

Add Team Agendas to Your Zoom Account

Login to Team Agendas. Once you are logged in, locate your username at the top right corner of the screen. Select the down arrow, and then click 'My Account.'

1. On the My Account page, under 'Account Settings' select 'Integrations.'
2. In the Integrations section, you will see 'Zoom Meetings'. To connect your Team Agendas account with Zoom, select the 'Connect Zoom Meetings' button.
3. Once you select this button, you will be redirected to a page that requests your authorization. Select the blue button at the bottom of the page that says 'Allow'.
4. Your connection will be finalized and you will be redirected back to the My Account page. Zoom is now connected with Team Agendas.

Use Cases

Prerequisite: Complete Zoom integration with Team Agendas (See **Installation** section of this document)

How to Create a New Meeting with a Zoom Link

1. To create a meeting within Team Agendas that has a Zoom link, first you will need to ensure that Zoom has been integrated with your account. Once this is done, logged into Team Agendas, select 'Meetings' in the navigation menu.
2. On the Meetings page, select the 'Create New Meeting' button.
3. On the Create Meeting page, fill in all of the fields to create a meeting. In the Team Assignment dropdown, select 'Zoom Test Team.'
4. If you have successfully integrated Zoom, you will see the Zoom icon and text that reads 'Zoom has been setup for your account!' If you do not see this, Zoom has not been integrated with your account. See the **Installation** section of this document.
5. To create a meeting that allows users to have access to a Zoom link for the meeting, check the box next to 'Setup Zoom Meeting'.
6. Click 'Save'. Once you have saved, you will be redirected back to the Meetings page. You can now view the Zoom link and log into the meeting a few ways.
7. First, select 'Actions' next to the meeting you just created in the 'Upcoming Meetings' box. Then, select 'Agenda'. This shows you the agenda for the meeting. At the top of the Agenda you will see a link that says 'Join Zoom Meeting.' This will allow you to enter the meeting.
8. All members of the team you selected when creating the meeting are sent an email when a new meeting is created. In the email, they will see the Zoom link and be able to join from their email, or they may log in and view the agenda and access the link that way.
9. Lastly, the admin user who created the meeting is able to view the meeting link, ID and password when editing the meeting, as is any admin user assigned the team. Logged in as an admin user, go to 'Meetings' in the navigation. On this page, find the meeting you created in the 'Upcoming Meetings' box. Select 'Actions' then 'Edit'. On this page you will see your Zoom link and meeting credentials.

Editing a Meeting with An Existing Zoom Meeting

1. To edit a meeting with an existing Zoom meeting that has been set up, log in to your Team Agendas account.
2. Go to 'Meetings' in the navigation. On this page, find the meeting you would like to edit in the 'Upcoming Meetings' box. Select 'Actions' next to the meeting name, then 'Edit.'
3. This will take you to a page that allows you to edit the meeting name, its start or end time, the assigned team, room location, or note taker. Any of these may be edited and saved without impacting the Zoom link.
4. Make any desired changes and select 'Save.' Once the changes are saved, you will be redirected back to the Meetings page. Any time a meeting is edited, all members of the assigned team will receive an email with the updated meeting. They will be able to access the Zoom link in this email, or by logging in and viewing the meeting's agenda.

Edit an Existing Meeting to Add a Zoom Meeting

1. Log in to your Team Agendas account. First you will need to ensure that you have Zoom integrated with your Team Agendas account.
2. To set up a Zoom link within an already existing meeting, select 'Meetings' in the navigation. On this page, in the 'Upcoming Meetings' box, find the meeting you would like to set up a Zoom meeting for. Next to the meeting name, select 'Actions' then 'Edit'.
3. On the Edit page, if you have successfully integrated Zoom you will see the Zoom icon and text that reads 'Zoom has been set up for your account!' If you do not see this, Zoom has not been integrated with your account, see the Installation section of this document.
4. To set up a Zoom meeting for this existing meeting, check the box that says 'Setup Zoom Meeting.' Select 'Save'. Your meeting has now been saved with a Zoom meeting set up, and you will be redirected back to the Meetings page.
5. You can now view the Zoom link and log into the Zoom meeting a few ways. First, select 'Actions' next to the meeting you just created in the 'Upcoming Meetings' box. Then, select 'Agenda'. This shows you the agenda for the meeting. At the top of the Agenda you will see a link that says 'Join Zoom Meeting.' This will allow you to enter the meeting.
6. All members of the team you selected when creating the meeting are sent an email when a new meeting is created. In the email, they will see the Zoom link and be able to join from their email, or they may log in and view the agenda and access the link that way,
7. Lastly, the user who created the meeting is able to view the meeting link, ID and password when editing the meeting. Go to 'Meetings' in the navigation. On this page, find the meeting you created in the 'Upcoming Meetings' box. Select 'Actions' then 'Edit'. On this page you will see your Zoom link and meeting credentials.

Remove Zoom Meeting for an Existing Meeting

1. To remove a Zoom link for an existing meeting, first log in to your Team Agendas account.
2. Select 'Meetings' in the navigation. On this page, find the meeting you would like to edit in the 'Upcoming Meetings' box.
3. Once you find the meeting you would like to edit, select 'Actions' and 'Edit'. The Edit page will allow you to remove the Zoom link from your meeting.
4. You will see the Zoom icon and a checkbox that says 'Remove Zoom Meeting.' To remove the Zoom meeting link, check this box, and select 'Save.' This will redirect you back to the Meetings page.
5. Now you will no longer be able to see the Join Zoom Meeting link on this meeting's Agenda. In addition, all members of the team assigned to this meeting will receive an email notification that the meeting has been updated, but the email will no longer contain the zoom link.

Remove Team Agendas from Your Zoom Account

To uninstall Team Agendas from your Zoom account, first you will need to remove it from the Integration page in Team Agendas. To start, log in to your Team Agendas account.

1. Once logged in, locate your username in the top right corner of the screen. Select the down arrow, then select 'My Account.'
2. On the My Account page, select the 'Integrations' option. On this page you will see a button that says 'Disconnect Zoom Meetings'. Click this button. Team Agendas and Zoom are now disconnected.
3. To uninstall Team Agendas from your Zoom account, login to your Zoom account and navigate to the Zoom App Marketplace.
4. Click Manage > Installed Apps, or search for the Team Agendas app.
5. Select the Team Agendas App.
6. Select 'Uninstall'.