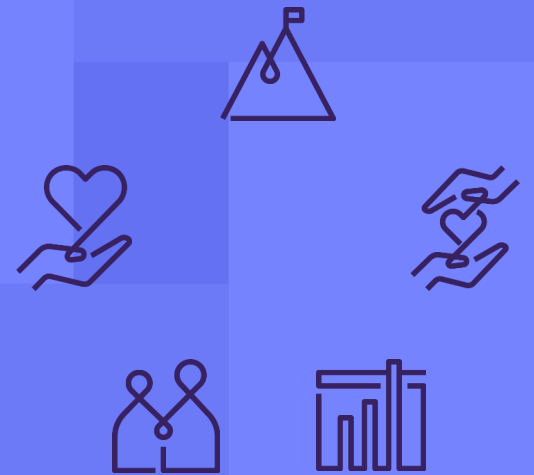


**DONOR ENGAGEMENT**

# Setting Up Your Online Event



# Meet your Trainer...

Jaime

Training Specialist

Donor Engagement

EveryAction



# Agenda

1. Set Up your Zoom Integration
2. Link to your Event
3. Data Syncing
4. Uninstalling the Zoom Integration
5. Q&A



# Setting Up Your Zoom Integration

# Setting Up Your Zoom Integration: Event Management Workflow

The Zoom integration is part of the Event management workflow. You will first need to create an Event in our system that you can then link to your Zoom meeting or webinar.

## Creating an Event

- [Event Overview](#)
- [Event Types](#)



# Setting Up Your Zoom Integration: Linking to Zoom

Once you've created your event, open the **Event Details** page and expand the Zoom integration section.

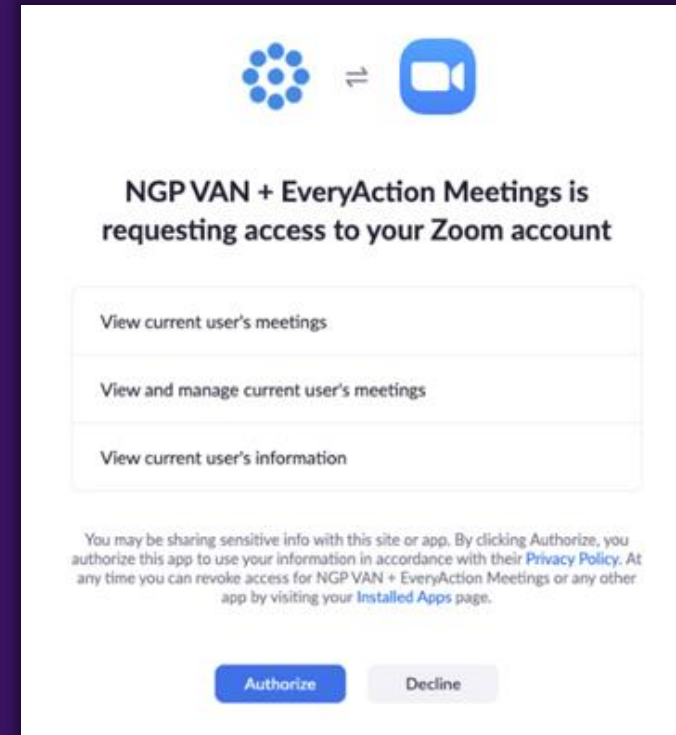
To set up the integration, choose whether you are linking to a Zoom Meeting or a Zoom Webinar.

These are separate integrations, so be sure to choose the correct type for your event.



# Setting Up Your Zoom Integration: Linking to Zoom

- The first time you link to a **Zoom Meeting or Zoom Webinar**, you will be prompted to authorize and install the integration.
- Each integration is separate, so even if you've previously approved Zoom Meeting, for example, you will still need to authorize Zoom Webinar the first time you use it, and vice versa.
- The same Zoom account can be linked to Events by multiple users, but for now, each user can only link to one account for meetings and one (identical or separate) account for webinars per committee.
- Additionally, each meeting or webinar in Zoom can only be linked to one Event.



# Linking to Your Event



# Linking to your Event

Once you have authorized the link with **Zoom**, you will see a list of your scheduled meetings or webinars.

When you return to link a future meeting or webinar, you will not need to authorize the integration again. As soon as you select **Zoom Integration > Link Meeting or Link Webinar**, you will immediately see the list of available meetings or webinars.

**Select a Zoom Meeting**

Zoom meetings include upcoming scheduled meetings and completed scheduled meetings from the past 30 days. Recurring meetings and Instant meetings cannot be linked to an event and will not display here.

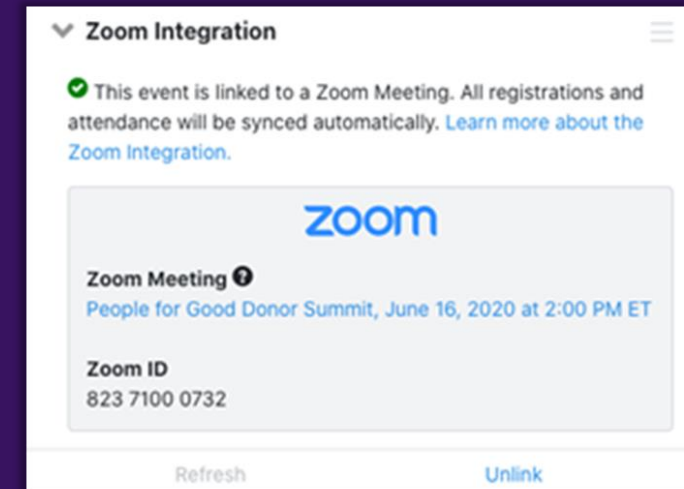
Zoom ID:  Topic:

Date From:  Date To:

Zoom ID	Topic	Date
965 617 443	Working Group 1	Apr 2 2020 9:00AM CT
629 080 858	Working Group 2	Apr 2 2020 10:00AM CT
947 652 013	Working Group 3	Apr 2 2020 1:00PM CT
626 197 908	Board Meeting	Apr 3 2020 2:13PM CT
169 902 610	Community Input	Apr 7 2020 1:00PM CT
231 751 017	Garden Host Group	Apr 8 2020 2:00PM CT

# Linking to your Event

- After selecting the **Zoom Meeting** or **Zoom Webinar** to link to your event, the **Event Details** page will reload and the **Zoom Integration** section will display the details of your **Zoom** event with a link to the **Zoom** administration page for that meeting or webinar.
- If you need to unlink or change the meeting or webinar, you can select **Unlink**. This will not remove data that has already been added, but it will stop any future syncing from occurring. You can then link to a different **Zoom Meeting** or **Zoom Webinar**.



# Data Syncing

# Data Sync from Zoom to your Event

The data synced from Zoom to your Event automatically includes:

- Tracking any changes to your meeting/webinar **Topic**, **Start Time** or **Duration** in **Zoom**. These appear as details in the **Zoom** section of your **Event**. Your **Event Name**, **Start Time**, or **End Time** will not change.
- If you are managing your registrations via **Zoom**, we will automatically sync new registrants to your **Event** signups as **Attendees** with the status **Sched-Web**.
- We run a *matching search* on all your **Zoom** registrees to see if these signups are new contacts or if they have new personal data. Any new contacts, emails, phones, and mailing addresses are automatically added to your records with a source code of **Zoom**. New emails will be automatically subscribed to your email list and marked as the preferred email for the contact. If a **Source Code** is assigned to the event, it will be marked as the **Origin Source Code** for new contacts created from the sync.

# Data Sync from Zoom to your Event

When your event ends, we will automatically use the phone numbers and email addresses from your **Zoom Participant List** to try to match the contacts in your Event signups.

- If we find a match, we will update the contact in your **Event** signup with the status of Completed.
- Nothing will be updated for contacts in your **Event** signup that cannot be matched from the **Zoom Participant List** (we will not add No Show, for example).
- Contacts that are on your **Zoom Participant List** but not on your Event signup are NOT added as new signups (we do not have enough information to match or add them as a contact). This is why your Zoom events must have registration required.

When you first link your Event to your Zoom meeting or webinar, we will sync any pre-existing registration and attendance data from Zoom to your Event. This means you can enable the integration after registration has begun for a meeting or webinar, or even after it has occurred. Please be aware that this initial sync can take a while for larger events where we must match more registrants.

You can also manually sync your Zoom data to your event by pressing Refresh on the Zoom section of the Event Details page.

# Data Sync from your Event to Zoom

Instead of using Zoom forms for registration, you can manage registration through your Event. The data we will share to Zoom includes:

- Signups for Zoom-linked Events with the statuses of Scheduled, Sched-Web, Sched-Text, and Confirmed will be added to your Zoom meeting or webinar registration list at regular intervals. You should see your signups appear on your Zoom registration within an hour (or less).
- We will only send First Name, Last Name, and Email Address to Zoom for your signups, so please make sure that only these fields are marked required on the Zoom Registration Form for the meeting or webinar. If any other fields are marked required, then registrations will not be synced to Zoom.
- If the participant signed up for the event through an Online Actions form we will send the email address to Zoom that they used on that form. If the participant was entered in another manner we will send the participant's preferred email address.
- If you have set your Zoom meeting or webinar to send confirmation emails to registrants, the email will be sent once the Event signups are added to the Zoom registration.
- You can use any of the usual methods for signing participants up for your Event, including Online Actions Event Signup forms, Online Actions Ticketed Event forms, Bulk Upload, our Event Signups API, or the Event Scheduler.
- If you are using a Ticketed Event form, only ticket purchasers are added to your Zoom registration. Ticketed Event Guests will not be included in this push.

# Uninstalling the Zoom Integration

# Uninstalling the Zoom Integration

## To uninstall:

1. Visit [Marketplace.Zoom.com](https://Marketplace.Zoom.com) and search for our App (EveryAction VAN + EveryAction)
2. From the **Manage** tab of the App page look for the **Uninstall** button
3. Select your reason for uninstall
4. Select **Grant App developer consent to retain data**
5. Click **Uninstall**

### Uninstall App

Are you sure you want to uninstall this app from your account?

Please choose your uninstall reason:

Not working    Missing key features    Require additional setup    Others

Grant App developer consent to retain data?

The developer who created this app is required to permanently DELETE any/all of your Zoom Data within 10 days of you uninstalling the app. Please review their [Privacy Policy](#), and if you choose, you may check this box to grant the developer consent to retain your Zoom data on their system according to their Privacy and Data Retention Policy



# Q&A

# Additional Resources

# Support

- Contact your System Administrator
- Email [help@EveryAction.com](mailto:help@EveryAction.com)
- Call (202) 370-8050
- Submit a Support Request Ticket from the Main Menu of the EveryAction CRM



# Help Center Resources

- [Zoom Linking and Syncing](#)
- [Zoom Best Practices](#)
- [Managing Zoom Registration Scenarios](#)
- [Set Up and Use the Zoom Integration for Your Events](#)
- [Feature Webinar: Zoom Integration](#)



# Additional Training

- Bonterra Academy:  
<https://help.everyaction.com/s/article/Bonterra-Academy-Self-Signup>
- Foundational Webinar Series
- Upcoming initiatives
- Videos in Bonterra Academy



Thank You for Attending!

