

**Zoom App for
Salesforce V3.7**

zoom

ADMIN SETUP GUIDE

Zoom Video Communications, Inc.

Salesforce Zoom App Admin Guide

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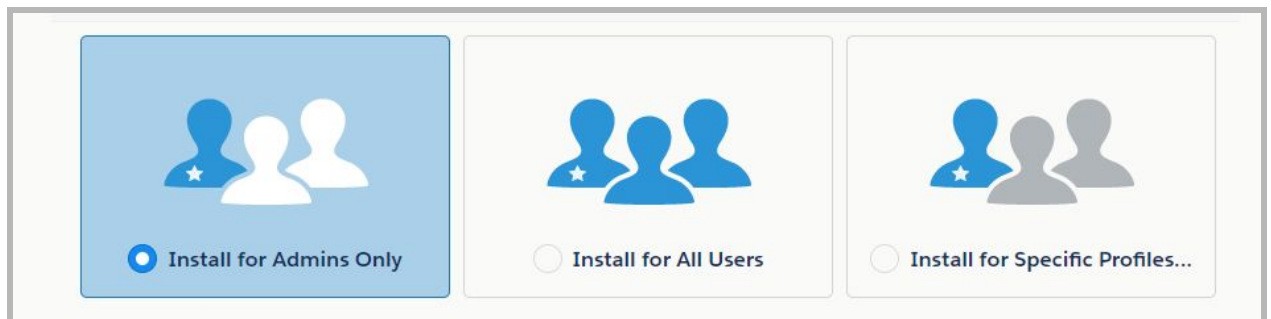
New Zoom App Installation

The following summarizes the basic steps to integrate Zoom into your Salesforce deployment.

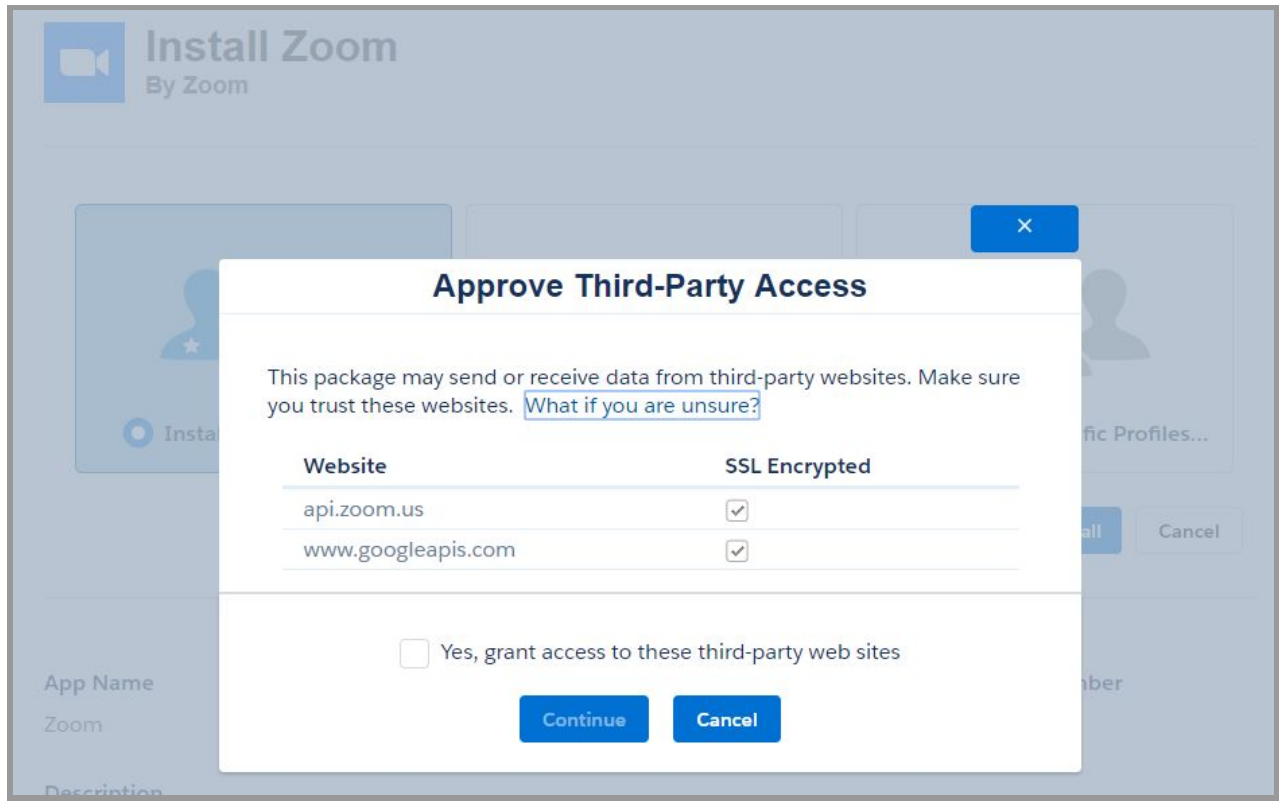
- Obtain and install Zoom app from the [Salesforce AppExchange](#)
- Configure Zoom app to connect to your Zoom account and enable desired features
- Setup user access to Zoom app
- Enable and setup desired Zoom features
- Customize Salesforce objects to include Zoom features

Obtain and Install the Zoom App in Salesforce

1. Find the Zoom App in the [Salesforce AppExchange](#) and select “Get It Now”. If prompted, log in to your Salesforce admin account (production).
2. Select if you want to install in Production or in the Sandbox.
3. Review the installation details and confirm you have read and agree to the terms and conditions.
4. Select “Confirm and Install”.
5. When shown the install options, select the option you would like to have installed and select “Install” to begin the installation. For security reasons, select “Install for Admins Only”.




6. Give access to Zoom API & Google API (If you need to integrate with Google Calendars. You can change this setting later.) Then click “Continue”. Then the app will be installed.



Configure Zoom App

1. Login to your Zoom account as an admin and navigate to the <https://marketplace.zoom.us>.
Sign in--> Develop --> Build App

Start building a new app



App Name

Name your app

Intend to publish this app on Zoom Marketplace ☐

Choose app type

☒ **Account-level app**
This app manages all users on the account and can only be installed by the account admin.

Choose authentication type...

☐ **OAuth**
An open standard that facilitates multi-tenant apps to securely authorize users and transfer data between services.

☒ **JWT API Credentials**
A secure method for facilitating server-to-server communication that does not require user login.

☐ **SDK Credentials**
A specific set of credentials that allow you to integrate Zoom directly into your apps with our SDKs.

- * 1) populate you App Name, such as 'SFDC integration'
- * 2) Intend to publish : No
- * 3) App Type : Account-level app
- * 4) Authentication type: JWT API Credentials

-->click Continue

- * 1) populate your company name
- * 2) populate contact name
- * 3) populate contact email address

App Name 21/50 Short Description

developer.zoom.us API Short description

Company Name

Your Company Name

This field cannot be empty

Developer Contact Information

Name

Your Name

This field cannot be empty

Email Address

yourname@companyname.com

This field cannot be empty

Links (optional)

Privacy Policy URL

Provide a URL link to the privacy policy for your app

https://yourcompany.com/policy

Support URL

Provide a URL link to your app's support page

Continue

--> click Continue
* get API key and secret

Information

App Credentials

Feature

Activation

App Credentials

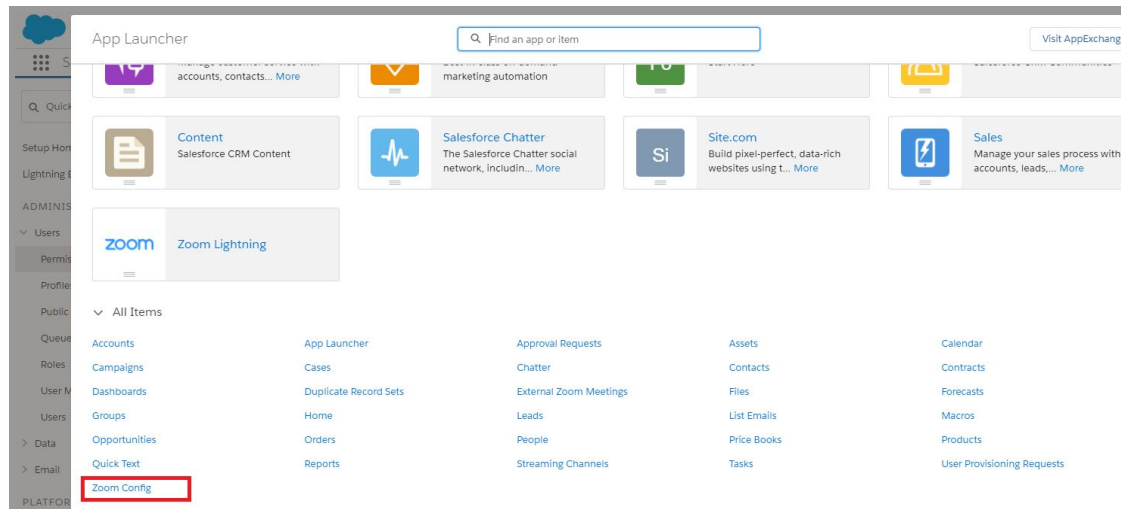
API Key

T2...g...amhv9kA Copy

API Secret

CFxa...l5e8srC0YX...PpJNC Copy Regenerate

2. Save or remember the "API Key" and "API Secret" as it will be used in a later step.
3. Go back to your Salesforce admin portal and bring up the App Launcher.



4. Click on Zoom Config and fill in:

- API key and API secret that you obtained earlier from your Zoom admin account

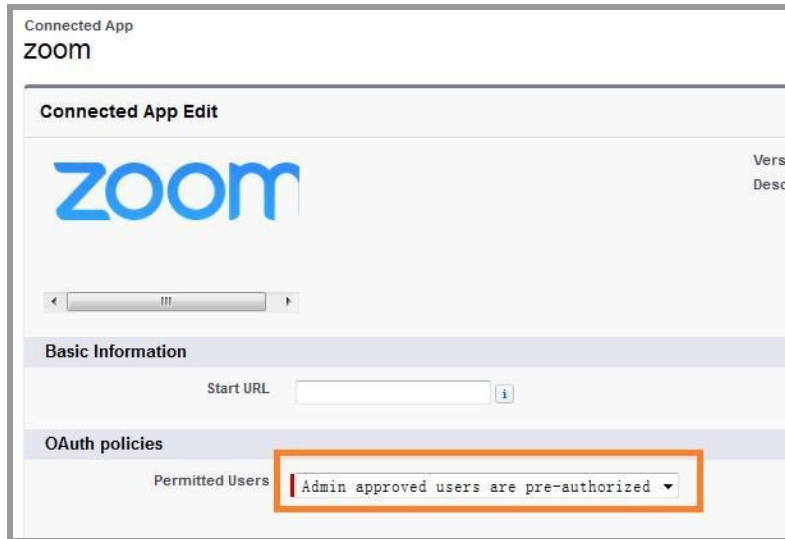
5. Under User settings, there are user personal settings for you only.

Please Follow [Upgrading Zoom App -- 1.Zoom Configuration Page](#) to set all your org and customer settings. And [Customize Salesforce Objects to include zoom feature](#).

User Setup for Access to Zoom App

By default, all users are enabled with permission to use the “**Zoom connected app**”. If that is not the desired behavior, you can change the default permission and selectively enable specific users as described in the following instructions:

1. In classic. navigate to Administration Setup -> Manage Apps -> Connected Apps and select “Edit” for the Zoom App
2. In lightning. navigate to Setup> Platform Tools > Connected Apps > Manage Connected Apps > Zoom > Edit policies.
3. Under OAuth policies, set Permitted Users to “Admin approved users are pre-authorized”.



3. Navigate to Administration- > Users -> Permission Sets and find “**Zoom Admin**” & “**Zoom User**”.
4. Clone the permission sets and give names for new permission sets.
5. Add “Zoom” connected app to both of them.
6. Assign users to **Zoom admin** and **Zoom user** permission sets as per the requirement.
(Zoom Admin has the following privileges :
 - + setting for api key and secret(org level setting)
 - + user settings for admin himself(user level setting)
 - + customized objects read/write
 - + visual force pages in zoom package*Zoom User has the following privileges :*
 - + setting for user its own with zoom meeting (like google calendar notification setting, use pmi or not, send email to attendees before launch)
 - + customized objects R/W)
 - + visual force pages in zoom package

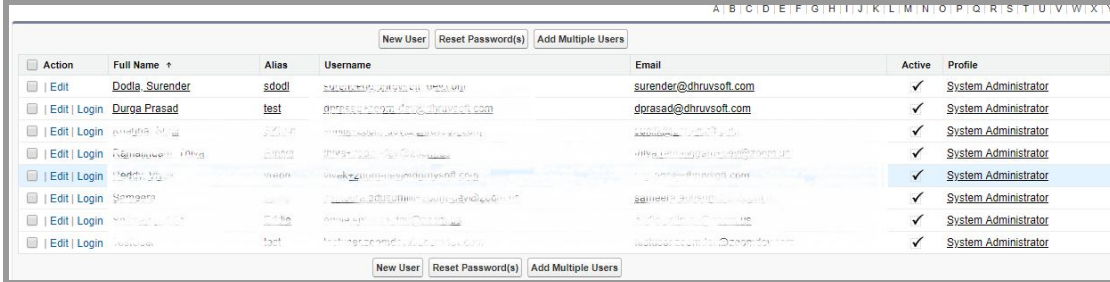
Add users to Zoom Permission Set

- a.) Add One user to the permission set: Go to **Manage Users** -> **Users**, click on the username, Edit Permission Set Assignments, add Zoom Permission Sets to the user
- b.) Add Multiple users to the permission set: Administrator can also go the Permission Set and **Manage Assignments** do add multiple users to this permission set.
 Path for lightning : Setup> Administration > Users > Permission Sets

Salesforce User and Zoom User Mapping

Important mapping for the Salesforce Zoom App to work is the email of the Salesforce user must match exactly with the email (username) of the Zoom User. Otherwise, the complete functionality will not work. It is better to maintain different email for every user in Salesforce because a Salesforce User Account is mapped with a Zoom User Account and completed app logic is built on user email.

The Email addresses of Salesforce Users are

A screenshot of the Salesforce Users list interface. At the top, there are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'. Below these is a table with columns: Action, Full Name, Alias, Username, Email, Active, and Profile. The table contains several rows of user data. The first row is for 'Dodia, Surender' with alias 'sdodi' and email 'surender@dhruvsoft.com'. The second row is for 'Durga Prasad' with alias 'test' and email 'dorasad@dhruvsoft.com'. The third row is for 'Durga Prasad' with alias 'test' and email 'dorasad@dhruvsoft.com'. The fourth row is for 'Durga Prasad' with alias 'test' and email 'dorasad@dhruvsoft.com'. The fifth row is for 'Durga Prasad' with alias 'test' and email 'dorasad@dhruvsoft.com'. The sixth row is for 'Durga Prasad' with alias 'test' and email 'dorasad@dhruvsoft.com'. The seventh row is for 'Durga Prasad' with alias 'test' and email 'dorasad@dhruvsoft.com'. The eighth row is for 'Durga Prasad' with alias 'test' and email 'dorasad@dhruvsoft.com'. The ninth row is for 'Durga Prasad' with alias 'test' and email 'dorasad@dhruvsoft.com'. The tenth row is for 'Durga Prasad' with alias 'test' and email 'dorasad@dhruvsoft.com'. At the bottom, there are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

Action	Full Name	Alias	Username	Email	Active	Profile
[Edit] [Login]	Dodia, Surender	sdodi	sdodi@dhruvsoft.com	surender@dhruvsoft.com	✓	System Administrator
[Edit] [Login]	Durga Prasad	test	dorasad@dhruvsoft.com	dorasad@dhruvsoft.com	✓	System Administrator
[Edit] [Login]	Durga Prasad	test	dorasad@dhruvsoft.com	dorasad@dhruvsoft.com	✓	System Administrator
[Edit] [Login]	Durga Prasad	test	dorasad@dhruvsoft.com	dorasad@dhruvsoft.com	✓	System Administrator
[Edit] [Login]	Durga Prasad	test	dorasad@dhruvsoft.com	dorasad@dhruvsoft.com	✓	System Administrator
[Edit] [Login]	Durga Prasad	test	dorasad@dhruvsoft.com	dorasad@dhruvsoft.com	✓	System Administrator
[Edit] [Login]	Durga Prasad	test	dorasad@dhruvsoft.com	dorasad@dhruvsoft.com	✓	System Administrator
[Edit] [Login]	Durga Prasad	test	dorasad@dhruvsoft.com	dorasad@dhruvsoft.com	✓	System Administrator
[Edit] [Login]	Durga Prasad	test	dorasad@dhruvsoft.com	dorasad@dhruvsoft.com	✓	System Administrator
[Edit] [Login]	Durga Prasad	test	dorasad@dhruvsoft.com	dorasad@dhruvsoft.com	✓	System Administrator

Emails must be exactly matched with Zoom Users emails / Username

Upgrading Zoom App

Checking for the Latest Version

1. In Salesforce under Setup > Installed Packages > you will see the Zoom App with version number mentioned.
2. To know the latest version of Zoom app, go to [App Exchange Link - Zoom](#). Under “Additional Information”, you will find the current package version, released date and other details.

Upgrade

Process <https://appexchange.salesforce.com/appxListingDetail?listingId=a0N30000000qEuqEAE>

If you want to install the latest version of Zoom App, install from AppExchange which is an upgrade. Previously if you have given access to only System Admin or Selected Profiles but you want to give access for all users now, it's better to upgrade the same package by selecting all users while installing.



Upgrade Zoom

By Zoom



An earlier version is installed. It can be upgraded while preserving the existing data.
Installed: Zoom () New Version: Zoom ()



☐ Install for Admins Only



☒ Install for All Users



☐ Install for Specific Profiles...

Upgrade

Cancel

Enable and Configure Zoom features

1. Zoom Configuration page

The screenshot shows the 'Configuration Panel' for Zoom settings. It is divided into several sections: Zoom Settings, User Settings, User Password Settings, User Google Calendar API Settings, and a section for creating events for non-Salesforce Zoom meetings. The Zoom Settings section includes fields for Zoom API Key and Zoom API Secret, a Mail Default From Address, and checkboxes for Populate Details into Event Description, Enable Webinar Feature, Disable Invitation Email, and Enable Password For Non-PMI Meeting. The User Settings section includes checkboxes for PMI Enabled For Scheduled Meeting, Send Email to Attendees at Launch, Send ICS in Invitation Email, and Disable Invitation Email. The User Password Settings section includes a PMI Meeting Password field and radio buttons for Non-PMI Meeting Password options. The User Google Calendar API Settings section includes checkboxes for Active, API Key, Client Id, and Client Secret. The final section, 'Create Events for Non Salesforce Zoom Meetings for matching Contacts / Leads', has an Active checkbox.

Configuration Panel	
Zoom Settings	
Zoom API Key	[Redacted]
Zoom API Secret	[Redacted]
Mail Default From Address	[Redacted]
Populate Details into Event Description	<input checked="" type="checkbox"/>
Enable Webinar Feature	<input type="checkbox"/>
Disable Invitation Email	<input type="checkbox"/>
Enable Password For Non-PMI Meeting	<input checked="" type="checkbox"/>
User Settings	
PMI Enabled For Scheduled Meeting	<input type="checkbox"/>
Send Email to Attendees at Launch	<input checked="" type="checkbox"/>
Send ICS in Invitation Email	<input checked="" type="checkbox"/>
Disable Invitation Email	<input type="checkbox"/>
User Password Settings	
PMI Meeting Password (on zoom.us)	123
Non-PMI Meeting Password	<input type="radio"/> use PMI password for all non-PMI meetings <input type="radio"/> set a password for all non-PMI meetings <input checked="" type="radio"/> generate a random password for each non-PMI meeting
User Google Calendar API Settings	
Active	<input type="checkbox"/>
API Key	AIzaSyDFUuIXe7HBWpcyQxv2EwMhSkYkVs52Nok
Client Id	609137684096-sgllgtrh38258r2vni0lugfppv1d939p.apps.googleusercontent.com
Client Secret	Vj2m-XqjzX1a6xilaJR7IKx
Create Events for Non Salesforce Zoom Meetings for matching Contacts / Leads	
Active	<input type="checkbox"/>

A) Zoom Settings

Zoom Setting is a global setting over your org. Only User with 'Zoom Admin' permission set could view and edit this section.

- **Zoom API Key and Secret** is the account level credential of your company . You can get this from zoom developer page: <https://developer.zoom.us/me/#>
- **Mail Default From Address** - If you want to set an outbound email for all your meeting invitation emails, you should first add an Org-Wide-Email to your org, grant access to all profiles and validate it in your email; Then Select one Org-Wide-Email as the 'Mail Default From address' (before version 2.3 you should go to Custom Setting -- zoom config-- 'Mail Default From Address' to config this.)

- **Populate Details into Event Description** - Enable automatically populating meeting details into the Description field of Event. If you are using 'Salesforce for Outlook' to sync the salesforce event to your outlook calendar, you'd better check this option on.
- **Disable Invitation Email** - Prevents invitation emails to be sent when a Zoom meeting is created.
- **Enable Password for Non-PMI Meeting** - When enabled, all non-PMI meetings created will require a password to join. The password is determined by the user's settings in the "User Password Settings" configuration.

B) 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.

C) User Password Settings

- **PMI Meeting Password** - displays the PMI meeting password configured on zoom.us. If "password required" is enabled for PMI scheduled meetings in the user's zoom.us meeting settings, the displayed password must be used to join the meeting. This password will also be used for instant meetings if the user's instant meeting setting in zoom.us is set to use PMI.
- **Non-PMI Meeting Password** - users can select which option to use for determining the password for non-PMI meetings if the "Enable Password for Non-PMI Meeting" option is enabled. Options include:
 - Using the user's PMI password
 - Configuring a 1-10 digit numeric-only password
 - Letting the system generate a 6-digit number-only password for each non-PMI meeting
 This setting will be used for all scheduled non-PMI meetings. It will also be used for instant meetings if the user's instant meeting setting in zoom.us is not set to use PMI.

Note: A new email template (v3) has been created which contains the meeting password. If you previously customized the email template you will need to customize the new email template accordingly (the previous template is no longer used). If no customization was previously done, no action is required.

D) User Google Calendar API Setting

To sync your zoom meeting to your google calendar, you can follow the steps below to set your google settings on zoom config page.

1.Go to <https://console.developers.google.com/projectselector/apis/library?pli=1> and verify you are logged into to the correct Google account.(Your google account should be the email address of your salesforce user)

2. Click the "Create" button and create a new project by entering a Project Name and clicking the "CREATE" button.
3. Search for Google Calendar API and click "ENABLE" button.
4. Click "Credentials" from left side panel and then click "Credentials in APIs & Services".
5. Click on the "OAuth consent screen" tab and fill in "Application name".
6. Add "force.com" in the "Authorized domains" section and click "Save".
7. Click the "Create credentials" dropdown and select "OAuth client ID".
8. Go to Salesforce "Zoom Config" page - copy and save the URL until the end of "ZoomDetail" - i.e. "https:// /apex/ZoomDetail" (will be used in the next step).
9. Select "Web application" and add the URL from the previous step as an "Authorized redirect URI".
10. Click "Create" button. Copy and save the client ID and client secret displayed in the pop up and then click "OK".
11. Click the "Create credentials" dropdown and select "API Key". Copy and save the API key displayed in the pop up and then click "CLOSE".
12. Go to Salesforce and configure the previously saved Client ID, Client Secret and API Key in the "Google Calendar API Settings" in "Zoom Config" page.

E) Create Events for Non Salesforce Zoom Meetings for matching Contacts / Leads

Automate the creation of event for the Zoom meetings created outside Salesforce for matching Contacts / Leads. This feature will pull the zoom meetings that are created outside of salesforce into salesforce. You can select the following option to activate this feature.

2. Enable Remote site settings

Go to Setup > Security Controls > Remote Site Settings

Edit the Zoom & Google API and enable them.

Edit Del	GoogleAPI	—	https://www.googleapis.com	✓
Edit Del	Zoom Api	—	https://api.zoom.us	✓
Edit Del	ApexDevNet	—	http://www.apexdevnet.com	✓

Customize Salesforce objects to include Zoom features

Event Page Layout Customization

**Don't add other pages to the page layouts which are not in the documentation. It leads to app malfunction.
Ex: StartZoomMeeting or MakeZoomMeeting pages. Don't add these pages.**

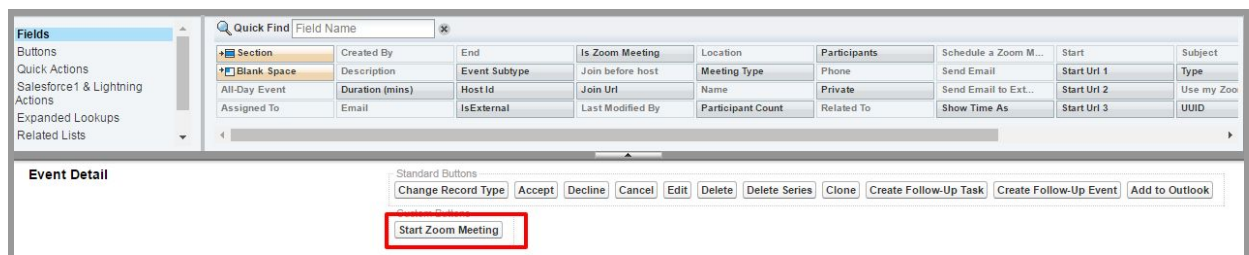
Step 1. Edit your Event Page Layout



Step 2. Move the Button, Fields and Visualforce page to the Event Detail Section in Event Page Layout.

Move the button “**Start Zoom Meeting**” to the layout.

Move the “**Start Zoom Meeting**” action to the layout for classic and lightning.



Create new section “**Zoom Meeting Information**” and add following fields.

1. Use my Zoom PMI
2. Join Before Host
3. Schedule a zoom meeting
4. Send Email to External Attendees

If you want to use time zone feature for the event, add below fields too to the layout.

1. Customer Timezone
2. Customer Start Time
3. Customer Meeting Duration

Create another section **“Zoom Meeting Details”** and add **“ZoomEventDetails”** Visualforce page to this section and Height (in pixels) as **“400”** and save it. You can increase as per your requirement.

The screenshot shows a Salesforce record page for a Zoom meeting. The page is divided into several sections: 'Calendar Details', 'Other Information', 'Zoom Meeting Information', and 'Zoom Meeting Details'. The 'Zoom Meeting Details' section is highlighted in blue and contains a Visualforce page named 'ZoomEventDetails'.

Lead Page Layout Customization

Step 1. Edit your Lead Page Layout

This page allows you to create different page layouts to display Lead data. After creating page layouts, click the Page Layout Assignment button to control which page layout users see.

Action	Page Layout Name	Created By
Edit Del	Lead Layout	Zoom Integration , 11/28/2012 3:34 PM

Step 2. Move the button “Start Zoom Meeting” to the detail section

Move the button **“Start Zoom Meeting”** to the layout.

Move the **“Start Zoom Meeting”** action to the layout for classic and lightning.

The screenshot shows the 'Lead Detail' page in Salesforce. The page has a sidebar with 'Fields', 'Buttons', 'Custom Links', 'Quick Actions', 'Salesforce1 Actions', 'Expanded Lookups', and 'Related Lists'. The main content area shows a table with columns 'Fields', 'Buttons', and 'Custom Buttons'. The 'Start Zoom Meeting' button is highlighted with a red box.

Contact Page Layout Customization

Step 1. Edit your Contact Page Layout

This page allows you to create different page layouts to display Contact data.
After creating page layouts, click the Page Layout Assignment button to control which page layout users see.

Contact Page Layouts New Page Layout Assignment

Action	Page Layout Name	Created By
Edit Del	Contact Layout	Zoom Integration , 11/28/2012 3:34 PM

Step 2. Move the button “Start Zoom Meeting” to the detail section

Move the button “Start Zoom Meeting” to the layout.

Move the “Start Zoom Meeting” action to the layout for classic and lightning.

Fields

Buttons
Custom Links
Quick Actions
Salesforce1 Actions
Expanded Lookups
Related Lists

Quick Find: Field Name *

Section	Assistant	Created By	Do Not Call	Fax	Google Analytics ...	InsideView Created
Blank Space	Asst. Phone	Data.com Key	Email	Fax Opt Out	Google Analytics ...	InsideView Date L...
Account Name	Birthdate	Department	Email Opt Out	Google Analytics ...	Google Analytics ...	InsideView User L...
Act-On Lead Score	Contact Owner	Description	Ext	Google Analytics ...	Home Phone	isCreatedUpdatedFlag

Zoom for Salesforce Setup Guide (1).docx

Contact Detail

Standard Buttons: Edit Delete Clone Sharing Request Update

Custom Buttons: Send to Pardot Send Engage Email **Start Zoom Meeting**

Other objects Page Layout Customization

1. Similarly, you can customize for Case object too.
2. If field service lightning enabled, you can customize similarly for “Service Appointments” object. But button not available for that. You can start zoom meeting from “Start Zoom Meeting” action.

Enable feed tracking

For any object actions are not visible, need to enable feed tracking for that object.

Visit https://help.salesforce.com/articleView?id=collab_feed_tracking.htm&type=5

Check Email Deliverability

- Setup > Email Administration > Deliverability
- Verify Access level is set to "All email".

Admin Features

Reports

Open the "Zoom Report" folder under Report tab. This folder contains 3 different types of 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.

Note: - You will find reports with "New" appended to name. Those are new reports after the data model changed. Earlier all data present on Event only. Now you will find data will be saved to new custom object.

Syncing Non-Salesforce Zoom Meeting into Salesforce

To sync zoom meetings which are created outside of salesforce, can be synced and saved as events by attaching to respective contact or lead. But to link events, host of zoom meeting should be owner of the respective contact or lead. The zoom meeting host should match with owner of any contact or lead. Then events will be created automatically. If this is not matched, such meetings will be shown on External Zoom meetings page, of respective users.

To start syncing, on the zoom configuration page,

Tick the “Active” check box, and enter the start time and interval required. So, as per the interval given, jobs will be scheduled automatically in background to fetch the external zoom meetings.

All Scheduled Jobs Help

The All Scheduled Jobs page lists all of the jobs scheduled by your users. Multiple job types may display on this page. You can delete scheduled jobs if you have the permission to do so.

View: All Scheduled Jobs [Create New View](#)

Action	Job Name	Submitted By	Submitted	Started	Next Scheduled Run	Type
Del	ExternalZoomMeeting Schedule	Dodla_Surender	8/16/2018 3:50 PM		8/16/2018 4:32 PM	Scheduled Apex
Del	ZoomMeetingMetrics Schedule	Dodla_Surender	8/16/2018 3:50 PM		8/16/2018 3:59 PM	Scheduled Apex

Frequently Asked Questions

1. Meeting Id is showing as null

Solution: Make sure “Remote Site” Settings are correct. Only Admins have access to change.

2. No mail is being received from Salesforce

Solution: Check “Email Deliverability” settings. Change to “All mail”.

3. What is the requirement/conditions to sync a external zoom meeting to Salesforce?

Solution: The zoom meeting host should match with owner of any contact or lead. Then events will be created automatically. If this is not matched, such meetings will be shown on External Zoom meetings page, of respective users.

4. Where can we see the zoom meeting data related to the Event.

Solution: On the page layout, you need to add “ZoomEventDetails” visualforce page.

5. I get an Error of Zoom_Meeting_Creation_Status , it’s said ‘Your email is not a valid Zoom User, Please check with your Administrator’

Solution: the email of your salesforce user is not a zoom account user, please ask your zoom account admin to invite you as a zoom user.

6. I get an Error of Zoom_Meeting_Creation_Status , it’s said ‘Schedule Meeting for xxxx@mail.xx.com Failed, you are not an assigned scheduler. Please check schedule for settings on zoom.us’

Solution: To change the owner of zoom meeting on salesforce, you should get the new owner’s approval for ‘schedule for’ setting on zoom web. please ask the target user sign in to zoom web and add your email address to My Meeting Setting → Schedule Privilege

https://zoom.us/profile/setting

om

SOLUTIONS ▾

PLANS & PRICING

CONTACT SALES

SCHEDULE A MEE

Schedule Meeting

In Meeting (Basic)

In Meeting (Advanced)

Email Notification

Other

Hide snapshot on iOS task switcher

Enable this option to hide potentially sensitive information from the snapshot of the Zoom main window. This snapshot display as the preview screen in the iOS tasks switcher when multiple apps are open.

Invitation Email

Your meeting attendees will receive emails in language based upon their browser/profile settings. Choose languages which your expected attendees will receive content in to edit.

Choose email in language to edit

English ▾

[Send me a preview email](#)

Schedule Privilege

You can assign users in your account to schedule meetings on your behalf. You can also schedule meetings on behalf of someone that has assigned you scheduling privilege. You and the assigned scheduler must be on a Paid plan within the same account.

Assign scheduling privilege to +

36 24@.com x

I can schedule for

No one

Integration Authentication

key: n09jifQTSJW2srTafxBsBA

Secret: IOYp43P52u69mq1hTyhWLxEmEANQvreT9kw

Regenerate

19