# Table of Contents

**New Zoom App Installation**  
  1. Obtain and Install the Zoom App in Salesforce  
  2. Configure Zoom App  
  3. User Setup for Access to Zoom App  
    - Add users to Zoom Permission Set  
    - Salesforce User and Zoom User Mapping

**Upgrading Zoom App**  
  1. Checking for the Latest Version  
  2. Upgrade Process

**Enable and Configure Zoom features**  
  1. Zoom Configuration page  
  2. Enable Remote site settings

**Customize Salesforce objects to include Zoom features**  
  1. Event Page Layout Customization  
    - Step 1. Edit your Event Page Layout  
    - Step 2. Move the Button, Fields and Visualforce page to the Event Detail Section in Event Page Layout.
  2. Lead Page Layout Customization  
    - Step 1. Edit your Lead Page Layout  
    - Step 2. Move the button “Start Zoom Meeting” to the detail section
  3. Contact Page Layout Customization  
    - Step 1. Edit your Contact Page Layout  
    - Step 2. Move the button “Start Zoom Meeting” to the detail section
  4. Other objects Page Layout Customization  
    - Enable feed tracking

**Modifying from email address for Zoom invitations**  
  1. Create an Organization-Wide Email Address  
  2. Enter email address in custom setting

**Check Email Deliverability**  
  1. 

**Admin Features**  
  1. Reports  
  2. Syncing Non-Salesforce Zoom Meeting into Salesforce

**Frequently Asked Questions**  
  1. 

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New Zoom App Installation

The following summarizes the basic steps to integrate Zoom into your Salesforce deployment.
- Obtain and install Zoom app from the Salesforce AppExchange
- Configure Zoom app to connect to your Zoom account and enable desired features
- Setup user access to Zoom app
- Enable and setup desired Zoom features
- Customize Salesforce objects to include Zoom features

Obtain and Install the Zoom App in Salesforce

1. Find the Zoom App in the Salesforce AppExchange and select “Get It Now”. If prompted, log in to your Salesforce admin account (production).
2. Select if you want to install in Production or in the Sandbox.
3. Review the installation details and confirm you have read and agree to the terms and conditions.
4. Select “Confirm and Install”.
5. When shown the install options, select the option you would like to have installed and select “Install” to begin the installation. For security reasons, select “Install for Admins Only”.

 ![Zoom App Installation Options](image)
6. Give access to Zoom API & Google API (If you need to integrate with Google Calendars. You can change this setting later.) Then click “Continue”. Then the app will be installed.

![Install Zoom](https://developer.zoom.us/me/)

**Configure Zoom App**

1. Login to your Zoom account as an admin and navigate to the [https://developer.zoom.us/me/](https://developer.zoom.us/me/).

![Developer Account](https://developer.zoom.us/me/)

2. Save or remember the “API Key” and “API Secret” as it will be used in a later step.
3. Go back to your Salesforce admin portal and bring up the App Launcher.
4. Click on Zoom Config and fill in:
   ● API key and API secret that you obtained earlier from your Zoom admin account
   ● Zoom URL: https://zoom.us/

5. Under User settings, there are user personal settings for you only.
   ● Login type: Select the method used to login to your Zoom account. Select one of them (Work Email, Google, SSO or Facebook) Select how you login to Zoom.us. (Removed since version 2.2)
   ● PMI Enabled: Select this if you want to use personal Meeting Id for the meetings.
   ● Send Email: Select this, if you want to send email, before starting of a meeting.
User Setup for Access to Zoom App

By default, all users are enabled with permission to use the “Zoom connected app”. If that is not the desired behavior, you can change the default permission and selectively enable specific users as described in the following instructions:

1. In classic, navigate to Administration Setup -> Manage Apps -> Connected Apps and select “Edit” for the Zoom App.
2. In lightning, navigate to Setup> Platform Tools > Connected Apps > Manage Connected Apps > Zoom > Edit policies.
3. Under OAuth policies, set Permitted Users to “Admin approved users are pre-authorized”.

![Configuration Panel](image-url)
3. Navigate to Administration -> Users -> Permission Sets and find “Zoom Admin” & “Zoom User”.
4. Clone the permission sets and give names for new permission sets.
5. Add “Zoom” connected app to both of them.
6. Assign users to Zoom admin and Zoom user permission sets as per the requirement.

Add users to Zoom Permission Set

a.) Add One user to the permission set: Go to Manage Users -> Users, click on the username, Edit Permission Set Assignments, add Zoom Permission Sets to the user

b.) Add Multiple users to the permission set: Administrator can also go the Permission Set and Manage Assignments do add multiple users to this permission set.
Path for lightning : Setup> Administration > Users > Permission Sets

Salesforce User and Zoom User Mapping

Important mapping for the Salesforce Zoom App to work is the email of the Salesforce user must match exactly with the email (username) of the Zoom User. Otherwise, the complete functionality will not work. It is better to maintain different email for every user in Salesforce because a Salesforce User Account is mapped with a Zoom User Account and completed app logic is built on user email.

The Email addresses of Salesforce Users are
Emails must be exactly matched with Zoom Users emails / Username

Upgrading Zoom App

Checking for the Latest Version

1. In Salesforce under Setup > Installed Packages > you will see the Zoom App with version number mentioned.

2. To know the latest version of Zoom app, go to App Exchange Link - Zoom. Under “Additional Information”, you will find the current package version, released date and other details.

Upgrade Process

Process [https://appexchange.salesforce.com/appxListingDetail?listingId=a0N30000000qEuqEAE](https://appexchange.salesforce.com/appxListingDetail?listingId=a0N30000000qEuqEAE)

If you want to install the latest version of Zoom App, install from AppExchange which is an upgrade. Previously if you have given access to only System Admin or Selected Profiles but you want to give access for all users now, it’s better to upgrade the same package by selecting all users while installing.
Upgrade Zoom
By Zoom

An earlier version is installed. It can be upgraded while preserving the existing data.
Installed: Zoom  New Version: Zoom

- Install for Admins Only
- Install for All Users
- Install for Specific Profiles...

Upgrade  Cancel
Enable and Configure Zoom features

1. Zoom Configuration page

a) Enter the credentials (Zoom API, Secret) from https://developer.zoom.us/me/# along with Zoom URL.

b) By checking the “PMI Enabled”, the user will be able to create Instant Meetings from “Start Zoom Button” on Lead/contact using Personal Zoom Meeting ID.

c) Automate the creation of event for the Zoom meetings created outside Salesforce for matching Contacts / Leads. This feature will pull the zoom meetings that are created outside of salesforce into salesforce. You can select the following option to activate this feature.

Use the Active button to start or stop the daily schedule jobs.
d) By checking the “Send Email to Attendee”, the user will be able to send Email to the attendee after starting the meeting from Lead and Contact.

f) Google Calendar API Setting
To sync your zoom meeting to your google calendar, you can follow the steps below to set your google settings on zoom config page.

2. In the API Manager at the left side click on "Library" and under "Google Apps APIs" click on "Calendar API" and then click on "ENABLE"
3. Create a Project.
4. Then click on "OAuth consent screen" tab and provide the project name.
5. Then Click on "Credentials" in the API Manager in the left bar, then click on "Create Credentials" then Select "Oauth client ID".
6. Then Select "Web Application" and click on "Create".
7. Then under the "Create Credentials" button select "API Key" and create the API key by saving it.
8. Added these API key, Client Secret and Client Id under the "Google Calendar API Settings" in "Zoom Config" tab.
9. Please make sure that you are not logged into other Google account
2. Enable Remote site settings

Go to Setup > Security Controls > Remote Site Settings

Edit the Zoom & Google API and enable them.

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<th>_</th>
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Customize Salesforce objects to include Zoom features

Event Page Layout Customization

Don’t add other pages to the page layouts which are not in the documentation. It leads to app malfunction. Ex: StartZoomMeeting or MakeZoomMeeting pages. Don’t add these pages.

Step 1. Edit your Event Page Layout

Step 2. Move the Button, Fields and Visualforce page to the Event Detail Section in Event Page Layout.

Move the button “Start Zoom Meeting” to the layout.
Move the “Start Zoom Meeting” action to the layout for classic and lightning.
Create new section “Zoom Meeting Information” and add following fields.
1. Use my Zoom PMI
2. Join Before Host
3. Schedule a zoom meeting
4. Send Email to External Attendees

If you want to use time zone feature for the event, add below fields too to the layout.
1. Customer Timezone
2. Customer Start Time
3. Customer Meeting Duration

Create another section “Zoom Meeting Details” and add “ZoomEventDetails” Visualforce page to this section and Height (in pixels) as “400” and save it. You can increase as per your requirement.

**Lead Page Layout Customization**

**Step 1. Edit your Lead Page Layout**

This page allows you to create different page layouts to display Lead data. After creating page layouts, click the Page Layout Assignment button to control which page layout users
Step 2. Move the button “Start Zoom Meeting” to the detail section

Move the button “Start Zoom Meeting” to the layout.
Move the “Start Zoom Meeting” action to the layout for classic and lightning.

Contact Page Layout Customization

Step 1. Edit your Contact Page Layout

This page allows you to create different page layouts to display Contact data. After creating page layouts, click the Page Layout Assignment button to control which page layout users see.

Step 2. Move the button “Start Zoom Meeting” to the detail section

Move the button “Start Zoom Meeting” to the layout.
Move the “Start Zoom Meeting” action to the layout for classic and lightning.
**Other objects Page Layout Customization**

1. Similarly, you can customize for Case object too.

2. If field service lightning enabled, you can customize similarly for “Service Appointments” object. But button not available for that. You can start zoom meeting from “Start Zoom Meeting” action.

**Enable feed tracking**

For any object actions are not visible, need to enable feed tracking for that object. Visit [https://help.salesforce.com/articleView?id=collab_feed_tracking.htm&type=5](https://help.salesforce.com/articleView?id=collab_feed_tracking.htm&type=5)

**Modifying from email address for Zoom invitations**

*Create an Organization-Wide Email Address*

Go to Setup → search Organization-Wide Addresses

![Screen capture showing the Organization-Wide Email Addresses page](image)

Click on “Add”.
1. Enter the Display name as the name which you want as the name while sending invitation mail.
2. Enter the email address from which you want to send invitations.
3. Select “Allow All Profiles to Use this From Address”

To use the mail go to the configuration page and add the verified ORG Wide Email address.
Check Email Deliverability

- Setup > Email Administration > Deliverability
- Verify Access level is set to "All email".

Admin Features

Reports

Open the “Zoom Report” folder under Report tab. This folder contains 3 different types of reports.

1. Zoom Events:
   This report contains all the events which has Zoom Meeting with event information like subject, Start Date, Account, Contact and Opportunity.

2. All Zoom Meetings by Status:
   This report shows all the events having Zoom Meeting Scheduled with all the Zoom information like Subject (Zoom topic), Zoom Meeting Start Time, End Time, Duration (mins), Participant Count, Participants which are grouped by Zoom Meeting Status.

3. All Zoom Meetings by User by Status:
   This report shows all the events having Zoom Meeting Scheduled with all the Zoom information like Subject (Zoom topic), Zoom Meeting Start Time, End Time, Duration (mins), Participant Count, Participants which are grouped by User and then by Zoom Meeting Status.

Note: - You will find reports with “New” appended to name. Those are new reports after the data model changed. Earlier all data present on Event only. Now you will find data will be saved to new custom object.

Syncing Non-Salesforce Zoom Meeting into Salesforce

To sync zoom meetings which are created outside of salesforce, can be synced and saved as events by attaching to respective contact or lead. But to link events, host of zoom meeting should be owner of the respective contact or lead. The zoom meeting host should match with owner of any contact or lead. Then events will be created automatically. If this is not matched, such meetings will be shown on External Zoom meetings page, of respective users.

To start syncing, on the zoom configuration page,
Tick the “Active” check box, and enter the start time and interval required. So, as per the interval given, jobs will be scheduled automatically in background to fetch the external zoom meetings.

**Frequently Asked Questions**

1. **Meeting Id is showing as null**
   **Sol:** Make sure “Remote Site” Settings are correct. Only Admins have access to change.

2. **No mail is being received from Salesforce**
   **Sol:** Check “Email Deliverability” settings. Change to “All mail”.

3. **What is the requirement/conditions to sync a external zoom meeting to Salesforce?**
   **Sol:** The zoom meeting host should match with owner of any contact or lead. Then events will be created automatically. If this is not matched, such meetings will be shown on External Zoom meetings page, of respective users.

4. **Where can we see the zoom meeting data related to the Event.**
   **Sol:** On the page layout, you need to add “ZoomEventDetails” visualforce page.

5. **I get an Error of Zoom_Meeting_Creation_Status , it’s said ‘Your email is not a valid Zoom User, Please check with your Administrator’**
   **Sol:** The email of your salesforce user is not a zoom account user, please ask your zoom account admin to invite you as a zoom user.

6. **I get an Error of Zoom_Meeting_Creation_Status , it’s said ‘Schedule Meeting for xxxx@mail.xx.com Failed, you are not an assigned scheduler. Please check schedule for settings on zoom.us’**
   **Sol:** To change the owner of zoom meeting on salesforce, you should get the new owner’s approval for ‘schedule for’ setting on zoom web. please ask the target user sign in to zoom web and add your email address to My Meeting Setting → Schedule Privilege
Enable this option to hide potentially sensitive information from the snapshot of the Zoom main window. This snapshot displays as the preview screen in the iOS task switcher when multiple apps are open.

**Invitation Email**

Your meeting attendees will receive emails in language based upon their browser/profile settings. Choose languages which your expected attendees will receive content in to edit.

Choose email in language to edit: English

Send me a preview email

**Schedule Privilege**

You can assign others in your account to schedule meetings on your behalf. You can also schedule meetings on behalf of someone that has assigned you scheduling privilege. You and the assigned scheduler must be on a paid plan within the same account.

Assign scheduling privilege to: [ ]

I can schedule for:

No one

**Integration Authentication**

Key: n28jQ7tjwKDoTw4vd9A

Secret: 1Q7op4P52u6vmq2h17yMXxEmDANQy5wT3kw

Regenerate