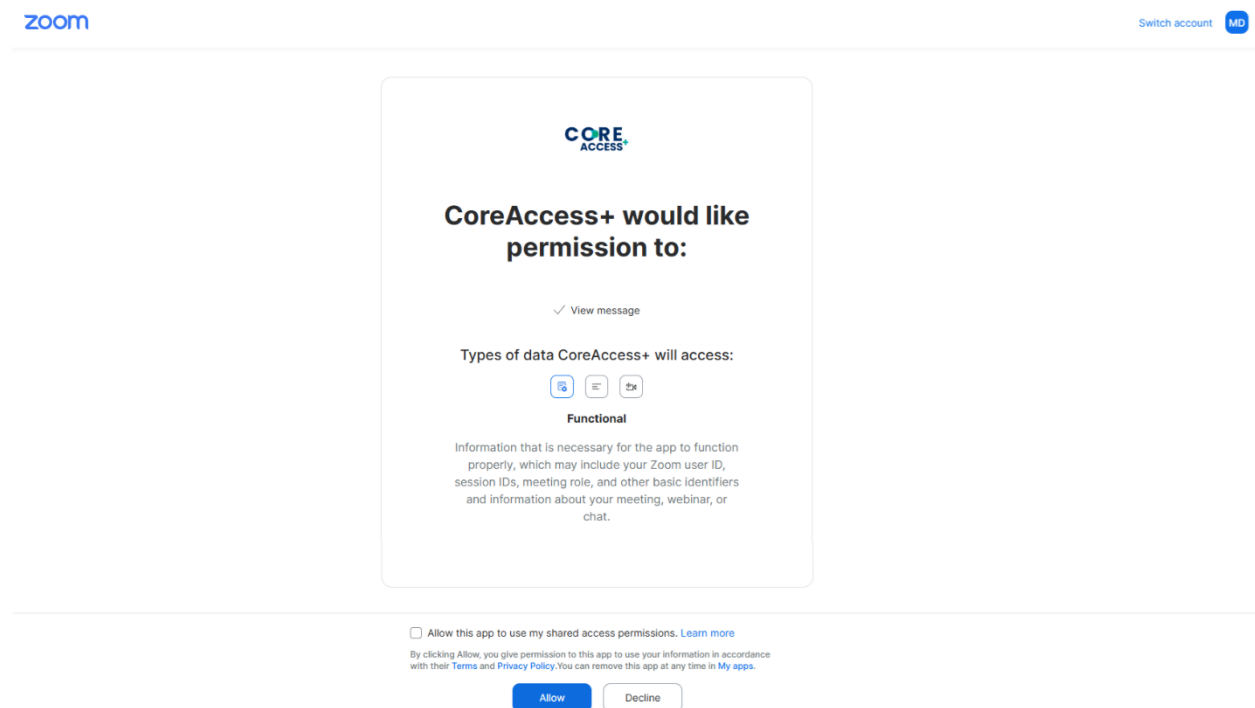
A Zoom Admin will need to be logged into the Zoom account on the web browser to install the CoreAccess+ App.



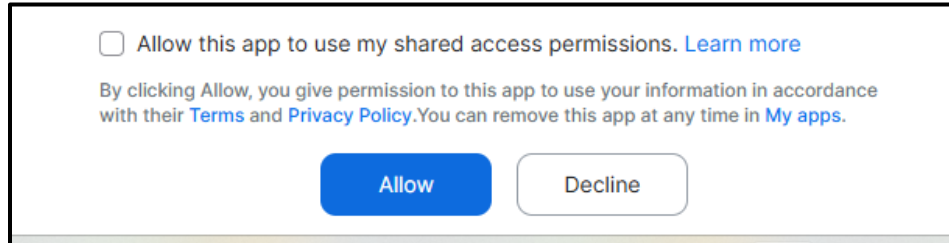
You may need to accept the Marketplace Terms of Use with Zoom.



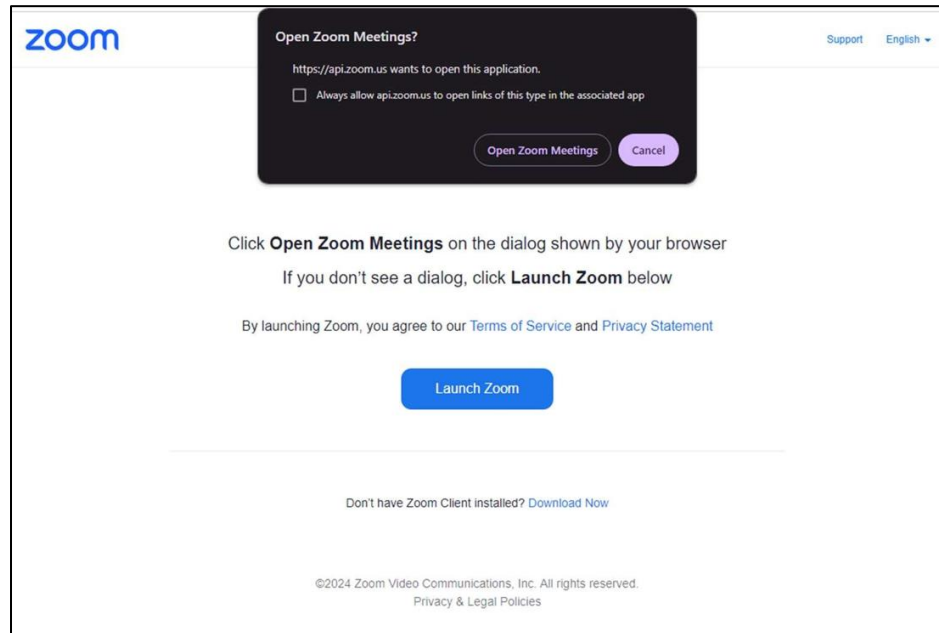
This will progress to the following page:



Check the 'Allow this app to use my shared access permissions'. Click on 'Allow' for shared permissions

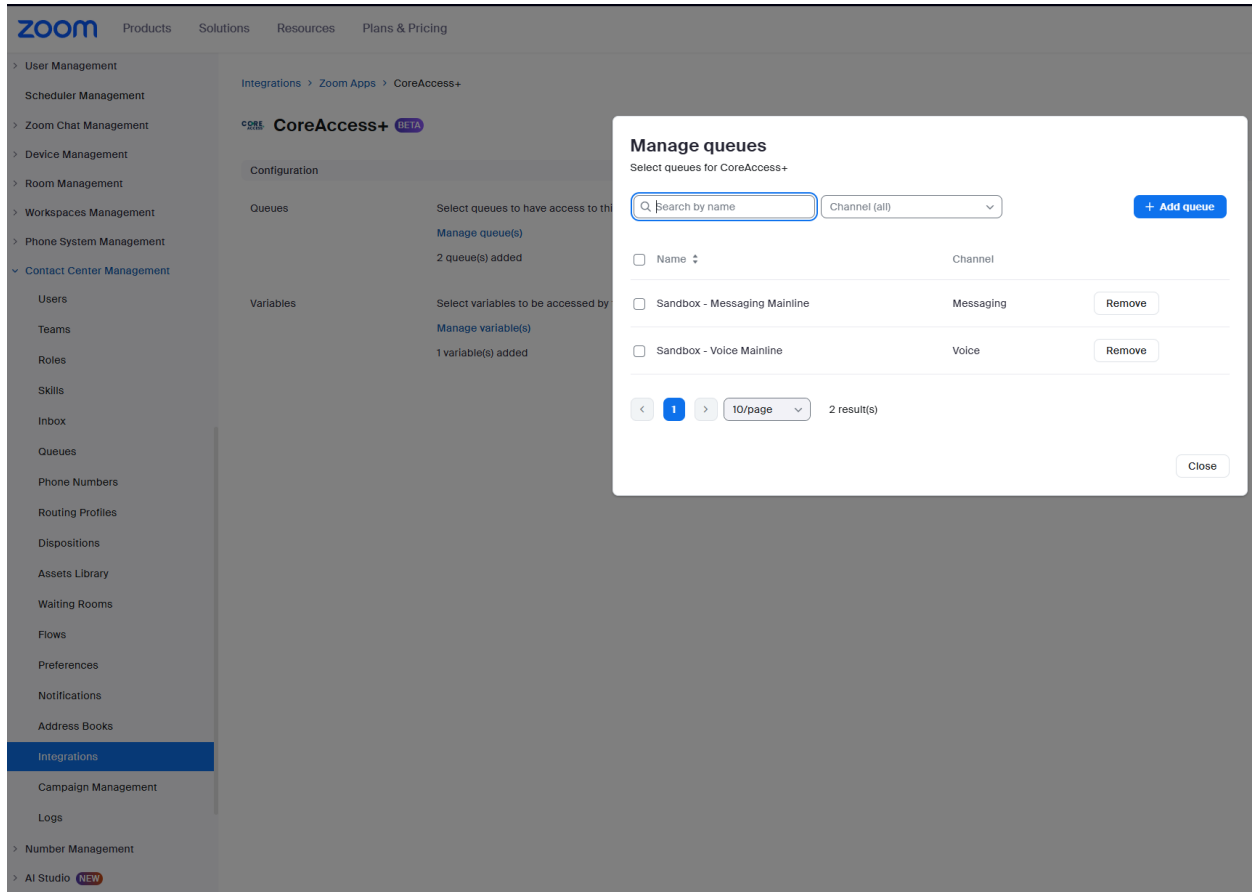


You will then be asked to open up your Zoom Desktop client.



You have the option to 'Always allow api.zoom.us to open links of this type in the associated app' (the software). Click 'Open Zoom Meetings'.

To open the app, the agent should belong to the corresponding queue in Zoom Contact Center. Below screenshot showing queue configuration selecting queues for CoreAccess+.



Add an authToken variable to CoreAccess+ Zoom App in order to pass the corresponding record from Zoom Contact Center to CoreAccess+

The screenshot shows the Zoom Admin console interface. On the left is a navigation sidebar with categories like 'User Management', 'Zoom Chat Management', and 'Contact Center Management'. The 'Integrations' section is highlighted. The main content area shows the configuration for the 'CoreAccess+' Zoom App. A modal window titled 'Manage variables' is open, displaying a table of variables for the app. The table has columns for 'Name', 'Group', 'Variable group', and 'Data type'. One variable, 'authToken', is listed with a 'Remove' button next to it. The modal also includes search filters, an 'Add variable' button, and pagination controls showing '10/page' and '1 result(s)'. The background shows the 'Variables' section of the app configuration, indicating that 1 variable has been added.

Add variable, authToken, used for authenticating API calls from CoreAccess+

The screenshot displays the Zoom Admin Center interface. On the left, a navigation sidebar lists various management options, with 'Contact Center Management' expanded to show 'Preferences'. The main content area is titled 'Preferences' and includes sub-sections for 'Account', 'Block list', 'Entry ID', 'Operating hours', 'Regions', and 'Variables'. The 'Variables' section is active, showing a search bar and a table of variables under the 'CoreAccess' group. The table lists variables such as 'authToken', 'clientTokenV1', 'clientTokenV2', and 'companyID', each with a default value and a data type of 'String'. The 'authToken' variable is highlighted, and a blue circle with the number '1' is placed next to it, indicating the first step in the process.

Variable name	Default value	Data type
authToken	--	String
clientTokenV1	[REDACTED]	String
clientTokenV2	[REDACTED]	String
companyID	--	String

Providing you are an Admin to your Company's Zoom solution, you will be able to auto install the app on other agent's accounts by clicking the Add for others button.

CORE ACCESS+ CoreAccess+
☆ Rate this app
MNET, LLC

Add for others

XYZ Credit Union
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Checking and Savings | Mortgage and Home | Car Loans | Credit Card

Chat
Welcome to XYZ Credit Union. Feel free to ask me any questions you have about our accounts, loans, or online tools. I'm here to help you discover the best options for you.
How may I help?

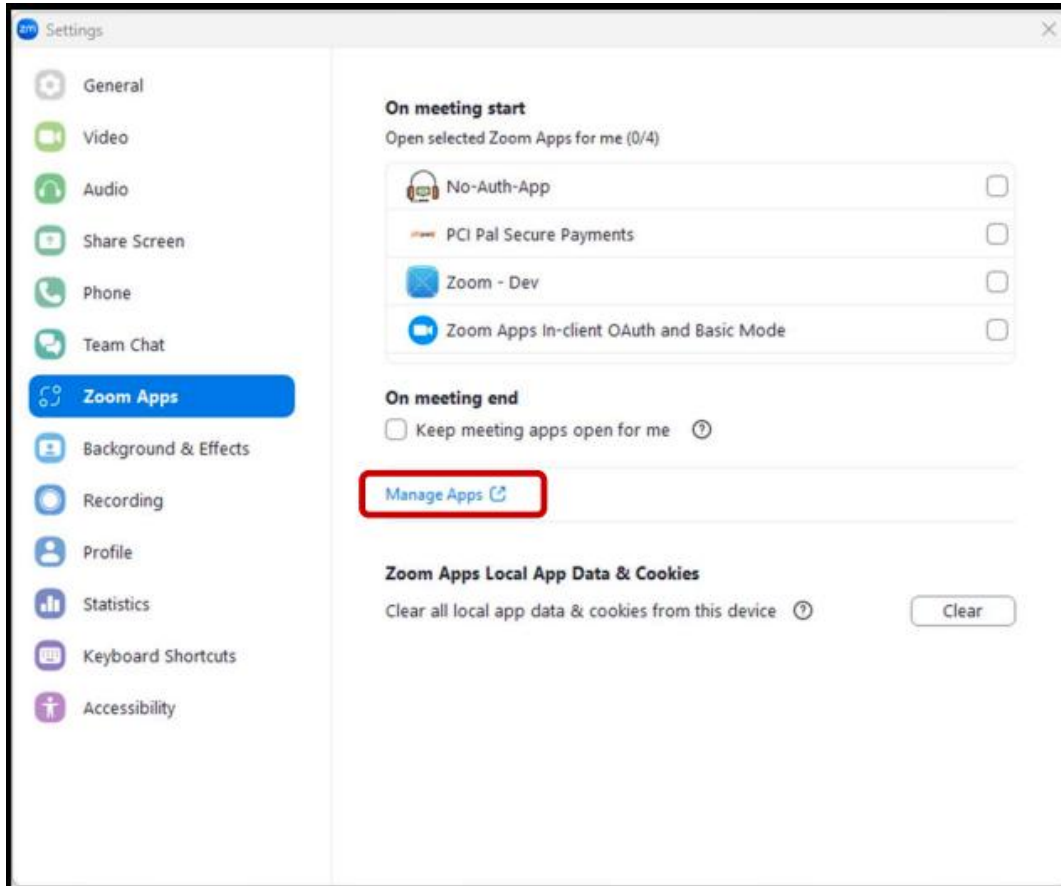
Categories: Business System Integrator +3
Works in: Contact Center
Zoom client version: Desktop - 5.7.3 or later

Overview

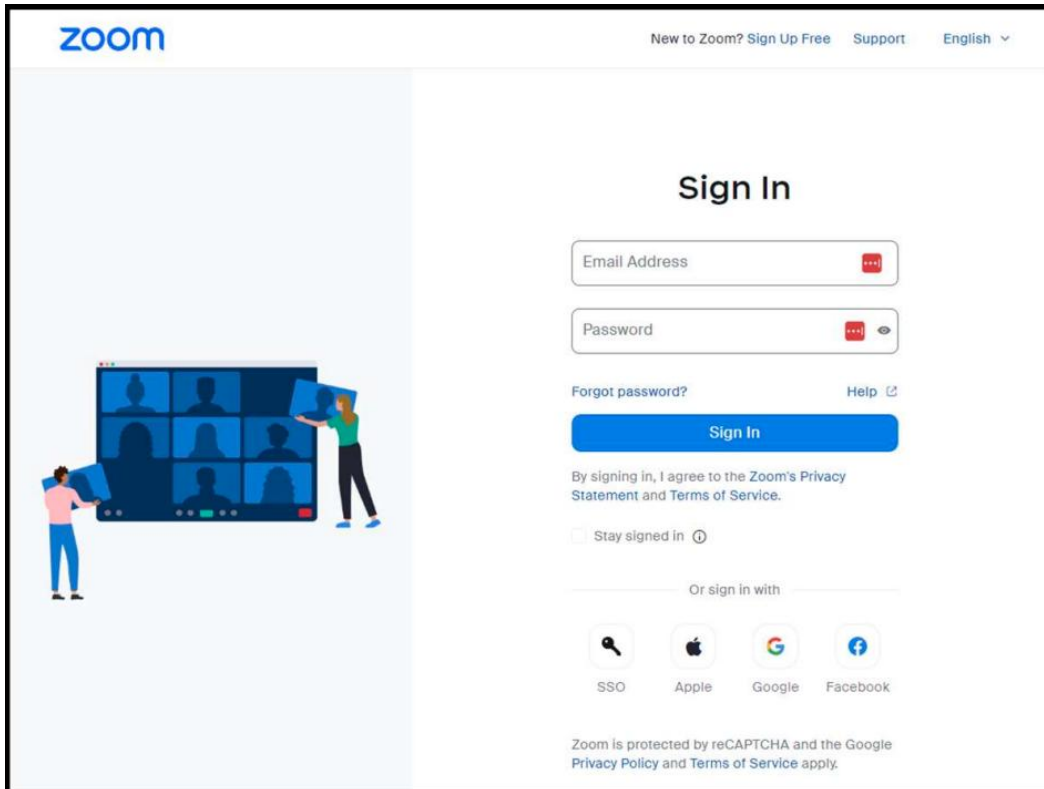
CoreAccess+ is purpose-built to give clients full control over their data and integrations. Once deployed within Zoom Workplace, customers can seamlessly escalate from chat or voice interactions to a live agent for faster resolution, enhancing the overall customer experience. Through direct integration with core systems, re-authentication is eliminated, enabling agents to instantly access relevant information and respond more efficiently to customer needs.

3. Uninstalling the CoreAccess+

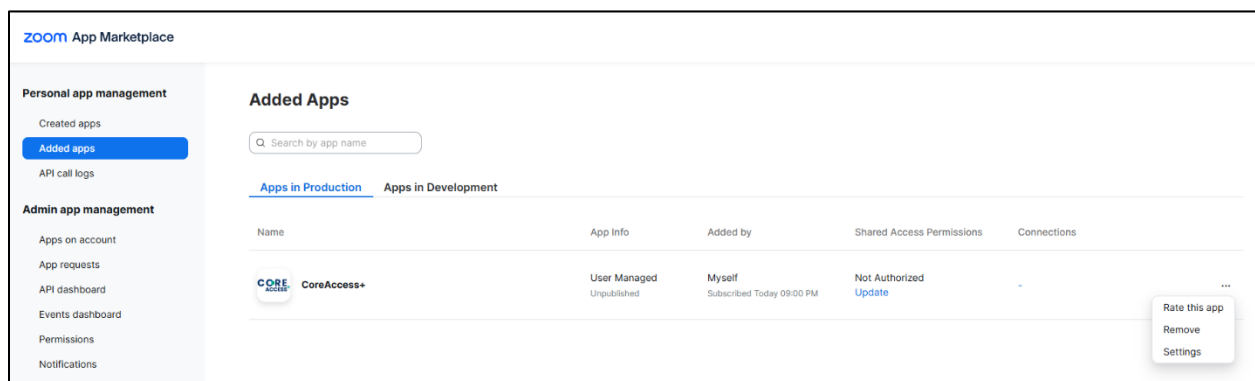
This app is uninstalled by your company admin for the contact center. Click on the 'Manage Apps' link at the bottom of the list.



This will open up your default browser and take you to the Marketplace
You may need to log into your Zoom account at this point. This is the same login you use for the Desktop software.



Once logged in, ensure you are on the 'Added Apps' page
Click the 'Remove' button.



You have the option to send feedback as to your reason for removal.

Should they be applicable, the options are:

- Quality Issues
- Abuse, fraud or spam

Else, click 'Remove'.

Remove App

i To request the deletion of your data in connection with your use of this app, please contact the app's developer.
Learn more about Zoom's privacy practices in the [Zoom Privacy Statement](#).

Select the reason for removing (Optional) ▾

Remove Cancel

[Nothing Follows]