

USING MOYOBI ZOOM PHONE APP



monitor your business intelligence



DATE: APRIL 2026

Using Zoom Phone App in MOYOBİ

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Introduction

This document is designed to assist you using the MOYOBİ Zoom Phone app in your MoYoBi trial or subscription tenant. This allows MoYoBi to collect call records from your Zoom Phone environment and use them for producing custom reporting for your business.

Prerequisites

To set up the data connector, you will need consent with a user from your tenant, the below scopes will be used.

Element	Value
Scopes used within the MOYOBİ APP	• phone:read:list_call_logs:admin • phone:read:call_log:admin • phone:read:list_call_queues:admin • phone:read:call_queue:admin • phone:read:list_auto_receptionists:admin • phone:read:auto_receptionist:admin • phone:read:list_users:admin • user:read:user:admin • user:read:list_users:admin • user:read:presence_status:admin
User	
Password	

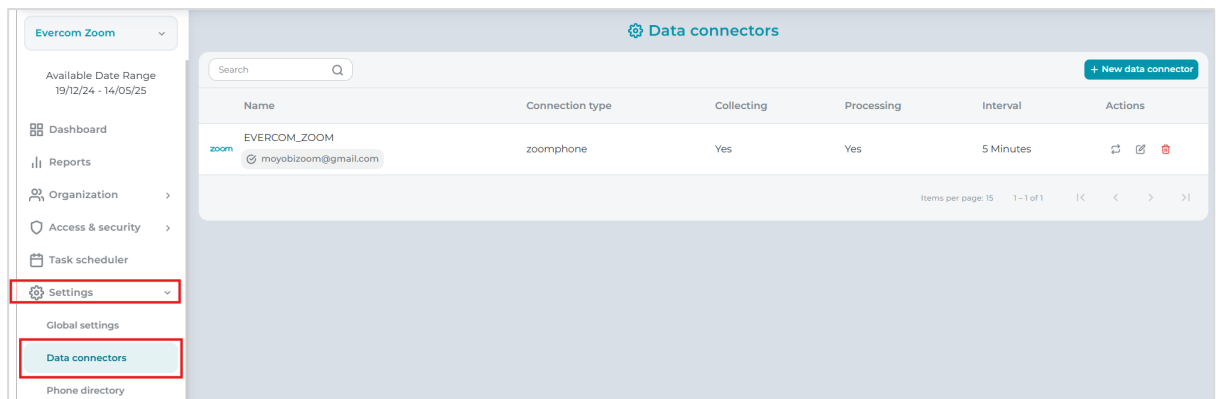
Note: The scopes listed in the table above are used by the MOYOBİ Zoom App and will also be required for the Zoom Phone connector to enable the full functionality of MOYOBİ.

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View Data Connectors in MoYoBi

The **Data connectors** page can be accessed from **Settings – Data connectors** menu and displays all the connections configured for the selected tenant.

Note that you can create multiple connections under the same MoYoBi tenant, but if you are hosting MoYoBi for multiple customers, we recommend separating each customer into their own tenant. This ensures that each tenant has its own database and prevents accessing other customers' data.



The following details are displayed for each data connector available on the **Data connectors** page:

- **Name** The name you assigned to your connector.
- **Connection Type** Type of the connector (which is different for each PBX).
- **Collecting** Shows whether collecting is currently enabled (**Yes** or **No**).
- **Processing:** Shows whether processing of data is currently enabled (**Yes** or **No**).
- **Interval** Interval configured for retrieving data.

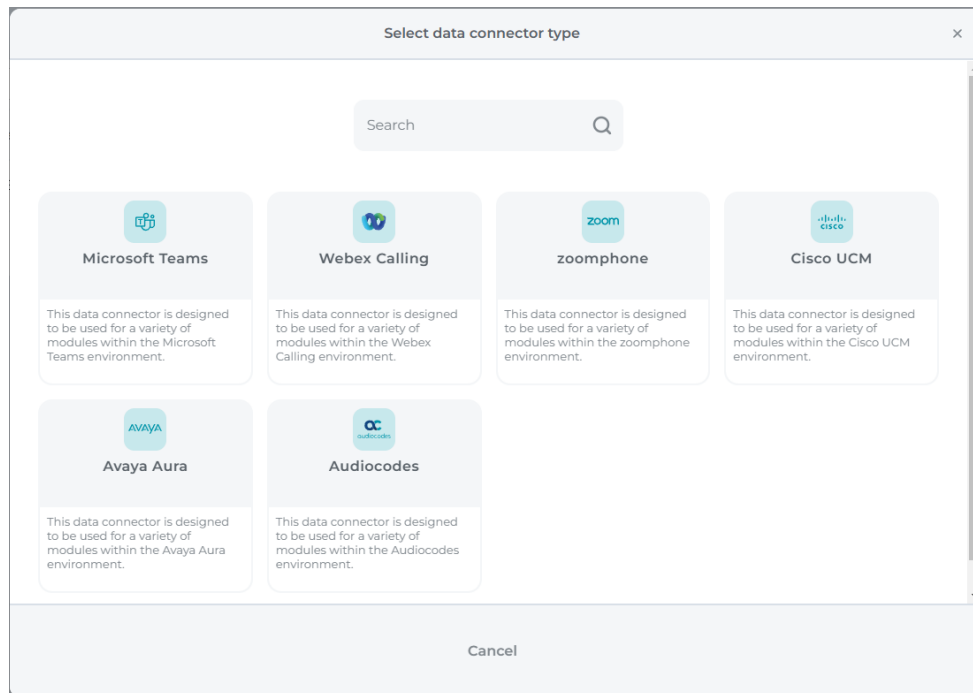
The options for **editing** (✎) or **deleting** (🗑) data connectors are also available on the **Data connectors** page, together with the option to **recollect data** (↺). You can also create new Zoom Phone data connector(s) for the selected tenant using the **New data connector** button.

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Create New Zoom Phone Data Connector

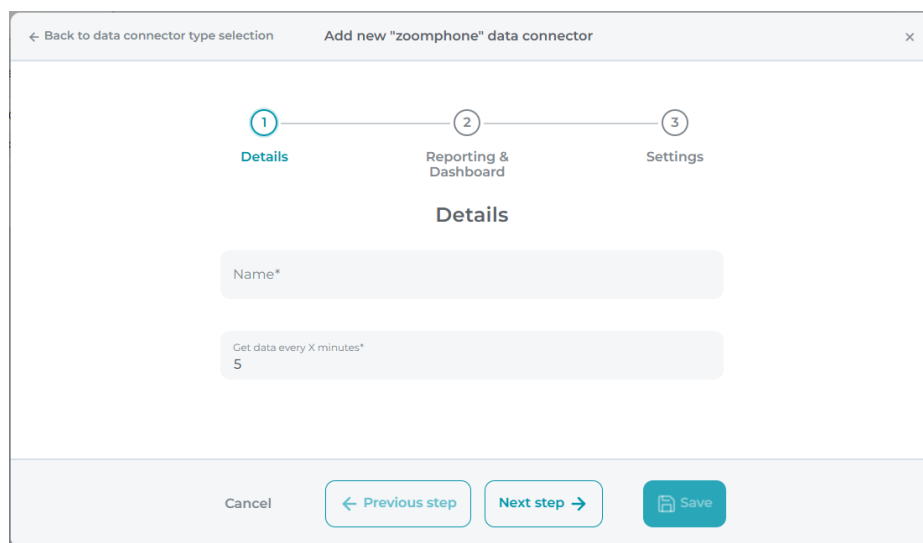
To create a new Zoom Phone data connector, proceed as follows:

- Click the **Data connectors** menu available under **Settings** in the navigation menu on the left.
The **Data connectors** page opens.
- Click **New data connector** button.
The **Select data connector type** page listing all data connector types opens.



- Click the **zoomphone** data connector type.

The **Add new "zoomphone" data connector** pop-up dialog opens. The **Details** section of the wizard is shown by default.



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- Enter a **name** for the new data connector.

Note that the name entered in this field is used to create a folder for the data collection. If you have multiple customers with the same data connector name, the system can still separate them based on the IDs, but for the users it may be more complex to find the correct folders, if needed.

- Define the frequency of the data collection in the **Get data every x minutes** entry field. Note that the default value is 5 minutes.
- Click **Next step**.

The **Reporting & Dashboard** section is displayed.

- Toggle on the **Enable collecting** option to start the collection of call data from this connector (through the Zoom Phone OAuth app integration).
- Toggle on the **Enable processing** option to start processing the collected data and insert it into the database.
- Toggle on the **Delete called/caller number during processing** option if you need to remove the called/caller number information during processing. Note that this option is visible only when the **Enable processing** option is toggled and is disabled by default.

← Back to data connector type selection Add new "zoomphone" data connector ×

Details **Reporting & Dashboard** Settings

Reporting & Dashboard

Collecting

Upon activating the collector, the system will initiate the collection of call records through the zoomphone OAuth app integration

☒ Enable collecting

Processing

Upon activation, the system will commence processing call records and inserting them into the database. Once the calls are processed, they will be ready for utilization on the dashboard and in reports.

☒ Enable processing

☐ Delete called / caller number during processing

Cancel ← Previous step Next step → Save

- Click **Next step**.

The **Settings** section is displayed.

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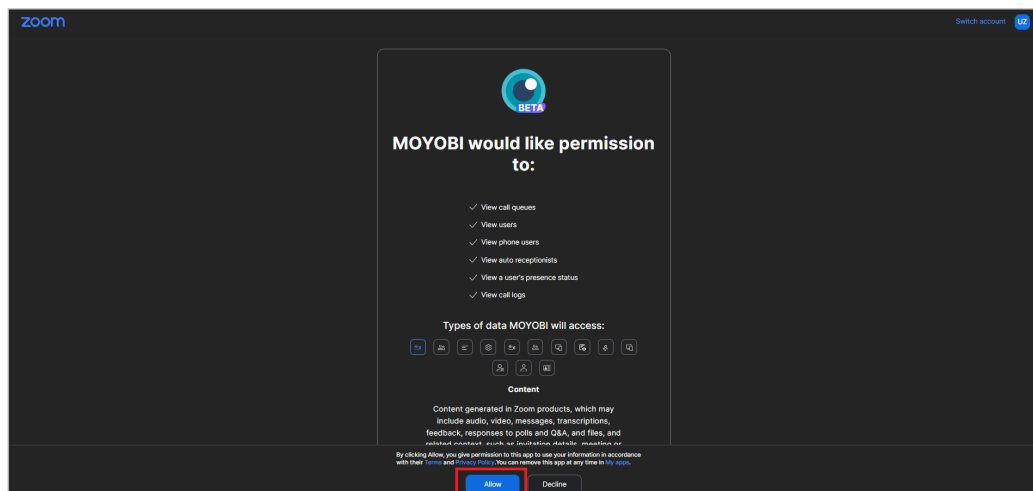
The screenshot shows a web interface for adding a new "zoomphone" data connector. At the top, there's a breadcrumb trail: "Back to data connector type selection" > "Add new 'zoomphone' data connector". Below this is a progress indicator with three steps: "Details", "Reporting & Dashboard", and "Settings" (which is the current step, marked with a '3'). The main heading is "Settings". Under "Connector Settings zoomphone API", there is a toggle switch labeled "Use system zoom app" which is currently turned on. Below this is a "Tips" box stating: "Call records can be retrieved for a maximum of 6 months in the past." Further down, there is a field for "First data collection start date" with the value "12/09/26" and a calendar icon. At the bottom, there is a "Consent" section with a "Consent" button. The footer contains "Cancel", "Previous step", "Next step", and "Save" buttons.

- Select the option "use system zoom app" to use the MOYOBİ app from the zoom marketplace.
- Select the **start date** for the first collection of call records. Note that this field is mandatory. Additionally, you can only select a date that is maximum 6 months prior to the current date.
- Click **Consent**.

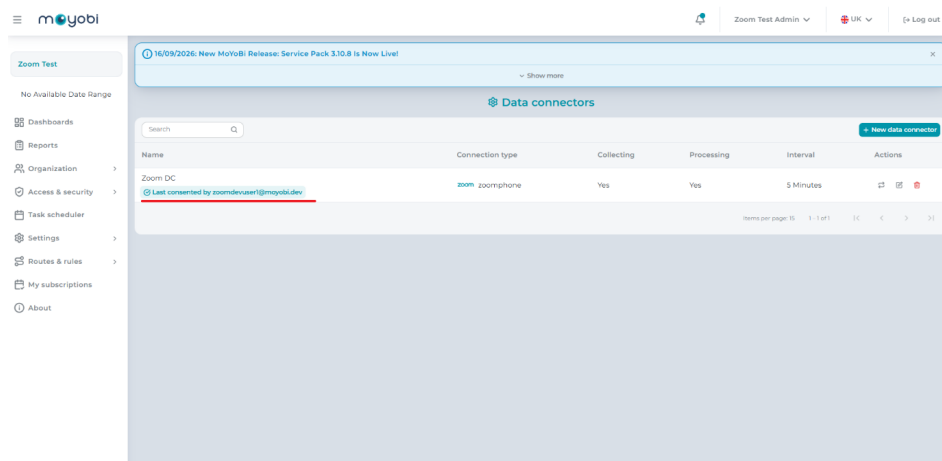
You are redirected to the Zoom login page and required to authenticate to complete the consent process.

The screenshot shows the Zoom login page. It features the Zoom logo at the top. Below it are input fields for "Email Address" and "Password". A blue "Sign In" button is positioned below the password field. Underneath the button, there is a line of text: "By signing in, I agree to the Zoom's Privacy Statement and Terms of Service." Below this, there is a section titled "Or sign in with" followed by five icons for SSO, Apple, Google, Facebook, and Microsoft.

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After you provide consent, you will be redirected back to the data connector configuration wizard.



Important note: The user granting consent must have full administrative privileges and appropriate licensing (A business or Enterprise Account, Zoom Phone license and role admin).

- Click **Save**.

The new Zoom Phone data connector is shown in the **Data connectors** list and is now ready to collect Call Logs, Import Users, Call Queues, Auto Receptionist and provide real-time presence information from your zoom users.

Note! If you want to use your own app unselect the option and add the Client ID & Client Secret from your own created app, for more information please refer to the "MoYoBi Using Own Zoom Phone App" document

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Using Zoom App

Once authorization has been successfully completed, you can start using the integration to import Zoom Phone users, Auto Receptionists, and Call Queues, and to collect Zoom Phone call history.

This data is used to generate reports and dashboards that provide insights into calling activity and usage across your Zoom Phone account.

In addition, real-time user presence status can be displayed in supported dashboard widgets to provide up-to-date visibility into user availability.

For more information about the integration, configuration, and supported functionality, please refer to the related Q&A documentation.

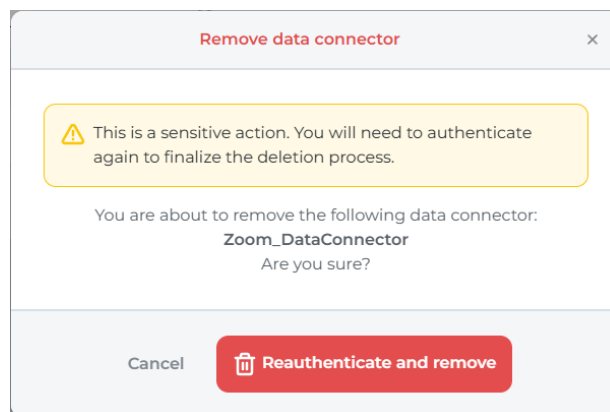
Delete Zoom Phone Data Connector

The data connector removal is a sensitive action and therefore, you will need to authenticate again to finalize the deletion process. To delete a data connector, proceed as follows:

Important! A data connector which already has data or/ and scheduled tasks linked to it **cannot be deleted**. However, if the data connector deletion is mandatory, you must first delete the data (i.e. using the *Delete Calls* task) and/or the linked scheduled tasks.

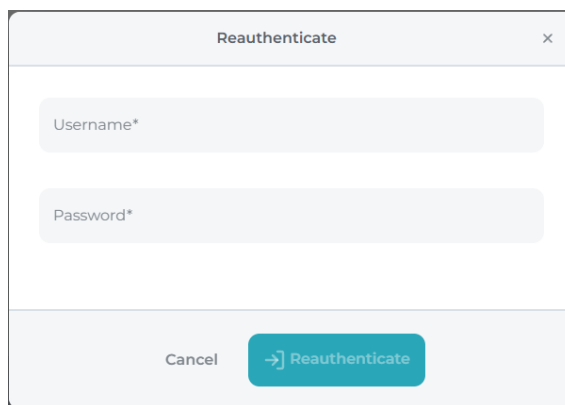
- Click the **Data connectors** menu available under **Settings** in the navigation menu on the left. The **Data connectors** page opens.
- Click the  icon available for the data connector under the **Actions** column.

A message informing that you are about to delete the data connector is shown in the **Remove data connector** dialog.



- Click **Reauthenticate and remove**. The **Reauthenticate** pop-up dialog appears.

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A screenshot of a 'Reauthenticate' dialog box. The dialog has a title bar with 'Reauthenticate' and a close button (X). It contains two input fields: 'Username*' and 'Password*'. At the bottom, there are two buttons: 'Cancel' and a blue button with a right arrow icon and the text 'Reauthenticate'.

- Enter your credentials in the **username** and **password** fields and click **Reauthenticate**.

Note that if you are logged in using SSO, you will be redirected to the Microsoft Sign-in page (instead of the *Reauthenticate* pop-up dialog) and asked to reauthenticate by providing your Microsoft Account credentials.

Once you re-authenticate, the data connector is removed from the **Data connectors** page and the app is not used anymore to collect information from your tenant.