

# SALESFORCE TO ZOOM CONNECTOR

## User Guide

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# APPLICATION LICENSING

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## Known Issues

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

## Workarounds

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

# Introduction

The Zoom Meetings integrated app provides an easy-to-use interface that can be placed on any Salesforce object record. This document provides systematic set of actions to be performed by the App User to manage the Zoom meetings. The app is Lightning compatible and has a similar UI for both the Salesforce Classic as well as Lightning experience.

## Pre-requisites:

1. The User must have a Zoom license account.
2. The User must have configured the application as per the **Setup Guide**.

# Scheduling Zoom Meeting

You can schedule the Zoom meetings from the record page of the Salesforce object on which the app is configured.

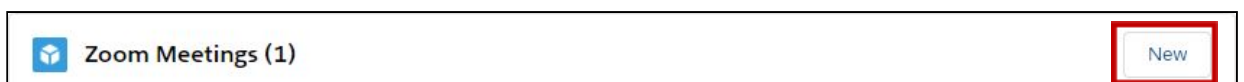
Under the related lists of the record detail page of the object, you will be able to see a **Zoom Meetings** section with a **New** button.

When you install the app, it is configured on the Campaigns object.

## Schedule a Zoom Meeting

To schedule a new Zoom meeting,

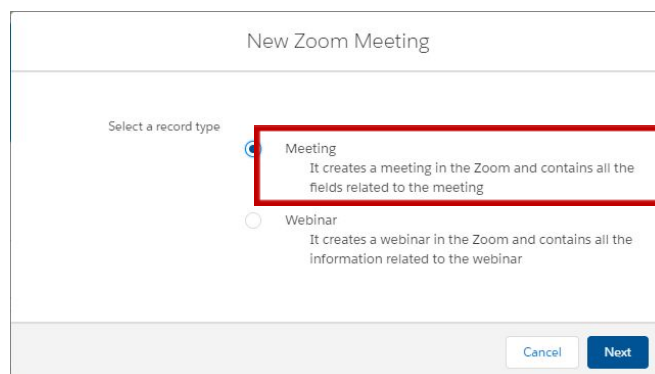
1. Scroll and locate **Zoom Meetings** list under the related list of the Object. Click **New** button.



**Figure 1. New Zoom Meeting**

Or, click on the Quick Action **Create Zoom Event** on the Campaign detail page.

2. Choose the option: **Meeting** from the radio button options on the screen/popup and Click **Next**.



**Figure 2. Choose Meeting Type**

3. Add relevant details for **Topic** and **Agenda** and choose the following:

- Meeting start date
- Meeting start time
- Meeting duration (in minutes)

Schedule a New Meeting

---

\*Topic  
 ☒ Auto Register

\*Start Time

\*Duration (In Minutes)

Agenda

\*Start Date

Meeting Configuration

☒ Enforce Login ☒ Join before Host

☒ Start Participant Video on Join

Email Configuration

☒ Thank You Email Notification

☒ Share Survey Link

☒ Share Recording URL

Survey Link URL

Recording URL

**Figure 3. Create Meeting**

4. The global configuration settings will be preset in the configuration section while creating the meeting. However, as an organizer, you can overwrite the configurations for a specific meeting at the time of scheduling.

| Configuration  | Checked   | Unchecked   |
|--|---|---|
| Auto Register  | This will register the invited participants automatically with the information stored on their Contact/Lead record. The participants will receive a private link to join the meeting. | The participants would receive an email with a link to register themselves (refer <i>Figure 8</i> ) followed by a private link to join the meeting (refer <i>Figure 10</i> ) when they complete the registration. |
| Start Participant Video on Join                      | The participants' video will be started automatically when they join the call.  | The participants' video will NOT start automatically when they join the call.   |
| Enforce Login  | Participants will be forced to create a zoom account when they join the meeting through the meeting URL.  | Participants will NOT be forced to create a zoom account when they join the meeting through the meeting URL.  |
| Join before Host                                     | The participants will be allowed to join the call before the organizer joins the meeting.   | The participants will NOT be allowed to join the call before the organizer joins the meeting.   |
| Send the invite to all the associated Leads/Contacts | Will send the meeting invite to all the Lead/Contacts associated with the object  | A relevant interface will allow the organizer to choose the Contact/Leads to whom the invite needs to be sent after the meeting is created.   |

The scheduled meetings are listed under the **Zoom Meetings** section.

| Zoom Meetings (1) <span>New</span> |                    |             |            |
|------------------------------------|--------------------|-------------|------------|
| ZOOM MEETING ID                    | TOPIC              | START TIME  | START DATE |
|                                    | Volunteer Briefing | 10:00:00 AM | 4/12/2018  |
| <a href="#">View All</a>           |                    |             |            |

**Figure 4. Scheduled Meetings**

## Schedule a Webinar

To schedule webinars, an additional pre-requisite is to procure the Zoom webinar licenses.

1. Choose the option: **Webinar** from the radio button options on the screen/popup and Click **Next**.

New Zoom Meeting

Select a record type

☐ Meeting  
It creates a meeting in the Zoom and contains all the fields related to the meeting

☒ Webinar  
It creates a webinar in the Zoom and contains all the information related to the webinar

Cancel Next

**Figure 5. Choose Meeting Type**

Or, click on the Quick Action **Create Zoom Event** on the Campaign detail page.

2. Add relevant details for **Topic** and **Agenda** and choose the following:
  - Webinar start date
  - Webinar start time
  - Webinar duration (in minutes)

Schedule a New Webinar

---

\* Topic  
 ☒ Auto Register

\* Start Time  
  \* Duration (In Minutes)

Agenda

\* Start Date

WebinarConfiguration

☒ By default, broadcast host's video in HD ☒ Allow attendees to join from multiple devices

☒ Start video when host joins webinar ☒ Start video when panelists join webinar

Email Configuration

☒ Thank You Email Notification

☒ Share Survey Link

☒ Share Recording URL

Survey Link URL

Recording URL

**Figure 6. Create Webinar**

- The global configuration settings will be preset in the configuration section while creating the webinar. However, as an organizer, you can overwrite the configurations for a specific webinar at the time of scheduling.

| Configuration  | Checked   | Unchecked  |
|--|---|--|
| Auto Register  | This will register the invited participants automatically with the information stored on their Contact/Lead record. The participants will receive a private link to join the meeting. | The participants would receive an email with a link to register themselves (refer <i>Figure 8</i> ) followed by a private link to join the call (refer <i>Figure 10</i> ) when they complete the registration. |
| By default, broadcast host's video in HD             | The host's video will be broadcasted in HD in the webinar.  | The host's video will be broadcasted in a resolution based on the network bandwidth available.   |
| Start video when host joins webinar                  | The video broadcast will start as soon as the host joins the webinar.   | The video broadcast will have to be manually started.  |
| Start video when panelists join webinar              | The video broadcast will start as soon as the panelists joins the webinar.  | The video broadcast will have to be manually started.  |
| Allow attendees to join from multiple devices        | This will enable the attendees to join from multiple devices.   | This will NOT allow the attendees to join from multiple devices.   |
| Send the invite to all the associated Leads/Contacts | Will send the webinar invite to all the Leads/Contacts associated with the object.  | A relevant interface will allow the organizer to choose the Contact/Leads to whom the invite needs to be sent.   |

The scheduled webinars will be listed under the **Zoom Meetings** section only.

## Send Email Invite

Invites for both Zoom meeting as well as webinars can be sent to either all the participants or the participants selected with the help of a relevant interface.

The manage invites section has a check box against each of the participant name. Selecting the top checkbox would select all the participants at once. This will remain checked by default at the time of creating a meeting/webinar.

After the meeting is created, the button **Create Meeting / Create Webinar** will change to **Send Email Invite**. If you click **Send Email Invite**-not changing the checkbox's default setting, the invites will be sent to all the



associated Leads/Contacts. Leads/Contacts added after the meeting or webinar was created will also receive the invite as well.

If you uncheck this checkbox, you can select individual participants and then click **Send Email Invite** to send the invite to the selected participants only.

Manage Invites

Available/Remaining Contacts/Leads

|                                     | NAME         | EMAIL                  | CONTACT/LEAD |
|-------------------------------------|--------------|------------------------|--------------|
| <input type="checkbox"/>            | Andy Young   | a_young@dickenson.com  | Contact      |
| <input checked="" type="checkbox"/> | Lauren Boyle |                        | Contact      |
| <input type="checkbox"/>            | Josh Davis   | j.davis@expressl&t.net | Contact      |
| <input checked="" type="checkbox"/> | Arthur Song  |                        | Contact      |

Go Back **Send Email Invite**

**Figure 7. Send Email Invite**

## Attendee Registration

When the meeting is scheduled, if the organizer unchecks the *Auto-registration* checkbox, each invited participant (Campaign Member in this case) will receive the following email. The recipients of this email will have to register themselves by clicking the link in the email.

Event Invitation Inbox x

via uwh1cge9mzixeqe1.i1msz.7f-7bq27uag.ap5.bnc.salesforce.com

1:08 PM (0 minutes ago) ☆ ↶ ⋮

Hello Boyle,

You are invited to the event.  
Please check the details below.

Topic: Volunteer Briefing  
Start Date: 4-Dec-2018  
Start Time: 10:00 AM  
Duration: 90 Minutes  
Agenda: This meeting will brief the volunteers on what their responsibilities would be.

Please click on the below link to confirm your availability.  
[Click here](#)

Regards,  
DataColada

↶ Reply ↷ Forward

**Figure 8. Email: Meeting Invite-Registration**

Clicking the link would redirect the recipient to a webform that would allow them to confirm the following details:

- First Name
- Last Name
- Email address

The information will be pre-populated (from the recipient's Lead/Contact record in Salesforce).

To register themselves, the recipient will have to follow the below steps,

1. Click the link in the received email.
2. Confirm their details (that will be pre-populated on the form).
3. Click **Accept** button.

Event Invitation - Participation Details

First Name  
Lauren

Last Name  
Lauren

Email Address  
[Redacted]

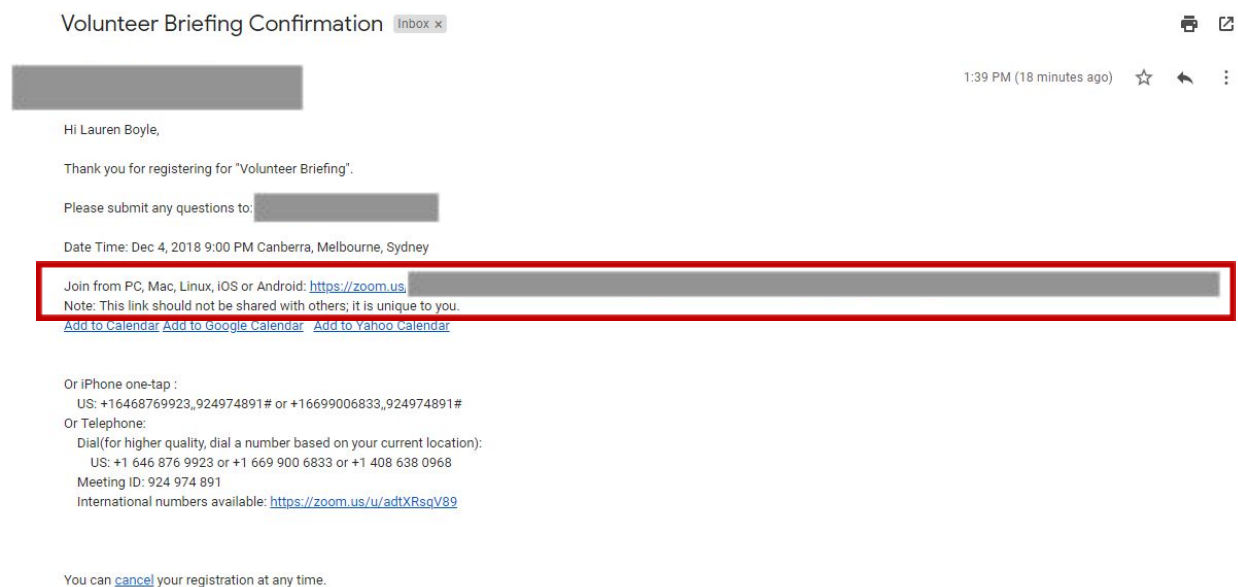
**Figure 9. Registration Web Form**

- Clicking **Accept** you will be able to see a message as in the *Figure 10*.

Thank you for registering. Please check your email inbox.

**Figure 10. Registration Confirmation**

- Close the browser tab and check your email inbox. This email is sent from Zoom and not Salesforce. To view and update the template refer to Zoom.
- You will receive another email with a private link to the meeting (like *Figure 11*). You can join the meeting by clicking the link in the email.

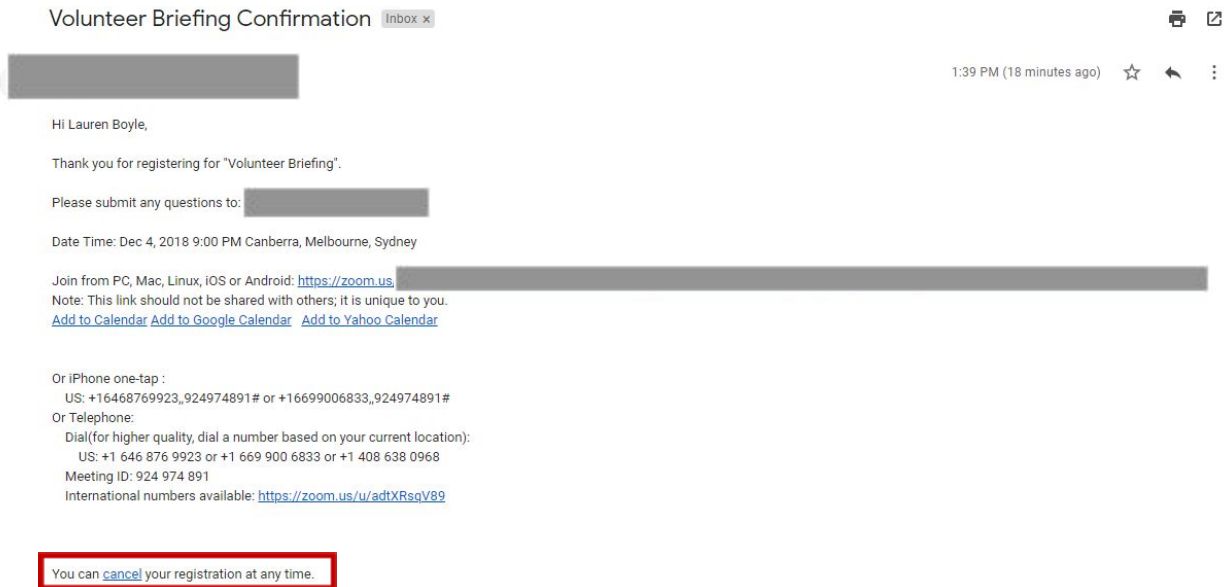


**Figure 11. Email: Registration Confirmation**

## Cancel Registration

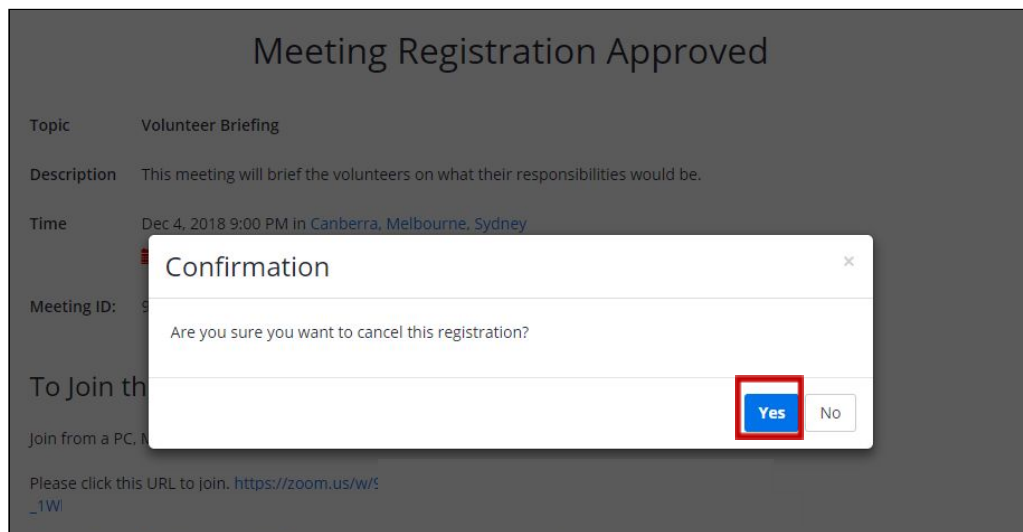
To cancel your registration,

- Click on the **Cancel** link in the Confirmation email (email received after registration).



**Figure 12. Email: Cancel Registration**

- You will be redirected to the Zoom registration cancellation confirmation page. Clicking **Yes** on the confirmation dialogue box will cancel your registration.



**Figure 13. Cancel Registration**

- The following screen will display a cancellation details.

## Meeting Registration Cancelled

**Topic** Volunteer Briefing

**Description** This meeting will brief the volunteers on what their responsibilities would be.

**Time** Dec 4, 2018 9:00 PM in [Canberra, Melbourne, Sydney](#)

**Meeting ID:** [REDACTED]

Your registration has been cancelled. Please [contact the meeting host](#) with any questions.

**Figure 14. Registration Cancellation Confirmation**

4. You will receive an email that your registration has been cancelled. This email is sent from Zoom and not Salesforce.

Volunteer Briefing - Registration Cancelled Inbox x

2:01 PM (4 hours ago)

☆ ↶ ⋮

Your registration for Volunteer Briefing at Dec 4, 2018 9:00 PM India has been cancelled.  
You will not receive any further emails about this webinar.

↶ Reply
➦ Forward

**Figure 15. Email: Registration Cancellation**

## Decline Invitation

When you receive the initial email to register yourself for the meeting, you may either Accept or Decline it. Clicking **Decline** on the registration webform would mark your status as declined in Salesforce and display the message as in the *Figure 17*.

Event Invitation - Participation Details

**First Name**  
Lauren

**Last Name**  
Lauren

**Email Address**  
[REDACTED]

Accept
Decline

**Figure 16. Decline Invitation**

You have declined the meeting invite.

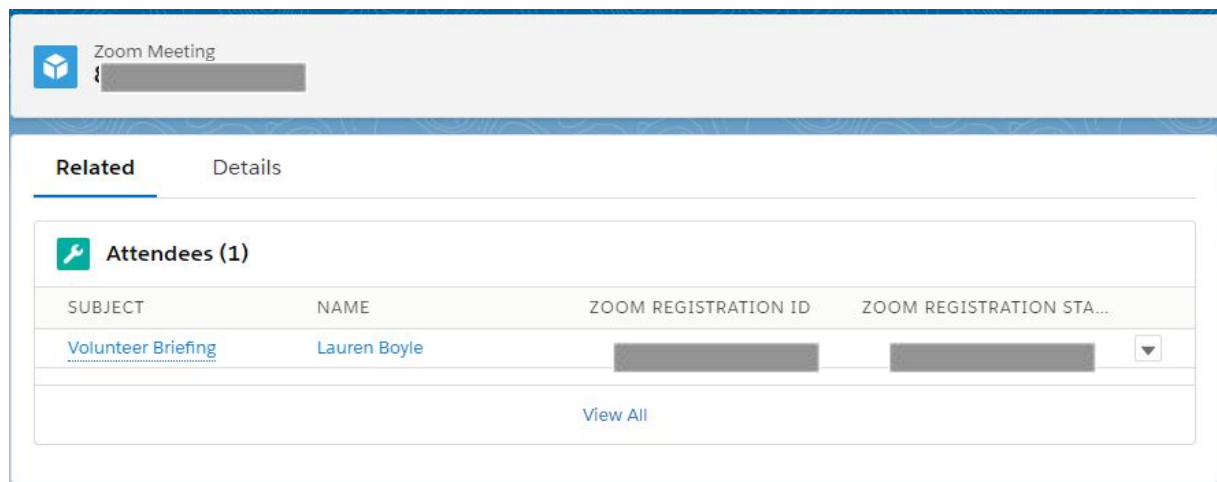
**Figure 17. Invitation Declined Confirmation**

## Tracking Meeting Attendance

Once the meeting has ended, the list of attendees who actually joined can be tracked.

A list of attendees will be visible in the related list of the record detail page of the scheduled Zoom meeting.

Link to the record detail page of the meeting is available under the Campaigns related list (refer *Figure 4*).



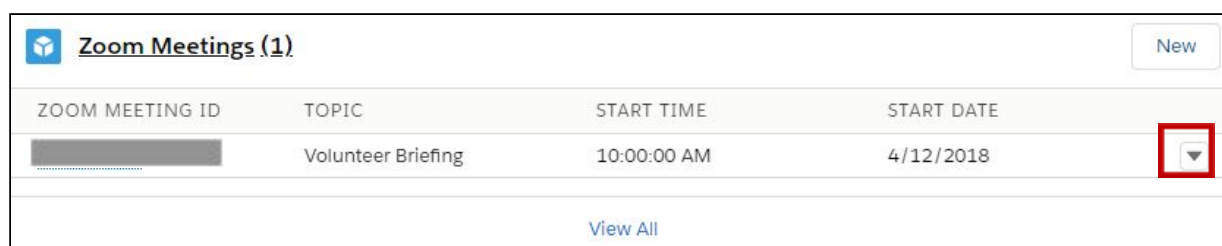
**Figure 18. Track Meeting Attendance**

## Updating an existing Meeting

To update an existing meeting, you will have to navigate to the same screen from where you created it (in this case, *Cycling Marathon* Campaign).

To update the meeting details,

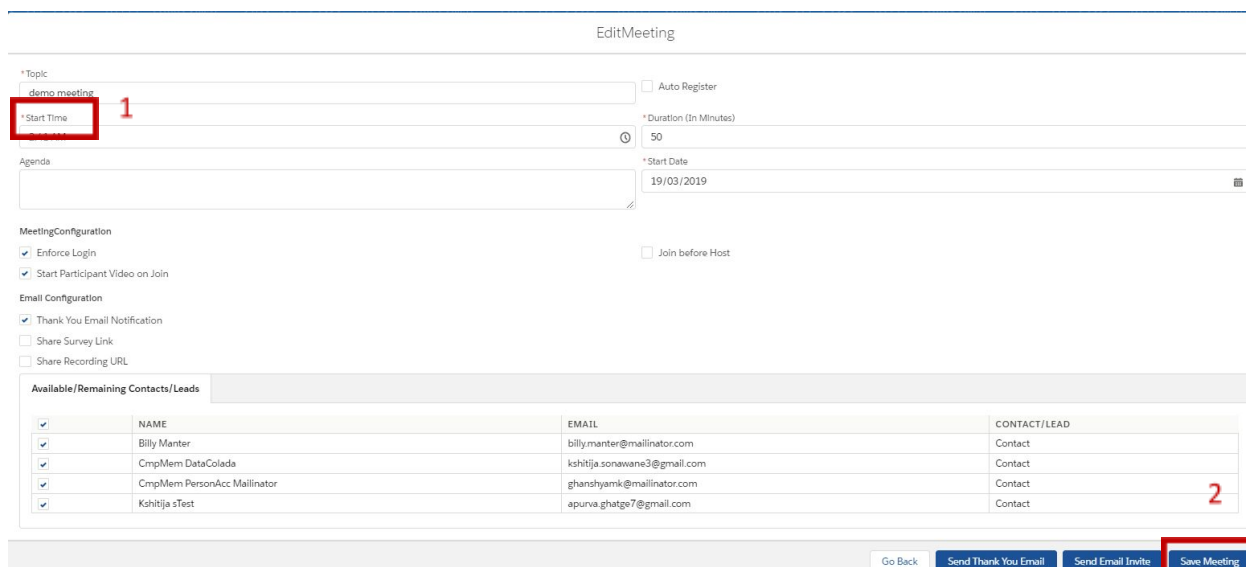
1. Click the downward arrow next to the scheduled meeting record.



2. Click **Edit** in the menu.



3. Save the relevant information. For demo the start time is updated from 10:00 AM to 11:00 AM.

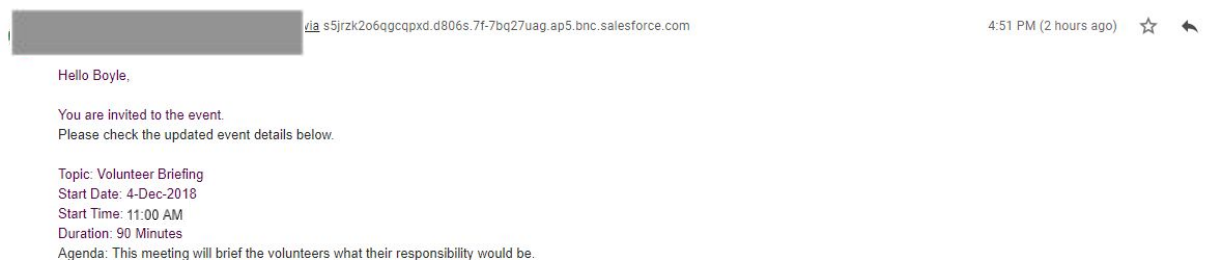


1

2

**Figure 19. Save Meeting Information**

4. Click **Save Meeting** button. This will save the changes.
5. The invited attendees will receive another email with the updated meeting information (Refer Figure 21).
6. This Template is stored in Salesforce and can be updated from Setup > Classic Email Templates.



**Figure 20. Email: Saved Meeting Information**

## Cancelling Meeting

To cancel a scheduled meeting, you will have to navigate to the zoom meeting record detail screen. You may navigate to the record detail screen from where you created it (in this case, *Cycling Marathon* Campaign).

To cancel the meeting,

1. Click **Delete** button on the meeting detail record screen.
2. The invited attendees will receive an email stating the cancellation of meeting.

# Send Thank You Email

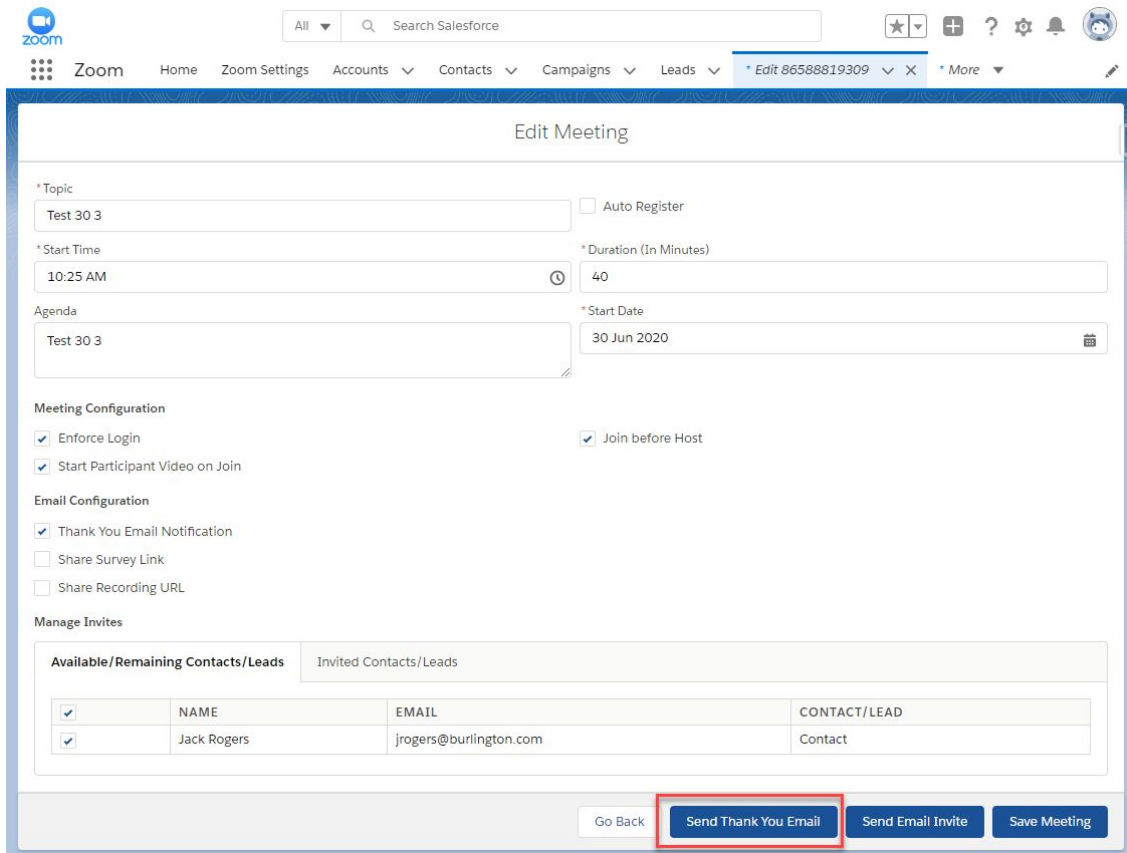
To Send Thank You Email for Participants of the meeting, you will have to navigate to the zoom meeting record detail screen. You may navigate to the record detail screen from where you created it (in this case, *Cycling Marathon Campaign*).

## Pre-requisite:

1. Thank You Email can be sent only to those participants who have attended the meeting i.e. their "Zoom Meeting Attendance" status is Attended

## To send the Thank You Email,

1. Click **Edit** button on the meeting detail record screen to edit the meeting.
2. Select the Participants to whom you want to send the Email
3. Click on Send Thank You Email button.
4. This Template is stored in Salesforce and can be updated from Setup > Classic Email Templates.



The screenshot shows the 'Edit Meeting' interface in Salesforce. The top navigation bar includes the Zoom logo and a search bar. The main content area is titled 'Edit Meeting' and contains several sections:

- Topic:** Test 30 3
- Start Time:** 10:25 AM
- Duration (In Minutes):** 40
- Agenda:** Test 30 3
- Start Date:** 30 Jun 2020
- Meeting Configuration:**
  - ☒ Enforce Login
  - ☒ Start Participant Video on Join
  - ☒ Join before Host
- Email Configuration:**
  - ☒ Thank You Email Notification
  - ☐ Share Survey Link
  - ☐ Share Recording URL
- Manage Invites:**
  - Available/Remaining Contacts/Leads:**

|                                     | NAME        | EMAIL                  | CONTACT/LEAD |
|-------------------------------------|-------------|------------------------|--------------|
| <input checked="" type="checkbox"/> | Jack Rogers | jrogers@burlington.com | Contact      |

At the bottom of the screen, there are four buttons: 'Go Back', 'Send Thank You Email' (highlighted with a red box), 'Send Email Invite', and 'Save Meeting'.

After clicking on Send Thank You Email button an email is sent to the participant's email account. The email format looks like below:



Thank you for attending the meeting/webinar ⌵ Inbox ×

**Data Colada** via yfsmg00lrb3y2dm8.ivn48dz.7f-7bq27uag.ap5.bnc.salesforce.com  
to me ▾

Dear CmpMem DataColada,

Please find the below meeting details:

Thank you for attending the meeting.

Recorded Url Link: [https://api.zoom.us/recording/play/muRDvZN3IFE7FG2un5XpBaqgbJ3Lg9Mh-3e4L7BjfbH\\_FcMs-e8t0epIDg-kLhP](https://api.zoom.us/recording/play/muRDvZN3IFE7FG2un5XpBaqgbJ3Lg9Mh-3e4L7BjfbH_FcMs-e8t0epIDg-kLhP)

Survey Link Url: <https://google.com>

Regards,  
Meeting/Webinar Organizer