Install Zoom connector for Creatio

Zoom connector for Creatio lets you add Creatio activities that have automatically generated links to Zoom online meetings. You can also synchronize meetings created in Zoom, receive a list of attendees, and store the meeting transcript (paid Zoom license only) to generate a summary using Copilot.

The app has the following key features:

- Create a Zoom online meeting for new or existing Creatio activities.
- Set up the base Zoom meeting parameters in Creatio.
- Transfer the index of attendees from Zoom to Creatio after the meeting ends.
- Store the meeting transcript to generate a summary through Copilot
- Create Zoom meetings from business processes.

Install the app

To install the app, follow the instructions in Creatio documentation: [Install apps from the Marketplace.](#)

If you use Creatio on-site, make sure that Creatio can access the Internet. To do this:

1. Grant access to the http://package-store.creatio.com/ website.
2. Install the Zoom connector for Creatio app using the following link: https://marketplace.creatio.com/app/zoom-connector-creatio

Connect Zoom to Creatio

Create Zoom API keys and add them to Creatio

Note. The setup part must be executed on behalf of the user included in "System administrator" role.

1. Open the Zoom App Marketplace: https://marketplace.zoom.us/
2. Open the [*Develop*] block in the top right → [*Build App*].
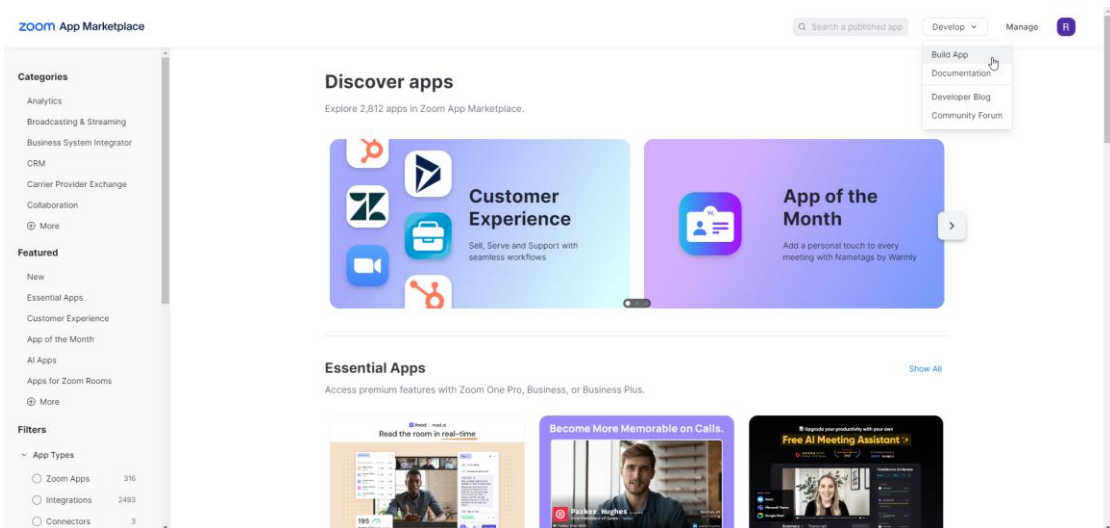
3. Select *"General app"*.
4. Enter an arbitrary name of the integration in the [*Name*] field in the top left. For example, "Creatio app."
5. Make sure the app will not be published on Zoom App Marketplace and is marked as *"User-managed"*.
6. Enter the redirect URL of the Zoom connector in the [*OAuth Redirect URL*] field. Use the following format: https://sitename.domain.com
7. Enter the same URL in the [Add allow list] field.
8. Go to the [*Scopes*] tab → [*Add Scopes*].
9. Select and apply the following scopes:

Scope	Description
Meeting	
meeting:read:list_meetings	View all user meetings
meeting:read:meeting	View a user's meetings
meeting:read:list_past_participants	View a past meeting's participants
meeting:update:status	Update a meeting's status
meeting:delete:meeting	Delete a meeting

meeting:write:batch_registrants	Add registrants to a meeting
meeting:write:meeting	Create a meeting for a user
meeting:delete:registrant	Remove a meeting's registrant
meeting:update:meeting	Update a meeting
meeting:write:invite_links	Create invite links for a meeting
meeting:write:registrant	Add a registrant to a meeting
meeting:update:registrant_status	Update a meeting registrant's registration status
Phone	
phone:read:recording_transcript	View a call recording transcript
Recording	
cloud_recording:read:recording	View a recording
cloud_recording:read:registrant	Cloud recording registration
archiving:read:list_archived_files	Get an account's archived meeting or webinar files
cloud_recording:read:recording_analytics_summary	Return a meeting recording's analytics summary
cloud_recording:read:registration_questions	Retrieve a list of questions displayed for users registering to view a recording
archiving:read:archived_files	Return a specific meeting instance's archived files
cloud_recording:read:recording_settings	Retrieve settings applied to a meeting's Cloud Recording
cloud_recording:read:list_recording_registrants	List registrants of a past meeting's on-demand cloud recordings
cloud_recording:read:recording_analytics_details	Get recording analytics details
cloud_recording:read:list_recording_files	Returns all of a meeting's recordings

| cloud_recording:read:list_user_recordings	Lists all cloud recordings for a user
User	
user:read:email	Verify a user's email
user:read:user	View a user

10. Go to the [*Access*] tab and activate [*Event Subscription*] block.
11. Click [*Add New Event Subscription*].
12. Select the "*Webhook*" Webhook Method .
13. Enter an arbitrary name of the integration in the [*Subscription name*] field.
14. Click [*Add Events*].
15. Add the following necessary events:
    I. "*Meeting*" type
       - Start meeting.
       - End meeting.
       - Meeting has been created.
       - Meeting has been updated.
       - Meeting has been deleted.
    II. "*Recording*" type
       - Recordings Transcript files have completed.
16. Fill out the "*Event notification endpoint URL*" field before saving. To receive the URL:
    I. Open Creatio
    II. Go to the [*Webhooks*] section.
    III. Open the [*Help*] tab → "*Webhook URL.*"
    IV. Get the Webhook URL. To do this, click "*Zoom*" → "*Click to get your Webhook URL*".
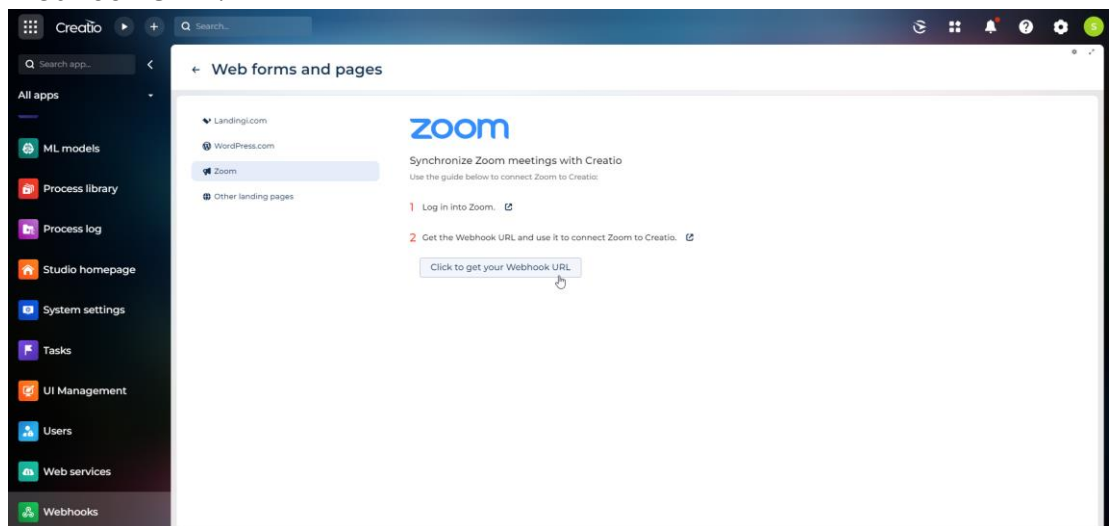
Webhook URL is copied automatically. Do not close this page.

17. Come back to Zoom App settings and fill out the *"Event notification endpoint URL"* field using copied value.
18. Save the settings.

19. Fill out the settings in Creatio using corresponding values from Zoom settings:
   I.   Copy the "*Secret Token*" value and paste it in Creatio into the "*Zoom webhook secret token*" field on the "Access" tab.
   II. Copy the "*Client Id*" value on the left and paste it in Creatio into the "*Zoom client Id*" field.
   III. Copy the "Client secret" value on the left and paste it in Creatio into the "Zoom client secret" field.
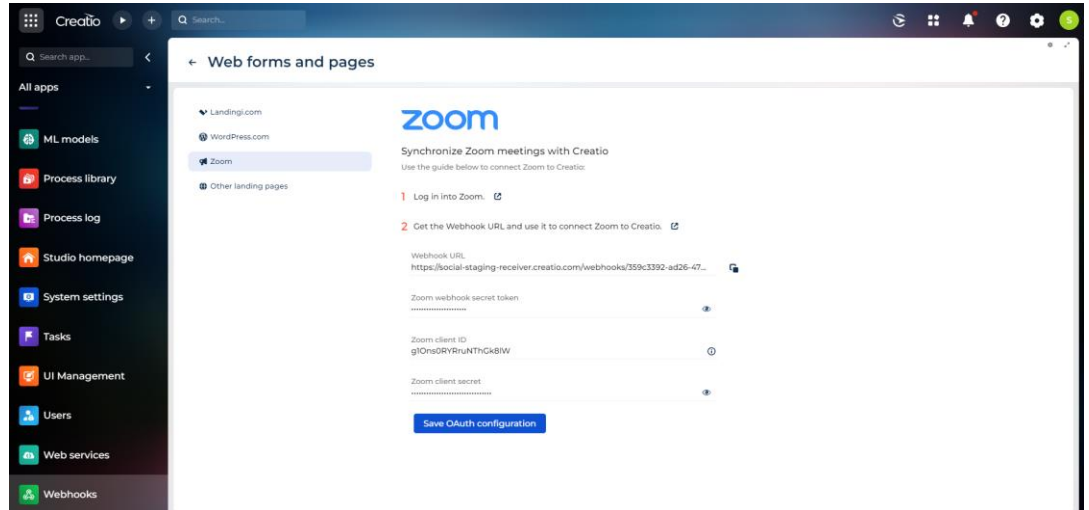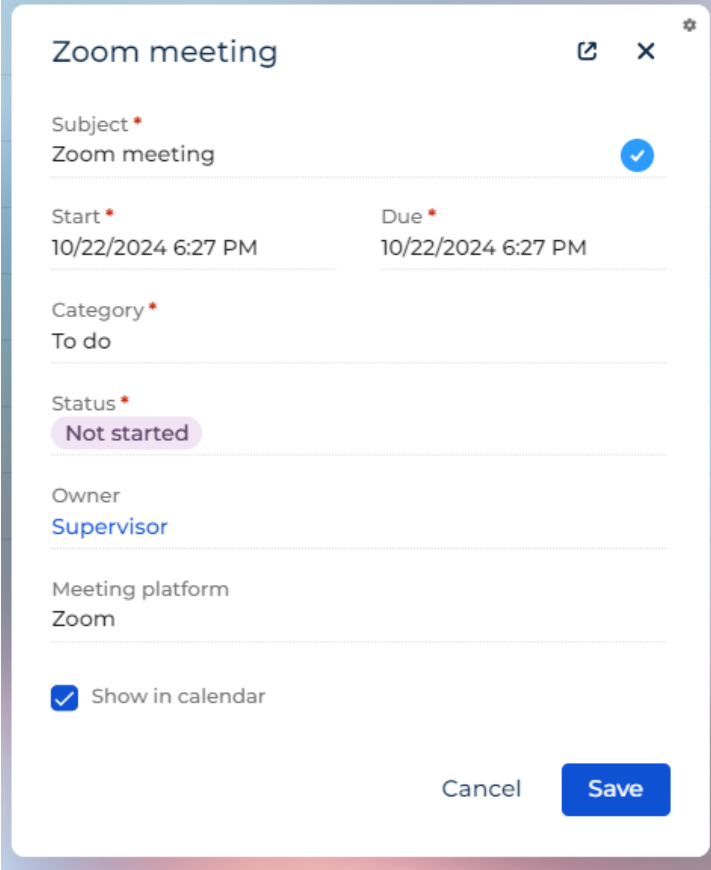
20. Save your OAuth configuration.
21. Click "*Authenticate in Zoom*" and follow the instructions until the end.
22. Users that do not have the "System administrator" role must proceed with the authentication by following these steps:
   I.   Click ⚙ to open the System Designer.
   II. Go to the [*Import and integration*] block → [*Connect to Zoom*] and follow the instructions until the end.

Create a Zoom meeting from Creatio

1. Open the [*Tasks*] or [*Calendar*] section.
2. Click [*New*]. This opens a window.
3. Fill out the required fields and select "Zoom" in the [*Meeting platform*] field:

As a result, Creatio will save the record and add a Zoom meeting link. View the link in the [*Join URL*] record field of the [*Zoom*] tab.

Set up the meeting parameters

You can set up the base Zoom meeting parameters.
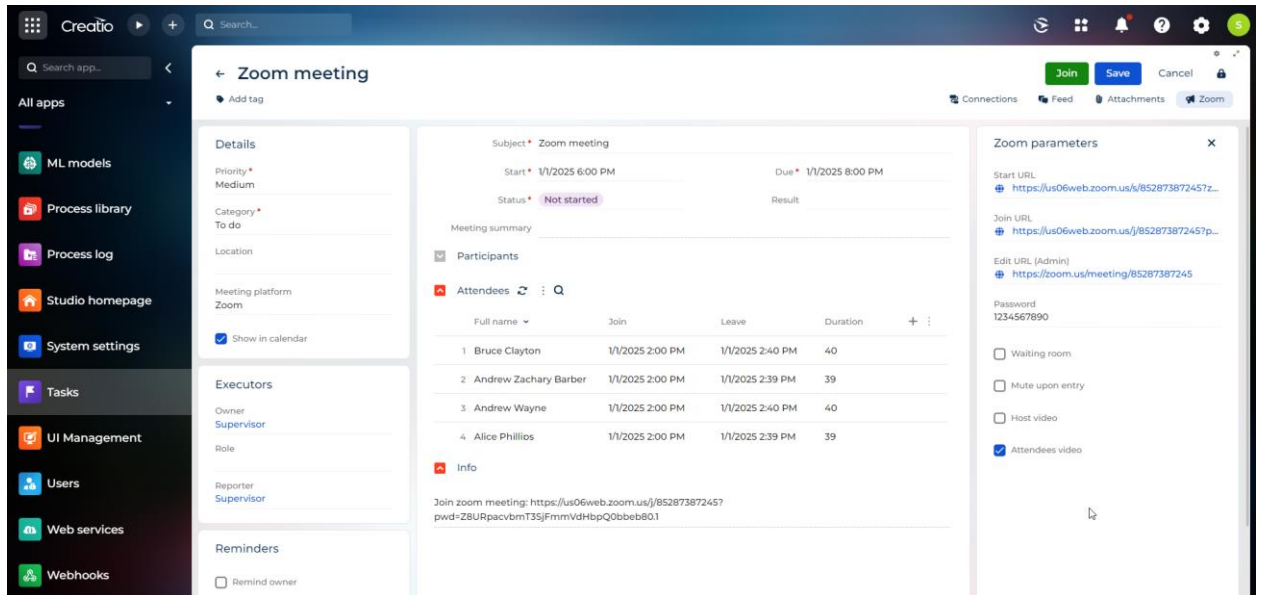
To do this, go to the [*Zoom*] tab of the activity page. View the index of editable parameters below.

Parameter	Description
Password	Meeting password that participants without an invite link must enter.
Participants video	Whether to enable the video feed of all participants automatically when they join the meeting. The participants can toggle the video feed later.
Host video	Whether to start meetings with the host's video on. The host can toggle the video feed later.
Mute upon entry	Whether to mute all participants automatically when they join the meeting. The participants can toggle the audio feed later.
Waiting room	How to let participants into the meeting. The host can admit attendees one by one, or hold all attendees in the Waiting Room and admit them all at once.
Auto recording in cloud	Whether to start local or cloud recording automatically when the meeting starts.

Meeting parameters are bound to the corresponding system settings. You can change the default parameter values by editing the settings.
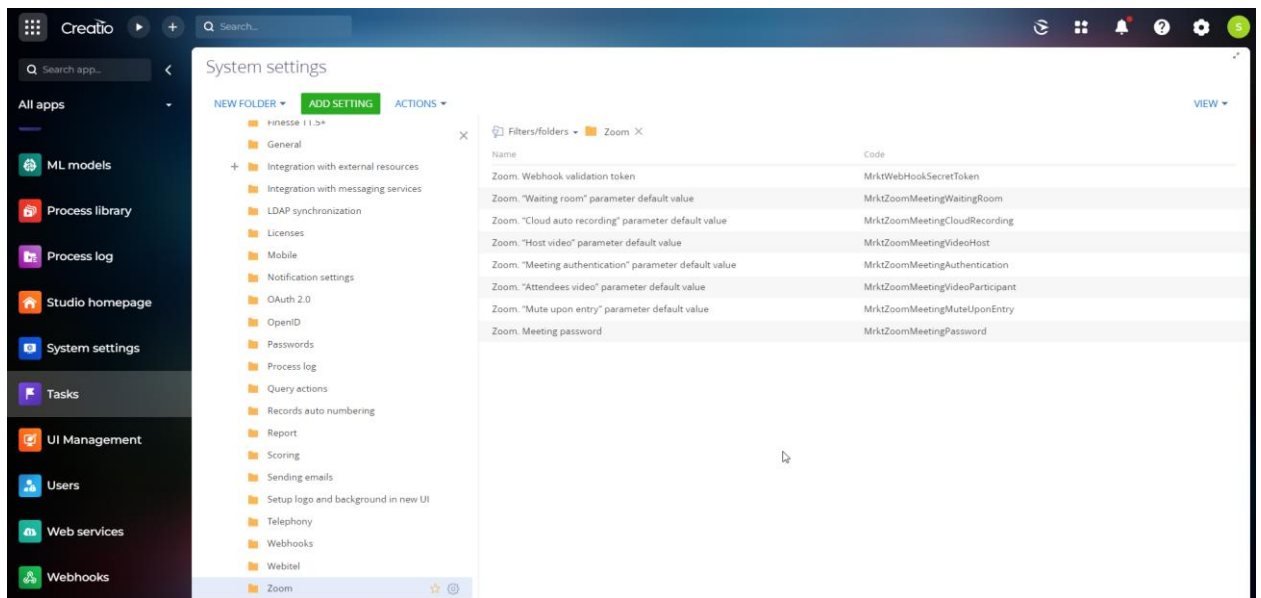
Import the attendee index and transcript after the meeting ends

After the meeting ends, you can import the index of attendees to Creatio.
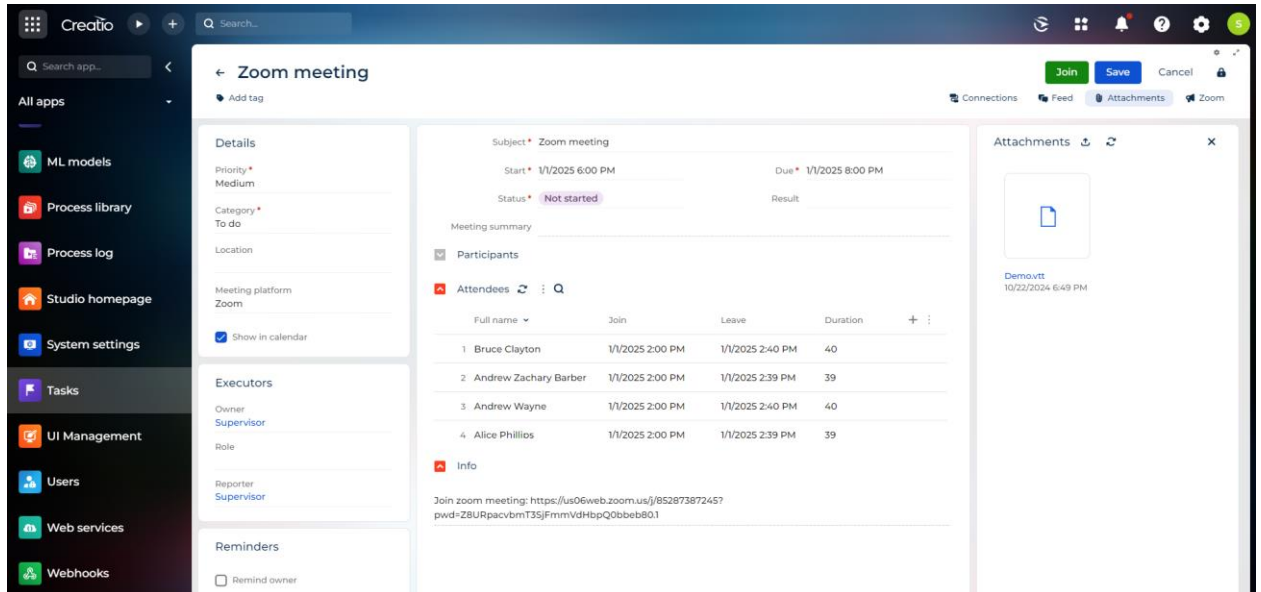
After Zoom processes the meeting attachments, Creatio will add transcript *.VTT file to the "Attachments" tab.

Attention. Zoom Transcript is available only for Zoom users that have a paid license of any grade.