



Zoom integration in bmbly CRM

1. How to connect my Zoom account in bmbly CRM?

First, go to “users” settings in the upper toolbar, by clicking the “gear” icon:

The screenshot shows the bmbly CRM interface. In the top right corner, there is a search bar and several utility icons. A red arrow points to a gear icon, which is the settings menu. The main content area is divided into several sections: 'Current Status' with a table of 'Income Leads', 'Tasks' with a list of 'Uncompleted Tasks', a 'Leads Graph' showing 'Total Leads' and 'Unique Leads' over time, and a 'Media Report' table with a corresponding pie chart.

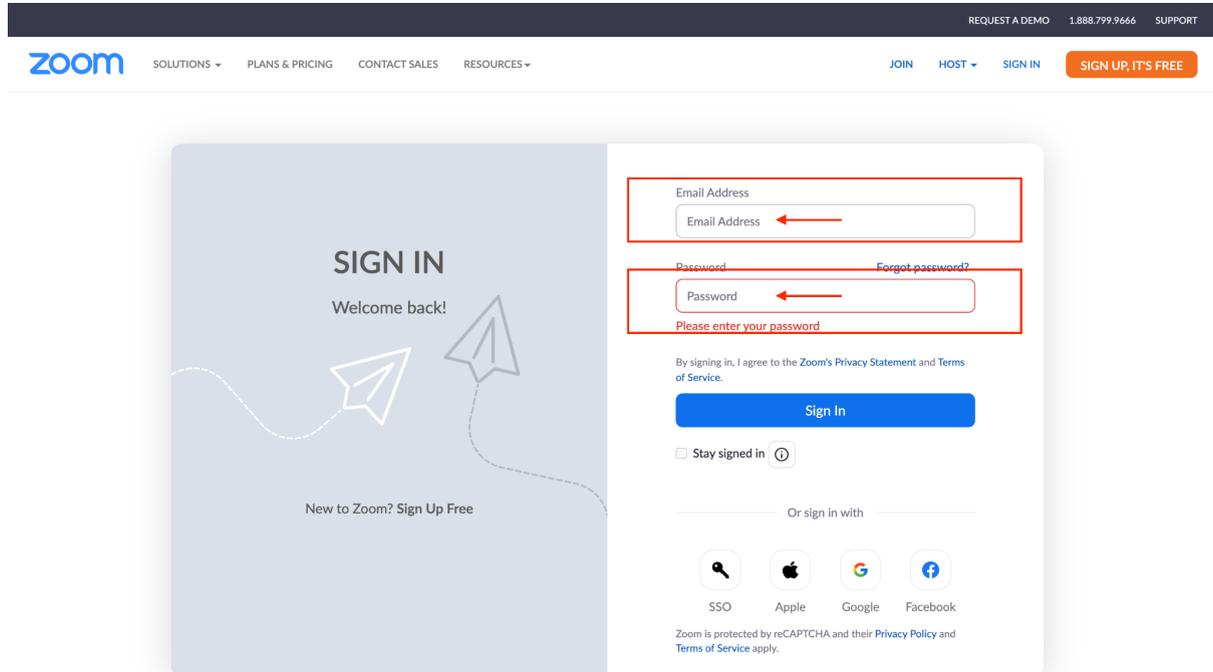
Then, in the personal accounts setting click on Zoom “connect” icon:

The screenshot shows the 'My Details' settings page. It includes sections for 'My Details', 'Blocking Of Users', 'Google Account', and 'Sales Companies'. The 'Google Account' section is highlighted with a red box and contains the following information:

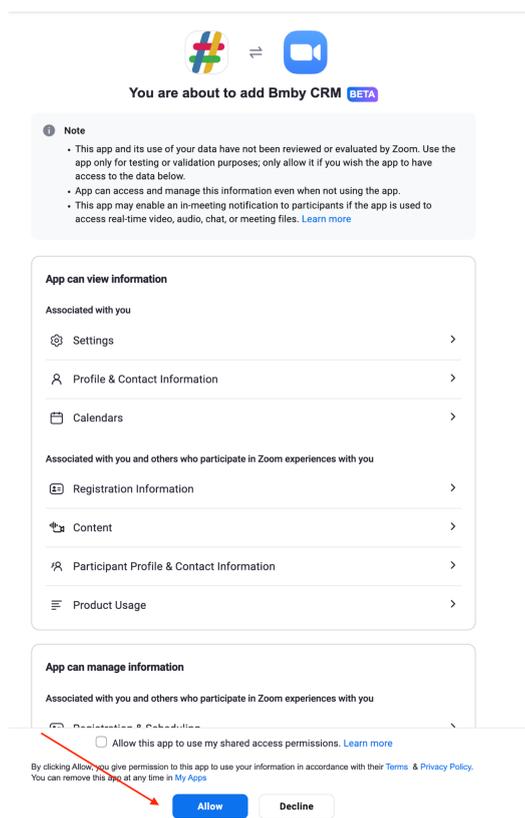
Account Type	Status	Description	Action
Choose account to sync Google Calendar	31	You can synchronize appointments and tasks with Google Calendar by simple connection to your Google Account. The synchronization is two-way, you break that connection at any time.	Sign in with Google
Choose account to sync 365 Calendar	0	Sync appointments and tasks with Outlook 365. You can disconnect this link at any time.	[Edit]
Zoom	Not connect to zoom		[Connect]
Tasks to Client	Not Defined.		[Edit]



after clicking, a new web page window opens, log in with your personal Zoom username and password in order to log-in:



Once you successfully logged in special note will ask you to give permissions to bmby crm app, please “allow” this in order to successfully integrate Zoom in bmby:





Upon the approval, the Zoom app marketplace will close automatically and you'll see now that the Zoom app is now connected to bmby:

✓ Zoom	Connected to zoom	[disconnect]
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In any time, you can disconnect your Zoom account from bmby crm account by clicking on the “disconnect” link in the “users” section:

✓ Zoom	Connected to zoom	[disconnect]
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2. How to create a Zoom meeting from bmby CRM?

Click on the “plus” icon in order to add appointment :

The screenshot shows the bmby CRM dashboard. At the top, there's a search bar and a 'plus' icon. Below it, there are several summary cards: 'Monthly leads 120', 'Monthly sales opportunities 1,002,122 (33)', 'Monthly sales 394,098 (39)', and 'All neglected opportunities 30,896,060 (2787)'. A dropdown menu is open, showing options like 'Add Customer', 'Add Appointment', 'Add Task - new', etc. A red arrow points to the 'Add Appointment' option.

Or just open the clients personal file, then click the “add” button and, select the desired client and then select “create a new meeting” and in the meeting window select the Zoom and then press OK.

Designation: To Customer Name: Enter client details

Type: Appointment Auto Sms: Hidden:

Date: 14/06/2023 Start Time: 15 : 00 - End Time: 16 : 00

Alert: No Snooze

Subject:

Location:  

Message:

סוג קריאה:

זמן קריאה:

תת סוג קריאה:

הדרכת ובינר:

בחירת קובץ לא נבחר קובץ

Activity initiator: חואי דוד

* Users who do not have calendar synchronization

Participants:

OK Save and Add Cancel

After choosing the Zoom meeting option, the bmy system will show a temporary Zoom link:

Designation: To Customer Name: Enter client details

Type: Appointment Auto Sms: Hidden:

Date: 14/06/2023 Start Time: 15 : 00 - End Time: 16 : 00

Alert: No Snooze

Subject:

Copy link D565F87B-B187-450F-9CC3-39F0DDAA  



After saving the meeting action, a direct Zoom meeting link will be displayed.

Name: 

Type:  Auto Sms: Hidden:

Date:  Start Time: : - End Time: :

[▶ Check representatives availability](#) Alert:

Subject:

Copy link [Meeting Link 88181217060](#)  

Message:

For any question please contact our technical support: [+972-3-5617003](tel:+972-3-5617003)