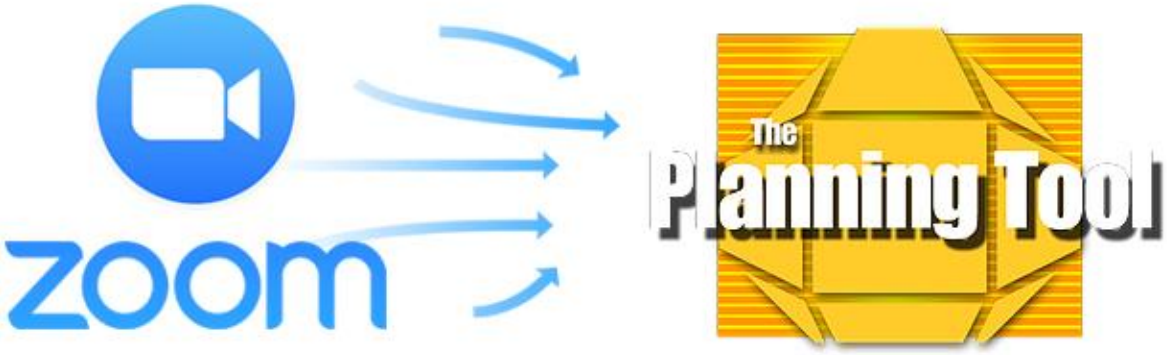


Zoom Integration

About Zoom Integration with The Planning Tool

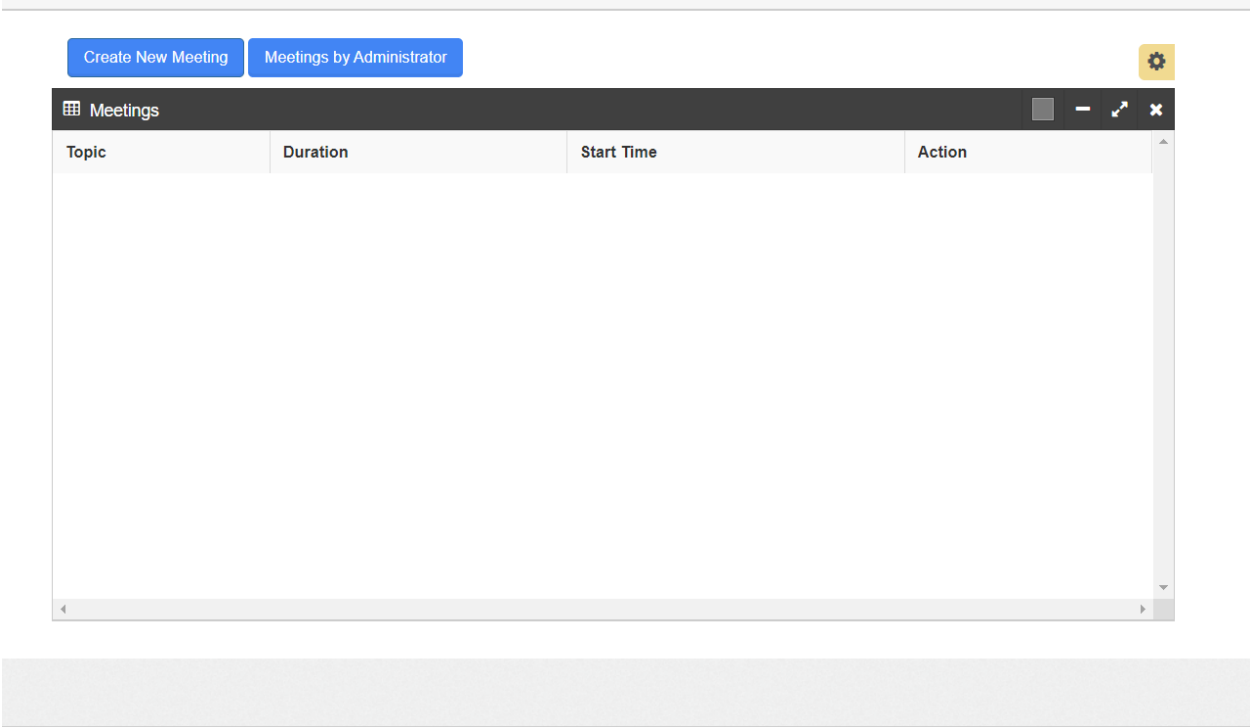
The Planning Tool drives engagement by harnessing effective mentorship through an ALL-IN-ONE Platform and enabling meeting attendees to actively participate through virtual meetings powered by ZOOM. Professionals can also take advantage of The Planning Tool's functionality to host interactive presentations as part of its offering, providing the tools to create presentations that engage, connect and inspire youth on Zoom.

The Zoom Feature must be activated by the System Admin. Users should email support@theplanningtoolapp.com to request zoom activation. Only the main User Account can manage Zoom Meetings, Admin users may join zoom meetings but not create or manage zoom meetings.

Zoom Integration Functions:

- Create Instant meeting or schedule meetings for future date/time.
- Send invites via email to members
- Add future meeting to Planning Tool calendar
- Send reminders
- Start meetings from The Planning Tool App
- Members join from invite links or from The Planning Tool App

Choose the Zoom Icon at the top of Dashboard screen or go to **Create Task > Zoom Meetings**

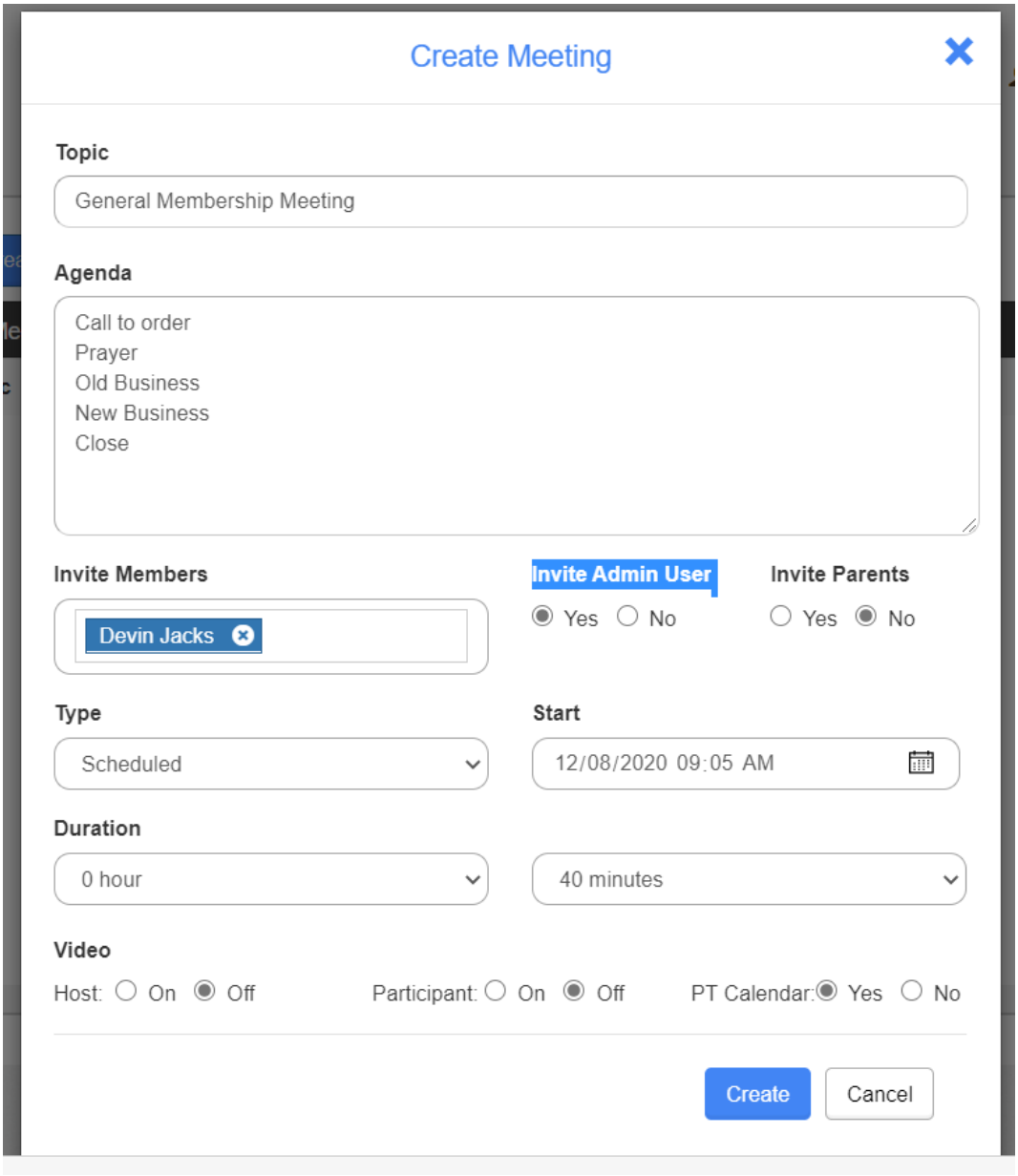


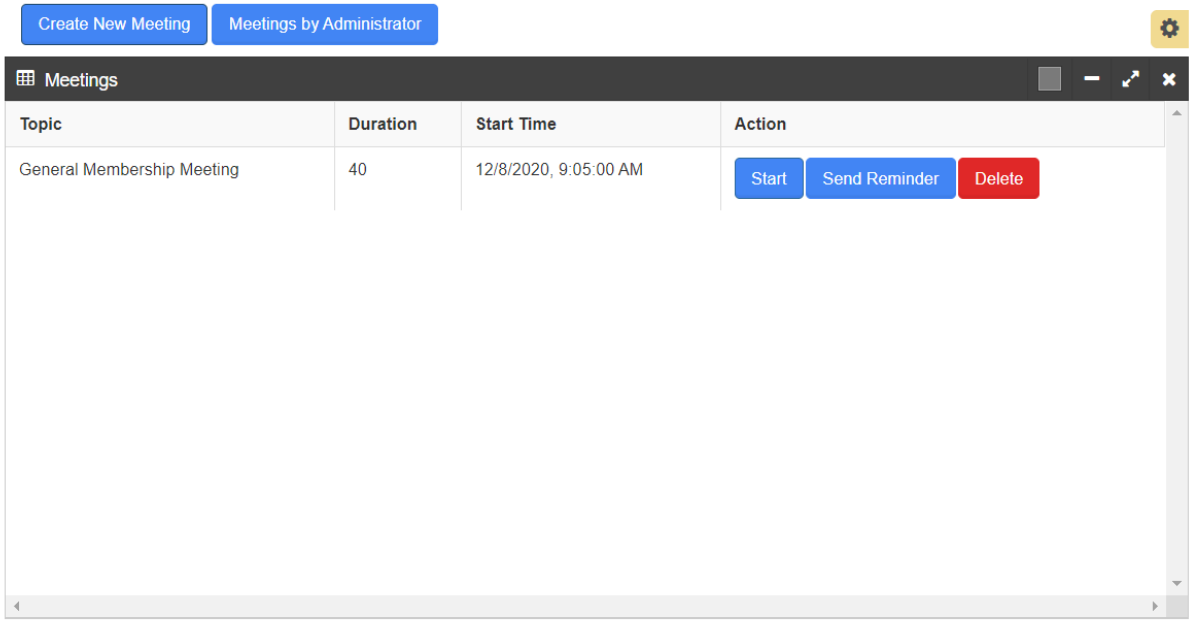
Enter the require information for your Zoom Meeting (Topic, Agenda, Date, Time)

You can invite ALL Members by leaving the Members selection area blank.

- Choose if you want to invite the selected member's parents.
- Invite Admin Users (assist directors).
- Video Options (ON or OFF) when joining
- PT Calendar- Option to place the meeting on the Calendar for your organization.

The Planning Tool system will automatically trigger email invitations sent to all participants selected along with parents and admin users in option selected.



The new meeting is listed in upcoming meetings with options to

- Start – Zoom App will open and meeting will start
- Send Reminder – Reminder invites will be sent via email to all invited participants
- Delete- Meeting will be deleted from the system