User guide: Zoom meetings in Brieff

1) **Installation:**

   No installation is required.

   Brieff identifies Zoom meeting links through its Google and Microsoft Calendar integrations and automatically adds them to your meetings.

2) **Usage**:

Using Zoom through Brieff's Calendar integrations.

   a) Ensure you have added the client and their contacts to Brieff. The app will use client contact emails to identify which meetings need to be synced.
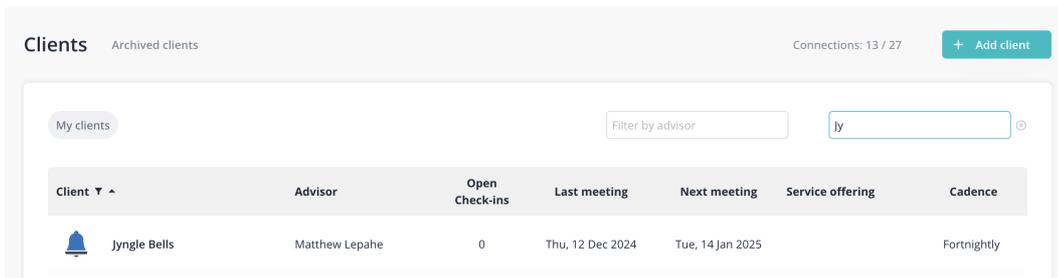
   b) First, ensure you have a Google or Microsoft calendar integration connected to your Brieff account in Settings.

c) Either sync your calendar from the *Settings* page or the client's *Meetings* page. The calendar integration will add/update/remove meetings to match your calendar.
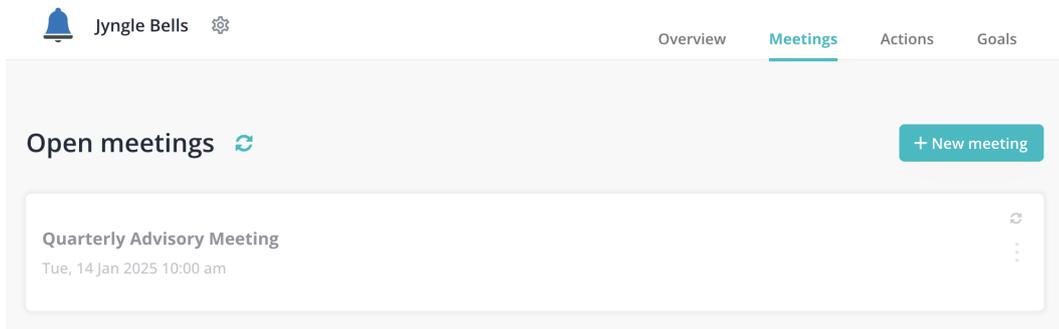
d) You can choose to either create the meeting from scratch or pre-fill it using previous meeting information.
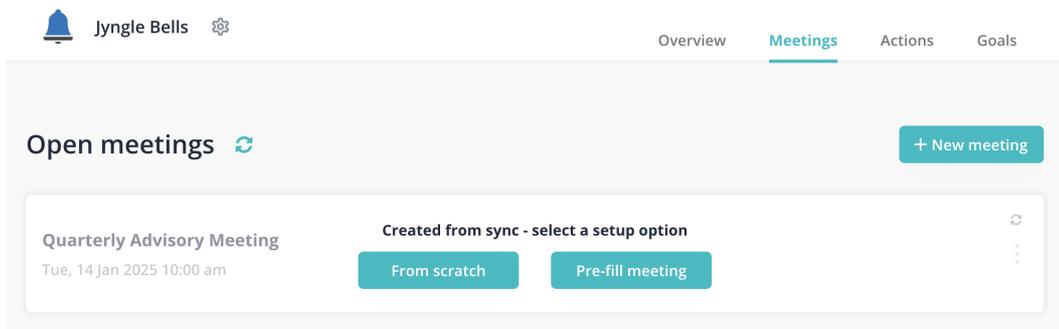
e) After setting the meeting up, and if your meeting is a Zoom meeting (or any other video conference meeting), a toggle will appear in the meeting block, allowing you to choose whether to record the meeting.
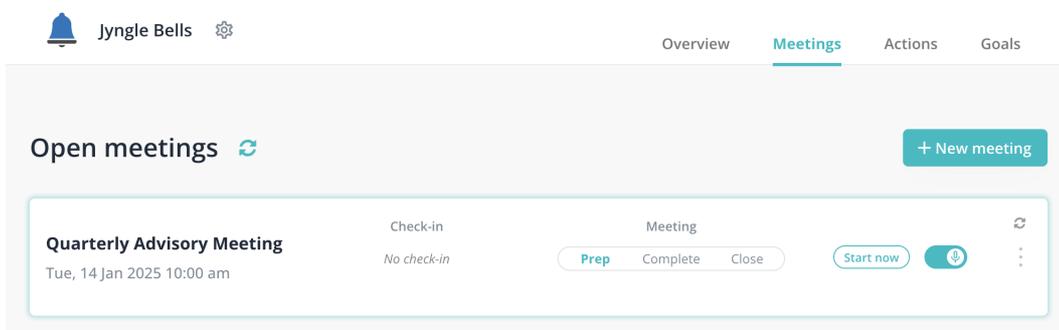
f) This toggle can be adjusted on pages that show meetings as a list or while in the Brieff *Meeting Prep* or *Meeting* pages.
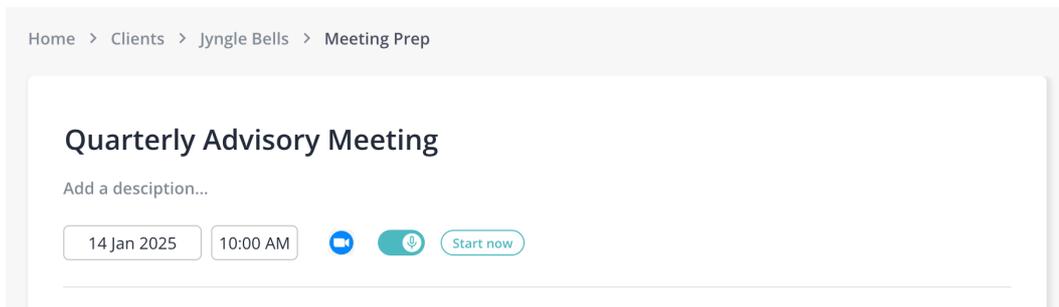
g) You can view, edit, or copy the meeting link by hovering over the Zoom icon and clicking on the view link icon that appears.

Using Zoom through Brieff's Calendar integrations.

a) When on the Meeting Prep or Meeting pages in Brieff, click on the "Add a meeting link" button.
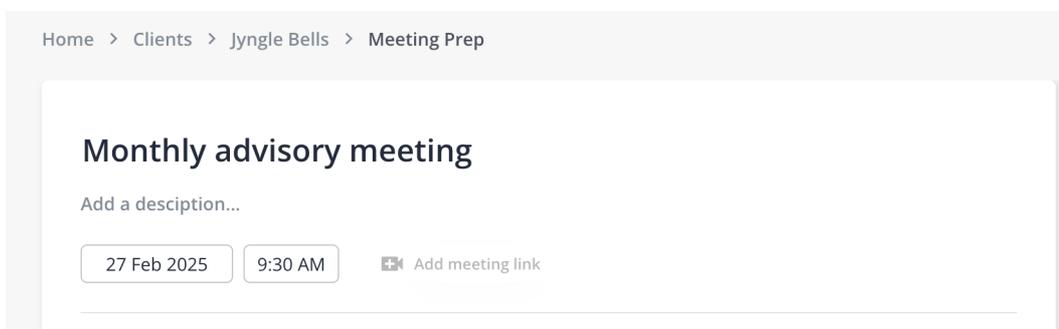
b) Enter your Zoom meeting link and click on the tick to save.
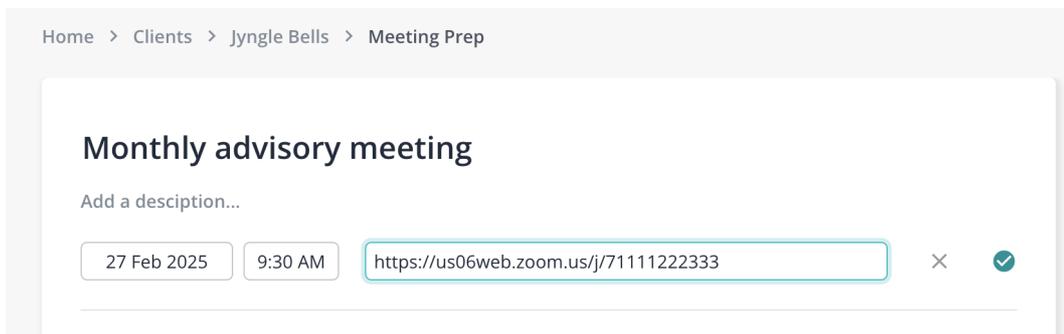
c) Your Zoom link has now been added to your meeting, and you can choose to toggle a recording on or off or launch the meeting now from Brieff.
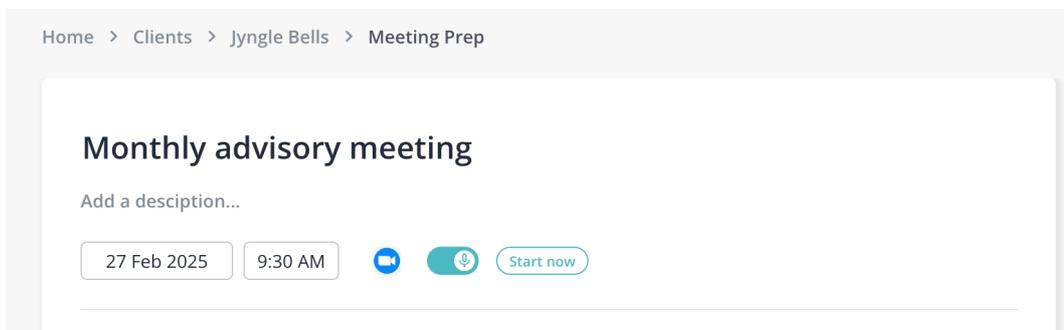
d) To remove your Zoom meeting link, hover over the Zoom icon and click on the view link icon that appears.
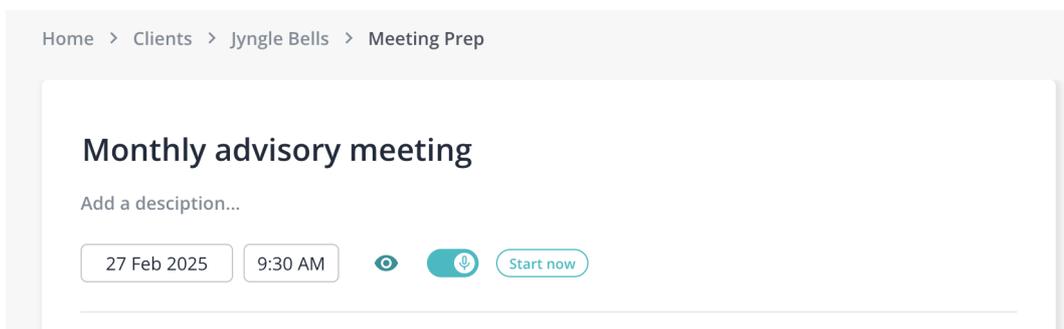
e) Click the pencil icon to edit the link.

Home > Clients > Jyngle Bells > Meeting Prep

Monthly advisory meeting

Add a desciption...

| 27 Feb 2025 | 9:30 AM | https://us06web.zoom.us/j/71111222333 | ✕ | ✏ | ⧉ |
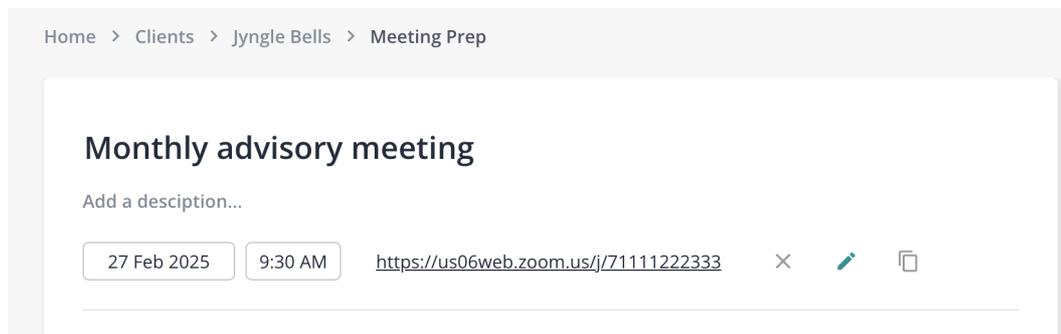
f) Finally, remove the meeting link and click the tick icon to save.

Home > Clients > Jyngle Bells > Meeting Prep

Monthly advisory meeting

Add a desciption...

| 27 Feb 2025 | 9:30 AM | Add meeting URL | ✕ | ✅ |
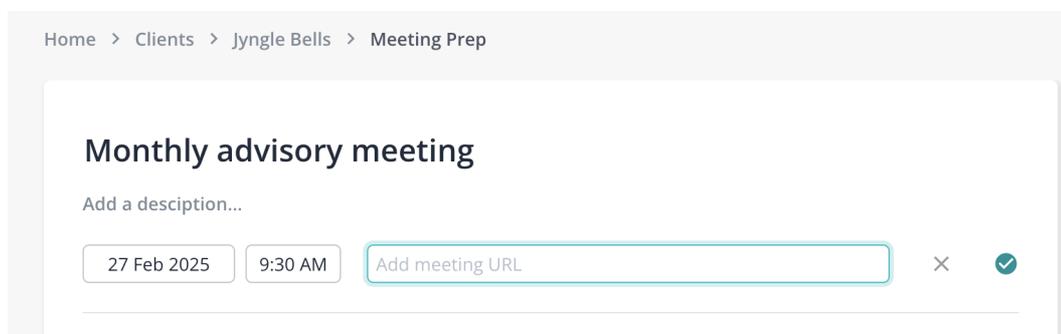
g) Your meeting link has now been removed from your meeting.

Home > Clients > Jyngle Bells > Meeting Prep

Monthly advisory meeting

Add a desciption...

| 27 Feb 2025 | 9:30 AM | 🎥 Add meeting link |
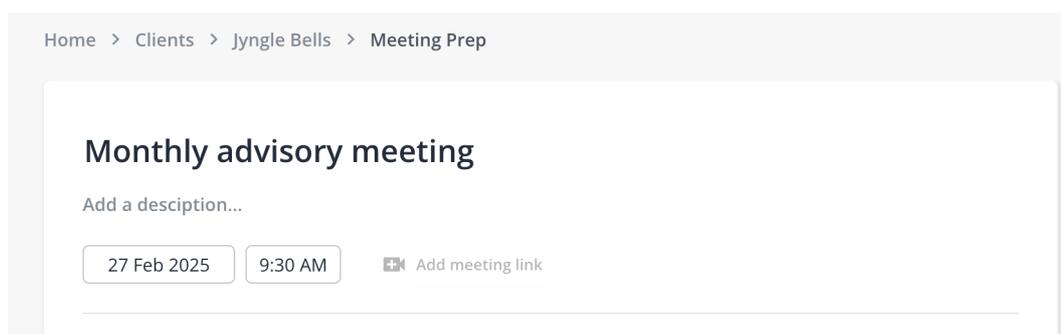
Brieff's in-app "How To" guides

For a more detailed walkthrough on using Brieff's AI notetaking feature, refer to the in-app How-To Guides, which are accessible in the app's navigation pane.

2) **Uninstallation:**

No uninstallation is required.

Brieff identifies Zoom meeting links through its Google Calendar and Microsoft Calendar integrations and automatically adds them to your meetings.

3) **Troubleshooting:**

If you require any support, please follow these steps:

i) Review Brieff's in-app "How To" guides that can be accessed from the main navigation pane.
ii) Submit a support request using this link (https://support.brieff.io/request).
iii) Contact either Kate Shanahan or Matthew Lepahe via our Slack community workspace.
iv) Reach out to us directly at kate@brieff.io or matthew@brieff.io.