Instructions for new Zoom Integration for WellCents

Step 1: The company admin will navigate to their company page and select the "Zoom" option within the Meeting Platform Settings, highlighted below. If the company is already using Zoom for their WellCents meetings, they will have "Zoom (legacy)" selected and should change this selection to the "Zoom" option located just above the legacy option in the dropdown menu.

Meeting Platform Settings	
Platform Type *	
Zoom (legacy)	-
Select Platform Type Teams WebEx	
Zoom Zoom (legacy)	
WJZEvvOvU73JCeVqsCTgUVOdUNqTu	Jya8aRVG
	s
WellCents Meeting Setting	s
Assessments Service	✓ Meetings
✓ Interesting Reads	Action Items
Contact Advisor	Contact Us
About You	Financial Priority

Step 2: Once selected, the company admin will select "Save", and then the "Authorize" option next to the "Save" button will be available to select.

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Meeting Platform Settings			
Platform Type *			
Zoom	•		
		Save	Authorize
WellCents Meeting Settings			
 Assessments Service 	Meetings		

Important Note: For Steps 3-5 to work properly, the email address that is tied to the user's RPAG account must also be assigned an admin role within their own company's Zoom account. If the email address does not have the admin Zoom role within the company's Zoom account, the user will be met with a pop-up (see right) which indicates that they do not have permission to move forward with this action.

Zoom

Sorry, but we're having trouble signing you in.

AADSTS50105: Your administrator has configured the application Zoom (%2166ac3-7237-4cbf-9fc8-69b7c3c7f45c) to block users unless they are specifically granted (assigned) access to the application. The signed in user 'michael.feldman@nfp.com' is blocked because they are not a direct member of a group with access, nor had access directly assigned by an administrator. Please contact your administrator to assign access to this application.

Step 3: Once "Authorize" has been selected in RPAG, a separate pop-up window will appear, leading the user directly to the Zoom website. The user will then scroll down the page within this new window and select the "SSO" option.



Step 4: After "SSO" has been selected, the user will be brought to a new page where their Company Domain information should be entered before selecting "Continue". (E.g. "xyz.zoom.us")

🔜 Sign In - Zoom - Work - Microso	ft Edge			 -		×
https://zoom.us/web/ss	o/login?en=signin				,	A∥
			REQUEST A DEMO	1.888.799.9666	SUPPORT	•
	ONS ▼ RESOURCES ▼	JOIN	HOST 👻 SIGN IN	SIGN UP, IT	S FREE	s
	Sign In wit	th SSO				1
	Company Domain					
	Your company domain		.zoom.us			
	Continu	Je				
	I don't know the con	npany domair	1			
	< Back					~ "

Step 5: Once the Company Domain has been successfully entered, the user will then be directed to another page, where they should select "Allow". At this point, the company will have authorized their Zoom account. The new Zoom integration will be complete and ready to use for WellCents meetings.

7000					Circ Out
20011				RM	Sign Out
	You are about	to add WellCents	Meeting		
	1 Note				
	 App can access and manage thi This app may enable an in-meet real-time video, audio, chat, or n 	s information even when no ing notification to participar neeting files. Learn more	ot using the app. nts if the app is used to	access	
	App can view information				
	Associated with your account and others	you're allowed to access			
	Settings			>	N
	A Profile & Contact Information	i.		>	13
	Associated with your account, others you	re allowed to access, and o	others included in that		
	By clicking Allow, you give permission to this app to	o use your information in accord	ance with their Terms & Priv	acy Policy.	