Irish Life

MEETING YOUR CLIENTS REMOTELY

ZOOM GUIDE

Hi there,

At Irish Life, we pride ourselves on helping you and your clients build better futures. We are here and ready to make sure we continue to provide you **with** the support you need to grow and develop your business.

We are committed to supporting you with remote working. The value of advice to your clients is more important now than ever. That's why we've created this guide to help you meet your clients. This guide focuses on Zoom, but we have guides for other video conferencing applications you can use. There are also other video conferencing applications available - these are just some examples.

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SETTING UP A ZOOM ACCOUNT

To set up a Zoom account, simply go to their website. You can sign up for a basic plan for free, or sign up to their other packages.

You can find **o**ut more about their pricing plans here.

Once you've signed up, you'll need to activate your account. Check your email for an activation email from Zoom.

After activating your account, you're ready to go.

Once you have set up your Zoom account, you can update your profile. You can add in your photo, update your password and more. Adding a profile photo allows your clients to see your selected photo, should your video be turned off during a meeting.

To do this, make sure you are signed in to your Zoom account through the internet, and click on Profile.

To find out more about updating your profile, you can look at Zoom's guide for new users.

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SETTING UP A MEETING WITH YOUR CLIENT

To set up a meeting with your client, simply click on Schedule a Meeting on Zoom for web or click on the **Schedule** button on your chosen Zoom app.

When scheduling **your meeting**, **you** will be prompted to **enter** a **Topic**. The default setting is **My Meeting**.

Take Note **The topic you put on your meeting will appear as the subject for you and your client, so make sure that you create an appropriate meeting title.**

You can also put in a **Description** for your meeting if you are using Zoom for web. This is optional.

You will also be prompted to put in a **Date, Time** and **Duration** for your meeting. The default duration is set at 30 minutes or 1 hour.

Take Note **If you have a basic plan, a meeting with more than three participants is capped at 40 minutes.**

You will be given an option whether to set a meeting password or not. This decision is up to you. For security purposes, a meeting password is advisable. The default option is a password generated for you.
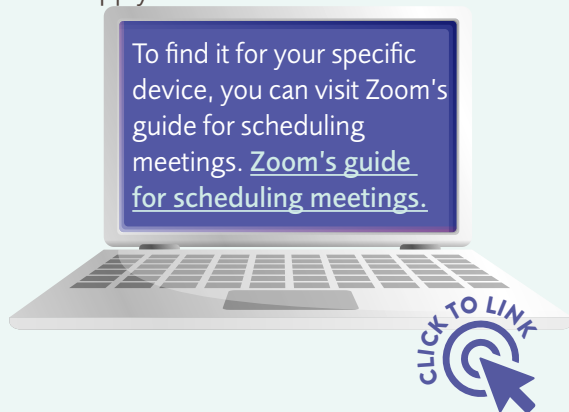
Finally, you have several **Video, Audio** and **Meeting options** (under Advanced Options on Zoom apps) available to you. Choose your preferred option and click on **Save**.

By clicking choosing the **Enable waiting room** option, your client will be allowed to wait in the waiting room until you have started the meeting.

To send this Zoom meeting to your clients, click on one of the calendar options available. Your chosen calendar and email app (Google Calendar and Gmail, Outlook or Others) will open and you can send the calendar invite to your clients.

Setting up Zoom meetings can be different for which app you use.

To find it for your specific device, you can visit Zoom's guide for scheduling meetings. Zoom's guide for scheduling meetings.

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Video	Host	◉ on ○ off
	Participant	◉ on ○ off
Audio	○ Telephone ○ Computer Audio ◉ Both	
	Dial from Edit	
Meeting Options	☐ Enable join before host	
	☐ Mute participants upon entry	
	☑ Enable waiting room	
	☐ Record the meeting automatically on the local computer	

Save   Cancel

RE-SCHEDULING OR CANCELLING YOUR MEETINGS

If you have to re-schedule your meeting with your client, you can reschedule using your chosen Calendar & Email app. You can also go to your chosen Zoom app, click on the meeting you need to reschedule, and click on **Edit**.

To cancel your meeting with your client, simply go to your meetings and click **delete**.

SENDING YOUR CLIENTS THE MEETING INVITE

When setting up the meeting on Zoom, you have the option to add this through your chosen calendar and email app. This will automatically allow you to send the invite to your clients.

You can also copy and paste the invite link, which contains the meeting URL, Meeting ID and Meeting Password.

CLIENTS JOINING THE MEETING

Your clients have two options for joining a meeting. You know your clients best, so you can recommend an option for clients who are unfamiliar with Zoom.

OPTION 1:
JOIN THE MEETING THROUGH ONE OF THE ZOOM APPS

Your clients can download and register an account with Zoom, or if they have an existing account all they need to do is click on **Join** and enter the Meeting ID and Password.

OPTION 2:
JOIN THE MEETING THROUGH MEETING URL

If your client doesn't have an account, they can join through the **Meeting URL** provided on the invite.

USEFUL RESOURCES

If you are having any problems, there are many resources available online from Zoom which can help you further.

Zoom help centre

User-start guide for beginners

User Tutorial Videos by Zoom

Zoom Security and Privacy Policy

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