SALESFORCE TO ZOOM CONNECTOR

Setup Guide for the Salesforce Administrator

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APPLICATION LICENSING

Known Issues

1. When Deleting a meeting, Zoom does not send out an email to notify invitees that the meeting is Cancelled.

Workarounds

Deleting a meeting - You can delete a meeting from the Zoom server. Once done on the server then all invitees will be notified.

ZOOM APP CONFIGURATION

To get the Zoom AppExchange Product ready for use within your Salesforce instance, follow the instructions listed below after installation on your Salesforce Org.

Org Settings

CAUTION: Perform this step first before installing the package, else you will get errors with package installation.

When a Zoom meeting/webinar is scheduled for a Lead/Contact, Salesforce creates an event associating it with the invited Leads/Contacts.

To allow associating multiple Contacts to be related with Events check the setting below:

- From **Setup** search for Activity Settings. Click **Activity Settings** item.
- You will find a checkbox towards the end of the page: *Allow Users to Relate Multiple Contacts to Tasks and Events*. Check it if not already checked.

CAUTION: Once checked, it cannot be unchecked again, hence make sure you do not hamper your Org's existing settings.

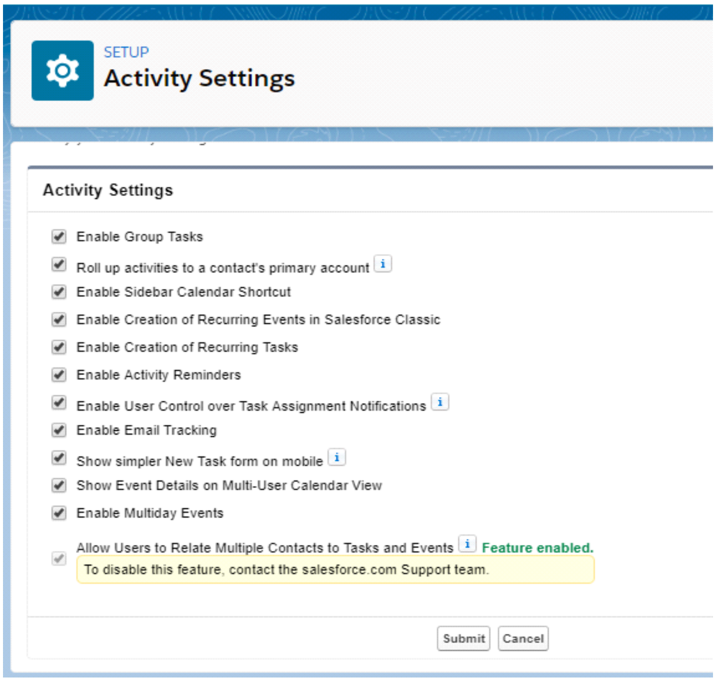


Figure 1. Allow Users to Relate Multiple Contacts to Tasks and Events

- Click **Submit**.

Register Domain

If you want to use the Zoom Meetings App in Salesforce Lightning Experience and you have not set or created a Domain already, you must create it in order to make the Lightning Components work.

If you wish to use the application in Salesforce Classic, or you have a domain setup already, you can skip this step.

- From **Setup** search for My Domain and click on the **My Domain** item.

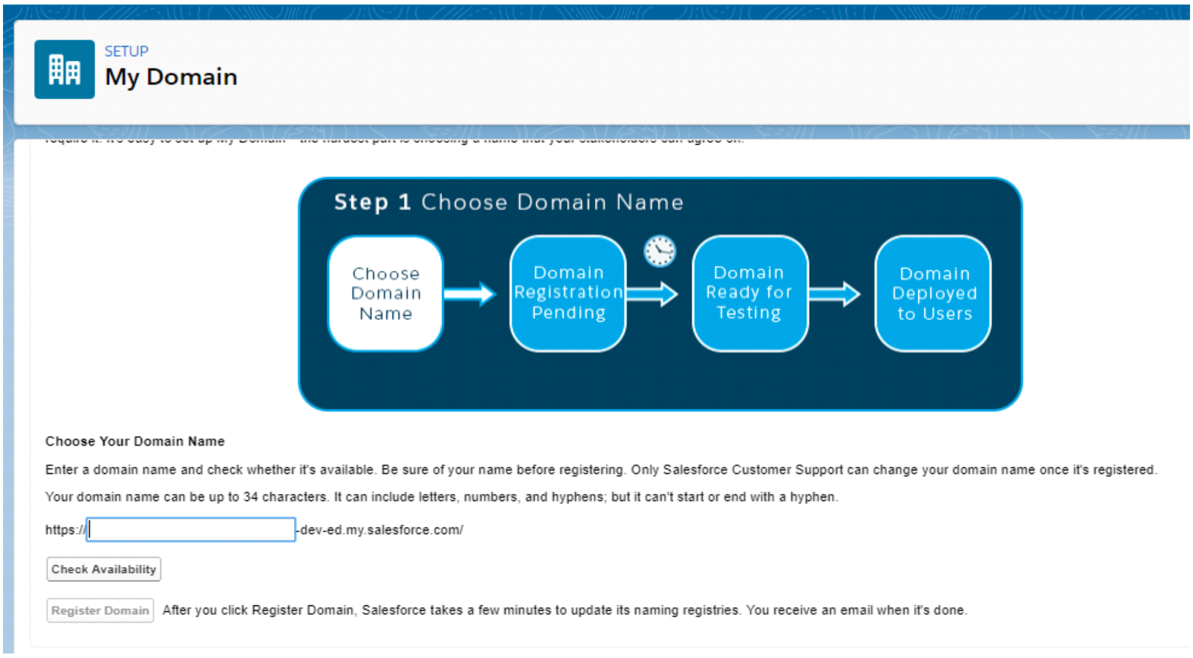


Figure 2. Register Domain

- Enter a domain name of your choice and click **Check Availability**.
- If the domain name is **available**, click **Register Domain**. If not available, try another name.

  Note: It may take a few minutes to register the domain after clicking Register Domain.

Once your domain is registered, proceed to the next step.

Site Security Setting

Register Domain for Sites

In case you do not have a Salesforce Site Domain registered already, you must create it as per steps listed below. If you have a Site Domain, you will be directly taken to an interface allowing you to create a Site. If so, proceed with site creation.

- Click **Setup** and search for *Sites*. Click on the **Sites** menu item.

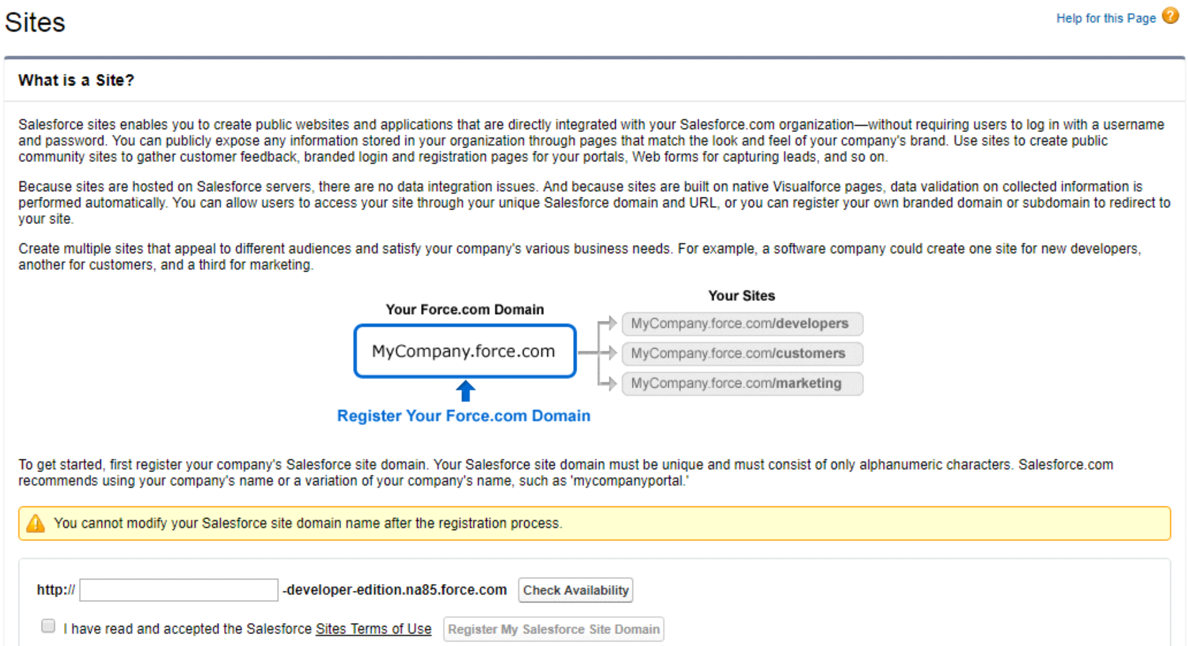


Figure 3. Register Domain for Sites

- Enter a site domain name of your choice and click Check Availability.
- If the site name is available, check the terms of use checkbox and click Register My Salesforce Site Domain. If not available, try another name.

Note: It may take few minutes to register the site domain after clicking Register My Salesforce Site Domain. You cannot modify this later.

- Activate the site by clicking Activate button next to the site URL once the site is created and listed under Sites.

Creating a Site

Once the Site Domain is registered, proceed to the next step to create a new Site.

- Click **New.**
- Fill the form to create the new Site. *Choose SFZoom_ConfigParticipation* from the lookup of the active site page.

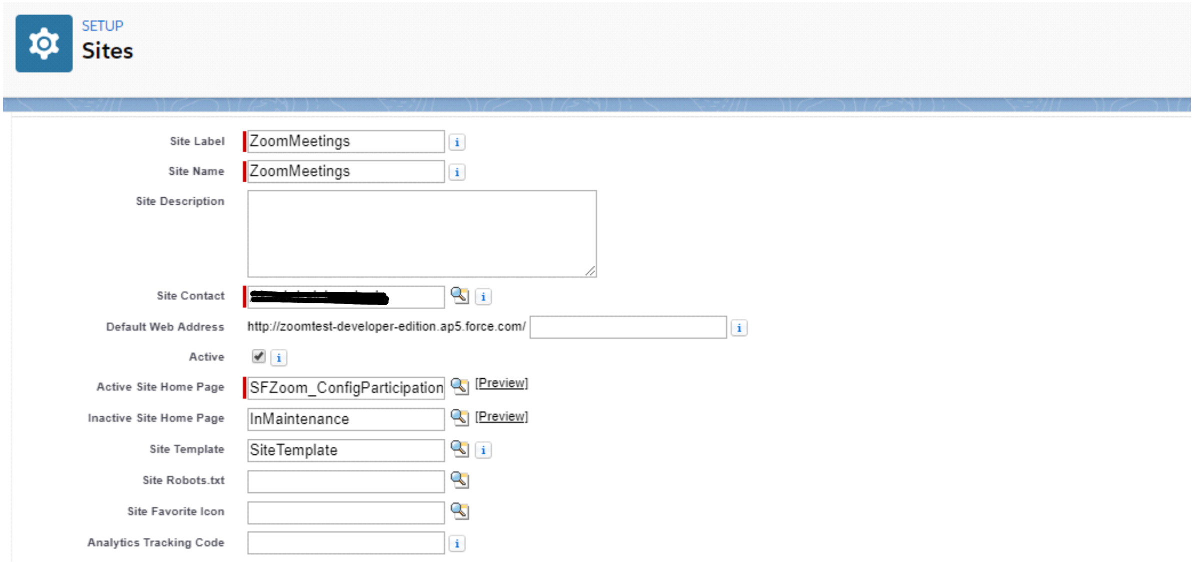


Figure 4. Site Creation

- Once the site is created, you will see the Site name below the Site Label. For example, *ZoomMeetings* as shown in the image below. Click **Activate** from the action column to activate your site.

Site User Access Settings

To provide the required access to the site users (participants who would come to this site to register themselves for the meetings/webinars) perform the following settings:

- Click on the **Site Label** of the Site created in the previous step. In this case, *ZoomMeetings.*

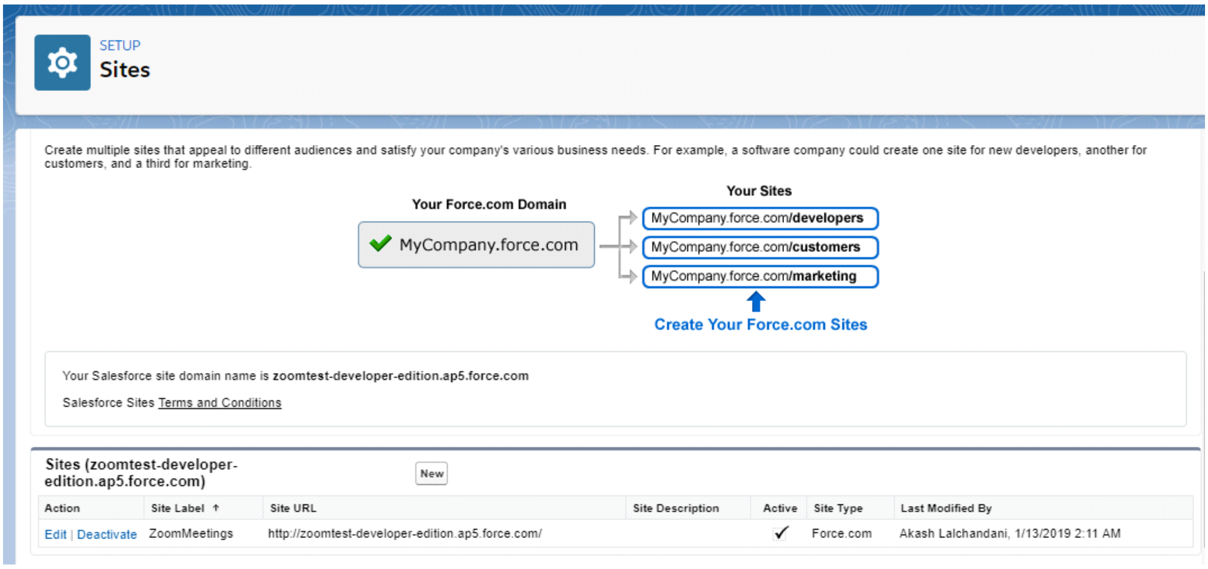
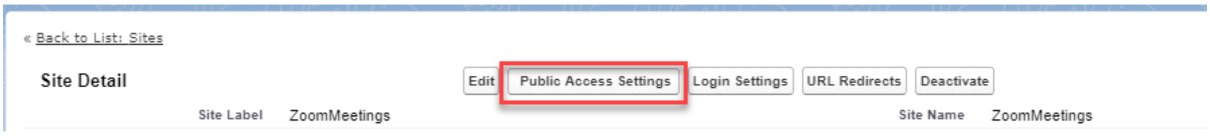
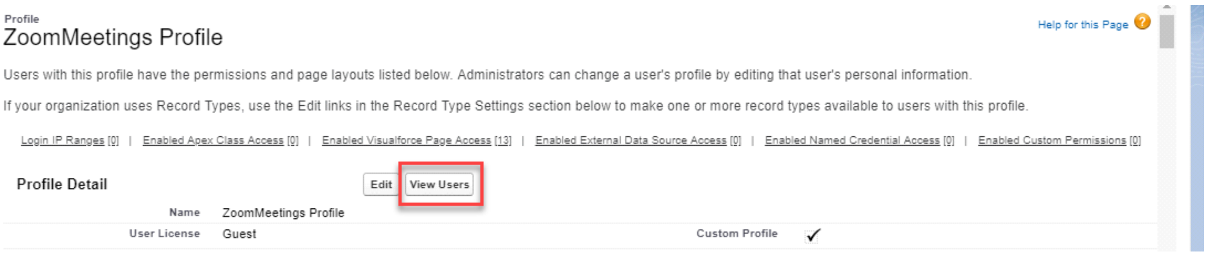


Figure 5. Site List

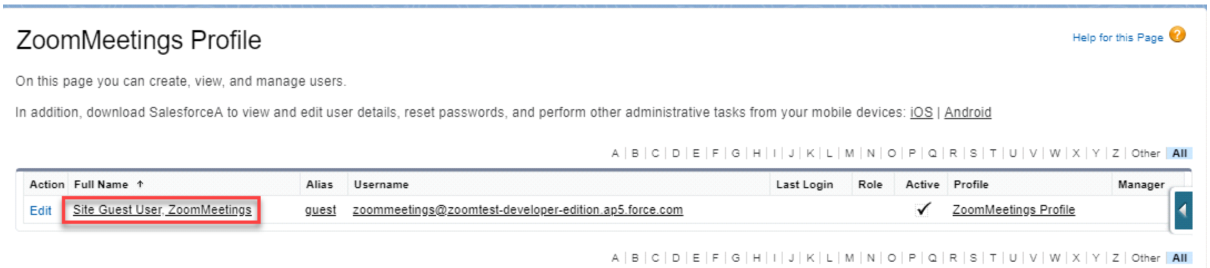
- Click **Public Access Settings** on the Site detail page.



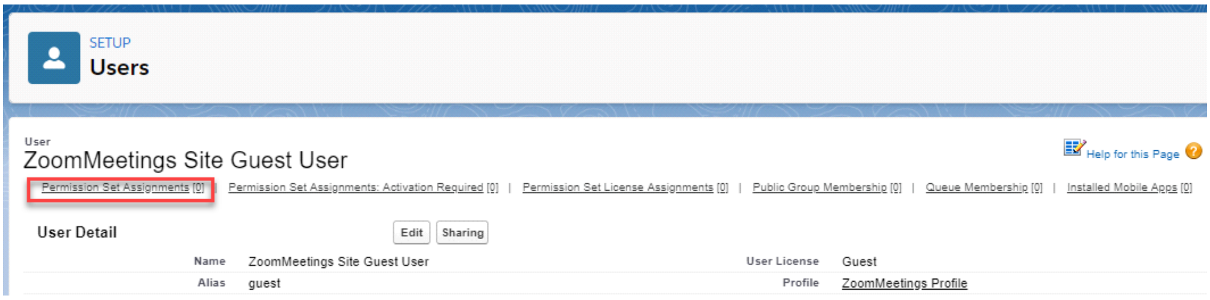
- Click **View Users** on the Profile screen.



- Click on the **Full Name** of the **Site User**.

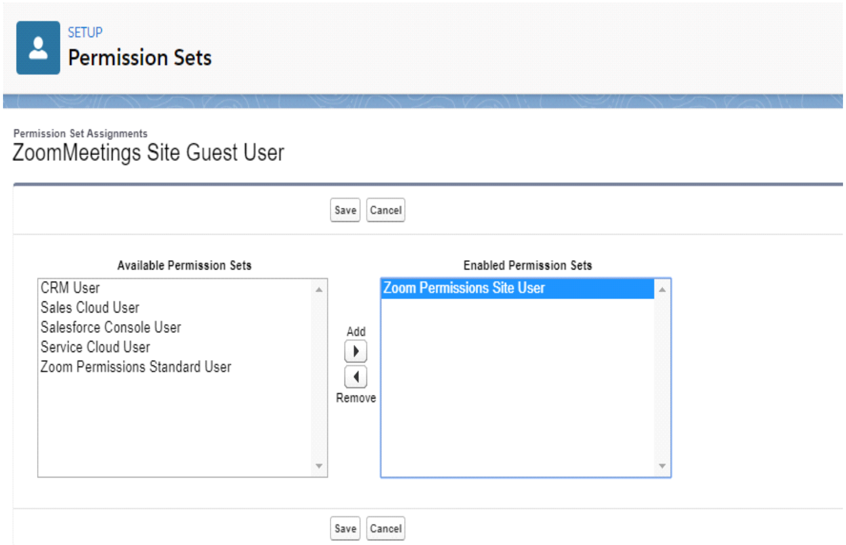


- Click **Permission Sets Assignment** or scroll down to down to **Permission Sets Assignment**.

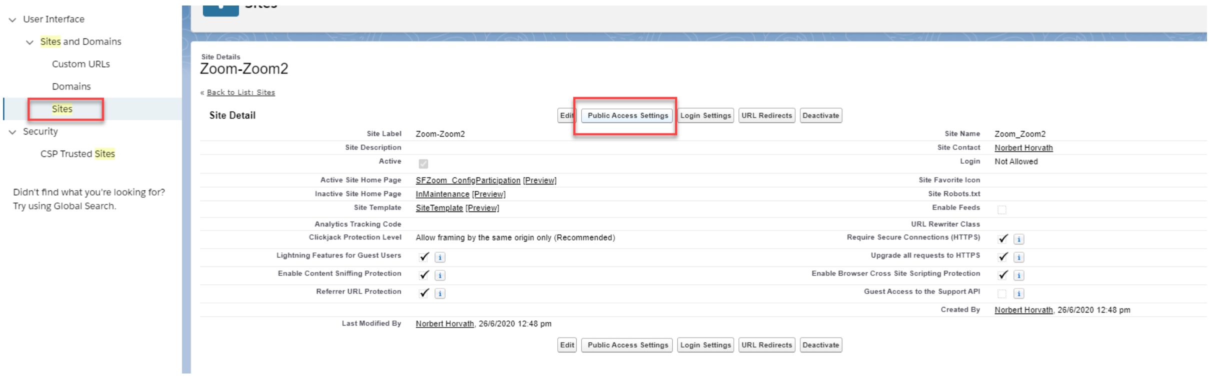


- Click **Edit Assignments**.

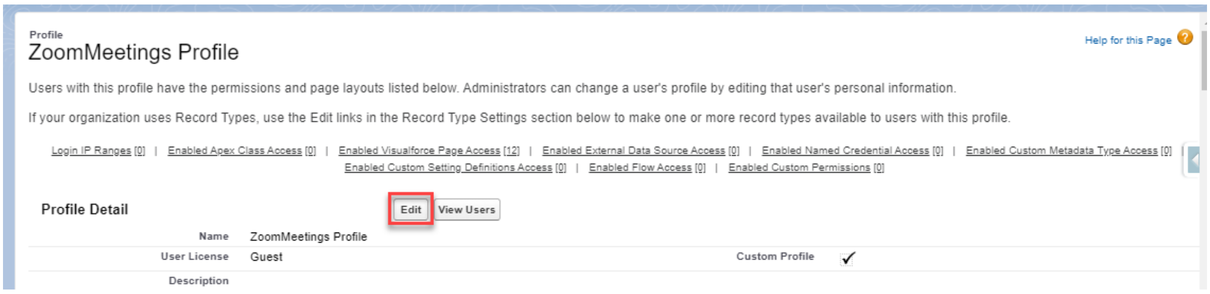
- Assign Permission Set: *Zoom Permission Site User* and **Save**.



Return to the Zoom Profile by either going back through the previous pages or **Sites** > Choose Site created > Public Access Settings.

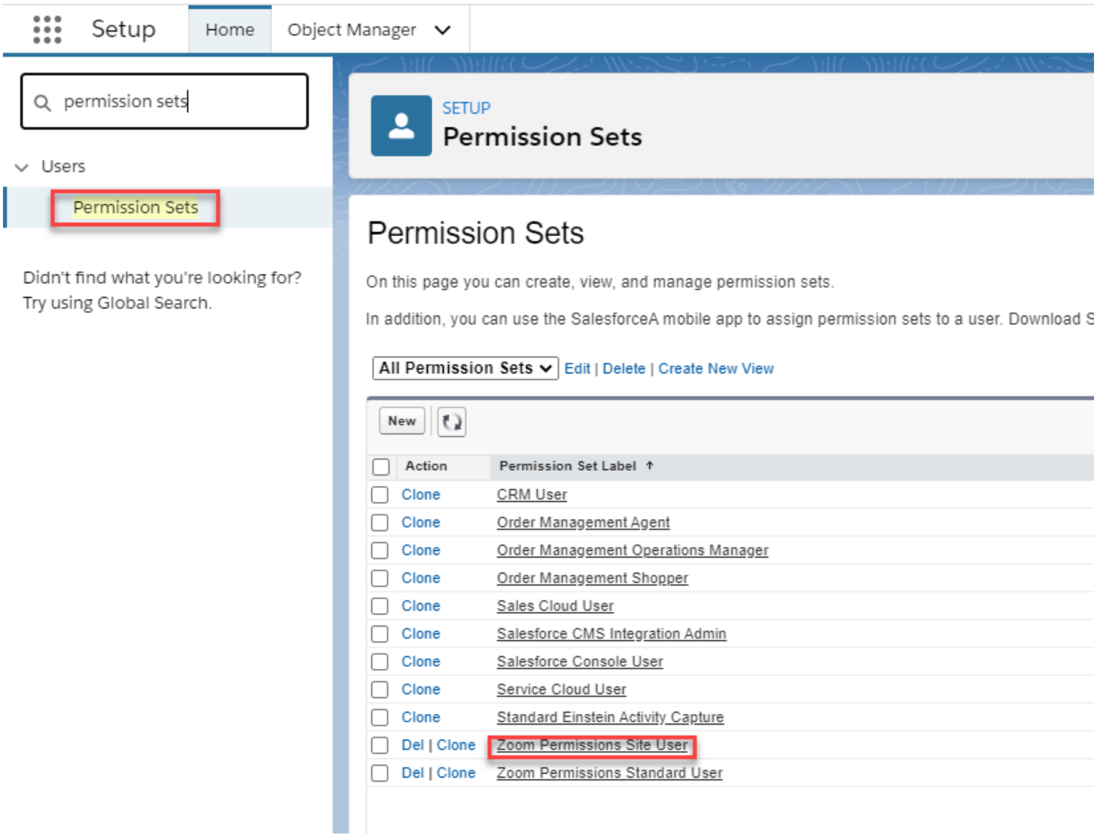


For the Guest Site user profile (ZoomMeetings Profile), to assign general permissions to the user, Click **Edit.**

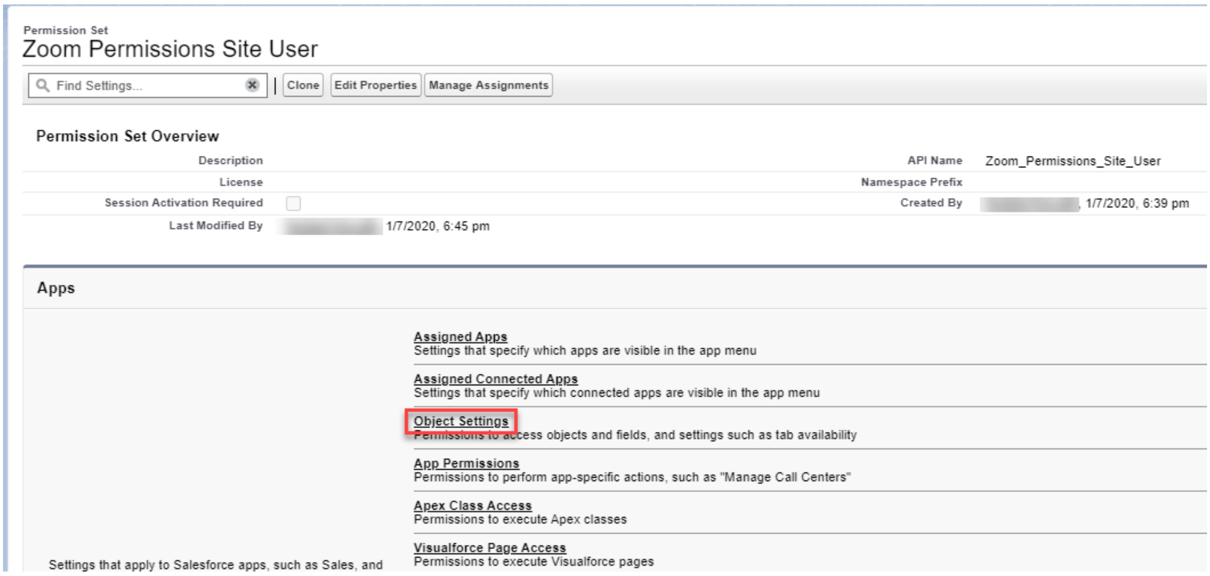


Scroll down to **General User Permissions** and check the following permissions:

Assign **Read Access** to **Contact** Object for Permission Set: **Zoom Permissions Site User.**

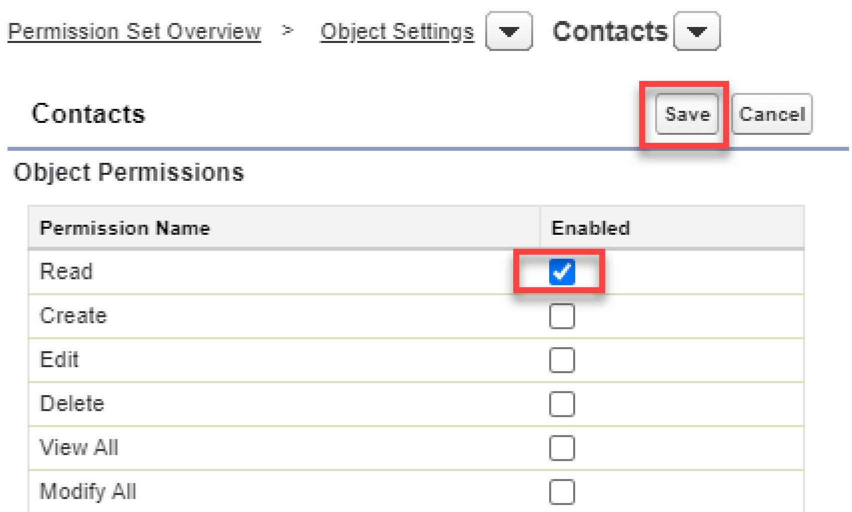


Select **Object Settings**.



Select **Contacts** Object and **Edit** the Object Permissions.

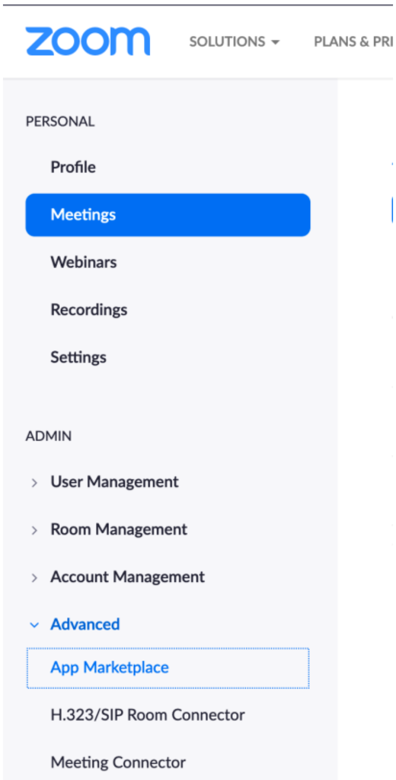
Enable the **Read** Permission Name and Save.



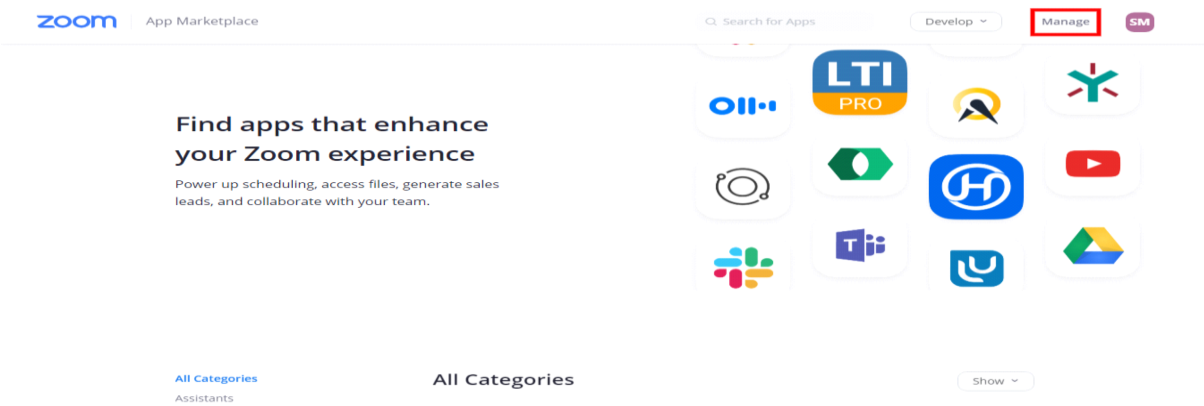
API and Meeting Settings

To setup the Zoom developer account and get the API endpoints:

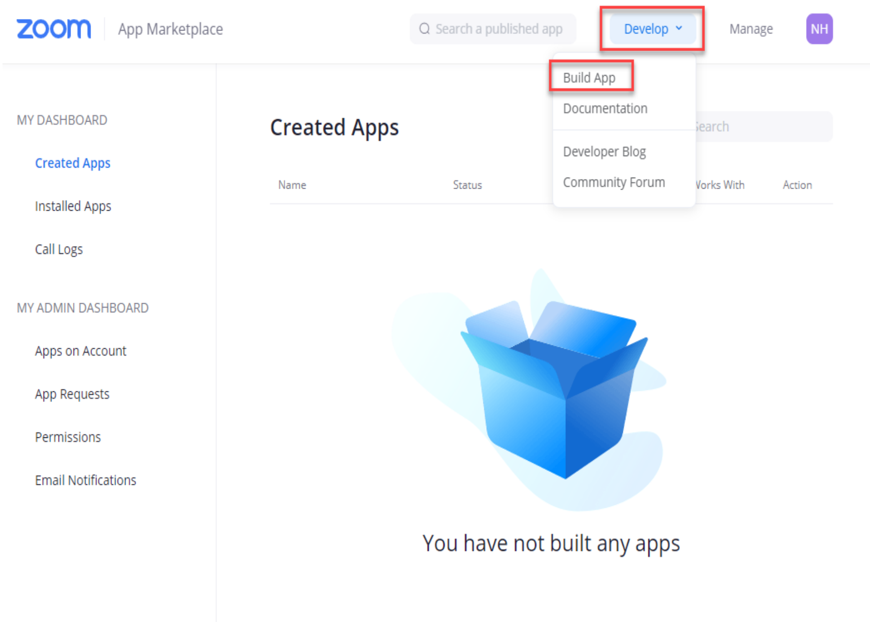
- Login to the https://zoom.us/ with your developer credentials.
- Go to Admin → Advanced → App Marketplace menu item from menu navigation (see screenshot)



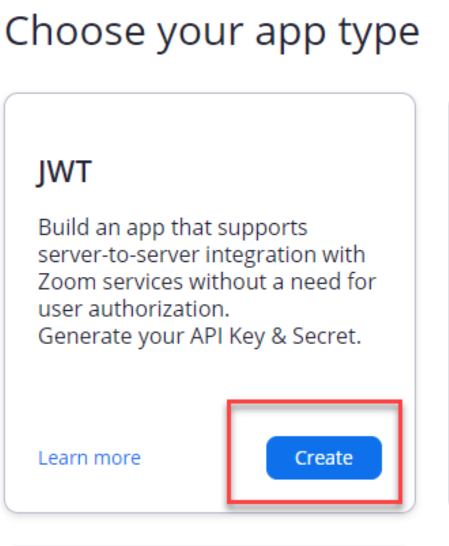
- Once you're redirected to Marketplace URL, click on Manage button (Please find below screenshot)



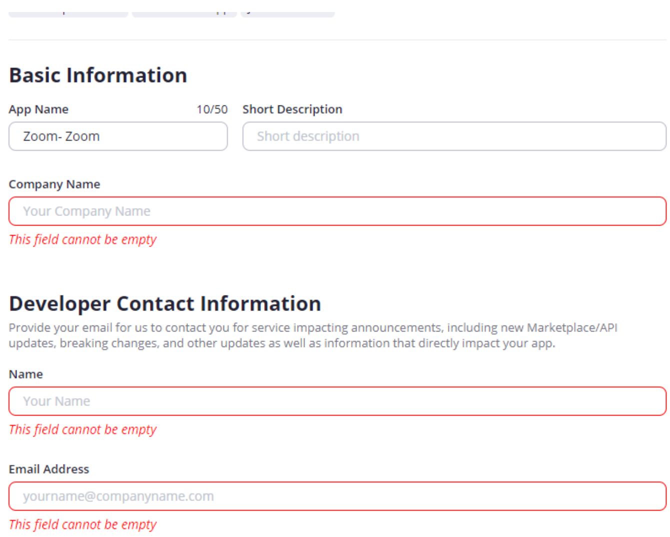
- To now redirect to the Developer page, please click on developer.zoom.us
- If there is no current JWS App, build one by going to Develop > Build App.



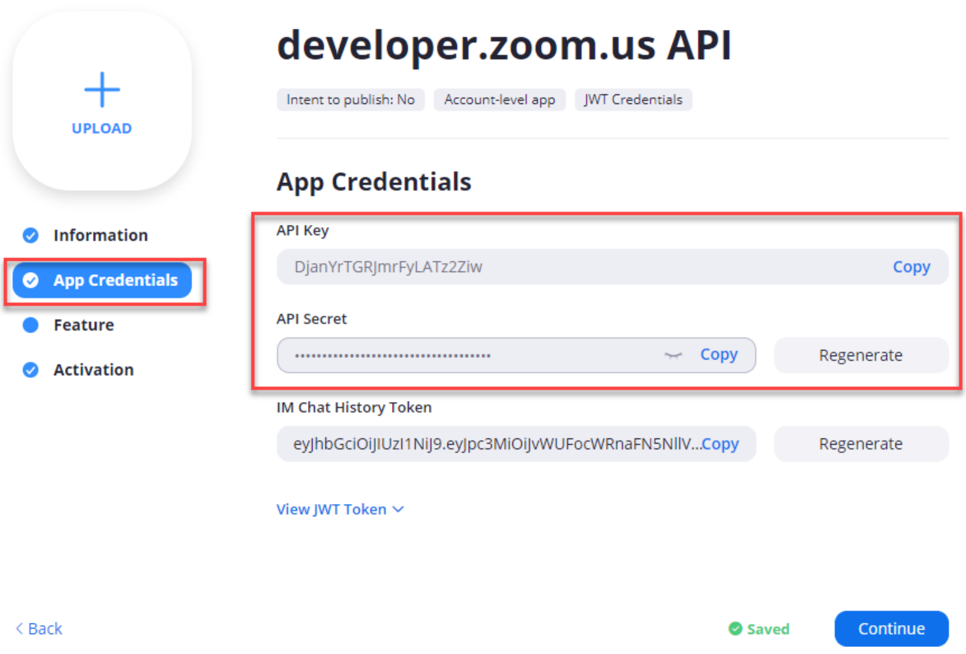
- Create a JWT App and Name the App.



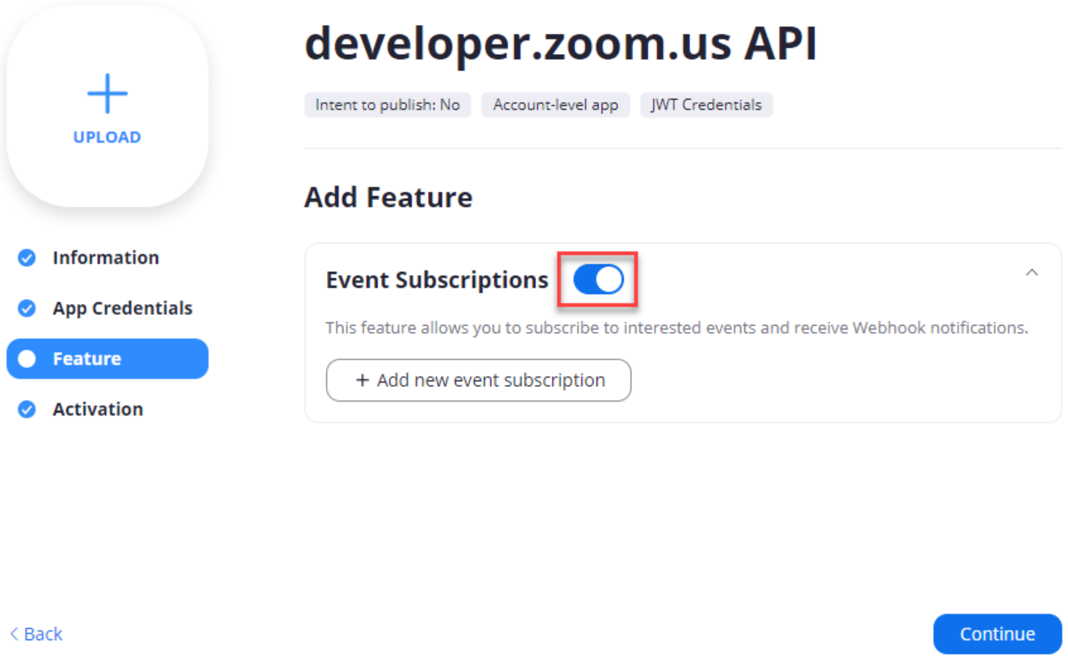
- Fill in the required information.



- Click on App Credentials, to access the API Key and API Secret



- Navigate to the **Feature Tab** to configure the call back *URL* to capture the meeting events.



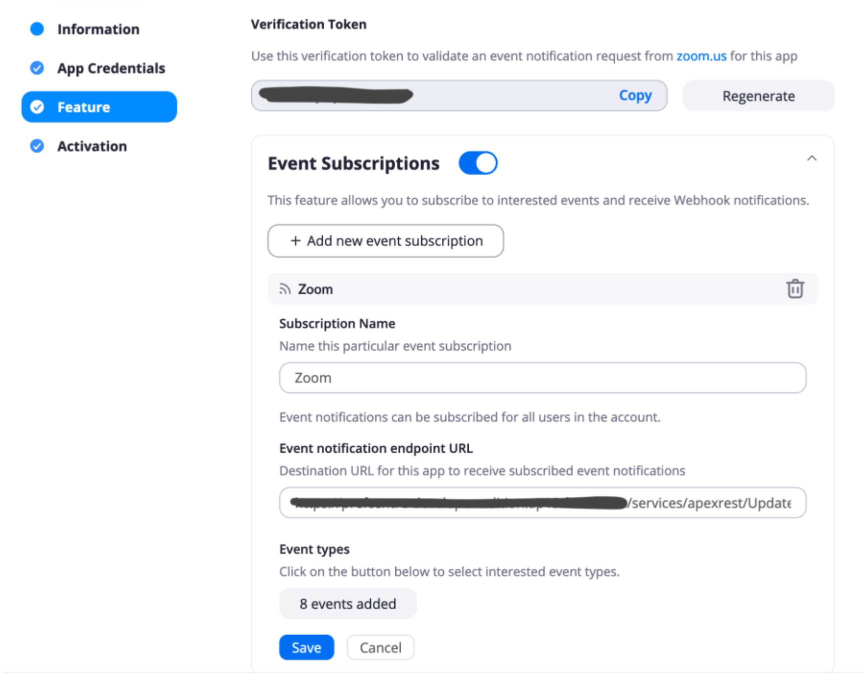


Figure 6. Feature

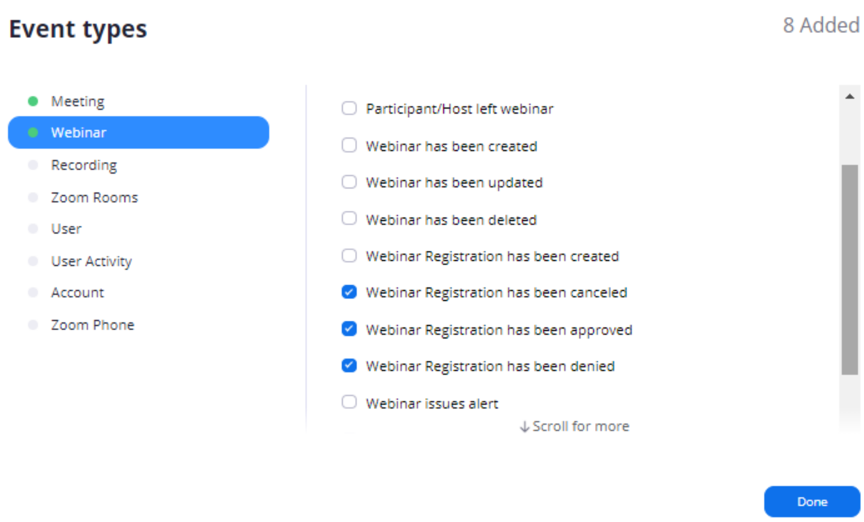
Enable Event Subscription and Add new event subscription.

- Specify the Name
- Endpoint URL: <Your Site URL>/services/apexrest/UpdateMeetingParticipantsDetail.

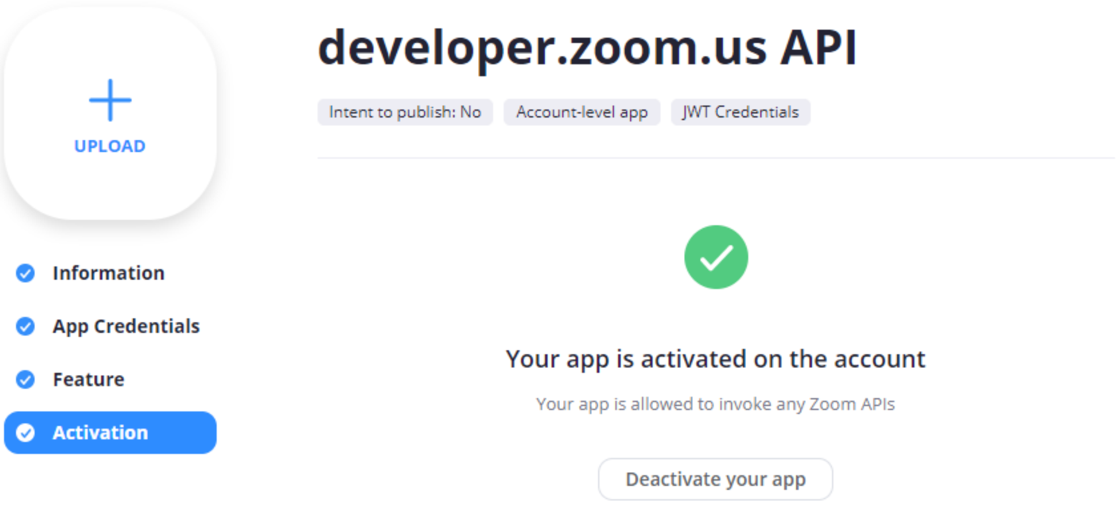
  Copy the value for <Your Site URL> and append it with /services/apexrest/UpdateMeetingParticipantsDetail.

Salesforce Site URL can be found back in Salesforce in Setup > Sites

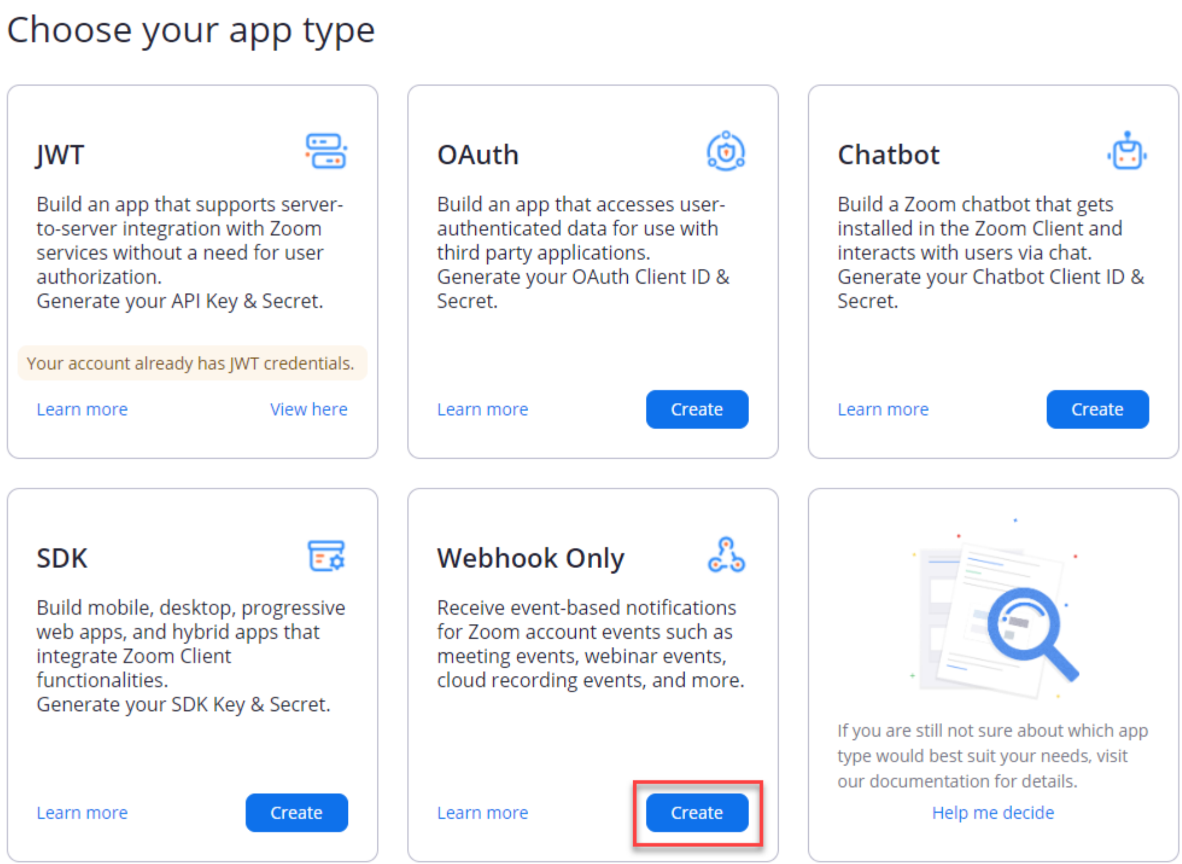
- Event types as follows:
  - Check the **Event types** as
  - Meeting >> End *Meeting, Meeting Registration has been cancelled, Meeting Registration has been approved, Meeting Registration has been denied.*
    - Webinar >> *End Webinar, Webinar Registration has been cancelled, Webinar Registration has been approved, Webinar Registration has been denied.*



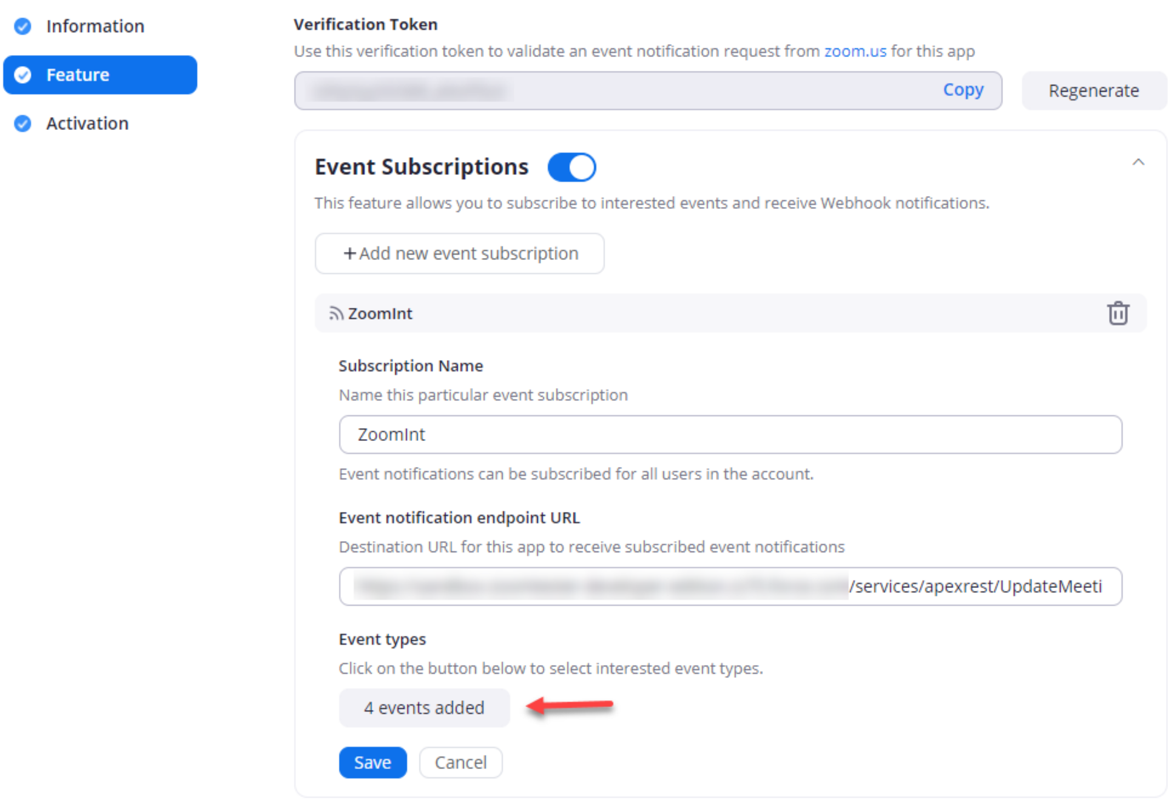
- Select **Done** and **Save**.



We will also need to create an additional Webhook Only App referring to the steps previously: Develop > Build App and Select Create on Webhook Only. This Webhook will allow Zoom the write back to Salesforce and update the Attendee's record when the meeting ended.



Name the App and Fill in the necessary/required fields as done previously on previous App.



In the Featured Section Add in the same Event notification endpoint as in previous App and Select Event Types:

Meeting: **End Meeting, Meeting Registrant has been canceled**

Webinar: **End Meeting, Meeting Registrant has been canceled**

Done.

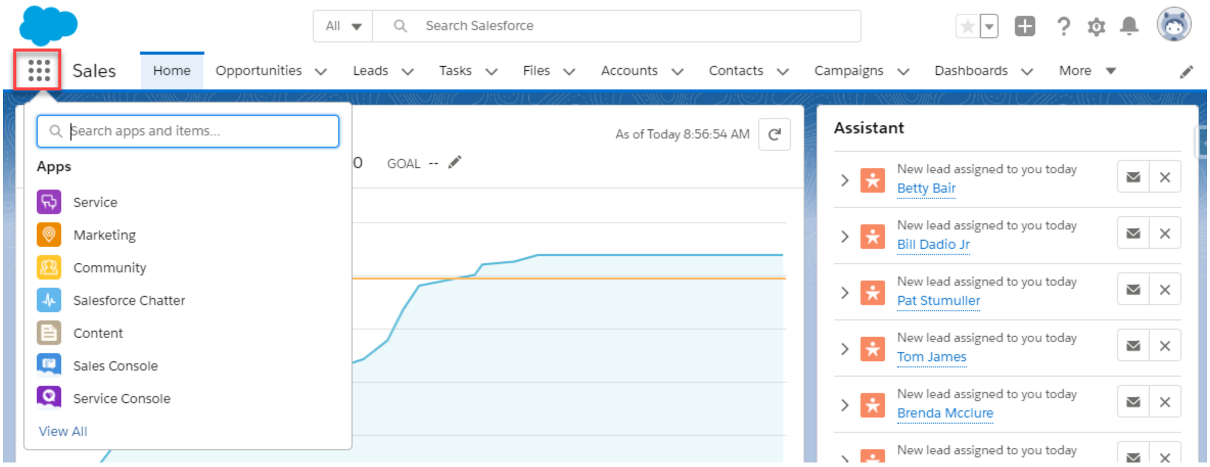
Save and Activate the App.

Return the JWT App that was created first and bring up the API Key and API Secret, while returning to Salesforce. This will be needed for the next step.

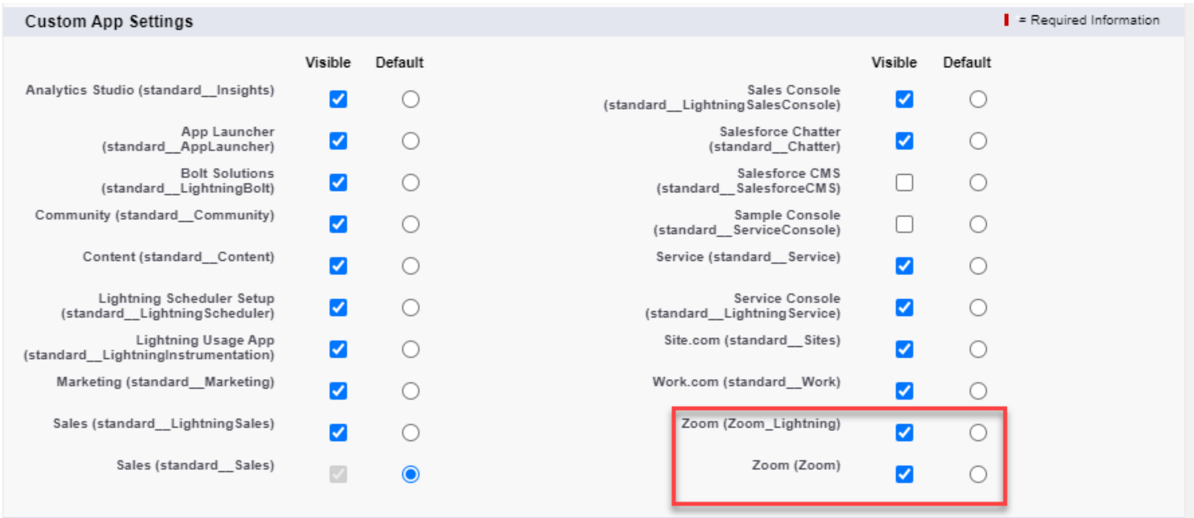
Figure 7. Event Types

To configure the API endpoints on Salesforce Org:

- Click on the **Zoom Settings** Tab. (If you do not find a Zoom Settings tab, go to the App Launcher and search for Zoom Settings)



If you still do not find the Zoom Setting Tab, Go to Setup > Profiles > Your Profile e.g. System Administrator > Edit > Section: **Custom App Setting** tick both Zoom (Zoom_Lightning) and Zoom (Zoom) Visible Column.



Scroll down to the Section: **Tab Settings** > Custom Tab Settings update to Default On for both **Zoom Meetings** and **Zoom Settings** and Save.

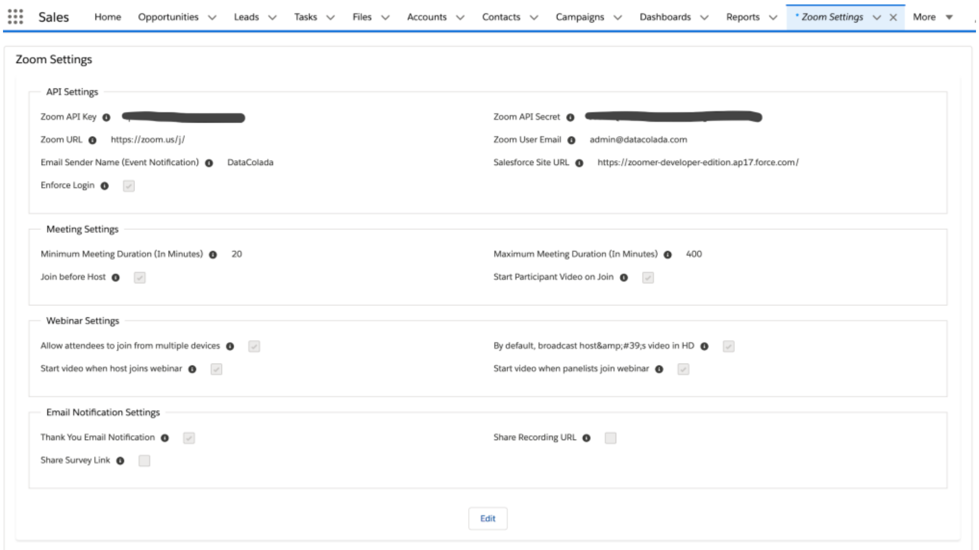
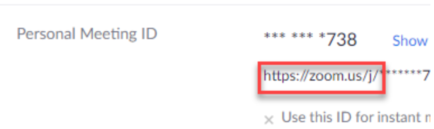


Figure 8. Zoom Settings Page

- This will open a Visualforce page allowing you to add the necessary configuration for API, Meeting and Webinars. Add relevant information and click **Save.**
- To edit it again, click **Edit** button at the bottom. It will open the page in editable mode allowing you to update the configuration.
- **Zoom API key** and **Zoom API Secret** can be found in Zoom on the App Credentials tab.
- **Zoom URL** can be found in Zoom Personal > Profile:



- **Salesforce Site URL** can be found in Salesforce: Setup > Sites
- **Zoom User Email** can be found on Profile: Sign-In Email (Account Email)

Object Settings

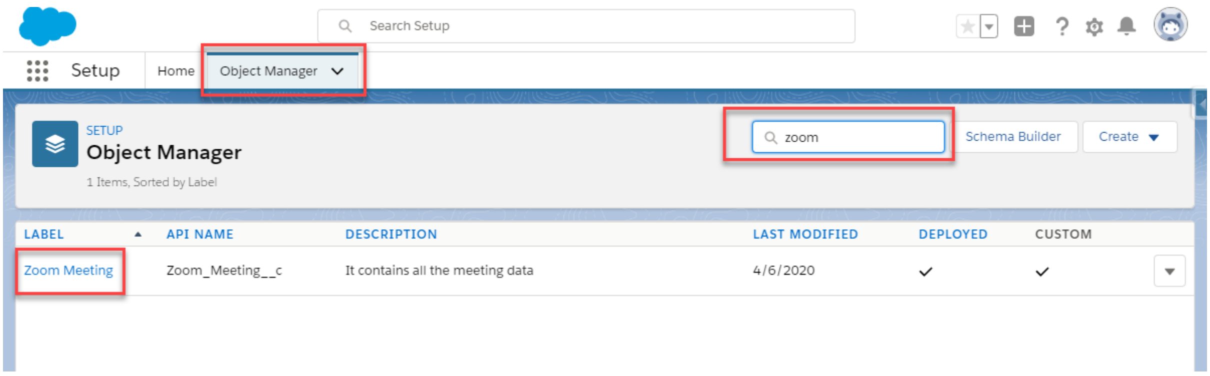
To add a Zoom meetings section for creating meetings from an object record screen, relevant object level configurations are required. These configurations involve creating a custom lookup field on the zoom meetings object and adding some metadata.

Create Lookup

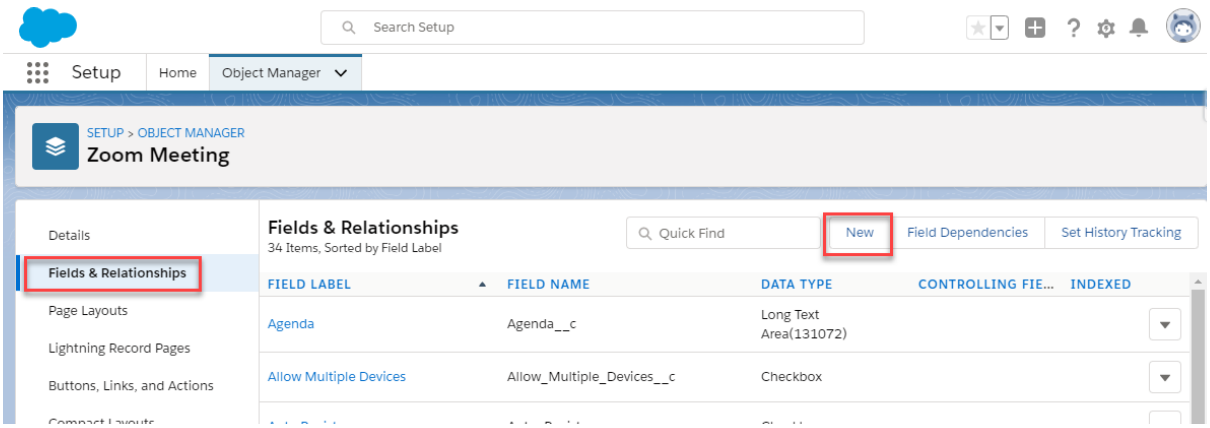
A lookup field on Zoom Meetings will have to be created for the object where Zoom meetings will be setup.

For demonstration, we will setup the Zoom meetings on Account Object. To create a lookup relationship on Zoom Meeting related to *Account* follow the steps below:

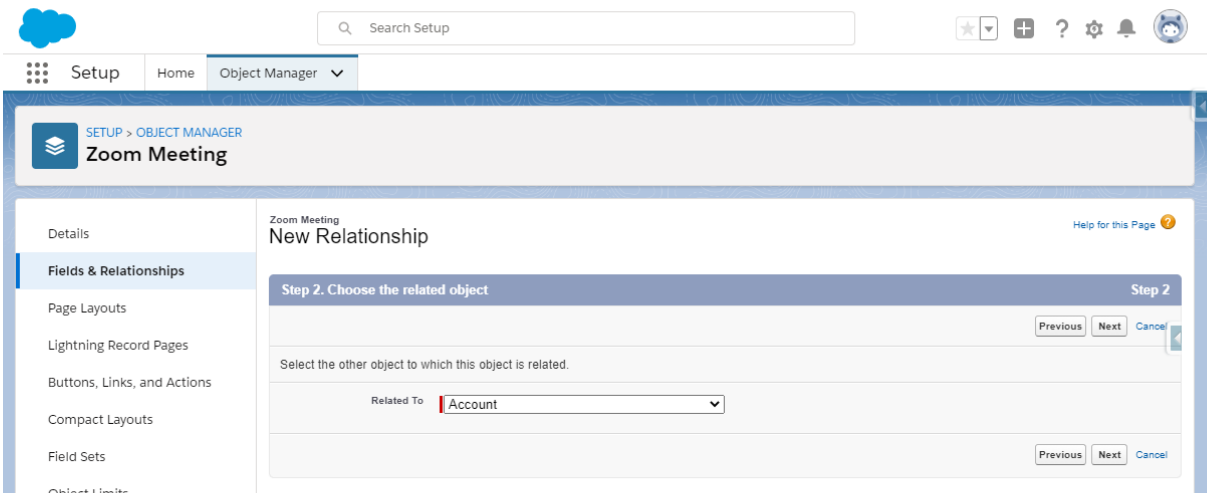
- Go to **Setup** and under Object Manager, choose *Zoom Meeting*.



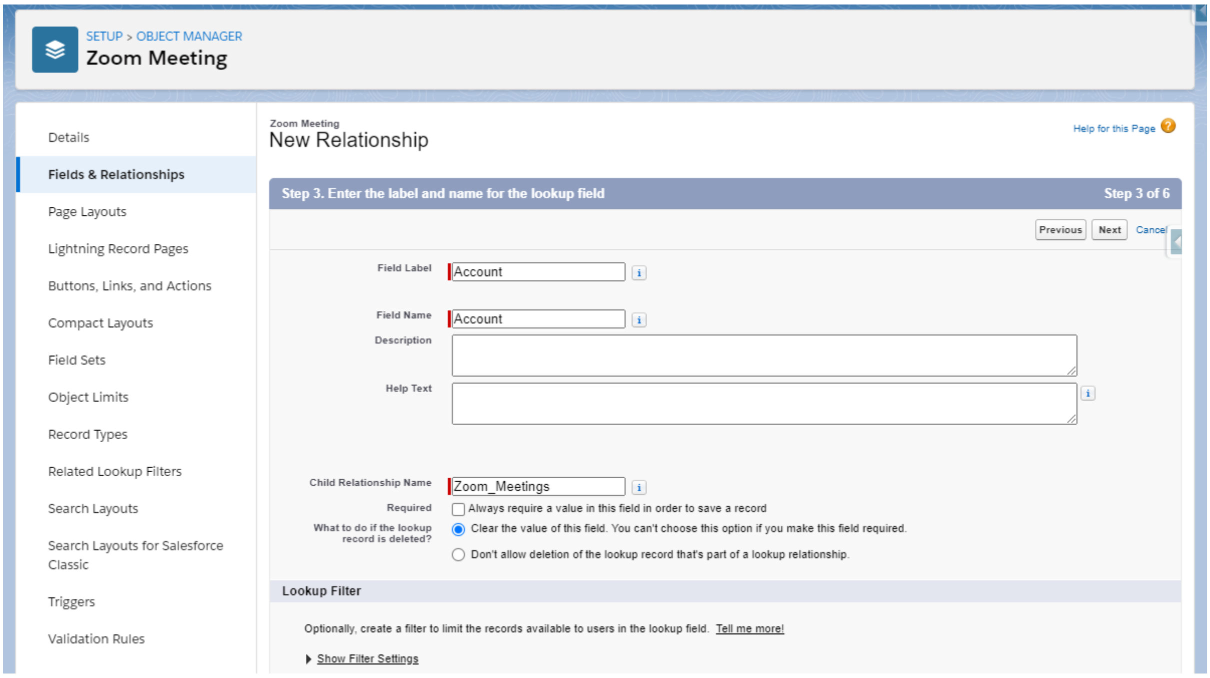
- Go to **Fields & Relationships** and click **New**.



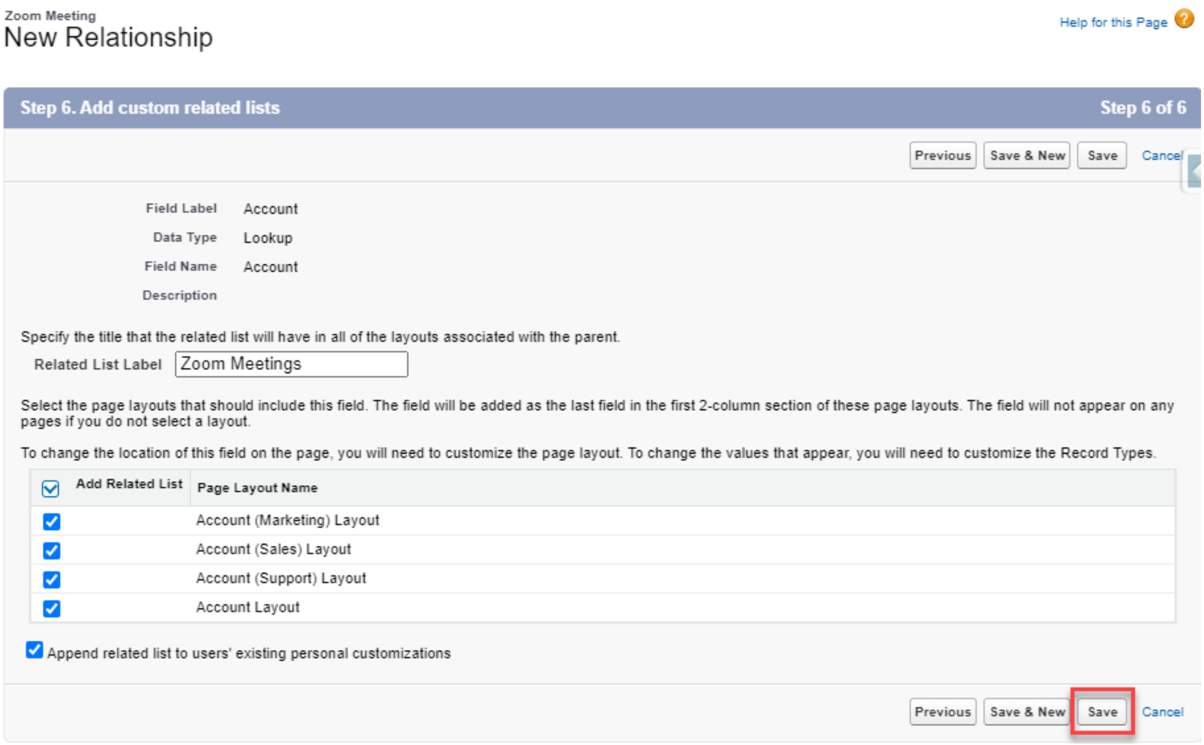
- Select the data-type of the field as **Lookup Relationship**, click **Next**.
- Select *Account* (Object on which you want to setup Zoom meeting) from the **Related To** picklist, click **Next**.



- Enter the Label name for the lookup field, click **Next**.



- Assign relevant field level security based on your user access, click **Next**.
- Check the required layout that should include this field, click **Next**.
- Assign a **Related List Label** that will appear in the *Account* Object.



Zoom meetings will appear in the related lists of the Object you are setting it up for with the label you assign here.

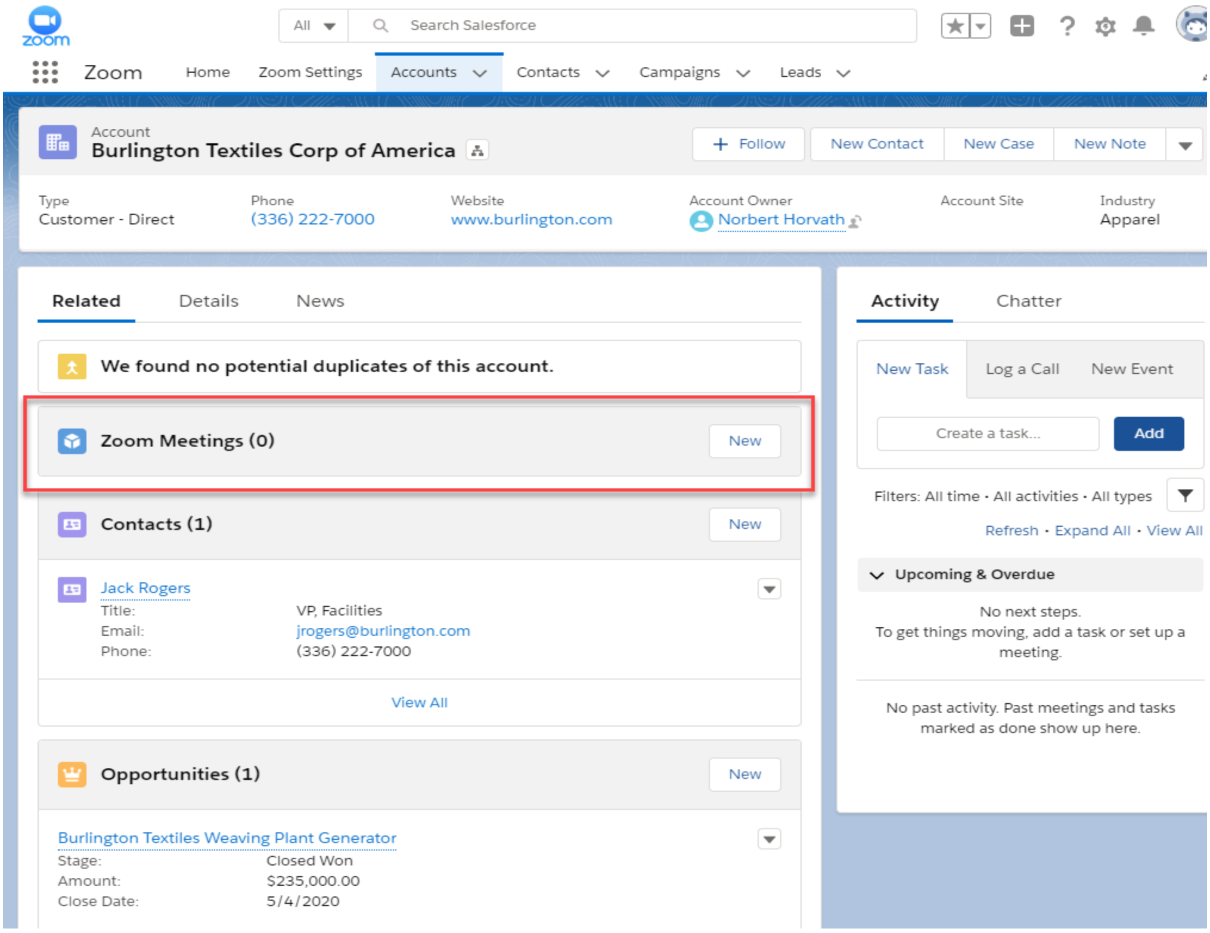


Figure 9. Create Lookup Step-Related List Label.

Create Zoom custom metadata record

Note: The Object settings are already performed for the Campaign Object so you will not have to create a new custom metadata record. The below example has already been created as the Campaign Meeting Settings.

Once you have created a lookup field on Zoom Meetings, the next and final step is to create the metadata in order to start using the application.

To create a new custom metadata record, perform the steps below:

- Go to **Setup** and search for **Custom Metadata Types**.
- Search for the metadata type *Zoom Metadata*, click **Manage Records.**

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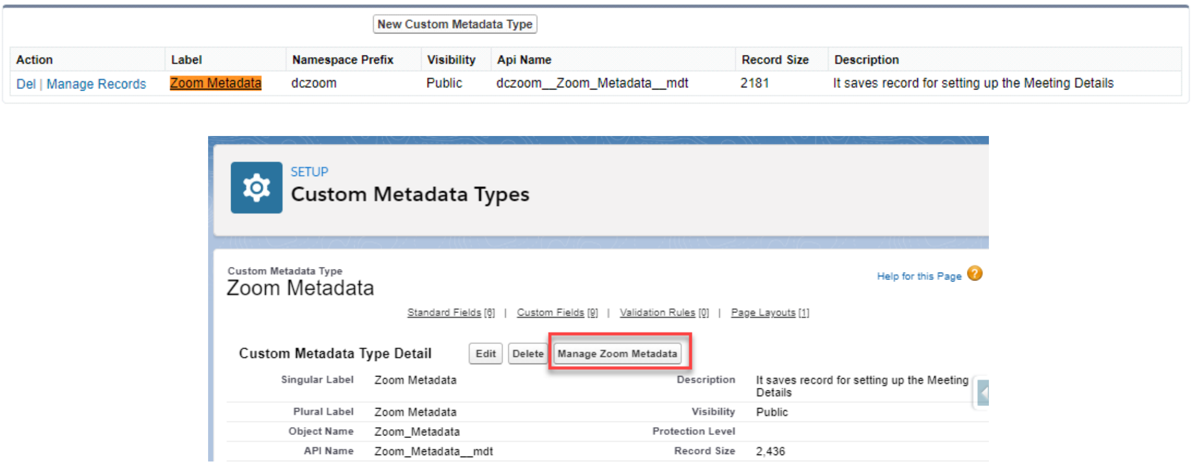


Figure 10. Create Metadata (1/2)

- Click **New**.
- Add the details as follows based on the object you are setting up Zoom meetings.

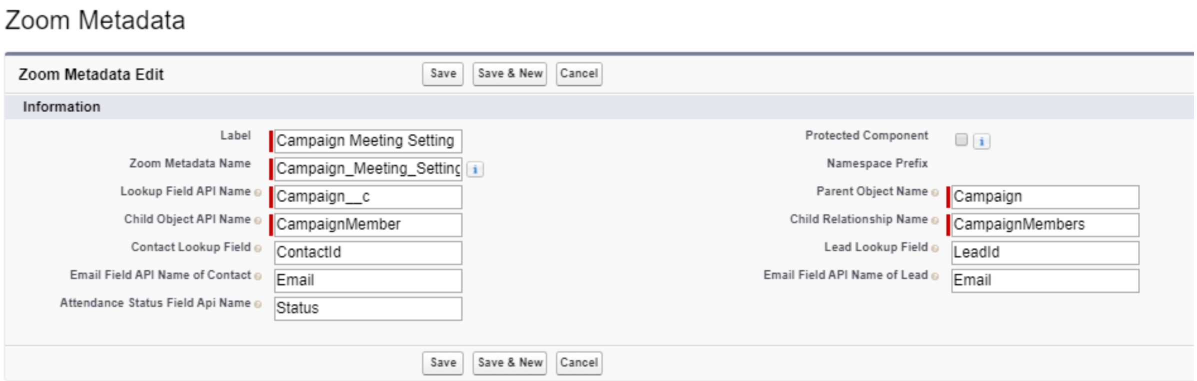


Figure 11. Create Metadata (2/2)

- Click **Save**.

Note:
- **Lookup Field API Name** is the API name of the lookup relationship created in section Object Settings → Lookup. In the previous step this is Account__c.
- **Attendance Status Field API Name** is optional and if specified the Attendance status will be cascaded to the child object from where the request was initiated (In the case of Campaign implementation, it's CampaignMember)
- In case of status cascade, make sure the following values exist at the Status API field referenced here - **Attendance Status Field API Name**.
  - Attended
  - Not Attended
  - Cancelled

Note: The Object settings are already performed for Campaign Object as a part of the package and hence you can perform it on any other object with the help of settings mentioned above.

Campaign Member Status

Every Campaign can be configured for different status values. Edit the Campaign Layout and pull the Campaign Member Statues related list on the Campaign Layout. Add the new status values (Not Attended, Attended, Cancelled) for cascading zoom attendance status at campaign member.

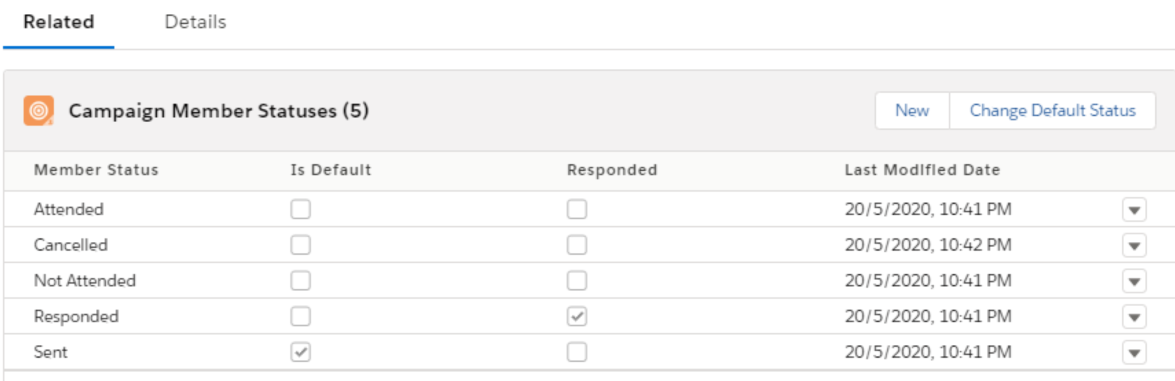


Figure 12. Campaign Member Statuses

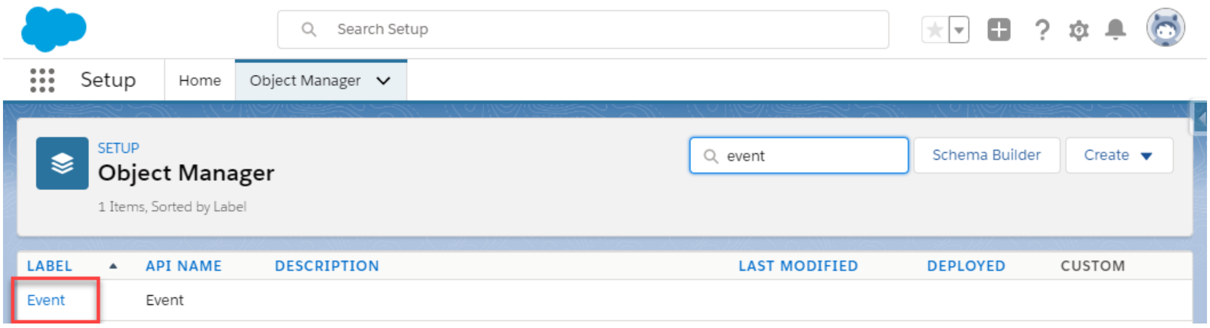
Note: Status Cascading works only when

- The campaign member is referring to a Contact and not Lead.
- The **Attendance Status Field API Name** is not null and refers to the API field name.

Event Layout Update For Zoom Fields

The Standard Event Object is used to track the Attendees, and to make the zoom registration fields visible on Event records for respective Attendees, we need to Edit the Event Layout and drag zoom fields.

- From **Setup**, go to **Object Manager** and look for **Event** in Quick Find.



- Click on the **Event**, and then **Page Layouts**.
- Click on the **Edit** of Standard **Event Layout**.

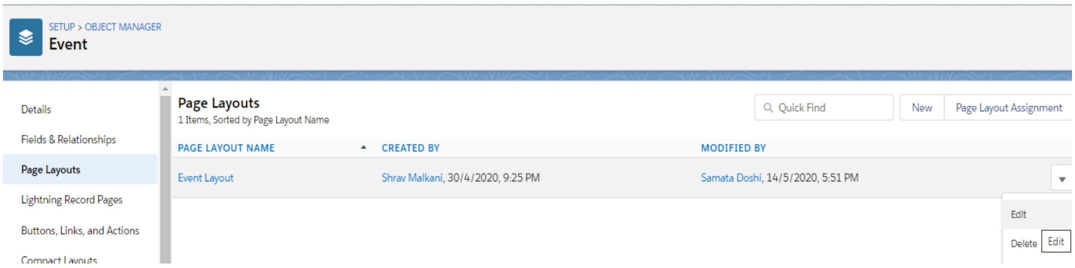


Figure 13. Event Layout

- Create a new Section called Zoom and pull the Zoom integration related field on the layout under this section.
- If you have not adjusted page layouts click here for Salesforce Trail.

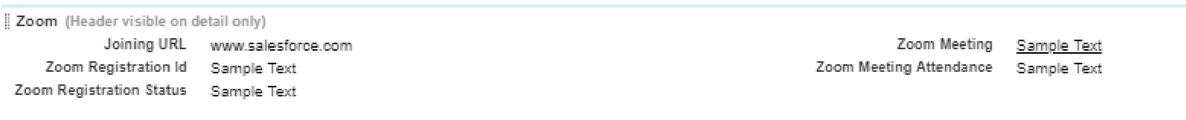


Figure 14. Zoom Event Layout Section

- Click Save.

Marketing User checkbox

To create Campaigns, check if you have the *Marketing User* checkbox enabled against your user account.

If it is not enabled, enable it using the steps listed below from a System Admin account:

- From Setup, search for *Users*. Click on the **Users** menu line item.
- From the list of users, click on the specific user's username where you want to enable Campaign creation.

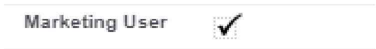


Figure 15. Marketing User checkbox

- Click **Edit** on the User record detail page. Check the *Marketing User* checkbox and click Save.

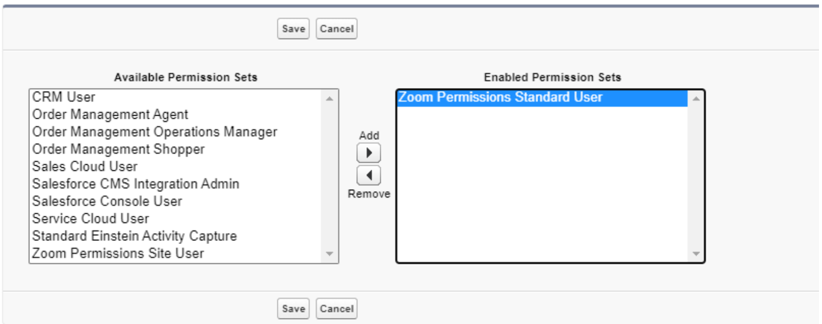
Additional User settings

In order to schedule meetings, assign the Zoom Standard user permission set to the user you want to give rights in your Org to manage meetings and webinars.

- From the **Setup**, search for Users.
- Click on the user you want to give access for managing meetings.
- Click on the **Permission Sets** on the user record detail page.
- Click **Edit Assignments**.

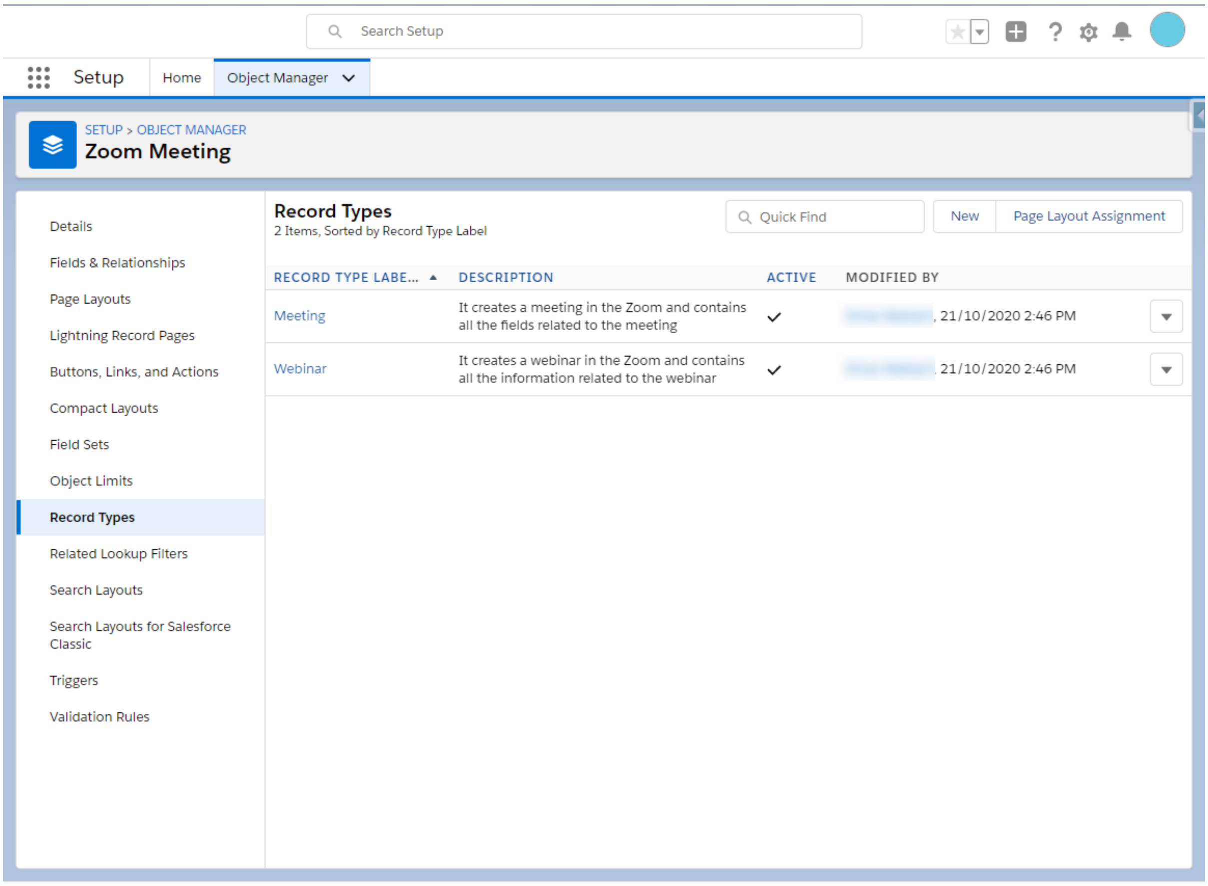
Figure 16. Zoom Permission Set Assignment

- Assign *Zoom Permissions Standard User* and click **Save**.



Additional Features

To allow only 1 record type to be created for Zoom in Salesforce e.g. Webinars. This can be done to by disabling whichever record type is not needed in the Zoom Object.



Keep in mind to review the Profile record type Defaults and access to the Record Types when updating this.

If disabling a Record type, the Profiles and Permission sets will not have access to the record type. Even if re-enabled on the object, you will have to reactivate the record type for each profile and permission set in Salesforce.

Refer to the User Guide to start using the application.