Zoom for consultations

Connect your own Zoom account so that online consultations booked through RCIC App get a Zoom meeting created automatically. This guide covers adding the app, using it day to day, and removing it, plus what we send to Zoom and what we never send.

Up to date as of v1.32.0

CONTENTS

• Overview
• Adding the app: connecting Zoom
• Using the app: meetings on your bookings
• Your Zoom plan and its limits
• Removing the app: disconnecting Zoom
• Troubleshooting

Overview

When a client books an online consultation, someone has to create the video meeting and get the join link to the client. Connecting Zoom lets RCIC App do that for you: the meeting is created the moment the booking is confirmed, and the join link goes into the client's confirmation email, the booking record, and your calendar event.

Zoom is connected per consultant, not per firm. Each member of your team connects their own Zoom account from their own settings. A booking uses the Zoom account of the consultant the booking belongs to, so meetings are created under the right host and appear in that consultant's own Zoom account.

You stay in control of your Zoom account. We never create an account for you, never change your Zoom plan, and never access your recordings, transcripts, participant lists, or meeting history. You can disconnect at any time, from either side.

Adding the app: connecting Zoom

Where to start. Sign in to RCIC App and go to Settings, then Integrations, then Video conferencing. You will find a Zoom card with a Connect button. Each consultant does this for their own account; an Owner cannot connect Zoom on someone else's behalf.

Clicking Connect sends you to Zoom's own sign-in and consent screen. You sign in to Zoom directly, on Zoom's website. We never see your Zoom password.

What Zoom will ask you to approve, and why each item is needed:

- **View and manage your meetings** (meeting:write:meeting) so a meeting can be created when a client books an online consultation.
- **Update your meetings** (meeting:update:meeting) so the same meeting can be moved when a booking is rescheduled, instead of issuing a new link the client does not have.
- **Delete your meetings** (meeting:delete:meeting) so the meeting is removed from your Zoom account when a booking is cancelled, rather than sitting there as a live joinable link.
- **View your user information** (user:read:user) so we can show you which Zoom account is connected. We read the account email address only, so you can confirm you linked the right account.

After you approve, Zoom returns you to RCIC App and the card shows Connected along with the email address of the linked Zoom account. Check that address before you move on.

If the wrong Zoom account is connected. This is easy to do if you hold more than one Zoom account, for example a personal one and a firm one. Zoom's consent screen signs you in as whichever account is already active at zoom.us, and it does not offer a chooser, so disconnecting and connecting again on its own will simply reattach the same account. Do all three steps in order: click Disconnect on the Zoom card, go to zoom.us in the same browser and sign out there, then come back and click Connect. You will get Zoom's sign-in screen this time, and can enter the account you meant to use.

What we store. An access token and a refresh token issued by Zoom, encrypted at rest with a key unique to your organization. These let us act on the permissions you approved. Nothing else from your Zoom account is stored.

Using the app: meetings on your bookings

Which bookings get a Zoom meeting. A booking gets a Zoom meeting when the service is set to create a meeting automatically, the client chose the online option, and Zoom is the provider that applies to that booking. A service can pin a specific provider, or it can follow the assigned consultant's default choice. Services set to use a fixed meeting link you typed yourself, or set to no meeting at all, are left alone.

Where the join link appears. Once the booking is confirmed, the same join link goes to the client's confirmation email, the booking record in your dashboard, and the calendar event on your connected calendar. The client does not need a Zoom account to join.

Rescheduling. When a booking moves, we update the existing Zoom meeting rather than creating a new one. The original link keeps working, which matters because the client may still be holding the link from their first confirmation email.

Cancelling. When a booking is cancelled, the meeting is deleted from your Zoom account, so a cancelled consultation does not leave a joinable link behind.

Meeting settings we apply. Meetings are created as scheduled meetings with the waiting room off and join before host on, so a client who arrives early is not left staring at a holding screen. No registration is required of the client.

If nothing is connected. The booking still goes through. It simply has no video link attached, and you can add one manually to the booking. A missing integration never blocks a client from booking.

What we send to Zoom, and what we never send. We send the meeting topic, start time, duration, and time zone. The topic is the name of the service being booked, such as Initial consultation, not the client's name. We do not send client names, contact details, immigration case details, notes, or documents to Zoom.

Your Zoom plan and its limits

Your Zoom plan still governs the meeting. RCIC App creates the meeting in your Zoom account, but it does not change what that account is allowed to do. The meeting's maximum length and its participant cap come from the plan on the connected Zoom account, exactly as they would if you had created the meeting yourself in Zoom.

A free Zoom plan carries Zoom's own duration and participant limits. Those limits are Zoom's, not ours: we neither lift them nor add any of our own.

Check the plan before you book a long or large session. If you run consultations that go past your plan's meeting length, or group sessions with more attendees than your plan allows, the meeting will be created and it will hit Zoom's limit while you are in it. The fix is on the Zoom side: upgrade the plan on the connected account, or use a service with a fixed meeting link pointing at a room that suits the session.

Which account's plan applies. The plan that matters is the one on the Zoom account attached to the consultant the booking belongs to. In a team, two consultants can be on different Zoom plans, and each of their bookings follows their own.

Removing the app: disconnecting Zoom

You can remove the connection from either side, and both paths delete the Zoom credentials we stored.

From inside RCIC App. Go to Settings, then Integrations, then Video conferencing, and click Disconnect on the Zoom card. The stored access and refresh tokens are deleted immediately. New bookings stop getting Zoom meetings from that moment.

From your Zoom account. Sign in to the Zoom App Marketplace, open Manage, then Added Apps, find RCIC App, and click Remove. Zoom notifies us that you withdrew consent, and we delete the stored tokens on our side as well. You do not need to also disconnect inside RCIC App; either action is sufficient.

What removal does not do. Meetings that already exist in your Zoom account stay there, and links already sent to clients keep working, because those meetings live in your Zoom account rather than ours. If you want an upcoming meeting gone, cancel the booking before you disconnect, or delete the meeting in Zoom afterwards. Your bookings, clients, and records in RCIC App are unaffected.

Reconnecting. Connect again at any time from the same card. You will be asked to approve the same permissions again.

Troubleshooting

The card says the connection needs attention. Zoom access expires if it goes unused for a long period, or if the account password or permissions change on Zoom's side. Click Reconnect on the Zoom card and approve again. Your previous bookings are unaffected.

A booking came through with no Zoom link. Check three things in order: that Zoom is still shown as connected on your Video conferencing card, that the service is set to create a meeting automatically rather than using a fixed link, and that the client actually chose the online option when booking. If all three look right, open the booking and add a link manually so the client is not left waiting, then contact us.

The meeting is in the wrong Zoom account. Meetings are created in the account of the consultant the booking belongs to. If a booking landed with a colleague's Zoom account, check who the service is assigned to. Disconnecting and reconnecting with a different Zoom account changes future bookings only, not meetings that already exist.

You need to add a link by hand. Open the booking in your dashboard and set the meeting link there. This works whether or not Zoom is connected, and is the fastest fix when a client is waiting.

Still stuck. Write to info@investatech.com with the booking reference and what you expected to happen. Please do not include client documents in the email.