Scaleable Zoom

SCALEABLE ZOOM - A MICROSOFT DYNAMICS 365 SOLUTION

BY

Scaleable SOLUTIONS

DISCLAIMER

This document is presented with explicit understanding that all contents of this document are confidential and shall not be divulged to any third party without prior written consent of Scaleable Solutions Pvt. Ltd.
All services are provided according to our terms and conditions.

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.

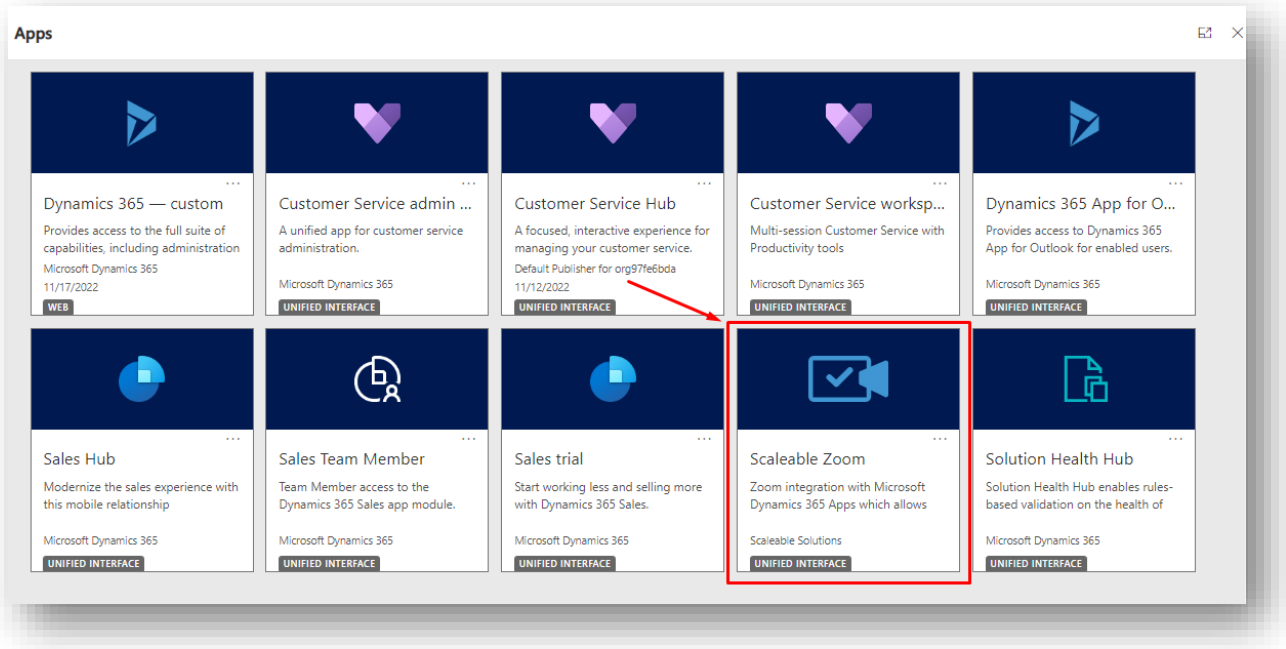
Download Scaleable Zoom:

Please follow the following steps to start using Scaleable Zoom

Download Scaleable Zoom from [Microsoft AppSource]

Dynamics 365 Apps

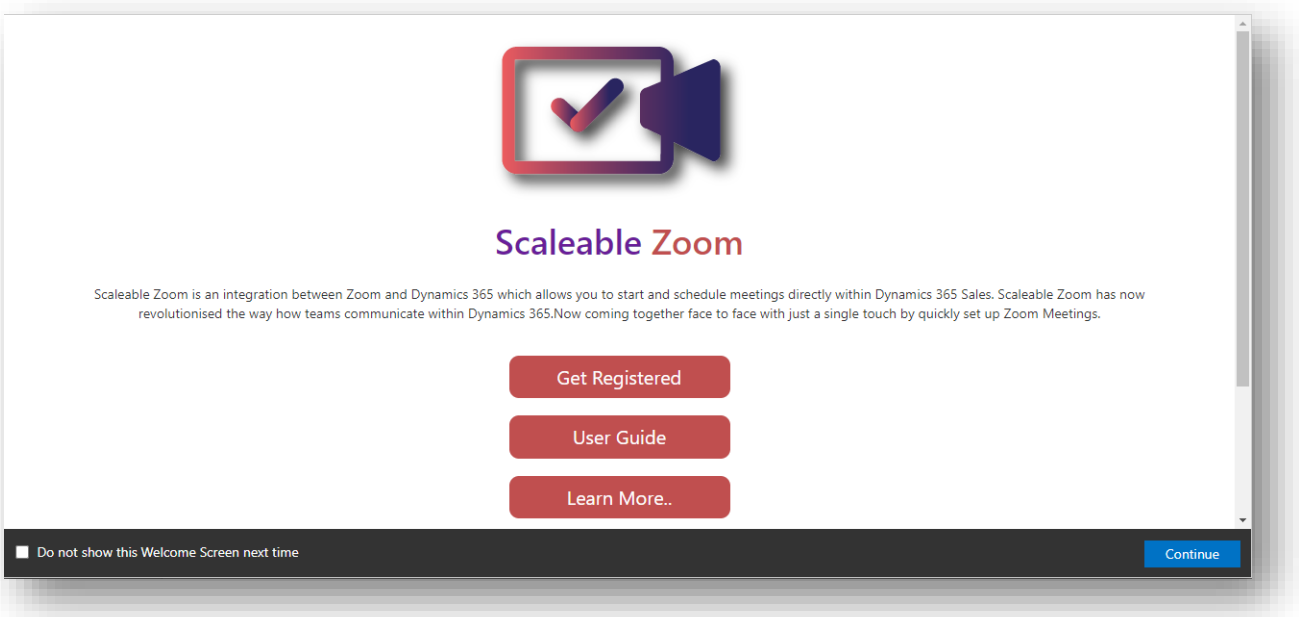
On Dynamics 365 apps you will find the Scaleable Zoom Application.



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.

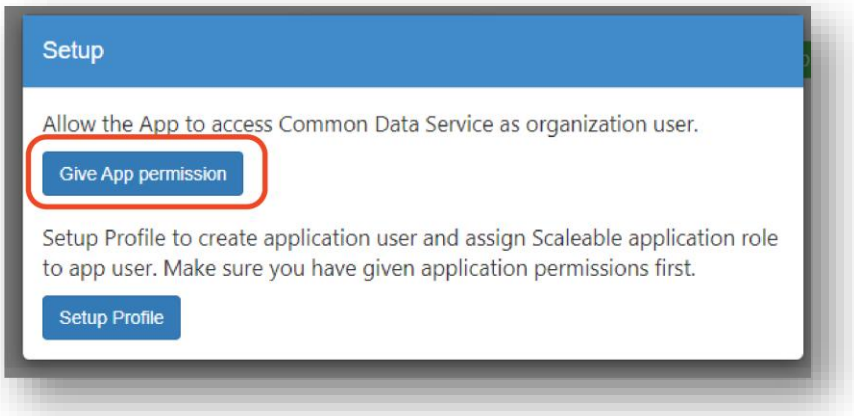


Registration

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

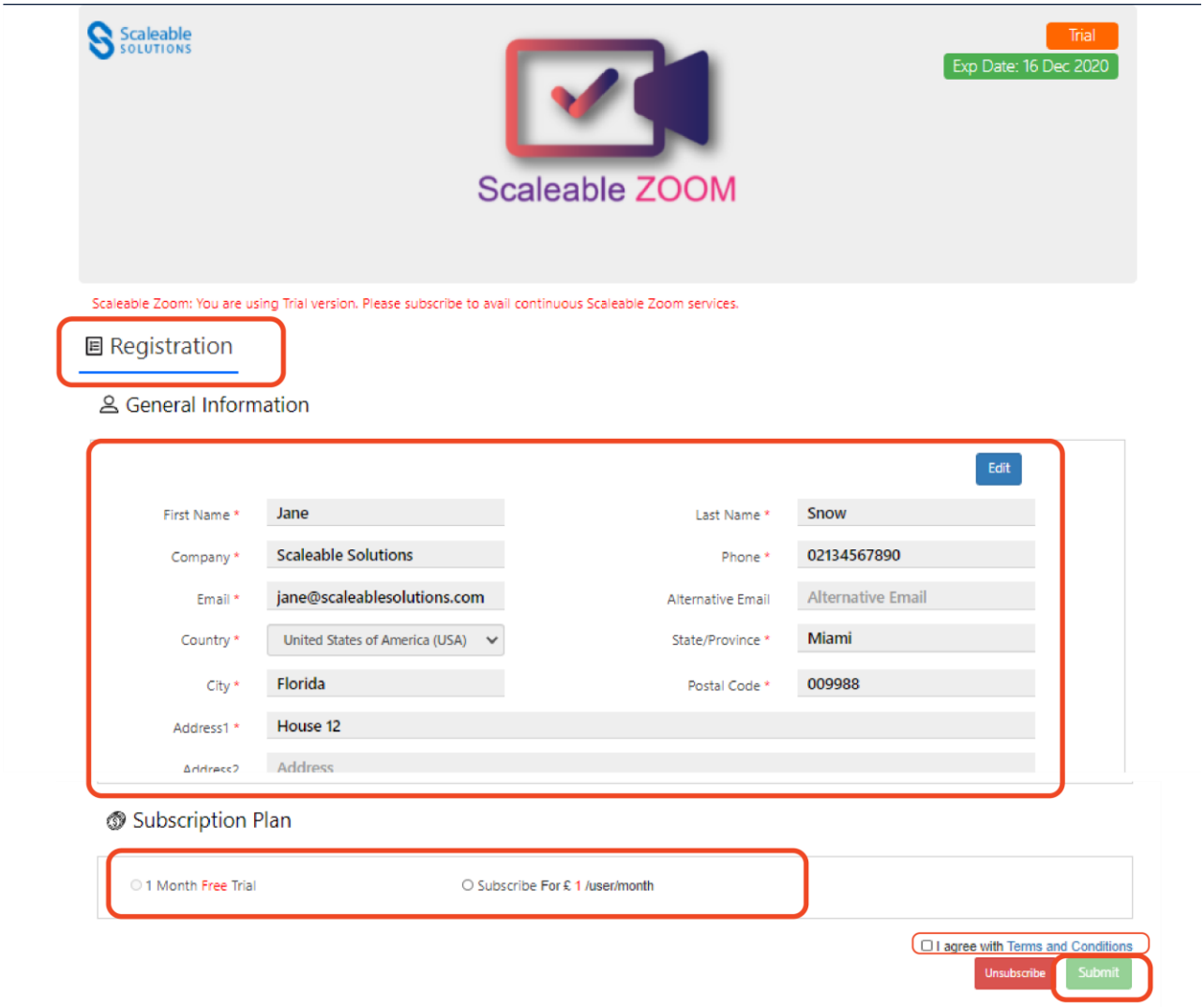
Setup:

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.

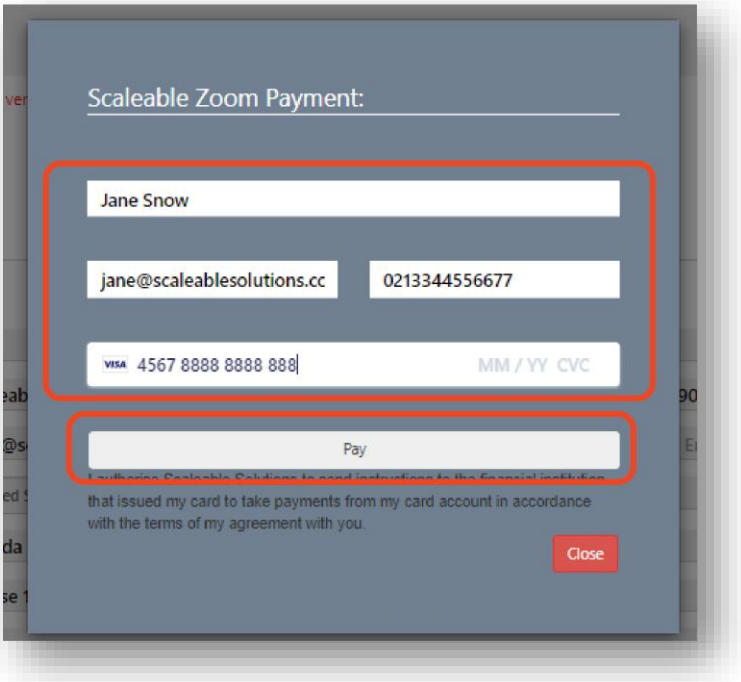


Payment:

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**.



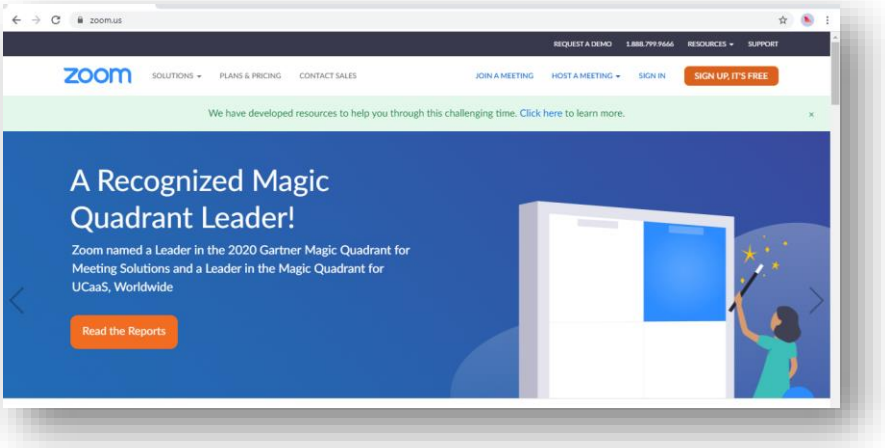
Configuration

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

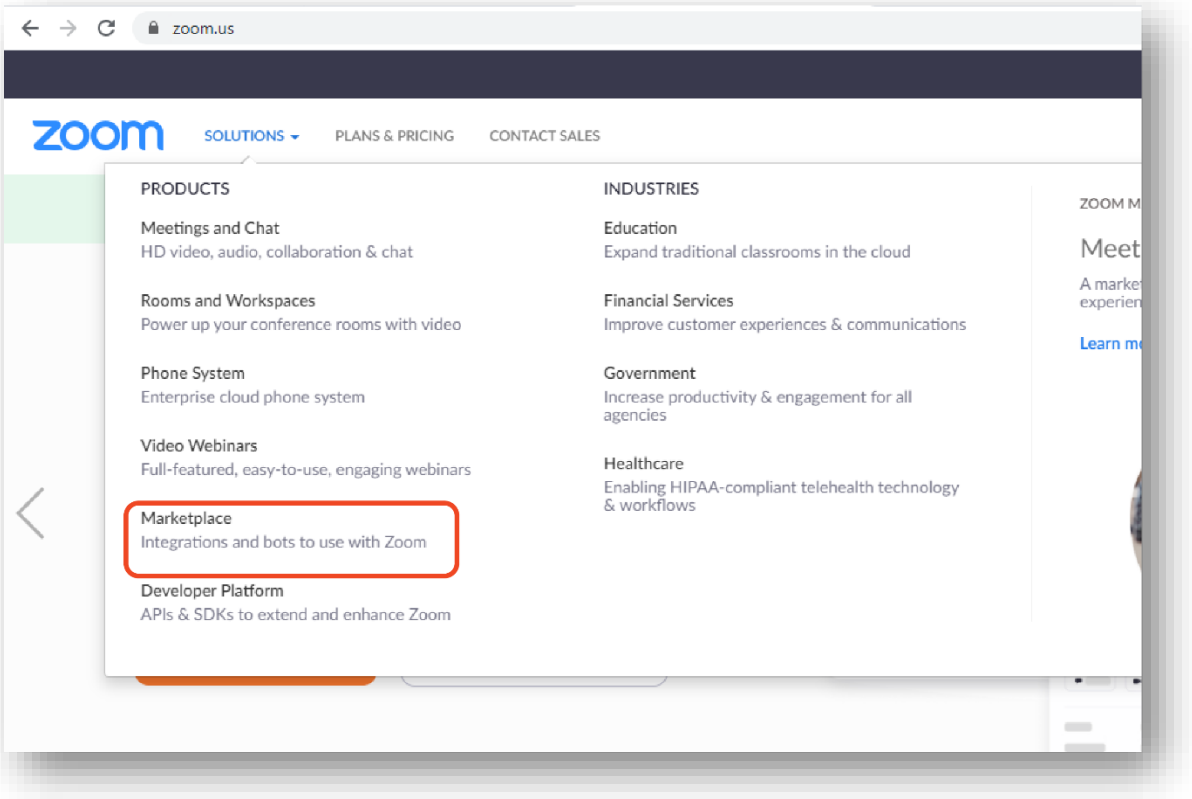
JWT App:

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

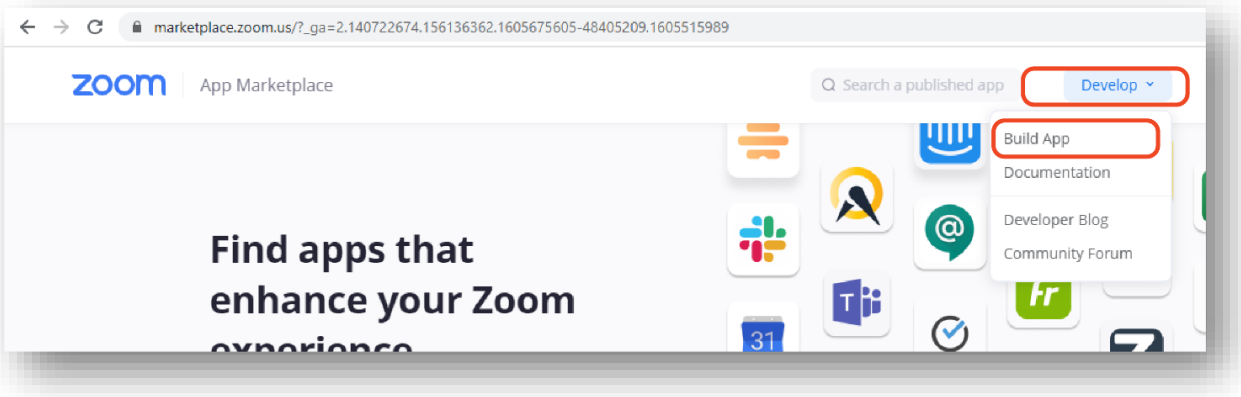
Login to your zoon account. If you don't have an account on zoom [create one](#).



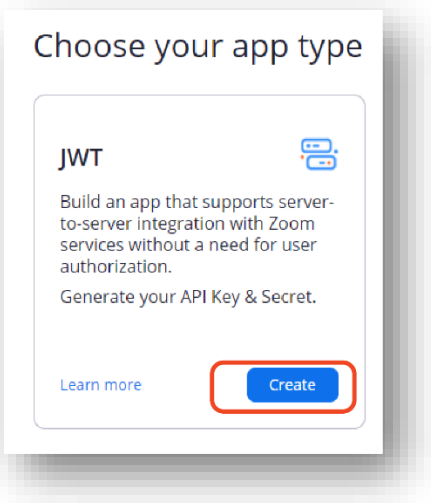
From your zoom account, go to app Marketplace



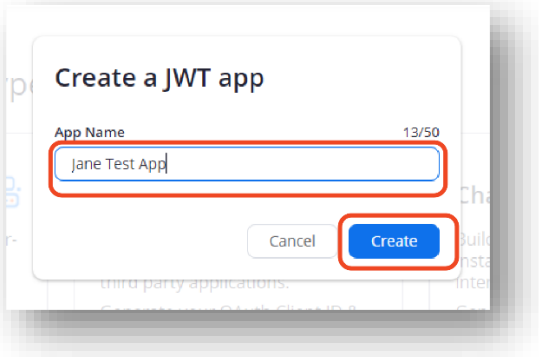
From the **Develop** Dropdown, select **Build App**



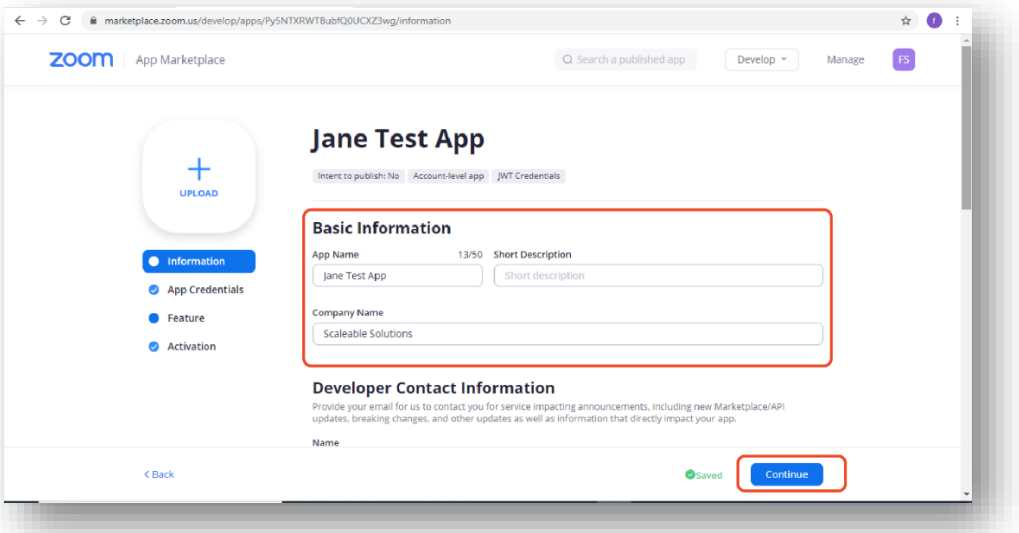
Create a JWT app.



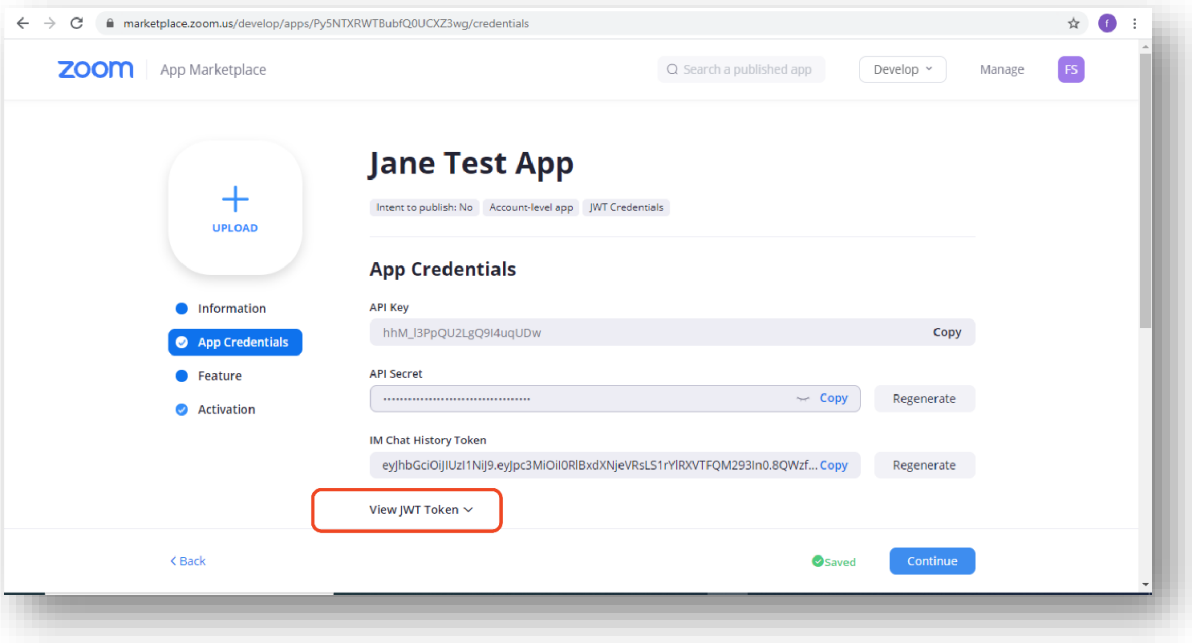
Name your app and click create



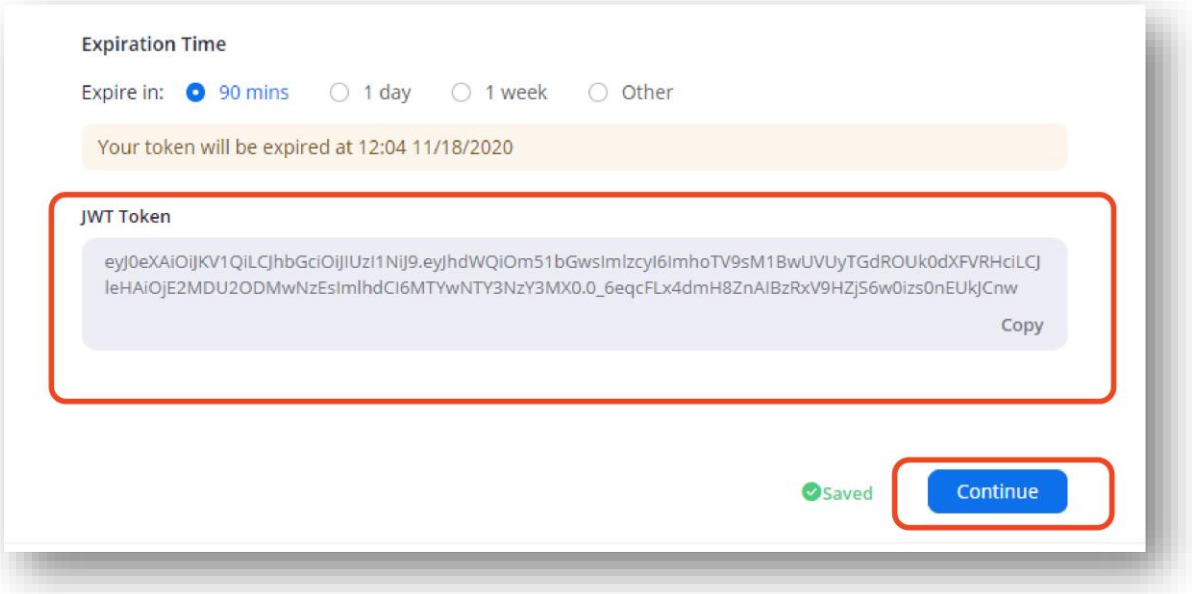
Fill in the form and click Continue.



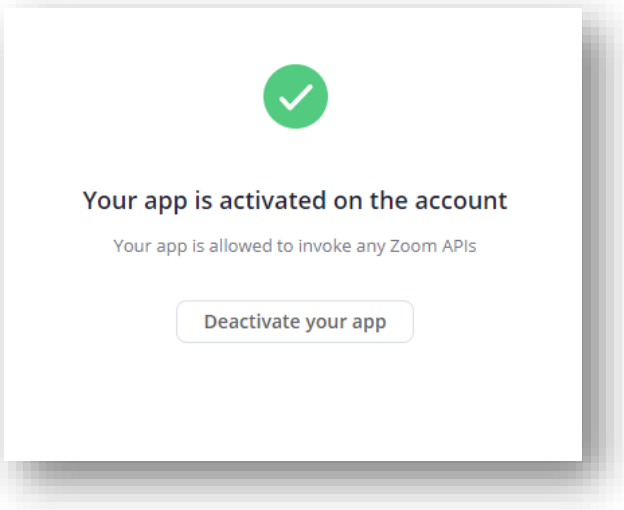
Your JWT app will be created, click to view JWT token.



Copy your JWT token, and click continue to activate your app.



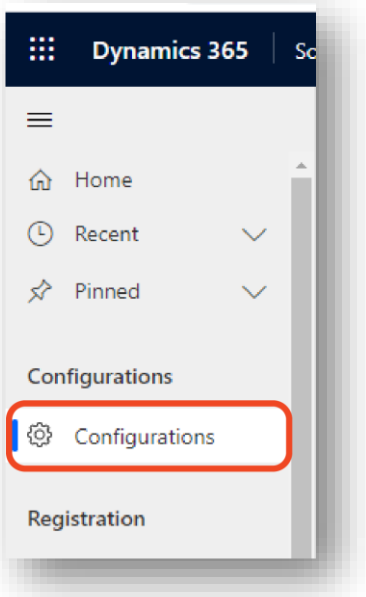
Your app will be activated.



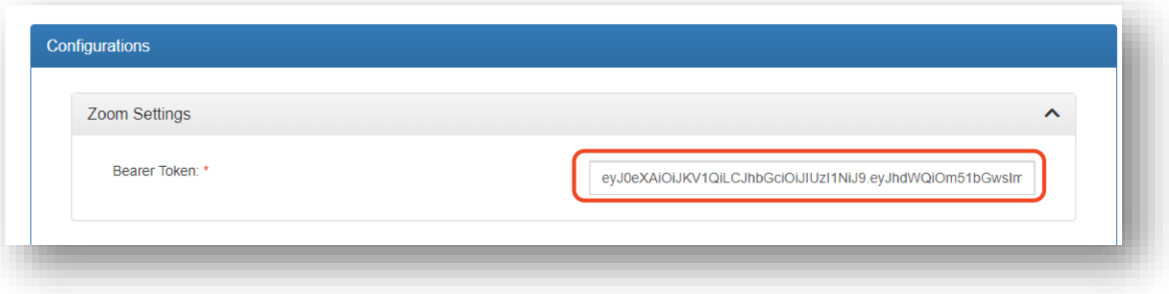
Bearer Token:

Click on **Configuration** from site map.

Note: Make sure to Register before configuring.



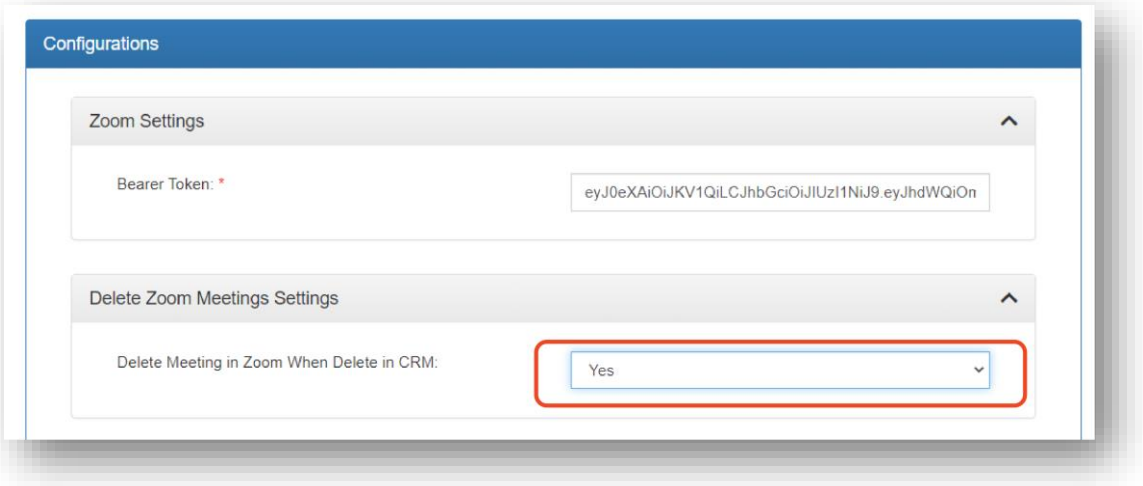
Paste the JWT token in Bearer Token of Zoom Settings.



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:

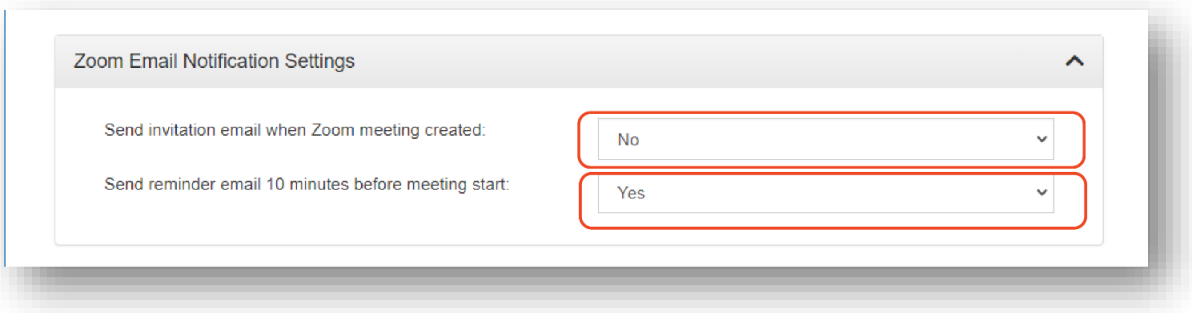
Scaleable zoom allow you to delete the zoom meeting automatically when the meeting is deleted from Dynamics 365. Set the value "Yes" to enable automatic deletion.



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.

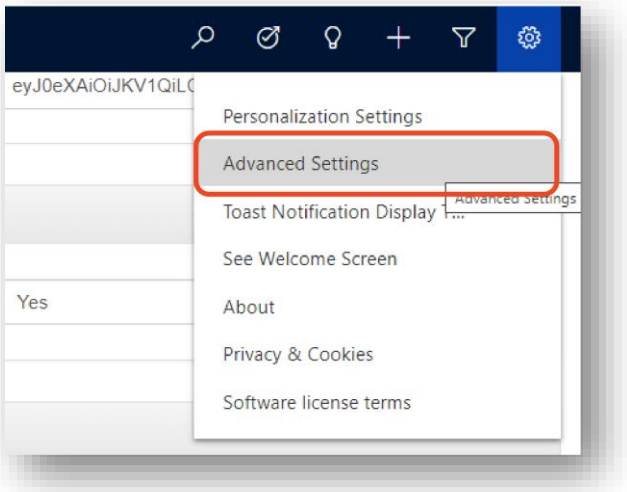
Set **Send reminder email 10 minutes before meeting start** "Yes" to send a reminder email to your recipients.



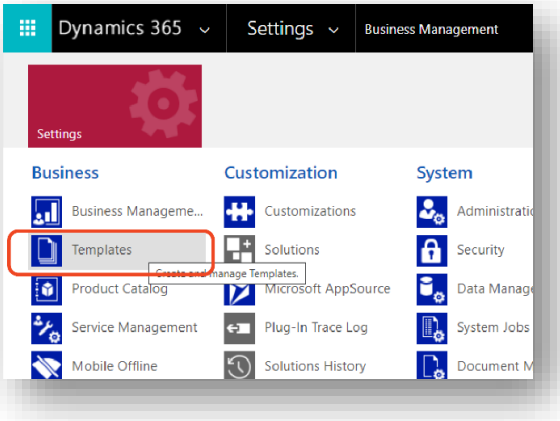
Note: You can find the email templates of the invitation and reminder email.

Email Templates:

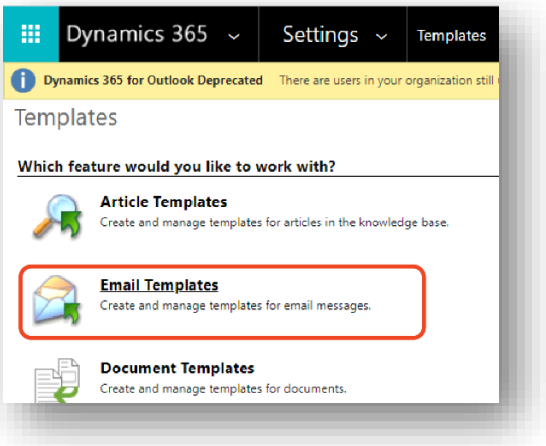
To change or review the template, go to the **Advanced Settings**

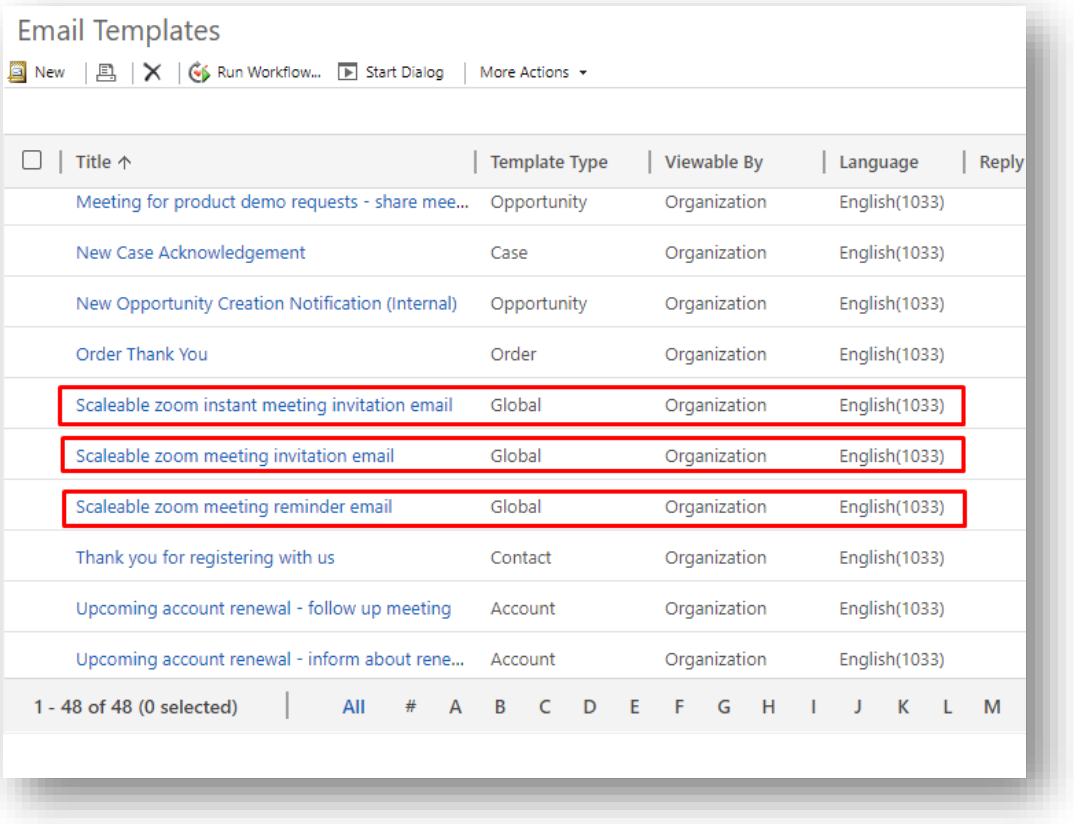


Select **Templates**



Select email templates



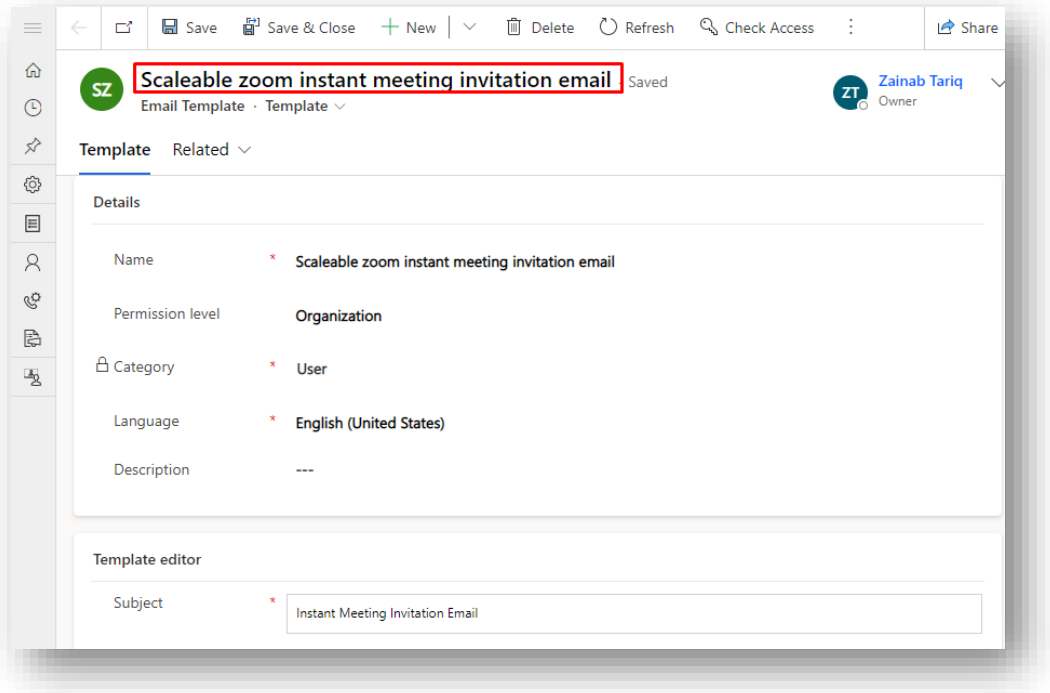


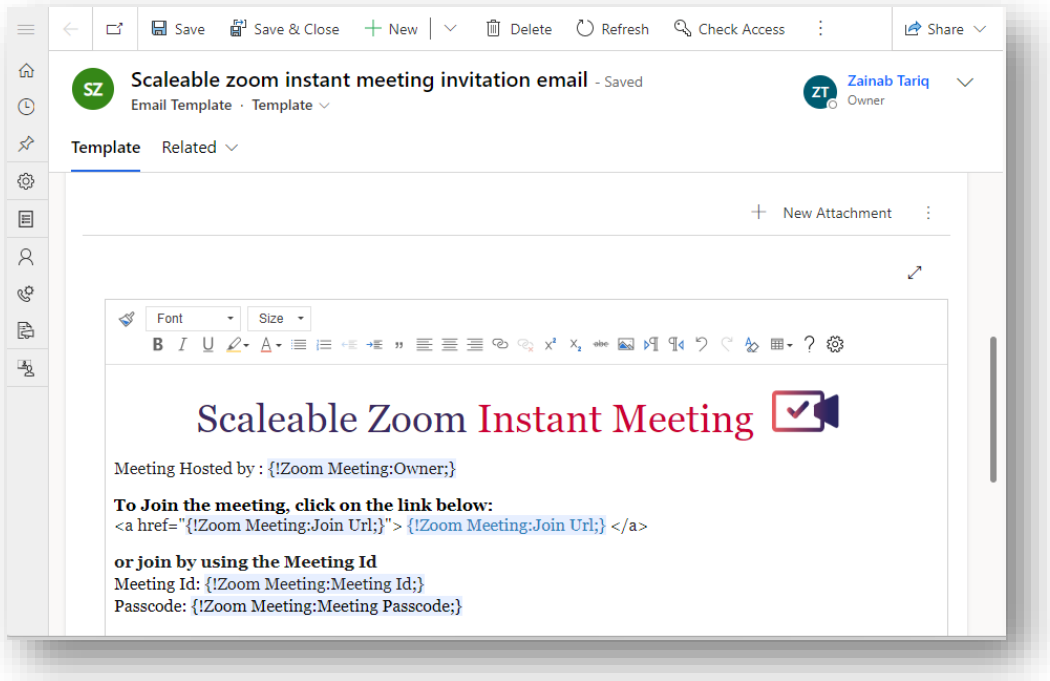
Scaleable zoom email templates are available.

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.

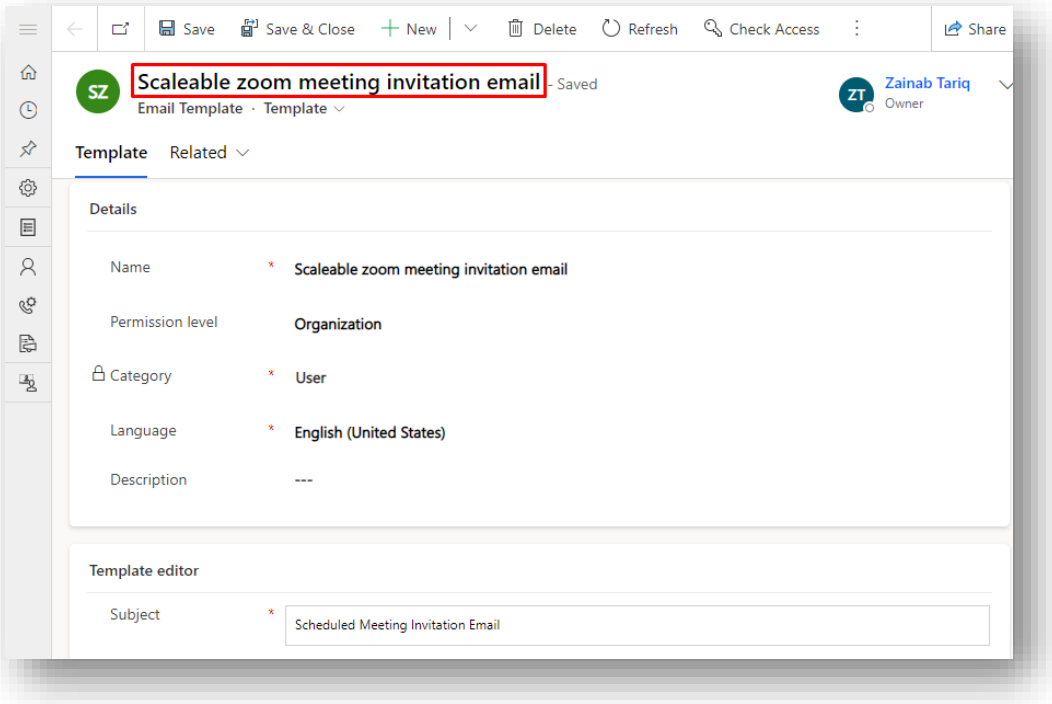


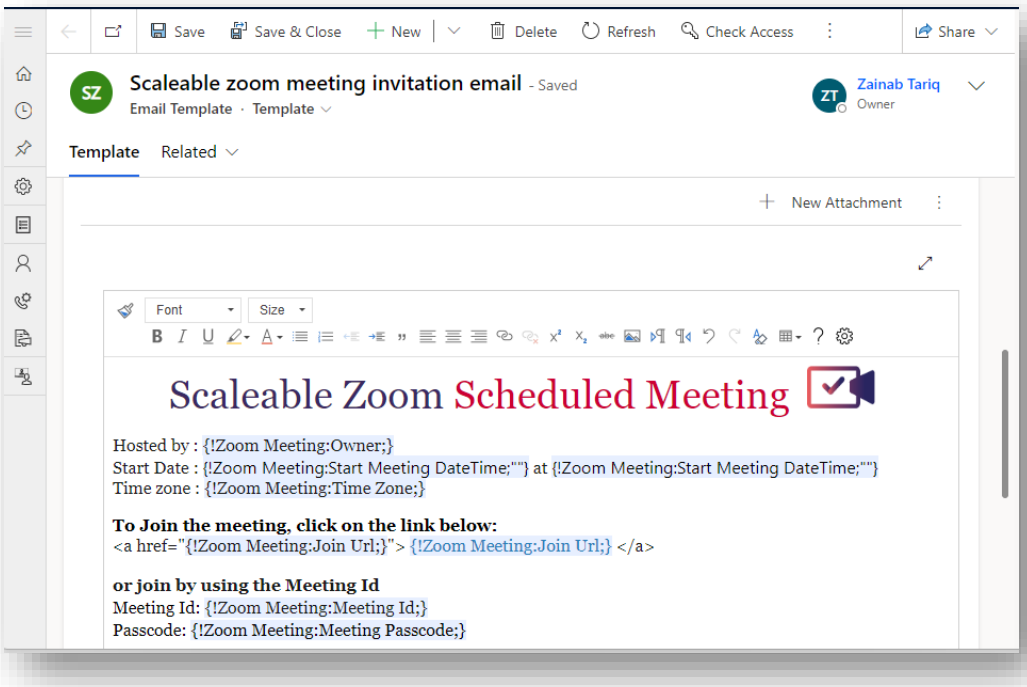


A link to join the meeting and the owner of the meeting is available in template. You can change, add or remove the meeting details in email template.

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.

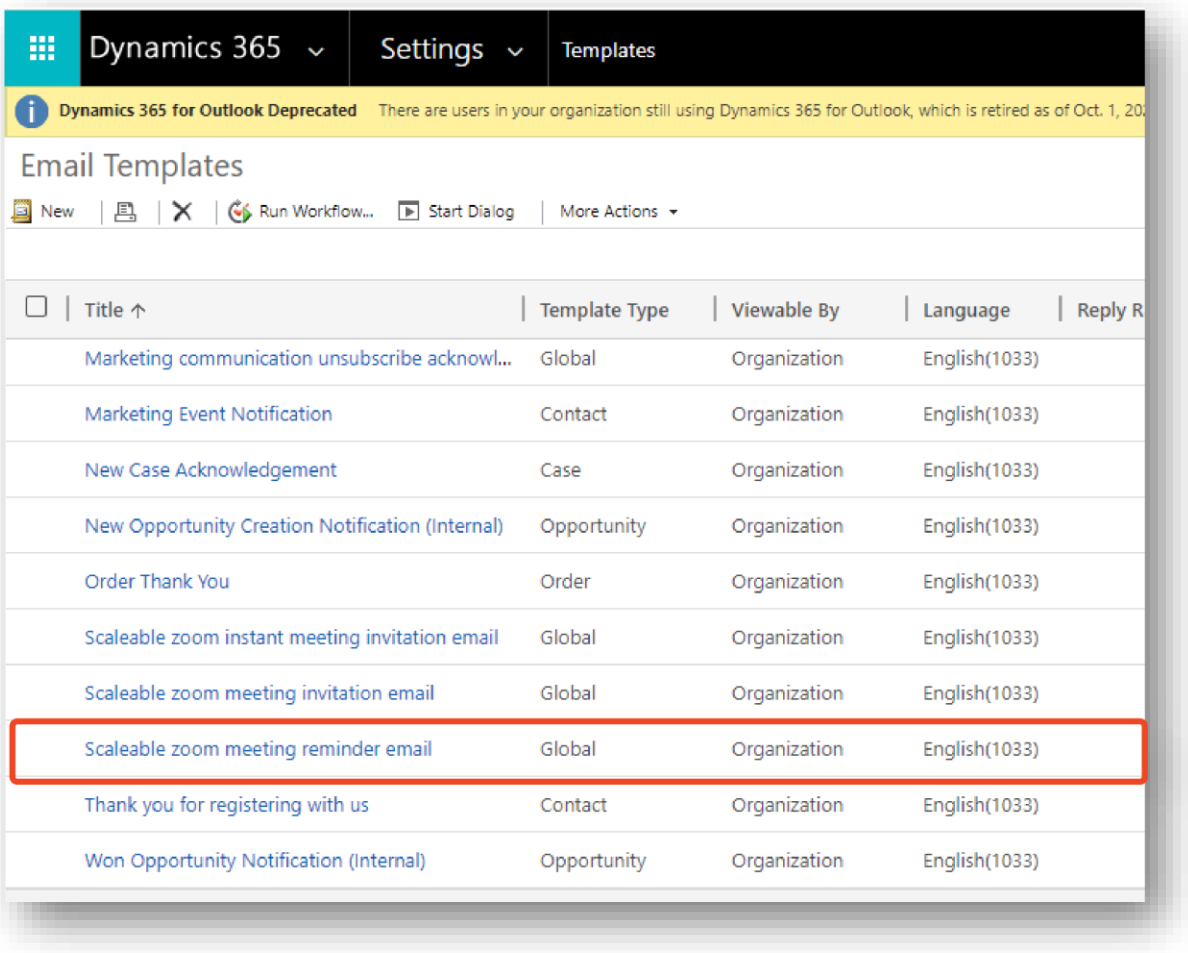




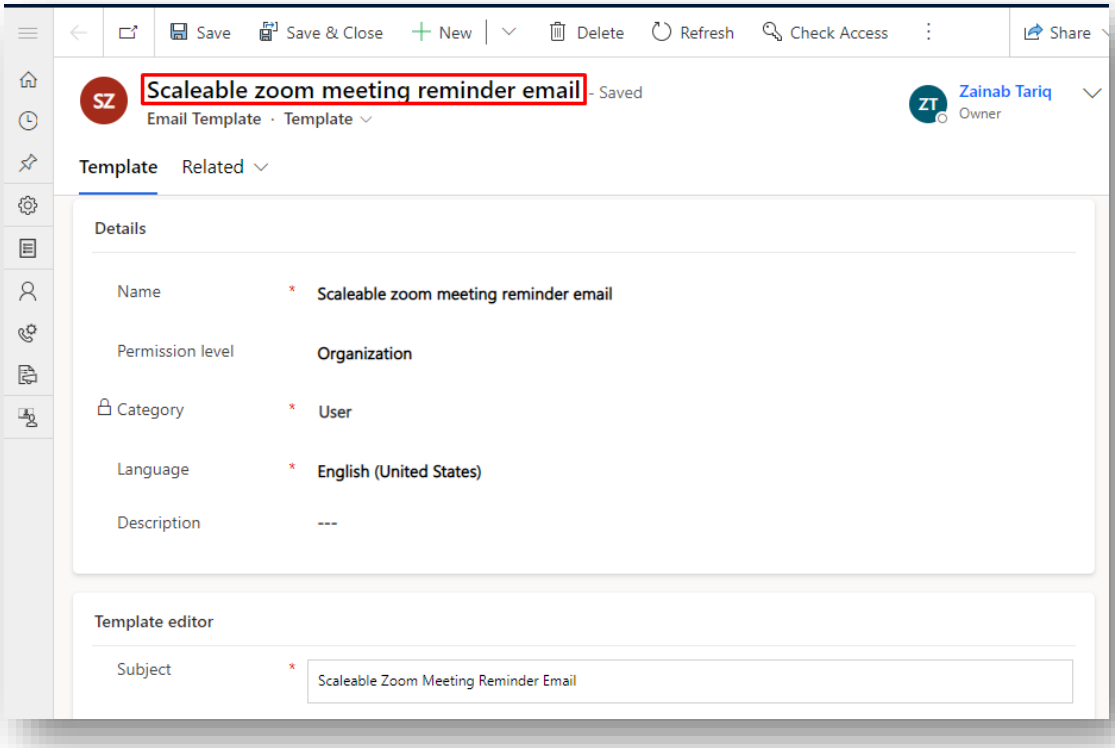
The email template contains the host, Start and end date time, time zone and link to join the meeting.

Meeting Reminder Template:

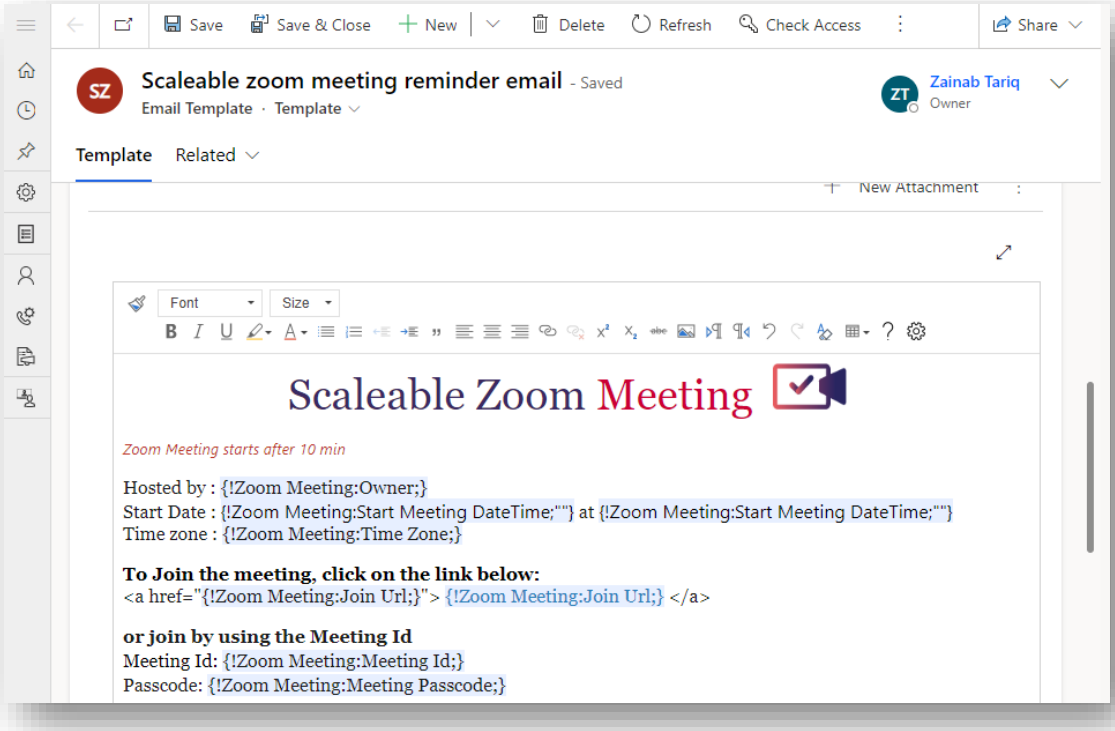
Click on **Scaleable zoom meeting reminder email**.



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

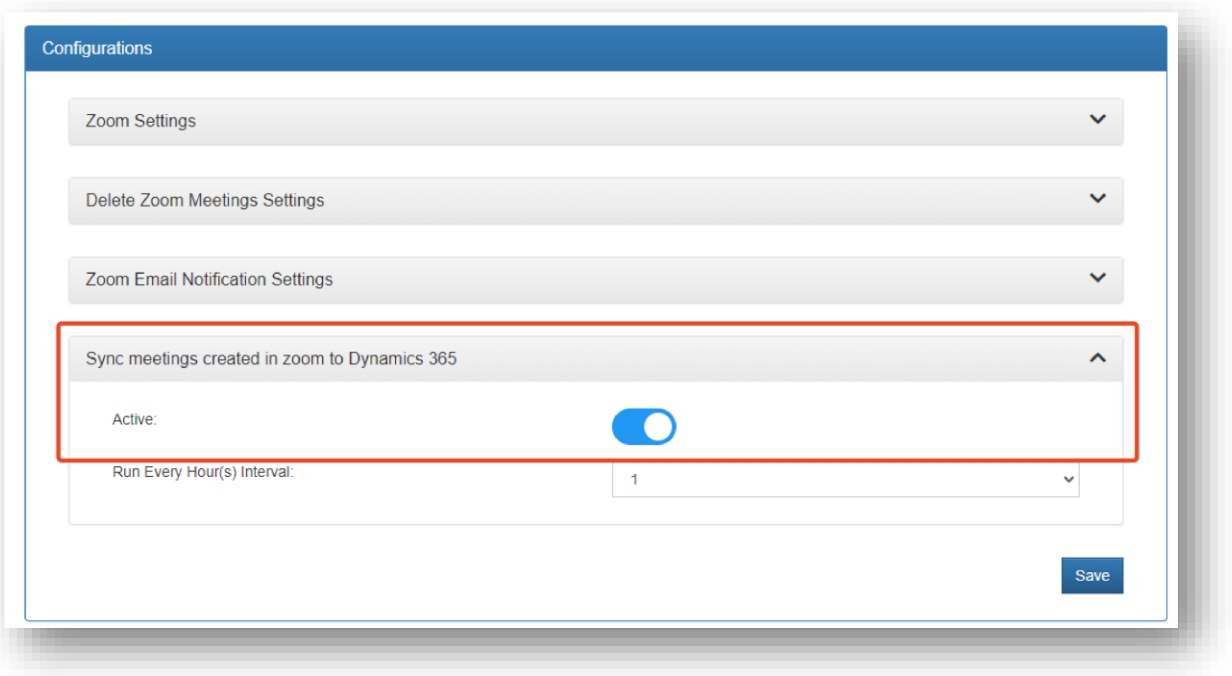

Save
Save & Close
New
Delete
Refresh
Check Access
Share
SZ
Scaleable zoom meeting reminder email
- Saved
Email Template · Template
ZT
Zainab Tariq
Owner
Template
Related
Details
Name
* Scaleable zoom meeting reminder email
Permission level
Organization
Category
* User
Language
* English (United States)
Description

Template editor
Subject
* Scaleable Zoom Meeting Reminder Email


Save
Save & Close
New
Delete
Refresh
Check Access
Share
SZ
Scaleable zoom meeting reminder email
- Saved
Email Template · Template
ZT
Zainab Tariq
Owner
Template
Related
New Attachment
Font
Size
Scaleable Zoom Meeting
Zoom Meeting starts after 10 min
Hosted by : {!Zoom Meeting:Owner;}
Start Date : {!Zoom Meeting:Start Meeting DateTime;""} at {!Zoom Meeting:Start Meeting DateTime;""}
Time zone : {!Zoom Meeting:Time Zone;}
To Join the meeting, click on the link below:
 {!Zoom Meeting:Join Url;}
or join by using the Meeting Id
Meeting Id: {!Zoom Meeting:Meeting Id;}
Passcode: {!Zoom Meeting:Meeting Passcode;}

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.



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:

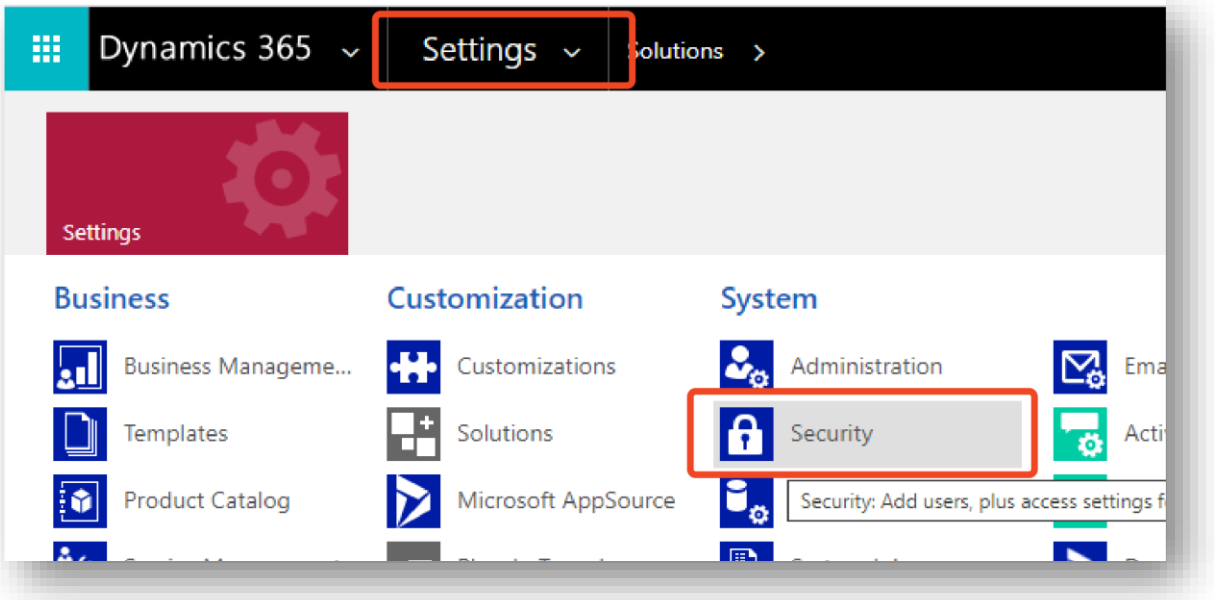
User with “Scaleable Zoom Read” role will only be allowed to read entities of Scaleable Zoom except registration.

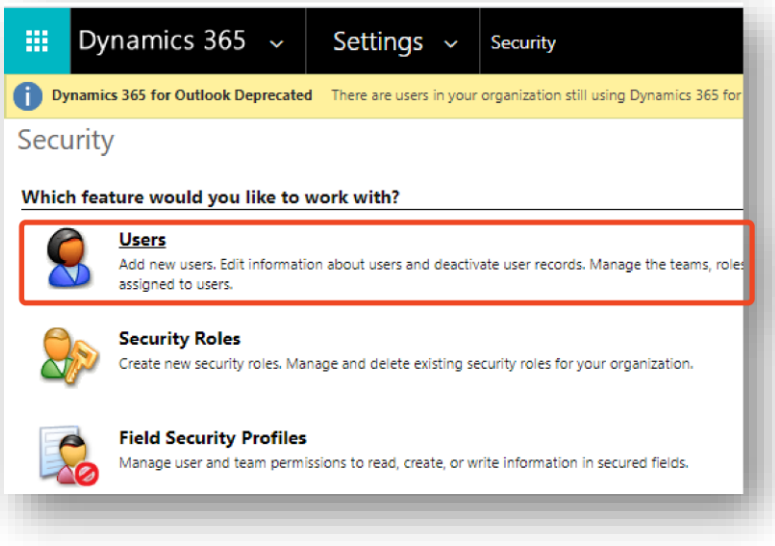
Scaleable Zoom Service:

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.

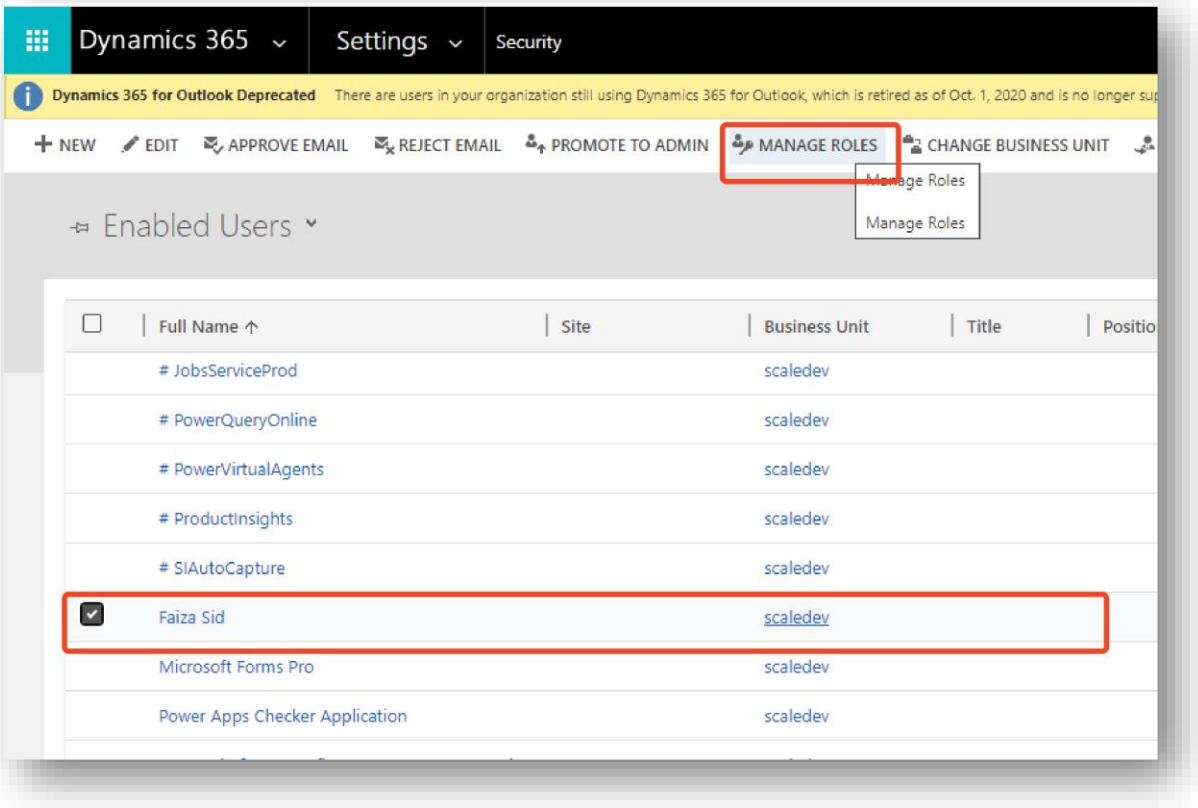
Assign Scaleable Zoom Role:

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

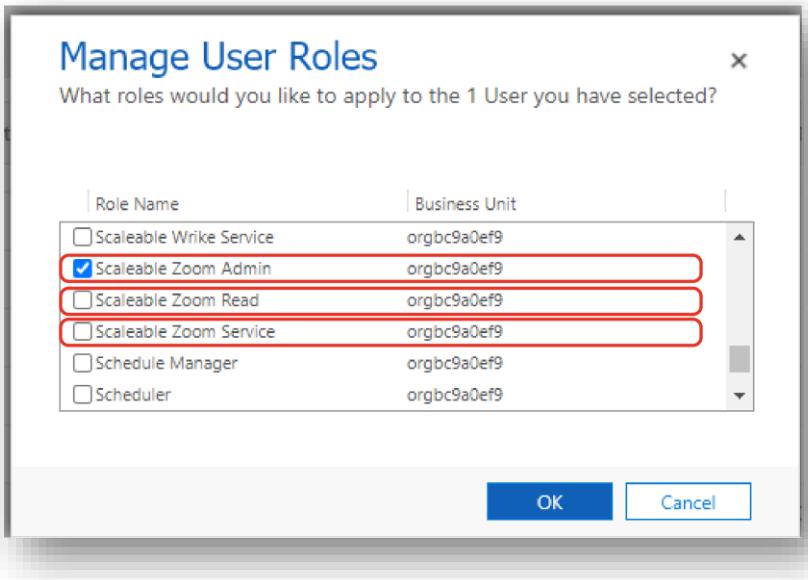




Select the user to assign role and click **Mange Role**



Assign role to the user

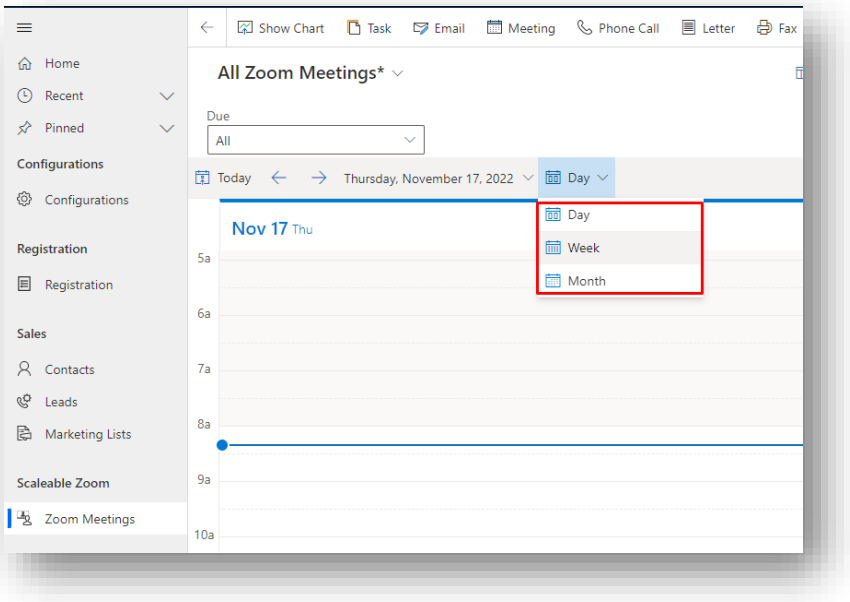


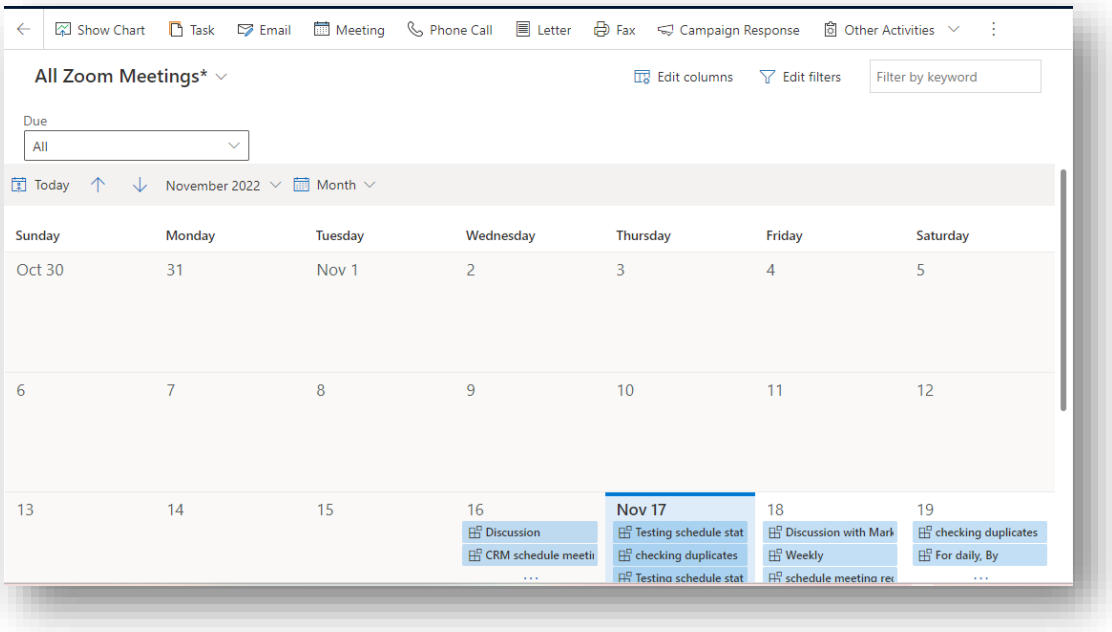
Zoom Meeting Views:

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:

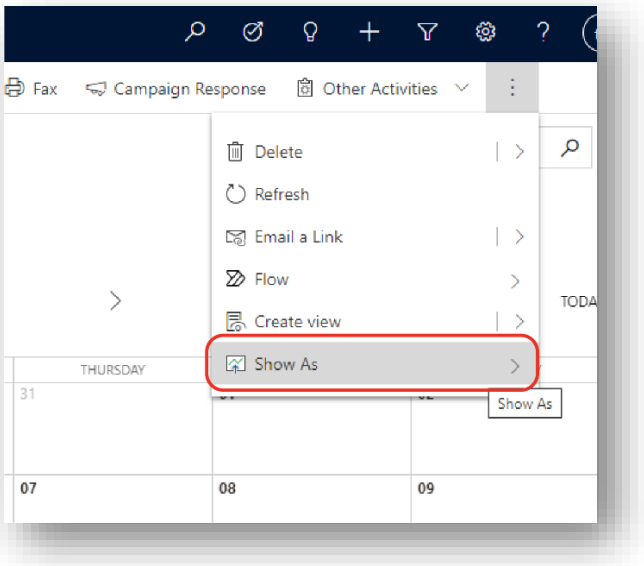
Click on **Zoom Meetings** from sitemap. You'll have a calendar view of all your scheduled meetings. Calendar view can be changed to daily, weekly, and monthly view.

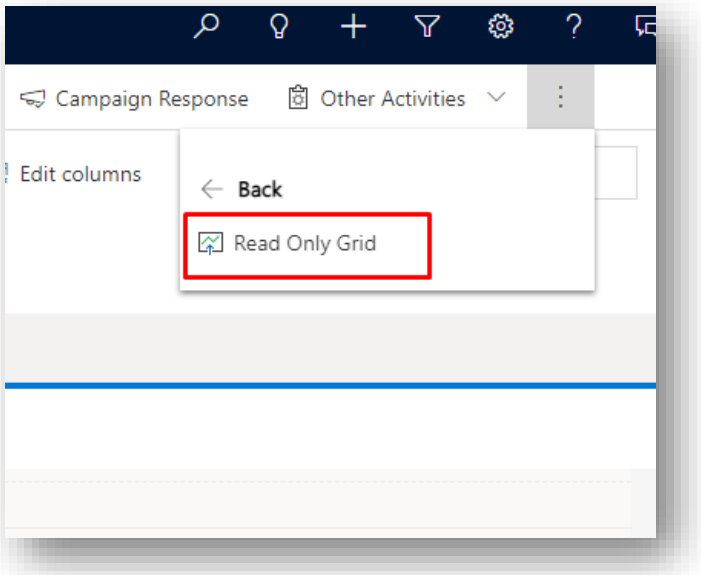


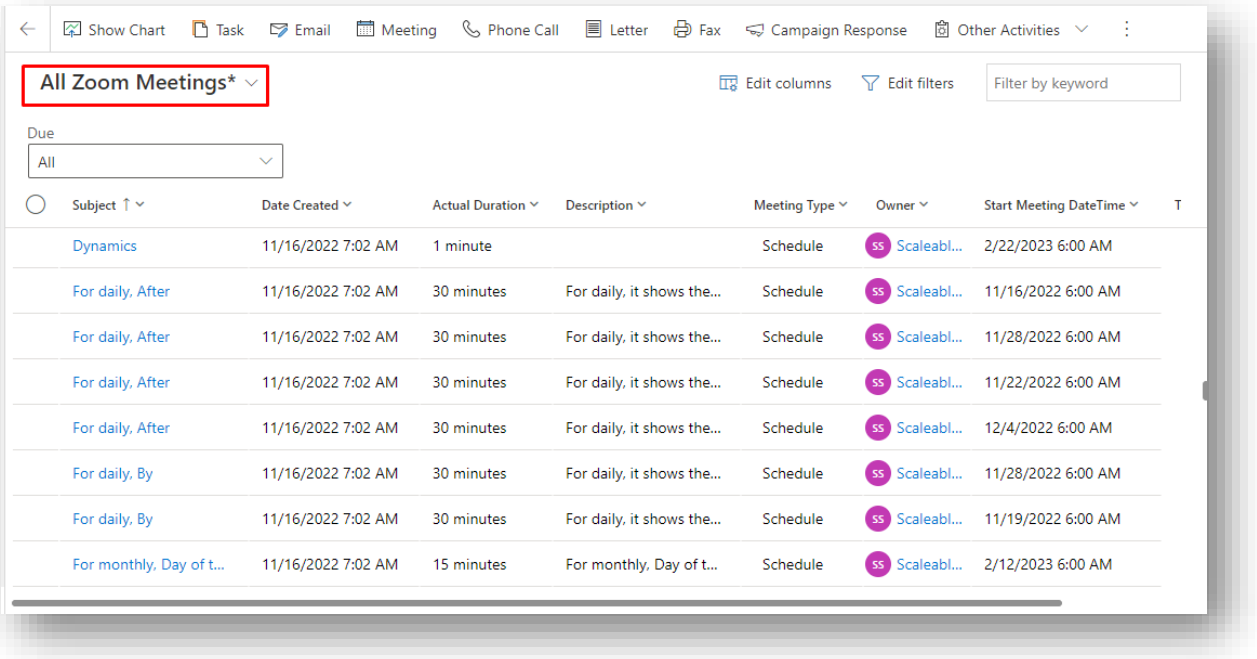


Grid View:

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

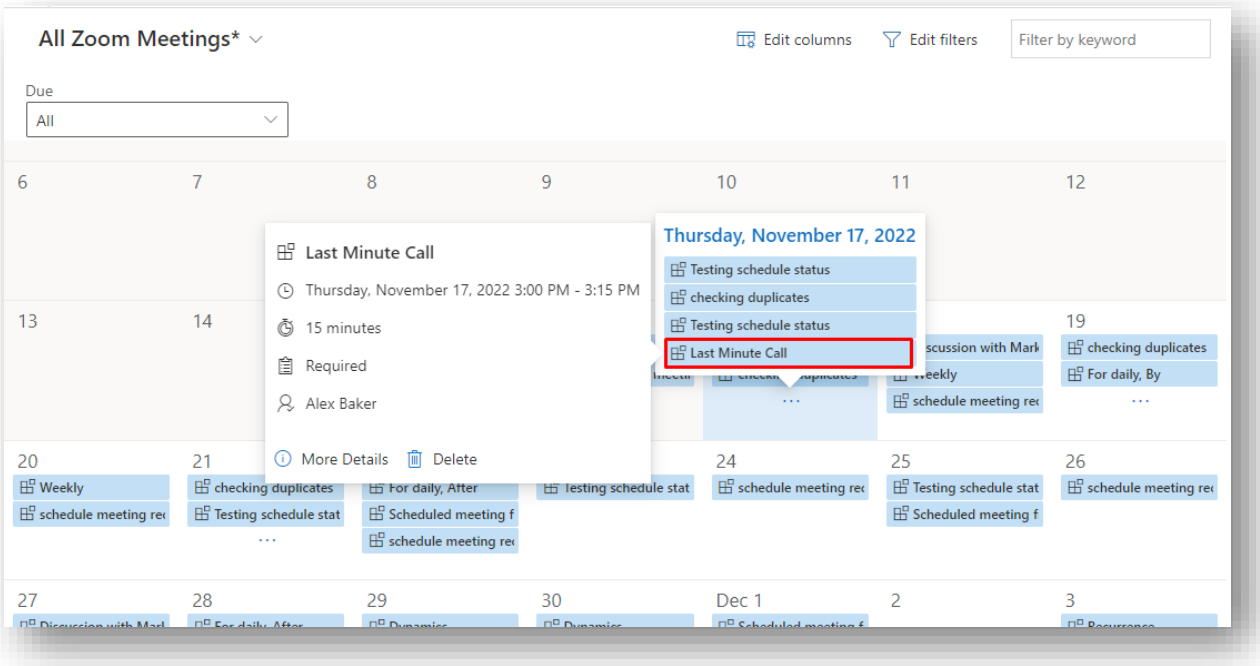






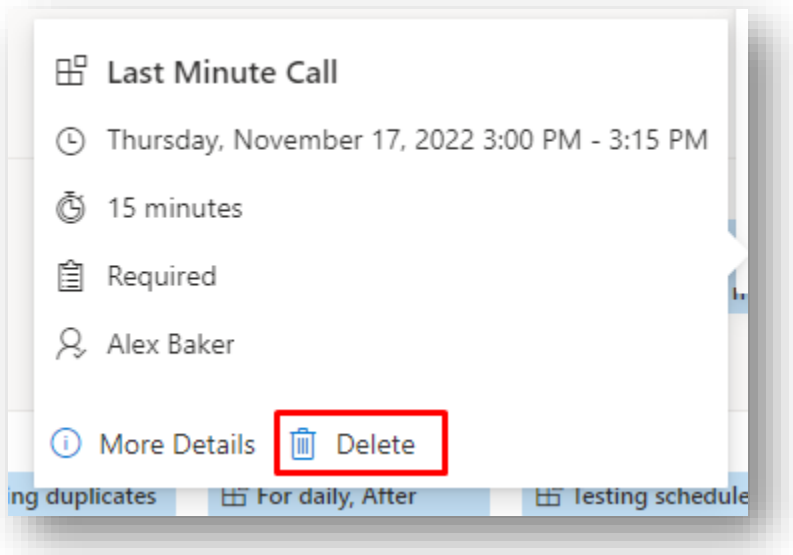
Meeting Details

Click on any meeting from the calendar.



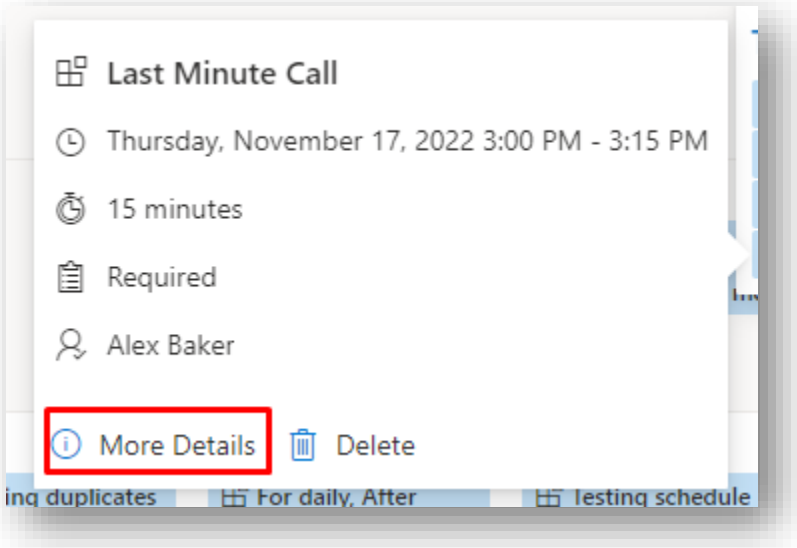
Delete Meetings:

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



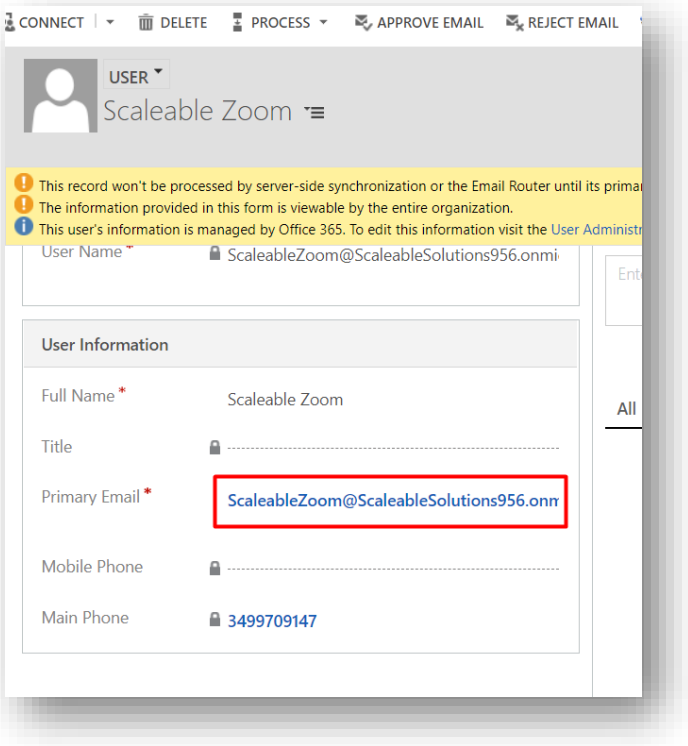
More Details:

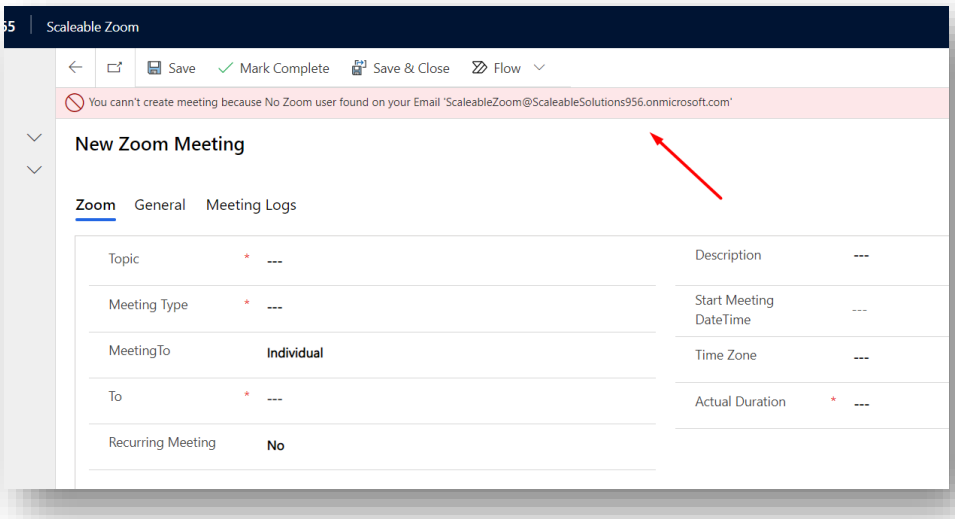
You can also view your meeting details by clicking on **More Details** button.



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.

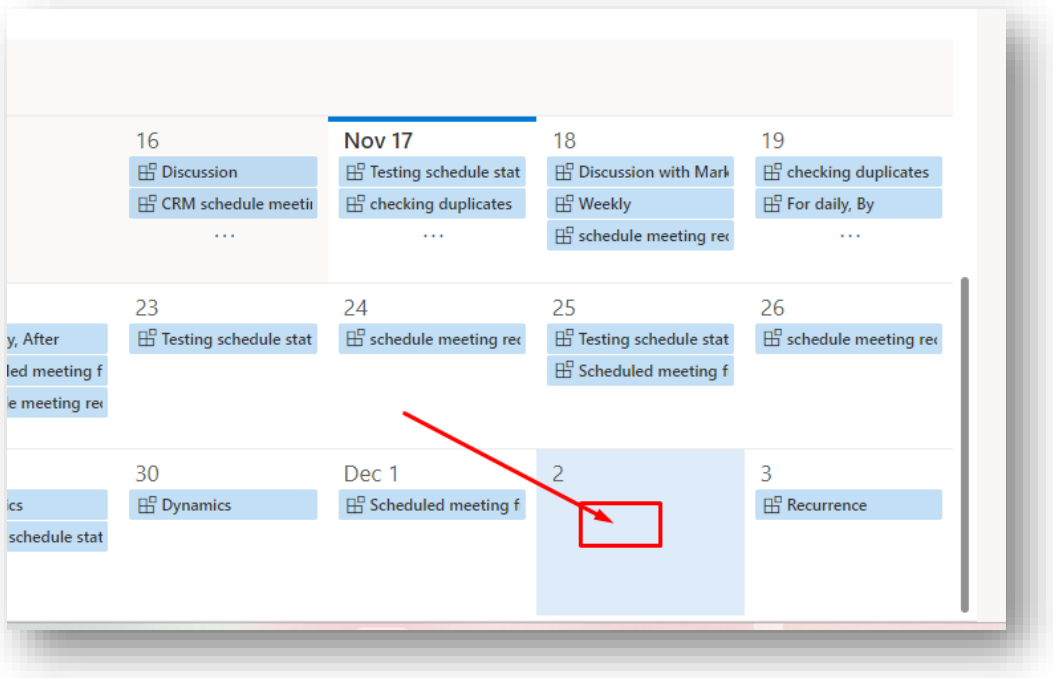




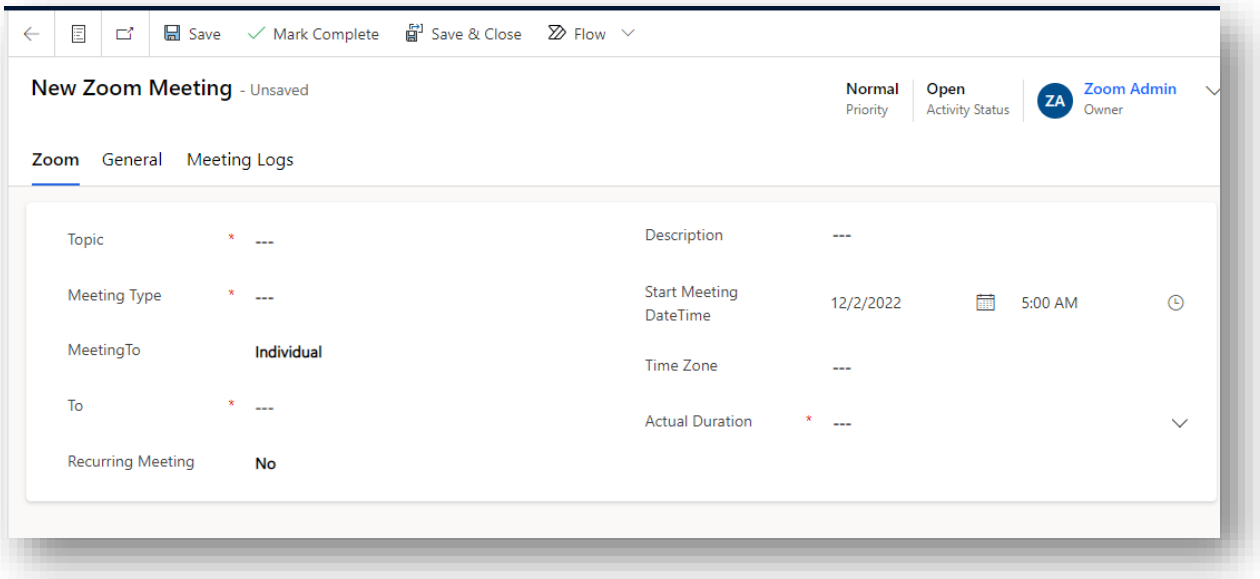
Create Zoom Meetings:

From Calendar:

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

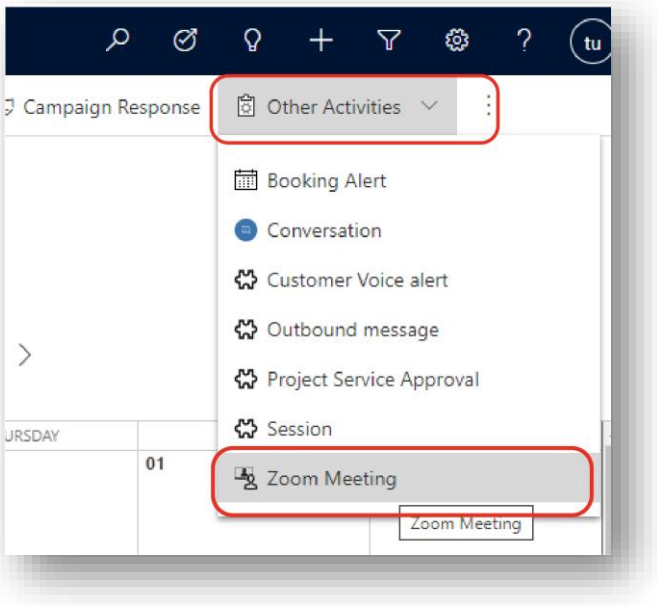


Fill in the information.



From Toolbar:

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



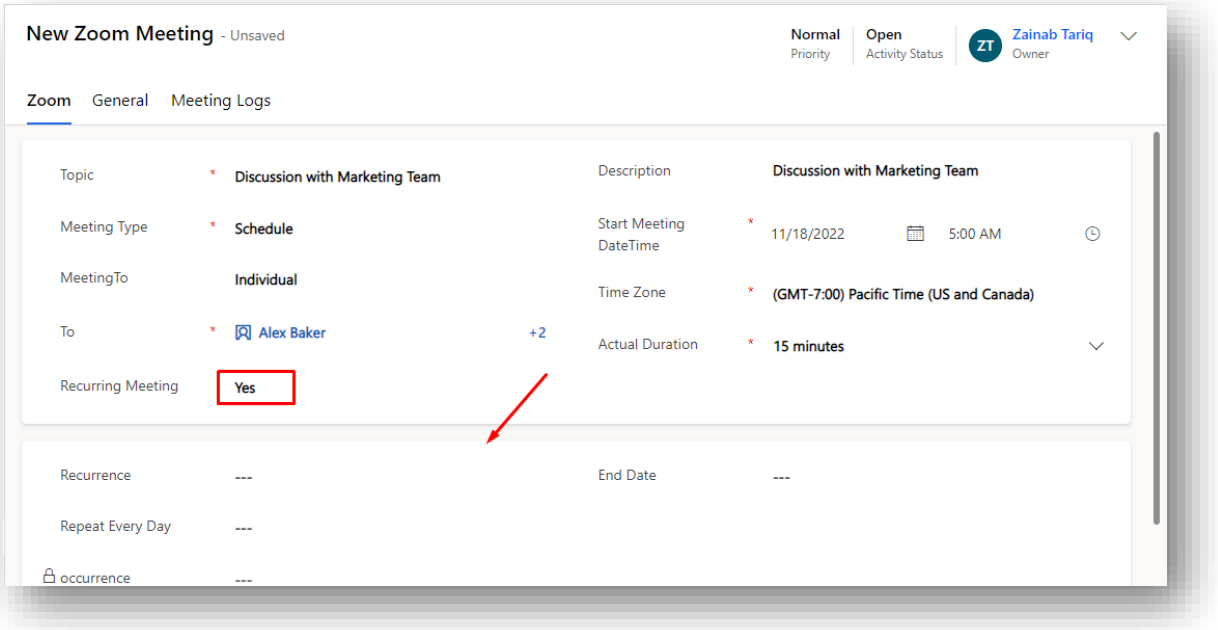
Scheduled Zoom Meetings:

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 selects 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:

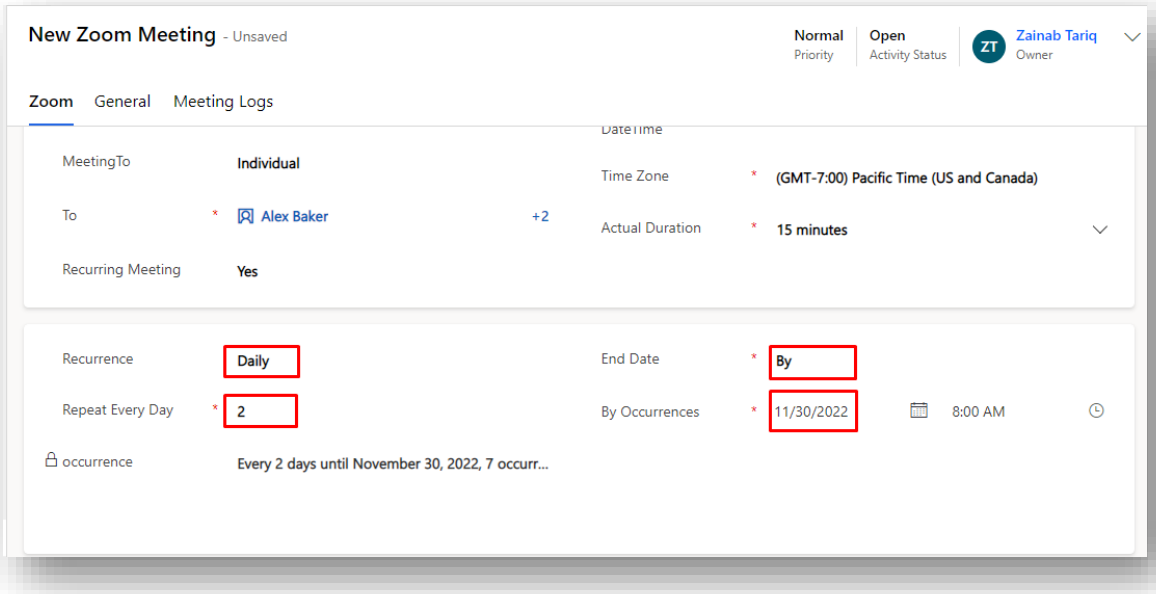
You can also create recurring meetings by selecting **Recurring meeting** "Yes". After that the recurring details information section will be visible. Fill in the recurring information.



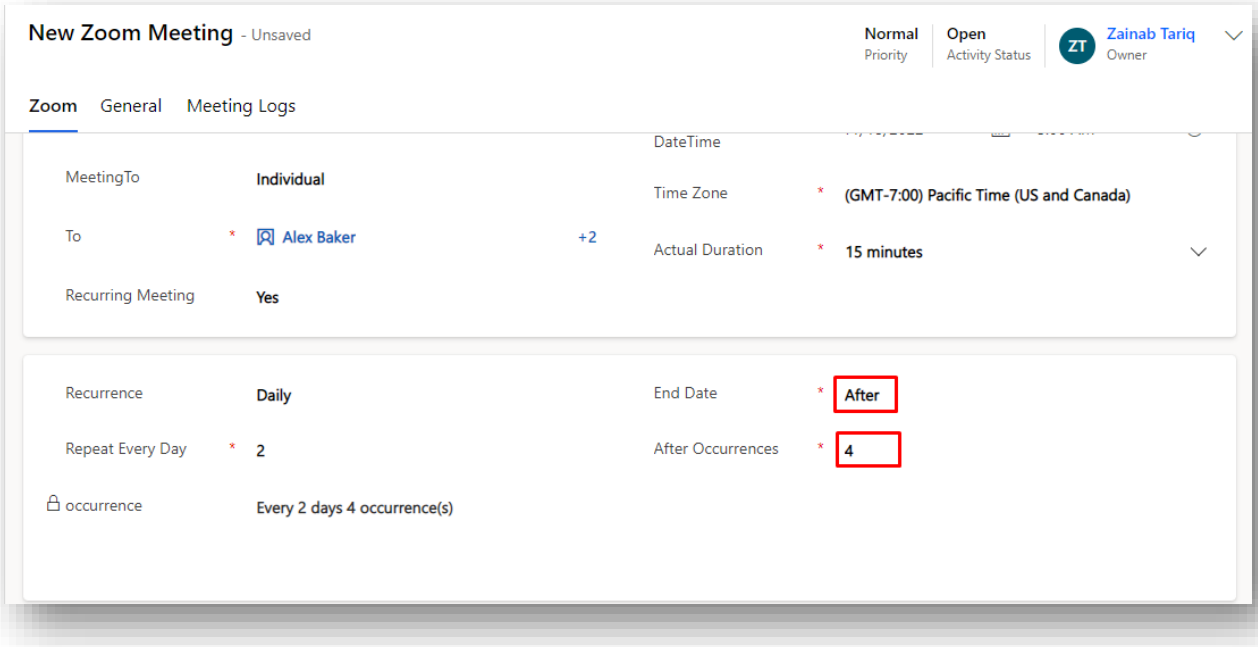
Daily:

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.

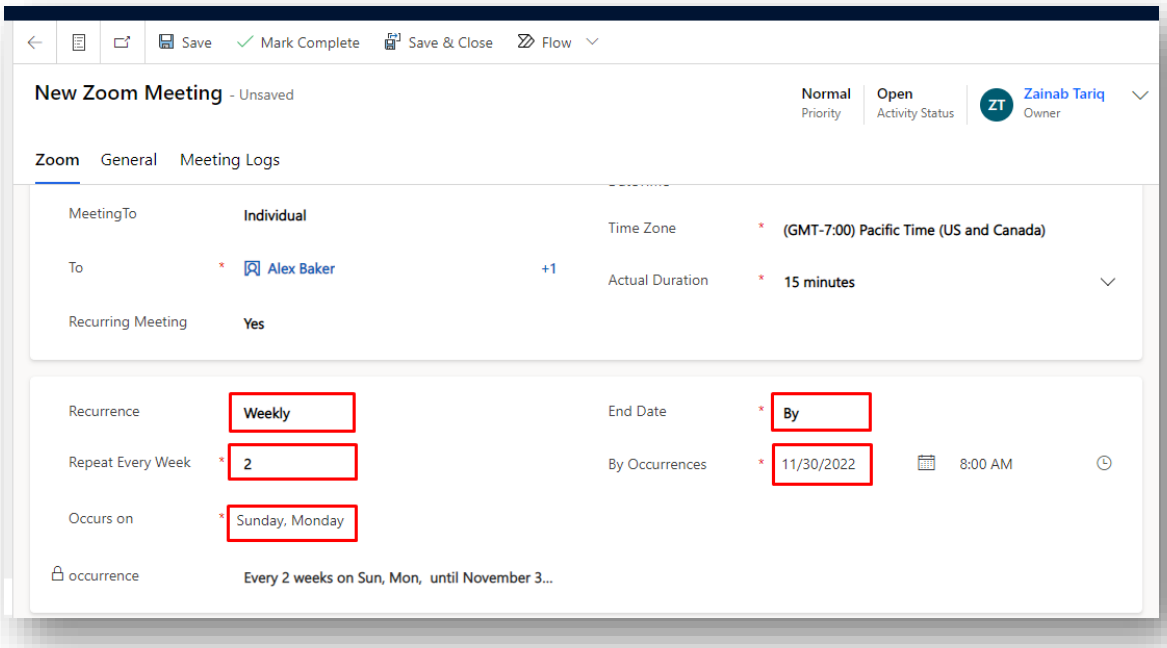


"After" will allow you to add the number of total occurrences you want.



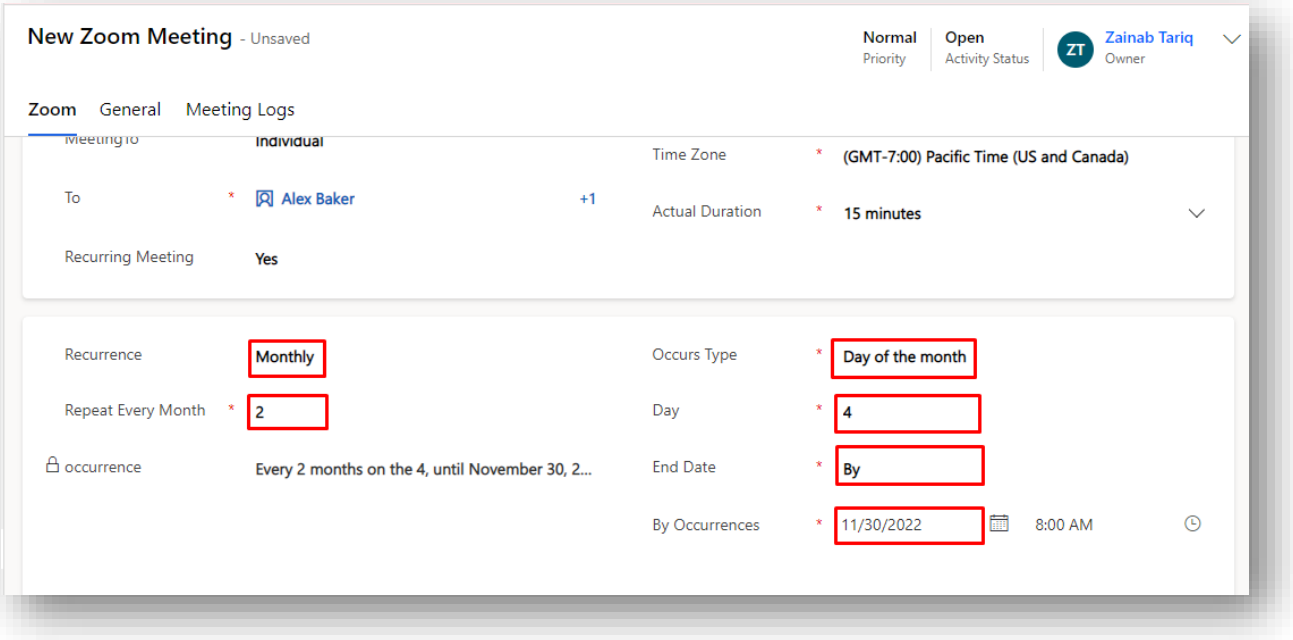
Weekly:

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.

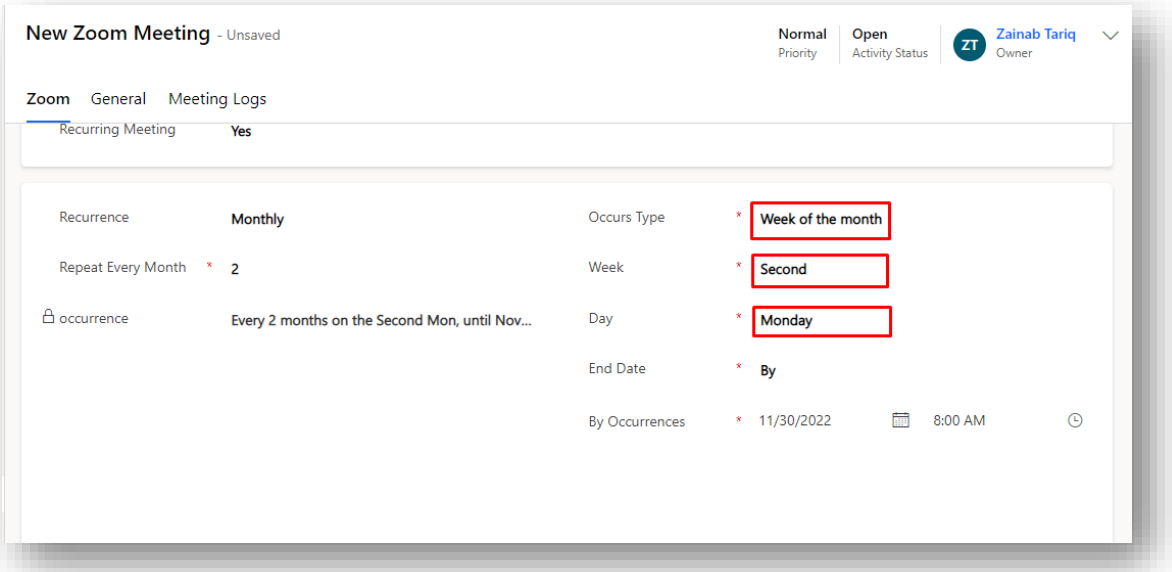


Monthly:

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.



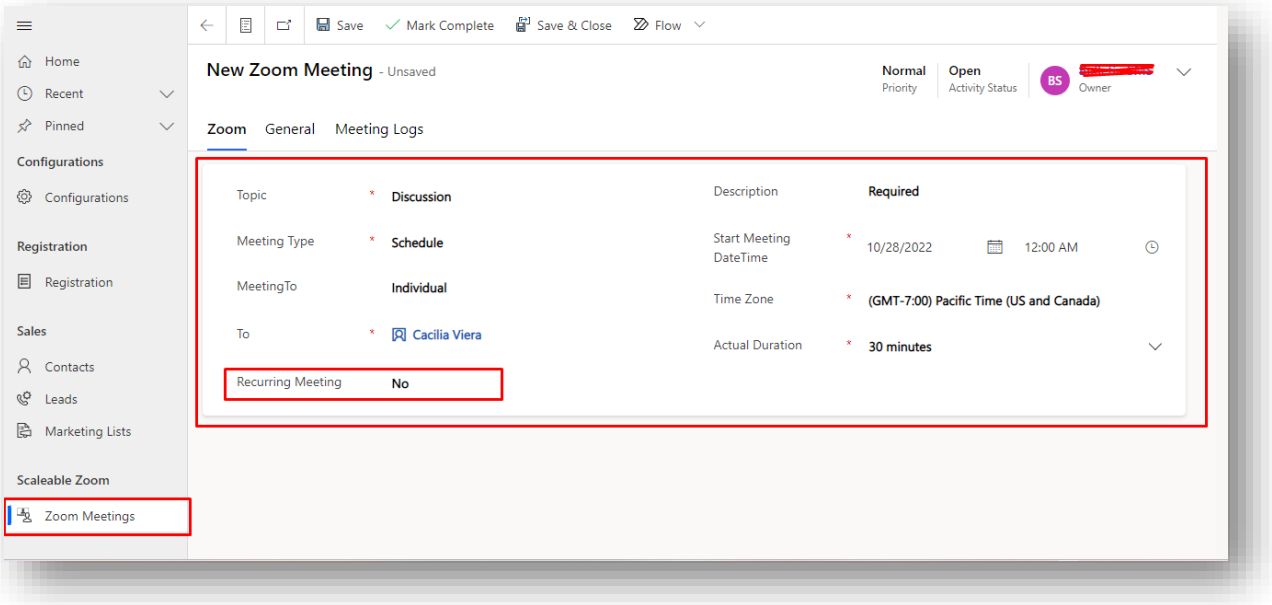
“Week of the month” will allow you to select the **Week** and **Day** of the months. Selecting “Second” in **Week** and “Monday” in **Day** will allow you to create meetings on the second Monday of the months.



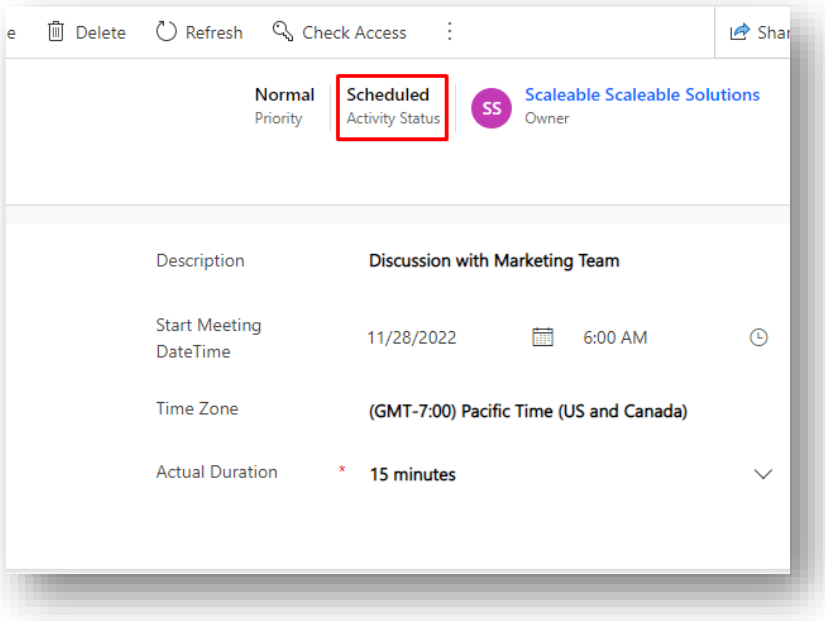
Non-Recurring Meetings:

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

Click **save.**

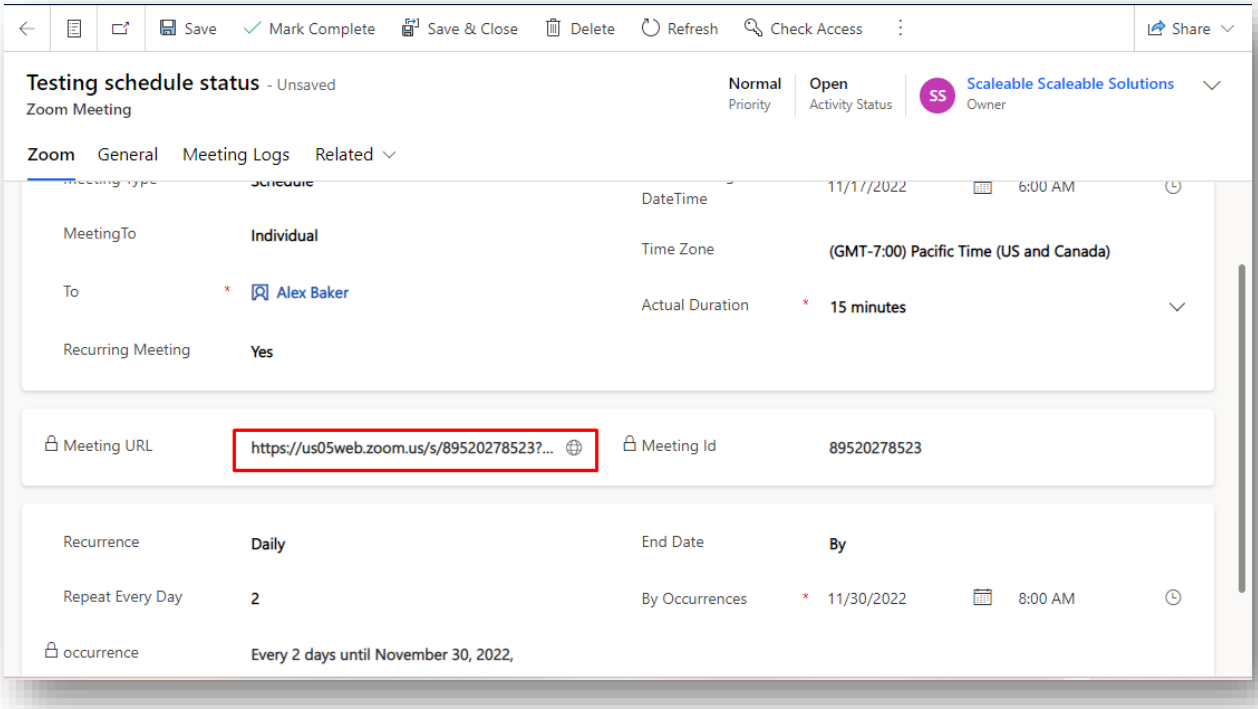


After creating the meeting, the **Activity Status** of the meeting will be changed to “Scheduled”.



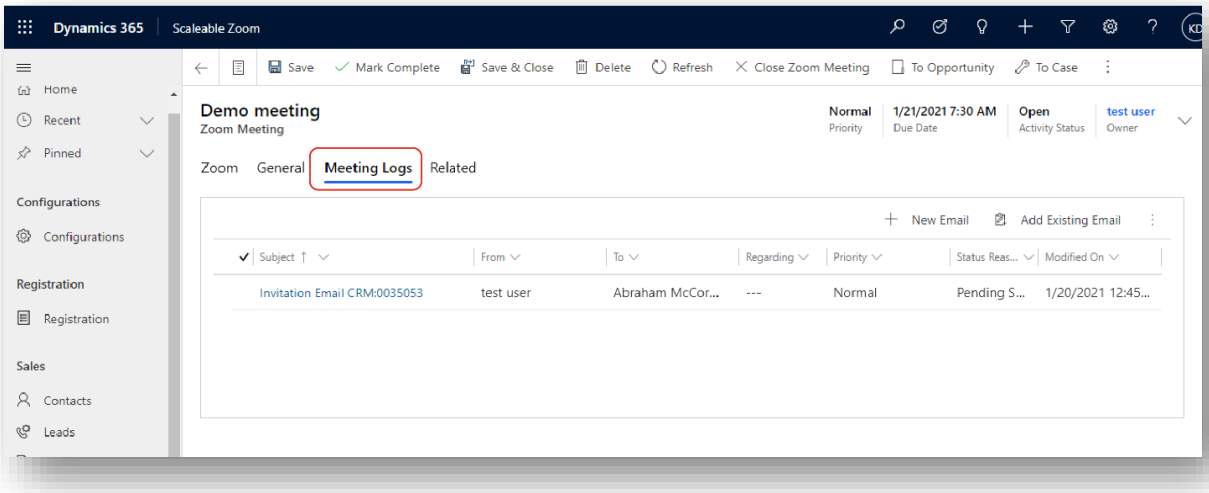
Meeting URL and ID:

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



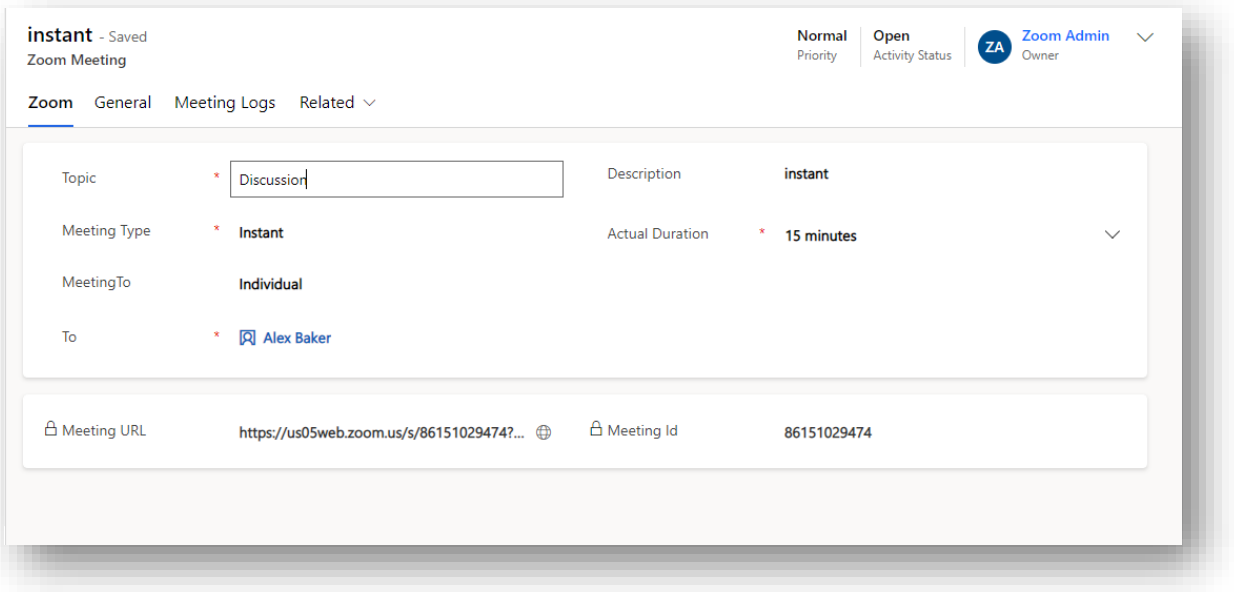
Meeting logs:

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.

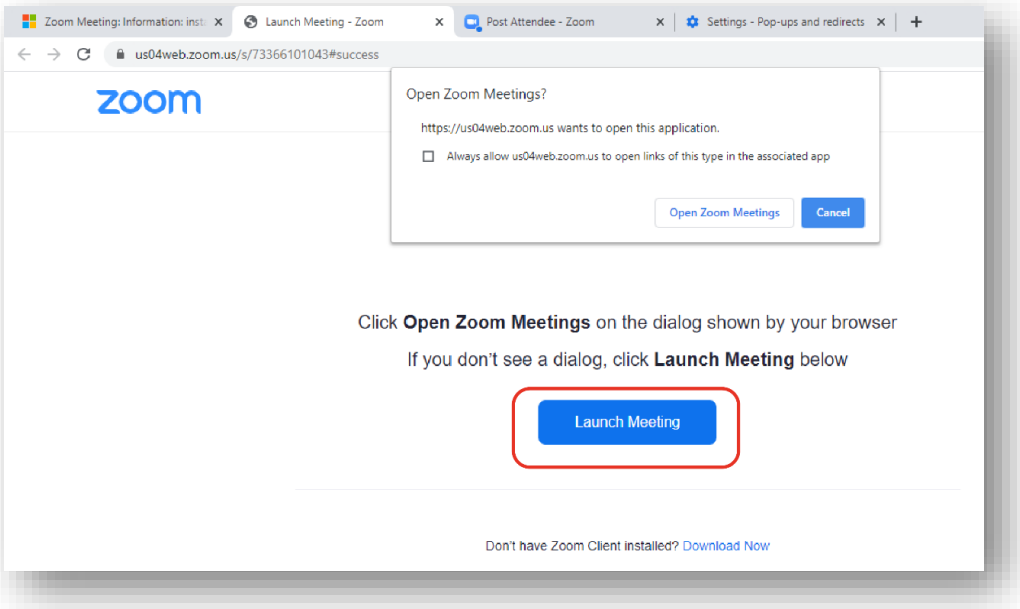


Instant Meetings:

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



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.

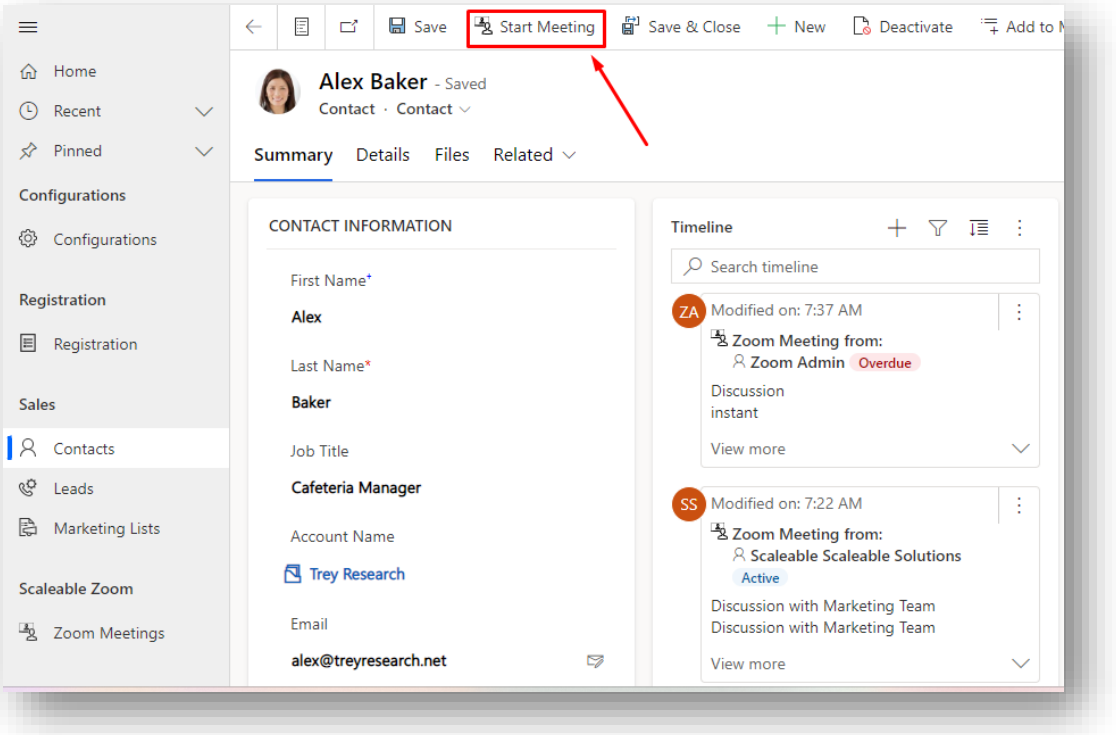


Note: Make sure the browser is not blocking for Pop-ups.

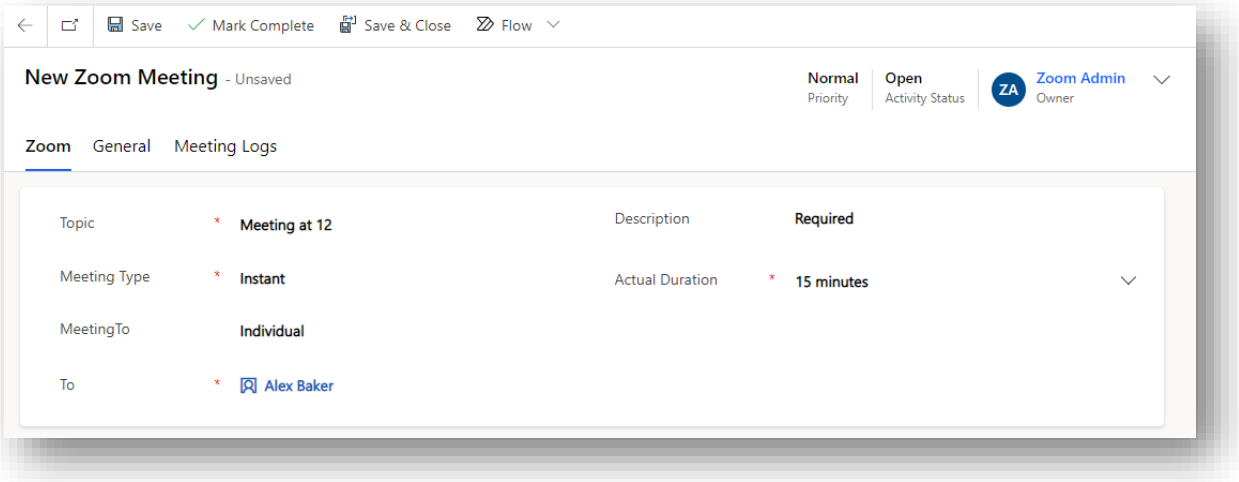
Meetings from Contacts/Leads/Marketing Lists:

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.



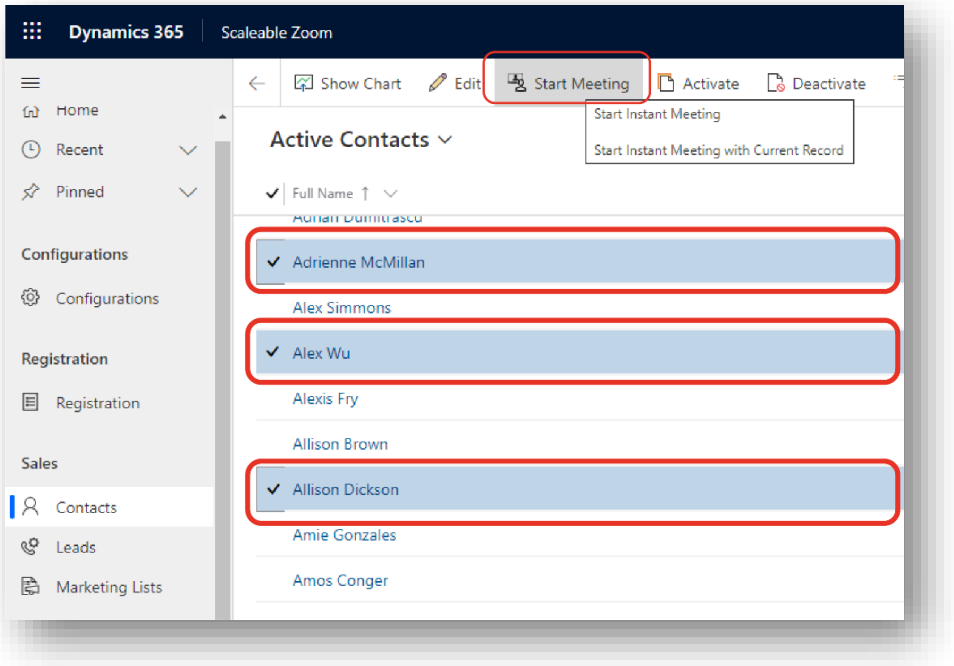
Fill in the meeting information and click **save**.



Multiple Contacts/Leads:

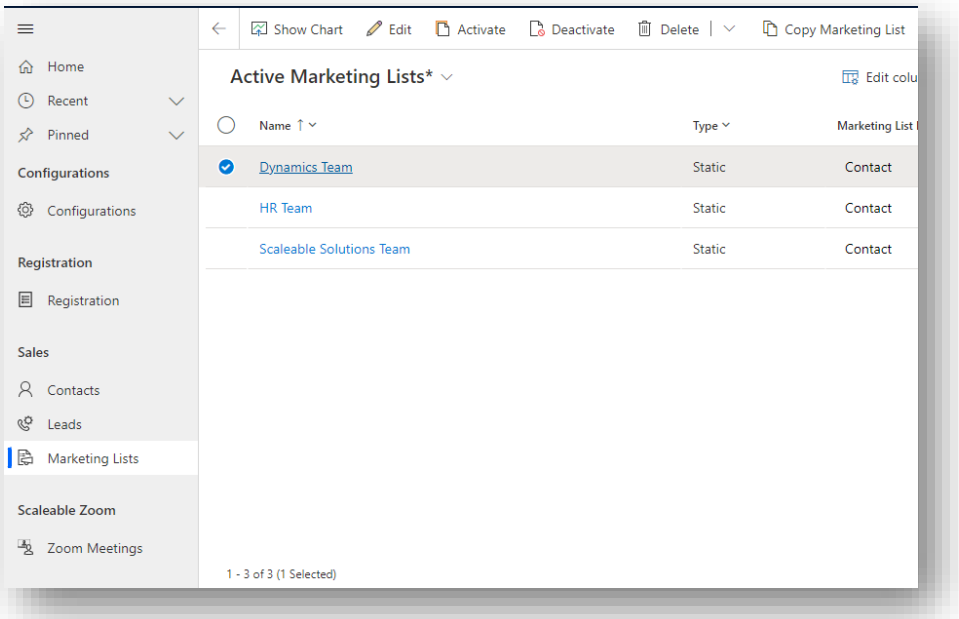
Meeting can be created from grid view.

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

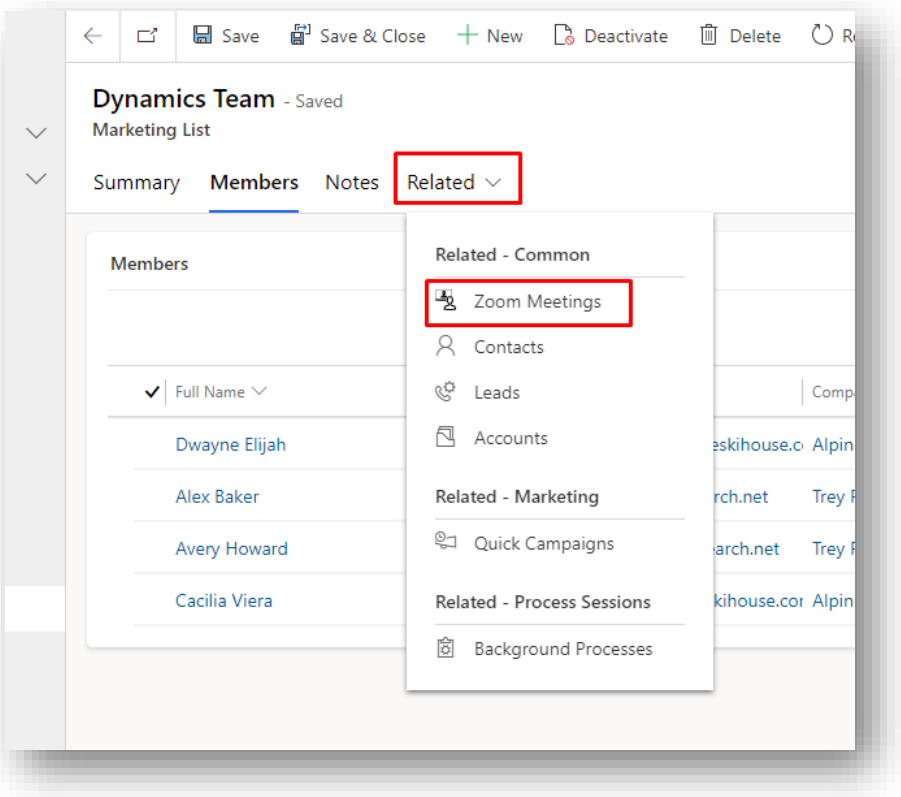


Marketing List:

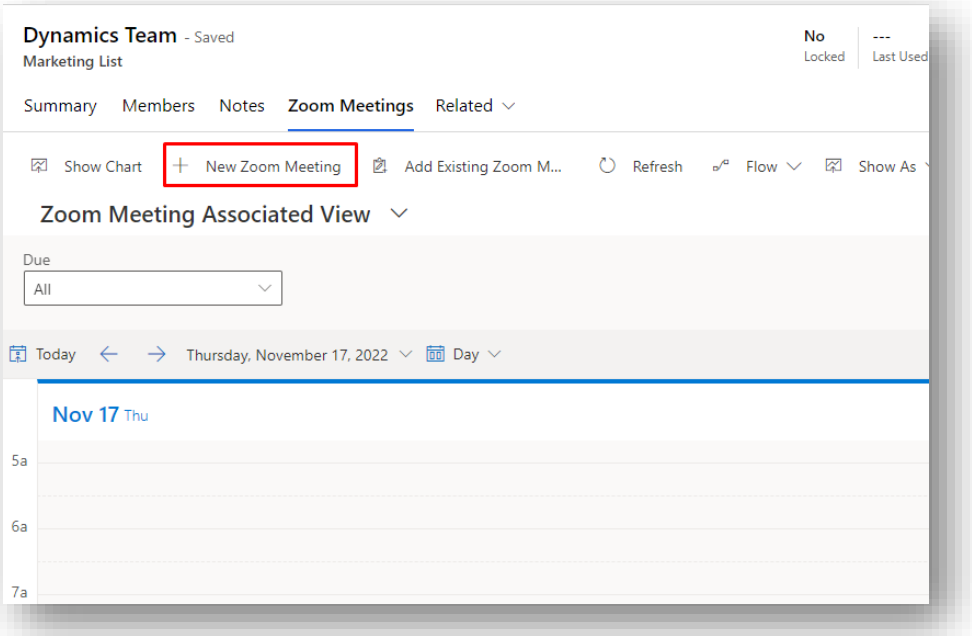
You can start an instant or schedule meeting directly with your marketing list with one click.
Open the marketing list.



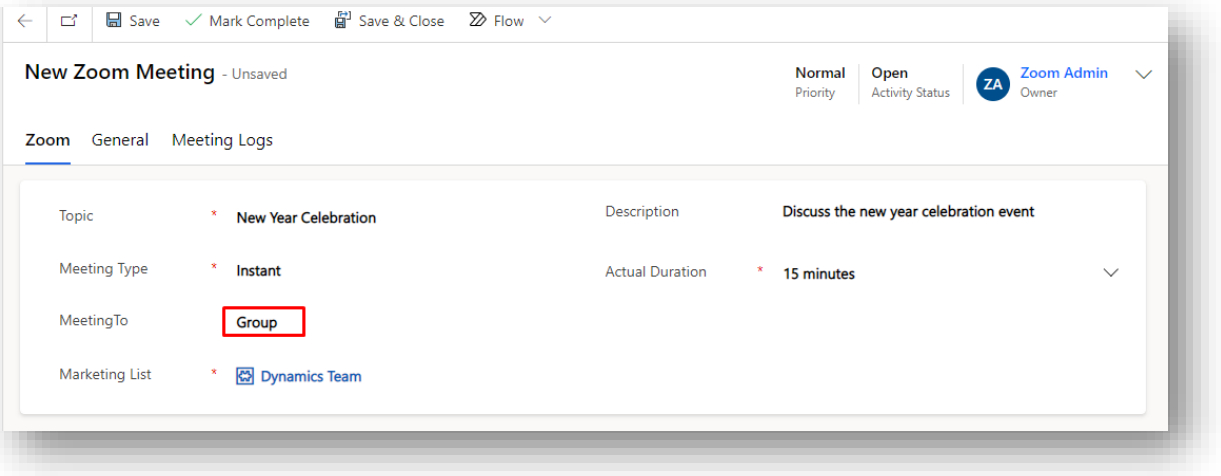
Click on **Related > Zoom Meetings.**



Click on + **New Zoom Meeting.**



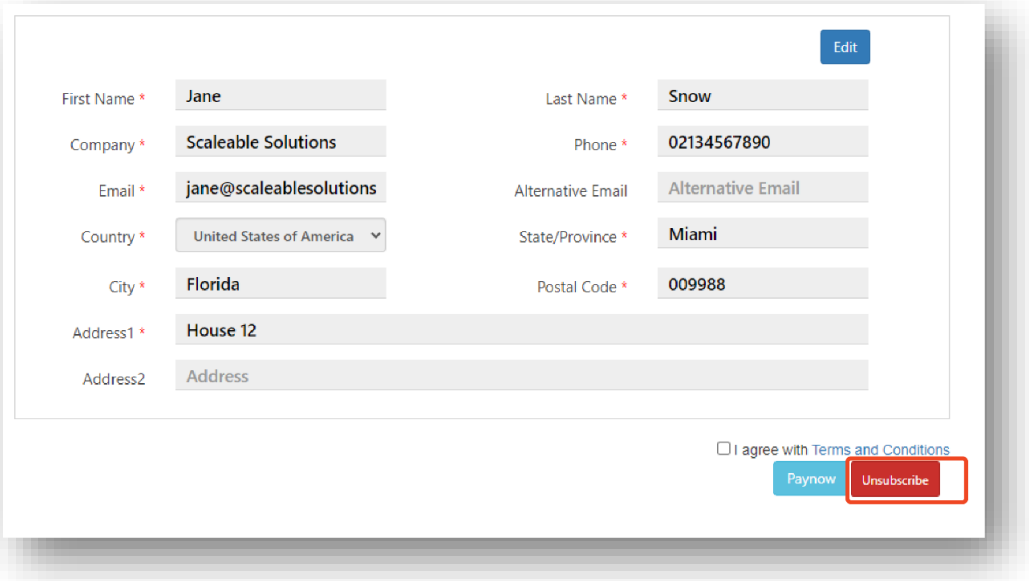
Fill the form and click on **save**.



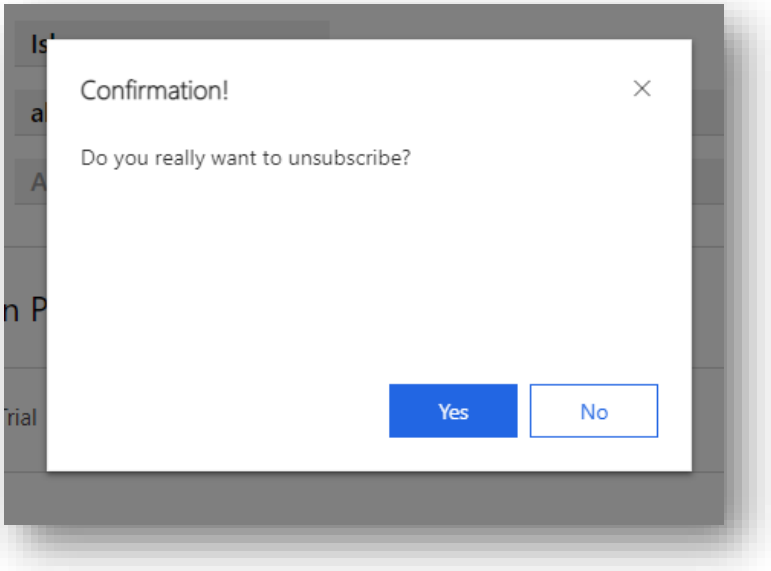
Unsubscribe:

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

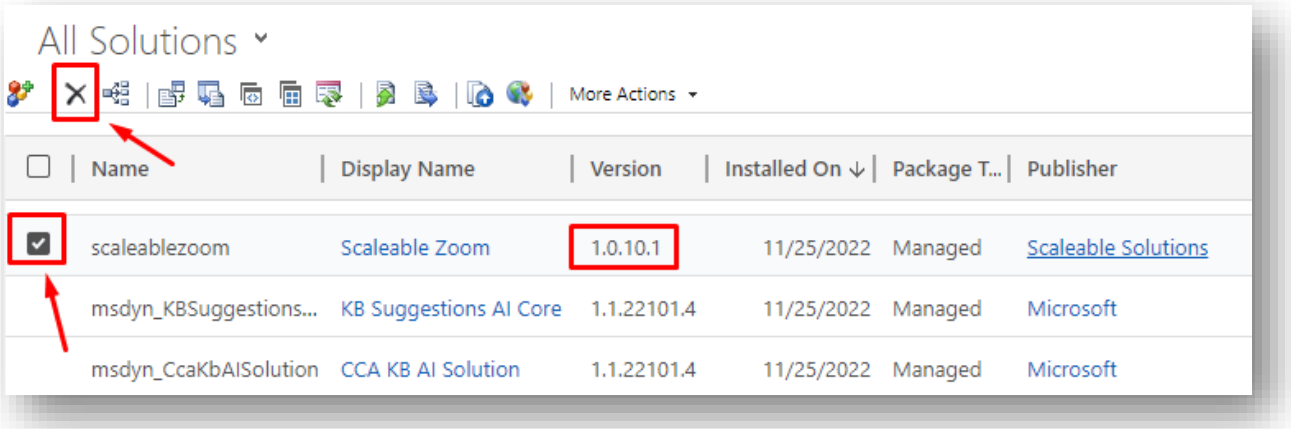
From Registration, click **Unsubscribe**



Confirm your choice.



Uninstall:

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

-