

Scaleable Zoom



Scaleable Zoom

SCALEABLE ZOOM - A MICROSOFT DYNAMICS 365 SOLUTION

BY



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Contents

- Scaleable Zoom 4
- Download Scaleable Zoom:..... 4
- Dynamics 365 Apps..... 4
- Welcome Screen 5
- Registration..... 5
 - Setup: 5
 - Payment: 6
- Configuration 7
- JWT App: 7
- Bearer Token:..... 11
- Delete Zoom Meetings Settings:..... 12
- Zoom Email Notification Settings:..... 12
- Email Templates:..... 13
 - Instant Meeting Invitation Template: 14
 - Scheduled Meeting Invitation Template: 16
 - Meeting Reminder Template: 17
- Sync Zoom meetings to Dynamics 365: 19
- User Roles: 19
 - Scaleable Zoom Admin: 19
 - Scaleable Zoom Read: 19
 - Scaleable Zoom Service: 19
- Assign Scaleable Zoom Role:..... 20
- Zoom Meeting Views: 22
 - Calendar View: 22
 - Grid View:..... 23
- Meeting Details..... 24
 - Delete Meetings:..... 25
 - More Details:..... 25
- Zoom User:..... 26
- Create Zoom Meetings: 27
 - From Calendar:..... 27
 - From Toolbar:..... 28

Scheduled Zoom Meetings:	28
Recurring Meetings:.....	28
Daily:	29
Weekly:	30
Monthly:.....	31
Non-Recurring Meetings:.....	32
Meeting URL and ID:	33
Meeting logs:	33
Instant Meetings:	34
Meetings from Contacts/Leads/Marketing Lists:	35
Single Contact/Lead:	35
Multiple Contacts/Leads:	36
Marketing List:	36
Unsubscribe:	38
Uninstall:	39

Scaleable Zoom

Scaleable Zoom is an integration between Zoom and Dynamics 365 which allows you to start and schedule meetings directly within Dynamics 365 Sales. Scaleable Zoom has now revolutionized the way how teams communicate within Dynamics 365. Now coming together face to face with just a single touch by quickly set up Zoom Meetings.

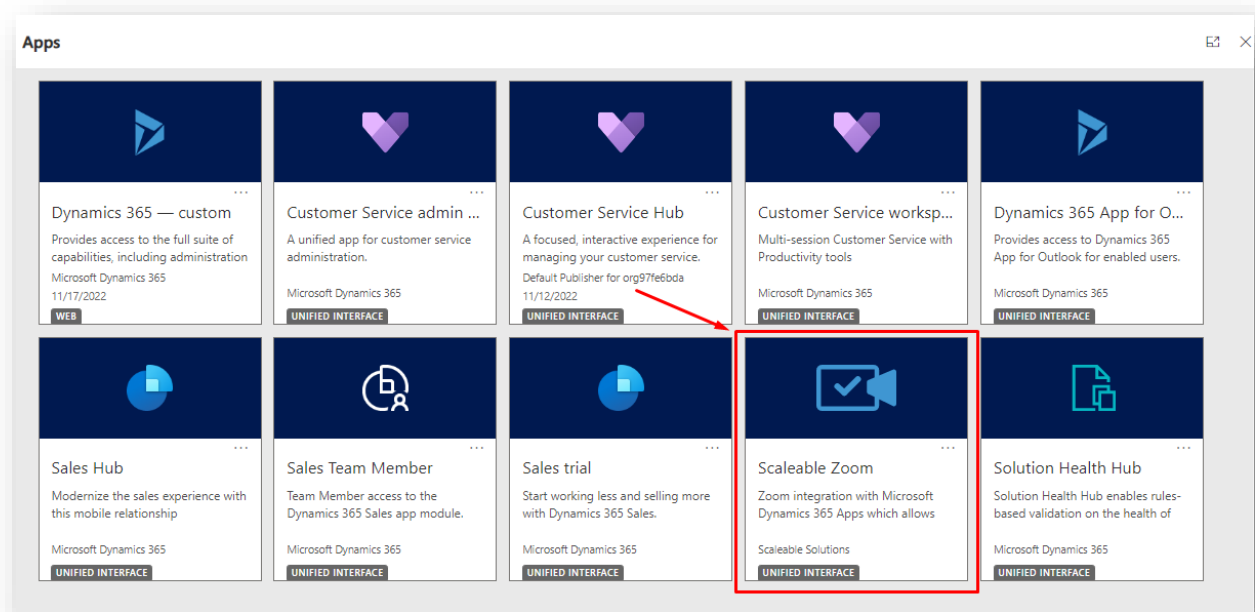
Download Scaleable Zoom:

Please follow the following steps to start using Scaleable Zoom

Download Scaleable Zoom from [Microsoft AppSource](#)

Dynamics 365 Apps

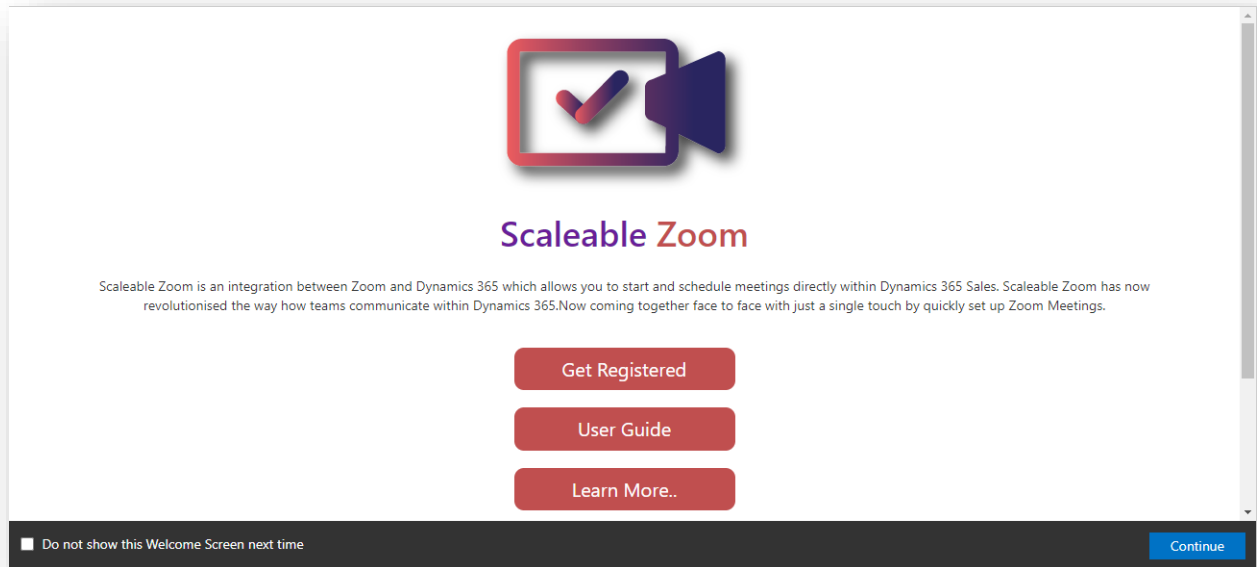
On Dynamics 365 apps you will find the Scaleable Zoom Application.



Click on Scaleable Zoom.

Welcome Screen

Welcome screen will appear. You can get Registered, Download User Guide and Learn More about the app and get access to our social Links from this page.

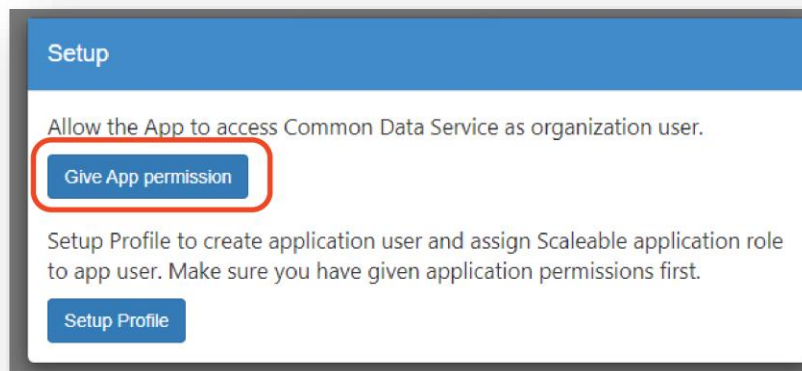


Registration

To get yourself registered, Click on **Get Registered**

Setup:

Give app permissions to allow Scaleable Zoom to access the Common Data Service as an organization user and then Setup Profile.



On Registration form, fill out the **General information**. Select your **Subscription Plan** or **Trial**. Check **Terms and Conditions** and then hit **Submit** Button.

Please note that Trial Version will be available for 30-days after registration, in order to continue using Scaleable Zoom you need to subscribe by choosing Subscription Plan.

Scaleable Zoom: You are using Trial version. Please subscribe to avail continuous Scaleable Zoom services.

Registration

General Information

First Name * Last Name * [Edit](#)

Company * Phone *

Email * Alternative Email

Country * State/Province *

City * Postal Code *

Address1 *

Address2

Subscription Plan

1 Month **Free** Trial Subscribe For £ 1 /user/month

I agree with Terms and Conditions

[Unsubscribe](#) [Submit](#)

Payment:

If you have selected to Subscribe, you'll be able to make payments via Stripe.

Note: Price is per user per month. The enabled users will be counted automatically.

Enter your payment details and click **Pay**.

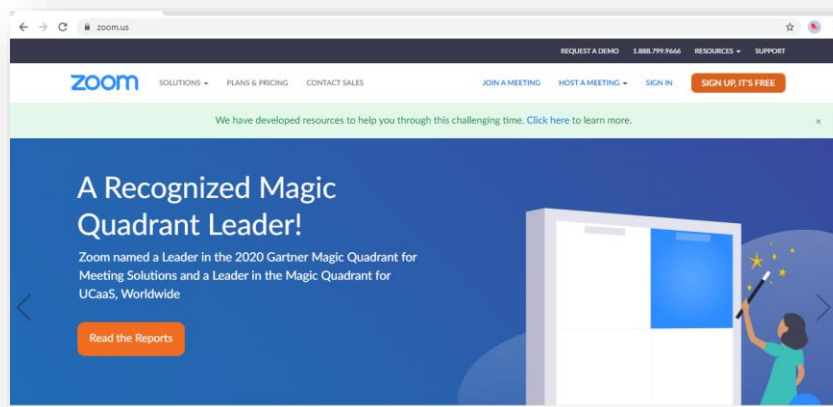
Configuration

Configure your zoom account to create your meetings within Dynamics 365.

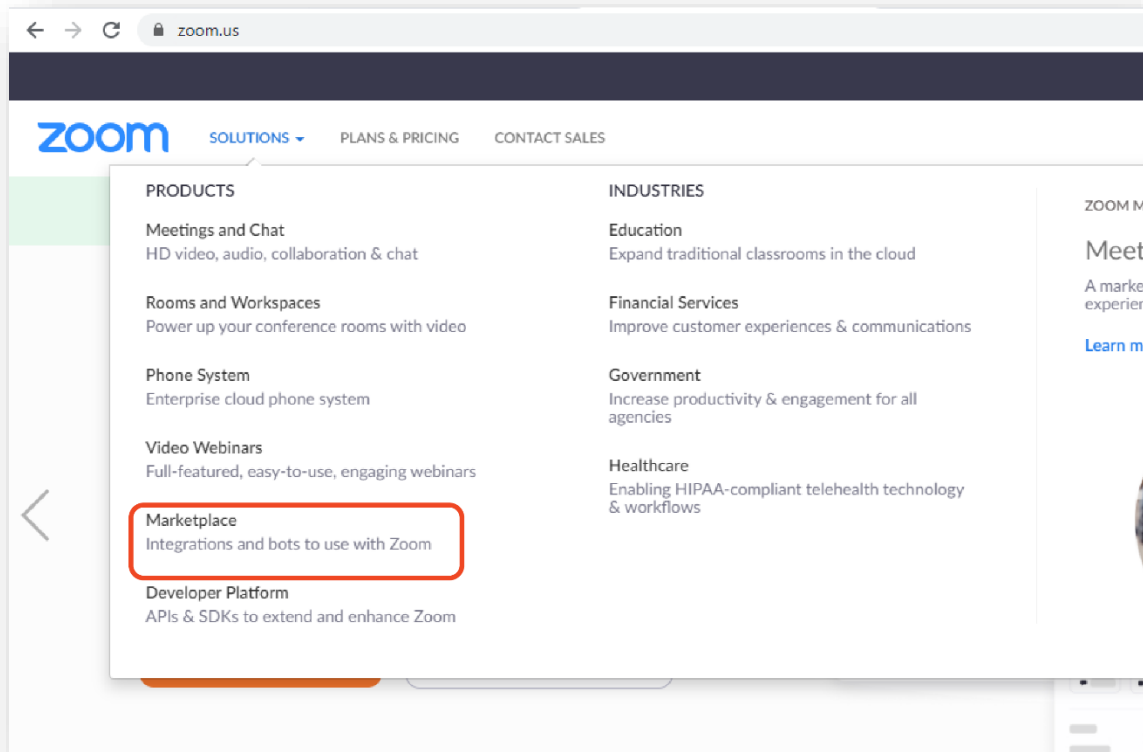
JWT App:

To configure you need create a JWT app in your zoom account.

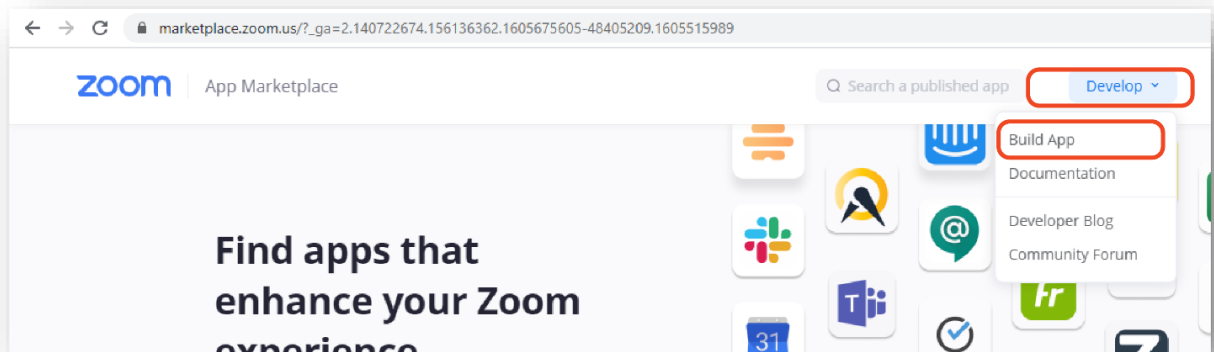
Login to your zoom account. If you don't have an account on zoom [create one](#).



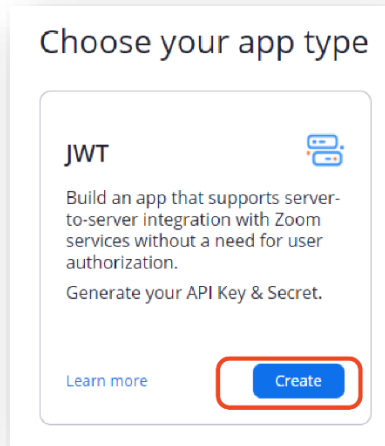
From your zoom account, go to app Marketplace



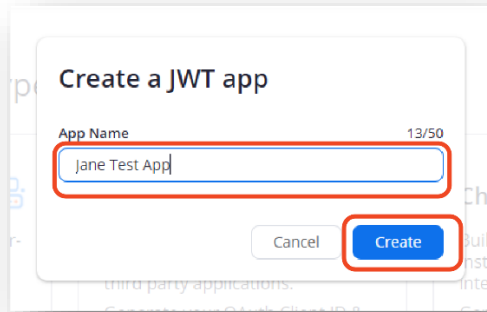
From the **Develop** Dropdown, select **Build App**



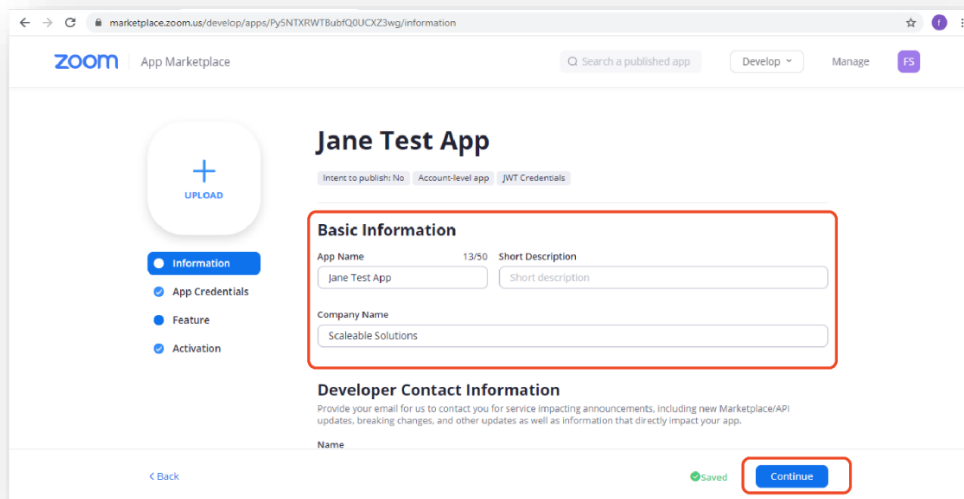
Create a JWT app.

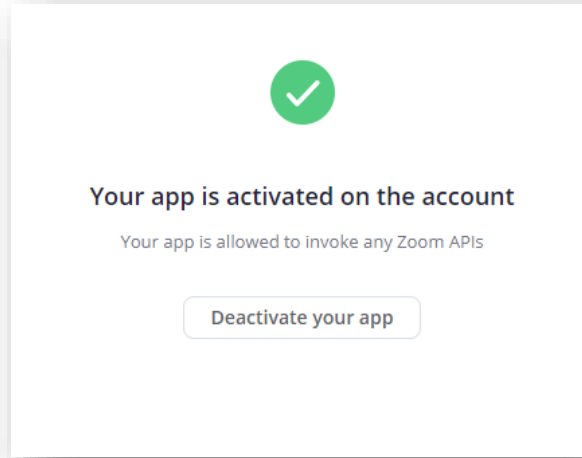


Name your app and click create



Fill in the form and click Continue.

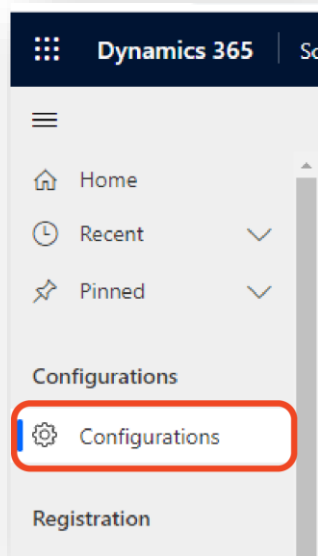




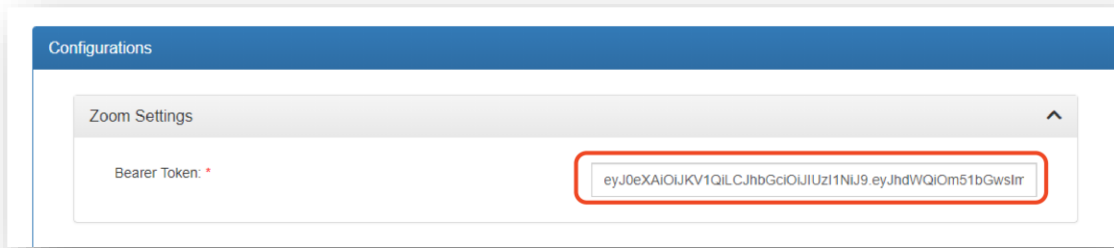
Bearer Token:

Click on **Configuration** from site map.

Note: Make sure to Register before configuring.



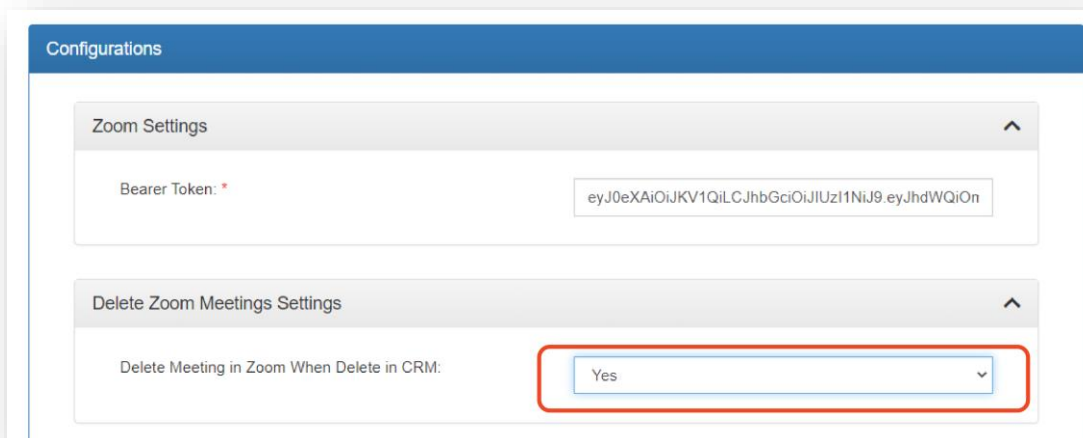
Paste the JWT token in Bearer Token of Zoom Settings.



Note - Make sure that you are using the zoom account which is registered on the same email id as your CRM user primary email otherwise you won't create meetings.

Delete Zoom Meetings Settings:

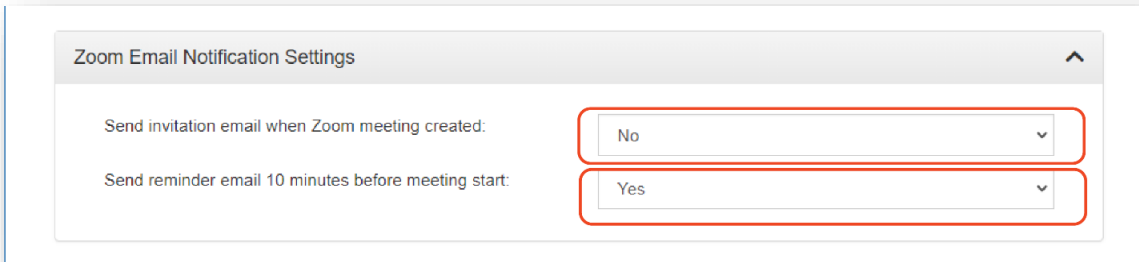
Scaleable zoom allow you to delete the zoom meeting automatically when the meeting is deleted from Dynamics 365. Set the value "Yes" to enable automatic deletion.



Zoom Email Notification Settings:

Set **Send invitation email when Zoom meeting created** "Yes", to send invitation email of your zoom meeting to the recipients as soon as the meeting is created.

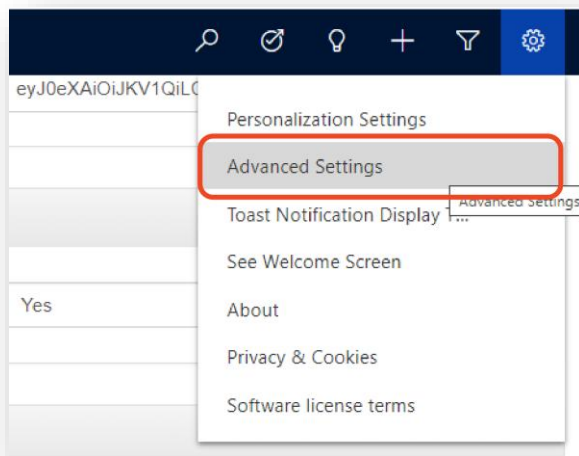
Set **Send reminder email 10 minutes before meeting start** "Yes" to send a reminder email to your recipients.



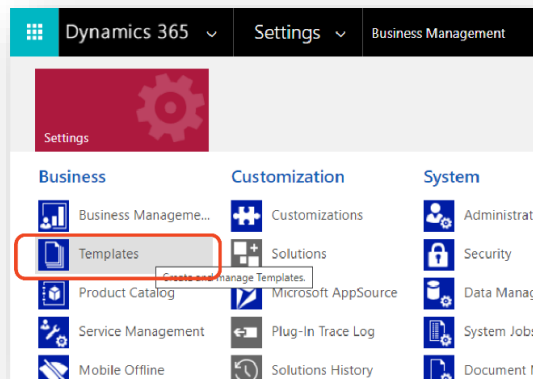
Note: You can find the email templates of the invitation and reminder email.

Email Templates:

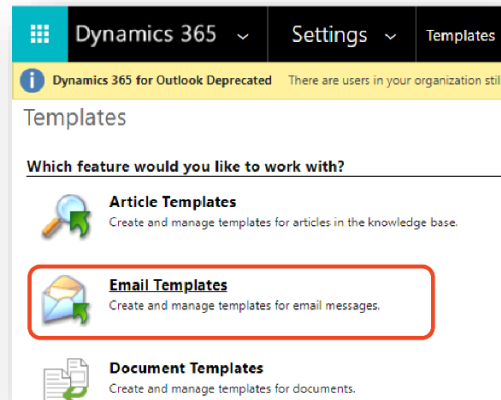
To change or review the template, go to the **Advanced Settings**



Select Templates



Select email templates



The screenshot shows the 'Email Templates' list view in Dynamics 365. The table has columns for 'Title', 'Template Type', 'Viewable By', 'Language', and 'Reply'. Three rows are highlighted with red boxes: 'Scaleable zoom instant meeting invitation email', 'Scaleable zoom meeting invitation email', and 'Scaleable zoom meeting reminder email'. The table also includes a 'New' button, a 'Run Workflow...' button, a 'Start Dialog' button, and a 'More Actions' dropdown menu. At the bottom, there is a pagination bar showing '1 - 48 of 48 (0 selected)' and a filter bar with 'All' and letters A through M.

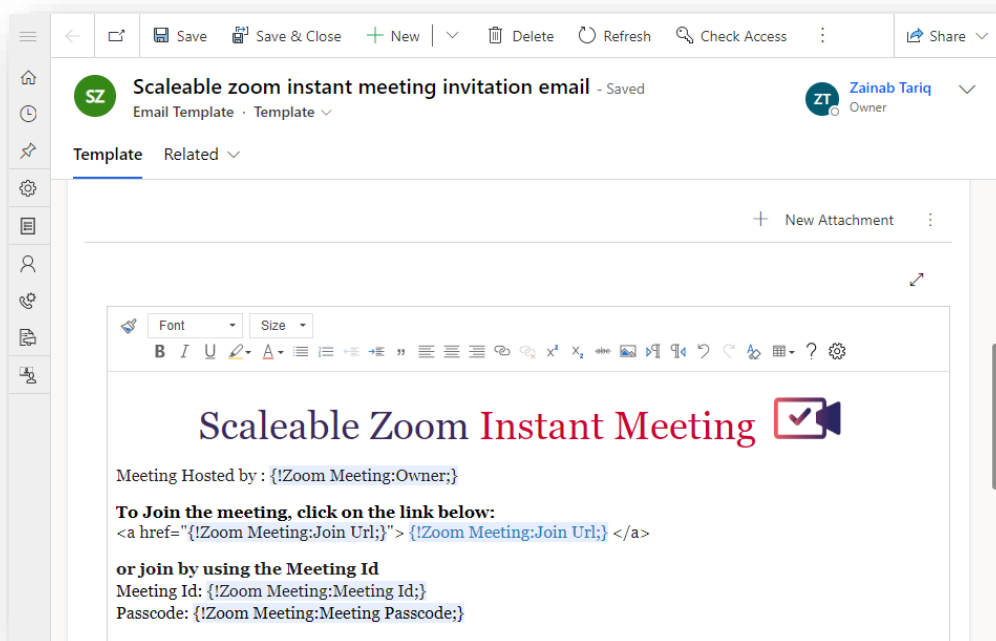
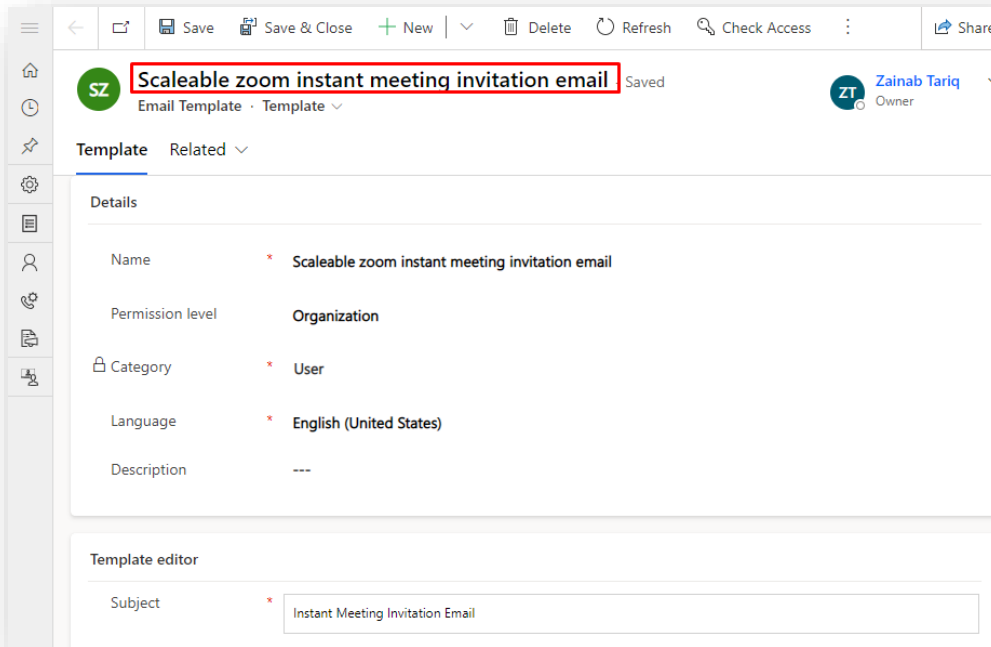
<input type="checkbox"/>	Title ↑	Template Type	Viewable By	Language	Reply
	Meeting for product demo requests - share mee...	Opportunity	Organization	English(1033)	
	New Case Acknowledgement	Case	Organization	English(1033)	
	New Opportunity Creation Notification (Internal)	Opportunity	Organization	English(1033)	
	Order Thank You	Order	Organization	English(1033)	
	Scaleable zoom instant meeting invitation email	Global	Organization	English(1033)	
	Scaleable zoom meeting invitation email	Global	Organization	English(1033)	
	Scaleable zoom meeting reminder email	Global	Organization	English(1033)	
	Thank you for registering with us	Contact	Organization	English(1033)	
	Upcoming account renewal - follow up meeting	Account	Organization	English(1033)	
	Upcoming account renewal - inform about rene...	Account	Organization	English(1033)	

Scaleable zoom email templates are available.

Instant Meeting Invitation Template:

Scaleable zoom instant meeting invitation email will be sent to the recipients of instant meetings as soon as the meeting is created.

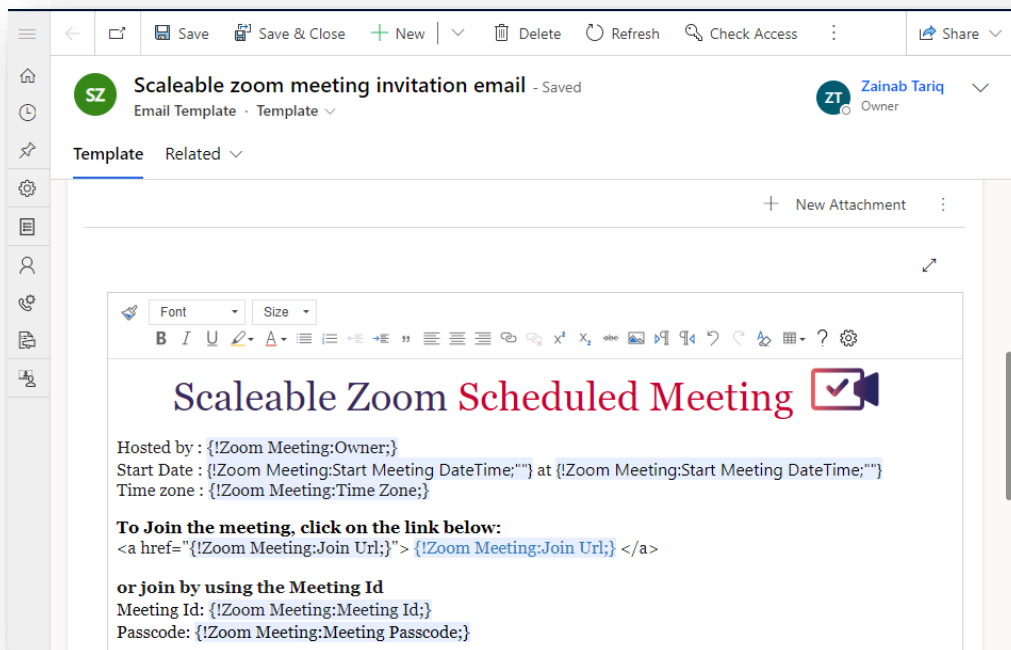
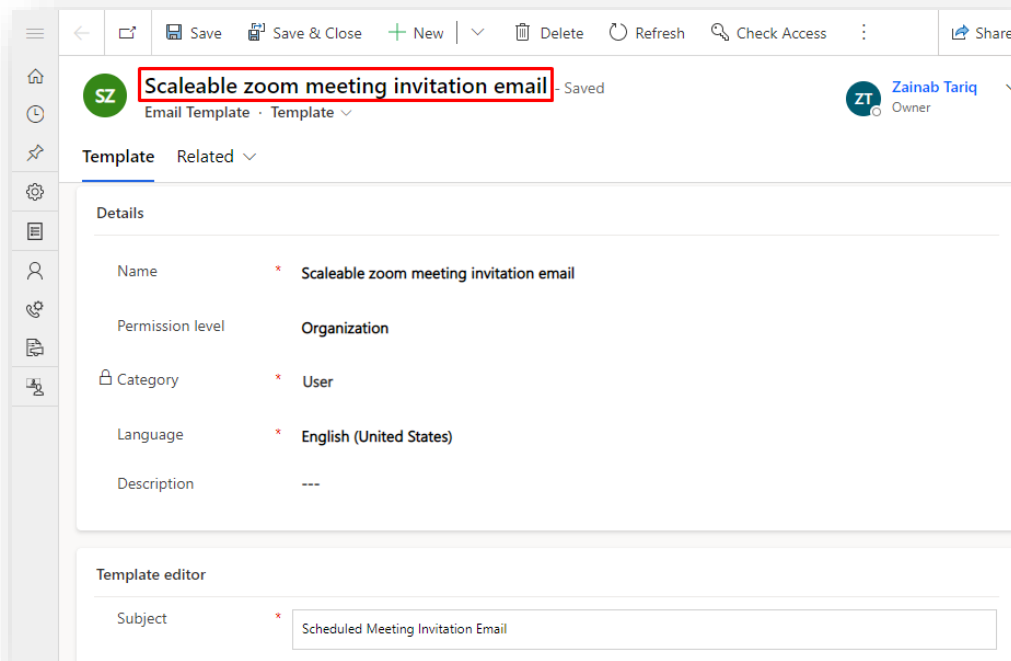
Click to open the template.



A link to join the meeting and the owner of the meeting is available in template. You can change, add or remove the meeting details in email template.

Scheduled Meeting Invitation Template:

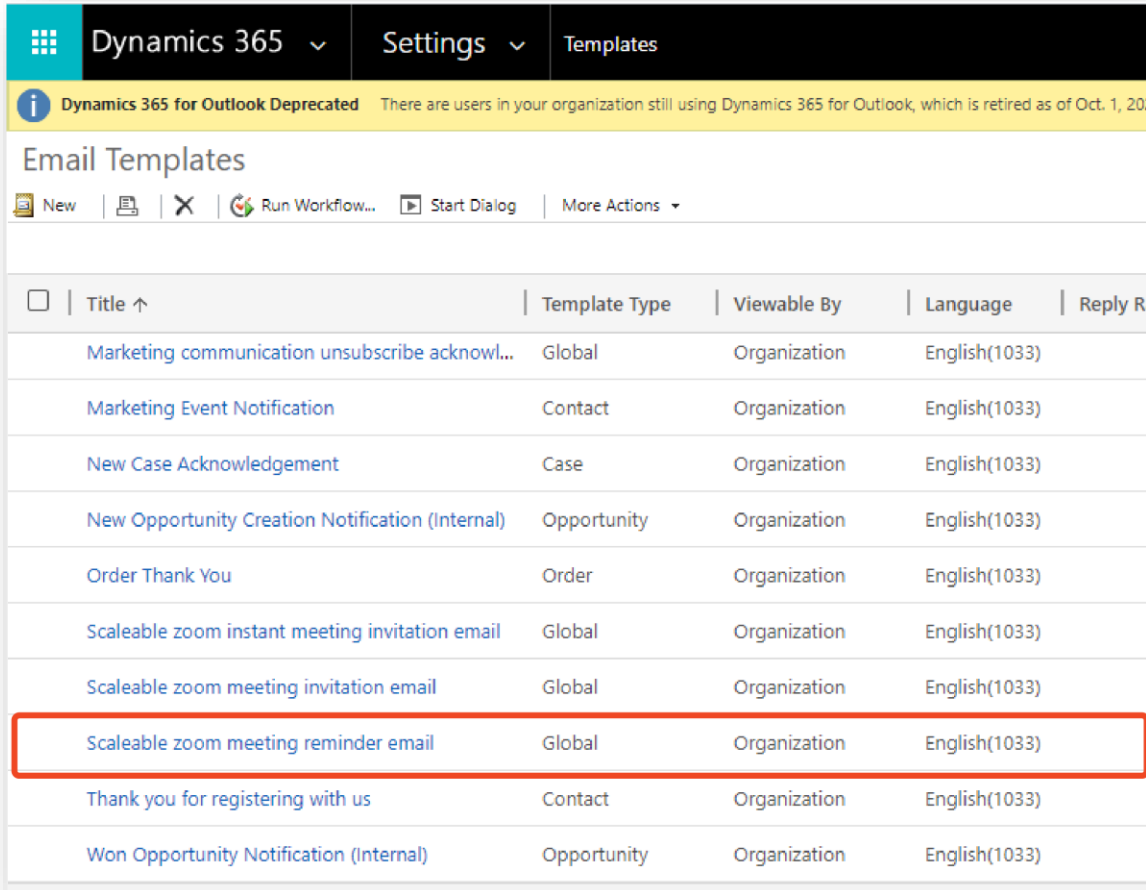
Similarly, Click on **Scaleable Zoom meeting invitation email** to view the email template of scheduled meeting invitation email, it will be sent to the recipients as soon as the meeting is created.



The email template contains the host, Start and end date time, time zone and link to join the meeting.

Meeting Reminder Template:

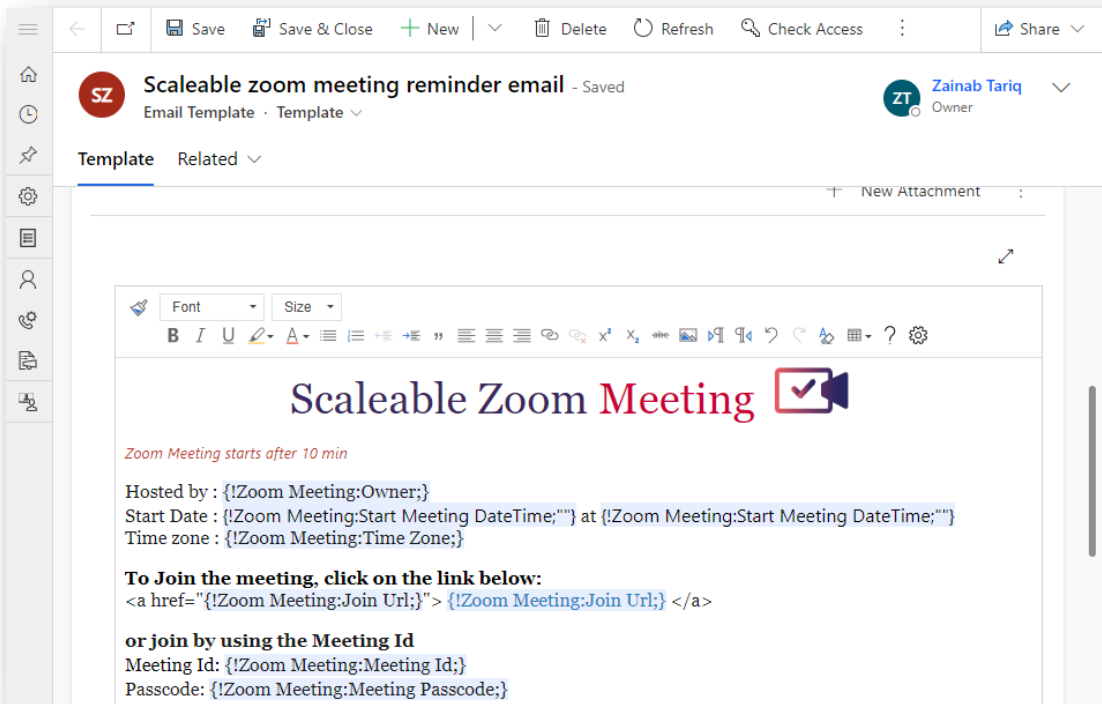
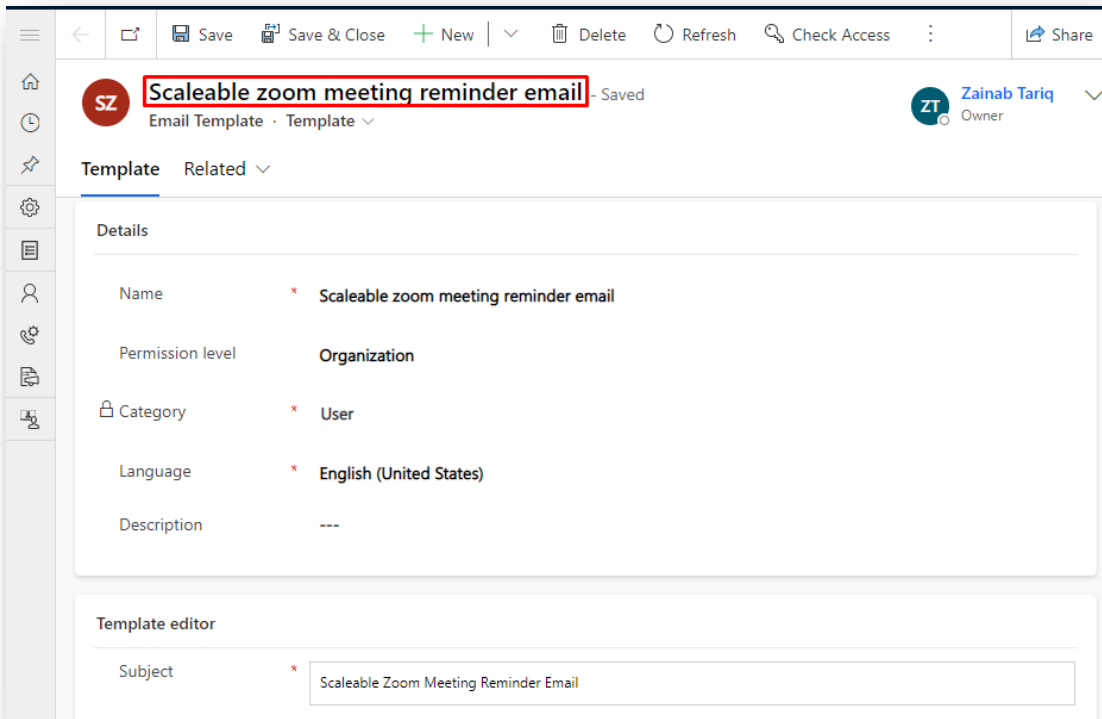
Click on **Scaleable zoom meeting reminder email**.



The screenshot shows the Dynamics 365 interface for Email Templates. The header includes 'Dynamics 365', 'Settings', and 'Templates'. A yellow banner at the top states 'Dynamics 365 for Outlook Deprecated' with a note that users are still using it, which is retired as of Oct. 1, 2020. Below the banner, the 'Email Templates' section is visible, featuring a toolbar with 'New', 'Run Workflow...', 'Start Dialog', and 'More Actions'. A table lists various templates with columns for Title, Template Type, Viewable By, Language, and Reply R. The row for 'Scaleable zoom meeting reminder email' is highlighted with a red border.

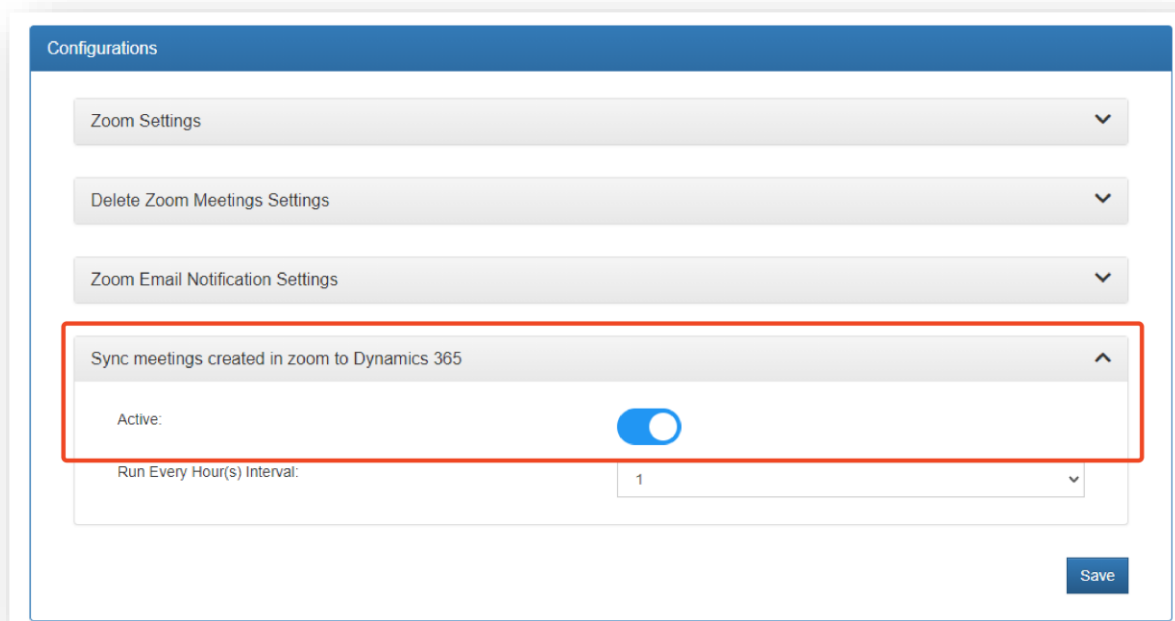
<input type="checkbox"/>	Title ↑	Template Type	Viewable By	Language	Reply R
	Marketing communication unsubscribe acknowl...	Global	Organization	English(1033)	
	Marketing Event Notification	Contact	Organization	English(1033)	
	New Case Acknowledgement	Case	Organization	English(1033)	
	New Opportunity Creation Notification (Internal)	Opportunity	Organization	English(1033)	
	Order Thank You	Order	Organization	English(1033)	
	Scaleable zoom instant meeting invitation email	Global	Organization	English(1033)	
	Scaleable zoom meeting invitation email	Global	Organization	English(1033)	
	Scaleable zoom meeting reminder email	Global	Organization	English(1033)	
	Thank you for registering with us	Contact	Organization	English(1033)	
	Won Opportunity Notification (Internal)	Opportunity	Organization	English(1033)	

Note: If you have selected to send this email in configuration, an email will be sent 10 minutes before the meeting scheduled time.



Sync Zoom meetings to Dynamics 365:

To keep a record of all zoom meetings conducted with your clients, sync the meetings created in Zoom to Dynamics 365. Activate the sync meeting configuration and select time interval of synchronization in hours.



The screenshot shows the 'Configurations' page in Dynamics 365. It features several expandable sections: 'Zoom Settings', 'Delete Zoom Meetings Settings', and 'Zoom Email Notification Settings'. The 'Sync meetings created in zoom to Dynamics 365' section is expanded and highlighted with a red border. Within this section, the 'Active' toggle is turned on, and the 'Run Every Hour(s) Interval' dropdown is set to '1'. A 'Save' button is located at the bottom right of the configuration area.

After completing the configuration click save.

If the Email address of your Dynamics 365 org user is the same as your Zoom user. The user will be synced automatically on saving the configuration. Otherwise, you need to sync the user manually. For this you should have a D365 user having same email address of at least one of the Zoom users.

User Roles:

There are three types of roles here

Scaleable Zoom Admin:

User with "Scaleable Zoom Admin" role will have all permissions of Scaleable Zoom entities.

Scaleable Zoom Read:

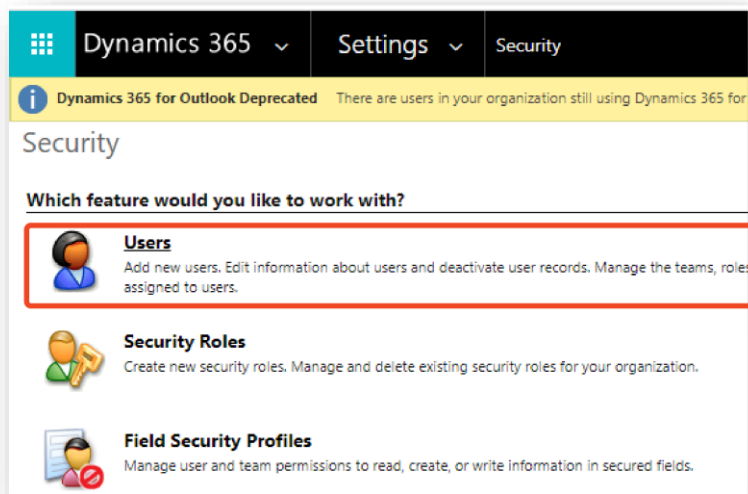
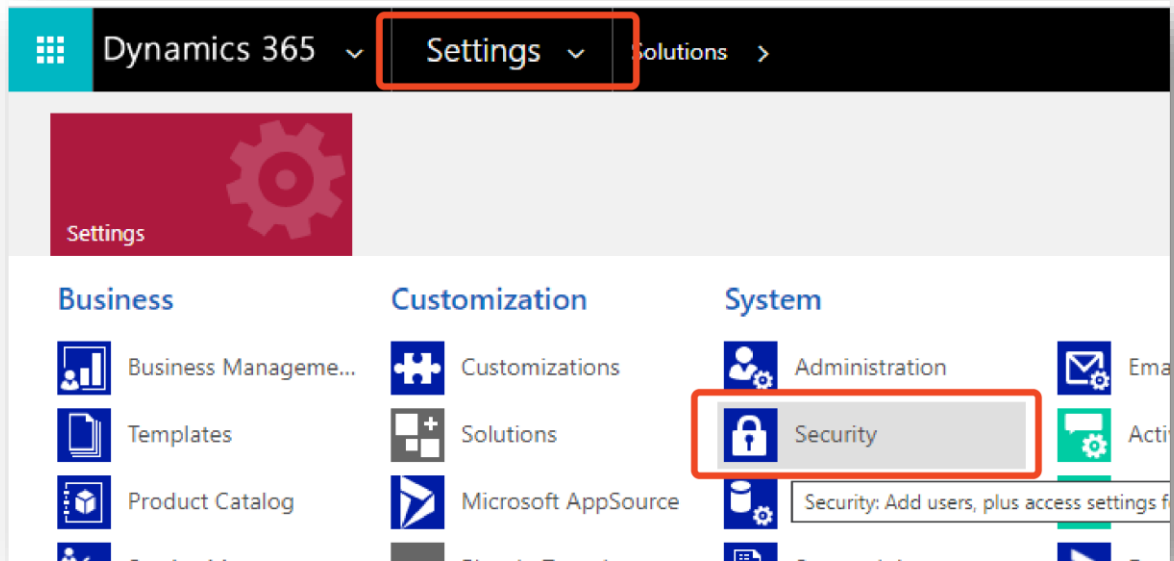
User with "Scaleable Zoom Read" role will only be allowed to read entities of Scaleable Zoom except registration.

Scaleable Zoom Service:

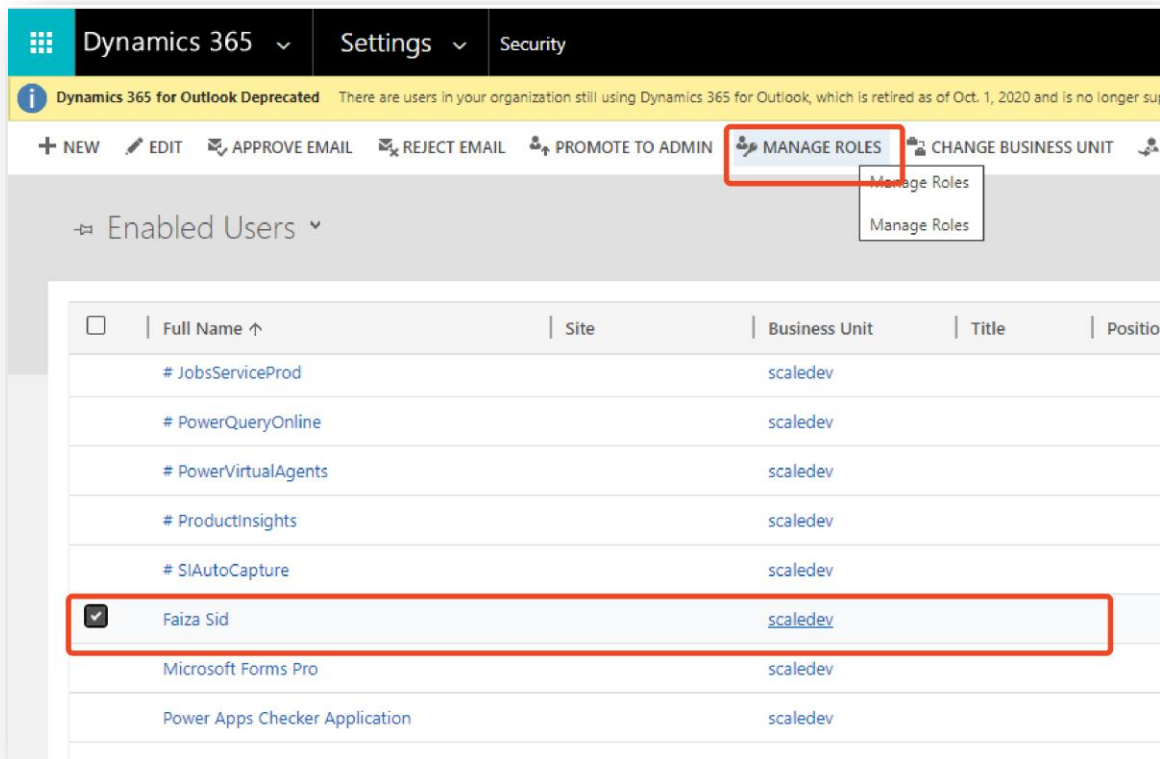
User with "Scaleable Zoom Service" role should be assigned to the user for the connections and configurations. This role will be automatically assigned to the App User when you setup the profile.

Assign Scaleable Zoom Role:

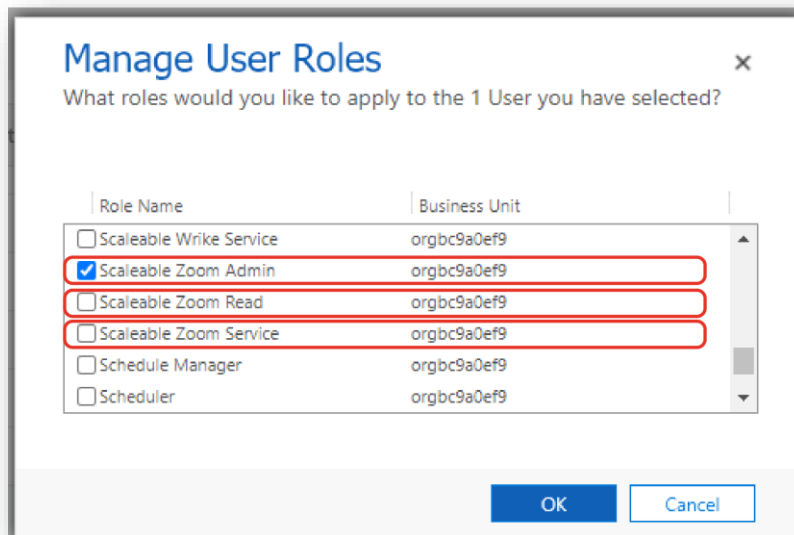
To assign roles to the users go to **Settings > Security > Users**



Select the user to assign role and click **Mange Role**



Assign role to the user

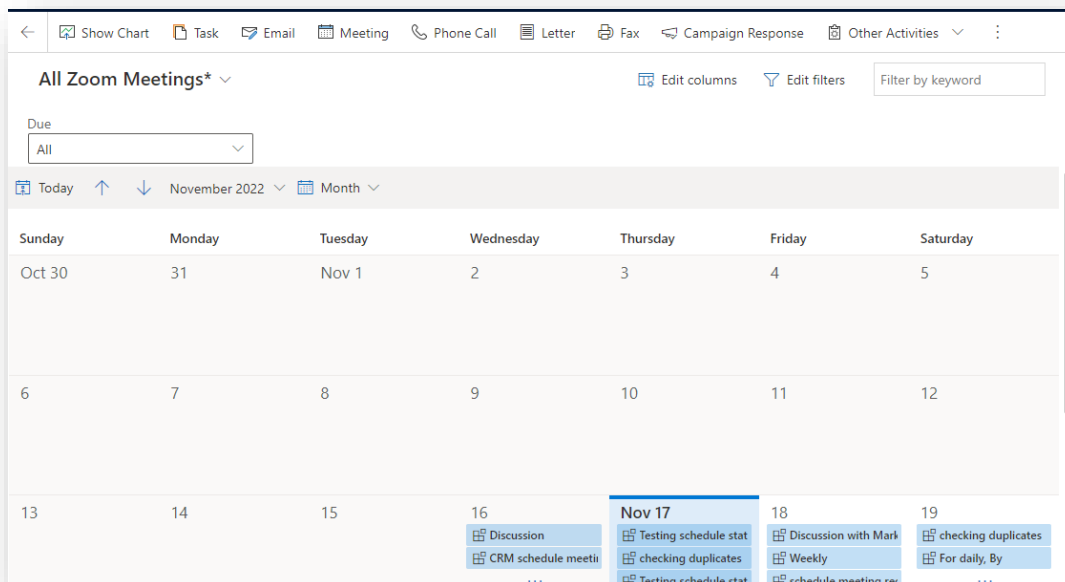
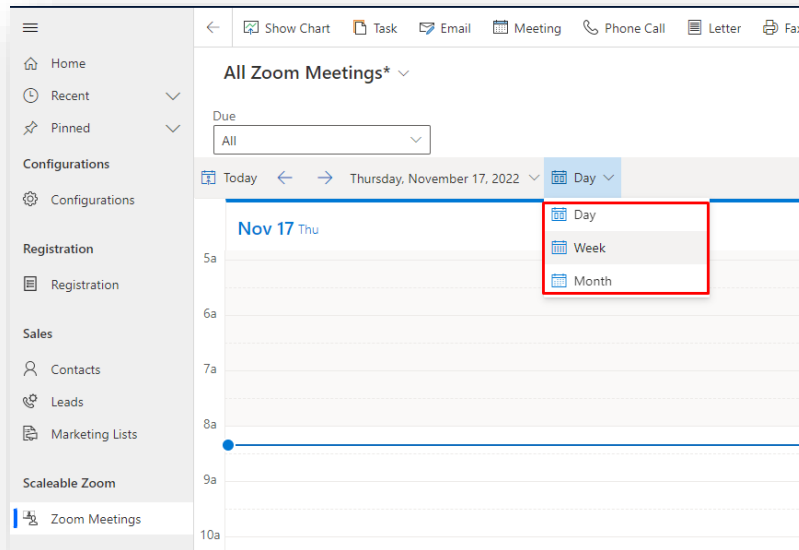


Zoom Meeting Views:

After the Zoom user is synced, you'll be able to Start zoom meeting with your contacts and leads within Dynamics 365. The meeting could be scheduled, or you can start a meeting instantly on the go. You can keep the record of every meeting with your clients in Dynamics 365 for a better customer experience.

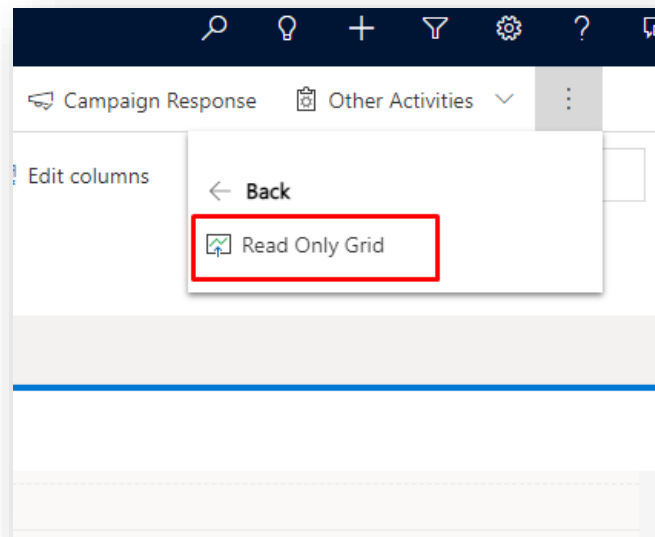
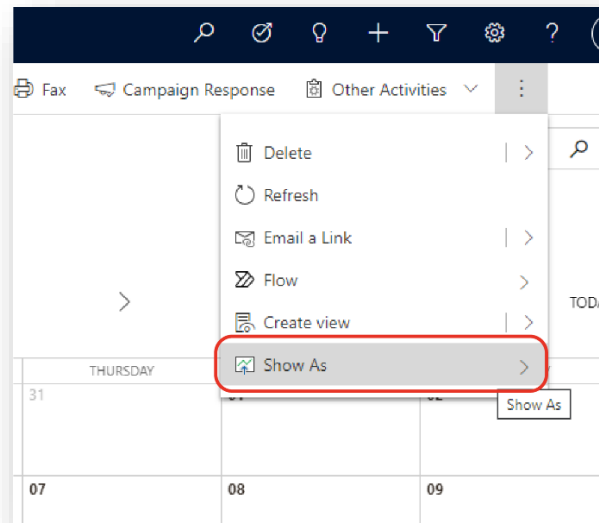
Calendar View:

Click on **Zoom Meetings** from sitemap. You'll have a calendar view of all your scheduled meetings. Calendar view can be changed to daily, weekly, and monthly view.



Grid View:

To view the meetings in grid view, from **Zoom meetings** click on **Show As > Read Only Grid**.



← Show Chart Task Email Meeting Phone Call Letter Fax Campaign Response Other Activities

All Zoom Meetings* Edit columns Edit filters Filter by keyword

Due: All

Subject	Date Created	Actual Duration	Description	Meeting Type	Owner	Start Meeting DateTime
Dynamics	11/16/2022 7:02 AM	1 minute		Schedule	Scaleabl...	2/22/2023 6:00 AM
For daily, After	11/16/2022 7:02 AM	30 minutes	For daily, it shows the...	Schedule	Scaleabl...	11/16/2022 6:00 AM
For daily, After	11/16/2022 7:02 AM	30 minutes	For daily, it shows the...	Schedule	Scaleabl...	11/28/2022 6:00 AM
For daily, After	11/16/2022 7:02 AM	30 minutes	For daily, it shows the...	Schedule	Scaleabl...	11/22/2022 6:00 AM
For daily, After	11/16/2022 7:02 AM	30 minutes	For daily, it shows the...	Schedule	Scaleabl...	12/4/2022 6:00 AM
For daily, By	11/16/2022 7:02 AM	30 minutes	For daily, it shows the...	Schedule	Scaleabl...	11/28/2022 6:00 AM
For daily, By	11/16/2022 7:02 AM	30 minutes	For daily, it shows the...	Schedule	Scaleabl...	11/19/2022 6:00 AM
For monthly, Day of t...	11/16/2022 7:02 AM	15 minutes	For monthly, Day of t...	Schedule	Scaleabl...	2/12/2023 6:00 AM

Meeting Details

Click on any meeting from the calendar.

All Zoom Meetings* Edit columns Edit filters Filter by keyword

Due: All

Last Minute Call

Thursday, November 17, 2022 3:00 PM - 3:15 PM

15 minutes

Required

Alex Baker

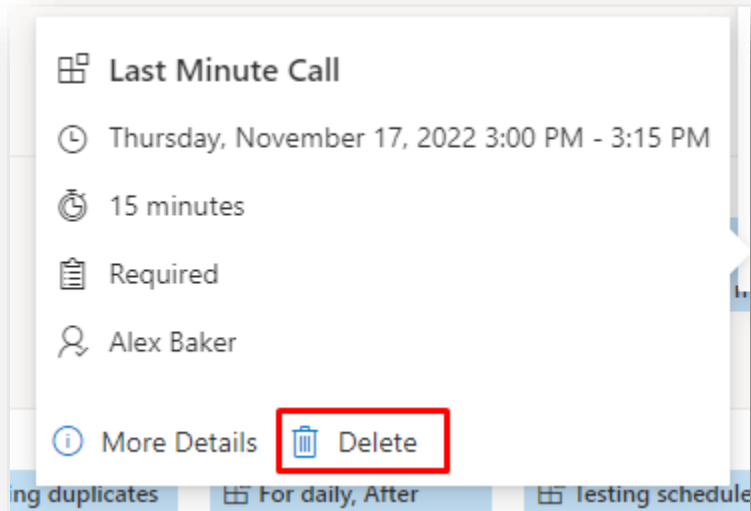
More Details Delete

Thursday, November 17, 2022

- Testing schedule status
- checking duplicates
- Testing schedule status
- Last Minute Call

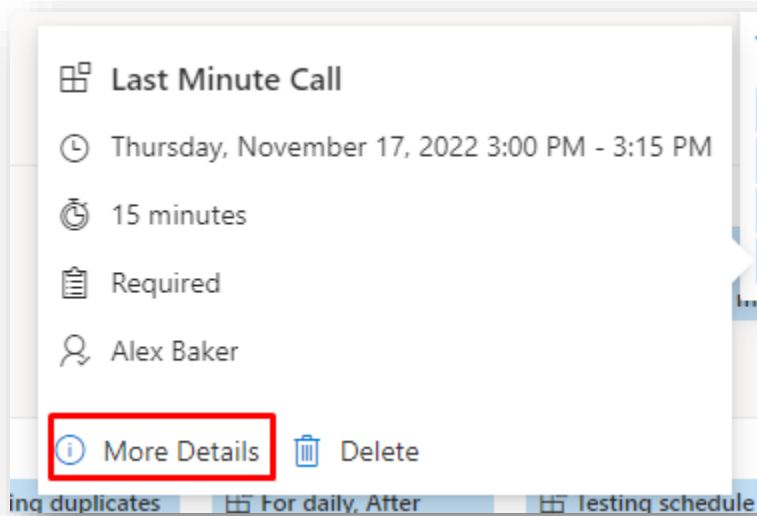
Delete Meetings:

You can delete a meeting directly by clicking on the Delete option available when you click on the meeting from the calendar.



More Details:

You can also view your meeting details by clicking on **More Details** button.



Zoom User:

Note: Make sure that you are using the same dynamics user having zoom account to create meetings otherwise you won't be able to create your meetings.

CONNECT | DELETE | PROCESS | APPROVE EMAIL | REJECT EMAIL

USER
Scaleable Zoom

This record won't be processed by server-side synchronization or the Email Router until its primary email address is verified.
The information provided in this form is viewable by the entire organization.
This user's information is managed by Office 365. To edit this information visit the User Administration page.

User Name * ScaleableZoom@ScaleableSolutions956.onmicrosoft.com

User Information

Full Name * Scaleable Zoom

Title

Primary Email * ScaleableZoom@ScaleableSolutions956.onmicrosoft.com

Mobile Phone

Main Phone 3499709147

Scaleable Zoom

Save Mark Complete Save & Close Flow

You can't create meeting because No Zoom user found on your Email 'ScaleableZoom@ScaleableSolutions956.onmicrosoft.com'

New Zoom Meeting

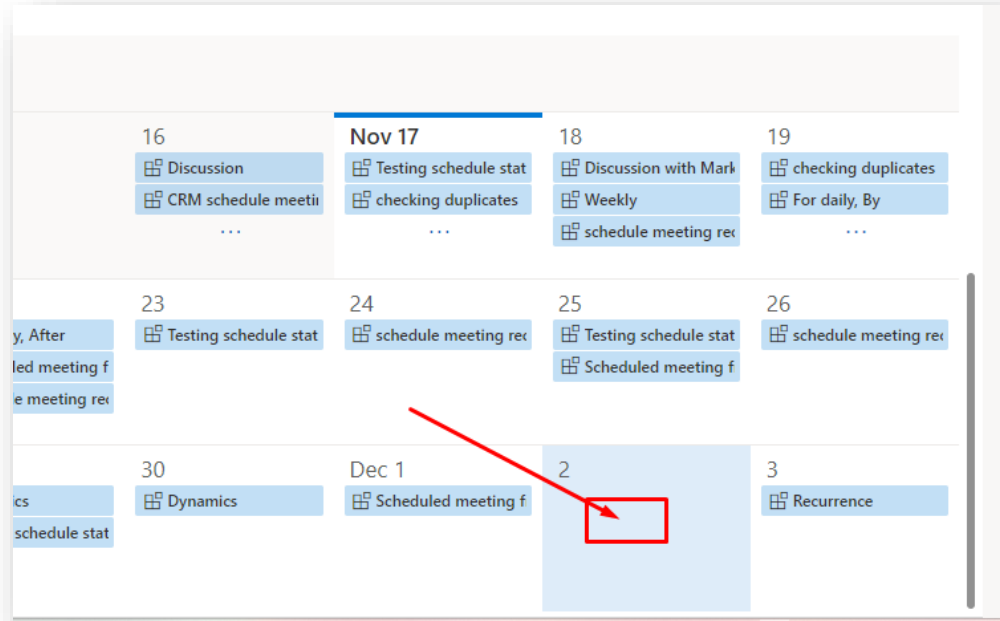
Zoom General Meeting Logs

Topic *	---	Description	---
Meeting Type *	---	Start Meeting DateTime	---
Meeting To	Individual	Time Zone	---
To *	---	Actual Duration *	---
Recurring Meeting	No		

Create Zoom Meetings:

From Calendar:

To create a zoom meeting from Calendar, click on any day from the calendar.



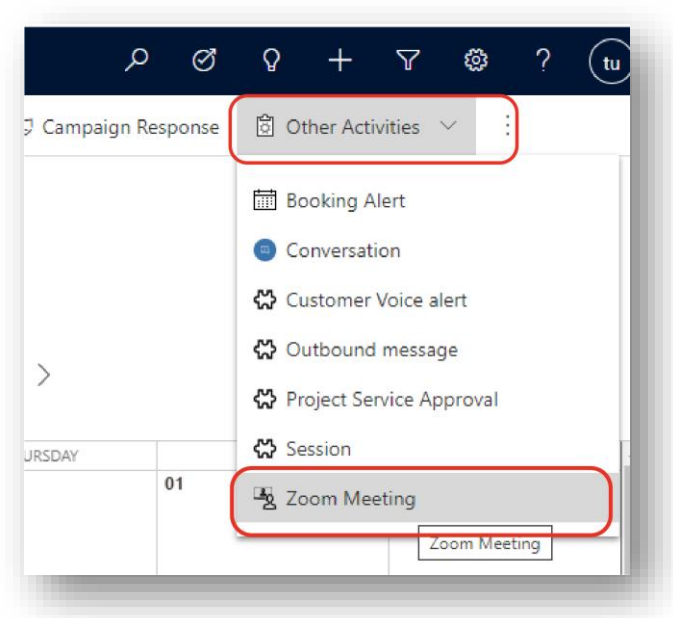
Fill in the information.

The image shows the 'New Zoom Meeting' form in a software application. The form is titled 'New Zoom Meeting - Unsaved' and shows fields for Topic, Meeting Type, MeetingTo, To, Recurring Meeting, Description, Start Meeting DateTime, Time Zone, and Actual Duration. The form is currently empty, with asterisks indicating required fields.

Field	Value
Topic	*
Meeting Type	*
MeetingTo	Individual
To	*
Recurring Meeting	No
Description	---
Start Meeting DateTime	12/2/2022 5:00 AM
Time Zone	---
Actual Duration	* ---

From Toolbar:

To create a zoom meeting from toolbar, click on **Others Activities > Zoom Meeting**



Scheduled Zoom Meetings:

Zoom meeting form will be available. Enter the **Topic** and **Description** of your meeting. For scheduled meeting select "Schedule" in **Meeting Type**. Set the **Start Meeting Date Time**, **Time Zone**, and **Duration of meeting**. To select the contacts/leads individually select "Individual" in **Meeting To**. You can also select "Group" to schedule a meeting with your Marketing List.

Note: Make sure to create a marketing list before creating a meeting with marketing list.

Recurring Meetings:

You can also create recurring meetings by selecting **Recurring meeting** "Yes". After that the recurring details information section will be visible. Fill in the recurring information.

New Zoom Meeting - Unsaved

Normal Priority | Open Activity Status | ZT Zainab Tariq Owner

Zoom | General | Meeting Logs

Topic	* Discussion with Marketing Team	Description	Discussion with Marketing Team
Meeting Type	* Schedule	Start Meeting DateTime	11/18/2022 5:00 AM
MeetingTo	Individual	Time Zone	* (GMT-7:00) Pacific Time (US and Canada)
To	* Alex Baker +2	Actual Duration	* 15 minutes
Recurring Meeting	Yes		
Recurrence	---	End Date	---
Repeat Every Day	---		
occurrence	---		

Daily:

You can create your daily recurring meetings. For this, Select “Daily” in **Recurrence** field. Select any value for **Repeat Every Day** (this will allow you to create meetings after the specified days). Select any option from the list in the **End Date** field. You have two options for **End Date**.

“By” option will allow you to add the **By Occurrences** date so that your meetings will be created until that date.

New Zoom Meeting - Unsaved

Normal Priority | Open Activity Status | ZT Zainab Tariq Owner

Zoom | General | Meeting Logs

MeetingTo	Individual	Time Zone	* (GMT-7:00) Pacific Time (US and Canada)
To	* Alex Baker +2	Actual Duration	* 15 minutes
Recurring Meeting	Yes		
Recurrence	Daily	End Date	* By
Repeat Every Day	* 2	By Occurrences	* 11/30/2022 8:00 AM
occurrence	Every 2 days until November 30, 2022, 7 occur...		

“After” will allow you to add the number of total occurrences you want.

The screenshot shows the 'New Zoom Meeting' form with the following settings:

- MeetingTo: Individual
- To: Alex Baker (+2)
- Recurring Meeting: Yes
- Recurrence: Daily
- Repeat Every Day: 2
- End Date: After
- After Occurrences: 4
- occurrence: Every 2 days 4 occurrence(s)

Weekly:

You can create your weekly recurring meetings. For this, Select “Weekly” in **Recurrence** field. Select any value for **Repeat Every Week** (this will allow you to create meetings after the specified weeks). Select the meeting days from the **Occurs on** field. Select any option from the dropdown in the **End Date** field. Populate the **By Occurrences** or **After Occurrences** field.

The screenshot shows the 'New Zoom Meeting' form with the following settings:

- MeetingTo: Individual
- To: Alex Baker (+1)
- Recurring Meeting: Yes
- Recurrence: Weekly
- Repeat Every Week: 2
- Occurs on: Sunday, Monday
- End Date: By
- By Occurrences: 11/30/2022
- occurrence: Every 2 weeks on Sun, Mon, until November 3...

Monthly:

You can create your monthly recurring meetings. For this, Select “Monthly” in **Recurrence** field. Select any value for **Repeat Every Month** (this will allow you to create meetings after the specified months). Populate the **Occurs Type** field. “Day of the week” in **Occurs Type** will allow you to select any day from the month. Select any option from the dropdown in the **End Date** field. Populate the **By Occurrences** or **After Occurrences** field depending upon your selection in the End Date field.

The screenshot shows the 'New Zoom Meeting' form with the following recurrence settings highlighted in red boxes:

- Recurrence:** Monthly
- Repeat Every Month:** 2
- Occurs Type:** Day of the month
- Day:** 4
- End Date:** By
- By Occurrences:** 11/30/2022

Other visible fields include: Meeting to: Individual, Time Zone: (GMT-7:00) Pacific Time (US and Canada), Actual Duration: 15 minutes, and Recurring Meeting: Yes.

“Week of the month” will allow you to select the **Week** and **Day** of the months. Selecting “Second” in **Week** and “Monday” in **Day** will allow you to create meetings on the second Monday of the months.

The screenshot shows the 'New Zoom Meeting' form with the following recurrence settings highlighted in red boxes:

- Recurrence:** Monthly
- Repeat Every Month:** 2
- Occurs Type:** Week of the month
- Week:** Second
- Day:** Monday
- End Date:** By
- By Occurrences:** 11/30/2022

Other visible fields include: Recurring Meeting: Yes.

Non-Recurring Meetings:

For non-recurring meetings, select “No” in **Recurring meeting** field.

Click **save**.

The screenshot shows the 'New Zoom Meeting' form in a CRM system. The form is titled 'New Zoom Meeting - Unsaved' and has tabs for 'Zoom', 'General', and 'Meeting Logs'. The 'Zoom' tab is active. The form fields are: Topic (Discussion), Meeting Type (Schedule), Meeting To (Individual), To (Cacilia Viera), Start Meeting DateTime (10/28/2022 12:00 AM), Time Zone ((GMT-7:00) Pacific Time (US and Canada)), and Actual Duration (30 minutes). The 'Recurring Meeting' field is set to 'No'. The 'Zoom Meetings' option in the left sidebar is highlighted with a red box.

After creating the meeting, the **Activity Status** of the meeting will be changed to “Scheduled”.

The screenshot shows the meeting details view in a CRM system. The meeting is titled 'Discussion with Marketing Team'. The 'Activity Status' is 'Scheduled'. The meeting details are: Description (Discussion with Marketing Team), Start Meeting DateTime (11/28/2022 6:00 AM), Time Zone ((GMT-7:00) Pacific Time (US and Canada)), and Actual Duration (15 minutes). The 'Scheduled' status is highlighted with a red box.

Meeting URL and ID:

You can join the meeting by clicking on the icon next the **Meeting URL** or by using the **Meeting Id**.

The screenshot shows the Dynamics 365 interface for a meeting titled "Testing schedule status". The meeting is a Zoom Meeting with a status of "Open" and a priority of "Normal". The owner is "Scaleable Scaleable Solutions". The meeting is scheduled for 11/17/2022 at 6:00 AM in the "(GMT-7:00) Pacific Time (US and Canada)" time zone. The meeting is an individual meeting with a duration of 15 minutes. The meeting is recurring daily every 2 days until November 30, 2022. The meeting URL is "https://us05web.zoom.us/j/89520278523..." and the meeting ID is "89520278523".

Field	Value
Meeting URL	https://us05web.zoom.us/j/89520278523...
Meeting Id	89520278523

Meeting logs:

If you have enabled the invitation emails in configuration, an invitation email will be sent to your recipients as soon as the meeting is scheduled. To view the emails, click on Meeting Logs. You'll be able to see the reminder emails in the Meeting logs 10 minutes before the meeting scheduled time.

The screenshot shows the Dynamics 365 interface for a meeting titled "Demo meeting". The meeting is a Zoom Meeting with a status of "Open" and a priority of "Normal". The due date is 1/21/2021 7:30 AM and the owner is "test user". The meeting is scheduled for 1/20/2021 12:45... The meeting logs show a list of invitation emails. The first entry is "Invitation Email CRM:0035053" from "test user" to "Abraham McCor..." with a status of "Pending S..." and a modified on date of 1/20/2021 12:45...

Subject	From	To	Regarding	Priority	Status	Reason	Modified On
Invitation Email CRM:0035053	test user	Abraham McCor...	---	Normal	Pending S...		1/20/2021 12:45...

Instant Meetings:

You can select Meeting Type “Instant” to start a meeting instantly.

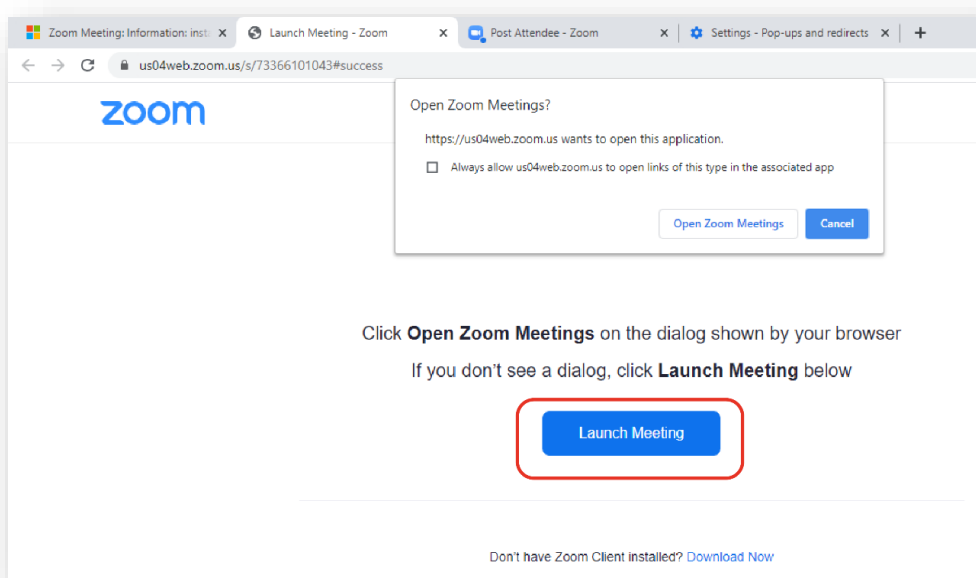
The screenshot shows the Zoom Meeting configuration interface. At the top, it says "instant - Saved" and "Zoom Meeting". On the right, there are tabs for "Normal Priority" and "Open Activity Status", and a user profile for "Zoom Admin Owner". Below this are tabs for "Zoom", "General", "Meeting Logs", and "Related". The main configuration area has the following fields:

Topic	* Discussion	Description	instant
Meeting Type	* Instant	Actual Duration	* 15 minutes
Meeting To	Individual		
To	* Alex Baker		

Below the main configuration area, there are two rows of information:

Meeting URL	https://us05web.zoom.us/j/86151029474?...	Meeting Id	86151029474
-------------	---	------------	-------------

Save the record to start meeting. Meeting will Pop-up in new tab, enabling you to launch your meeting. Instant meeting could be group meeting or individual meeting.

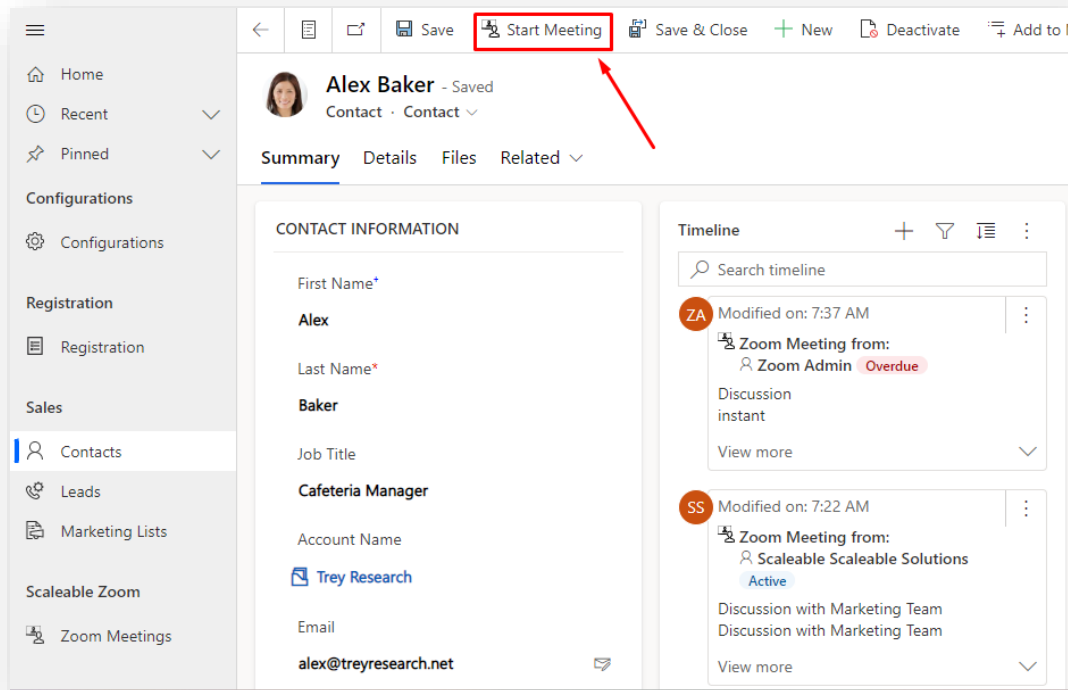


Note: Make sure the browser is not blocking for Pop-ups.

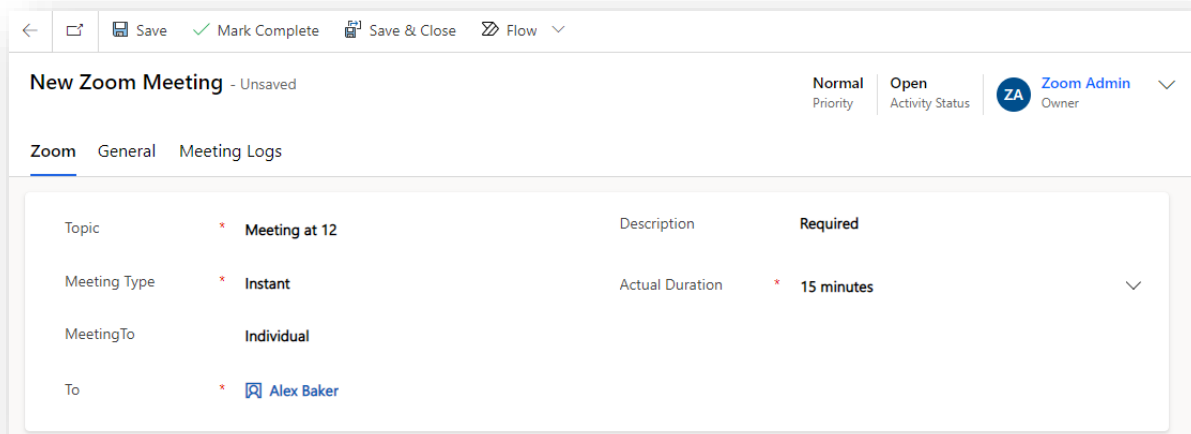
Meetings from Contacts/Leads/Marketing Lists:

Single Contact/Lead:

You can also start an instant meeting directly with your contact or lead with one click. Open the contacts record, click on Start Meeting button.



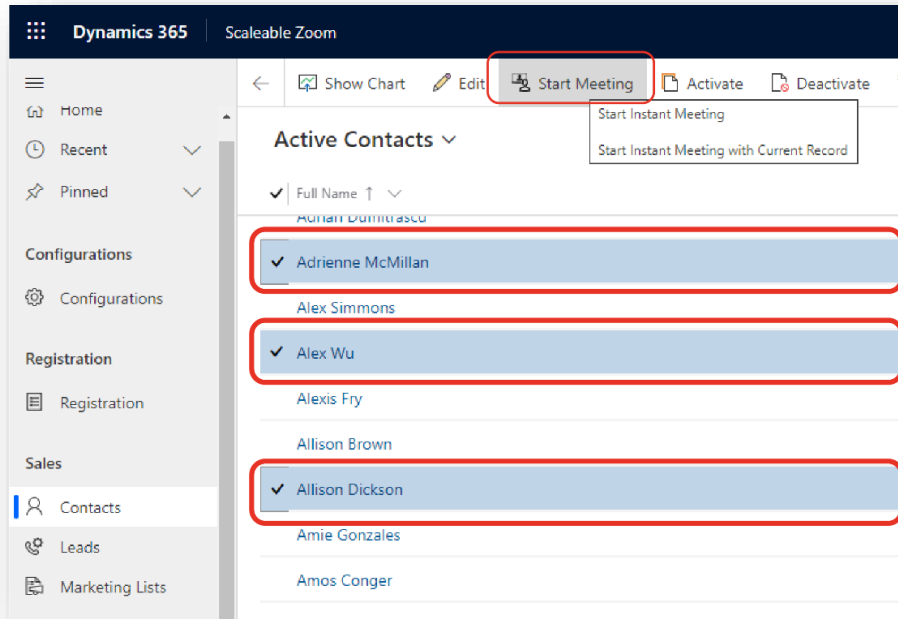
Fill in the meeting information and click **save**.



Multiple Contacts/Leads:

Meeting can be created from grid view.

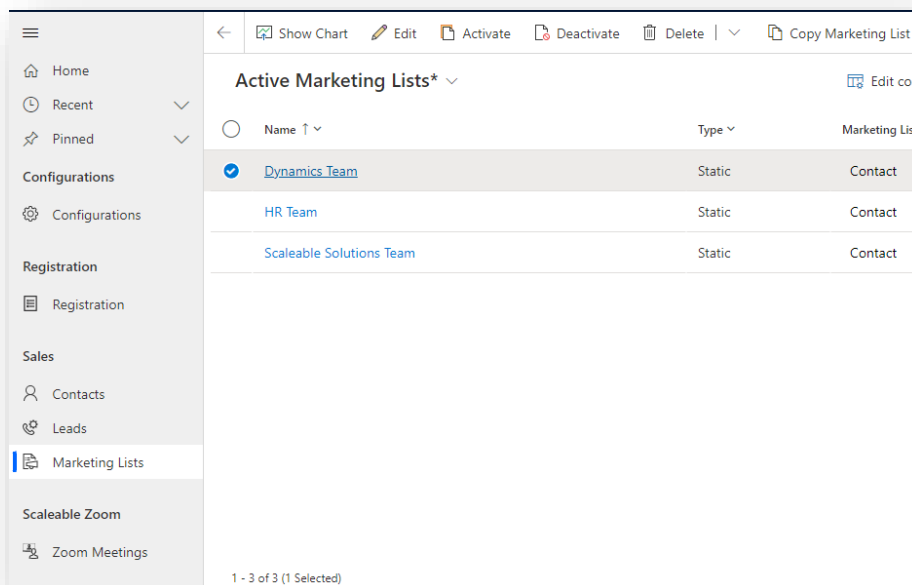
Select your contacts from the grid view and click Start Meeting.



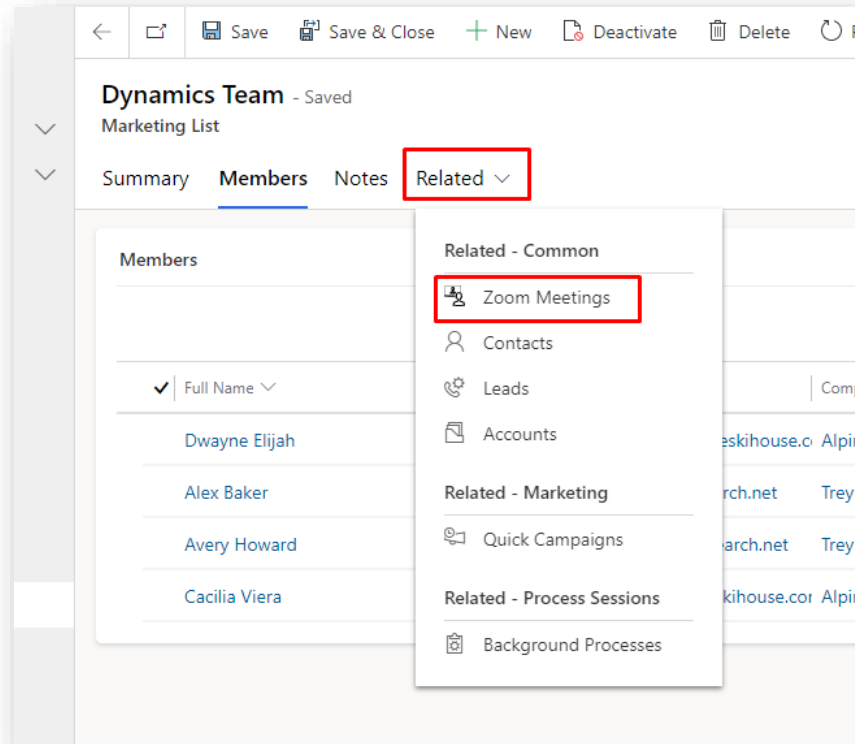
Marketing List:

You can start an instant or schedule meeting directly with your marketing list with one click.

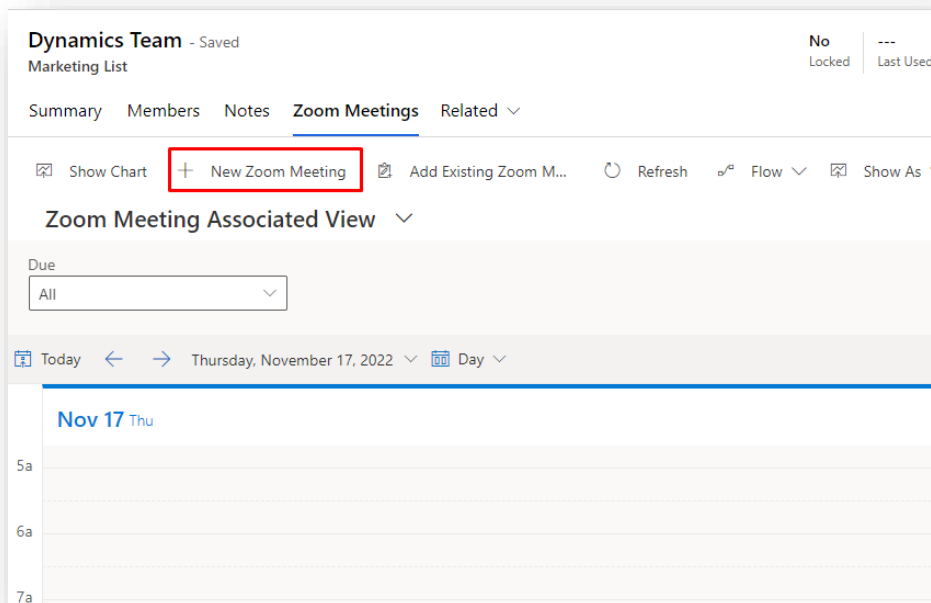
Open the marketing list.



Click on **Related > Zoom Meetings**.



Click on **+ New Zoom Meeting**.



Fill the form and click on **save**.

← Save ✓ Mark Complete Save & Close Flow

New Zoom Meeting - Unsaved Normal Priority Open Activity Status Zoom Admin Owner

Zoom General Meeting Logs

Topic *	New Year Celebration	Description	Discuss the new year celebration event
Meeting Type *	Instant	Actual Duration *	15 minutes
MeetingTo	Group		
Marketing List *	Dynamics Team		

Unsubscribe:

Before uninstalling the solution Unsubscribe **Scaleable Zoom** first. Your Card will be charged automatically on the expiry date unless you have unsubscribed.

From Registration, click **Unsubscribe**

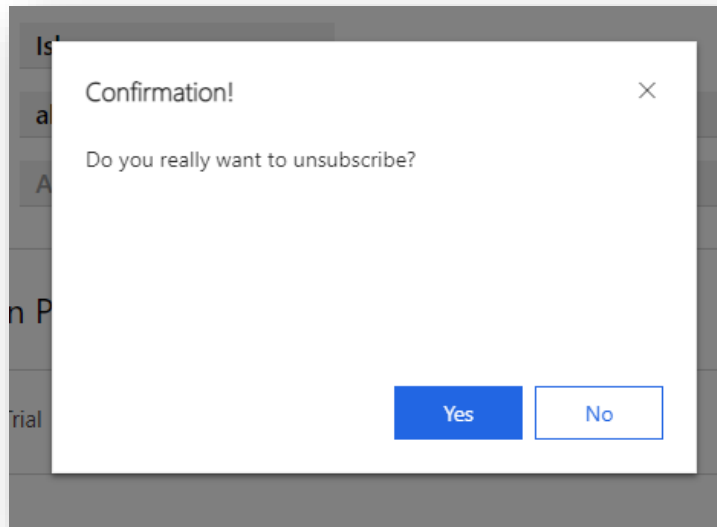
Edit

First Name *	Jane	Last Name *	Snow
Company *	Scaleable Solutions	Phone *	02134567890
Email *	jane@scaleablesolutions	Alternative Email	Alternative Email
Country *	United States of America	State/Province *	Miami
City *	Florida	Postal Code *	009988
Address1 *	House 12		
Address2	Address		

I agree with [Terms and Conditions](#)

Paynow **Unsubscribe**

Confirm your choice.



Uninstall:

If you wish to uninstall Scaleable Zoom, go to **Solutions**. Select Scaleable Zoom and click on **Delete**.

