Zoom Meeting Scheduler

Installation & User Guide

Zoom Meeting Scheduler – Overview

This integration lets you **create Zoom meetings directly from Salesforce**. It helps users quickly set up meetings without leaving Salesforce and also keeps a record of each meeting.

1. **Create Zoom Meetings from Salesforce**
   - You can create two types of Zoom meetings:
     - **Instant Meeting** – starts right away.
     - **Scheduled Meeting** – set for a future date and time.
2. **Store Meeting Details in Salesforce**
   - Each meeting you create is saved in Salesforce.
   - Saved details include:
     - Meeting ID
     - Topic (name of the meeting)
     - Start time and duration
     - Meeting link (Join URL)
3. **User-Friendly Interface**
   - A form lets users enter meeting details like topic, time, and participant emails.
   - A calendar view shows upcoming meetings.
   - You can click a button to **join the meeting directly** from Salesforce.
4. **Extra Features**
   - Automatically sends meeting invites to participants.
   - Option to join meetings inside Salesforce using Zoom SDK (if needed).
   - Admin can decide which person create meeting in zoom and which not.

Some useful links: -

1.   Zoom Market Palace

Zoho API Console - https://marketplace.zoom.us/
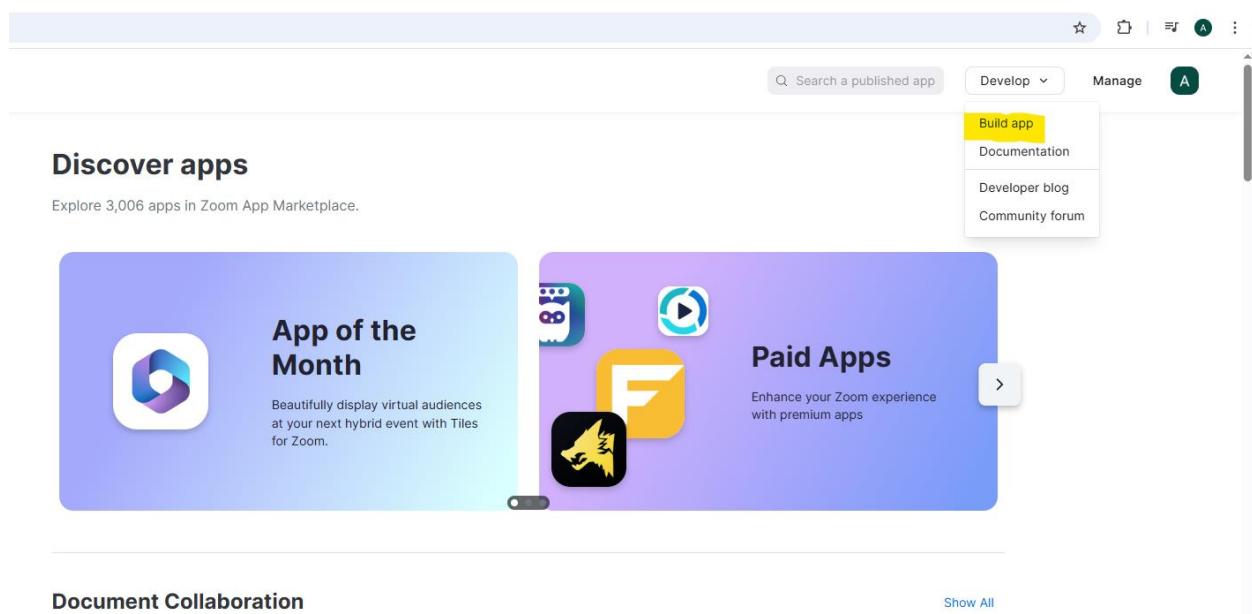
2.   Zoom Meeting API Docs for Create Meeting

- https://developers.zoom.us/docs/api/rest/reference/zoom-api/methods/#operation/meetingCreate

Create Account in Zoom Market Palace:-

Click on link which I gave in above steps

When you create an account in Zoom market palace after click on *'Build app'* and create your app in Zoom

We create '*General App*' so click on General App and then click on create button.

Basic Information

Provide information about your app. Learn more

Select how the app is managed

This may affect Features, Scopes, and permissions to add the app.

🔘 Admin-managed

Account admins can add and manage this app. It can access and manage users' data depending on the scope selection.

Then click on '*Admin-managed*' and then click on '*Save*' button.

And After that fill basic details….

OAuth Information (Development)

Provide the URL that the users will be redirected to, after successfully authorizing the app. URLs added here improve the OAuth redirect security as the app will only be allowed to redirect to those URLs. Learn More

OAuth Redirect URL

Provide the development redirect URL to generate an authorization URL for development testing.

> e.g. https://yourcompany.com/redirect

☐ **Use Strict Mode for Redirect URLs**

This option only allows the redirections that exactly match the valid OAuth redirect URLs.

☐ **Subdomain Check**

This is for security check that can prohibit others from tampering with the redirected URLs. This option only allows the redirections that exactly match the subdomain of the valid OAuth redirect URLs.

OAuth Allow Lists

> https://yourcompany.com/allowlist

+ **Add Allow List**

For now don't fill these details and click on '*Continue'* button.

Again Click Continue.

Select '*Meetings*' on this page and click on continue button.

Embed Meeting SDK and bring Zoom features to your app.

Use Device OAuth

This feature allows your users to authorize and log in to your app on selected devices with a code or a URL.

| Android | iOS | Web | Windows | Windows(c#) | macOS | Electron | Linux | Unreal Engine | React Native |

Android   View Document

v6.5.1.31081 [Latest]

                                   ↓ Download   📄 View Release Note

v6.5.0.30984

v6.4.10.30380

v6.4.5.29521

v6.4.3.28970

v6.4.1.28710

v6.4.0.28560

v6.3.10.27979

← Back   Continue →

Click on *'Continue'* button.

Connect

Authenticate third-party applications and integrate data into your Zoom app.

API spec   Base URL & authentication   Endpoints

API spec (Optional)

Upload your API spec to enter all required connector fields instantaneously.

File upload

Supported file types are JSON, YAML and YML in OpenAPI OAS3.0 format.

Drag and drop files or

Choose Files

← Back   Continue →

Click on *'Continue'* button.

Now add these scopes in scope section for create meeting.

Meeting

View all user meeting summaries

meeting:read:list_summaries:admin	View a meeting's summaries	☐	🗑

View and manage all user meetings

meeting:update:meeting:admin	Update a meeting	☐	🗑
meeting:write:batch_polls:admin	Create polls for a meeting	☐	🗑
meeting:write:poll:admin	Create a poll for a meeting	☐	🗑
meeting:write:registrant:admin	Add a registrant to a meeting	☐	🗑
meeting:delete:meeting:admin	Delete a meeting	☐	🗑
meeting:update:poll:admin	Update a meeting's poll	☐	🗑
meeting:write:invite_links:admin	Create invite links for a meeting	☐	🗑
meeting:write:meeting:admin	Create a meeting for a user	☐	🗑
meeting:write:batch_registrants:admin	Add registrants to a meeting	☐	🗑

Scope Description

← Back   Continue →

And click 'Continue' and 'Continue' then Page redirect on Basic Information Page because we have not given these details in starting.

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OAuth Allow Lists

> https://yourcompany.com/allowlist   🗑

⚠ This field cannot be empty

＋ Add Allow List

So, now we fill these details first. And for this we need to create *'Auth. Providers'* in salesforce.

- Click on Set Up.
- Search *'Auth. Providers'* in Quick Find box.

Click on '*New*' Button.

Select '*Open ID Connect'* in Auth. Providers.

And then fill these details:-

SETUP
Auth. Providers

Auth. Provider

Auth. Provider Edit		Save	Save & New	Cancel

Provider Type	Open ID Connect
Name	SalesforceZoomConnect
URL Suffix	SalesforceZoomConnect
Consumer Key	ppMx4D3bSiWY_uw1eABK(
Consumer Secret	3Lal10HexBs0Ij28x3AMuEm
Authorize Endpoint URL	https://zoom.us/oauth/authorize
Token Endpoint URL	https://zoom.us/oauth/token
User Info Endpoint URL	
Use Proof Key for Code Exchange (PKCE) Extension	☑ i
Token Issuer	
Default Scopes	
Send access token in header	☑ i
Include Consumer Secret in SOAP API Responses	☑ i
Custom Error URL	
Custom Logout URL	
Registration Handler Type	--None--
Portal	--None--
Icon URL	
Use Salesforce MFA for this SSO Provider	☐ i

Send client credentials in header ☐ i

Choose one of our sample icons

Save	Save & New	Cancel

Add *'Consumer Key'* and '*Consumer Secret'* from your app which we create in zoom market palace.

Then click on save button.

Salesforce Configuration

Test-Only Initialization URL	https://xapdigitaldevhuborg-dev-ed.develop.my.salesforce.com/services/auth/test/SalesforceZoomConnect
OAuth-Only Initialization URL	https://xapdigitaldevhuborg-dev-ed.develop.my.salesforce.com/services/auth/oauth/SalesforceZoomConnect
Callback URL	https://xapdigitaldevhuborg-dev-ed.develop.my.salesforce.com/services/authcallback/SalesforceZoomConnect
Single Logout URL	https://xapdigitaldevhuborg-dev-ed.develop.my.salesforce.com/services/auth/rp/oidc/logout

Edit	Delete	Clone

Then you got these URL copy *'Callback URL'* and paste in Zoom market palace which we leave with blank details. In OAuth Redirect URL.

OAuth Information (Development)

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OAuth Redirect URL

Provide the development redirect URL to generate an authorization URL for development testing.

```
e.g. https://yourcompany.com/redirect
```

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OAuth Allow Lists

```
https://yourcompany.com/allowlist
```
🗑

⚠ This field cannot be empty

＋ Add Allow List

Now we need to create '*New legacy*' In *'Named Credentials'* in Salesforce
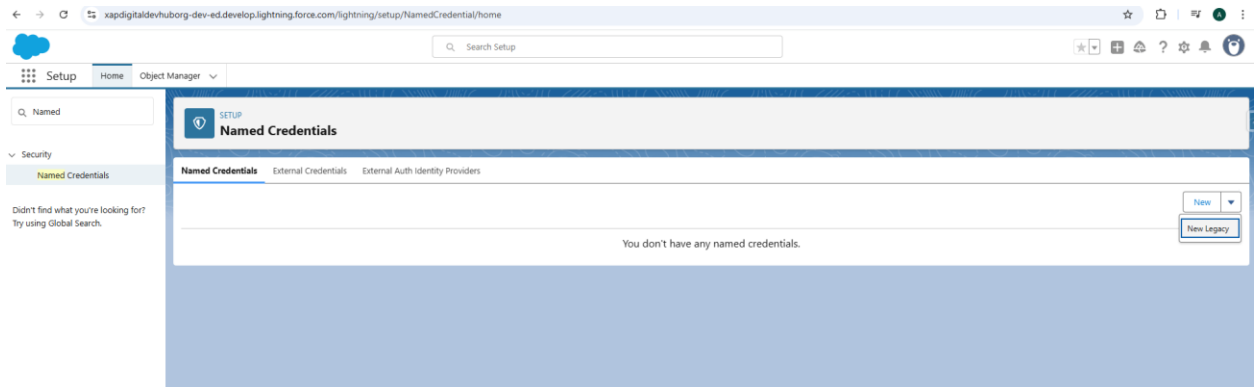
Click on 'New Legacy' button.

URL- https://api.zoom.us

Create with Same details as you can see above. And click on save button.

After clicking on *'Save'* button one new page is launch.

General app 865 would like permission to:

✓ View a user's meetings

✓ Delete, Create a meeting

✓ View a past meeting's instances

✓ Create a meeting template from an existing meeting

✓ View a past meeting's participants

✓ View a meeting's alert

✓ Create polls for a meeting

✓ View a meeting's device test result

✓ View a meeting's summary

✓ View a meeting's participant

✓ View a meeting's invitation

✓ Create invite links for a meeting

✓ View a meeting's summaries

✓ View a meeting's chat message

Types of data General app 865 will access:

By clicking Allow, you give permission to this app to use your information in accordance. You can remove this app at any time in **My apps.**
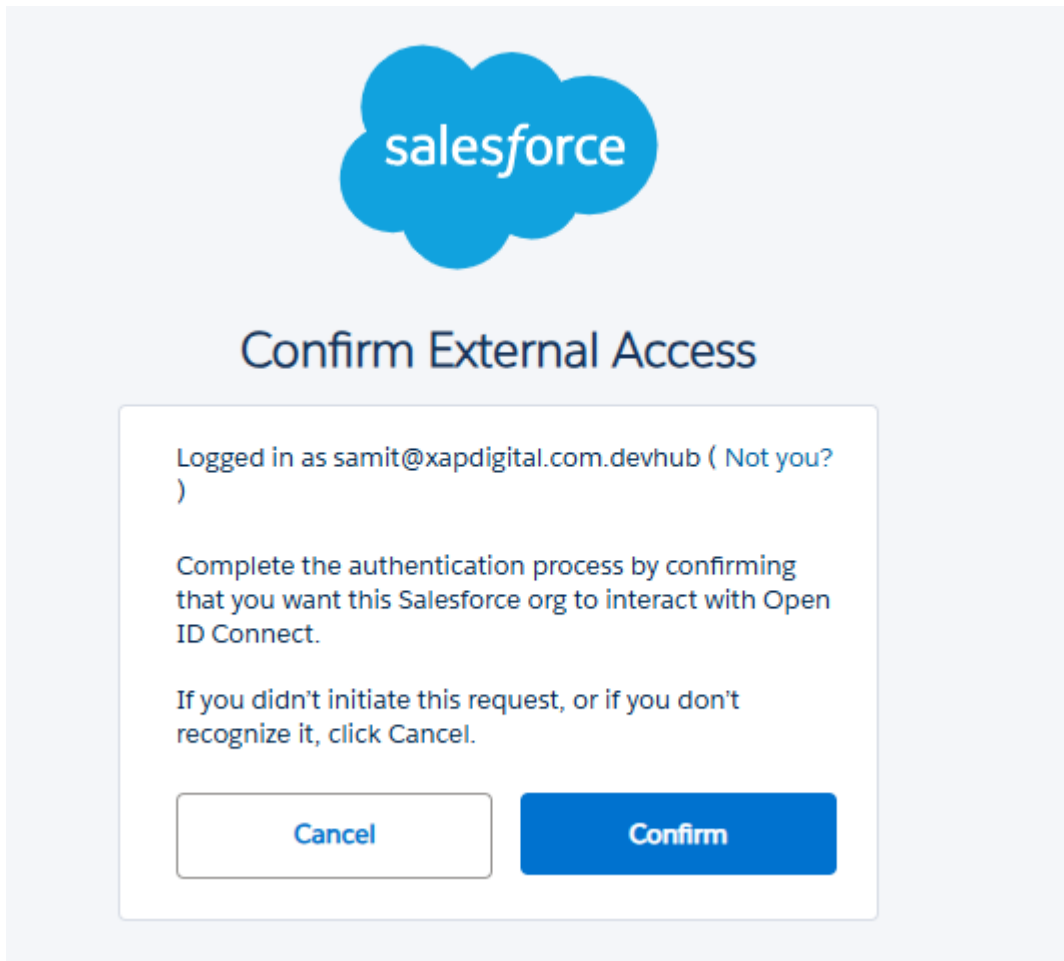
Allow   Decline

Click on Allow for all permissions.

And confirm for this.

INSTALLATION STEPS FOR GENERATE SALES ORDER IN ZOHO BOOKS APP

- Use these links to install the package into any organization:
  - Production Environment - <u>Download for Production</u>
  - Sandbox Environment – <u>Download for Sandbox</u>

- Select one of the installation options as shown below and click on "**Install**" button

Install Zoom Meeting Scheduler
By www.xapdigital.com

Install for Admins Only

◉ Install for All Users

Install for Specific Profiles...

⚠ You're installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program. ⓘ

☑ I acknowledge that I'm installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

[Install] [Cancel]

App Name	Publisher	Version Name	Version Number
Zoom Meeting Scheduler	www.xapdigital.com	ver 2.0.0	2.0

Description
Fresh new version

Additional Details   View Components

Click on App Launcher and Search App 'Zoom Meeting Scheduler'

Install Zoom Meeting Scheduler
By www.xapdigital.com

Installing and granting access to all Users...

App Name	Publisher	Version Name	Version Number
Zoom Meeting Scheduler	www.xapdigital.com	ver 2.0.0	2.0

Description

Fresh new version

Additional Details   View Components

Install Zoom Meeting Scheduler
By www.xapdigital.com

Installation Complete!

Done

App Name	Publisher	Version Name	Version Number
Zoom Meeting Scheduler	www.xapdigital.com	ver 2.0.0	2.0

Description

Fresh new version

After installing the application, we need to do some post deployment things like- Set Page Layout (Add fields in Page Layout), Add members in permission set or give FLS permissions on profile.

Open Meetings Layout ▾

Save ▾ | Quick Save | Preview As... ▾ | Cancel | Undo | Redo | Layout Properties

Fields			
Buttons			
Quick Actions			
Mobile & Lightning Actions			
Expanded Lookups			
Related Lists			
Report Charts			

Quick Find | Field Name

Section	Host Email	Meeting Type	Zoom Meetings Topic
Blank Space	Last Modified By	Meeting URL	
Created By	Meeting ID	Owner	
Duration	Meeting Time	Participant Email...	

We are created two permission set one for **Read** access and other for **Write** access.

1. Zoom Meeting Permission Set – This permission set create for write when you assign this permission set for users after they can create meeting in zoom and modify salesforce data records.
2. Zoom Meeting Permission Set Read Only – This permission set give only read user can view only all records and only join meetings which meetings shows on calendar.

Note - Make sure when you installed app check if user is able to see button and have write access or able to create meeting in zoom from salesforce. If yes, then remove custom permission from profile and assign valid permission set.

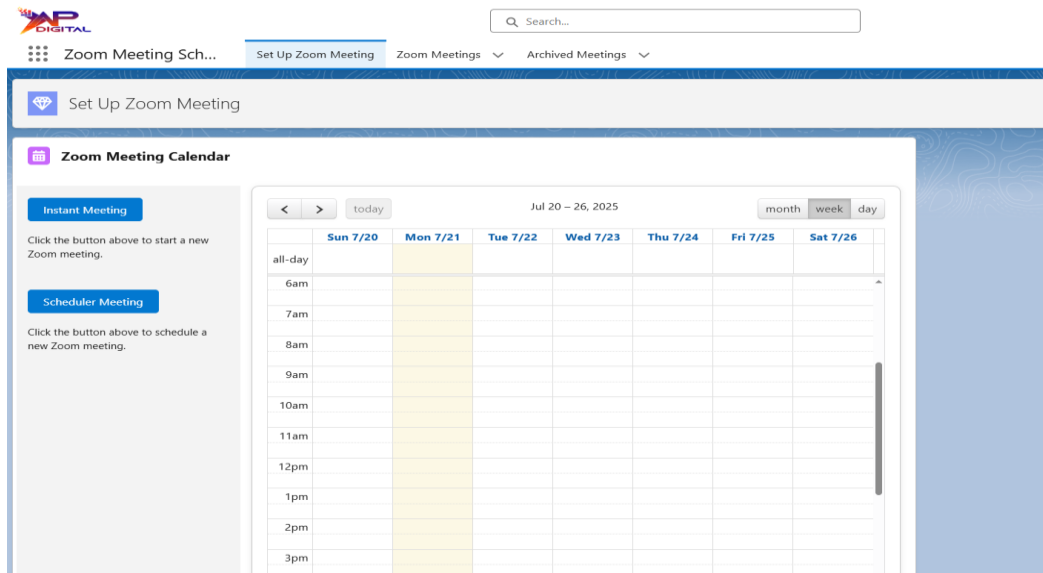## Now we discuss how functionality is working…!!!

- Click on 'App Launcher'
- Search 'Zoom Meeting Scheduler' and click on this.

UI looking like this…

- We have two buttons on screen –

- Instant Meeting – If you want to start instant meeting with participant then click on this and fill all details. And click on 'Start Meeting' button.
When you click on 'Start Meeting' then notification email is sent to participant and you redirect on Zoom meeting page then login with your host email.

Create Zoom Meeting

Topic

Time Zone

Select Time Zone ▼

Participant Emails (comma-separated)

Cancel   **Start Meeting**

- Scheduler Meeting – If you want to schedule meeting any future specific date or time, so click on this button.

Create Zoom Meeting

Topic

Start Time

Date

Time

Duration

Select Duration

Time Zone

Select Time Zone

Participant Emails (comma-separated)

Cancel   Save

Fill all details and click on save button.

After clicking on save button meeting create in Zoom. And same meeting you can check on calendar and Salesforce object (open meetings).

- Same meeting you can create from calendar except click on 'Scheduler Meeting' button. Click on calendar UI same interface are open then fill your details and click on 'Save' button.

- After creating the meeting calendar UI looking like this.

- If you want to join this meeting or check meeting details then click on meeting which are showing on calendar.

Meeting Details

Meeting ID: 89523122529
Topic: Hello welcome call
Start Time: 21 Jul 2025, 02:30 pm GMT-4
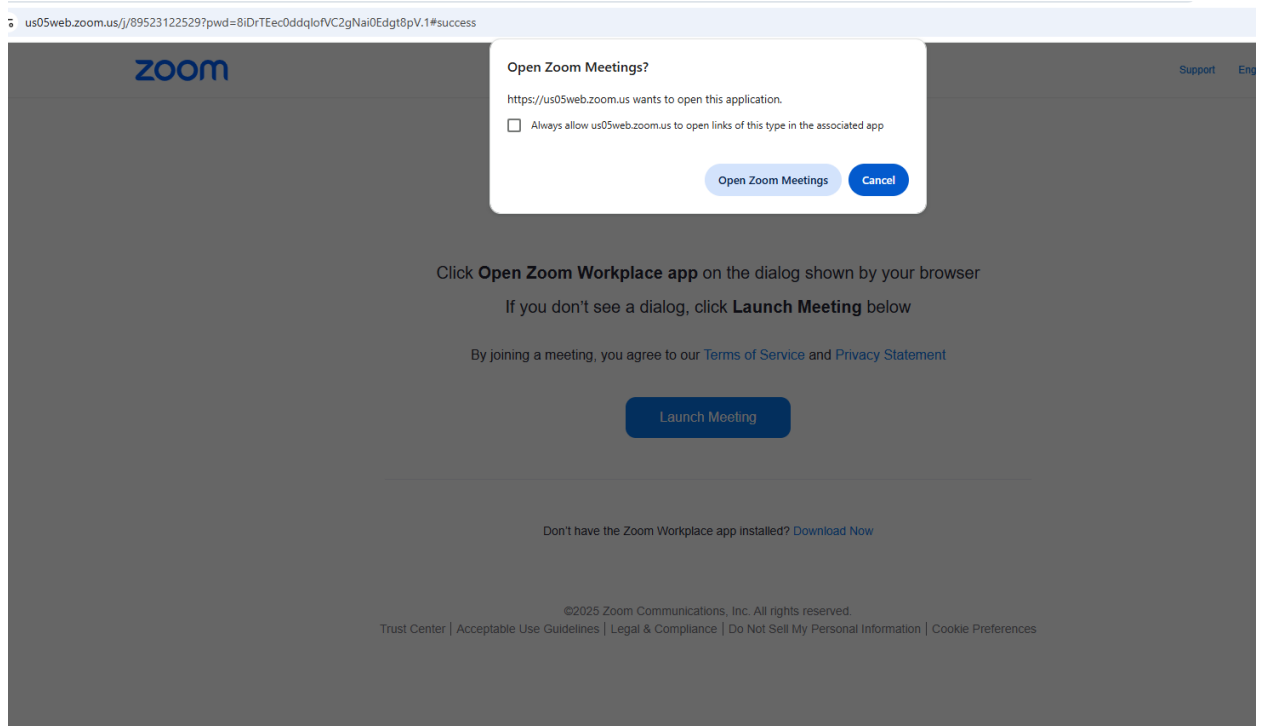
Join URL:

Join Meeting

Close

• When you click on 'Join Meeting' button then you redirect on Zoom meeting page.

Set Up Zoom Meeting   Open Meetings ∨   Archived Meetings ∨

- We have three tabs
  1. Set Up Zoom Meeting – Show calendar UI for create and check zoom meeting.
  2. Open Meetings or Zoom Meetings. – Showing those records are available in Calendar UI.

Open Meetings
Recently Viewed ▼ 📌

1 item • Updated a minute ago

		Zoom Meetings Topic
1	☐	Hello welcome call

Open Meetings
Hello welcome call

Related   **Details**

Zoom Meetings Topic
Hello welcome call

Duration
60

Meeting Time
2025-07-22 00:00:00

Meeting URL
https://us05web.zoom.us/j/89523122529?
pwd=8iDrTEec0ddqlofVC2gNai0Edgt8pV.1

Meeting Type
Scheduled

Created By
Xap Digital User, 21/07/2025, 11:03 am

Owner
Xap Digital User

Meeting ID
89523122529

Participant Email IDs

Host Email
test1234@test.com

Last Modified By
Xap Digital User, 21/07/2025, 12:51 pm

3. Archived Meetings – Showing those records are deleted from Calendar UI.

- Basically for meeting archiving we are write a batch, it's deleted the meeting if start date is less than today date so for schedule this batch and we have a batch scheduler. Now we schedule batch for everyday in salesforce.

  1. Search 'Scheduled Jobs' in Quick find box.
  2. Click on this. And Click on 'Schedule Apex' button.
  3. Fill all these details. And click on save button

Save Cancel

Job Name	ZoomMeetBatchScheduler
Apex Class	ZoomMeetBatchScheduler 🔍

Schedule Using ⦿ Schedule Builder   ○ Cron Expression

Schedule Apex Execution

Frequency ⦿ Weekly
           ○ Monthly

Recurs every week on
☑ Sunday
☑ Monday
☑ Tuesday
☑ Wednesday
☑ Thursday
☑ Friday
☑ Saturday

Start	21/07/2025	[21/07/2025]
End	21/08/2025	[21/07/2025]
Preferred Start Time	9:00 am ▾	

Exact start time will depend on job queue activity.

Save Cancel

Thank You