

Zoom integration in bmby CRM

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

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

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

	Edit Change Password								
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	Surname:	тіт							
	Email:	roidav@gmail.com							
	Privileges:	Inspector							
	Country:	Israel [GMT +2:00]							
Date Format: dd/mm/yy 21/06/22									
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Go	ogle Account								
x	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.	G Sign in with Google					
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after clicking, a new web page window opens, log in with your personal Zoom username and password in order to log-in:

zoom	SOLUTIONS - PLANS & PRICING CONTACT SALES RESOURCES -	JOIN HOST - SIGN IN SIGN UP, IT'S FREE
200/11	SIGN IN Welcome back! New to Zoom? Sign Up Free	Email Address Email Address Paceword Paseword Please enter your password Please enter your password By signing in, lagree to the Zoom's Privacy Statement and Terms of Service. Sign In Or sign in with Or sign in with Or sign in with Or sign in with Stop Or sign in with Stop Stop<

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:

	# =	
	You are about to add Bmby CRM BETA	
0 N	International states of your data have not been reviewed or evaluated by Zoom. Use app only for testing or validation purposes; only allow it if you wish the app to have access to the data below. App can access and manage this information even when not using the app. This app may enable an in-meeting notification to participants if the app is used to access real-line video, audio, chat, or meeting files. Learn more	the
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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:

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2. How to create a Zoom meeting from bmby CRM?

Click on the "plus" icon in order to add appointment :



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	Ji	20	
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After choosing the Zoom meeting option, the bmby system will show a temporary Zoom link:

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

Name: Boris G	
Type: Appointment	✓ Auto Sms:
Date:	Start Time End Time
14/06/2023	15 - : 00 - 16 - : 00 -
Check representatives availability	Alert: No Snooze ~
Subject: Boris G	
Copy link Meeting Link 88181217060	
Message:	h

For any question please contact our technical support: +972-3-5617003