

Getting Started with “Element451 Admin” Zoom Integration

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Element451 Admin

By Element451

Works with: Zoom Meetings

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Categories:

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CRM

Create Zoom meetings from Element451.

Create Zoom meetings from Element451. When you build an event in Element a Zoom meeting will be created and your Zoom link will be added to event confirmations and reminders. Element will automatically mark who attended the Zoom event too.

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Prerequisites

- Zoom feature enabled for the Element451 Client.
- Element451 dashboard administrator user with:
 - Permissions to manage events on Events451 feature
 - Permissions to manage the Zoom application.
- Zoom account admin with permission to manage users, meetings.

Overview

The Element451 Admin integration with Zoom allows you to create Zoom Meetings for your virtual events easily and from inside the Element451 Events dashboard. Users registered for your event will be automatically marked as attended as they join your event meeting.

Here are some terms to be familiar with as you read this document:

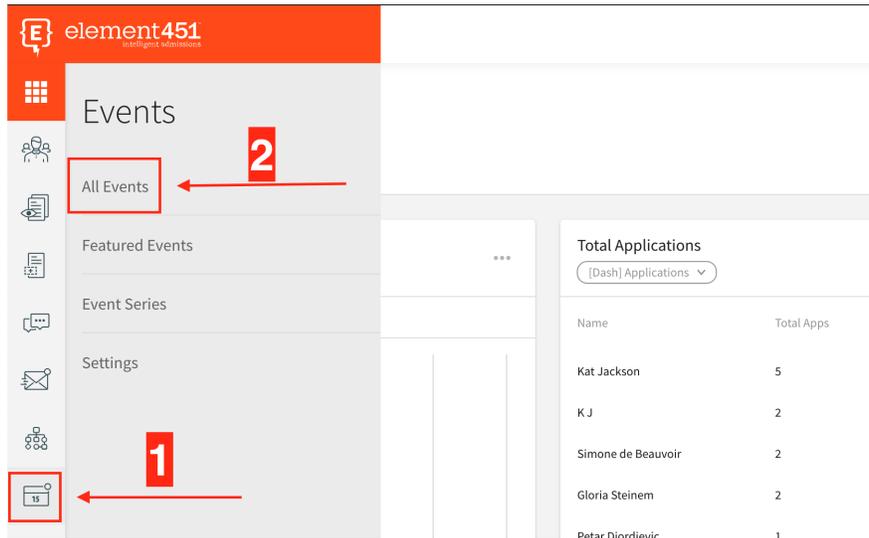
- **“Client”** refers to your School/Organization.
- **“Meeting”** will be used as a reference to a Zoom meeting.
- **“Date”** will be used as a reference to Element451 Event Dates.

How is your data used by Element451?

- **Meetings details:** allows us to display and update meeting details, including the advanced settings. We will only see details for meetings created through Element451.
- **Profile email:** used to display the account that is currently signed in for Zoom integration.

How to install the integration?

1. Access Element451 Client dashboard using your administrator credentials.
2. Navigate to the “Events” > “All Events” section on the side menu.



3. Click to create a new virtual Event and select “**Make it a Zoom**” option.

New Event
Enter the basic details of the event.

Event name
Virtual Zoom Event

Make it a Zoom
 Yes

Manage Zoom links in Date section.
Event type
College Fair

4. On Event view, navigate to “Event Overview” tab > “Event Date(s)”.
5. Click the “Login to Zoom” button.

Events / Virtual Zoom Event / Event Overview

Virtual Zoom Event ★ Draft

Created by Oscar Loria

Privacy: Public Event type: College Fair Signups: Yes Categories: Admissions

1 EVENT OVERVIEW ATTENDEES SIGNUPS

2 Description Event Date(s) Location Presenter(s) Questions & Answers

3 Event Date(s) **Login to Zoom**

DATES	EXCLUSIONS	TIME ZONE
Date	Day	Signups
Mar 11, 2021	Thursday, 09:00 AM - 11:00 AM	0

+ Add a Date

6. Authorization screen on the Zoom website will appear and you will be asked to grant Element451 access to your information.



Element451 Admin is requesting access to your Zoom account

View all user meetings [?](#)

From app developer: List and show your Element Event meetings.

View and manage all user meetings [?](#)

From app developer: Manage your Element Event meetings.

View all user information [?](#)

From app developer: Display the current logged in account email.

You may be sharing sensitive info with this site or app. By clicking Authorize, you authorize this app to use your information in accordance with their [Privacy Policy](#). At any time you can revoke access for Element451 Admin or any other app by visiting your [Installed Apps](#) page.

Authorize

Decline

7. Once authorized you will be redirected to the Element451 Client dashboard and now you will see a “Zoom” button with your Zoom account email displayed. Here is where you can later logout from zoom integration.

The screenshot shows the 'Virtual Zoom Event' overview page. The event is titled 'Virtual Zoom Event' and is in 'Draft' status. It was created by Oscar Loria. The event type is 'College Fair', and the privacy is set to 'Public'. The 'Signups' toggle is turned on (Yes). The category is 'Admissions'. The 'Event Date(s)' section is active, and a red box highlights the 'Zoom' button with the email address 'Zoom (oaloria@element451.com)'. A red arrow points from the 'Event Date(s)' section to the 'Zoom' button.

Now you are ready to start creating **Meetings** for your Element451 Events.

How to use the integration features?

1. Adding a new Meeting to your Event Date.

When adding a new **Date** or updating an existing **Date**, you will see the “Add Zoom Meeting” button on the **Date** editing form. By clicking the button Element451 will instantly create a new **Meeting** for you.

The screenshot shows a form titled "Single Date Event" with a close button (X) and an "ADD" button. Below the title is the instruction "Please fill out your event information." The form contains the following fields:

- Start Date:** 3/11/2021
- End Date:** 3/11/2021
- Is the length of this event a full day?:** A toggle switch is turned off, labeled "No".
- Start Time:** (empty)
- End Time:** (empty)
- Event Link:** (empty)

Below the Event Link field, there is a blue button labeled "Add zoom meeting".

If you decide to discard a new **Date** instead of clicking “Add”, Element451 will clean up the created **Meeting**. Once a **Meeting** has been added to an existing **Date** or the new **Date** has been added to your Event, you will have the option to update or unlink the **Meeting** using the “Delete” and “Manage” buttons under the event link in the **Date** editing form.

In case that your Element admin user email address matches a Zoom user email address from the available, then the **Meeting** will be added for that user automatically, you can still change this later by clicking on the “Manage” button.

In case an email address match is not found, then we will ask which user you want to add the **Meeting** for.

The screenshot shows the same "Single Date Event" form, but now with a blue "ADD" button in the top right corner. The form fields are filled with the following information:

- Start Date:** 3/11/2021
- End Date:** 3/11/2021
- Is the length of this event a full day?:** A toggle switch is turned off, labeled "No".
- Start Time:** 09:00 am
- End Time:** 11:00 am
- Event Link:** <https://us02web.zoom.us/j/86385084937?pwd=djNkbUdBZGc5ejdvUmlEczNGdzhndz09>

Below the Event Link field, there are two blue buttons: "Delete" and "Manage".

Don't forget to click the "Add" or "Update" button at the top of the **Date** editing form to save your changes.

2. Updating existing Date Meeting.

Once you create a **Meeting** for a **Date**, any change you make to the **Date** on the date or time will be automatically saved and reflected in the added **Meeting** when the **Date** changes are saved.

If you click on the "Manage" button the edit screen will appear and you will be able to adjust the **Meeting** settings, these changes will be saved and reflected in the added **Meeting** as soon as you click on the "Update" button for the **Date** changes.

× Configure Zoom Meeting
DONE

Meeting Host
Oscar Loria ▼
Select a zoom user you'd like to host this meeting.

Advanced Settings ▲

Registration type
Attendees need to register for each occurrence to attend ▼

Automatic recording
No Recording ▼

Approval type
No Registration Required ▼
Enable registration and set approval for the registration.

Contact email for registration

Contact name for registration

Audio
Both Telephony and VoIP ▼
Determine how participants can join the audio portion of the meeting

Start video when the host joins the meeting. No

Start video when participants join the meeting. No

Allow participants to join the meeting before the host starts the meeting. No

Use a personal meeting ID. No

Enable waiting room. ..

Prerequisites

- Have an existing **Date** with a **Meeting** added.

3. Removing an existing Date Meeting.

You have the freedom to remove the **Meetings** added with your **Dates** whenever you want by clicking the “Delete” button.

This action will immediately remove the link between your **Date** and the **Meeting**, it's your decision if you also want to delete the **Meeting** associated.

You will get a confirmation dialog before proceeding with this action.

Are you sure you want to delete this event date(s)?

Event has zoom meeting connected, do you want to delete that as well?

No

No Yes

Prerequisites

- Have an existing **Date** with a **Meeting** added.

4. Tagging Event registrants as attended.

Once the **Meeting** has been started and users start joining it, Zoom will let Element451 know who is joining the **Meeting**. Element451 will match those users by email address and mark them as “Attended” for the **Date** that is taking place. In order to take advantage of this feature, users must be required to join the meeting by signing into Zoom.

Name	Email	Attended	Event Date	Number of People
Andrew Vest	aloria+avest@element451.com	<input checked="" type="checkbox"/> Yes	Mar 2, 2021 - 05:00 PM	1

Prerequisites

- A **Date** with a **Meeting** added.
- The Event must be live according to the **Date** date and time.
- The **Meeting** must have started.
- Users must be required to join the meeting by sign in to Zoom.

How to uninstall the integration?

1. Uninstalling the “Element451 Admin” Add-on

1. Login to your Zoom account and navigate to the Zoom App Marketplace.
2. Click “Manage” > “Installed Apps” or search for the Element451 Admin App.
3. Click the Element451 Admin App.
4. Click Uninstall.

Deauthorizing the “Element451” integration will immediately remove any link between Element Event Dates and Meetings, by removing all your Meeting references and the access details for your Zoom Account, however we will not delete the Meetings from Zoom.

2. Uninstalling the “Element451 Admin” Add-on from Element451 Dashboard

1. Access Element451 client dashboard using your administrator credentials.
2. Navigate to the “Events” > “All Events” section on the Element451 dashboard side menu.
3. Click to edit an existing Event, or create a new Event.
4. On Event view, navigate to “Event Overview” tab > “Event Date(s)”.
5. Click on the “Zoom” button and select “Logout”.

This action will also deauthorize “Element451 Admin” application from your zoom account.

Uninstalling the “Element451” integration will immediately remove any link between Element Event Dates and Meetings, by removing all your Meeting references and the access details for your Zoom Account, however we will not delete the Meetings from Zoom.

The screenshot displays the 'Event Overview' page for a 'Virtual Zoom Event'. The page includes a header with the event title, a 'Draft' status, and a 'Created by Oscar. Loria' field. Below this, there are settings for 'Privacy' (Public), 'Event type' (College Fair), 'Signups' (Yes), and 'Categories' (Admissions). The main content area is divided into three tabs: 'EVENT OVERVIEW', 'ATTENDEES', and 'SIGNUPS'. The 'EVENT OVERVIEW' tab is selected. Underneath, there are sections for 'Description', 'Event Date(s)', and 'Location'. The 'Event Date(s)' section is expanded, showing a table with columns for 'DATES', 'EXCLUSIONS', and 'TIME ZONE'. A red box highlights the 'Zoom (oaloria@element451.com)' button and the 'Logout' button in the 'Signups' column. Red arrows and numbers 1, 2, and 3 indicate the steps: 1 points to the 'EVENT OVERVIEW' tab, 2 points to the 'Event Date(s)' section, and 3 points to the 'Zoom' button.

Troubleshooting

Common Installation Issues

- Cannot access Events:
 - You might not have permissions to see this module. Check with your Element451 administrator.
- Cannot see “Login to Zoom” button:
 - You might not have permissions to install this feature. Check with your Element451 administrator.
 - Your organization account might not have Zoom feature enabled. Check with Element451 customer support.

Other issues

- Event registrant is not tagged as attended: This action is limited to the user signing in to Zoom email address matching the email address they have on Element451.

How to get support?

If you experience any unexpected issues visit [Element451 help page](#) and see all the available contact channels.