Salesforce Zoom App User Guide

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Modify the zoom configuration

**Zoom Configuration page**
Go to “Zoom Config” tab and open configuration page.

You will find the user settings. Modify the following fields.

![User Settings Table]

**A) User Settings**

User Setting is a user level setting, just works for the current user.

1) PMI Enabled
   By checking the “PMI Enabled”, the user will always use PMI (Personal Meeting Number) to schedule or start Instant Meetings. (not recommended)

2) Send Email to Attendees at Launch
   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.

3) Send ICS in Invitation Email
   Add a ICS(Internet Calendar Scheduling) as the attachment to meeting invitation email.

**B) User Google Calendar API Setting**

If you want to sync zoom meetings with Google Calendar, you can activate it by providing respective data. It’s optional.

**Google Project API Creation**


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.

New Project

You have 11 projects remaining in your quota. Learn more.

Project name

My Project 65643

Your project ID will be 2era-bonfire-215307 Edit

Organization
dhruvsoft.com

You have logged in under a managed account. Your domain administrator may be able to access, change or suspend any projects created using this account. If you do not want your domain administrator to access your projects, please log out and create a project under an unmanaged Google Account. For more information, please review Google's Privacy Policy.

Create Cancel

4. Click on create project and open credentials. Then click on "OAuth consent screen" tab and provide the project name.
5. Then Click on "Credentials", then click on "Create Credentials" then Select "Oauth client ID".

6. Then Select "Web Application", enter `zoomConfig` page URL from salesforce under Authorized redirect URIs 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.
**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.

![New Event Form](image)

**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. “Start Zoom Meeting” global action can also be used to Start Instant Zoom Meeting

You can start the zoom meeting with the “Start Zoom Meeting” action from Contact, Lead, Case, Service Appointments (if field service feature is enabled) and Event objects as of now.

Step 5. 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.

Step 6. 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 7. 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”.

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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 last one month Zoom Meetings in the organization, 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 error.
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.
Procedure of Entering time in Event

Creating Event in Classic

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

<table>
<thead>
<tr>
<th>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.

Frequently Asked Questions

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

2. **Some meetings which are scheduled outside of salesforce are not synced. Where can I see?**
   **Sol:** You will find such meetings on “External Zoom Meetings” tab.

3. **From which objects can we start zoom meetings?**
   **Sol:** Meetings can be started from Lead, Contact, Case and Event. (Service Appointment if Field Service Lightning feature is enabled).

4. **From where can I start the zoom meeting?**
   **Sol:** Zoom meeting can be started from the Global action available in the chatter actions and the buttons added on the page layout.

5. **On the configuration page, is google settings are optional?**
   **Sol:** Yes. They are optional. If you want to sync zoom meetings to Google Calendar too, configure them.

6. **What is login type on the configuration page?**
   **Sol:** Login type -Select one of them (Work Email, Google, SSO or Facebook)
   Select how you login to Zoom.us.