

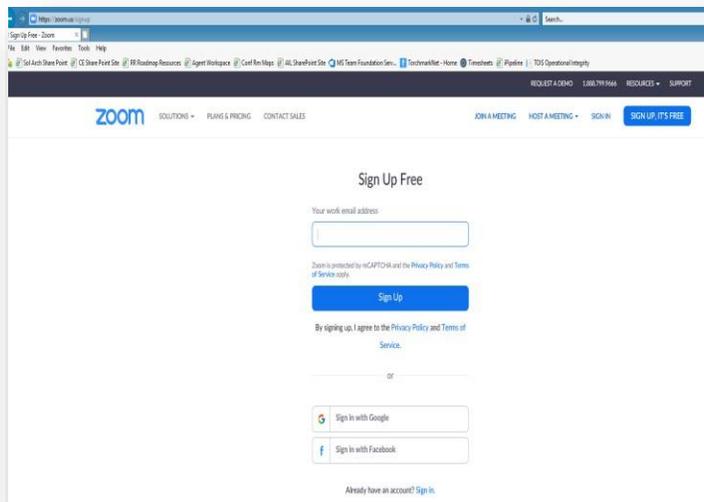
GETTING STARTED WITH ZOOM

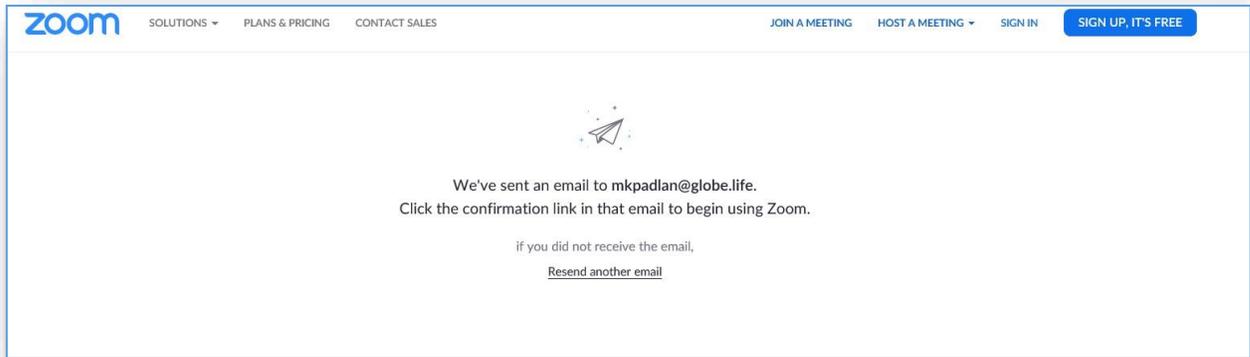
The following will instruct an agent on how to:

1. Create a Zoom account
2. Schedule a meeting for a specific time
3. Start a meeting on demand
4. Change Zoom video settings in order to allow customers to hear the eApp presentation

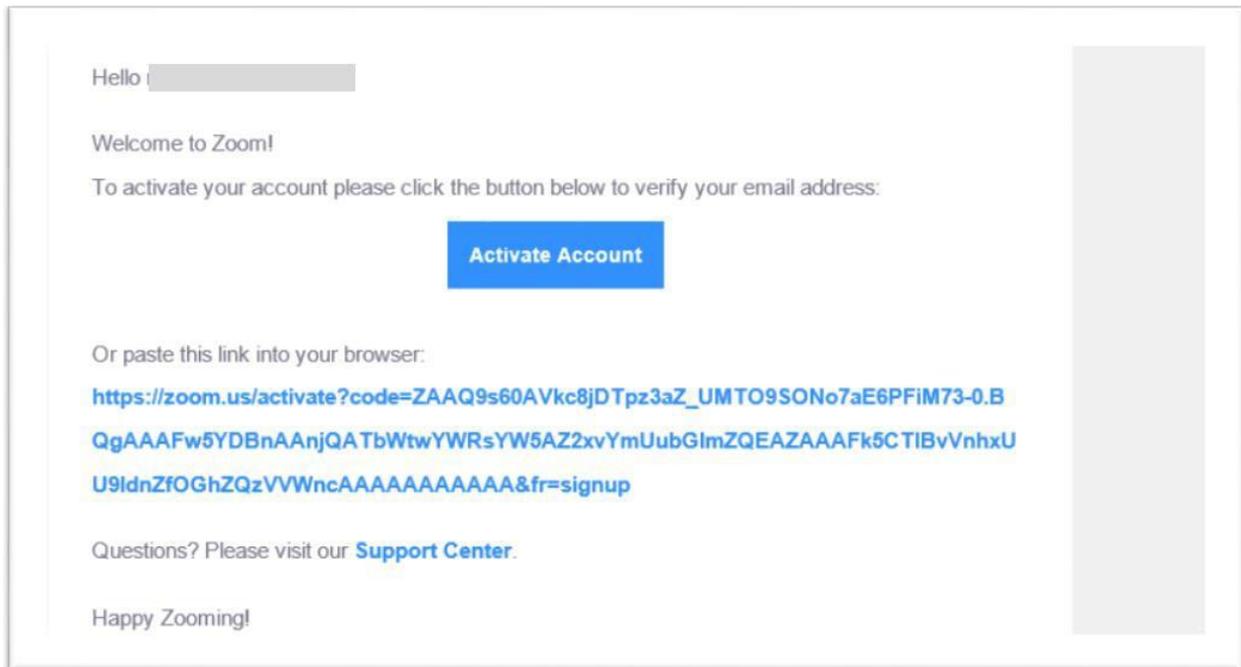
1. Create a Zoom account

- a. Sign up using this link: <https://zoom.us/signup>





- b. The agent should check their email for an email from **Zoom no-reply@zoom.us**
- c. The agent should click the "Activate Account" button, as shown below



- d. After the account is activated, the agent will see a similar screen below. The agent should enter their first and last name, then create a password. This completes creating a Zoom account.

1 Account Info ---- 2 Invite Colleagues ---- 3 Test Meeting



Welcome to Zoom

Hi, mcpadlan@globe.life. Your account has been successfully created. Please list your name and create a password to continue.

First Name

Last Name

Please enter your last name

Password

Password must:

- Have at least 8 characters
- Have at least 1 letter (a, b, c...)
- Have at least 1 number (1, 2, 3...)
- Include both Upper case and Lower case characters

Password must NOT:

- Contain only one character (11111111 or aaaaaaaaa)
- Contain only consecutive characters (12345678 or abcdefgh)

Confirm Password

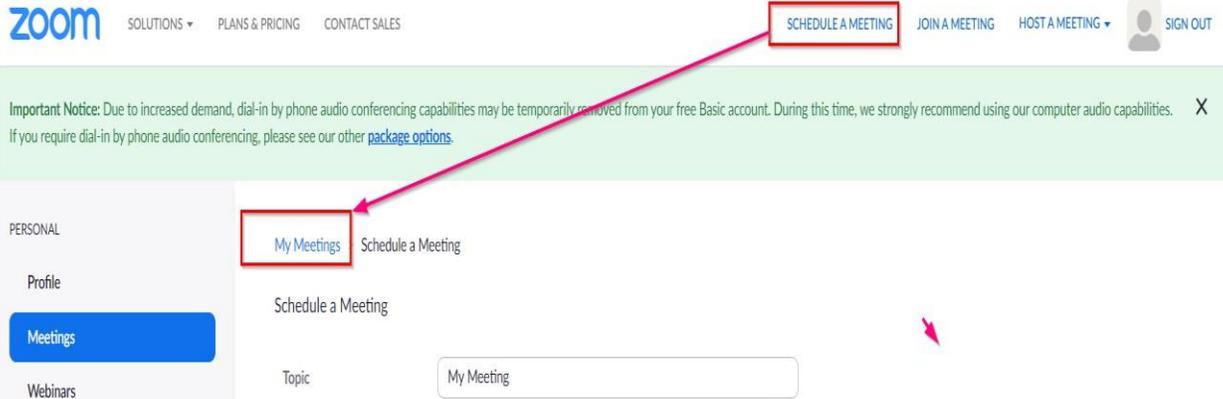
2. Schedule a meeting for a specific time.

- a. The agent can click on "SCHEDULE A MEETING" for a specific time.

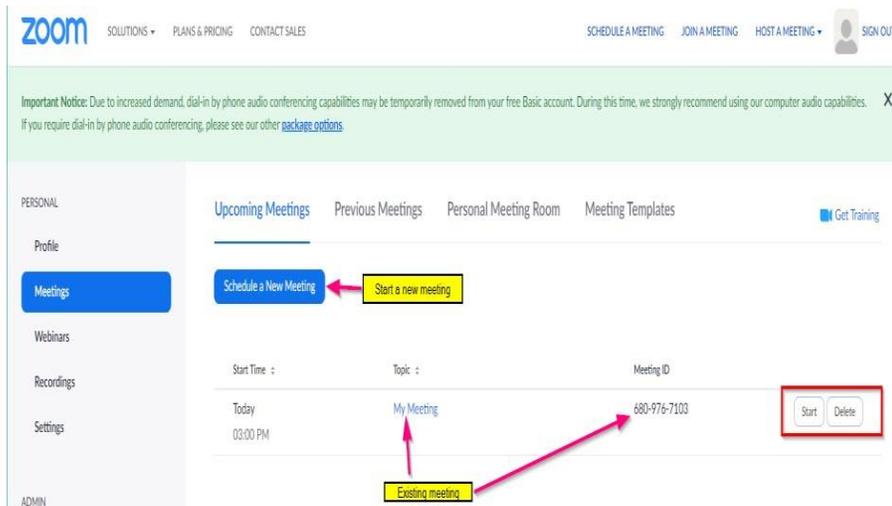
zoom SOLUTIONS ▾ PLANS & PRICING CONTACT SALES SCHEDULE A MEETING JOIN A MEETING HOST A MEETING ▾ SIGN OUT

Important Notice: Due to increased demand, dial-in by phone audio conferencing capabilities may be temporarily removed from your free Basic account. During this time, we strongly recommend using our computer audio capabilities. If you require dial-in by phone audio conferencing, please see our [package options](#). X

On selecting "SCHEDULE A MEETING", the following page is displayed



Select the menu item **“My Meetings”**. This will display any meetings that are scheduled, if any.



If the **“Schedule a New Meeting”** is clicked, the following is displayed. Enter the necessary data.



My Meetings > Schedule a Meeting

Schedule a Meeting

Topic

Description (Optional)

After scheduling this meeting, the settings you change here will apply to all scheduled meetings with the Personal Meeting ID. [Revert Settings](#)

When

Duration hr min

Your Zoom Basic plan has a 40-minute time limit on meetings with 3 or more participants. Upgrade now to enjoy unlimited group meetings. [Upgrade Now](#)

Do not show this message again

At the very bottom make sure to click the Save button

Meeting Options

- Enable join before host
- Mute participants upon entry
- Enable waiting room
- Record the meeting automatically on the local computer

After saving, the following screen is displayed providing the information on the meeting that was just created. There is a link to copy the web address for the meeting and send the link to the customer via email.



At the bottom there is a button to start the meeting immediately after the email has been sent.

My Meetings > Manage "Meeting with Mr. Mickey Mouse"

Start this Meeting

Topic Meeting with Mr. Mickey Mouse

Description To discuss Life Insurance

Time Mar 17, 2020 01:00 PM Pacific Time (US and Canada)

Add to Google Calendar Outlook Calendar (.ics) Yahoo Calendar

Meeting ID 680-976-7103

Meeting Password × Require meeting password

Join URL: https://zoom.us/j/6809767103 Copy the invitation

Video Host Off
Participant Off

Audio Telephone and Computer Audio

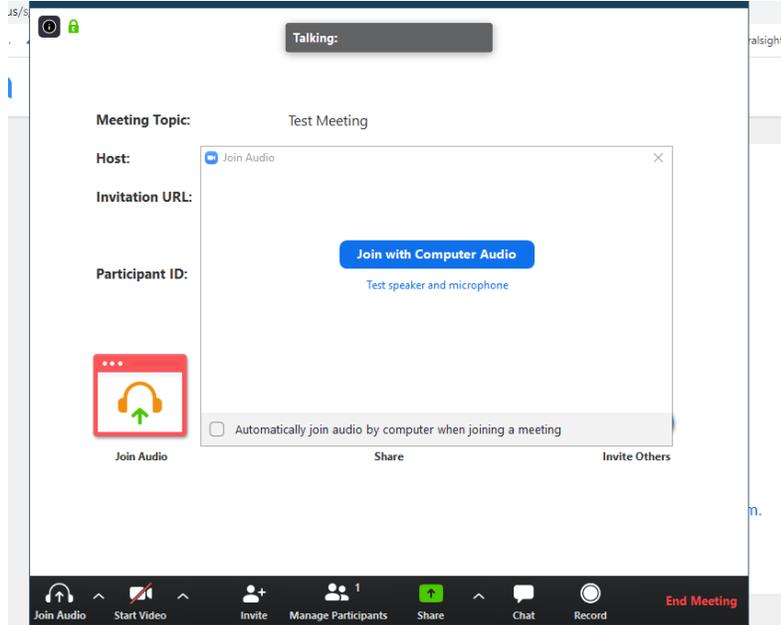
Dial from

Meeting Options

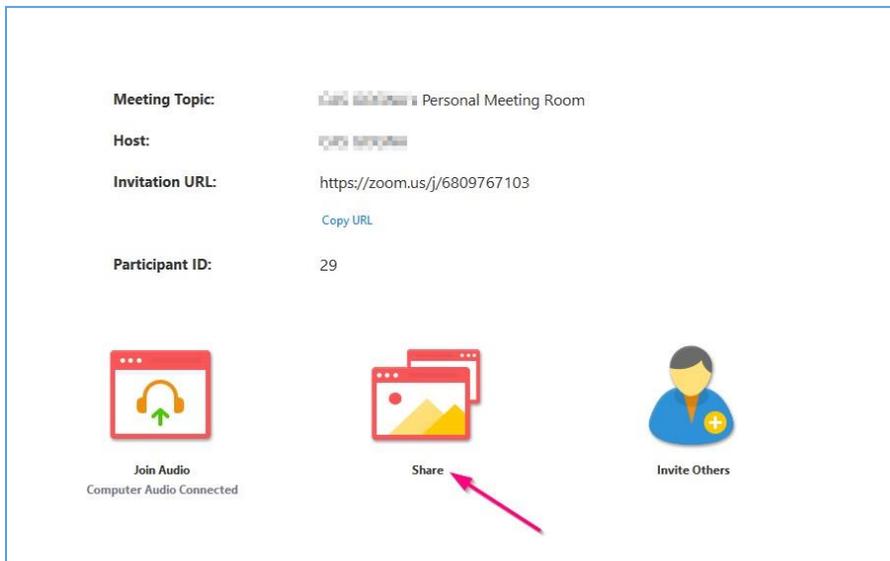
- ✓ Enable join before host
- × Mute participants upon entry
- × Enable waiting room
- × Record the meeting automatically on the local computer

Delete this Meeting Edit this Meeting Start this Meeting

3. If the "Start this Meeting" is selected, the meeting will start by showing the following screen. Click on "Join with computer Audio" button.



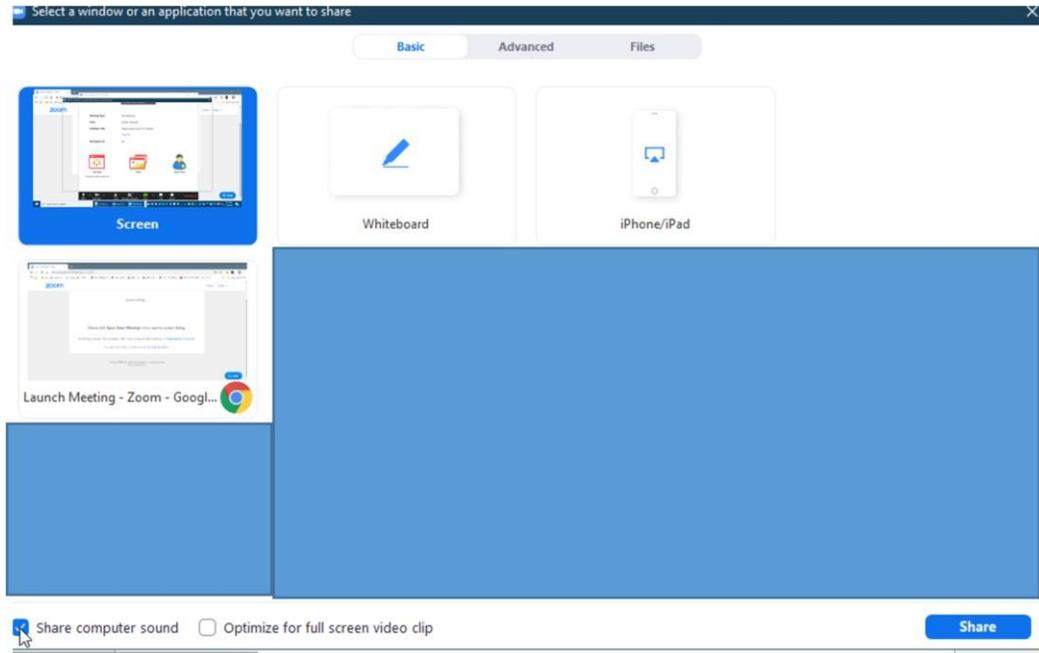
4. Select the "Share" icon.



5. You can then select the screen you want to share.

After clicking “Share”, please make sure to select “Share computer sound” option at the bottom of the screen as shown below. Select the screen to share that the customer will be viewing the EApp.

Please ensure no pop-ups or application are blocking the presentation.



6. Once the customer receives the email from the agent, the customer will need to click the link to the meeting that is in the email.
 - If the customer is using a laptop, the customer will be directed to the meeting.
 - If the customer is using a tablet, they may need to install the Zoom app on their device.

Zoom Help

For additional assistance with Zoom, you can do so by clicking the link:

<https://support.zoom.us/hc/en-us/articles/214629443-Zoom-Web-Client>