

User guide: Zoom meetings in Brieff



1) Installation:

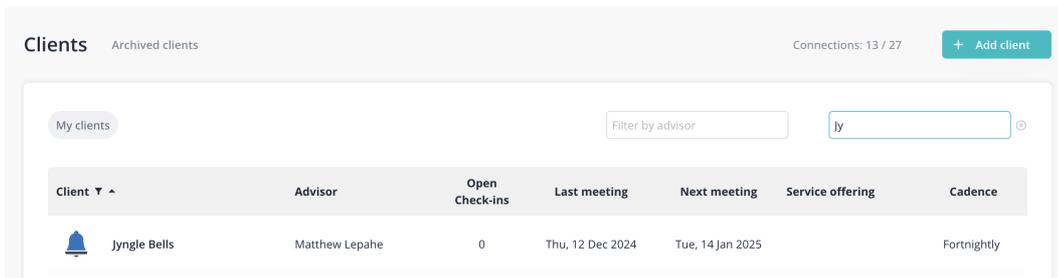
No installation is required.

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.

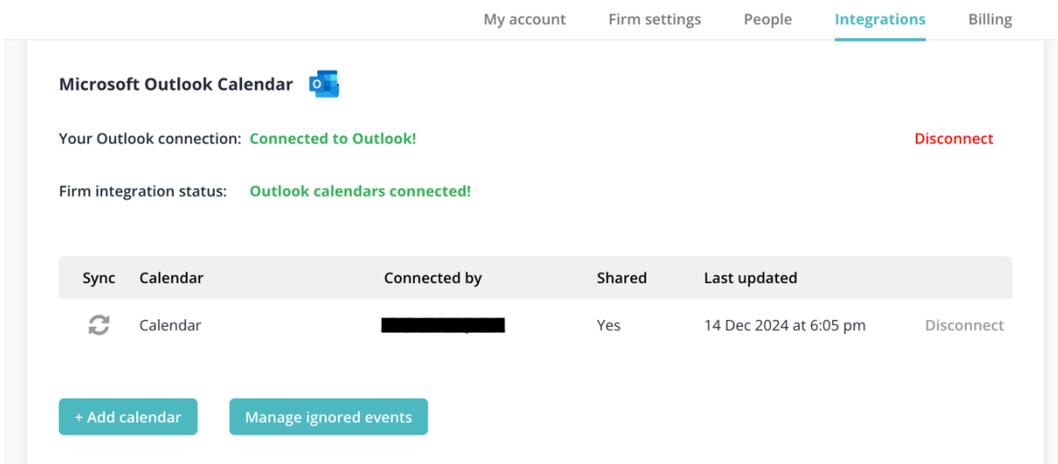
- a) Ensure you have added the client and their contacts to Brieff. The app will use client contact emails to identify which meetings need to be synced.



The screenshot shows the 'Clients' page in the Brieff interface. At the top, there are tabs for 'Clients' and 'Archived clients', and a button '+ Add client'. Below this is a search bar 'Filter by advisor' with the text 'ly' entered. A table lists client information:

Client	Advisor	Open Check-ins	Last meeting	Next meeting	Service offering	Cadence
Jyngle Bells	Matthew Lepahe	0	Thu, 12 Dec 2024	Tue, 14 Jan 2025		Fortnightly

- b) First, ensure you have a Google or Microsoft calendar integration connected to your Brieff account in Settings.

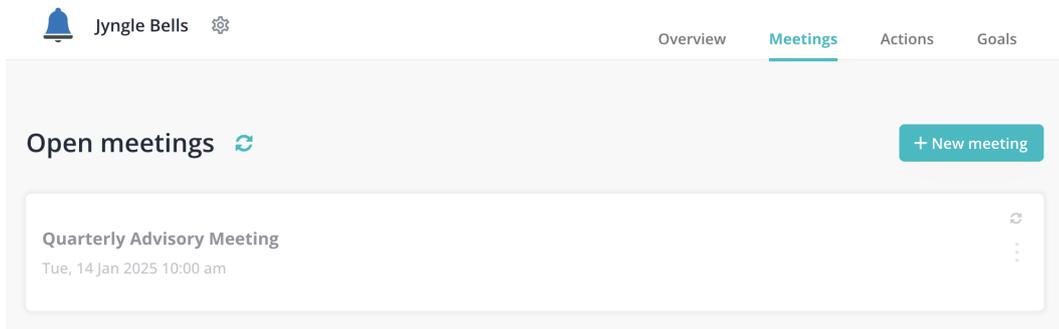


The screenshot shows the 'Integrations' page in the Brieff interface. At the top, there are tabs for 'My account', 'Firm settings', 'People', 'Integrations', and 'Billing'. The main section is titled 'Microsoft Outlook Calendar' with an Outlook icon. It shows the status: 'Your Outlook connection: Connected to Outlook!' and 'Firm integration status: Outlook calendars connected!'. Below this is a table of connected calendars:

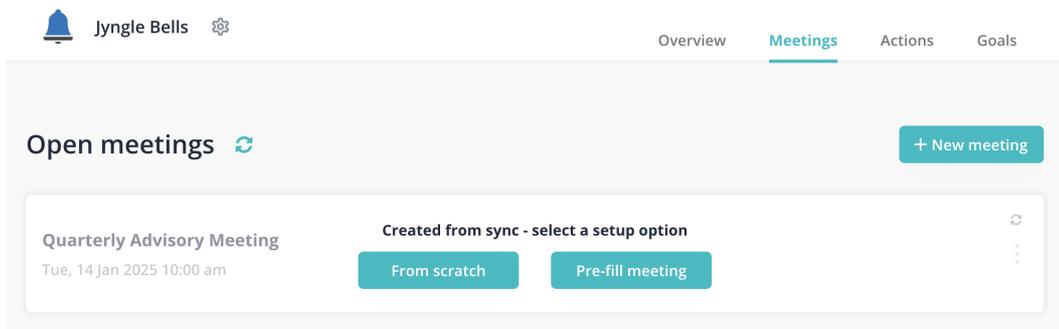
Sync	Calendar	Connected by	Shared	Last updated	
	Calendar		Yes	14 Dec 2024 at 6:05 pm	Disconnect

At the bottom, there are two buttons: '+ Add calendar' and 'Manage ignored events'.

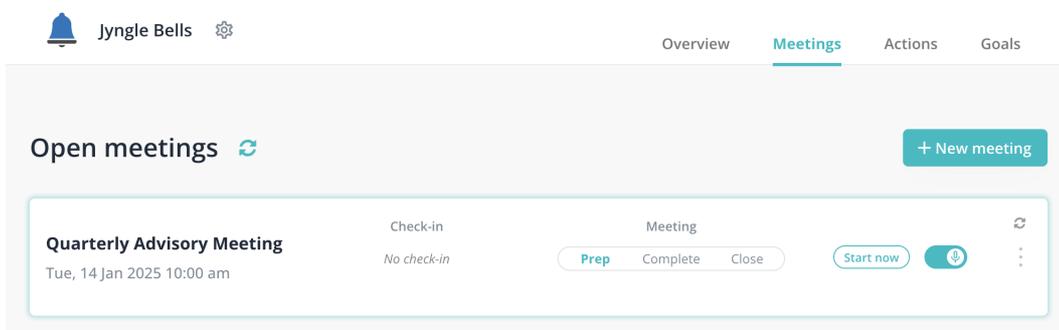
- c) Either sync your calendar from the *Settings* page or the client's *Meetings* page. The calendar integration will add/update/remove meetings to match your calendar.



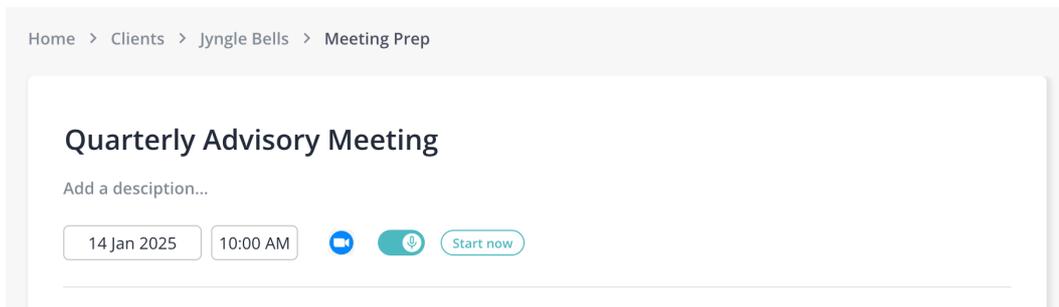
- d) You can choose to either create the meeting from scratch or pre-fill it using previous meeting information.



- 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 Brief Meeting Prep or Meeting pages.

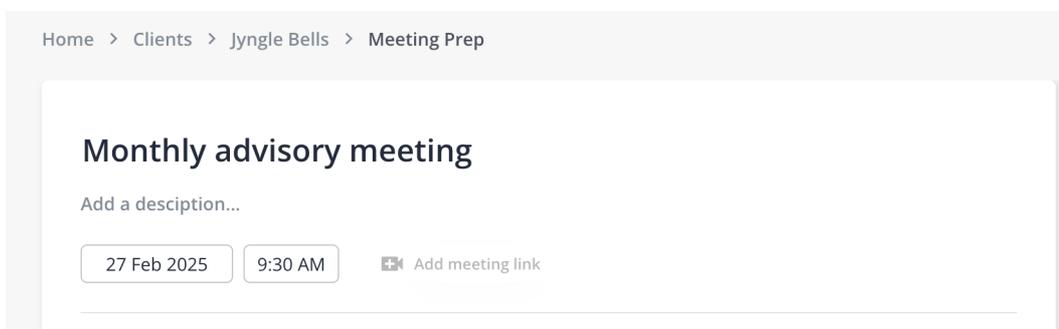


- g) You can view, edit, or copy the meeting link by hovering over the Zoom icon and clicking on the view link icon that appears.

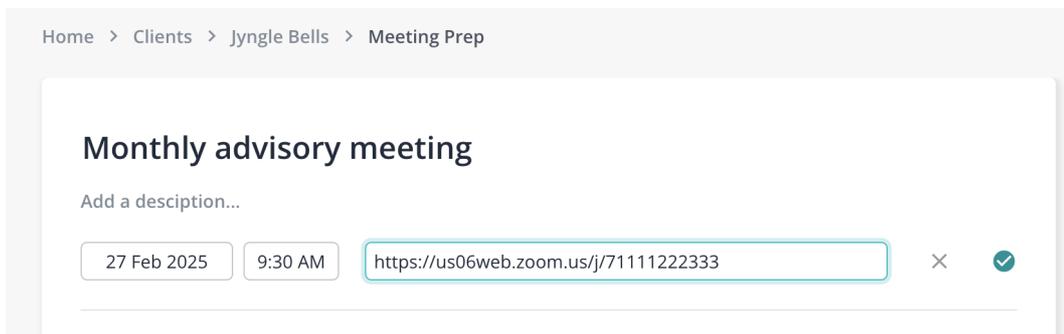


Using Zoom through Brief's Calendar integrations.

- a) When on the Meeting Prep or Meeting pages in Brief, click on the "Add a meeting link" button.



b) Enter your Zoom meeting link and click on the tick to save.



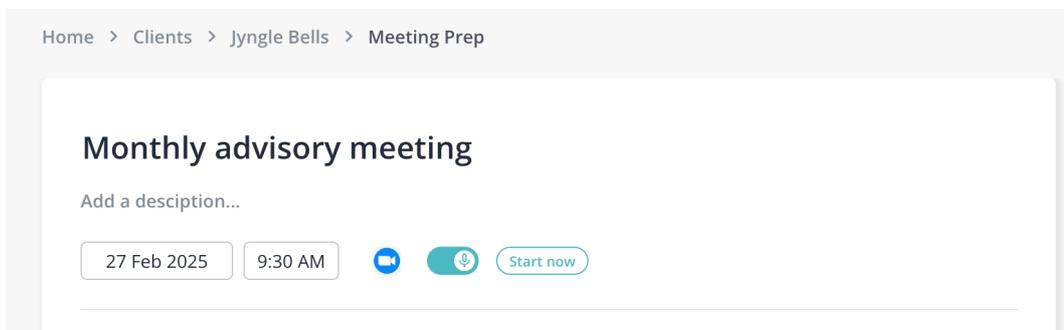
Home > Clients > Jyngle Bells > Meeting Prep

Monthly advisory meeting

Add a description...

27 Feb 2025 9:30 AM × ✓

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 Briefff.



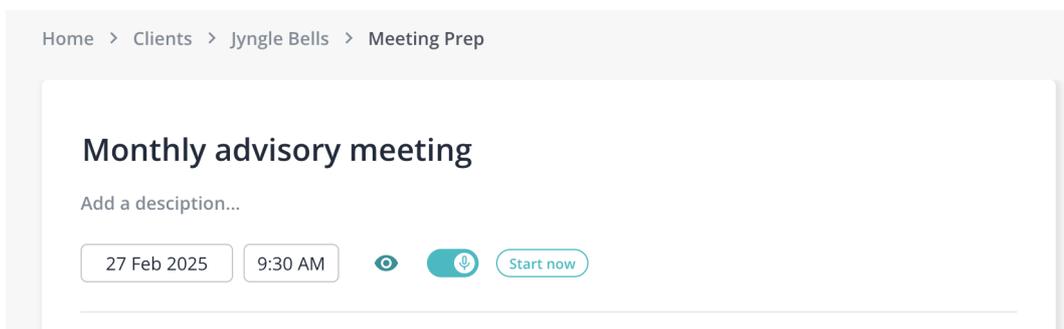
Home > Clients > Jyngle Bells > Meeting Prep

Monthly advisory meeting

Add a description...

27 Feb 2025 9:30 AM  

d) To remove your Zoom meeting link, hover over the Zoom icon and click on the view link icon that appears.



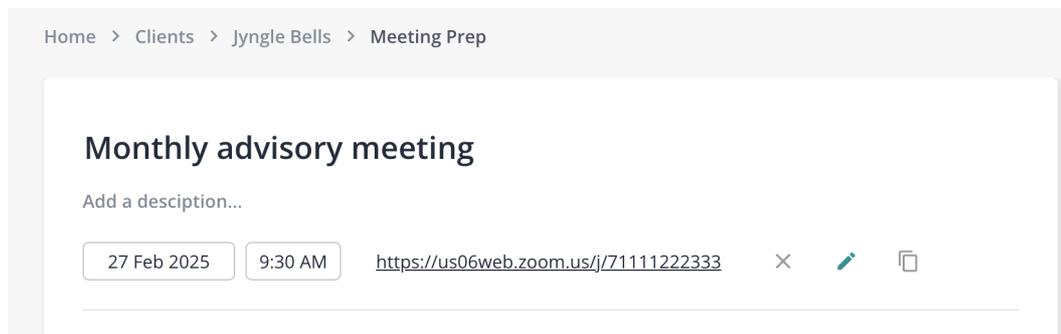
Home > Clients > Jyngle Bells > Meeting Prep

Monthly advisory meeting

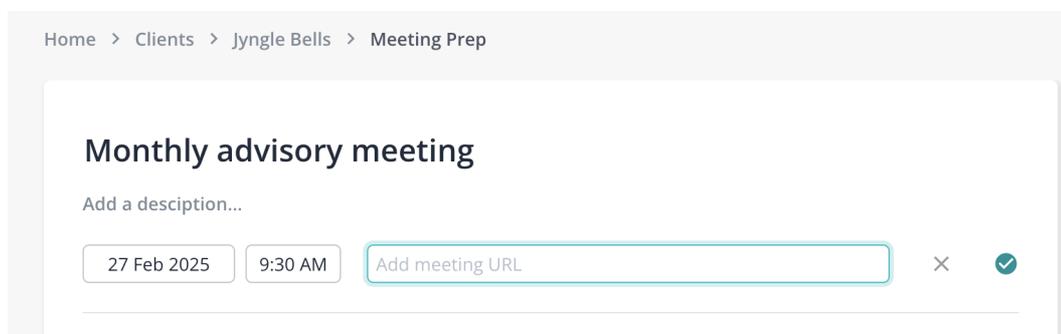
Add a description...

27 Feb 2025 9:30 AM  

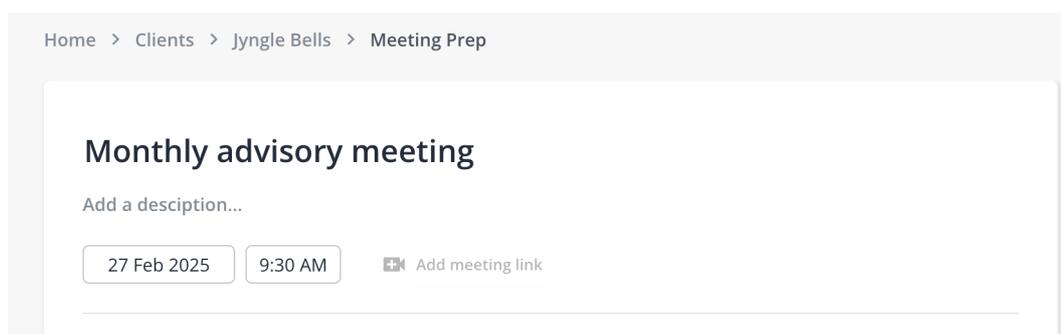
e) Click the pencil icon to edit the link.



f) Finally, remove the meeting link and click the tick icon to save.



g) Your meeting link has now been removed from your meeting.



Brief's in-app "How To" guides

For a more detailed walkthrough on using Brief'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) (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.