

Configuring your Booking pages to use Zoom

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The [ScheduleOnce connector for Zoom](#) completely automates the provisioning of Zoom sessions. Customers receive a single ScheduleOnce confirmation, including all meeting details in their local time zone. You can configure your [Booking pages](#) to use Zoom by editing the [Conferencing / Location](#) section of the Booking page.

In this article, you'll learn how to configure your Booking pages to use Zoom and how to set up automatic recording.

Configuring your Booking pages to use Zoom

[Connect ScheduleOnce to your Zoom account](#) first, and then follow these steps:

Note:

If a Zoom admin has locked your Zoom settings, **ScheduleOnce will not override those locked settings.**

The single exception to this is the personal meeting ID. If your Zoom admin has locked your Zoom settings so meetings always use your personal meeting ID instead of a unique meeting ID, ScheduleOnce will override this locked setting and always create a unique meeting ID instead.

If the settings are not locked in Zoom, ScheduleOnce configures the settings based on what you define here in the [Conferencing / Location](#) section.

1. Click **Setup** -> **ScheduleOnce setup** in the top navigation bar.
2. Select the Booking page that you want to configure.
3. Select [Conferencing / Location](#) (Figure 1).

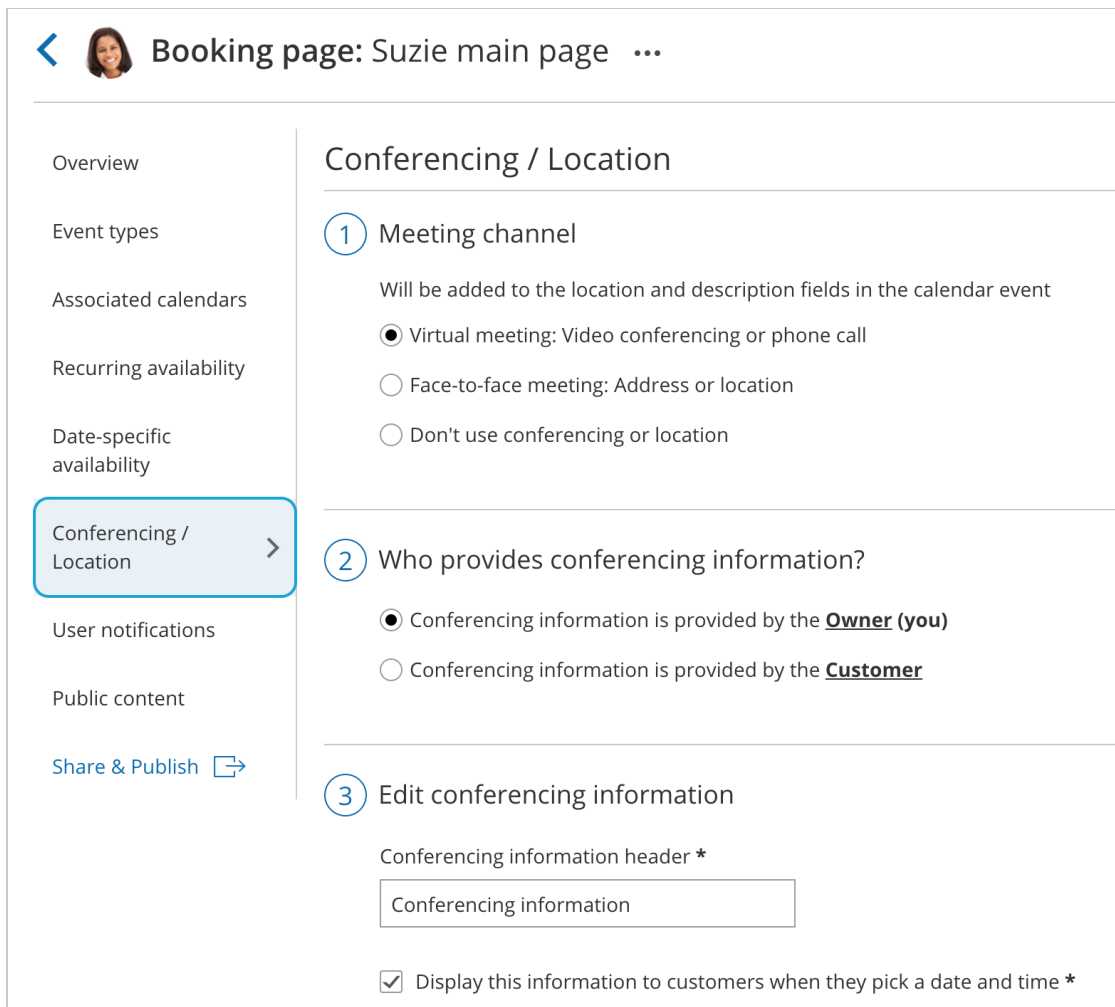


Figure 1: Conferencing / Location section

4. In the **Meeting channel** step, select **Virtual meeting: Video conferencing or phone call**.
5. In the **Who provides conferencing information?** step, select **Conferencing information is provided by the Owner (you)**.
6. In the **Edit conferencing information** step, select the **Zoom video conferencing** option (Figure 2).

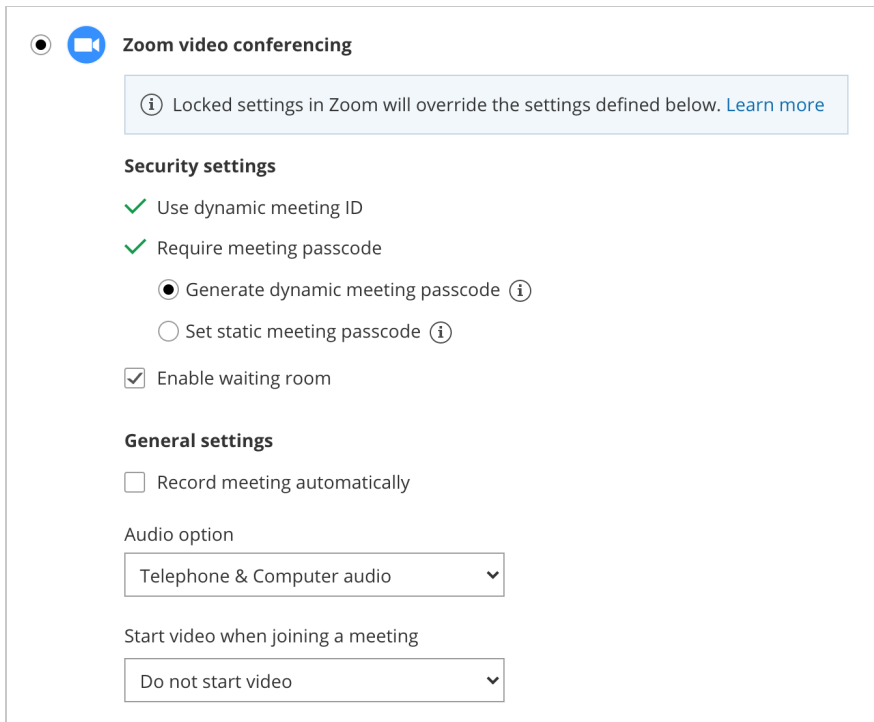


Figure 2: Zoom video conferencing

7. The ScheduleOnce connector for Zoom provides direct access to **Zoom meeting settings**, allowing you to set Zoom audio and other options (see below on automatic meeting recording).
8. Click **Save**.

You're all set! When a booking is made, Zoom session details are integrated with all ScheduleOnce notifications and a Zoom session will be automatically created.

Note:

Generating a dynamic meeting passcode is **highly recommended**.

However, if you instead opt to set a static meeting passcode, which will use that same passcode for every session created through the integration, ensure that the defined passcode complies with your Zoom account's passcode requirements.

Bookings cannot be created if the static passcode conflicts with these requirements. Any attempts to book will result in an error message on the customer end:

The booking cannot be completed due to a temporary connection issue. Please try again later.

Session packages

When you use [Session packages](#), each session includes its unique video conferencing details.

- Schedule and reschedule notification emails that are sent to a Customer include a Conferencing info link next to each selected time.
- When the Customer clicks on the link, the scheduling confirmation page opens as if a single booking was made, displaying the full booking details including the video conferencing information for the session.

- Every reminder that the Customer receives includes the full booking details including the video conferencing information, as if a single booking was made.
- All calendar events for the Owner and Customer include the complete video conferencing information for each session.

Automatic meeting recording

Enabling automatic meeting recording on your local computer

To enable automatic meeting recording on your local computer on any Zoom plan, follow these steps:

1. Sign in to your Zoom account.
2. In the left sidebar, select **Personal -> Settings -> Recording** (Figure 3).

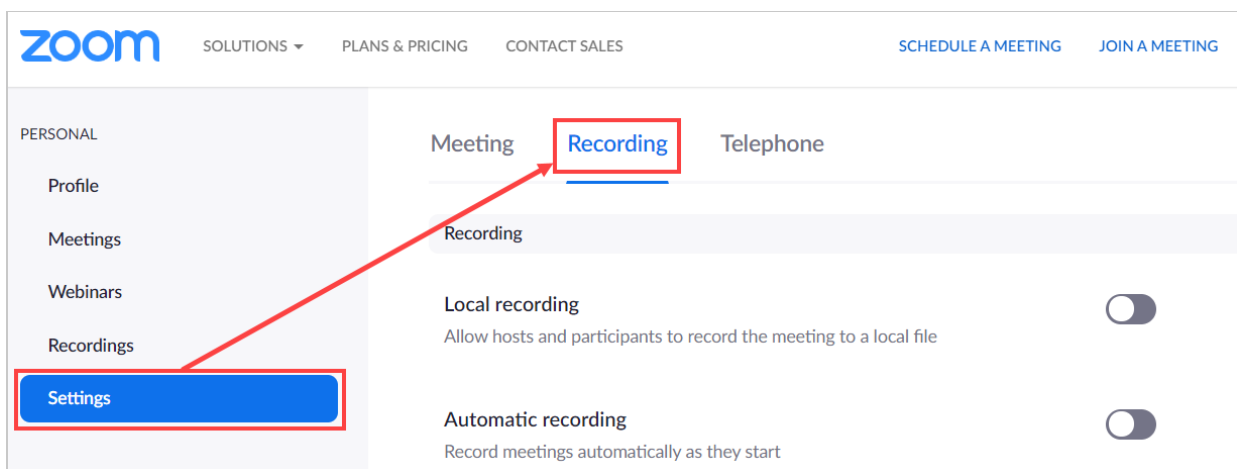


Figure 4: Zoom Recording settings

3. Toggle the **Local recording** option ON.
4. In ScheduleOnce, select the Booking page that you want to configure.
5. In the **Edit conferencing information** step, check the **Record meeting automatically** box (Figure 4).

● **Video conferencing: Zoom**

Audio options

Both

Require meeting password ⓘ

AF798AS1

Record meeting automatically

- On the local computer ⓘ
- In the cloud (Paid Zoom plans only) ⓘ

Start video when joining a meeting:

Host

Participants

Figure 5: Record meeting automatically

6. Select the **On the local computer** option.
7. Click **Save**.

Enabling automatic meeting recording in the cloud

Note:

Meetings cannot be recorded **In the cloud** on a free Zoom plan, and will not be recorded at all when you select the **In the cloud** option in ScheduleOnce.

To enable automatic meeting recording in the cloud on a paid Zoom plan:

1. Sign in to your Zoom account.
2. In the left sidebar, select **Personal -> Settings -> Recording** (Figure 3).
3. Toggle the **Cloud recording** option ON (Figure 5).

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PERSONAL

- Profile
- Meetings
- Webinars
- Recordings
- Settings**

Meeting **Recording** Telephone

Recording

Local recording

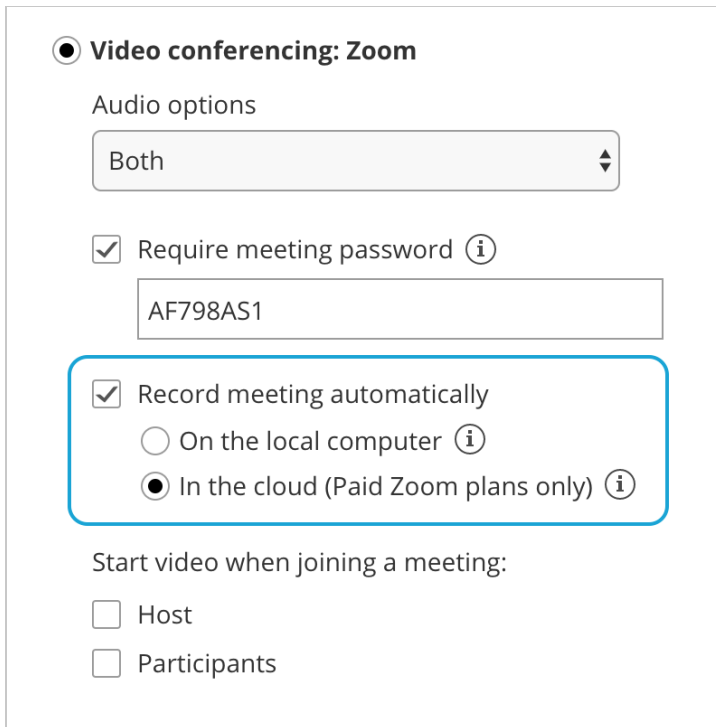
Allow hosts and participants to record the meeting to a local file

Cloud recording

Allow hosts to record and save the meeting / webinar in the cloud

Figure 6: Cloud recording

- In ScheduleOnce, select the Booking page that you want to configure.
- In the **Edit conferencing information** step, check the **Record meeting automatically** box (Figure 6).



Video conferencing: Zoom

Audio options

Both

Require meeting password ⓘ

AF798AS1

Record meeting automatically

On the local computer ⓘ

In the cloud (Paid Zoom plans only) ⓘ

Start video when joining a meeting:

Host

Participants

Figure 7: In the cloud

- Select the **In the cloud** option.
- Click **Save**.