

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.

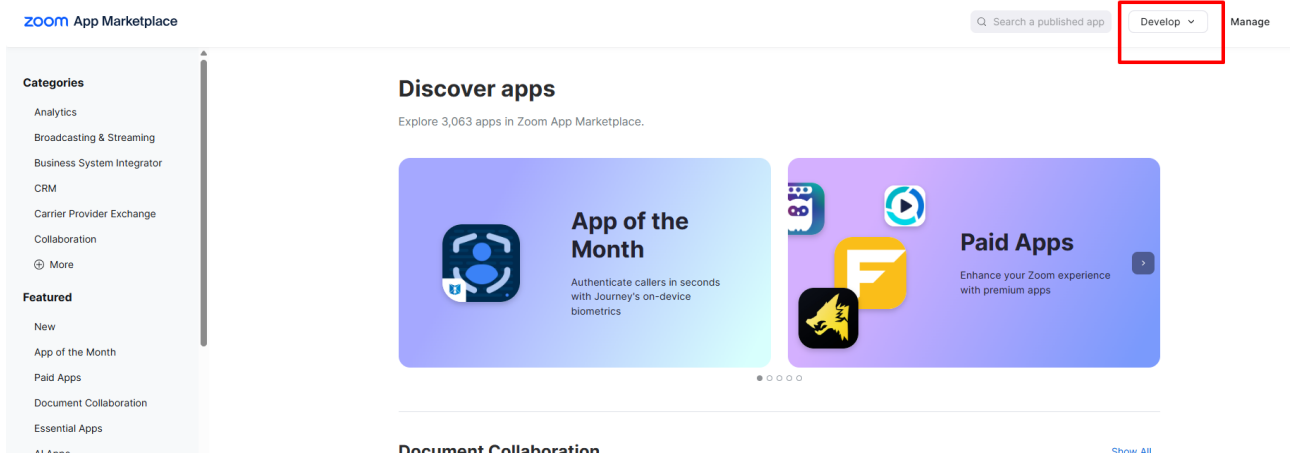


Figure Z-API-1 - Zoom App Marketplace: 'Develop' menu -> Build App

Step 2 — Select the app type

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

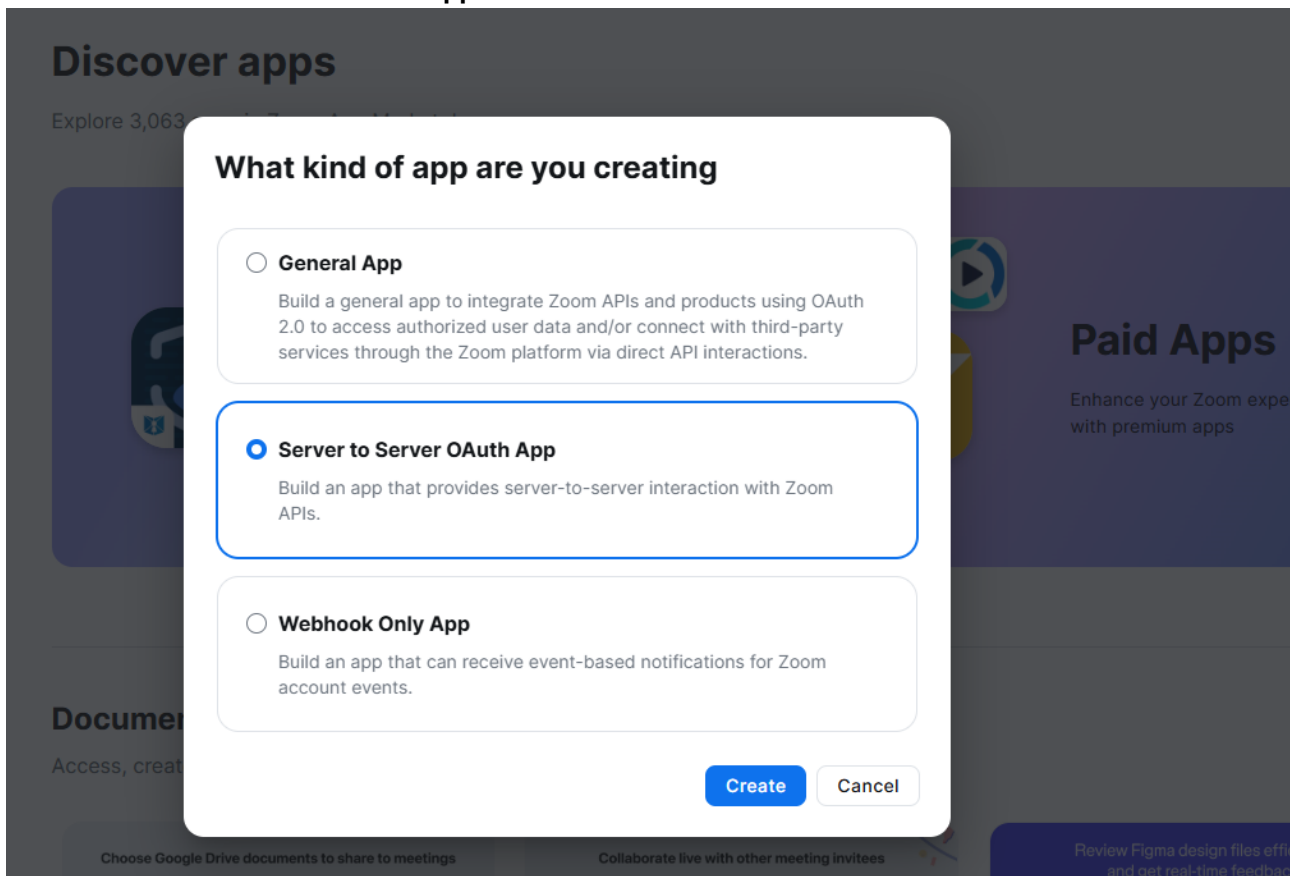
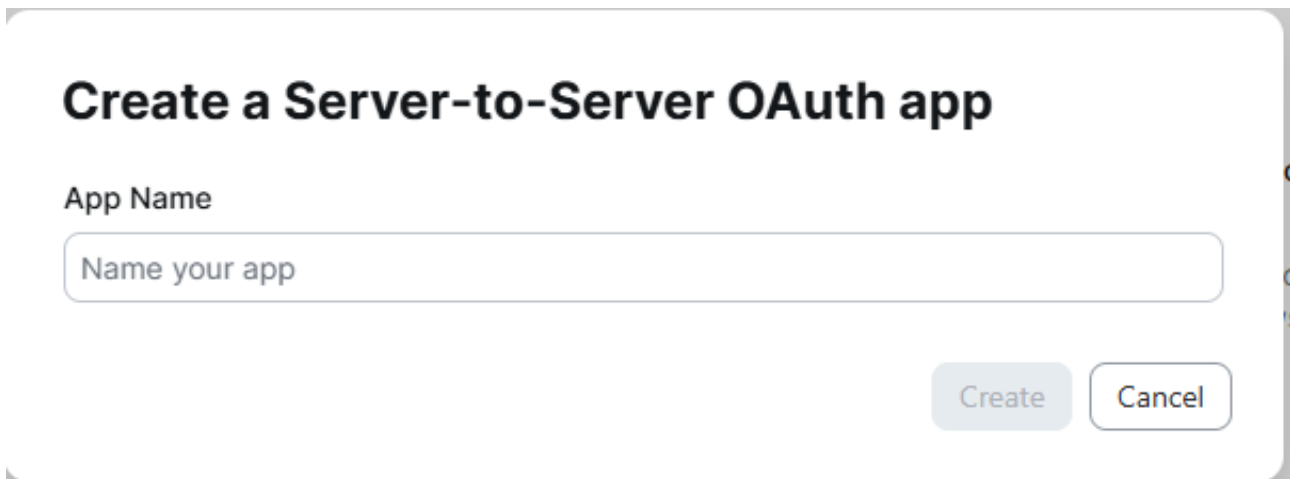


Figure Z-API-2 - Select 'Server to Server OAuth App'

Step 3 — Name your app

Enter a clear name (e.g., 'AIO CRM Integration') and click **Create**.



Create a Server-to-Server OAuth app

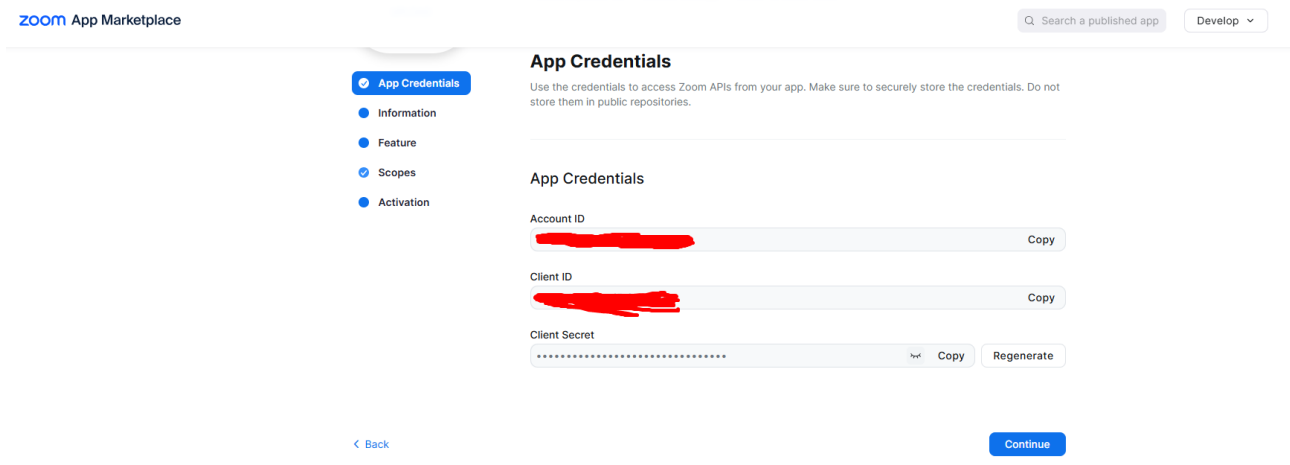
App Name

Create Cancel

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.



zoom App Marketplace

Q Search a published app Develop

App Credentials

Use the credentials to access Zoom APIs from your app. Make sure to securely store the credentials. Do not store them in public repositories.

App Credentials

Account ID Copy

Client ID Copy

Client Secret Copy Regenerate

< Back Continue

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.

● Feature

● Scopes

● Activation

Basic Information

App Name

zoom app

8/50

Short Description

Describe your app's core features in 1-2 sentences. This will show on the app listing card.

Short Description

0/150

Company Name

e.g. ACME

Developer Contact Information

Provide your **corporate email** for announcements including new Marketplace/API updates, breaking changes, and other updates that have impact on your app.

Name

e.g. John Doe

Email

e.g. john.doe@company.com

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Continue

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

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UPLOAD

✓ App Credentials

● Information

● Feature

● Scopes

● Activation

zoom app

Intend to publish: No Account-level app Server-To-Server OAuth

Information

Basic Information

App Name

zoom app

8/50

Short Description

Describe your app's core features in 1-2 sentences. This will show on the app listing card.

Short Description

0/150

Company Name

e.g. ACME

Developer Contact Information

Provide your **corporate email** for announcements including new Marketplace/API updates, breaking changes, and other updates that have impact on your app.

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.

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App Credentials

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Information

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Feature

●

Scopes

●

Activation

Intend to publish: NoAccount-level appServer-To-Server OAuth

Add feature

Token

Secret Token

Zoom sends the secret token in each event notification we send to your app.
Note: This secret token is used to verify event notifications sent by Zoom.

gCTKVPYCTaa-jenJLek4fw

Copy

Regenerate

Verification Token **(Retired in June 2025)**

Replace the Verification Token with Secret Token to verify event notifications from Zoom.

3FP8smb1SVWjfdPrfeXkQQ

Copy

Regenerate

General Features

Event Subscriptions

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This feature allows you to subscribe to receive near real-time data of your Zoom account using Webhooks.

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

Step 7 — Open Scopes

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

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App Credentials

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Information

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Feature

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Scopes

●

Activation

Intend to publish: NoAccount-level appServer-To-Server OAuth

zoom app

Add Scopes

Scopes define the API methods this app is allowed to call, and thus which information and capabilities are available on Zoom. Scopes are restricted to specific resources like channels or files. If your app is submitted to Zoom, we will review your request for each scope. After your app is live, it will only be able to use permission scopes that Zoom approved. [Learn more about Zoom's scopes.](#)

Q

Search name, ID, type

+ Add Scopes

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Continue

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.

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App Credentials

Information

Feature

Scopes

Activation

Intend to publish: No Account-level app Server-To-Server OAuth

Add Scopes

Scopes define the API methods this app is allowed to call, and thus which information and capabilities are available on Zoom. Scopes are restricted to specific resources like channels or files. If your app is submitted to Zoom, we will review your request for each scope. After your app is live, it will only be able to use permission scopes that Zoom approved. [Learn more about Zoom's scopes.](#)

Q Search name, ID, type

+ Add Scopes

Scopes	Description	Optional	
Meeting			
View and manage all user meetings			
meeting:write:meeting:admin	Create a meeting for a user	<input type="checkbox"/>	
Meetings			
View all user meetings			
meeting:read:meeting:admin	View a meeting	<input checked="" type="checkbox"/>	
Users			
View all user information			
user:read:user:admin	View a user	<input type="checkbox"/>	

Scope description

Specify how this data is used within the application, and whether or not the data is stored. If stored, please denote how the data is stored (encrypted, plain text)

Enter description

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Continue

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

Step 9 — Activate the app

Open **Activation** and click **Activate your app**.

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App Credentials

Information

Feature

Scopes

Activation

Intend to publish: No Account-level app Server-To-Server OAuth

Your app is ready for activation

Once on, your app is allowed to invoke your selected Zoom APIs

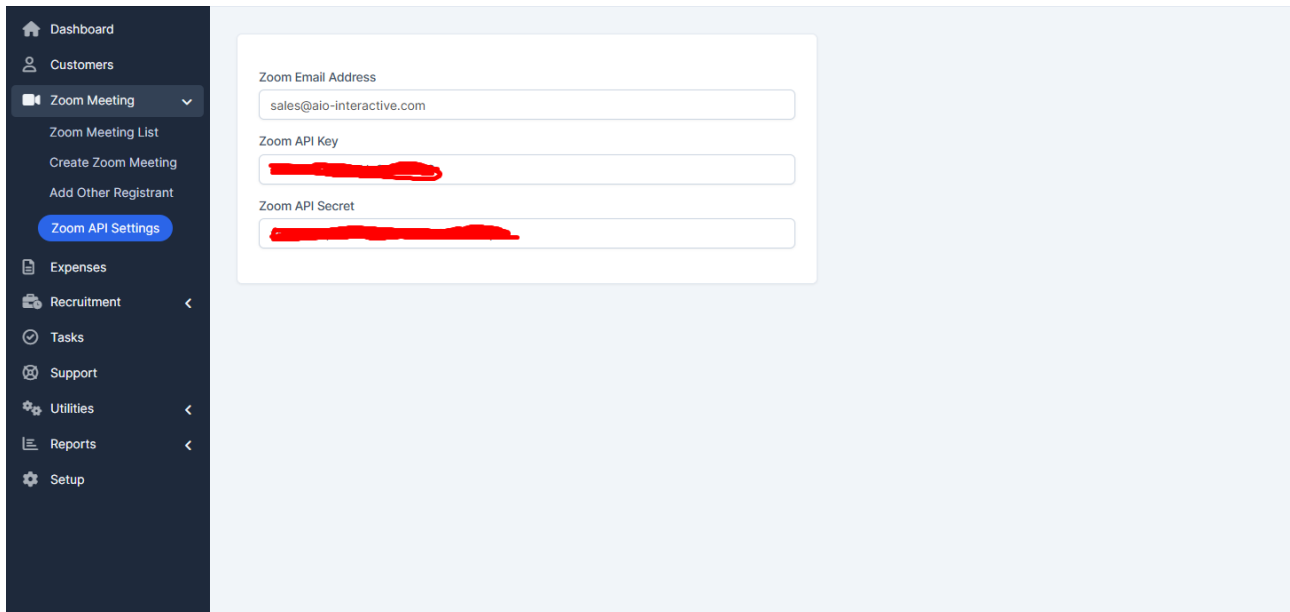
Activate your app

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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.



The screenshot shows the 'Zoom API Settings' form in the AIO CRM interface. On the left is a dark sidebar with a navigation menu. The 'Zoom Meeting' section is expanded, and 'Zoom API Settings' is highlighted with a blue button. The main content area contains a white form with three input fields: 'Zoom Email Address' (containing 'sales@aio-interactive.com'), 'Zoom API Key' (containing a redacted value), and 'Zoom API Secret' (containing a redacted value).

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.

The screenshot shows the 'Create Zoom Meeting' form. The left sidebar has a dark blue background with white text. The 'Zoom Meeting' menu item is highlighted with a red box, and the 'Create Zoom Meeting' button is also highlighted with a red box. The main form area is white and contains the following fields:

- Customer:** A dropdown menu with the text 'Select and begin typing'.
- Staff:** A dropdown menu with the text 'Nothing selected'.
- Meeting Topic:** A text input field.
- Timezone:** A dropdown menu with 'Singapore' selected.
- Start Date:** A date picker field.
- Meeting Duration (min):** A text input field.
- Meeting Agenda:** A large text area for notes.
- Save:** A blue button at the bottom right.

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.

Dashboard

Customers

Zoom Meeting

Zoom Meeting List

Create Zoom Meeting

Add Other Registrant

Zoom API Settings

Expenses

Recruitment

25

Export

Meeting ID

Zoom Meeting

Timezone

Start time

Duration (min)

Agenda

Join Uri

Delete

ABC

Asia/Singapore

2025-06-05 17:38:00

40

Business discussion

+

Showing 1 to 1 of 1 entries

Previous

1

Next

Figure Z-3 - Zoom Meeting List

D) Add Other Registrant

Path: Zoom Meeting -> Add Other Registrant

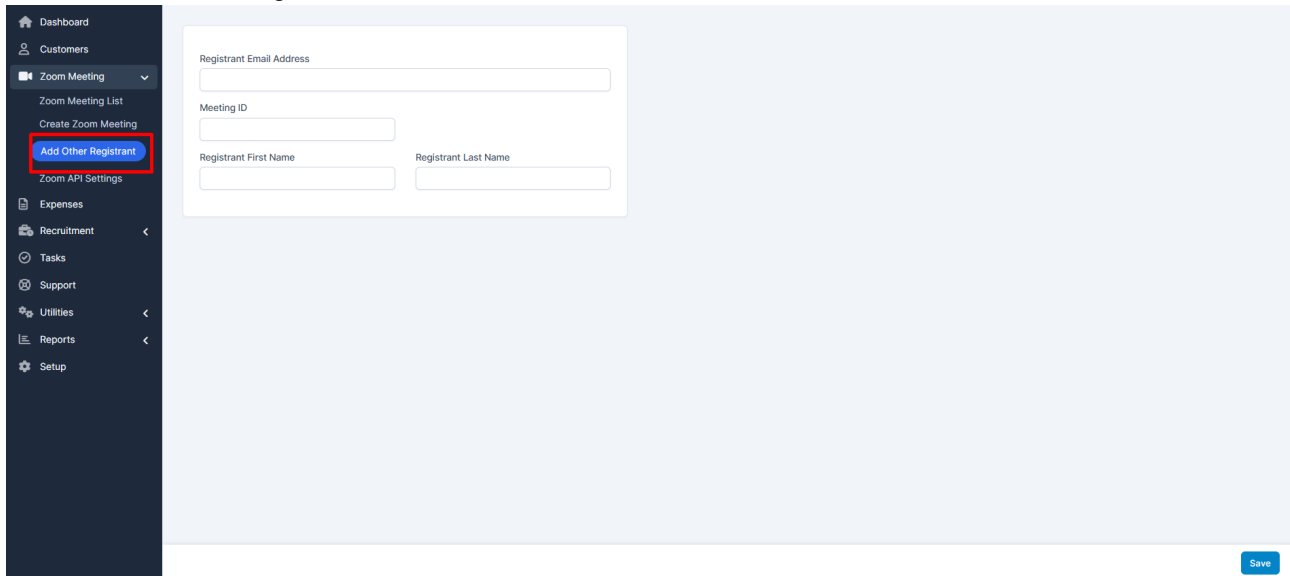
Fields

- 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.



The screenshot displays the AIO CRM interface with a dark sidebar on the left and a light blue main content area. The sidebar menu includes: Dashboard, Customers, Zoom Meeting (expanded), Zoom Meeting List, Create Zoom Meeting, Add Other Registrant (highlighted with a red rectangle), Zoom API Settings, Expenses, Recruitment, Tasks, Support, Utilities, Reports, and Setup. The main content area features a white form with the following fields: Registrant Email Address, Meeting ID, Registrant First Name, and Registrant Last Name. A blue 'Save' button is located at the bottom right of the form.

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.