



Getting Started Guide

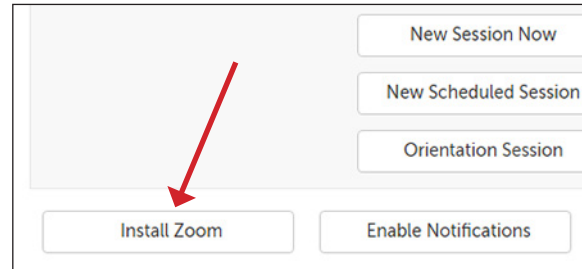
SecureVideo with Zoom

A. Setting Up

Download our videoconferencing app

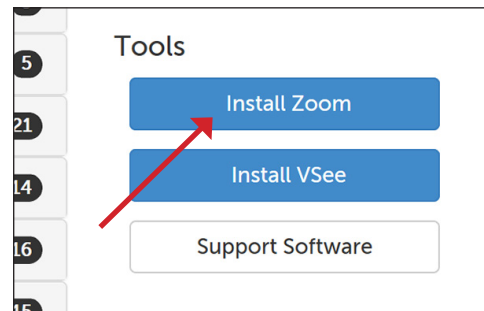
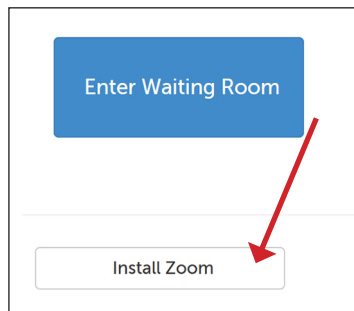
To use SecureVideo, a videoconferencing application called Zoom must be installed on the device you will use to participate in a session. This process only needs to be done once per device.

1. Account holders can use the **Install Zoom** button in the lower left-hand corner of the **Dashboard** (image right).



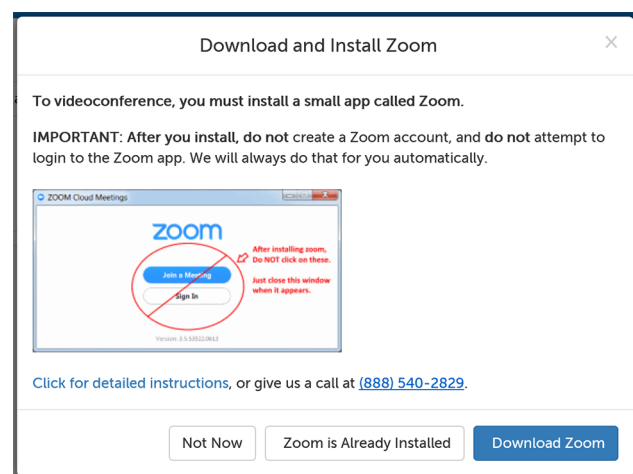
Session participants can find the **Install Zoom** button in two places:

the lower left-hand corner of the waiting room page (image below, left) or the lower right-hand corner of [the Support page](#) (image below, right).



2. Click on **Download Zoom** on the message that appears, and install it like any other app on your device. For browser- and platform-specific instructions, use the **Click for detailed instructions** link.

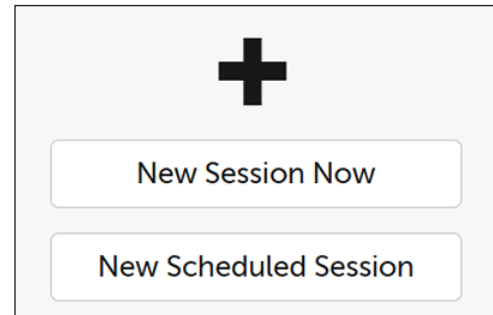
Once you have installed Zoom, you don't need to open the application. **Always log into your account from the website**, and it will launch Zoom for you. (You cannot log into Zoom directly.)



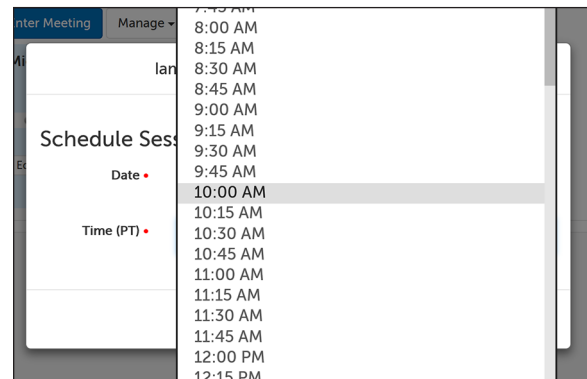
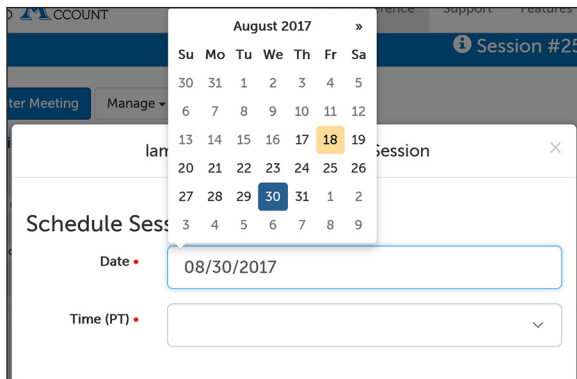
B. Hosting a Session

Schedule a session

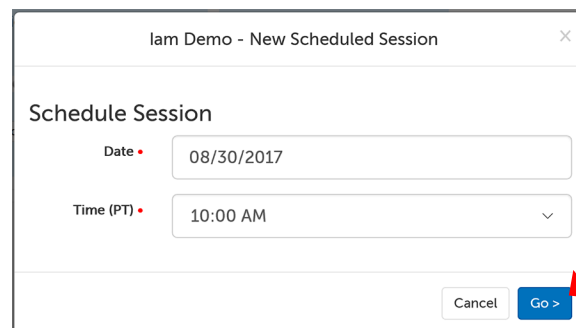
1. Click on the **Videoconference** tab to access your Dashboard. There are two primary scheduling options:
 - **New Session Now:**
Schedule a new session for right now.
(It will pre-populate the date and time.)
 - **New Scheduled Session:**
Schedule a new session for a future time.
(You choose the date and time.)



2. If scheduling a New Session Now, skip to Step 3.
If scheduling a New Scheduled Session, you will select a date (LEFT) and time (RIGHT):



3. Then click **Go >**.



■ 4a. Add participant details:

Participant Name or Initials: Enter the invitee's name (2 characters minimum). Saved contacts will appear in the autofill.

Sessions Invite and Reminders: Select email or text message and a field will appear for you to enter those details. Or choose not to send a session invite or reminders.

Participant Time Zone: Select the participant's time zone.

This screenshot shows a form titled "Add Participant to Session 256128". It includes a text field for "Participant Name or Initials" with the value "Romeo". Under "Session Invite and Reminders", the "System should e-mail invite" option is selected, with a corresponding text field for "Participant E-Mail Address" containing "lothario@montague.net". There are also radio button options for "System should text message invite" and "System should not send invite". A "Participant Time Zone" dropdown menu is set to "Pacific Time". A link "Click here to require Payment" is visible below the time zone field. At the bottom right are "Cancel" and "Save" buttons.

■ 4b. If session payments are set up on your account, and you will require payment for this session, click on the link **Click here to require payment** and additional fields will appear below the time zone field:

Service: Select the applicable Account Service from the drop-down.

Payment Required (\$): Enter the amount the client will be required to pay in order to attend the session.

This screenshot shows the payment section of the form. It includes a "Participant Time Zone" dropdown set to "Pacific Time", a "Service" dropdown set to "Sample Service", and a "Payment Required (\$)" text field with the value "50.00". "Cancel" and "Save" buttons are at the bottom right.

■ 5. Click on **Add Participant** if you would like to invite additional participants and have a group session. Each participant will have a 9-digit access code generated for them, which will appear underneath their name.

This screenshot shows the session details page for "Wednesday, 8/30/2017" at "10:00am (PT)" for "Session #256128". On the left, there are buttons for "Enter Meeting", "Manage", and "Add to Calendar". The main area displays details for participant "Romeo" with phone number "388-409-450", status "NOT IN WAITING ROOM", and "No RSVP Yet". Below this are buttons for "Edit", "Remove", "Remind", and "History", along with a "\$50.00 PAYMENT DUE" indicator. On the right, there is a blue box with a person icon and an "Add Participant" button, which is highlighted by a red arrow.


How your invitees will enter your waiting room

Invitees can enter sessions by clicking on a link in their session invitation e-mail, invitation text, or by using a session Access Code that you provide them with.

a. If Using a Session Invitation

- 1a. The session invitation an invitee receives includes the time and date of the session, their session Access Code, and a **Join Session** button or link.
- 2a. Your invitee RSVPs with **Yes** or **No**.

The invitee also receives a reminder e-mail/text 2 hours before the session, and 10 minutes before the session. They will both have the **Join Session** button or link, which will direct your invitee to your waiting room page (Step 3).

 **SecureVideo Support** 4:06 PM (0 minutes ago) ☆ ↶ ↷

to testing ▾

Demo Account Session Invite

Dear Romeo,

Iam Demo has invited you to a Videoconference Session hosted by Demo Account.

WHEN:
Wednesday, August 30, 2017 at 10:00 AM (Pacific Time)

WILL YOU ATTEND?

TO JOIN:
To join the Session, just click here:

Join Session

You can also join the Session by going to demo.securevideo.com, clicking "Videoconference" and entering **388-409-450**. You can read more on how to join a Session by [clicking here](#).

QUESTIONS?
If you have any questions about this Session, or have any problem when you try to join, please contact **Iam Demo** at [570-777-7777](tel:570-777-7777).

TECHNICAL SUPPORT
If you need technical assistance, please call **Technical Support** at [\(888\) 540-2829](tel:888-540-2829). Or, you can send an e-mail to support@securevideo.com.

Demo Account Session with Iam Demo - Wed, 8/30 at 10:00 AM (PT)
- TO JOIN CLICK <https://demo.securevideo.com/Pass/Join/388409450> - (RSVP reply Y or N)

SecureVideo - Session - Iam Demo
SecureVideo Videoconferencing

Y

You have Confirmed your Session with Iam Demo for Wed, 8/30 at 10:00 AM (PT). Thank you.

b. If Using the Access Code

- 1b. Your invitee can go to the SecureVideo website (www.securevideo.com), and click the **Join a Session** button in the upper right-hand corner.



- 2b. On the next page, they can enter their 9-digit session Access Code (using hyphens or spaces are optional). Then they click **Go**.

A screenshot of the 'Join a Session' page. At the top, the title 'Join a Session' is displayed. Below it is a form with a label 'Access Code' and a text input field containing the placeholder text '9 Digit Access Code'. At the bottom of the form is a blue button labeled 'Go >'.

a. If No Payment is Required

- 3a. When your participant clicks on **Yes** to confirm their attendance, they will be directed to the waiting room page where they can test their connection. Clicking on the **Join Session** button or link in their invite will also direct them to this page, where they will use the **Enter Waiting Room** button at the time of the session.

A screenshot of the 'Session - Iam Demo' waiting room page. The title 'Session - Iam Demo' is at the top in blue. Below it, session details are listed: a calendar icon followed by 'Wednesday, 8/30/2017', a clock icon followed by '10:00am (PT)', and a phone icon followed by the number '570-777-7777'. There is an 'Add to Calendar' button with a dropdown arrow. To the right, there is an envelope icon with a document inside, and below it, the text 'Your RSVP: Yes, will attend' in green. At the bottom right, there is a large blue button labeled 'Enter Waiting Room'. A red arrow points from the left towards this button.

b. If Payment is Required

- 3b. Your participant will click on the **Pay** button to proceed.

Session - Iam Demo

Wednesday,
8/30/2017

10:00am (PT)

[570-777-7777](tel:570-777-7777)

Add to Calendar ▾

Your RSVP: Yes, will attend

\$50.00 PAYMENT DUE

Pay Now

- 4. Your participant will fill out their information accordingly, and click a button to confirm the charge that will be made to the card.

If you entered an email address for the participant, it will auto-populate in the email receipt field.

If you did not send the participant an email invite, they can still enter their own address for a receipt. The receipt lists your business name (as inputted in your Stripe account) and the amount, but no further description of services.

A payment of \$50.00 is required in order to connect to your session.
Please enter your credit card information below.

Cardholder Name •
Card Number (no dashes) •
Credit Card Expiration (Month) •
Credit Card Expiration (Year) •
Credit Card CVV Code •
Billing Address Zip Code •
E-Mail Receipt To

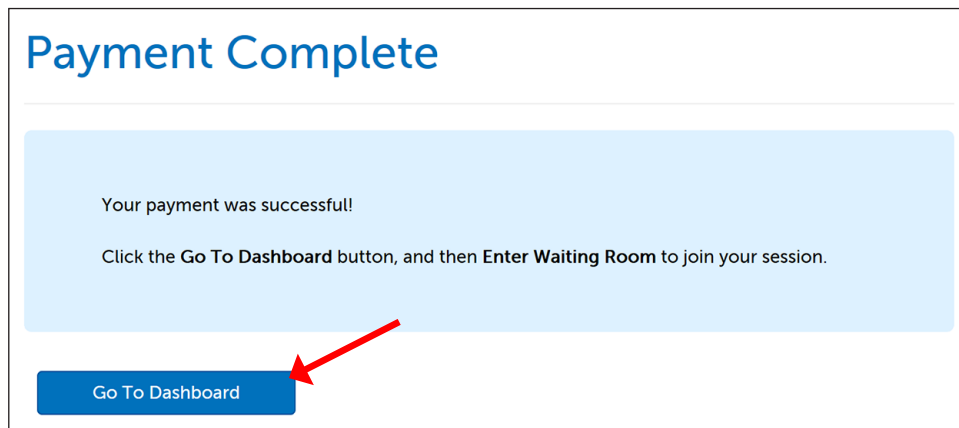
Cardholder Name
Credit Card Number
▼
▼
CVV Code
ZIP Code
lothario@montague.net

Charge Card \$50.00 Now

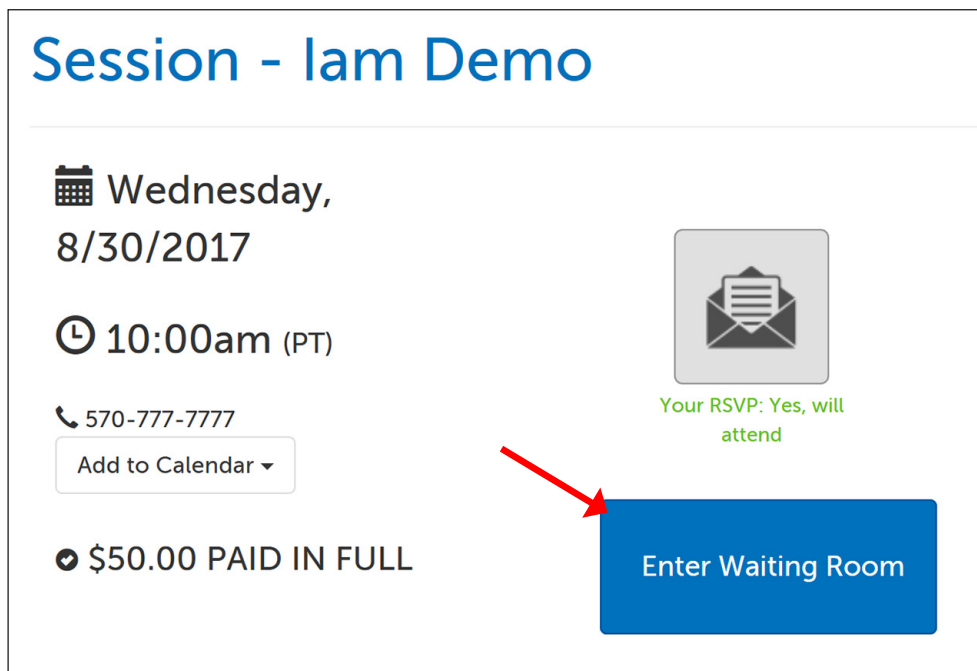
PAGE 6

B. Hosting a Session: How your invitees will enter your waiting room

- 5. If the charge is successful, your participant will see a confirmation page, and click on the **Go To Dashboard** button to proceed.



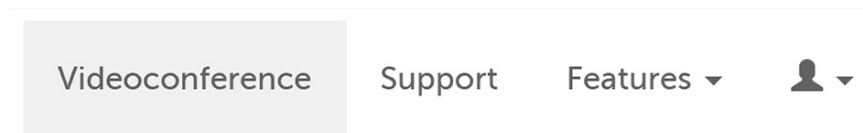
- 6. Back on the waiting room page, your participant will click the **Enter Waiting Room** button to launch the video app and wait for you to start the meeting.



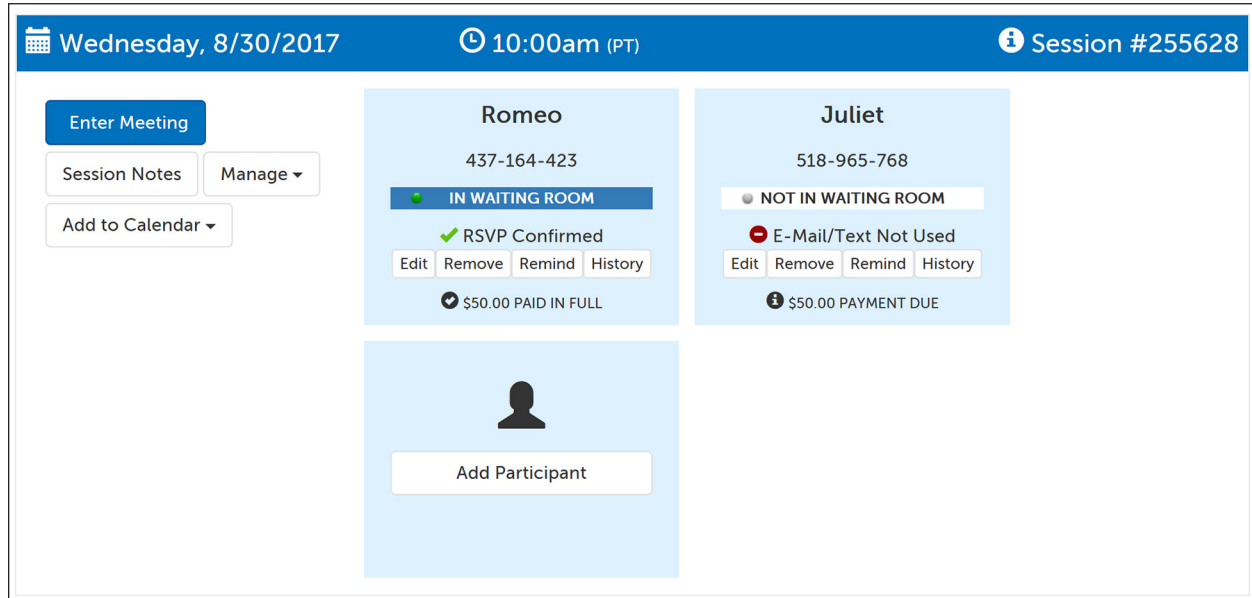
Starting a session

As the host, you must initiate the session by connecting to participants that are in your virtual waiting room.

1. Click on the **Videoconference** tab to access your Dashboard. (This is the page you land on by default after logging in.



2. Your invitees can have two different statuses, as illustrated by this example:
 - **Status is white and reads: Not in Waiting Room**
Romeo is not yet in the waiting room, or you have started the meeting and may be in session.
 - **Status is blue and reads: In Waiting Room**
Romeo has clicked to join.

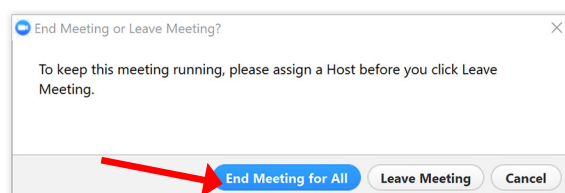
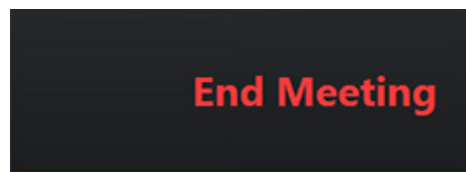


3. When your participant is in the waiting room and you are ready to start the video conference, click on the **Enter Meeting** button, and it will launch Zoom and make their video tile appear.

Ending a session

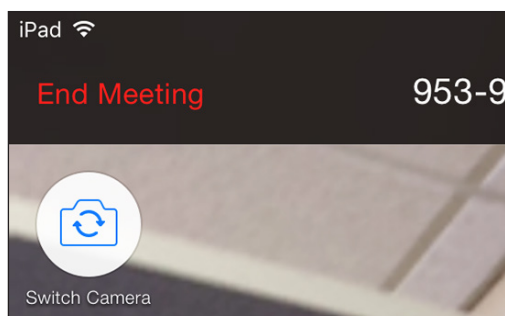
If using a computer:

1. Click anywhere on your video window, and an **End Meeting** button should appear in the lower right hand corner.
2. On the message that appears, click **End Meeting for All** to end the meeting and close the program for everyone.

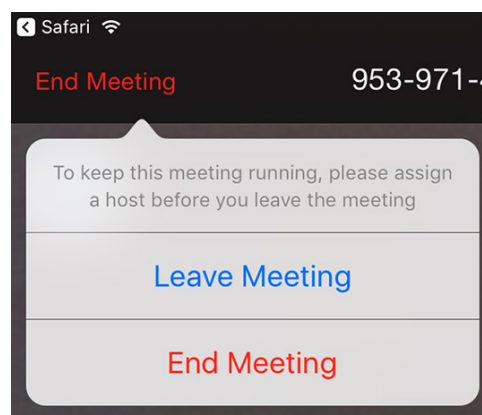


If using a tablet (e.g. an iPad):

1. Tap anywhere, and click on the red **End Meeting** button that appears in the upper left-hand corner of the screen.



2. Click **End Meeting** to end the meeting for everyone.



If using an Android phone or iPhone:

1. Tap anywhere, and click on the red **End** button in the upper right-hand corner of the screen.



2. Click **End Meeting** to end the meeting for everyone.

