AIO CRM - Zoom Meeting Module User Guide

Version 0.9

Audience: Users managing Zoom meetings inside AIO CRM

Overview

Use the Zoom Meeting module to store API credentials, create meetings linked to Customers/Staff, manage the meeting list, and add extra registrants.

Prerequisites

- A Zoom account with API credentials (Client ID and Client Secret) from Zoom App Marketplace.

- Correct timezone and date/time in AIO CRM.

- Customer and Staff records exist in AIO CRM (for assignment).

A) Zoom API Settings

Path: Zoom Meeting -> Zoom API Settings

Fields

- **Zoom Email Address** - Zoom host email.

- **Zoom API Key** - from your Zoom app (Client ID).

- **Zoom API Secret** - from your Zoom app (Client Secret).

Steps

1 Go to Zoom Meeting -> Zoom API Settings.

2 Enter Zoom Email Address, API Key, and API Secret.

3 Click Save.

How to get your Zoom API Key & Secret (Server-to-Server OAuth)

Open the Zoom App Marketplace: https://marketplace.zoom.us/

Step 1 — Open the Develop menu

Go to the Zoom App Marketplace and click **Develop** (top-right), then choose **Build App**. You can use this link: marketplace.zoom.us.
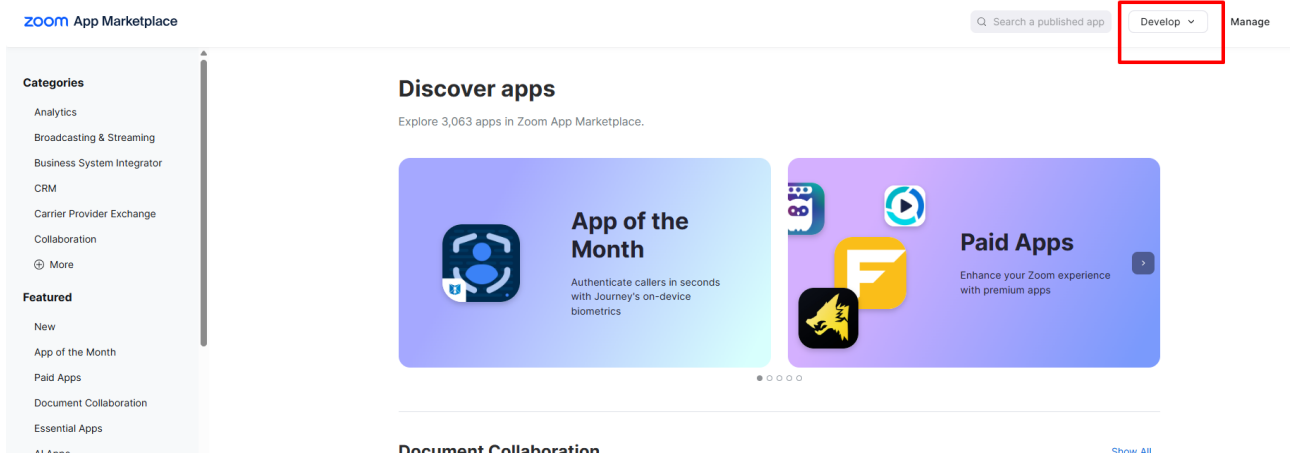
Figure Z-API-1 - Zoom App Marketplace: 'Develop' menu -> Build App

Step 2 — Select the app type

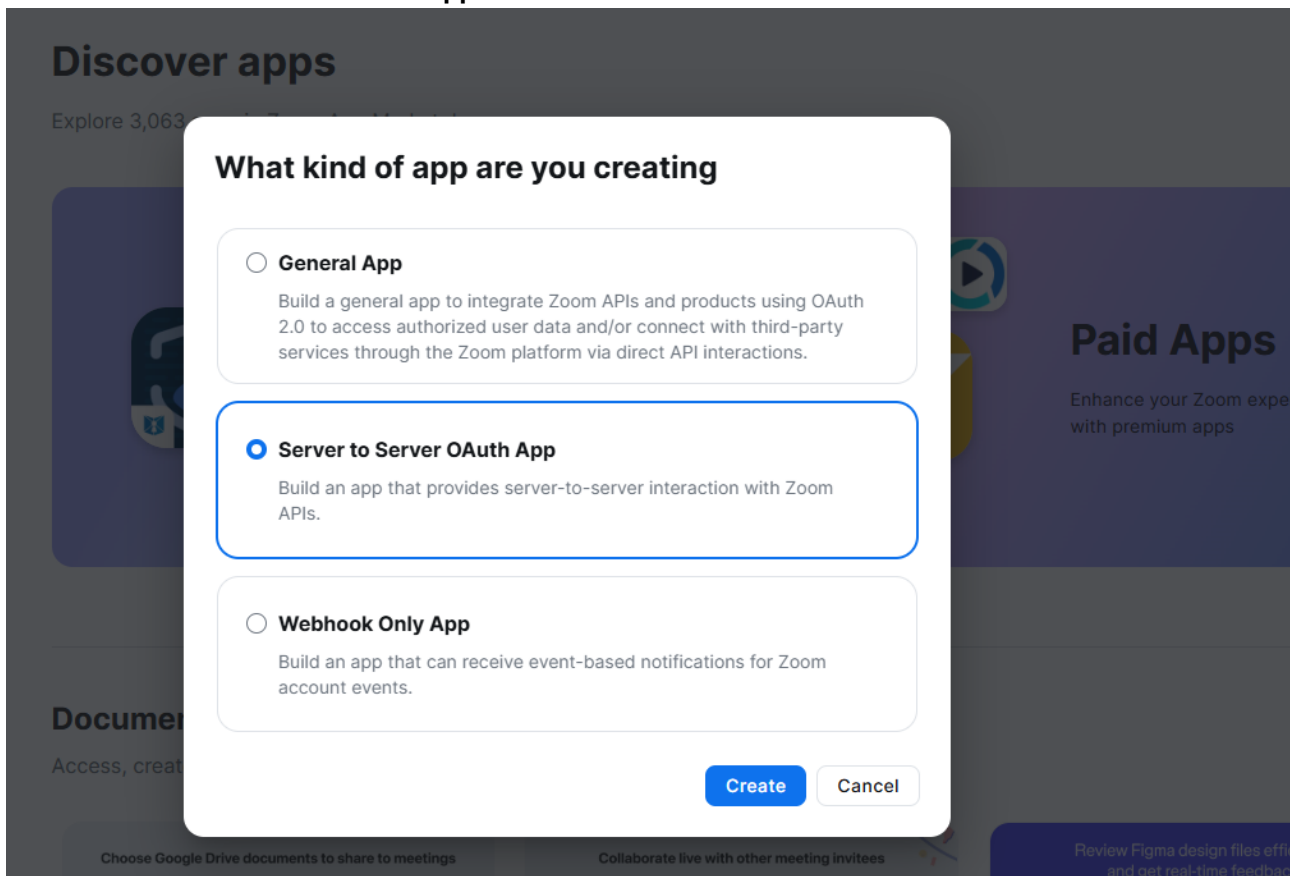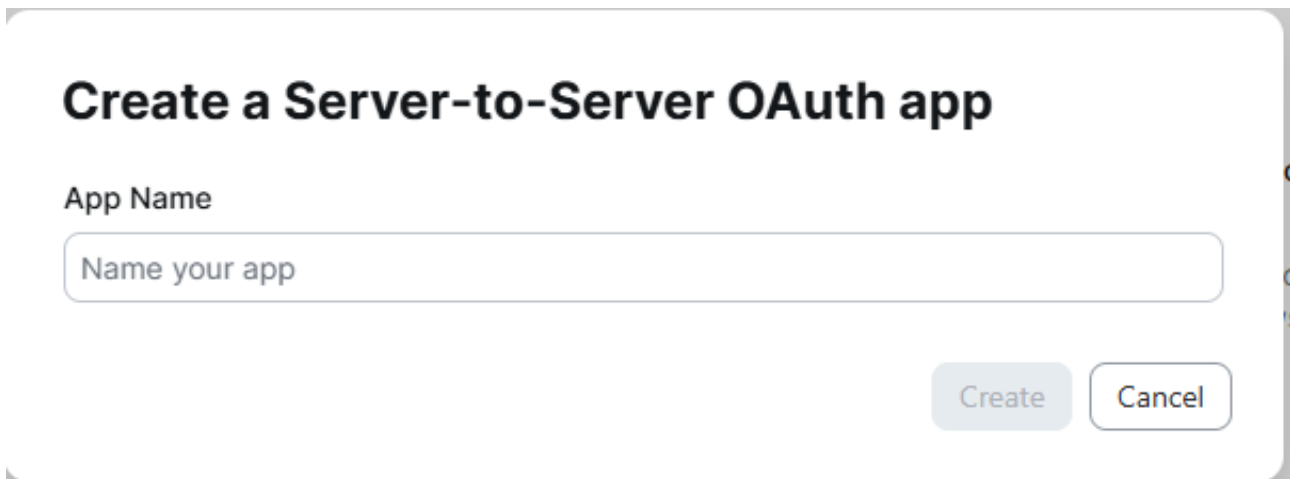Choose **Server to Server OAuth App** and click **Create**.

Figure Z-API-2 - Select 'Server to Server OAuth App'

Step 3 — Name your app
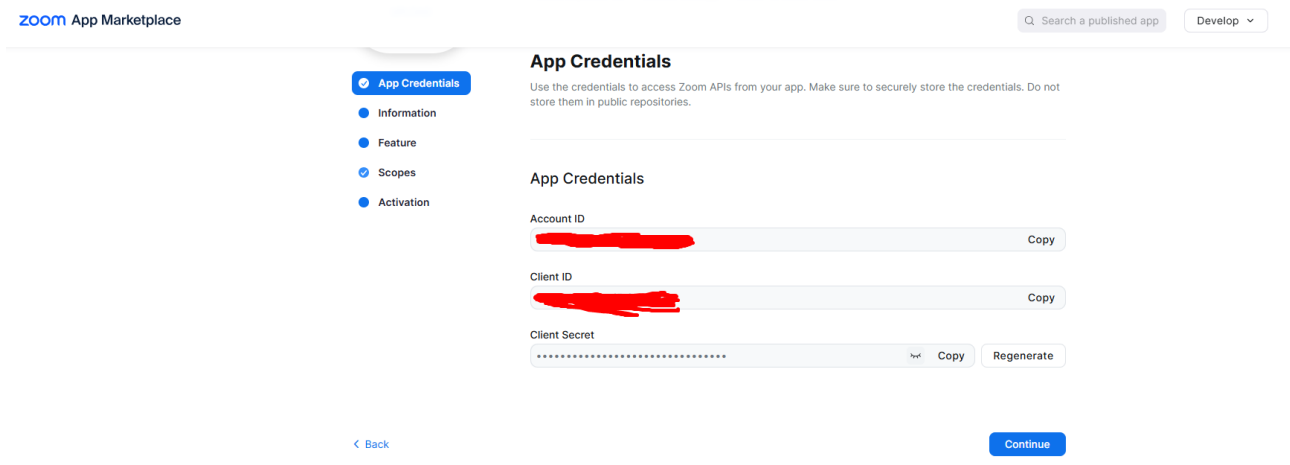
Enter a clear name (e.g., 'AIO CRM Integration') and click **Create**.

Figure Z-API-3 - Name your Server-to-Server OAuth app

Step 4 — Copy your credentials

On **App Credentials**, copy the **Client ID** and **Client Secret**. Keep them secure.

Figure Z-API-4 - App Credentials: copy Client ID and Client Secret

Step 5 — Fill Basic Information

Complete **Information** with the app name, company name, and a corporate contact email.

Figure Z-API-5 - Information: Basic Information & Developer Contact

Figure Z-API-6 - Information: fill required fields

Step 6 — Review Feature settings (optional)

Unless you need webhooks, you can leave **Feature** defaults. Tokens shown here are for webhook validation.

Figure Z-API-7 - Feature: optional tokens & event subscriptions

Step 7 — Open Scopes

Go to **Scopes** and click **Add Scopes**.

Figure Z-API-8 - Scopes: open Add Scopes

Step 8 — Add required scopes

Select at minimum: meeting:read:admin, meeting:write:admin, and user:read:admin.

Figure Z-API-9 - Scopes: select required scopes

Step 9 — Activate the app
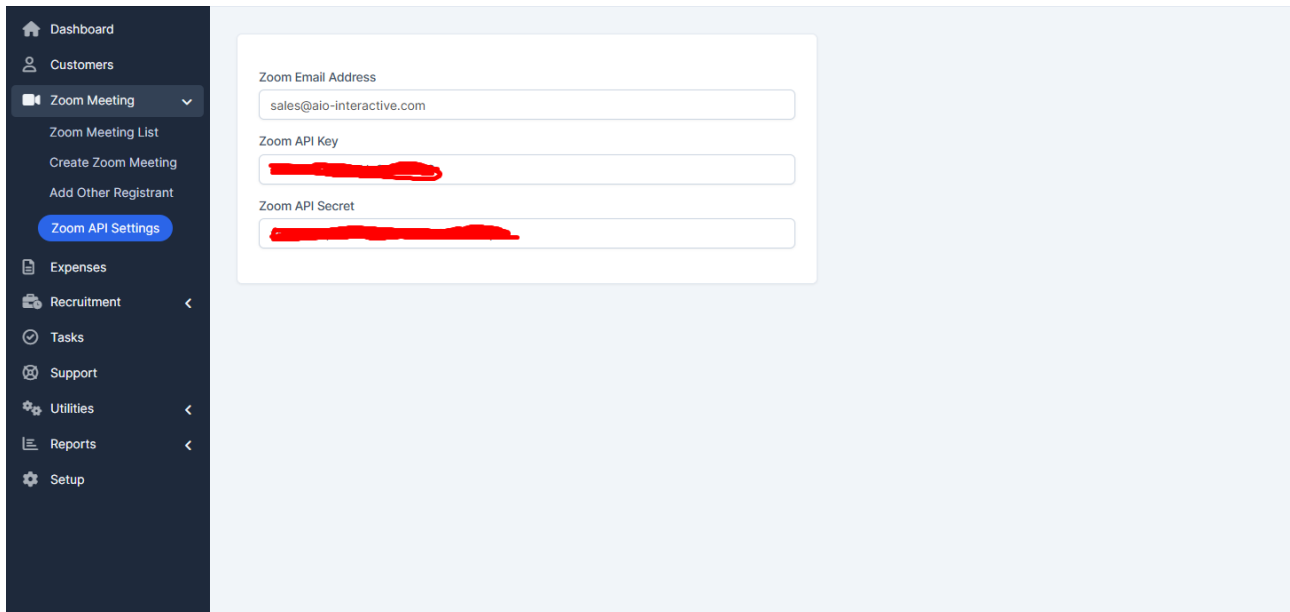
Open **Activation** and click **Activate your app**.

Figure Z-API-10 - Activation: click 'Activate your app'

Step 10 — Paste credentials into AIO CRM

Back in AIO CRM → **Zoom API Settings**, paste **Client ID** into **Zoom API Key** and **Client Secret** into **Zoom API Secret**. Save.

Figure Z-1 - Zoom API Settings (in AIO CRM)

B) Create Zoom Meeting

Path: Zoom Meeting -> Create Zoom Meeting

Fields

- **Customer** - the customer to link.
- **Staff** - meeting owner/host.
- **Meeting Topic** - title shown in Zoom.
- **Timezone** - e.g., Singapore.
- **Start Date** - date & time.
- **Meeting Duration (min)** - total minutes.
- **Meeting Agenda** - optional notes.

Steps

1 Open Create Zoom Meeting.

2 Fill Customer, Staff, Meeting Topic, Timezone, Start Date, Duration.

3 Add Meeting Agenda (optional).

4 Click Save. The meeting appears in the list with a Join URL.

Figure Z-2 - Create Zoom Meeting

C) Zoom Meeting List

Path: Zoom Meeting -> Zoom Meeting List

What you see

Columns for Meeting ID, Zoom Meeting (Topic), Timezone, Start time, Duration (min), Agenda, Join URL, Delete.

Actions

- Search/Sort rows, Export, or Refresh with the toolbar.

- Click the person+ icon under Join URL to add registrants.

- Click the trash icon to delete a meeting.

Figure Z-3 - Zoom Meeting List

D) Add Other Registrant

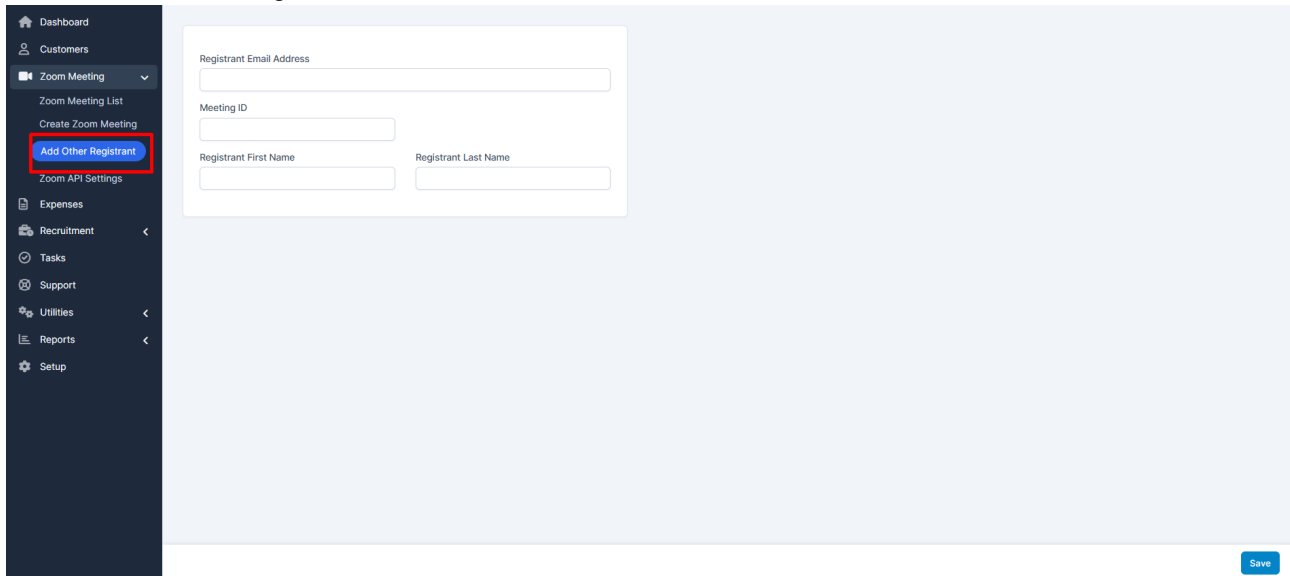**Path:** Zoom Meeting -> Add Other Registrant

Fields

- **Registrant Email Address**

- **Meeting ID** (from the list)
- **Registrant First Name**, **Registrant Last Name**

Steps

1 Open Add Other Registrant.

2 Enter the registrant's email and name.

3 Paste the exact Meeting ID from Zoom Meeting List.

4 Click Save. The registrant receives Zoom confirmation.

Figure Z-4 - Add Other Registrant

Common Errors & Fixes

- Invalid API Key/Secret -> Copy fresh credentials from Zoom Marketplace and save again.
- Meeting ID not found -> Confirm it exists in Zoom Meeting List and copy the numeric ID exactly.
- Timezone/Start mismatch -> Set the correct Timezone and Start Date before saving.