

SALESFORCE TO ZOOM CONNECTOR

Setup Guide for the Salesforce Administrator

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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

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.

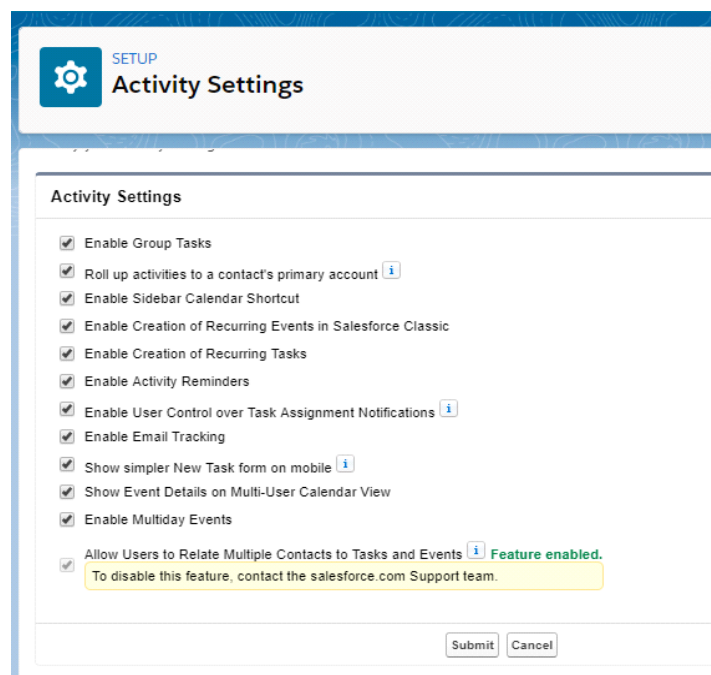


Figure 1. Allow Users to Relate Multiple Contacts to Tasks and Events

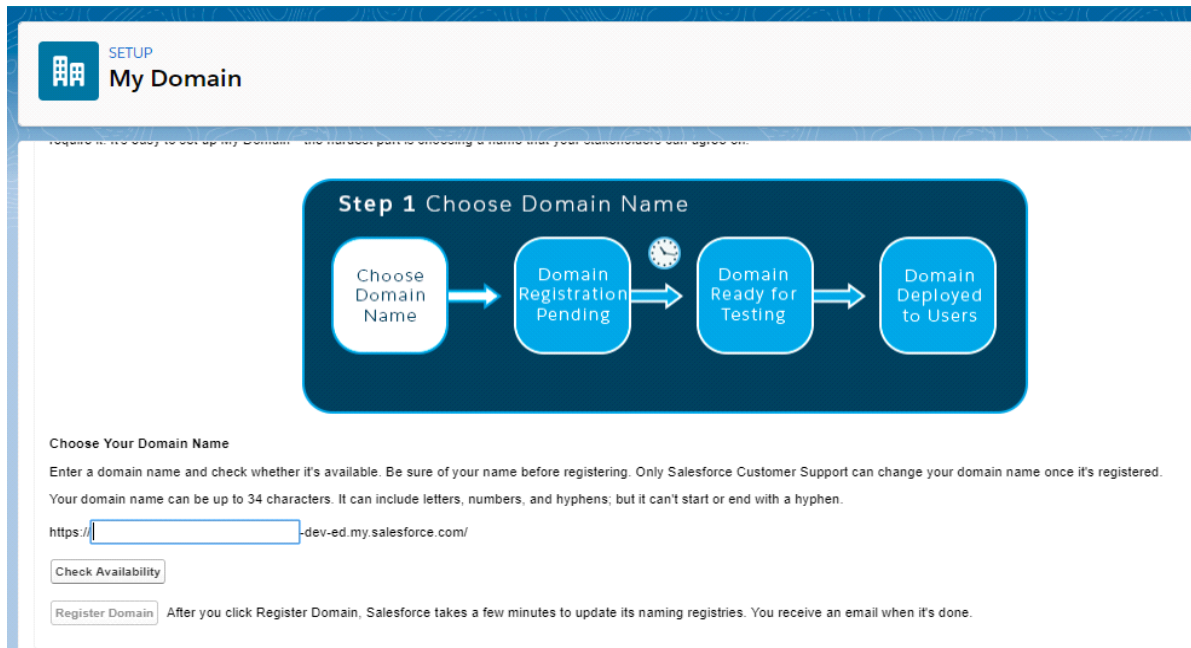
- Click **Submit**.

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.



SETUP
My Domain

Step 1 Choose Domain Name

Choose Domain Name → Domain Registration Pending → Domain Ready for Testing → Domain Deployed to Users

Choose Your Domain Name

Enter a domain name and check whether it's available. Be sure of your name before registering. Only Salesforce Customer Support can change your domain name once it's registered. Your domain name can be up to 34 characters. It can include letters, numbers, and hyphens; but it can't start or end with a hyphen.

https://[]-dev-ed.my.salesforce.com/

After you click Register Domain, Salesforce takes a few minutes to update its naming registries. You receive an email when it's done.

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.

Sites

[Help for this Page](#)

What is a Site?

Salesforce sites enables you to create public websites and applications that are directly integrated with your Salesforce.com organization—without requiring users to log in with a username and password. You can publicly expose any information stored in your organization through pages that match the look and feel of your company's brand. Use sites to create public community sites to gather customer feedback, branded login and registration pages for your portals, Web forms for capturing leads, and so on.

Because sites are hosted on Salesforce servers, there are no data integration issues. And because sites are built on native Visualforce pages, data validation on collected information is performed automatically. You can allow users to access your site through your unique Salesforce domain and URL, or you can register your own branded domain or subdomain to redirect to your site.

Create multiple sites that appeal to different audiences and satisfy your company's various business needs. For example, a software company could create one site for new developers, another for customers, and a third for marketing.

Your Force.com Domain

MyCompany.force.com

Register Your Force.com Domain

Your Sites

- MyCompany.force.com/developers
- MyCompany.force.com/customers
- MyCompany.force.com/marketing

To get started, first register your company's Salesforce site domain. Your Salesforce site domain must be unique and must consist of only alphanumeric characters. Salesforce.com recommends using your company's name or a variation of your company's name, such as 'mycompanyportal'.

You cannot modify your Salesforce site domain name after the registration process.

http:// -developer-edition.na85.force.com

☐ I have read and accepted the Salesforce [Sites Terms of Use](#)

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.

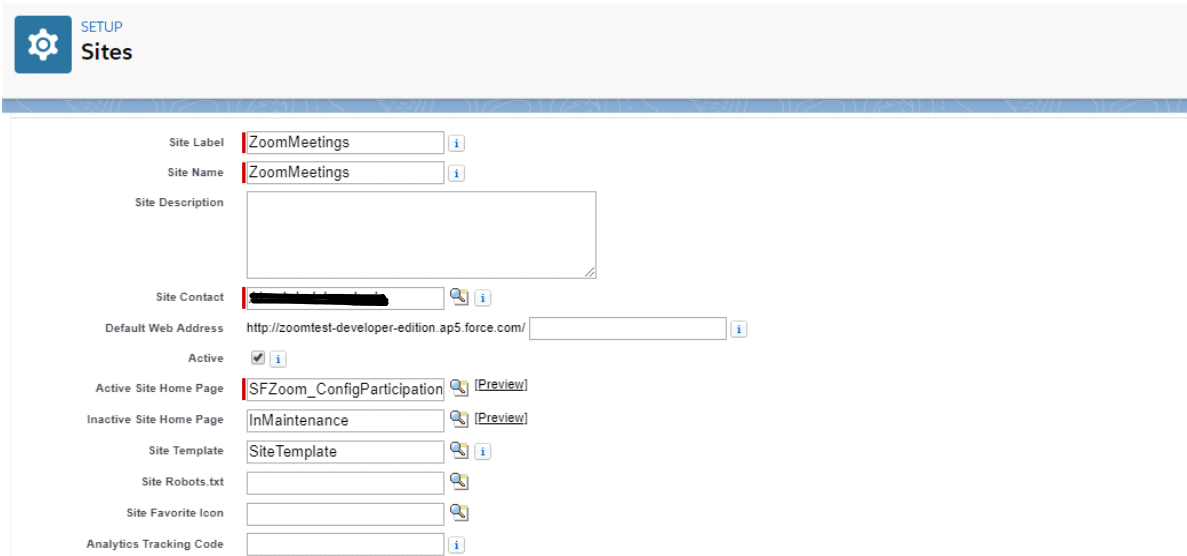
Note: It may take few minutes to register the site domain after clicking Register My Salesforce Site Domain. You cannot modify this later.

- 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.



The screenshot shows the 'SETUP Sites' page in Salesforce. The form includes the following fields:

- Site Label:** ZoomMeetings
- Site Name:** ZoomMeetings
- Site Description:** (Empty text area)
- Site Contact:** (Redacted text)
- Default Web Address:** http://zoomtest-developer-edition.ap5.force.com/
- Active:** ☒
- Active Site Home Page:** SFZoom_ConfigParticipation (with a preview link)
- Inactive Site Home Page:** InMaintenance (with a preview link)
- Site Template:** SiteTemplate
- Site Robots.txt:** (Empty text area)
- Site Favorite Icon:** (Empty text area)
- Analytics Tracking Code:** (Empty text area)


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*.


SETUP
Sites

Create multiple sites that appeal to different audiences and satisfy your company's various business needs. For example, a software company could create one site for new developers, another for customers, and a third for marketing.

Your Force.com Domain
 MyCompany.force.com

Your Sites

MyCompany.force.com/developers

MyCompany.force.com/customers

MyCompany.force.com/marketing

[Create Your Force.com Sites](#)

Your Salesforce site domain name is zoomtest-developer-edition.ap5.force.com

[Salesforce Sites Terms and Conditions](#)

Sites (zoomtest-developer-edition.ap5.force.com)
New

Action	Site Label ↑	Site URL	Site Description	Active	Site Type	Last Modified By
Edit Deactivate	ZoomMeetings	http://zoomtest-developer-edition.ap5.force.com/		✓	Force.com	Akash Lalchandani, 1/13/2019 2:11 AM

Figure 5. Site List

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

[« Back to List: Sites](#)

Site Detail

Edit
Public Access Settings
Login Settings
URL Redirects
Deactivate

Site Label ZoomMeetings
 Site Name ZoomMeetings

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

Profile
ZoomMeetings Profile
Help for this Page ?

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \(0\)](#) |
 [Enabled Apex Class Access \(0\)](#) |
 [Enabled Visualforce Page Access \(13\)](#) |
 [Enabled External Data Source Access \(0\)](#) |
 [Enabled Named Credential Access \(0\)](#) |
 [Enabled Custom Permissions \(0\)](#)

Profile Detail
Edit
View Users

Name	User License	Custom Profile
ZoomMeetings Profile	Guest	✓

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

ZoomMeetings Profile
Help for this Page ?

On this page you can create, view, and manage users.

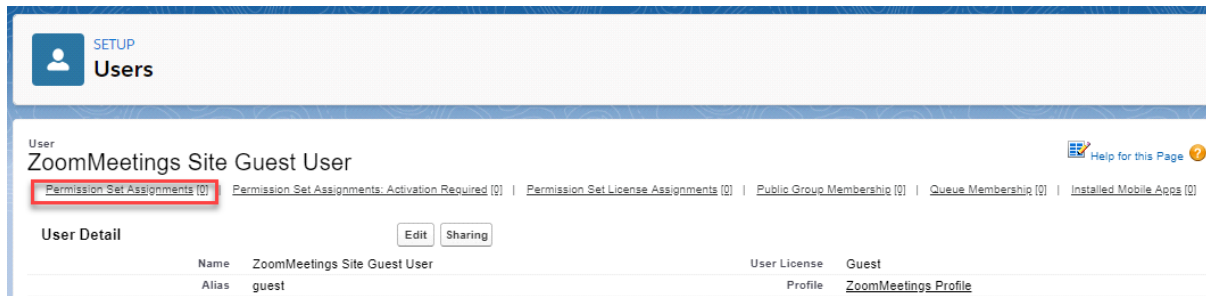
In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

Action	Full Name ↑	Alias	Username	Last Login	Role	Active	Profile	Manager
Edit	Site Guest User, ZoomMeetings	guest	zoommeetings@zoomtest-developer-edition.ap5.force.com			✓	ZoomMeetings Profile	

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

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



SETUP Users

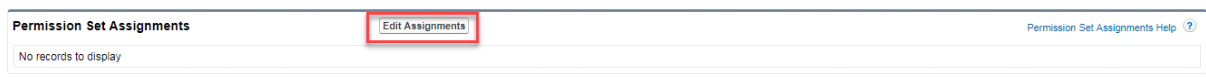
User: ZoomMeetings Site Guest User

Permission Set Assignments (0) | Permission Set Assignments: Activation Required (0) | Permission Set License Assignments (0) | Public Group Membership (0) | Queue Membership (0) | Installed Mobile Apps (0)

User Detail Edit Sharing

Name	ZoomMeetings Site Guest User	User License	Guest
Alias	guest	Profile	ZoomMeetings Profile

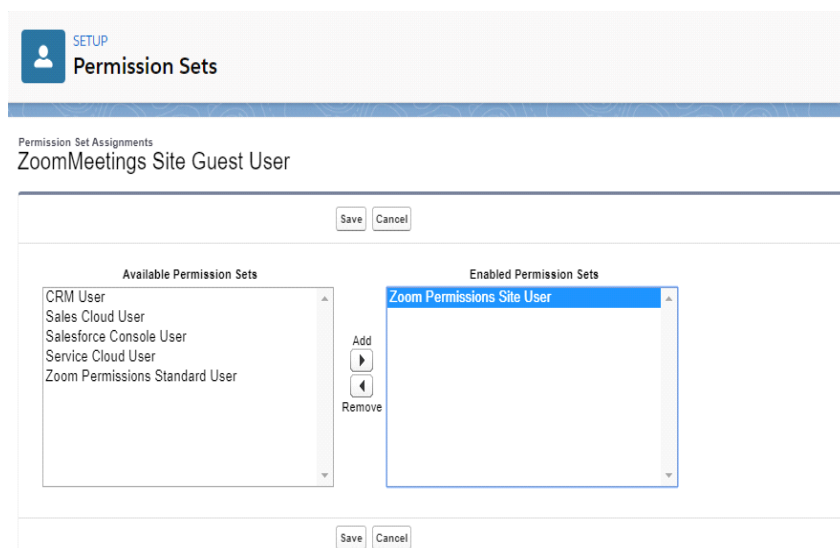
- Click **Edit Assignments**.



Permission Set Assignments Edit Assignments Permission Set Assignments Help

No records to display

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



SETUP Permission Sets

Permission Set Assignments: ZoomMeetings Site Guest User

Save Cancel

Available Permission Sets

- CRM User
- Sales Cloud User
- Salesforce Console User
- Service Cloud User
- Zoom Permissions Standard User

Add

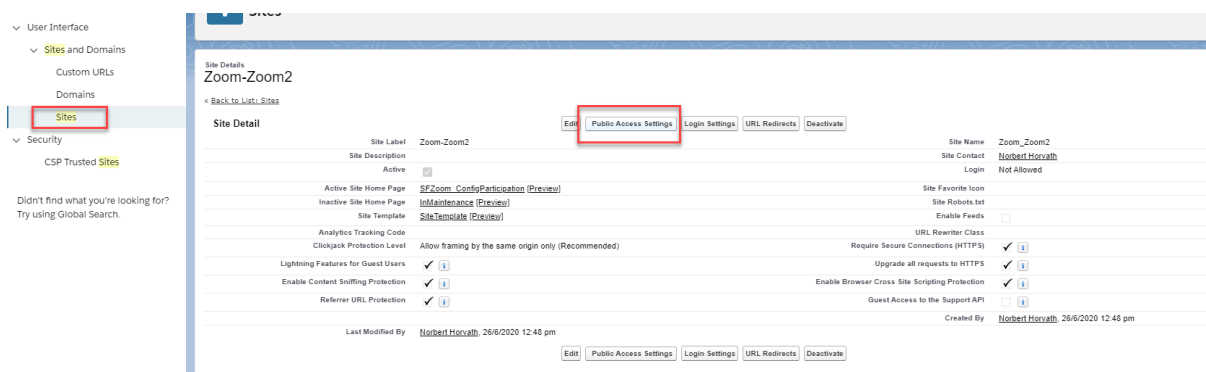
Remove

Enabled Permission Sets

- Zoom Permissions Site User

Save Cancel

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



SETUP Sites

Site Details: Zoom-Zoom2

Back to List Sites Edit Public Access Settings Login Settings URL Redirects Deactivate

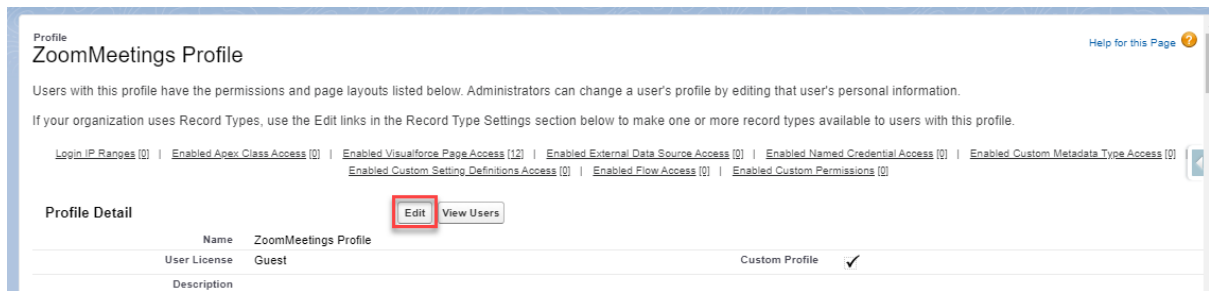
Site Label	Zoom-Zoom2	Site Name	Zoom_Zoom2
Site Description	Active	Site Contact	Norbert Horvath
Active Site Home Page	SFZoom_ConfigParticipation (Preview)	Login	Not Allowed
Inactive Site Home Page	InMaintenance (Preview)	Site Favorite Icon	
Site Template	SiteTemplate (Preview)	Site Robots.txt	
Analytics Tracking Code	Allow framing by the same origin only (Recommended)	Enable Feeds	<input type="checkbox"/>
Clickjack Protection Level		URL Rewriter Class	
Lightning Features for Guest Users	<input checked="" type="checkbox"/>	Require Secure Connections (HTTPS)	<input checked="" type="checkbox"/>
Enable Content Sniffing Protection	<input checked="" type="checkbox"/>	Upgrade all requests to HTTPS	<input checked="" type="checkbox"/>
Referrer URL Protection	<input checked="" type="checkbox"/>	Enable Browser Cross Site Scripting Protection	<input checked="" type="checkbox"/>
		Guest Access to the Support API	<input type="checkbox"/>

Created By: Norbert Horvath, 26/6/2020 12:48 pm

Last Modified By: Norbert Horvath, 26/6/2020 12:48 pm

Edit Public Access Settings Login Settings URL Redirects Deactivate

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



Profile
ZoomMeetings Profile

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

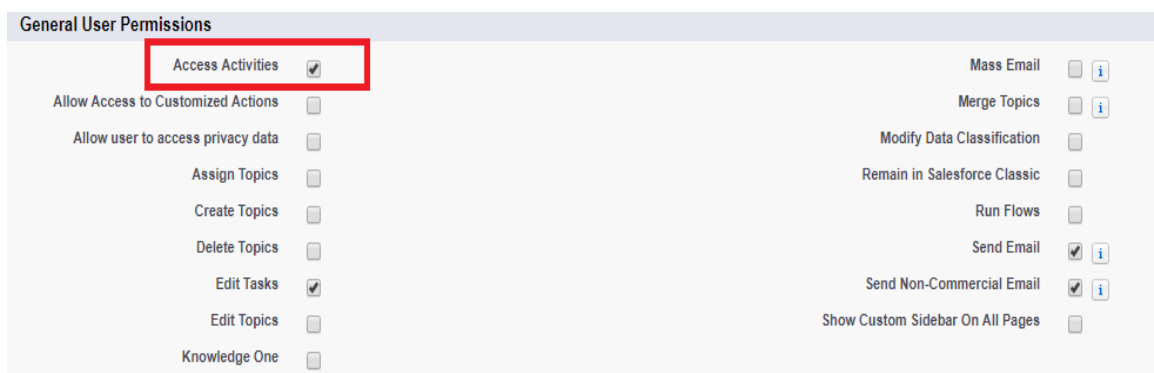
Login IP Ranges (0) | Enabled Apex Class Access (0) | Enabled Visualforce Page Access (12) | Enabled External Data Source Access (0) | Enabled Named Credential Access (0) | Enabled Custom Metadata Type Access (0) | Enabled Custom Setting Definitions Access (0) | Enabled Flow Access (0) | Enabled Custom Permissions (0)

Profile Detail

Edit View Users

Name	ZoomMeetings Profile
User License	Guest
Description	Custom Profile <input checked="" type="checkbox"/>

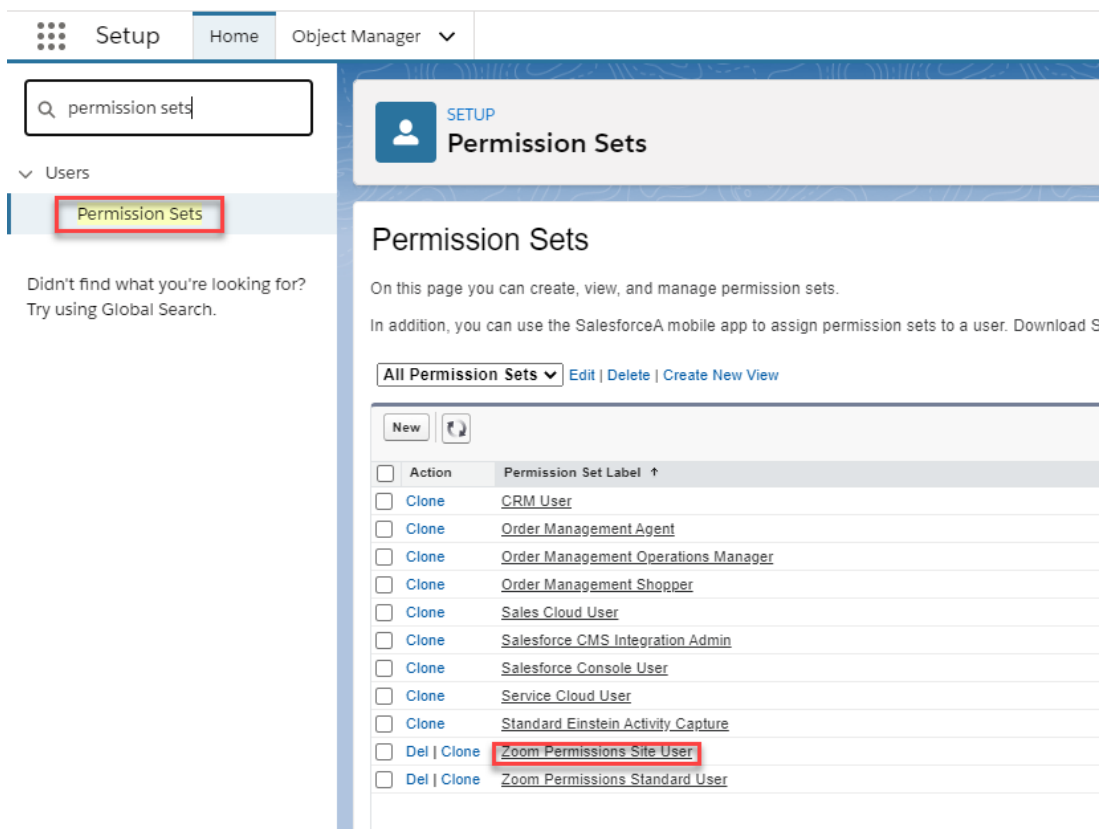
Scroll down to **General User Permissions** and check the following permissions:



General User Permissions

<input checked="" type="checkbox"/> Access Activities <input type="checkbox"/> Allow Access to Customized Actions <input type="checkbox"/> Allow user to access privacy data <input type="checkbox"/> Assign Topics <input type="checkbox"/> Create Topics <input type="checkbox"/> Delete Topics <input checked="" type="checkbox"/> Edit Tasks <input type="checkbox"/> Edit Topics <input type="checkbox"/> Knowledge One	<input type="checkbox"/> Mass Email <input type="checkbox"/> Merge Topics <input type="checkbox"/> Modify Data Classification <input type="checkbox"/> Remain in Salesforce Classic <input type="checkbox"/> Run Flows <input checked="" type="checkbox"/> Send Email <input checked="" type="checkbox"/> Send Non-Commercial Email <input type="checkbox"/> Show Custom Sidebar On All Pages
--	--

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



Setup Home Object Manager

Q permission sets

Users

Permission Sets

Didn't find what you're looking for? Try using Global Search.

On this page you can create, view, and manage permission sets. In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download S

All Permission Sets Edit Delete Create New View

Action	Permission Set Label
<input type="checkbox"/> Clone	CRM User
<input type="checkbox"/> Clone	Order Management Agent
<input type="checkbox"/> Clone	Order Management Operations Manager
<input type="checkbox"/> Clone	Order Management Shopper
<input type="checkbox"/> Clone	Sales Cloud User
<input type="checkbox"/> Clone	Salesforce CMS Integration Admin
<input type="checkbox"/> Clone	Salesforce Console User
<input type="checkbox"/> Clone	Service Cloud User
<input type="checkbox"/> Clone	Standard Einstein Activity Capture
<input type="checkbox"/> Del Clone	Zoom Permissions Site User
<input type="checkbox"/> Del Clone	Zoom Permissions Standard User

Select **Object Settings**.

Permission Set
Zoom Permissions Site User

Find Settings... Clone Edit Properties Manage Assignments

Permission Set Overview

Description	API Name	Zoom_Permissions_Site_User
License	Namespace Prefix	
Session Activation Required <input type="checkbox"/>	Created By	1/7/2020, 6:39 pm
Last Modified By		1/7/2020, 6:45 pm

Apps

- Assigned Apps**
Settings that specify which apps are visible in the app menu
- Assigned Connected Apps**
Settings that specify which connected apps are visible in the app menu
- Object Settings**
Permissions to access objects and fields, and settings such as tab availability
- App Permissions**
Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access**
Permissions to execute Apex classes
- Visualforce Page Access**
Permissions to execute Visualforce pages

Settings that apply to Salesforce apps, such as Sales, and

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

Contact Point Type Consent	No Access	11	--
Contact Requests	No Access	13	--
Contacts	No Access	31	--
Content	--	--	--

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

Permission Set Overview > Object Settings **Contacts**

Contacts **Save** **Cancel**

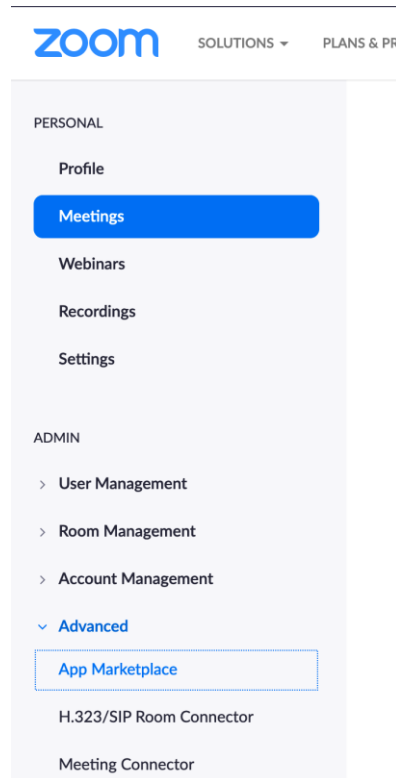
Object Permissions

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input type="checkbox"/>
Edit	<input type="checkbox"/>
Delete	<input type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input type="checkbox"/>

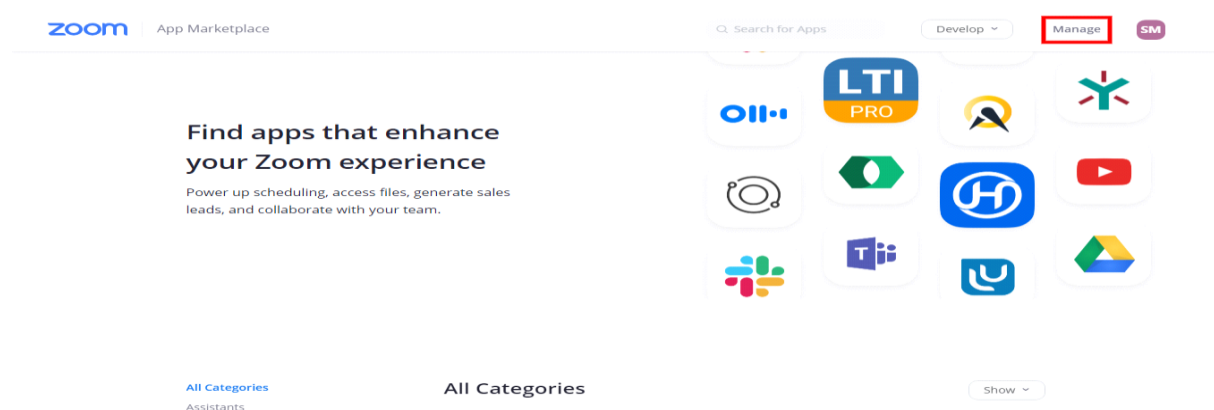
API and Meeting Settings

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

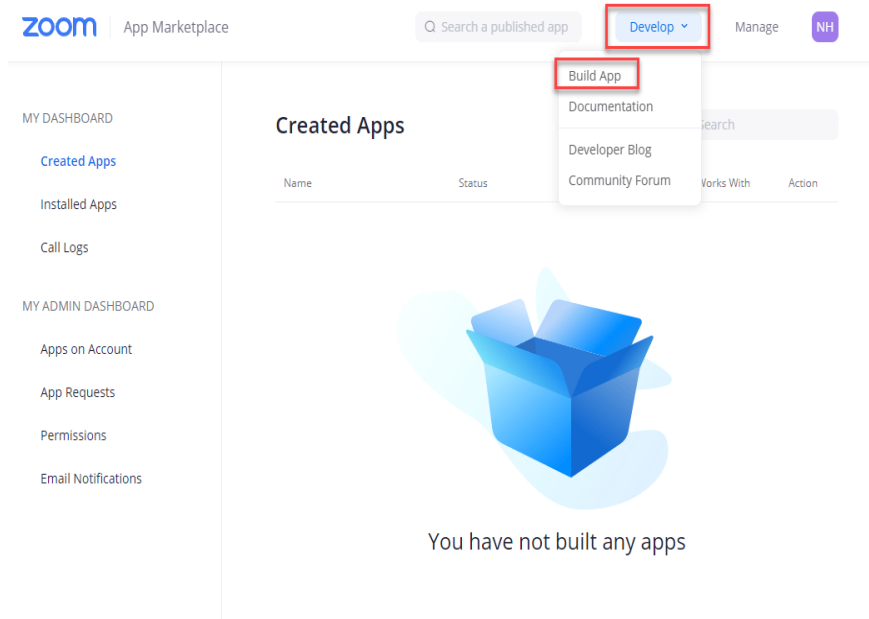
- Login to the <https://zoom.us/> with your developer credentials.
- Go to Admin → Advanced → App Marketplace menu item from menu navigation (see screenshot)



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

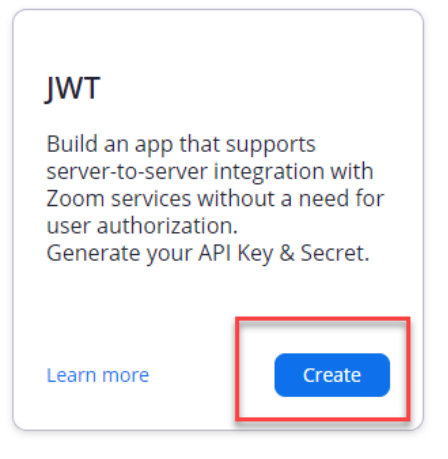


- To now redirect to the Developer page, please click on developer.zoom.us
- If there is no current JWS App, build one by going to Develop > Build App.



- Create a JWT App and Name the App.

Choose your app type



- Fill in the required information.

Basic Information

App Name 10/50 Short Description

Zoom- Zoom Short description

Company Name

Your Company Name

This field cannot be empty

Developer Contact Information

Provide your email for us to contact you for service impacting announcements, including new Marketplace/API updates, breaking changes, and other updates as well as information that directly impact your app.

Name

Your Name

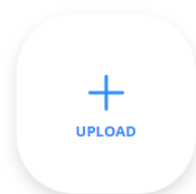
This field cannot be empty

Email Address

yourname@companyname.com

This field cannot be empty

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



Information

App Credentials

Feature

Activation

developer.zoom.us API

Intent to publish: No Account-level app JWT Credentials

App Credentials

API Key

DjanYrTGRjmrFyLATz2ZiW

Copy

API Secret

Copy

Regenerate

IM Chat History Token

eyJhbGciOiJIUzI1NiIsInR5cCI6Ikpz3MIOjVWUfocWRnaFN5NiIV...Copy

Regenerate

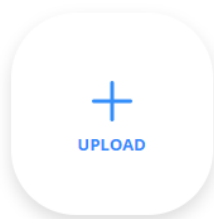
[View JWT Token](#)

[< Back](#)

✓ Saved

[Continue](#)

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



developer.zoom.us API

Intent to publish: No Account-level app JWT Credentials

Add Feature

- ✓ Information
- ✓ App Credentials
- Feature
- ✓ Activation

Event Subscriptions



This feature allows you to subscribe to interested events and receive Webhook notifications.

+ Add new event subscription

< Back

Continue

- Information
- ✓ App Credentials
- Feature
- ✓ Activation

Verification Token

Use this verification token to validate an event notification request from zoom.us for this app

[Redacted Token] [Copy](#) [Regenerate](#)

Event Subscriptions



This feature allows you to subscribe to interested events and receive Webhook notifications.

+ Add new event subscription

Zoom



Subscription Name

Name this particular event subscription

Zoom

Event notifications can be subscribed for all users in the account.

Event notification endpoint URL

Destination URL for this app to receive subscribed event notifications

[Redacted URL]/services/apexrest/Update

Event types

Click on the button below to select interested event types.

8 events added

Save

Cancel

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

Settings

These settings affect all Salesforce sites.

☐ Assign new records created by Salesforce Sites guest users to a default owner in the org.

☐ Allow using standard external profiles for self-registration and user creation.

[Save](#) [Cancel](#)

Sites (zoom-zoom-developer-edition.ap17.force.com) [New](#)

Action	Site Label ↑	Site URL	Site Description	Active	Site Type	Last Modified By
Edit Deactivate	ZoomMeetings	http://zoom-zoom-developer-edition.ap17.force.com/		✓	Force.com	Norbert Horvath, 4/6/2020, 7:41 am

- 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.

Event types

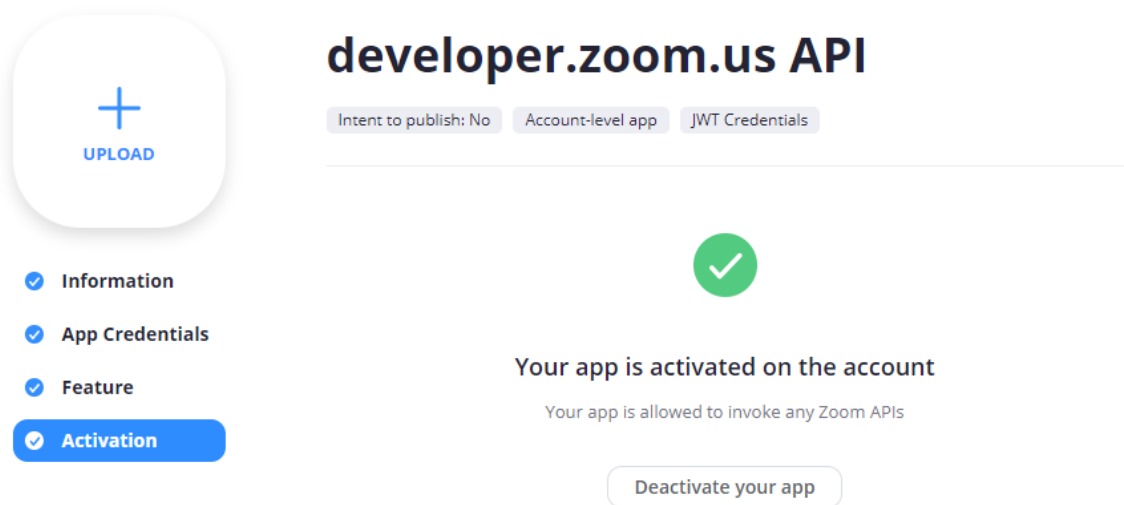
8 Added

- Meeting
 - Webinar**
 - Recording
 - Zoom Rooms
 - User
 - User Activity
 - Account
 - Zoom Phone
- ☐ Participant/Host left webinar
 - ☐ Webinar has been created
 - ☐ Webinar has been updated
 - ☐ Webinar has been deleted
 - ☐ Webinar Registration has been created
 - ☒ Webinar Registration has been canceled
 - ☒ Webinar Registration has been approved
 - ☒ Webinar Registration has been denied
 - ☐ Webinar issues alert

↓ Scroll for more

[Done](#)

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

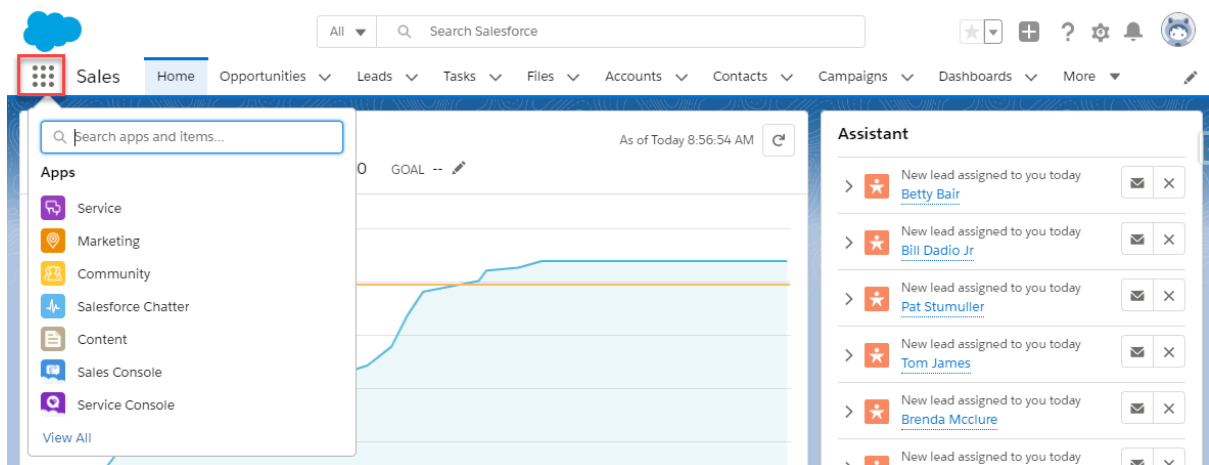


Select the **App Credentials** tab in Zoom to bring up the API Key and API Secret, while returning to Salesforce.

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.

Custom App Settings							
	Visible	Default		Visible	Default		
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>		
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>	<input type="radio"/>		
Bolt Solutions (standard__LightningBolt)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce CMS (standard__SalesforceCMS)	<input type="checkbox"/>	<input type="radio"/>		
Community (standard__Community)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sample Console (standard__ServiceConsole)	<input type="checkbox"/>	<input type="radio"/>		
Content (standard__Content)	<input checked="" type="checkbox"/>	<input type="radio"/>	Service (standard__Service)	<input checked="" type="checkbox"/>	<input type="radio"/>		
Lightning Scheduler Setup (standard__LightningScheduler)	<input checked="" type="checkbox"/>	<input type="radio"/>	Service Console (standard__LightningService)	<input checked="" type="checkbox"/>	<input type="radio"/>		
Lightning Usage App (standard__LightningInstrumentation)	<input checked="" type="checkbox"/>	<input type="radio"/>	Site.com (standard__Sites)	<input checked="" type="checkbox"/>	<input type="radio"/>		
Marketing (standard__Marketing)	<input checked="" type="checkbox"/>	<input type="radio"/>	Work.com (standard__Work)	<input checked="" type="checkbox"/>	<input type="radio"/>		
Sales (standard__LightningSales)	<input checked="" type="checkbox"/>	<input type="radio"/>	Zoom (Zoom_Lightning)	<input checked="" type="checkbox"/>	<input type="radio"/>		
Sales (standard__Sales)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>	Zoom (Zoom)	<input checked="" type="checkbox"/>	<input type="radio"/>		

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

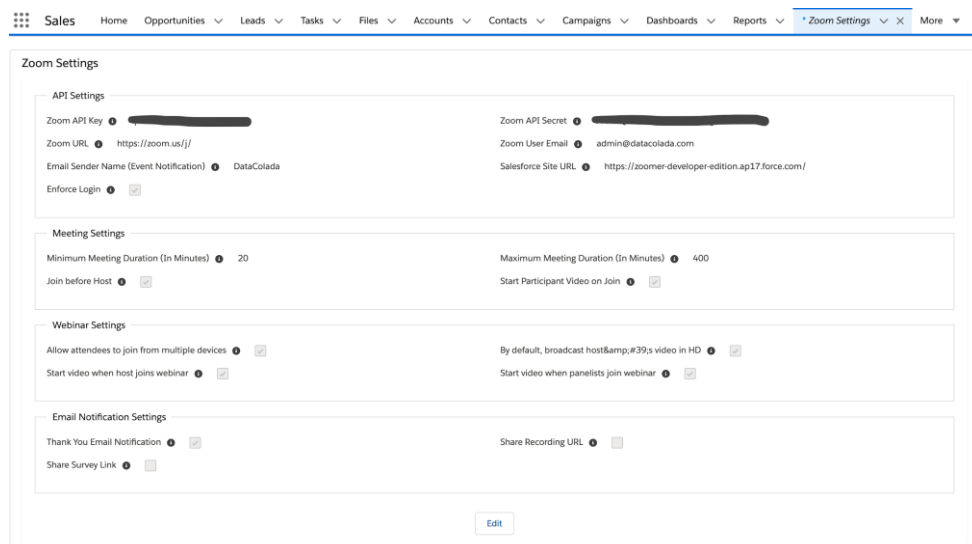


Figure 8. Zoom Settings Page

- 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:

Personal Meeting ID: *** **738 [Show](#)
https://zoom.us/j/*****7
 ✕ Use this ID for instant n

- **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

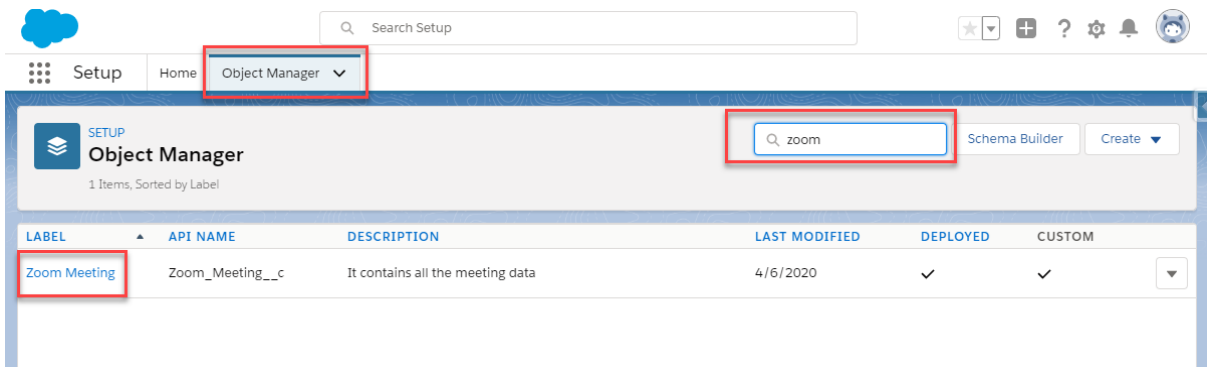
To add a Zoom meetings section for creating meetings from an object record screen, relevant object level configurations are required. These configurations involve creating a custom lookup field on the zoom meetings object and adding some metadata.

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:

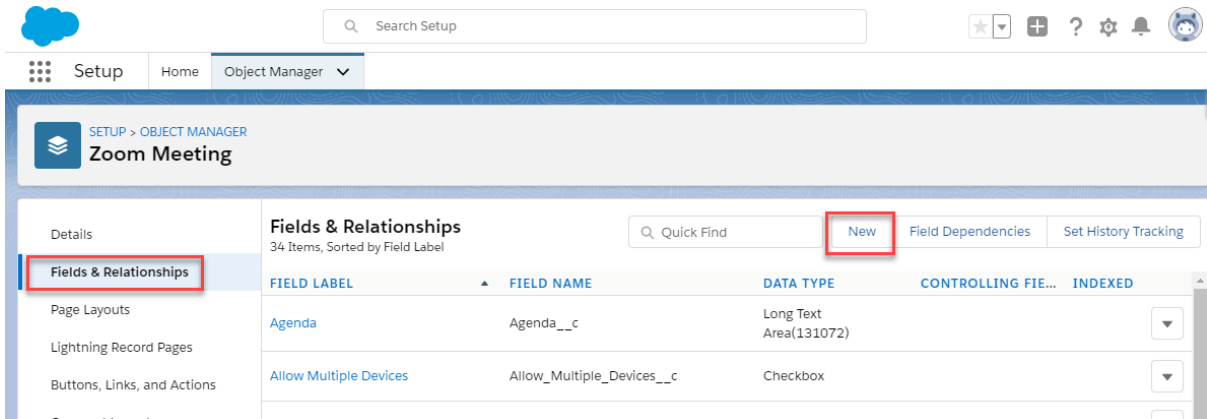
- Go to **Setup** and under Object Manager, choose *Zoom Meeting*.



The screenshot shows the Salesforce Setup interface. The 'Object Manager' dropdown is selected in the top navigation bar. In the 'Object Manager' section, a search bar contains 'zoom', and the 'Zoom Meeting' object is listed in the table below. The table has columns: LABEL, API NAME, DESCRIPTION, LAST MODIFIED, DEPLOYED, and CUSTOM. The 'Zoom Meeting' row is highlighted.

LABEL	API NAME	DESCRIPTION	LAST MODIFIED	DEPLOYED	CUSTOM
Zoom Meeting	Zoom_Meeting__c	It contains all the meeting data	4/6/2020	✓	✓

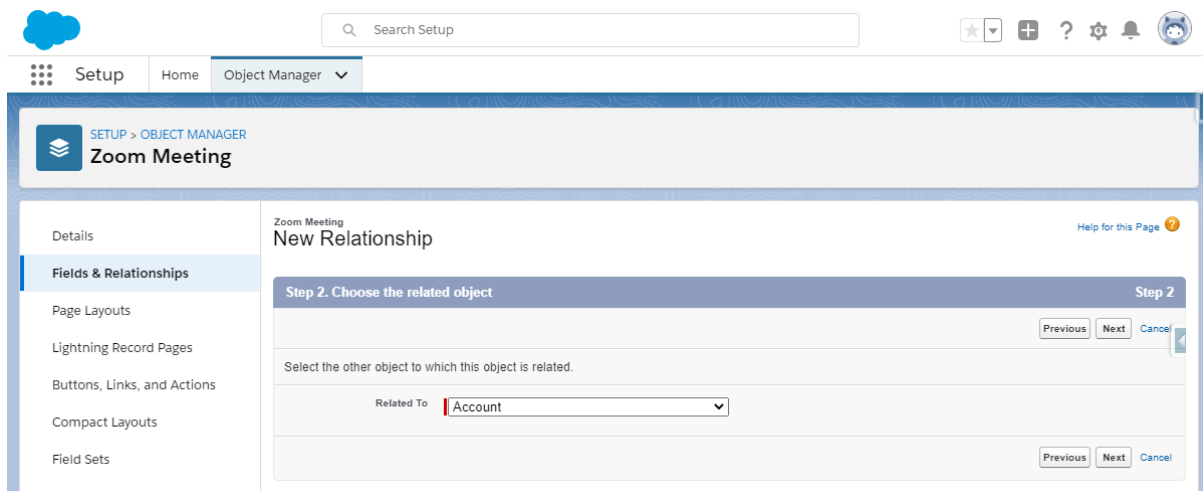
- Go to **Fields & Relationships** and click **New**.



The screenshot shows the 'Fields & Relationships' section for the 'Zoom Meeting' object. The 'Fields & Relationships' tab is selected in the left sidebar. The 'New' button is highlighted in the top right corner. The table below lists the fields for the Zoom Meeting object.

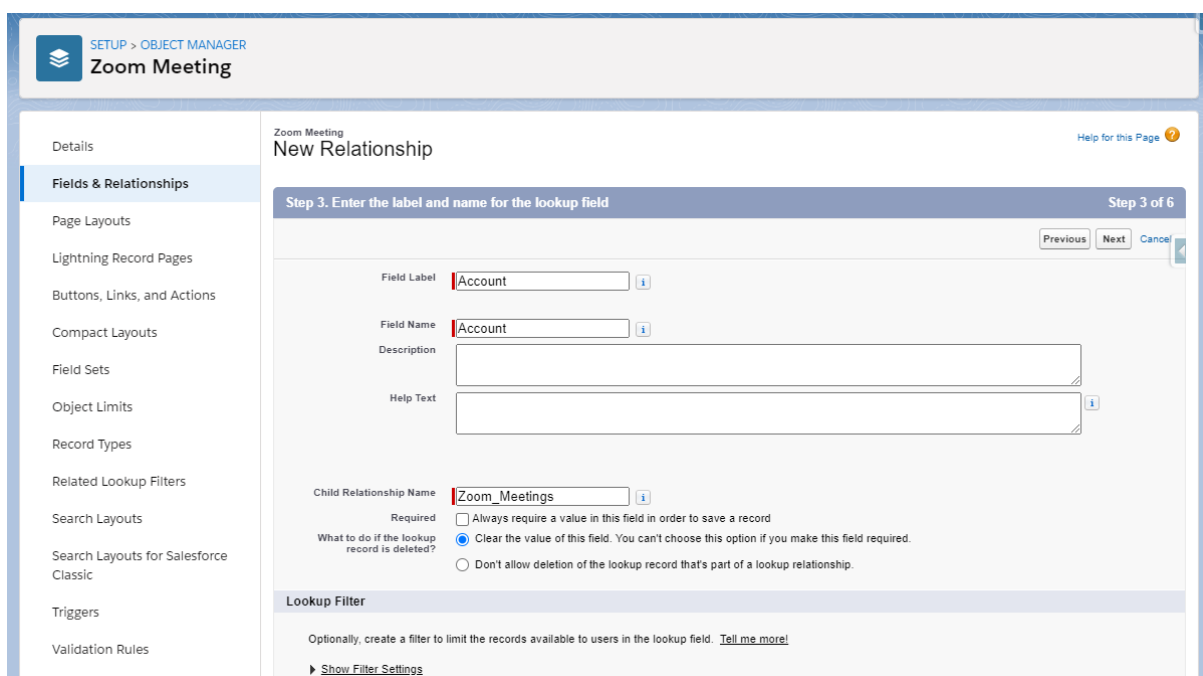
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIE...	INDEXED
Agenda	Agenda__c	Long Text Area(131072)		
Allow Multiple Devices	Allow_Multiple_Devices__c	Checkbox		

- 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**.



The screenshot shows the Salesforce Setup interface for creating a new relationship for the Zoom Meeting object. The left sidebar contains navigation links: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, and Object Limits. The main content area is titled 'Zoom Meeting New Relationship' and shows 'Step 2. Choose the related object'. A dropdown menu for 'Related To' is set to 'Account'. Navigation buttons 'Previous', 'Next', and 'Cancel' are visible.

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



The screenshot shows the next step in the Salesforce Setup interface, 'Step 3. Enter the label and name for the lookup field'. The left sidebar is the same as in the previous screenshot. The main content area is titled 'Zoom Meeting New Relationship' and shows 'Step 3 of 6'. Fields include 'Field Label' (set to 'Account'), 'Field Name' (set to 'Account'), 'Description', 'Help Text', 'Child Relationship Name' (set to 'Zoom_Meetings'), and a 'Required' section with radio buttons for 'Always require a value in this field in order to save a record' (selected), 'Clear the value of this field. You can't choose this option if you make this field required.', and 'Don't allow deletion of the lookup record that's part of a lookup relationship.'. A 'Lookup Filter' section at the bottom includes a link 'Tell me more!' and a 'Show Filter Settings' button.

- 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.

Step 6. Add custom related lists

Step 6 of 6

Previous Save & New Save Cancel

Field Label Account

Data Type Lookup

Field Name Account

Description

Specify the title that the related list will have in all of the layouts associated with the parent.

Related List Label Zoom Meetings

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout. To change the values that appear, you will need to customize the Record Types.

☒ Add Related List

	Page Layout Name
<input checked="" type="checkbox"/>	Account (Marketing) Layout
<input checked="" type="checkbox"/>	Account (Sales) Layout
<input checked="" type="checkbox"/>	Account (Support) Layout
<input checked="" type="checkbox"/>	Account Layout

☒ Append related list to users' existing personal customizations

Previous Save & New Save Cancel

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

zoom

All Search Salesforce

Zoom

Home

Zoom Settings

Accounts

Contacts

Campaigns

Leads

Account Burlington Textiles Corp of America

+ Follow New Contact New Case New Note

Type Customer - Direct

Phone (336) 222-7000

Website www.burlington.com

Account Owner Norbert Horvath

Account Site

Industry Apparel

Related Details News

We found no potential duplicates of this account.

Zoom Meetings (0)

New

Contacts (1)

New

Jack Rogers

Title: VP, Facilities

Email: jrogers@burlington.com

Phone: (336) 222-7000

View All

Opportunities (1)

New

Burlington Textiles Weaving Plant Generator

Stage: Closed Won

Amount: \$235,000.00

Close Date: 5/4/2020

Activity Chatter

New Task Log a Call New Event

Create a task... Add

Filters: All time · All activities · All types

Refresh Expand All View All

Upcoming & Overdue

No next steps.

To get things moving, add a task or set up a meeting.

No past activity. Past meetings and tasks marked as done show up here.

Figure 9. Create Lookup Step-Related List Label.

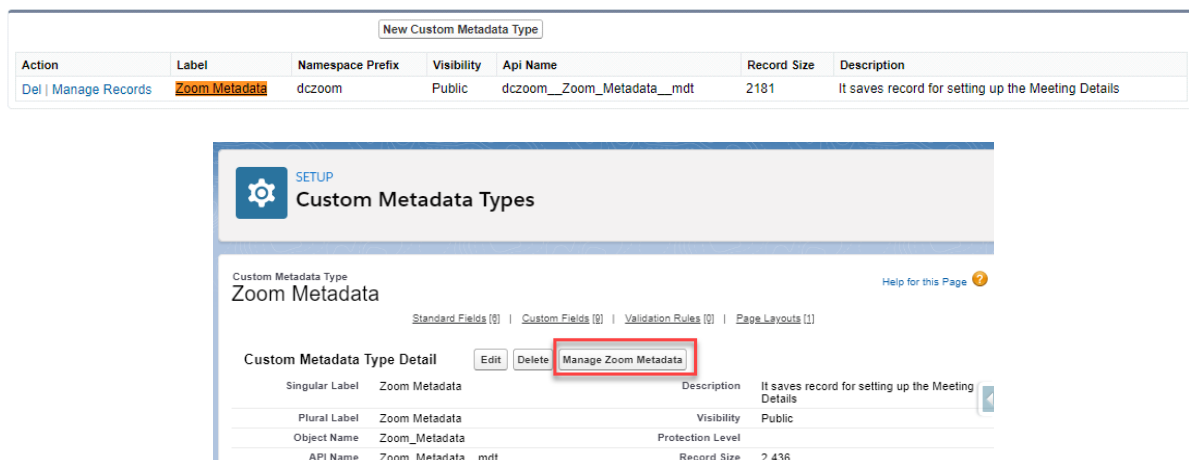
Create Zoom custom metadata record

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**.




The screenshot shows the 'Custom Metadata Types' page in Salesforce. At the top, there's a 'New Custom Metadata Type' button. Below it is a table with columns: Action, Label, Namespace Prefix, Visibility, Api Name, Record Size, and Description. The table contains one entry for 'Zoom Metadata' with a 'Manage Records' link. Below the table, there's a section for 'Custom Metadata Type Detail' for 'Zoom Metadata'. It includes fields for Singular Label, Plural Label, Object Name, API Name, Description, Visibility, Protection Level, and Record Size. The 'Manage Zoom Metadata' button is highlighted with a red box.

Figure 10. Create Metadata (1/2)

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

Zoom Metadata



The screenshot shows the 'Zoom Metadata Edit' form in Salesforce. It has a 'Save', 'Save & New', and 'Cancel' button at the top. The form is divided into two main sections: 'Information' and 'Protected Component'. The 'Information' section contains fields for Label, Zoom Metadata Name, Lookup Field API Name, Child Object API Name, Contact Lookup Field, Email Field API Name of Contact, and Attendance Status Field API Name. The 'Protected Component' section contains fields for Namespace Prefix, Parent Object Name, Child Relationship Name, Lead Lookup Field, and Email Field API Name of Lead. The 'Save', 'Save & New', and 'Cancel' buttons are at the bottom.

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 Statuses related list on the Campaign Layout. Add the new status values (Not Attended, Attended, Cancelled) for cascading zoom attendance status at campaign member.

Related

Details

 Campaign Member Statuses (5)

New

Change Default Status

Member Status	Is Default	Responded	Last Modified Date
Attended	<input type="checkbox"/>	<input type="checkbox"/>	20/5/2020, 10:41 PM
Cancelled	<input type="checkbox"/>	<input type="checkbox"/>	20/5/2020, 10:42 PM
Not Attended	<input type="checkbox"/>	<input type="checkbox"/>	20/5/2020, 10:41 PM
Responded	<input type="checkbox"/>	<input checked="" type="checkbox"/>	20/5/2020, 10:41 PM
Sent	<input checked="" type="checkbox"/>	<input type="checkbox"/>	20/5/2020, 10:41 PM

Figure 12. Campaign Member Statuses

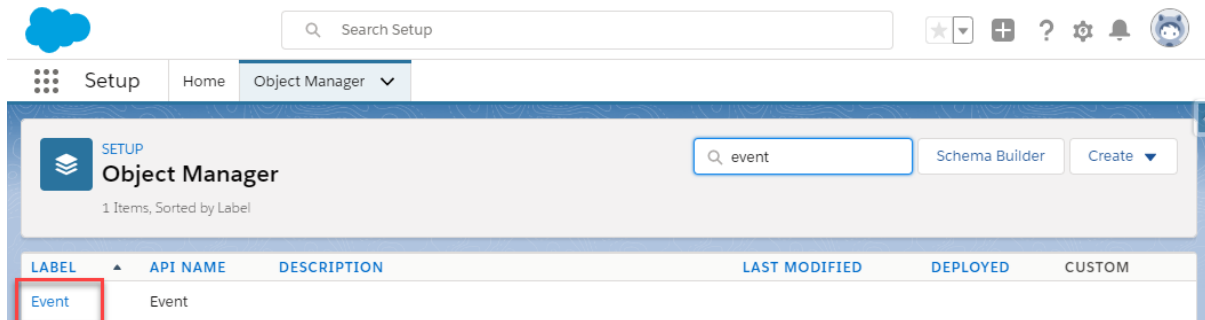
Note: Status Cascading works only when

- 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**.

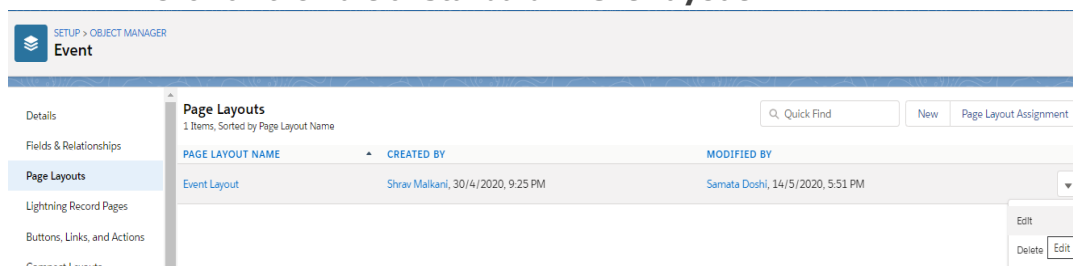


Figure 13. Event Layout

- 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](#).

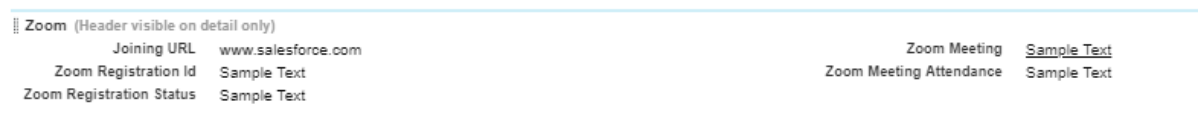


Figure 14. Zoom Event Layout Section

- 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.

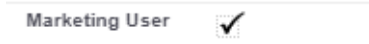


Figure 15. Marketing User checkbox

- 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**.

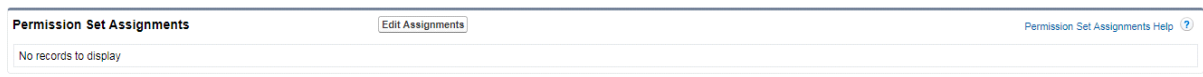
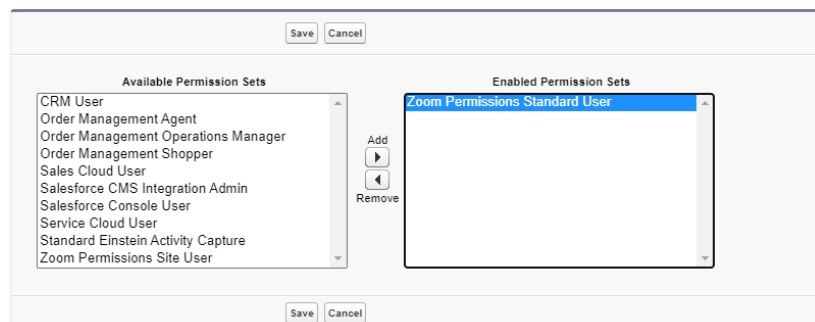


Figure 16. Zoom Permission Set Assignment

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



Refer to the User Guide to start using the application.