# Getting Started Guide

SecureVideo with Zoom

A. Setting Up
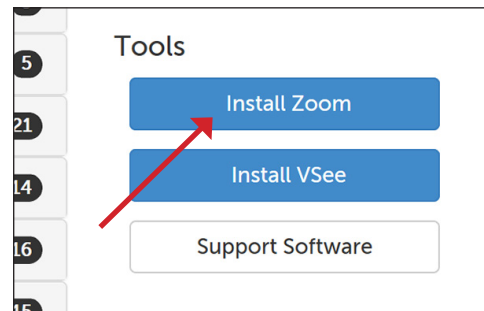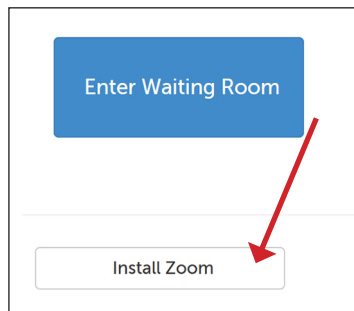
Download our videoconferencing app

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).
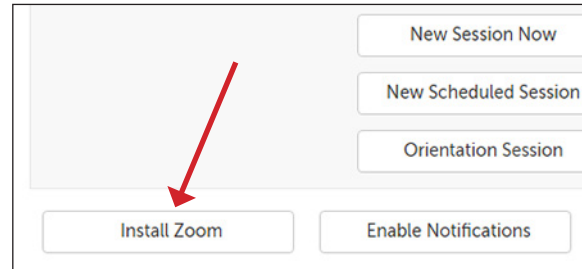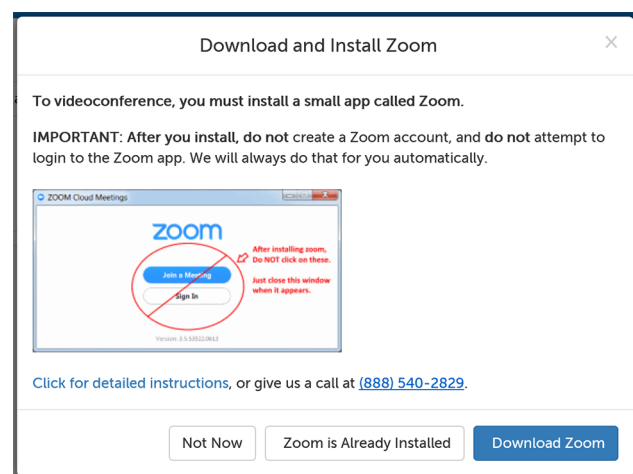
Session participants can find the **Install Zoom** button in two places: the lower left-hand corner of the waiting room page (image below, left) or the lower right-hand corner of the Support page (image below, right).

New Session Now

New Scheduled Session

Orientation Session

Install Zoom   Enable Notifications

Enter Waiting Room

Install Zoom

Tools

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Install Zoom

Install VSee

Support Software

■ 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.)


Download and Install Zoom   ×

To videoconference, you must install a small app called Zoom.

IMPORTANT: After you install, **do not** create a Zoom account, and **do not** attempt to login to the Zoom app. We will always do that for you automatically.

Click for detailed instructions, or give us a call at (888) 540-2829.

Not Now   Zoom is Already Installed   Download Zoom

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.)
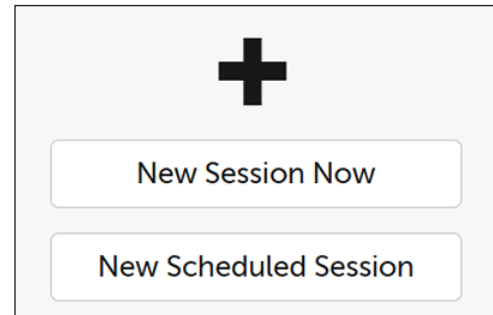
■ 2. If scheduling a New Session Now, skip to Step 3.
   If scheduling a New Scheduled Session, you will select a date (LEFT) and time (RIGHT):
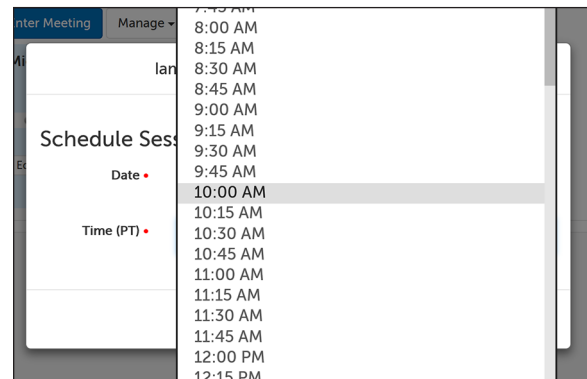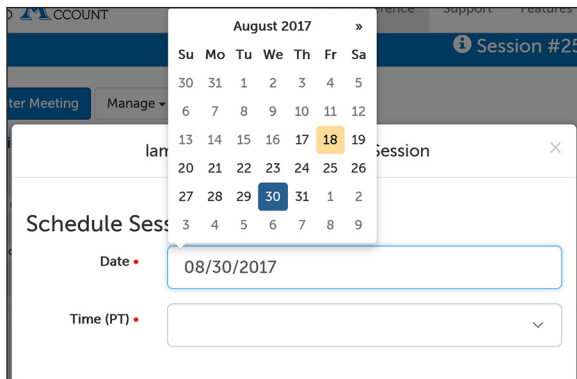
■ 3. Then click **Go >**.
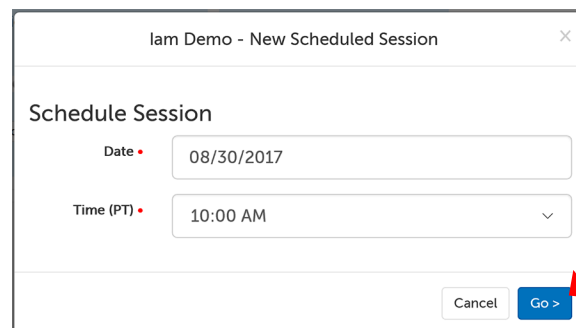
■ 4a. Add participant details:

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.

■ 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.

■ 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.

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).

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. 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.

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

Add to Calendar ▾

ℹ️ $50.00 PAYMENT DUE

Your RSVP: Yes, will attend

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 •	Cardholder Name
Card Number (no dashes) •	Credit Card Number
Credit Card Expiration (Month) •	⌄
Credit Card Expiration (Year) •	⌄
Credit Card CVV Code •	CVV Code
Billing Address Zip Code •	ZIP Code
E-Mail Receipt To	lothario@montague.net

Charge Card $50.00 Now

5. If the charge is successful, your participant will see a confirmation page, and click on the **Go To Dashboard** button to proceed.
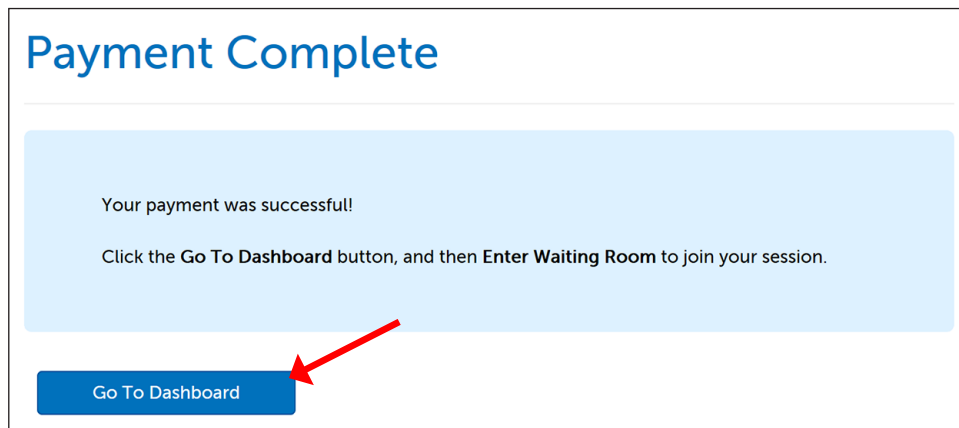
6. Back on the waiting room page, your participant will click the **Enter Waiting Room** button to launch the video app and wait for you to start the meeting.
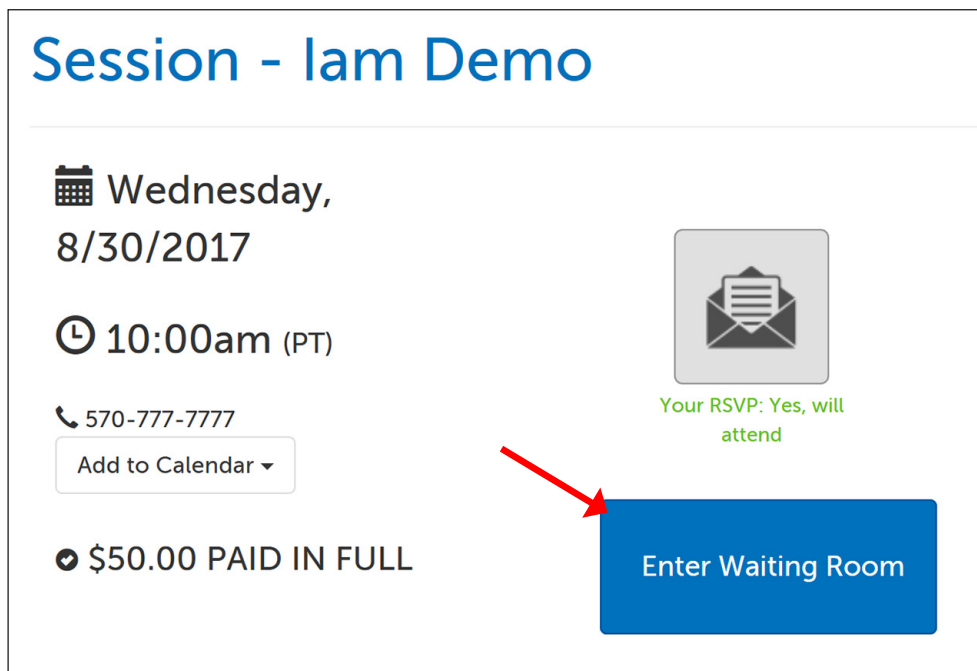
Starting a session

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

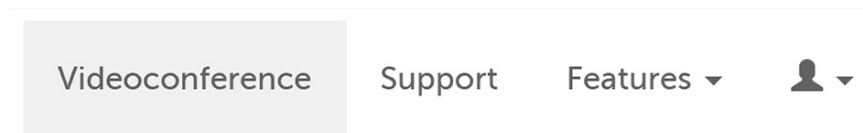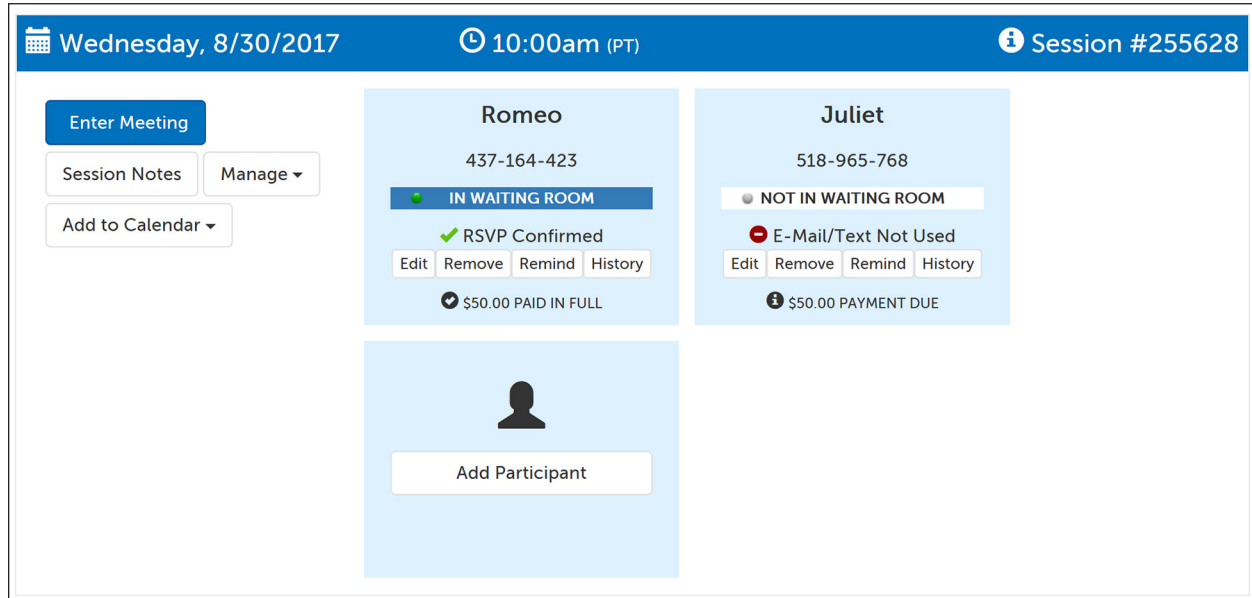■ 1. Click on the **Videoconference** tab to access your Dashboard. (This is the page you land on by default after logging in.

| Videoconference | Support | Features ▾ | 👤 ▾ |

■ 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.

📅 **Wednesday, 8/30/2017**　　🕙 **10:00am** (PT)　　ⓘ **Session #255628**

|	Romeo	Juliet
Enter Meeting	437-164-423	518-965-768
Session Notes　Manage ▾	● IN WAITING ROOM	◌ NOT IN WAITING ROOM
Add to Calendar ▾	✔ RSVP Confirmed	⛔ E-Mail/Text Not Used
	Edit Remove Remind History	Edit Remove Remind History
	✔ $50.00 PAID IN FULL	ⓘ $50.00 PAYMENT DUE

👤

Add Participant

■ 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.
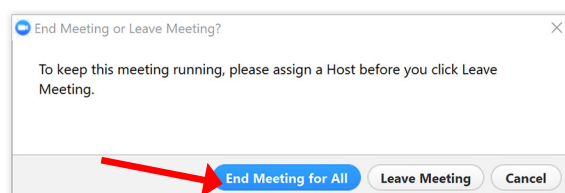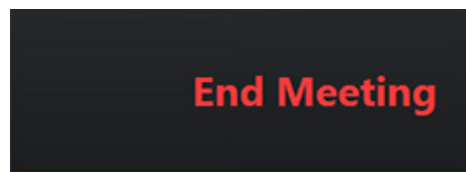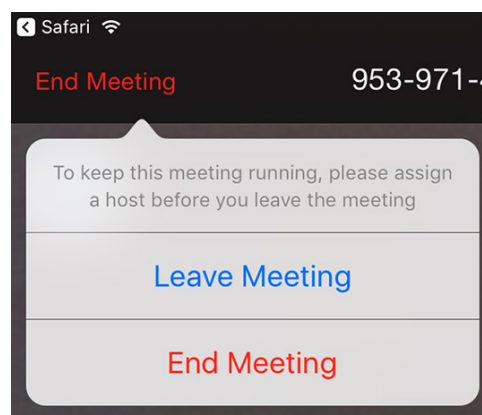

If using a tablet (e.g. an iPad):

1. Tap anywhere, and click on the red **End Meeting** button that appears in the upper left-hand corner of the screen.
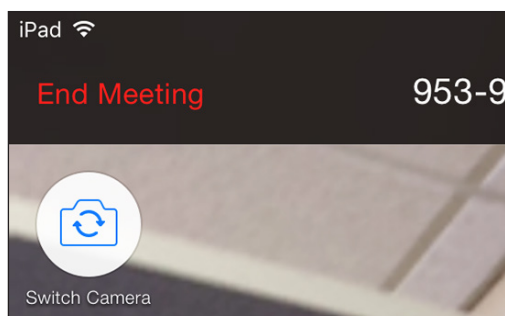
2. Click **End Meeting** to end the meeting for everyone.

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.