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# Account Roles

- Owner:
  - There is only one Account Owner.
  - The Owner has Admin and Host capabilities.
  - The Owner is responsible for billing duties.
  - The Owner can set the Company Name and Street Address that appear in Email Invitations.
  - On Enterprise accounts, the Owner has access to the white label settings.
- Admin:
  - Admins have all Host capabilities.
  - Admins are able to join, edit, and delete other hosts' and admins' meetings and recordings.
- Host:
  - Hosts can create and join video conferences and webinars.
  - In Pro and Enterprise accounts, hosts can record their meetings.
  - Hosts have their own Account Dashboard and calendar; they do not see other hosts' meetings or recordings.

\_\_\_\_\_

### Login to Your Account

- Owner
- Admin
- ✓ Host
  - Navigate to your account in your browser (e.g., "app.website.com").
  - Enter your User Name and Password and click Login.
  - If needed, you can reset your password by clicking the **Forgot Password** link.

	Login
	Enter your Email Address and Password.
$\leq$	david.smith@company123.com
p	•••••
orgo	ot Password? Click Here
orgo	ot Password? Click Here
ave	ot Password? Click Here e read and agree to the Privacy Policy and End User
ave	ot Password? Click Here e read and agree to the Privacy Policy and End User se Agreement.
nave cen	ot Password? Click Here e read and agree to the Privacy Policy and End User se Agreement.
orgo have icen	ot Password? Click Here e read and agree to the Privacy Policy and End User se Agreement. Login
have icen	ot Password? Click Here e read and agree to the Privacy Policy and End User se Agreement. Login
have icen	ot Password? Click Here e read and agree to the Privacy Policy and End User se Agreement. Login emember Me

- When successfully logged in, you will see your Account Dashboard.
  - Hosts do not have access to the Billing and Users buttons.
  - Admins do not have access to the Billing button.
  - The API is only available on Enterprise accounts.



### Users

- Owner
- Admin
- Host

The Users section allows you to manage Host and Admin users of your account.

- Add: add a new Host and/or Admin user to the account.
  - Requires an available host license.
  - Additional host licenses can be added to your subscription from the Billing section.
  - Send the newly added login the activation email so they can set up their password.
- Edit: edit the selected user.
- **Delete:** delete the selected user.
  - Deleting a user deletes all associated data including meetings, recordings, API keys, and usage history.
  - Deleted users and their data are **not** recoverable.

Search			c
Full Name	Email	Roles	Active
Debra Morello	debra.morello@company123.com	Owner Admin Host	$\checkmark$
Paula Erikson	paula.erikson@company123.com	Admin Host	
Jefferey Melokis	jefferey.melokis@company123.com	Host	$\checkmark$

Add User	×	
Email Address *		
suneil.prakash@company123.com		
Roles		
Host ×	•	
Full Name		
Suneil Prakash		
Activation *		
Send user activation email		
Close	✓ Add	

### **Billing**

- Owner
- 🗸 Admin
- Host

The Billing section allows you to view your current plan and make changes to your plan and billing preferences.

- Edit Plan: Change your plan, billing frequency, number of host licenses, or cancel the subscription.
- Edit Payment Method: Update the credit card on file for future payments.
- Past Invoices: View PDFs of your previous payments.

Plan: Enterprise Next Renewal Date 05/22/2021 Billing: Annually \$79.00 Per Host   Per Month 10 Hosts	Payment Method Card Number 4444
Total Billed Annually: \$9,480.00 Edit Plan	Edit Payment Method
Past Invoices	

- **Plan:** Change plans (Starter, Pro, Enterprise).
- **Billing:** Change billing frequency between Monthly or Annually.
- Hosts: Increase or decrease the number of host licenses.
  - You can only remove host licenses that are not in use by an active user.
  - If you delete an active user, you will be able to remove the host license that was occupied by that user.
  - All accounts require a minimum of one (1) license to remain active.
- **Cancel:** Cancel your subscription immediately, and retain access to the end of the current billing cycle.

Change Plan	/ Billing	Cancel Account If you would like to cancel your account
Plan	Enterprise +	access to your account until the end your current billing period. At that ti your account will be deactivated and associated data will be deleted
Billing	Annually	Cancel Subscription
Hosts	- 10 +	
Coupon	Enter coupon Apply	
Total	\$9480.00 Annually (10 Host x \$79.00 Per Month)	
	Update Plan / Billing	

		03 04	
	Confirm Cancel Account?	Weekly Sales Meeting	
	We're sorry to see you go. Before completing your cancelation, please let us why you are canceling and if there is anything we can do to		
06	improve.	10 11	
	Reason for Canceling *	Aneeki Ashina Meehuni	
13	For security purposes, please enter the email address associated with	17 18	
	the owner of this account.	Weekly Sales Meeting	
	Email		
	Enter Email		
	I understand that any files, recordings and other data associated with this		
20	account will be deleted once this account is canceled.	24 25 Washing Salas Meeting	
	Close		
27	28 29 30	31 01	

• Add/Edit Payment Method: Update the credit card on file for future payments.

Recontings		-				
Files.		Add you	r preferred payment meth	od.		
	06	Name On Card			11 les Meeting	
		Name On Card				
		Card Number *	Expiry *	cvc*		
		1234 1234 1234 1234	MM / YY	CVC		
	13				18 les Meeting	
			DADOY	20		
	20	U Churk	Security		25	
		Cancel		U	Ies Meetings	

### API

- Owner
- Admin
- Host

The API section allows you to generate API tokens for use with integrations.

- **API Playground:** Discover and test the available schema and API calls.
- **API Endpoint:** The endpoint for your account for all API requests.
- **API Token:** Use the token to authenticate API requests.
  - Generate: Create a new token.
  - **Revoke:** Delete the existing token (cannot be undone).

<b>\PI</b>	×
API Playground The GraphQL playground is built in to this application for learning and Please refer to this for documentation:	d testing the available API schema.
https://m4demo.videoconferencinginfo.com/playground	
Note: When acccesing the playground, input your apiToken as follows	s to load the schema:
QUERY VARIABLES HTTP HEADERS (1)	
<pre>1 {"apiToken":"KC8KNNMA0xRQUDDYTLOG3VPSAKXEK7MT"</pre>	2
API Endpoint	
All API requests should be made with this URL: https://m4demo.videoconferencinginfo.com/api	
API Token	
No Active Token	
Generate Revoke	
Close	

# **Meetings**

- Owner
- Admin
- ✓ Host

The Meetings section allows you to view a list of your scheduled meetings.

- **Create:** Create a new meeting.
- Invite: Open the Invitations window for the selected meeting.
- Join: Join the selected meeting now.
- Edit: Change/Update the selected meeting.
- **Delete:** Delete the selected meeting.

Search			
Meeting ID	Meeting Name	Scheduled	Current Users
4554357	Product Launch Presentation	Tue Dec 15 2020 2:30 PM (CST/UTC-06:00)	0
1462987	Weekly Sales Meeting	Thu Dec 03 2020 2:00 PM (CST/UTC-06:00)	0
3850537	Special	Wed Nov 25 2020 6:00 PM (CST/UTC-06:00)	0
1702724	IT Presentation: Updates & Features	Tue Feb 02 2021 10:30 AM (CST/UTC-06:00)	0
4109706	October Webinar	Fri Oct 23 2020 11:00 AM (CDT/UTC-05:00)	0

### Create Meeting:

#### Details:

- Meeting Name: Title of your meeting that is displayed on your calendar and Email Invitations.
- Start Date / Time: When your meeting will start.
- End Date / Time:
  - Meetings that reach their end time are locked and cannot be joined unless a Repeat cycle is also set for the meeting.
    - Meetings with a Repeat cycle remain active until manually deleted or they are unused for 6 months.
  - An inactive meeting can be reactivated by editing the start and end date and time.
- Time Zone: Choose the Time Zone for your meeting.
- **Repeat:** Choose how often your meetings will repeat.
  - Every Day
  - Every Week

### Every Month

i cate M	eeting								
Details	Settings	Attendees	Summar	γ					
Meeting O	wner 🚯								
Jeffere	Melokis								-
Meeting N	ame 🕕 📩								
Jeff's D	aily Brief								
Start Date	/ Time								
Decem	per 7, 2020 9:	00 AM							
End Date /	Time 🚯								
Decem	per 7, 2020 5:	00 PM							
Time Zone	0								
CST/UT	C-06:00								
Repeat									
Every D	ay								-
								_	-

• **Meeting Owner:** The Owner and Admins can create meetings for different users on the account.

Details	Settings	Attendees	Summary					
Meeting	wner							
Debra	Morello							-
<b>Debra</b> debra.r	<b>Morello</b> norello@compa	ny123.com						
Paula E	rikson rikson@compa	123 com						
Jeffere	Melokis	100						
Supell	melokis@com	pany 123.com						
suneil.	rakash@compa rakash@compa	iny123.com						
Decem	ber 4, 2020 2:	DO AM						
Time Zon	0							
CST/U	rc-06:00							-
Repeat <b>(</b>								

• Click the **Next** button to go to the Settings tab.

#### Settings:

- Meeting Types:
  - Video Conference standard:
    - Video conference for up to 20 users.
    - The meeting link is public and can be shared.
    - All users have access to audio and video streaming.
  - Video Conference secure:
    - Standard video conference with secure access enabled.
    - o Users must be added to the Attendees tab during meeting creation.
    - Each user will receive a unique link and key for accessing the meeting.
    - Each user can be configured with specific permissions.
  - Webinar open:

0

- Webinar configured for up to 200 attendees.
  - The Host and Moderators are able to stream audio and video.
    - Users added to the Attendees tab with the Moderator permission have Host capabilities.
- $\circ$   $\;$  An open webinar has a single link to share with all guests.
- Webinar with registration:
  - Webinar configured for up to 200 attendees.
  - $\circ$   $\;$  The Host and Moderators are able to stream audio and video.

- Users added to the Attendees tab with the Moderator permission have Host capabilities.
- o Guests must register prior to receiving their link to join the webinar.
  - Each guest receives a unique link after registering to your webinar.
- Classroom:
  - Special video conference configuration that allows the Instructor (Host) to see all students (Guests) video streams.
  - Students only see the Instructor and do not see the other students' video streams.

Create Meeting					×	Agenda
Details Settings Attendees	Summary					05
Select a meeting type:						
Video Conference standard	Video Conference secure access only	Webinar open		Webinar w/ registration		12
Classroom restricted streaming						rlef
<ul> <li>Advanced Settings</li> </ul>						
						19 hef:
						94
						kief.
						02 Her
Close		<	Previous	Next >	✓ Create	

#### **Advanced Settings:**

- Meeting Chat:
  - **Open:** Public and Private chat is available to all users.
  - **Restricted:** Chat is limited to Host-to-Guest and Guest-to-Host.
- Meeting User List:
  - **Open:** Names of all participants are visible in the user list.
  - Restricted:
    - Hosts can see the full list of participants (Guests and other Hosts) in the user list.
    - Guests can only see the Host(s) names in the user list.
  - Hide Automatically: User list hides after a few seconds upon joining the meeting.
- Meeting Security:
  - Open:
    - Anyone can join the meeting using the Meeting ID or link.

- Meeting is capped at 20 users unless Disable Video and Disable Audio are both checked under Guest Restrictions.
- Secured:
  - $\circ$   $\;$  Each user requires their own access Key to join the meeting.
  - $\circ$   $\;$  Add users in the Attendees tab during meeting creation.
- Registration:
  - Used for collecting webinar guest names and email addresses.
  - o Guests must register in order to receive a link to join your webinar.
  - Hosts, presenters, and chat moderators should be added in the Attendees tab.

#### Waiting Room:

- Before joining your video conference or webinar, your guests will be placed in the Waiting Room.
- A Host must manually allow guests to join the meeting.

#### • Default Behavior:

#### Notes:

- The Default Behaviors apply to all users who join with ability/permission to stream audio and video.
- In Video Conferences, it is common to start with Camera and Microphone on by default.
- In Webinars, it is common to start with Camera and Microphone for the Host(s) off by default.
- Turn Microphone on Automatically:
  - Users will join the meeting with their microphones turned on.
- Turn Camera on Automatically:
  - Users will join the meeting with their webcams turned on.
- Tile Layout:
  - All video images are the same size and change size depending on how many total participants are connected to your meeting.

#### Speaker Layout:

- One large video image appears in the center of the screen.
- The large video image changes depending on who is speaking.

#### Large Meeting:

 $\circ$  ~ Use this setting for meetings that will have 8 or more camera images.

#### • Guest Restrictions:

- Notes:
  - Restrictions apply to all guests who join an open meeting using the Meeting ID.
  - o Guests who join with a Key will override the Guest Restrictions.
  - For webinars, it is common to disable most Guest Restrictions and invite additional speakers, presenters, and chat moderators from the Attendees tab.
  - Disable Video, Disable Audio, and Disable Screen Sharing are required for a webinar.
- Restrict Guest-to-Guest Streaming:
  - Special video conference configuration that allows the Instructor (Host) to see all students (Guests) video streams.
  - Students only see the Instructor and do not see the other students' video streams.
- Disable Video: Prevents Guests from turning on their webcams.
- Disable Audio: Prevents Guests from turning on their microphones.
- Disable Screen Sharing: Prevents Guests from using the screen share feature.

- Disable Web Video Player: Prevents Guests from using the Web Video Player.
- Disable Chat: Prevents all chat for guests, including Guest-to-Host chat.
- Disable File Upload: Prevents guest from uploading files to the meeting.
- Disable File Download: Prevents guest from downloading files to the meeting.

Create Meeting						×	at
▼ Advanced Settings							
Meeting Chat 0							
Open      Restricted							
Meeting User List 🕕							
Open O Restricted							
Hide Automatically							rief
Meeting Security ()							
Open O Secured Registration							
Waiting Room							
Default Behavior 🕕							
<ul> <li>Turn Microphone On Automatically</li> </ul>							trint .
<ul> <li>Turn Camera On Automatically</li> </ul>							
Tile Layout     Speaker Layout							
Large Meeting							
Guest Restrictions ()							
Restrict Guest-to-Guest Streaming							
Disable Video							
Disable Audio							anter-
Disable Screen Sharing							
Disable Web Video Player							
Disable Chat							
Disable File Upload							
Disable File Download							
	-				_		Trief
Close	<	Previous	Next	>	✓ Cre	eate	

• Click the **Next** button to go to the Attendees tab.

#### Attendees:

- Notes:
  - Each user added to Attendees receives a unique link with a Key for meeting access.
  - Attendees must be added for Secure Meetings.
  - For Webinars, add additional speakers, presenters, and moderators to Attendees.
  - For Webinars, it is recommended to leave Disable File Download unchecked. This will allow guests to download any Meeting Files, like handouts or forms.
- Click the Add Guest button to add an Attendee.
  - Click the Add Host button to add an additional speaker or presenter.

- Users added with this button get the **Moderator** permission by default.
- The Moderator Permission should only be given to Attendees to use Host features:
  - o Start Recording
  - $\circ \quad \text{Kick Users} \quad$
- Type a user's Name and Email Address.
- Select the user's Permissions:

Details Settings	Attendees Summary		
Open Meeting This meeting is configure additional attendees usi who join via the Open lin	ed as Open, which means any guest can jo ng the fields below to give specific users a k. Hosts can be given the Moderator peri	in using the same link and Meeting ID (provided aft ccess keys with permissions (e.g. Webcam, Microph mission.	er you finish creating the meeting). You can optionally add one, etc.) that may otherwise be withheld from the guests
pecial Attendees			
Add From Contacts			
	Name	Email Address	Permission
+ Add Host +	Add Guest		
			Webcam X Microphone X
•	Richard Williams	richard.williams@company987	Screen Sharing 🕷 Chat 🕷
			Upload Files X Video Player X
			Webcam X Microphone X -
•	Maria Harp	maria harn@company987.com	Screen Sharing 🗶 Chat 🗶
	- Thank that p	hana peconpany or com	Upload Files X Download Files X
			Video Player 🗶 Moderator 🗶

- Click the **Next** button to go to the Summary page or...
- Click **Create** to finish setting up your meeting.

Attendee         Link         Copp           Richard Williams (richard.williams@company987.com)         https://m4demo.videoconferencinginfo.com/meeting/?key=psliea839839         Image: Company 2012 Company	eff's Daily Brief		
Attendee       Link       Copy         Richard Williams (richard.williams@company987.com)       https://m4demo.videoconferencinginfo.com/meeting/?key=psliea839839       Image: Company 2010 and 2010		special Attendees	
Richard Williams (richard.williams@company987.com) https://m4demo.videoconferencinginfo.com/meeting/?key=psliea839839 [	Attendee	Link	Сору
	Richard Williams (richard.williams@company987.com)	https://m4demo.videoconferencinginfo.com/meeting/?key=psliea839839	
Maria Harp (maria.harp@company987.com) https://m4demo.videoconferencinginfo.com/meeting/?key=bjrawh184962	Maria Harp (maria.harp@company987.com)	https://m4demo.videoconferencinginfo.com/meeting/?key=bjrawh184962	

- Click the Invite button to send Invitations to your Video Conference or Webinar.
  - Jump to <u>Invitations</u>.
- Click Join to Join your meeting now. Enter your name on the next screen.
  - Jump to Join Meeting.

### **Edit Meeting:**

The Edit Meeting feature allows you to makes changes to an existing meeting. You can change the Meeting Name, Date/Time, Advanced Settings, and the list of Attendees.

• Details:

Edit Meet	ing									×	
Details	Settings A	ttendees	Summa	ary							
Meeting Na	me 0 📩										
Jeff's Da	ily Brief										
Start Date	Time										
Decemb	er 7, 2020 9:00 A	M									riet
End Date /	Fime										
Decemb	er 7, 2020 5:00 P	M									
Time Zone	0										
CST/UT	2-06:00									•	rief
Repeat 0											
Every D	ау									-	
											tries
Class							1	Paratana	 		

#### • Settings:

dit Meetin	g									3	\$ 10
Details	Settings	Attendees	Summary	r							
Meeting Chat	6 Restricted										
Meeting User	List <b>(</b>										
Open	Restricted										
Hide Auton	natically										
Meeting Secur	rity										
Open	Secured	Registration									
Waiting Ro	om										
Default Behav	ior 🚯										
Turn Micro	phone On Au	utomatically									r.
Turn Camer	ra On Autom	atically									
O Tile Layout	<ul> <li>Speak</li> </ul>	er Layout									
Large Meet	ing										
Guest Restrict	ions										
Restrict Gu	est-to-Gues	t Streaming									
Disable Vid	eo										
Disable Aud	dio										
Disable Scr	een Sharing										
Disable Me	dia Player										
Disable Cha	at										
Disable File	Upload										
Disable File	Download										
								1000			-
Close						<	Previous	Next	>	✓ Update	

#### • Attendees:

Details Settings Attend	ees Summary					
Secured Meeting This meeting is configured as Secu attendee will receive a key with pe	rred, which means access to this ermissions (e.g. Webcam, Micro	s meeting is restricted to s phone, etc.) that can be cu	pecified attendees. Add any/all attendees to the stonized per attendee. Hosts can be given the	nis meeting using the fiel Moderator permission.	ds belov	v. Each
pecial Attendees						
	Name	Email Address	Permission	Кеу	Sent	Received
+ Add Host + Add Gue	est					
			Webcam X Microphone X	•		
			Screen Sharing 🕷 Chat 🕷			
•	Richard William	richard.williams@	Upload Files 🗶	psliea839839		
			Download Files 🔀			
			Video Player 🗶			
			Webcam × Microphone ×	•		
			Screen Sharing × Chat ×			
•	Maria Harp	maria.harp@com	Upload Files 🗶	bjrawh184962		
			Download Files 🔀			
			Video Player X Moderator X			

• Click **Update** to confirm your changes.

	Special Attendees	
Attendee	Link	Сору
Richard Williams (richard.williams@company987.com	n) https://m4demo.videoconferencinginfo.com/meeting/?key=psliea839839	
Maria Harp (maria.harp@company987.com)	https://m4demo.videoconferencinginfo.com/meeting/?key=bjrawh184962	

### Join Meeting:

The Join Meeting feature allows you to instantly connect to the live meeting room from here with Host privileges.

- Click on a meeting from the calendar or Meeting's list.
- Then click **Join**.

06	Jeff's Daily Brief × 11 12 Secure Meeting
	■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■
	<b>茵 Start:</b> Mon Dec 07 2020 9:00 AM (CST/UTC-06:00) <b>茴 End:</b> Mon Dec 07 2020 5:00 PM (CST/UTC-06:00)
13 Jeff's Daily Brief	Call In:     US +1 (206) 928-9280     In:     12       Conference ID: 2235346     Edit 1     Conference ID: 22560
	Guest Link: Guest links are unique for this meeting. Click Edit to view Attendee information.
20 Defits Daily Brief	Invite A Join V Edit & Delete O 25 26
	Weekly Saler Meeting

• Enter your name and click **Go**.

		, W	reekly Sales Meeting		
		Fature and the disclosed in the second			
		Enter your name to be displayed in the meeting.			
		Jefferey Melokis			
	13 Data pair part				
	They around ever	Connect			
		Cancel	GO		

• Allow the camera and microphone access to your web browser.

••• *** VCI • * +		
← → C (a) m4demo.videoconferencinginfo.com/meeting/?id=2235346		💌 🕒 Guest
videoconferencinginfo.com wants to Use your microphone Block Allow		
Video / Audio Options	eferred video and audio devices	
	Camera	Microphone
	Speakers	Phone  Call In := US +1 (206) 928-9280 Call In := US +1 (206) 928-9280
	Test Speakers:	International Numbers
		Join Now

- Preview and select the correct hardware.
- Click Join Now to load the meeting.





### **Delete Meeting:**

The Delete Meeting feature allows you to end a particular meeting and prevent further access.

- Once deleted, the meeting and all associated access keys and links are erased and cannot be recovered.
- Once deleted, the meeting's name can be reused for another meeting.
- **Note:** It is highly recommended that you delete meetings that are no longer in use to prevent unintended usage on your account.
- Select a meeting from the calendar or Meeting's list and click **Delete**.

Filme		
List. Rissorts	06	Meeting with Tamika and Charlie
		■ Meeting ID: 8521151
100		🔁 Start: Fri Dec 18 2020 2:30 PM (CST/UTC-06:00)
Settings		🛱 End: Fri Dec 18 2020 10:30 PM (CST/UTC-06:00)
	13	18 19
	Jeff's Daily Brief	Call In: US+1 (206) 928-9280
		Conference ID: 8521151
		P Host Pin: 4563
		Guest Link: https://m4demo.videoconferencinginfo.com/meeting/?id=8521151
	20	
	Jeff's Daily Brief	
		Weekly Sales Meeting

• Click End on the next screen to confirm deletion.

Liti Risports 2<br API	Jeff's Daily, Brief	Confirm End Meeting?	×	Jeff's Daily Brief	
Setting	Jeff's Dally Brief	Are you sure you want to end meeting: Meeting with Tamika and Charlie? Please confirm.	1	17 18 Jeff's Daily Brief Meeting with Tamika an	
		Close	✓ End		

### Invitations

- Owner
- 🗸 Admin
- Host

Send your participants an email invitation or a text with your meeting link.

- **Open Meetings:** Email or text your meeting link to your participants.
- Secure Meetings: Email each user their own unique link.
- **Open Webinars:** Email or text your webinar link to your participants.
- Webinars with Registration: Email or text the registration link to your participants.
- **Open Meetings with Special Attendees & Webinars with Special Attendees:** Email or text your open link to your participants. Email secure links to the Special Attendees.
- Click on Invitations from the panel on the left of your Account Dashboard.
- Select a meeting from the drop-down menu.
- If you have just finished creating a meeting, then it will already be selected in the drop-down menu.

		×	
Meeting			
Weekly Sales Meeting		*	
IT Presentation: Updates &	Features		
Weekly Sales Meeting			
Product Launch Presentatio	n		
Jeff's Daily Brief			
Add recipient from cont	acts		
		_	
	Meeting Name:		
	Meeting Name: Weekly Sales Meeting		
	Meeting Name: Weekly Sales Meeting Date / Time:		
	Meeting Name: Weekly Sales Meeting Date / Time: Thu Dec 03 2020 2:00 PM (CST/UTC-06:00)		
	Meeting Name: Weekly Sales Meeting Date / Time: Thu Dec 03 2020 2:00 PM (CST/UTC-06:00) Conference Call:		

- **Open Meetings:** Send either email invitations or text your meeting link.
  - Enter email addresses of your participants.
    - Separate email addresses with a comma.
  - Click Send.

Invitations		×	Agenda
Meeting			ағ. О
Weekly Sales	Meeting	•	
SMS 😐			
🖌 Email 🛛	salesreps@company123.com, salesreps@gmail.com		trief :
Add recipier	it from contacts		
Valid emails:	salesreps@company123.com, salesreps@gmail.com		
			trief
			rief -
	Meeting Name: Weekly Sales Meeting		
	Date / Time:		
Close		Sond	irief.

- **SMS:** Send a text to your participant.
  - Texts can only be sent one to Open Meetings.
  - Texts can only be sent to one participant at a time.
  - Enter the cell phone number of your participant and click **Send**.

Invitations		×	Agenda
Meeting Weekly Sales	Meeting	•	at
<ul> <li>SMS</li> <li>Email</li> <li>Add recipier</li> </ul>	9175541213 pete @genalizeon; phili@genali.com; etc: tfrom contacts		Net
			Het
	Meeting Name: Weekly Sales Meeting Date / Time: Thu Dec 03 2020 2:00 PM (CST/UTC-06:00) Conference Call:		rief
Close		✓ Send	rlef

- Secure Meetings: Attendees receive the invitation with their access key.
  - You'll see the list of users who have been added to your meeting listed in the Invitations window.
  - Remove users if necessary.
  - Click Send.



- Webinars with Registration: Send your webinar audience a link to the Registration page.
  - Enter their email addresses and click Send.
  - Separate email addresses with a comma.



# **Recordings**

- Owner
- Admin
- Host

The Recordings section shows you a list of previously recorded Meetings and Webinars.

- Click on **Recordings** on the left side of your Account Dashboard.
  - The **Owner** and **Admins** on the account have access to all recordings.
  - Hosts have access only to their own recordings.

Files :	Recording List			×	09 Irlef
Reports	Search			٩	
API	Meeting Name	Date/Time	Participants	Size	16
Settionus	Weekly Sales Meeting	Wed Oct 14 2020 04:09:04 PM		1 MB	iriat 👘
	Weekly Sales Meeting	Tue Dec 01 2020 12:44:00 PM		1 MB	
	Jeff's Daily Brief	Thu Dec 31 2020 02:46:31 PM		23 MB	23
	Jeff's Daily Brief	Fri Jan 22 2021 11:23:59 AM			triet
	Close		Request Download	/ Playback Delete	

- Select a recording from the list:
  - Request Download/Playback: Click Request to retrieve your recording.
    - This step is required before accessing any recordings.
    - Check back after a few minutes to see the process of your request.
    - Once the recording has been processed, additional buttons to download and play your recording will appear.

Recording List			×
Search			٩
Meeting Name	Date/Time	Participants	Size
Weekly Sales Meeting	Wed Oct 14 2020 04:09:04 PM		1 MB
Weekly Sales Meeting	Tue Dec 01 2020 12:44:00 PM		1 MB
Jeff's Daily Brief	Thu Dec 31 2020 02:46:31 PM		23 MB
Jeff's Daily Brief	Fri Jan 22 2021 11:23:59 AM		

- **Play:** Opens the recording in your web browser so that you can view it immediately.
- **Download:** Download an MP4 file of your recording to your computer.
- **Copy:** Copy either the Download or Playback Links to share with other people.
- **Delete:** Delete the recording (cannot be undone).

Meeting Name         Date/Time         Participants         Size           Weekly Sales Meeting         Wed Oct 14 2020 04:09:04 PM         1MB           Weekly Sales Meeting         Tue Dec 01 2020 12:44:00 PM         1MB	
Weekly Sales Meeting     Wed Oct 14 2020 04:09:04 PM     1 MB       Weekly Sales Meeting     Tue Dec 01 2020 12:44:00 PM     1 MB	
Weekly Sales Meeting Tue Dec 01 2020 12:44:00 PM 1MB	
Jeff's Daily Brief Thu Dec 31 2020 02:46:31 PM 23 MB	
Jeff's Daily Brief Fri Jan 22 2021 11:23:59 AM 31 MB	
Close Play Download Copy - D	Delete

## **Reports**

- Owner
- Admin
- Host

The Reports section allows you retrieve account data.

- Click on the Reports icon on the panel in your Account Dashboard.
- Usage Report: Find out historical data about meetings. You'll be able to see who joined meetings, what times they joined and left, and information about their connection.
- Invitation History: Find out the status of your Email Invitations.

Available Re	eports	×
Select report you	wish to run:	
Last	Usage Report	
Las	Invitation History	
Close		Proceed >

### Usage Report:

- Filter by Date Range: Select from presets like "this week" and "last week" or select a custom date range.
- Filter by Login: Owners and Admins will be able to filter results by particular logins on the account.
- Filter by Status: Filter between active and inactive meetings. If you're unsure, select Both.
- Select Meeting(s): Choose one or a several meetings from the list to narrow your search.
  - Select all meetings: Check to see data for all meetings on your account.
- Run Report: Click the Show Meeting Usage button to see your results.

• • • #3 VCI × +	
← → C      m4demo.videoconferencinginfo.com/reports/	Guest :
Back  Meeting Usage Report	
Filter by Date Range:     Standard     Or     Custom       Start     10/01/2020     End Date     12/31/2020	
Filter By Login     Debra Morello       Filter by Status:     Active       Inactive     Both	
Select Meeting(s): 💽 Select all meetings All Meetings Selected	×
Run Report: Show Meeting Usage	

• When you have your results, you can either export to CSV or PDF files.

- > C 🕯	m4demo.videoconferencin	ginfo.com/reports/						Guest
< Back	Meeting Usage Repo	ort						
ilter by Date Rang	ge: Standard or Custor	n						
tart Date 10/0:	1/2020	End 12/31/2020 Date						
ilter by Status:	Active Inactive	Both						
elect Meeting(s):	<ul> <li>Select all meetings</li> </ul>							
								*
un Report	show Meeting Usage	where To CSV Export P	DE					
tun Report.	silow Meeting Osage	Export IO CSV						
1462987 - We	eekly Sales Meeting - Fri Dec 11	2020 12:04 PM - 12:23:48 PM						
User Name	Join Time	Exit Time	Duration	Browser	IP	OS		
User Name David Smith	Join Time Fri Dec 11 2020 12:04 PM	Exit Time Fri Dec 11 2020 12:23 PM	Duration 00h:19m:11s	Browser Chrome/87.0.4280.88	IP 73.74.90.85	os os x		
User Name David Smith 2099265 - We	Join Time Fri Dec 11 2020 12:04 PM Rekly Sales Meeting - Tue Dec 0	Exit Time Fri Dec 11 2020 12:23 PM 1 2020 12:43 PM - 2:00:51 PM	Duration 00h:19m:11s	Browser Chrome/87.0.4280.88	IP 73.74.90.85	os os x	I	
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User Name David Smith 2099265 - We User Name David Smith Isabella Heal David Smith Isabella Heal David Smith	Join Time         Fri Dec 11 2020 12:04 PM         Betky Sales Meeting - Tue Dec 01         Join Time         Tue Dec 01 2020 12:43 PM         Tue Dec 01 2020 12:43 PM         Betky Sales Meeting - Weet Now         Join Time         Betky Sales Meeting - Weet Now         Weet Nov 25 2020 7:48 PM         Weed Nov 25 2020 9:50 PM         Weed Nov 25 2020 9:50 PM	Exit Time           Fri Dec 11 2020 12:23 PM           1 2020 12:43 PM - 2:00:51 PM           Exit Time           Tue Dec 01 2020 2:01 PM           Tue Dec 01 2020 2:00 PM           25 2020 7:48 PM - Thu Nov 26 22           Exit Time           Wed Nov 25 2020 9:49 PM           Wed Nov 25 2020 10:25 PM	Duration           00h:19m:11s           01h:19m:01s           01h:18m:01s           01h:17m:08s           01h:17m:08s           02h:01m:21s           02h:01m:21s           02h:51m:38s           02h:51m:38s           00h:35m:17s	Browser Chrome/87.0.4280.88 Chrome/87.0.4280.67 Chrome/87.0.4280.67 Chrome/87.0.4280.67 Chrome/87.0.4280.67 Chrome/87.0.4280.67 Chrome/87.0.4280.67 Chrome/87.0.4280.67	IP 73.74.90.85 70.74.90.85 73.74.90.85 73.74.90.85 73.74.90.85 73.74.90.85	05 05X 05 05X 05X 05X 05X 05X		

### **Invitation History**:

- Filter by Date Range: Select from presets like "this week" and "last week" or select a custom date range.
- Filter by Delivery Status: Choose between Delivered Invitations and Bounced and Pending Invitations. Select Both to combine your results
- Run Report: Click the Show Invitations History button to see your results.

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K Back En	nail Invitation History				
Filter by Date Range: Show invitation history fr Filter by Delivery Status: Run Report: Show Inv	Standard or Custom om: any time - Both Delivered vitations History	Bounced/I	Pending		
••• May VCI	× +				<b>0</b> · · · ·
← → C a m4demo.video	conferencinginfo.com				Guest :
Filter by Date Range: Standard Start 10/01/2020 Filter by Delivery Status: Both Run Report: Show Invitations H	Custom End Date 01/31/2021 Delivered Bounced/Pending istory				
Email	Sent Date/Time	Result	Meeting ID	Meeting Name	
astaal@attendees.com	Wed Oct 14 2020 21:51:44 +0000	Bounced	4109706	October Webinar	
larusa.jac@attendees.com	Wed Oct 14 2020 21:52:28 +0000	Bounced	4109706	October Webinar	
mikhail.beard@gmail.com	Wed Oct 14 2020 21:54:08 +0000	Delivered	2099265	Weekly Sales Meeting	
kim.fountain@gmail.com	Wed Oct 14 2020 21:54:08 +0000	Delivered	2099265	Weekly Sales Meeting	
mikhail.beard@gmail.com	Fri Nov 20 2020 18:38:37 +0000	Delivered	1702724	IT Presentation: Updates & Features	
emma.spyers@gmail.com	Fri Nov 20 2020 19:40:11 +0000	Delivered	1702724	IT Presentation: Updates & Features	
kim.fountain@gmail.com	Thu Dec 03 2020 23:59:14 +0000	Delivered	1462987	Weekly Sales Meeting	
jay.bright@gmail.com	Fri Jan 22 2021 16:24:25 +0000	Delivered	8471031	Working Remotely: How to Develop and Maintain Client R	Relationships
emma.spyers@gmail.com	Fri Jan 22 2021 16:24:50 +0000	Bounced	8471031	Working Remotely: How to Develop and Maintain Client R	lelationships
nathanael.wu@gmail.com	Fri Jan 22 2021 16:25:59 +0000	Delivered	8471031	Working Remotely: How to Develop and Maintain Client R	lelationships
eliza.ramsay@gmail.com	Fri Jan 22 2021 16:31:17 +0000	Delivered	8471031	Working Remotely: How to Develop and Maintain Client R	lelationships
raj.wilder@gmail.com	Fri Jan 22 2021 16:31:32 +0000	Delivered	8471031	Working Remotely: How to Develop and Maintain Client R	elationships
raj.wilder@wilderaj.com	Fri Jan 22 2021 16:31:59 +0000	Bounced	8471031	Working Remotely: How to Develop and Maintain Client R	lelationships
shawn.simpson@gmail.com	Fri Jan 22 2021 16:32:20 +0000	Bounced	8471031	Working Remotely: How to Develop and Maintain Client F	telationships

### **Files**

- Owner
- Admin
- Host

The Files section allows you upload and manage documents and files for use during meetings and sharing with meeting participants.

- Click on the Files icon on the panel in your Account Dashboard.
- Select a file from the list to:
  - **Delete:** Deletes the file and cannot be undone.
  - Share: Allow specific people to have access to your file or share it with an entire meeting. When shared with a meeting, the file will appear in the Meeting Files list for that meeting and all participants will have access to the file. When shared with a specific user, the file will appear in that user's Your Files > Shared with You folder.
  - **Download:** Download a copy of the file onto your computer.

File Sharing			*
four Files >			
Name	Created Date	Size	Sharing
Sales Charts	2	121	Private
Assembly_Instructions_MK_2020.pdf	Tue Feb 02 2021 05:42:44 PM	76.84 KB	Private
Presentation_for_Updates_and_Features.pptx	Tue Feb 02 2021 05:45:54 PM	33.45 KB	Private
Presentation_for_Updates_and_Features.pdf	Tue Feb 02 2021 05:45:54 PM	1.32 KB	Private
Product_Launch_Video.mov	Tue Feb 02 2021 05:53:55 PM	10.22 MB	Private
	-		

• Click the **Upload** button to start uploading files to your account.

- When Sharing a file, you can choose meetings from the left or individuals on the right.
- Make your selection(s) and click on Update Sharing



# Uploading Files

- How to upload files:
  - You can drag and drop files from your computer onto your browser to get them ready to upload or...
  - Click on the upload icon to browse for files instead.
- Folder Options: Click on Create a New Folder to upload your file(s) to a new folder.
- Click on **Upload Now** to upload your file(s).

Jpload Files Dro		×
Dro	<b>A</b>	
(Max 25	P FIES HERE TO UDIOAD Or click here to browse. files per batch / Max 100 MB per file)	
Name	Status	
December Sales.xlsx	Ready to upload	
January Sales.xlsx	Ready to upload	
Folder Options Create a New Folder Sales Charts Files uploaded in this batch will be added to folder: Sales Charts	s	

### **Settings**

- Owner
- Admin
- Host

The Settings section allows you to change basic account details, login details, or branding settings depending on the user and account type.

- Account Details: Admins and Hosts can adjust their email address, phone number, and full name.
  - Email Address: Used to log into your account.
  - **Phone Number:** Used for internal contact purposes.
  - **Full Name:** Display name that appears in meetings, email invitations, etc.
  - **Meeting Duration:** Set the default duration for a meeting when you create it.

Settings	×	
Account Details		
Email Address		
jeff.melokis@company123.com		
Phone Number		
J 888-555-1212		
Full Name		
Jefferey Melokis		
Change Password		
Meeting Defaults		
Meeting Duration		
8 hours	•	
Close	🗸 Update	
401 02 04	00	

- **Owners** can also add the Company Name and Address.
- Enterprise Accounts have additional branding settings.
  - For a full explanation of each branding option, please use this link <u>Theme, Logo, and</u> <u>Custom Options PDF</u>

Deffs Dally	Settings		× Conty Brief
	Account Details	Theme / Logo	
	Email Address	Theme Color 🚯	
	debra.morello@company123.com	#506799	
	Phone Number	Preview	
	J 888-555-1212	Background Color	
OPEN'S DRINY	Full Name	White	s to any dener
	🚨 Debra Morello	Icon ()	
	Change Password	Change Icon	
	Company Name		
	E Company 123		
Battis Dalk	Street Address		- Daily Brief
	600 Green Street		
	City		
	I New York	Change Logo	
	State/Province	Custom Options	
	围 NY	From Email 0	
	Zip/Postal Code	invite@mycompany.com	Verify
leff's Dally	盟 10005	Exit URL	s Daily Briat
	Country	https://mycompany.com/exit	
	B USA	EULA Text	
		By submitting this form, you agree to the terms	
		EULA Link	
		https://company123.com/eula.html	
plens Daily			a pany the