

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 send email invitations to the meeting participants to remind them of the scheduled meeting.

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.
- Send email invitations to meeting participants.
- Transfer the index of attendees from Zoom to Creatio after the meeting ends.
- Create Zoom meetings from business processes.

Install the app

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

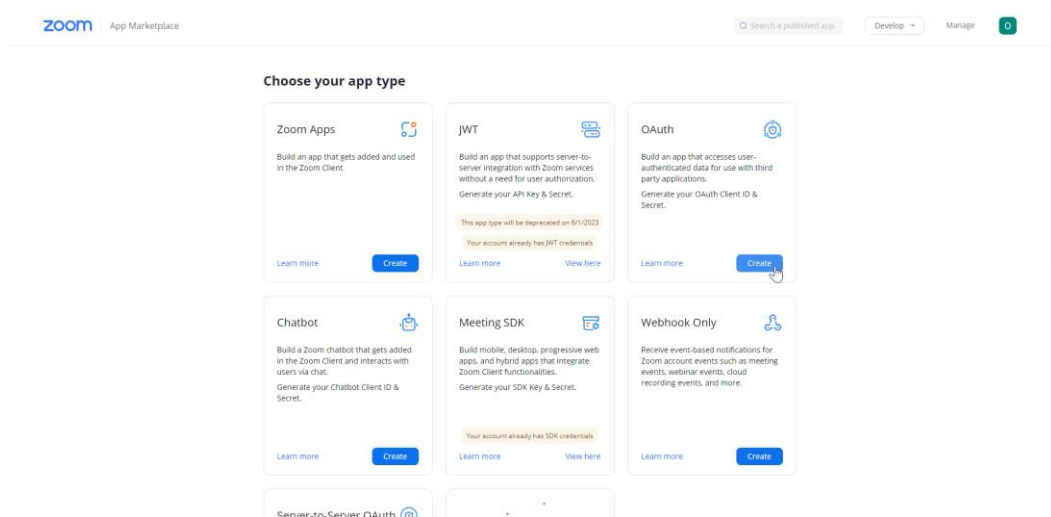
If you use Creatio on-site, make sure that Creatio can access the Internet. To do this:

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

1. Open the Zoom App Marketplace: <https://marketplace.zoom.us/develop/create>
2. Click [*Create*] in the [*OAuth*] block.



3. Enter an arbitrary name of the integration in the [*Name*] field. For example, "Creatio app."
4. Select "*Account-level app.*"
5. Make sure the app will not be published on Zoom App Marketplace.
6. Enter the redirect URL of the Zoom connector in the [*Redirect URL for OAuth*] field. Use the following format:
<https://sitename.domain.com/0/rest/OAuthFlow/OauthCallbackHandler/ZoomOAuthProvider>
7. The similar URL enter in the [Add allow list] field.
8. Go to the [*Scopes*] tab and click on the [Add Scopes] button.
9. Select and apply the following scopes:

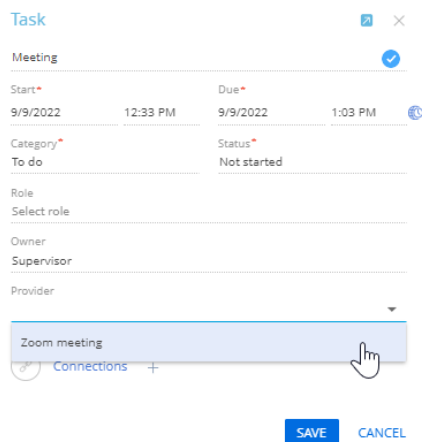
Scopes	
● Activation	
Scope Name / ID	
View and manage sub account's user meetings /meeting:master  Describe how your app intends to use this particular scope	Delete
View all user meetings /meeting:read:admin  Describe how your app intends to use this particular scope	Delete
View and manage all user meetings /meeting:write:admin  Describe how your app intends to use this particular scope	Delete
This scope allows an app to view an account's users' local recording meeting token information /meeting_token:read:admin:local_recording  Describe how your app intends to use this particular scope	Delete
View and manage all user recordings /recording:write:admin  Describe how your app intends to use this particular scope	Delete
View report data /report:read:admin  Describe how your app intends to use this particular scope	Delete

10. Save the "Client ID" and "Client secret" values on the current page.
11. Follow the instructions in the Creatio documentation: [Set up a new OAuth 2.0 application](#). Fill out the [*Client Id*] and [*Client secret*] fields with the "Client ID" and "Client secret" values, respectively.
12. Return to the Zoom App settings → [*Continue*] → follow the instructions until the end.
13. Click  to open the System Designer.
14. Go to the [*Import and integration*] block → [*Connect to Zoom*] and follow the instructions until the end.

Create a Zoom meeting from Creatio

Note. You can create a meeting from an activity only if you connect a Zoom account to Creatio.

1. Open the [*Activities*] section.
2. Click [*New task*]. This opens a window.
3. Fill out the required fields and select "Zoom meeting" in the [*Meeting provider*] field:



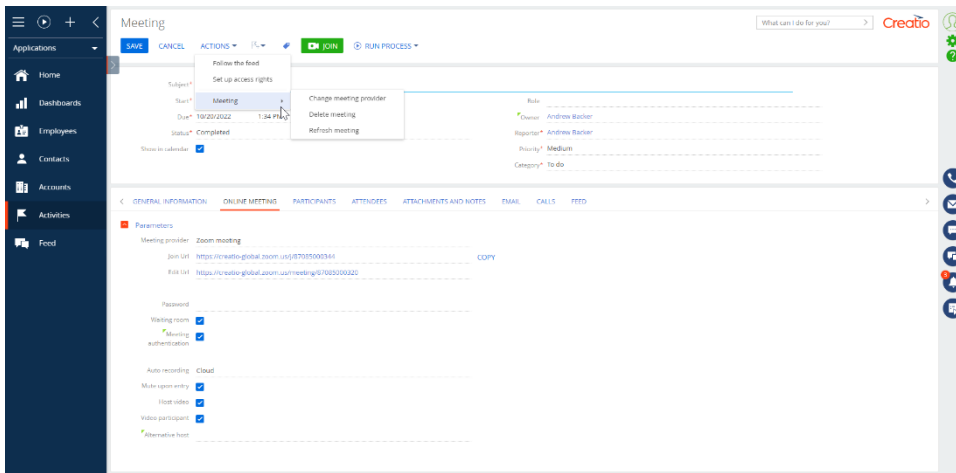
The screenshot shows a 'Task' form window with a 'Meeting' section. The 'Start' field is set to 9/9/2022 12:33 PM and the 'Due' field is set to 9/9/2022 1:03 PM. The 'Category' is 'To do' and the 'Status' is 'Not started'. The 'Provider' dropdown menu is open, showing 'Zoom meeting' as the selected option. Below the dropdown are 'SAVE' and 'CANCEL' buttons.

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 [*Online meeting*] tab.

Note. If your calendar is synchronized with an Exchange server, you can edit all activities transferred to Zoom in Creatio, Outlook, and Zoom simultaneously.

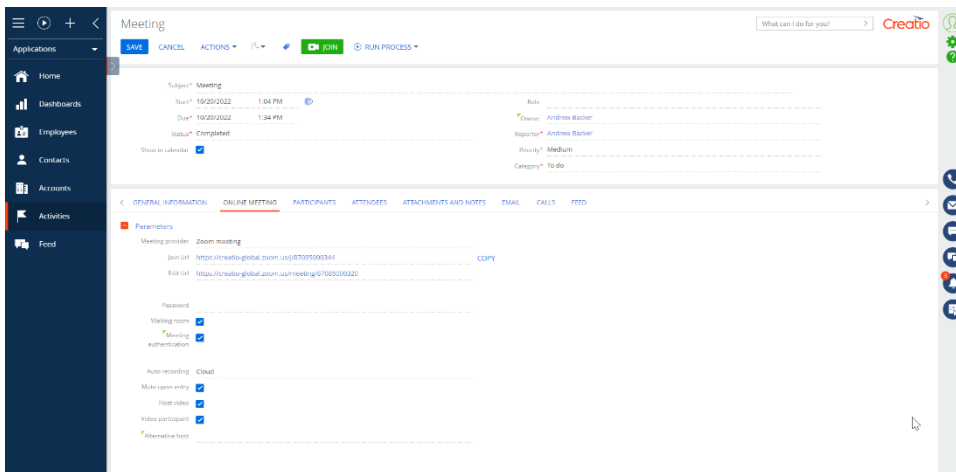
If you need to link an existing activity to Zoom, click [*Create meeting*] in the [*Actions*] button menu.

You can also change the meeting provider or delete a Zoom meeting without deleting the activity record, or refresh the meeting in Creatio if you updated the meeting directly in Zoom. To do this, run the corresponding action in the [*Meeting*] action group of the [*Actions*] button menu.



Set up the meeting parameters

You can set up the base Zoom meeting parameters.

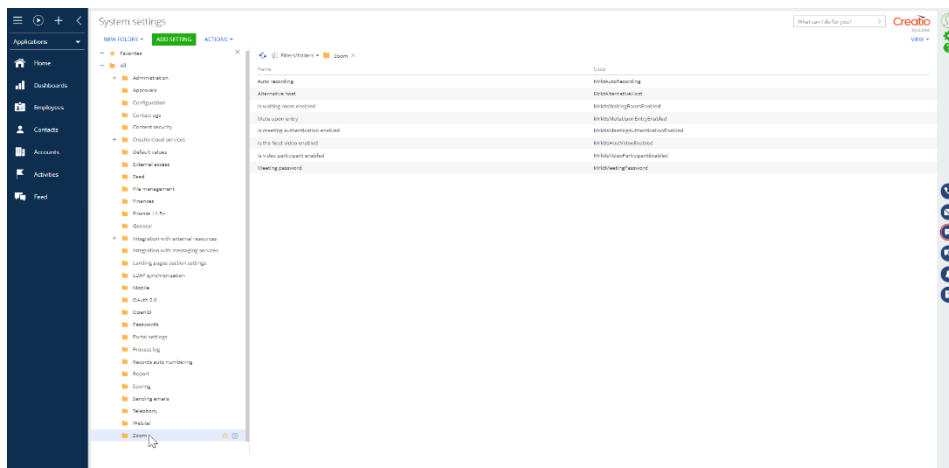


To do this, go to the [*Online Meeting*] tab of the activity page. View the index of editable parameters below.

Parameter	Description
Online Meeting Platform	Meeting provider name
Join URL	Meeting connection link
Alternative host	Another licensed Creatio user on the same account that can start the meeting on the host's behalf.
Password	Meeting password that participants without an invite link must enter
Video participant	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	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.

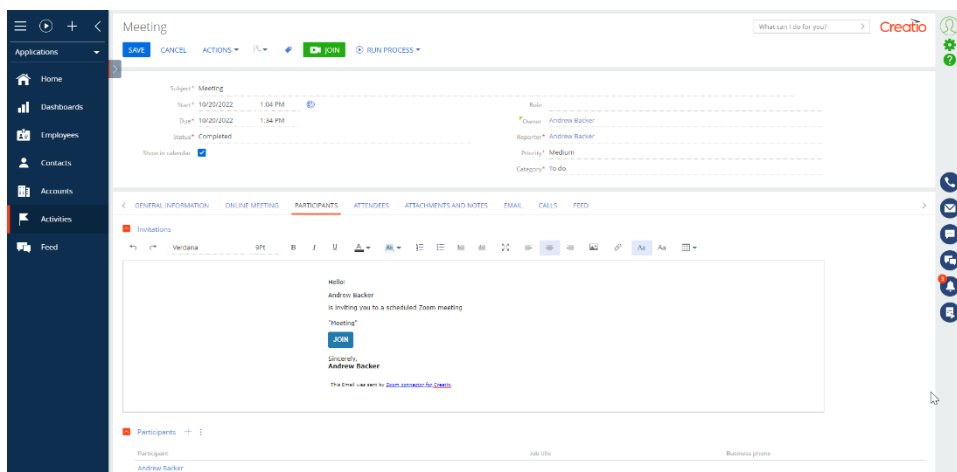


Send an invitation

You can send an email invitation that contains the meeting details to the index of participants.

If your calendar is synchronized with Exchange, follow the instructions in the user documentation to send the email: [Manage group activities](#).

Edit the email template on the [*Participants*] tab of the [*Invitations*] section if needed.

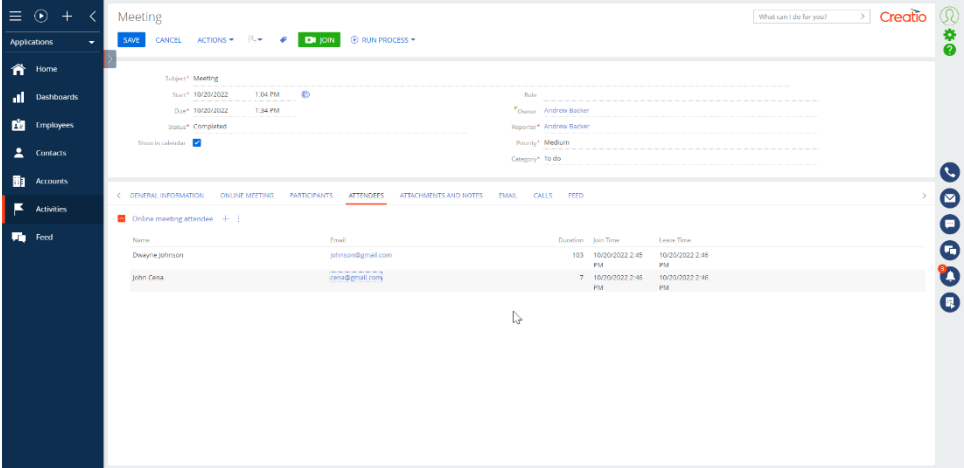


Note. You can change the default email template in the “Invitation template” (“MrktInvitationTemplate” code) system setting.

If your calendar is not synchronized, you can create a business process that sends invitation emails using the [*Send email*] process [element](#).

Import the attendee index and attachments after the meeting ends

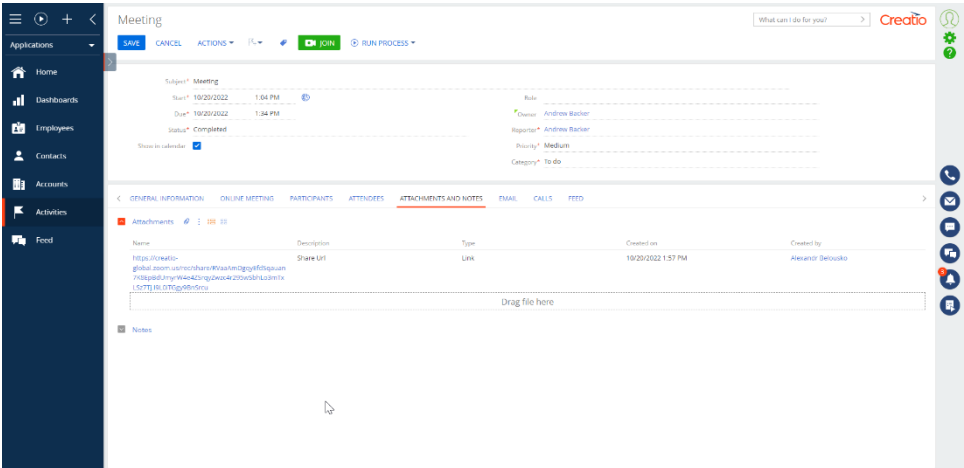
After the meeting ends, you can import the index of attendees to Creatio.



The "Check post meeting assets available" business process starts automatically if the activity result is updated with a positive value.

You can use the imported records in custom business processes, for example, to create new contacts or leads.

After Zoom processes the meeting attachments, Creatio will add links to them to the "Attachments and Notes" tab.

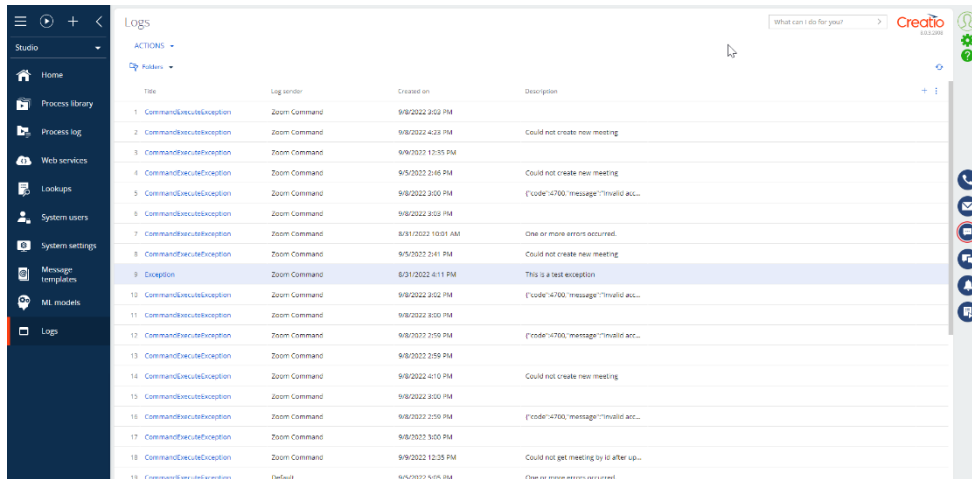


If you need to import attachments manually, run the business process directly from the activity page.

Attention. By default, Zoom stores the meeting record for 28 days before deletion.

Notifier

Zoom connector for Creatio also includes the Notifier app. System administrators can use the app to troubleshoot Zoom connector for Creatio or any other app that uses Creatio Meeting Platform.



Title	Log sender	Created on	Description
1 CommandExecutedException	Zoom Command	9/9/2022 2:02 PM	
2 CommandExecutedException	Zoom Command	9/8/2022 4:28 PM	Could not create new meeting
3 CommandExecutedException	Zoom Command	9/9/2022 12:55 PM	
4 CommandExecutedException	Zoom Command	9/5/2022 2:46 PM	Could not create new meeting
5 CommandExecutedException	Zoom Command	9/9/2022 2:00 PM	(code="4700",message="Invalid acc...
6 CommandExecutedException	Zoom Command	9/9/2022 2:09 PM	
7 CommandExecutedException	Zoom Command	8/31/2022 10:04 AM	One or more errors occurred.
8 CommandExecutedException	Zoom Command	9/5/2022 2:41 PM	Could not create new meeting
9 Exception	Zoom Command	8/31/2022 4:11 PM	This is a test exception
10 CommandExecutedException	Zoom Command	9/9/2022 2:02 PM	(code="4700",message="Invalid acc...
11 CommandExecutedException	Zoom Command	9/8/2022 2:00 PM	
12 CommandExecutedException	Zoom Command	9/8/2022 2:00 PM	(code="4700",message="Invalid acc...
13 CommandExecutedException	Zoom Command	9/8/2022 2:59 PM	
14 CommandExecutedException	Zoom Command	9/9/2022 4:10 PM	Could not create new meeting
15 CommandExecutedException	Zoom Command	9/9/2022 2:00 PM	
16 CommandExecutedException	Zoom Command	9/8/2022 2:00 PM	(code="4700",message="Invalid acc...
17 CommandExecutedException	Zoom Command	9/8/2022 3:00 PM	
18 CommandExecutedException	Zoom Command	9/9/2022 12:35 PM	Could not get meeting by id after up...
19 CommandExecutedException	Default	9/5/2022 3:05 PM	One or more errors occurred.