



IT technicians · Zoho One optimization



Zoho Meeting

User and Administrator Manual

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Zoom meeting: <https://nuagix.zohobookings.com/#!/andre-martin>

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1. Introduction and access

1.1 About this manual

This manual describes the Zoho Meeting features available to users and the functions reserved for administrators, as available in September 2026.

Zoho Meeting has two components: meetings (Meeting) and webinars (Webinar). Available features vary by edition and by your organization's configuration.

1.2 What is Zoho Meeting?

Zoho Meeting is Zoho's video conferencing and webinar solution. It lets you hold audio and video meetings in the browser or the app, share your screen, record sessions, get AI-generated transcripts and summaries, and run webinars with registration, polls and Q&A. It integrates with calendars and other Zoho apps, including Zoho CRM.

1.3 Signing in

1. Go to <https://meeting.zoho.com> (or <https://meeting.zohocloud.ca> if your organization is hosted in the Canadian data center).
2. Sign in with your Zoho account or your organization's single sign-on.
3. If you use Zoho One, open the app launcher and select Meeting.
4. Complete multi-factor authentication with Zoho OneAuth if required.

Nuagix tip — Install the Zoho Meeting desktop app and the mobile app: they deliver better audio and video quality than the browser on weaker connections.

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2. Interface and navigation

2.1 Interface elements

Element	Purpose
Dashboard	Upcoming meetings and webinars, Start and Schedule buttons
Meetings	List of scheduled, past and recurring meetings
Webinars	Creating and managing webinars, registrations and reports
Recordings	Session recordings, transcripts and summaries
Personal Meeting Room	Permanent room reachable through a unique link
Reports	Attendance, duration, engagement and usage statistics
Settings	Personal preferences; organization settings for administrators

2.2 Accessing sessions

- Web browser: no download required for participants
- Desktop app (Windows, macOS) to host and join
- iOS and Android mobile apps
- Phone dial-in (local or toll-free access numbers, depending on edition)
- Equipped conference rooms with Zoho Meeting Rooms

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3. Scheduling a meeting and inviting

3.1 Starting or scheduling a meeting

1. From the dashboard, click Meet Now for an instant meeting, or Schedule.
2. Enter the topic, date, time, duration and time zone (e.g., America/Toronto for Quebec).
3. Indicate whether the meeting is recurring (daily, weekly, monthly).
4. Add participants by email address, internal or external.
5. Choose options: meeting password, lobby, co-hosts, automatic recording.
6. Click Schedule: participants receive an invitation with the link, meeting ID and password.

3.2 Invitations and reminders

- Email invitation with a calendar file (.ics) and join link
- Participant responses (RSVP) visible on the meeting details
- Automatic reminders before the session
- Copy the invitation link to share it by chat or in an email
- Add an agenda and attachments to the invitation

3.3 Roles during a meeting

Role	Powers
Host	Starts the meeting, controls participants, recording and settings
Co-host	Helps manage participants, the lobby and sharing
Presenter	Can share their screen or an application
Participant	Sees, hears, chats and speaks according to granted permissions

Nuagix tip — Always name a co-host for customer meetings: if your connection weakens, the meeting stays under control.

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4. Joining and hosting a meeting

4.1 Joining a meeting

1. Click the link you received or go to the Join page and enter the meeting ID.
2. Enter your name and, if needed, the password.
3. Test your microphone, camera and speakers on the preview screen.
4. Choose computer or phone audio, then click Join.

4.2 Lobby

When the lobby is enabled, participants wait until the host or a co-host admits them. The host can admit one person, admit everyone or deny access. The meeting can also be locked once all participants are present.

4.3 Host controls

- Mute a participant or everyone (Mute all)
- Ask a participant to turn on their camera or stop their video
- Promote a participant to co-host or presenter
- Remove a participant from the meeting
- Lock meeting to prevent any new entry
- Disable participant chat or screen sharing

4.4 Audio and video

- Virtual backgrounds and background blur
- Background noise suppression
- Gallery view or active speaker view
- Pin a participant's video

Caution — Before an important meeting, run an audio and video test and close bandwidth-heavy applications (file sync, video streaming).

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5. Screen sharing and collaboration

5.1 Sharing your screen

1. Click Share in the control bar.
2. Choose the entire screen, an application window or a browser tab.
3. Check computer audio sharing if you are presenting a video.
4. Click Stop Sharing to finish.

5.2 Collaboration tools

Tool	Use
Whiteboard	Draw, annotate and brainstorm together live
Annotation	Highlight and annotate shared content
Remote control	Give or request control of the shared screen, depending on edition
Chat	Public or private messages during the session
Breakout rooms	Split participants into small groups, then bring them back to the main room
Reactions and raised hand	React without interrupting and ask to speak

5.3 Raised hands

A participant clicks Raise Hand to ask to speak. The host sees the list of raised hands in the participants panel, in order, and can allow the person to speak then lower their hand.

Nuagix tip — For meetings with more than ten people, ask participants to raise their hand rather than unmute: discussions stay clear and the recording is easier to follow.

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6. Polls, Q&A and engagement

6.1 Creating a poll

1. In the meeting or webinar, open the Polls tab.
2. Click Create Poll and enter the question.
3. Choose the type: single choice or multiple choice; add the possible answers.
4. Launch the poll at the right moment; participants answer live.
5. Show or hide the results to participants, then review them in the session report.

Nuagix tip — Prepare your polls in advance in the scheduled webinar: you will only need to launch them during the presentation.

6.2 Questions and answers (Q&A)

- Participants submit written questions in the Q&A panel
- The organizer or panelists answer live, aloud or in writing
- Private or public answer depending on the question
- Anonymous questions allowed or not, depending on settings
- All questions are kept in the session report

6.3 Measuring engagement

- Poll participation rate
- Number of questions asked and answered
- Attendance duration of each participant
- Attention indicators, depending on edition

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7. Recording, transcription and summaries

7.1 Recording a session

1. During the session, click Record; an indicator notifies participants.
2. Pause or stop recording as needed.
3. After the session, the recording is processed and then available in the Recordings tab.
4. Play, download or share the recording by link, with or without access restrictions.

Caution — Always inform participants before recording and obtain their agreement, especially with external people. The recording contains personal information (face, voice, name).

7.2 AI transcription and summaries

Feature	Description
Transcript	Time-stamped, searchable and exportable text of the session
Summary	Overview of the discussion generated automatically from the recording
Keynotes	Key points and decisions extracted by Zia
Chapters	Recording split by topic for quick navigation
Highlights	Short clips of important moments

Note — AI features must be enabled by the administrator and depend on the edition and the session language. Always review a summary before sending it to a customer.

7.3 Recording best practices

- Name the recording clearly (customer, topic, date)
- Share a restricted-access link rather than a downloaded file
- Delete recordings that are no longer needed
- Add the summary to the customer record in Zoho CRM

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8. Webinars

8.1 Creating a webinar

1. Webinars tab > Schedule Webinar.
2. Enter the title, description, date, time, duration and language.
3. Choose the type: live, recurring or On-Demand webinar.
4. Invite Panelists, who will be able to speak and share their screen.
5. Customize the registration form and registration page with your branding.
6. Publish the registration link on your website, in your emails and on your social networks.

8.2 Participant registration

- Customizable registration form: standard fields and custom questions
- Automatic or manual approval of registrations
- Customizable confirmation, reminder and follow-up emails
- Registrant and attendee limits depending on edition
- Consent to marketing communications collected in the form
- Tracking of registration sources (website, email, social networks)

Nuagix tip — Add an explicit consent checkbox for receiving your communications to the registration form: you can then import registrants into Zoho Campaigns while complying with CASL and Quebec Law 25.

8.3 Running a webinar

Feature	Use
Practice session	Rehearse with panelists before opening to attendees
Polls and Q&A	Engage the audience without unmuting microphones
Public chat	Exchanges between the organizer and attendees
Allow to talk	Let an attendee who raised their hand speak
Live streaming	Stream to YouTube, Facebook, LinkedIn or a custom platform
Documents and links	Share a presentation or a call-to-action link

8.4 After the webinar

- Report of registrants, attendees and absentees
- Automatic follow-up email with the recording link
- Publishing the recording as an on-demand webinar
- Exporting attendees to Zoho CRM or Zoho Campaigns

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9. Calendars and user integrations

9.1 Syncing your calendar

1. Settings > Integrations > Calendar.
2. Connect Zoho Calendar, Google Calendar or Microsoft Outlook / Microsoft 365.
3. Scheduled meetings are added automatically to your calendar.
4. Install the Google Calendar or Outlook add-on to add a Zoho Meeting link in one click.

9.2 Zoho CRM and other apps

- Zoho CRM: schedule a meeting from a record, with automatic activity logging
- Zoho Bookings: automatically add a meeting link to booked appointments
- Zoho Cliq: start a meeting from a conversation
- Zoho Mail and Zoho Calendar: schedule from an email or event
- Zoho Backstage and Zoho Campaigns: events and marketing invitations
- Browser extension to start or schedule quickly

Nuagix tip — Schedule customer meetings from Zoho CRM: the meeting, participants and summary stay attached to the customer record.

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10. Reports

10.1 Available reports

Report	Content
Meeting report	Participants, join and leave times, duration
Registration report	Registrants, sources and form answers
Attendance report	Attendees, absentees and webinar attendance duration
Polls and Q&A	Poll answers and questions asked
Usage (administrator)	Number of sessions, minutes, active users

10.2 Viewing and exporting

1. Reports tab or the past session's details.
2. Choose the meeting or webinar and the period.
3. Filter by the report you need (attendance, polls, Q&A).
4. Export to CSV or XLSX for your analyses.

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11. Mobile and desktop apps

11.1 Mobile features

- Start, schedule and join meetings
- Attend webinars, polls and Q&A
- Share the device screen
- Switch between Wi-Fi and cellular without leaving the session
- Receive meeting reminders

11.2 Desktop app

- Better audio and video quality
- Advanced screen sharing and remote control
- Quick start from the taskbar
- Notifications of upcoming meetings

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12. Best practices

12.1 Nuagix recommendations

- Enable the lobby and a password for every meeting with external people
- Send an agenda with the invitation and start on time
- Use a headset with a microphone for better audio quality
- Name a co-host to manage the lobby and chat
- Announce the recording at the start of the session and keep it only as long as needed
- Review Zia's summary and send follow-ups within 24 hours
- For Quebec customers, write invitations and registration pages in French

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13. Users, roles and departments

13.1 Roles

Role	Controls
Super Admin	Full access to the organization's features, settings and data
Admin	Manages users, settings and reports; cannot modify the Super Admin
Member	Hosts and joins according to settings; sees their own recordings and reports
Department Admin	Manages users and meetings in their department
Department Member	Takes part in their department's activities

13.2 Adding a user

1. Settings > Administration > Users > Add User.
2. Enter the email address and choose the role.
3. Assign them to the appropriate department.
4. Assign a meeting license, a webinar license or both, depending on the subscription.
5. The user receives an invitation and uses a license once active.

Note — In Zoho One, first add the user in the Zoho One console and assign them the Meeting app.

13.3 When an employee leaves

1. Transfer their scheduled meetings and webinars to another host.
2. Retrieve or transfer the recordings to keep.
3. Update the meeting rooms and integrations that use them.
4. Deactivate or remove the user to free the license.

Caution — Deleting a user without transferring their sessions can cancel scheduled webinars and make their recordings inaccessible.

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14. Organization settings

14.1 General settings

- Organization name, logo and default time zone
- Interface and email language
- Default meeting and webinar settings applied to everyone
- Locking certain settings so users cannot change them
- Departments to organize users and delegate management

14.2 Branding

1. Settings > Branding.
2. Add your logo and colours to registration pages and emails.
3. Set up a custom domain or subdomain, depending on edition.
4. Customize the invitation, reminder and follow-up email templates.

Nuagix tip — Prepare bilingual email templates (French first, then English) for webinars aimed at audiences both in and outside Quebec.

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15. Meeting security settings

15.1 Security options

Setting	Effect
Meeting password	Require a password to join
Lobby	Have participants admitted by the host
Organization-only meetings	Limit access to authenticated users from the domain
Meeting lock	Prevent new entries once the session has started
Screen sharing	Restrict sharing to the host or open it to everyone
Chat and file transfer	Limit or disable depending on the session type
Recording	Allow, restrict or force recording; notice to participants

15.2 Applying the settings

1. Settings > Meeting or Webinar > Security.
2. Enable the default options for the organization.
3. Lock essential options (lobby, password) so they apply to everyone.
4. Inform users of the new rules.

Nuagix tip — Make the lobby and password mandatory for external meetings: it is the best protection against intrusions.

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16. Meeting rooms

16.1 Zoho Meeting Rooms

Zoho Meeting Rooms turns a conference room into a video conferencing room: a screen, a camera, a microphone and a controller let you start or join a meeting in one click, without a laptop.

16.2 Setting up a room

1. Settings > Meeting Rooms > Add Room.
2. Name the room and specify its location (e.g., Quebec City office, room A).
3. Pair the room device using the pairing code shown on screen.
4. Link the room calendar to display booked meetings.
5. Test audio, video and screen sharing.

16.3 Personal rooms

- Each user can have a personal room with a permanent link
- Handy for recurring meetings with the same people
- Protect it with a lobby and a password
- Administrators can enable or disable this option

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17. Recording storage

17.1 Managing recordings

- Cloud storage for recordings depending on edition
- Tracking of storage used per user
- Download and sharing permissions for recordings
- Automatic deletion of recordings after a set period, if the option is available
- Transfer of recordings to Zoho WorkDrive for archiving

17.2 Retention policy

1. Set the retention period for recordings based on their use (training, customer, internal).
2. Configure automatic deletion or schedule regular clean-ups.
3. Restrict downloads to roles that truly need them.
4. Document the policy and communicate it to users.

Caution — A deleted recording generally cannot be recovered. Archive recordings you need to keep before enabling automatic deletion.

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18. Integrations

18.1 Zoho integrations

Application	Typical use
Zoho CRM	Schedule from records, log meetings and webinar registrants
Zoho Campaigns / Marketing Automation	Invite lists and follow up with attendees
Zoho Bookings	Automatic meeting link for appointments
Zoho Cliq	Start a meeting from a conversation
Zoho Calendar / Mail	Schedule from an event or email
Zoho Backstage	Virtual and hybrid events
Zoho WorkDrive	Archive recordings
Zoho Analytics	Advanced engagement analysis

18.2 Other integrations

- Google Calendar and Microsoft Outlook / Microsoft 365
- Live streaming to YouTube, Facebook and LinkedIn
- Zapier to connect other apps
- Website integration through a registration link or button
- REST API (OAuth 2.0) and webhooks
- MCP server to connect AI assistants to Zoho Meeting

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19. Security and compliance

19.1 Security controls

- Multi-factor authentication and single sign-on (SAML) via Zoho Accounts / Zoho Directory
- Encryption of communications in transit (TLS/SRTP) and of data at rest
- Action log: history of administrator and user activities
- Anonymization of participants' personal data
- Restricting meetings to authenticated users
- Hosting in the Canadian data center (zohocloud.ca)

19.2 Privacy and Quebec Law 25

- Inform participants of recording and transcription, and of their purpose
- Collect consent in the webinar registration form
- Limit the information requested at registration to what is strictly needed
- Set a retention period for recordings and registrant lists
- Handle access, correction and deletion requests
- Assess enabling AI features based on the sensitivity of discussions

Note — This manual is not legal advice. Confirm your obligations with your legal advisor.

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20. Editions and licenses

20.1 Editions

Plan	For whom
Free	Trials and short, small meetings
Meeting Standard / Professional	Teams: meetings, recording, breakout rooms, depending on edition
Webinar Standard / Professional / Enterprise	Webinar organizers: registration, streaming, higher capacity
Zoho Meeting Rooms	Equipped conference rooms
Zoho One / Workplace	Meeting included with the suite's other apps

Note — The number of participants, session duration and storage vary by edition. See Zoho's pricing page for current limits.

20.2 Tracking usage

Settings > Subscription shows the edition, the number of host licenses used, session capacity and recording storage. Remove licenses from users who no longer host sessions.

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21. Deployment checklist

21.1 Before going live

- ☐ Organization, logo, time zone and language configured
- ☐ Users added, roles and departments assigned
- ☐ Meeting and webinar licenses assigned
- ☐ Lobby and password enabled by default
- ☐ Recording, transcription and AI settings defined
- ☐ Recording retention policy documented
- ☐ Zoho, Google or Microsoft 365 calendars connected
- ☐ Integrations (CRM, Bookings, Campaigns, Cliq) configured
- ☐ Email templates and registration pages customized in French
- ☐ Meeting rooms set up and tested
- ☐ Consent and privacy (Law 25) built into forms
- ☐ Users trained and documentation delivered

Nuagix tip — Nuagix can support your team with Zoho Meeting setup, integration and training.
Book a Zoom meeting: <https://nuagix.zohobookings.com/#!/andre-martin>

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Appendix

A. English-French glossary

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A. English-French glossary

A.1 Interface terms

English (interface)	French
Meeting	Réunion
Webinar	Webinaire
Schedule	Planifier
Meet Now	Démarrer maintenant
Join	Rejoindre
Host	Animateur
Co-host	Coanimateur
Panelist	Panéliste
Participant	Participant
Lobby	Salle d'attente
Screen sharing	Partage d'écran
Whiteboard	Tableau blanc
Breakout room	Salle de sous-groupe
Raise Hand	Lever la main
Poll	Sondage
Q&A	Questions-réponses
Recording	Enregistrement
Transcript	Transcription
Registration	Inscription
Action log	Journal des actions

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