



ZOOM MADE SIMPLE CLASS TWO
Scheduling a Simple Client Meeting & Sending Invite

Scheduling a Simple Client Meeting in Zoom

Step 1: Open Zoom

- **Open the Zoom app on your computer**
- **Or go to zoom.us and click Sign In**

Step 2: Click “Schedule”

- **On the home screen, click Schedule (calendar icon)**

Step 3: Add Your Meeting Details

Keep it simple—only fill in what you need:

- **Topic: Example – “Buyer Consultation” or “Listing Presentation”**
- **Date & Time: Select when your meeting will start**
- **Duration: Estimate (30–60 minutes is typical)**

Step 4: Keep Basic Settings

- **Leave Video On for Host and Participant (more personal)**
- **Audio: Leave as Computer Audio or BOTH**
- **Make sure the Waiting Room is checked (optional but helpful) If you leave “PASS CODE” then they need that number.**
- **Host/Participant “on off” for video.**
- **Open OPTIONS and click items you want. Can add COHOST there too.**

Step 5: Click “Save”

- **Your meeting is now created**

Sending the Invite to Buyers or Sellers

Option 1: Copy & Paste Invite (Easiest Way)

1. After saving, find the meeting details
2. Click **Copy Invitation**
3. Paste into:
 - Email
 - Text message
 - CRM system

Option 2: Send Through Email (Automatic)

- Click **Email Invitation**
- Choose your email (Gmail, Outlook, etc.)
- It will open a ready-made message—just add your client’s email and send

What to Tell Your Clients (Keep It Simple)

When you send the invite, you can say:

- “Click the link a few minutes before our meeting”
- “Make sure your sound is on”
- “You can join from your phone or computer”

Pro Tip for Realtors

- Schedule the meeting **right after booking the appointment**
- Name it clearly (ex: “123 Main St Listing Appointment”)
- Always **test your link once** before sending if you’re unsure