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Event – Schedule a Zoom meeting

Step 1. Schedule a Zoom Meeting when an Event is Created or Updated

When an Event record is created or updated with “Schedule a Zoom Meeting” field is checked, a Zoom meeting is scheduled for this Event.

Step 2. Start the Scheduled Zoom Meeting from Event Detail Page

Once the Zoom meeting is scheduled, we can find the Zoom meeting start url in the description field. This Zoom meeting can also be started from the button “Start Zoom Meeting” on Event Detail Page.
Step 3. “Start Zoom Meeting” button can also be used to Start Instant Zoom Meeting

If a Zoom meeting is not scheduled for an Event, then the “Start Zoom Meeting” button is used to start the Instant Zoom Meeting.

Users can find the Instant Zoom Meeting in the Activity History as well.

This will also create scheduled meeting in your Zoom Client Side in Meetings tab.
**Step 4. Send Email to Salesforce Event Invitees and External Attendees while scheduling a Zoom Meeting**

While scheduling a Zoom meeting from the “Schedule a Zoom Meeting” use the “Send Email” button to send email to the users / contacts / leads add as invitees and any additional emails in the “Send Email to External Attendees”.

Note: Email is Sent while scheduling the Zoom Meeting and you can also resend when the Send Email field is subsequently Checked after scheduling the Zoom Meeting.

![Edit Test Meeting](image)

**Step 5. Send Email to Attendees while Starting the Zoom Meeting**

Once the Zoom meeting is started from “Start Zoom Meeting” button, it automatically redirects the user to the Email interface where user can send an Email to the attendee with the Zoom meeting details.

This will also take the user to the Email interface where user can send an Email to the attendee with the Zoom meeting details. This page is available only if “Send Email to Attendees at Launch” is checked in User Settings in Zoom Config Tab. Otherwise, Zoom Meeting is launched.
Step 6. Use my Zoom PMI and Join before Host buttons on Event Page

“Use my Zoom PMI” is used to schedule the Zoom meeting with the User’s respective Personal Zoom Meeting Id.

“Join before Host” checkbox allows attendees to join the Zoom meeting before the Host joins.

Event – Zoom Meeting Details

The page section “Zoom Meeting Details” in the Event Detail Page displays the Zoom Meeting Details like participants, meeting duration and recording links.
The Zoom Meeting Details like Meeting Duration, Participants and Participants count are shown only after the Zoom Meeting is completed ended. Which means the Zoom Meeting is ended by host for all the participants. Zoom Details are only shown for past meetings, not for live or present meetings.

If PMI is enabled for the Zoom meeting, the Zoom Details are not shown here until the events are created automatically from ExternalZoomMeeting Schedule Batch or manually from External Zoom Meetings Tab.

**Event – External Zoom Meeting Details**

If ExternalZoomMeetingAutoBatch is scheduled in regular intervals by Admin in Zoom Config Tab, then Events are created for the matching Contacts / Leads with the participant’s name. The Contact / Lead Name (First Name + Last Name) must match exactly with the Participant Name. First it is checked with contact name and then in lead name. The external Zoom Meeting is related only with Contact / Lead but not both.

If this setting is not enabled or the participant name does not match exactly with contact or lead, automatic events are not created. These External Zoom Meetings can be accessed from “External Zoom Meeting” tab. If this tab is not visible:

Click on **In App Launcher, Click on “External Zoom Meetings”**.
Once the “External Zoom Meeting” tab is clicked, user need to enter the Start and End Date range of the Zoom Meeting Date and then “Get Details” must be clicked.

For selected External Zoom Meetings, users can relate to contact / lead and create Salesforce events.

Get Details button is used to get the external Zoom Meeting created in specified start and End date range.

Create Events button is used to create salesforce events for the selected external Zoom meetings for mapped contact / leads.

**Limitations**

The page can pull maximum of 2700 Zoom Meetings in the organisation, but displays only the Zoom Meetings related to logged in user in the given time interval. So we need to reduce the time interval to get the Zoom Meetings under 2700 if you get below popup message.
Lead – Start an Instant Meeting

Click on “Start Zoom Meeting” button to start an instant Zoom meeting. This will launch the meeting and also create an Event under Lead record record for reporting purposes.

This will also take the user to the Email interface where user can send an Email to the attendee with the Zoom meeting details. This page is available only if “Send Email to Attendees at Launch” is checked in User Settings in Zoom Config Tab.

Otherwise, Zoom Meeting is launched.
**Contact – Start an Instant Meeting**

Click on “**Start Zoom Meeting**” button to start an instant Zoom meeting. This will launch the meeting and also create an Event under Contact record for reporting purposes.

This will also take the user to the **Email** interface where user can send an Email to the attendee with the Zoom meeting details. This page is available only if “Send Email to Attendees at Launch” is checked in User Settings in Zoom Config Tab. Otherwise, Zoom Meeting is launched.
Modifying from email address for Zoom invitations

Create an Organization-Wide Address

Go to Setup → search Organization-Wide Addresses

Click on “Add”.

1. Enter the Display name as the name which you want as 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”

On saving, you will receive an email address to verify this. Click on the link to verify it.

Enter email address in custom setting

Go to Setup → Search “Custom Settings”

You will see the “Zoom Configuration”. Click on “Manage”. You will see a record named “Zoom_Config”. Click on “Edit”.
DON’T CHANGE THE NAME

Just enter the email address which we have verified earlier. Then save the record.

**Note:** If any mistake happened in above procedure. Current logged in user’s mail address will be used as from address for zoom invitations.

Procedure of Entering time in Event

Creating Event in Classic

While creating “Event”, you will see the following fields.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Field Type</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Start Time</td>
<td>Date/Time</td>
<td>Enter the time which customer is requesting</td>
</tr>
<tr>
<td>Customer Time Zone Region</td>
<td>Picklist</td>
<td>Select the time zone region</td>
</tr>
<tr>
<td>Customer Time Zone</td>
<td>Picklist</td>
<td>Select the time zone</td>
</tr>
<tr>
<td>Duration of Meeting</td>
<td>Number</td>
<td>Enter the estimated duration of the meeting</td>
</tr>
</tbody>
</table>

After saving the event with above data, Start & End times of the event will be in the salesforce user’s time zone. Let’s see an example.

In above image, Customer’s time zone is assumed as GMT, and Salesforce logged in user’s time zone is +5:30 IST.
Creating Event in Lightning

In lightning also same fields will be there but look and feel is different. See screenshot below.

On entering data,
Reports

Open the “Zoom Report” folder under Report tab. If this folder is not found. Please contact your admin to share the folder. This folder contains 3 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.