Clarizen Go App

Overview

With Clarizen Go for Zoom, you will never miss an important project update, even when you're on Zoom! Select your Active Workspace, and Clarizen Go will send you important notifications and help you to always stay on top of things.
The app also makes it easy to initiate a Zoom meeting for those in the Workspace, create new tasks, and more.

Prerequisites

- A free or subscribed Zoom account
- A free trial version or subscribed Clarizen Go account

Installing and Connecting Clarizen Go

1. In the Zoom App Marketplace, search for, and install the Clarizen Go app.
2. After installing the app, you will see Clarizen Go in the Chat section on your Zoom app.
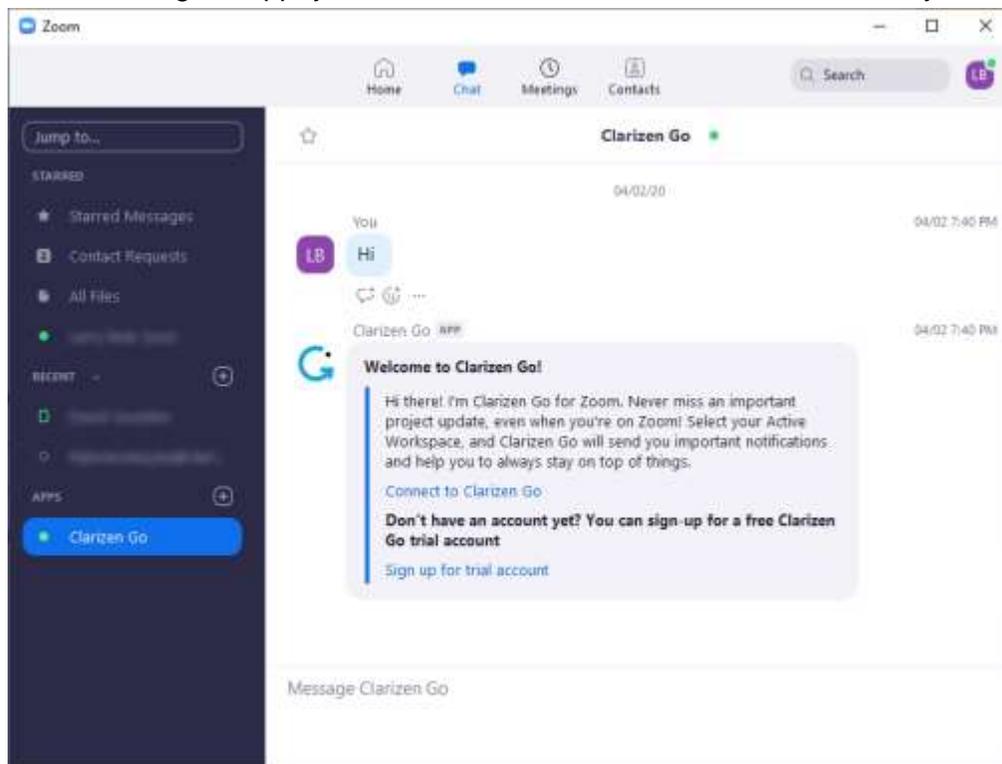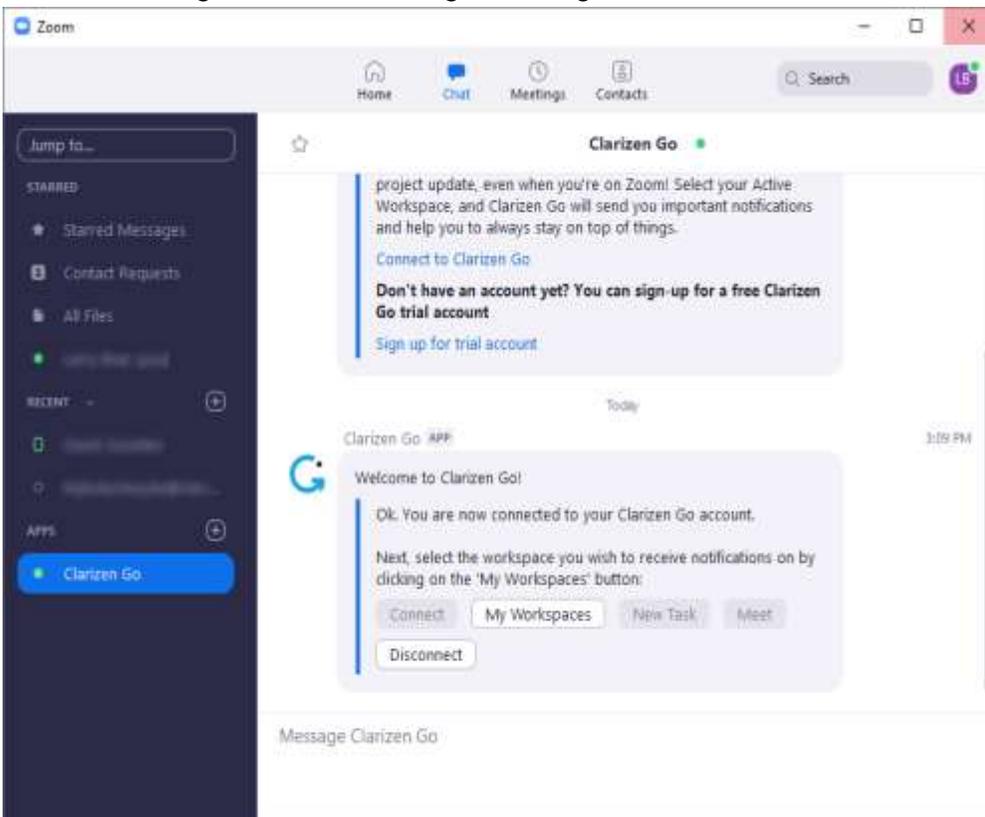

3. Now click **Connect to Clarizen Go**.
   If you do not have an account, you can click on the link to sign up.

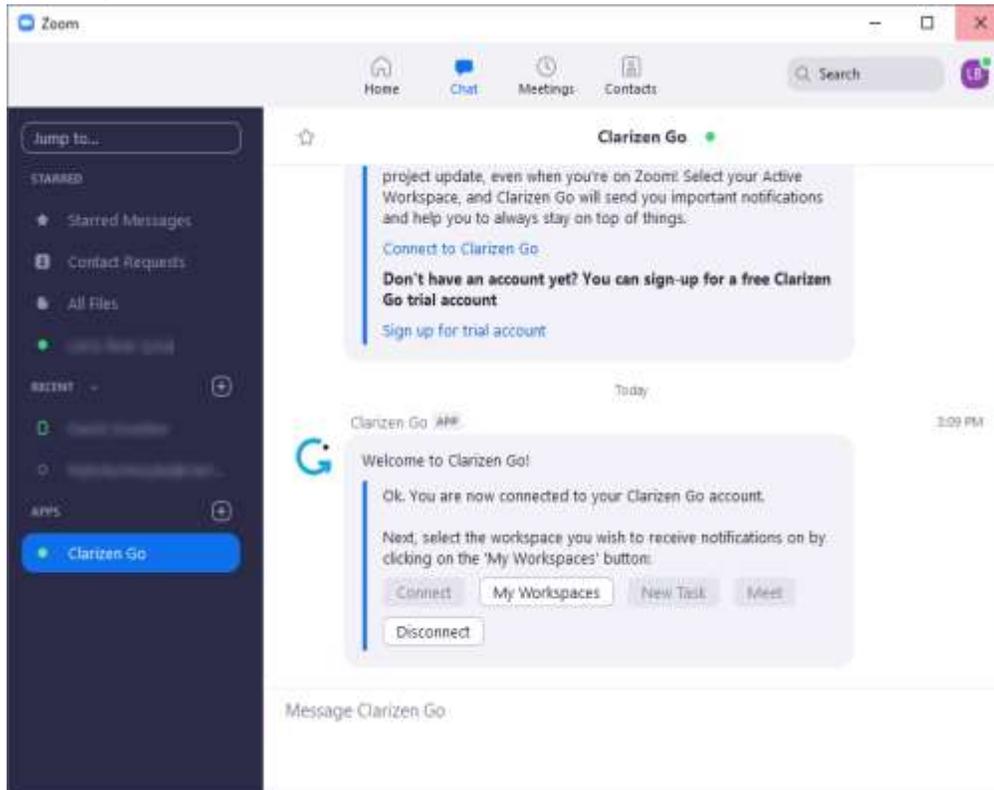4. Enter your Clarizen Go credentials and click **Sign in**.

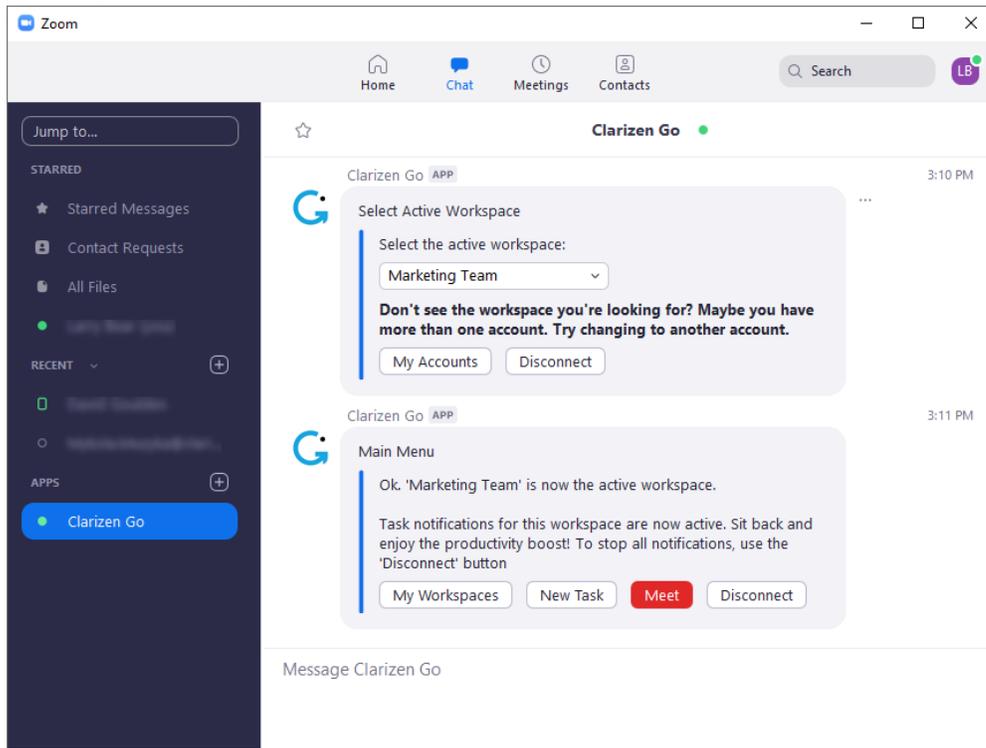5. You are now signed in and can begin working.

Using the Clarizen Go App
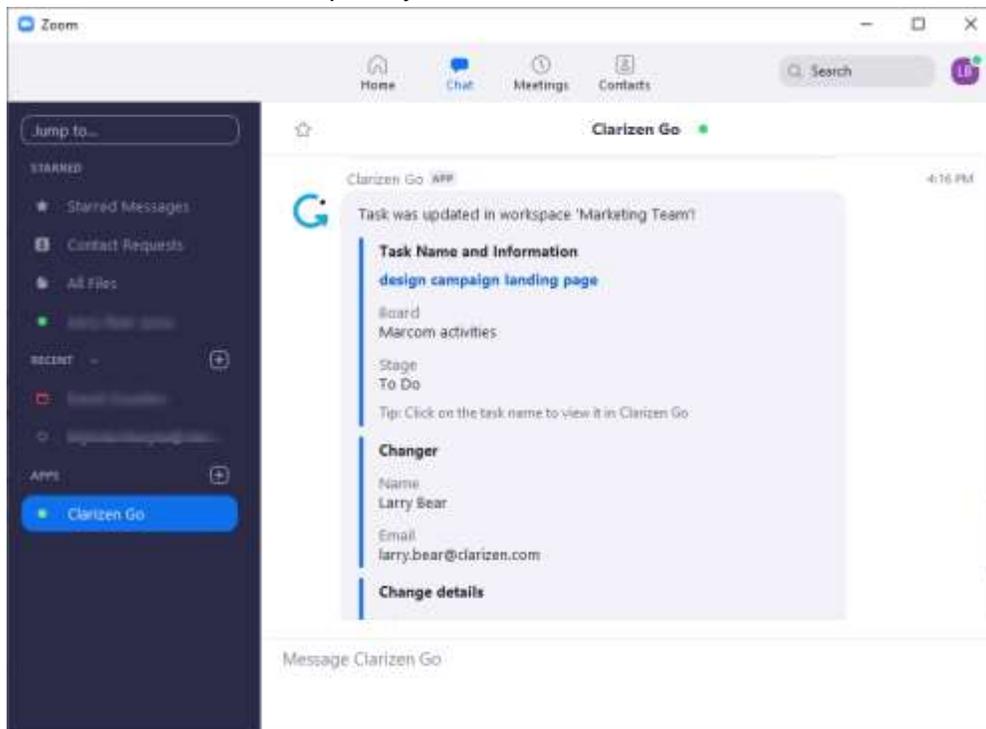
Selecting the Active Workspace

1. Click **My Workspaces** to choose the active Workspace.
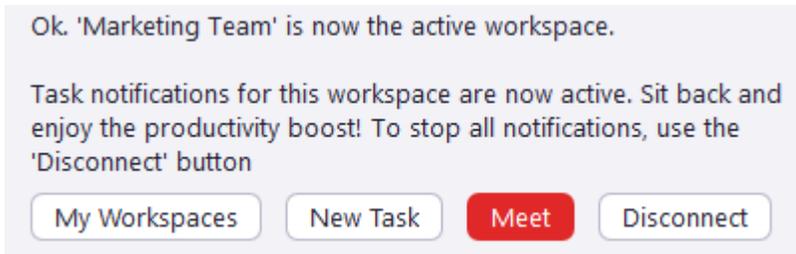
2. Select your Workspace.

You will now receive notifications from the selected Workspace when there are updates to Tasks, such as dates, priority, etc.
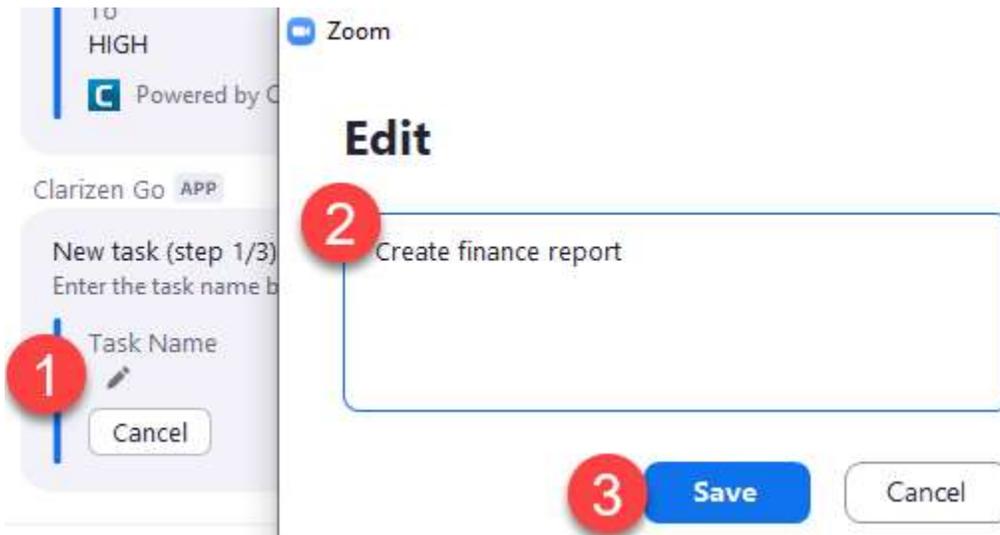

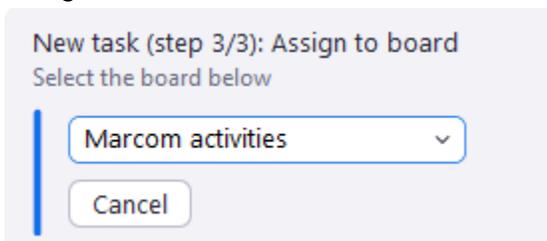You can click on the Task name to open it in Clarizen Go.
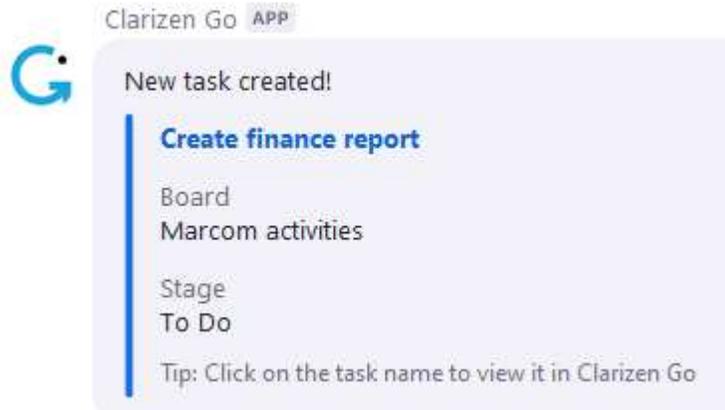
Creating a New Task

1. Click **New Task**.

Ok. 'Marketing Team' is now the active workspace.

Task notifications for this workspace are now active. Sit back and enjoy the productivity boost! To stop all notifications, use the 'Disconnect' button

| My Workspaces | New Task | Meet | Disconnect |

2. Enter a Task name and click **Save**.

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Clarizen Go APP

New task (step 1/3)
Enter the task name b

Task Name

Cancel

Edit

Create finance report

Save   Cancel

3. Enter the description in the same way (optional).
4. Assign the Task to a Board.

New task (step 3/3): Assign to board
Select the board below
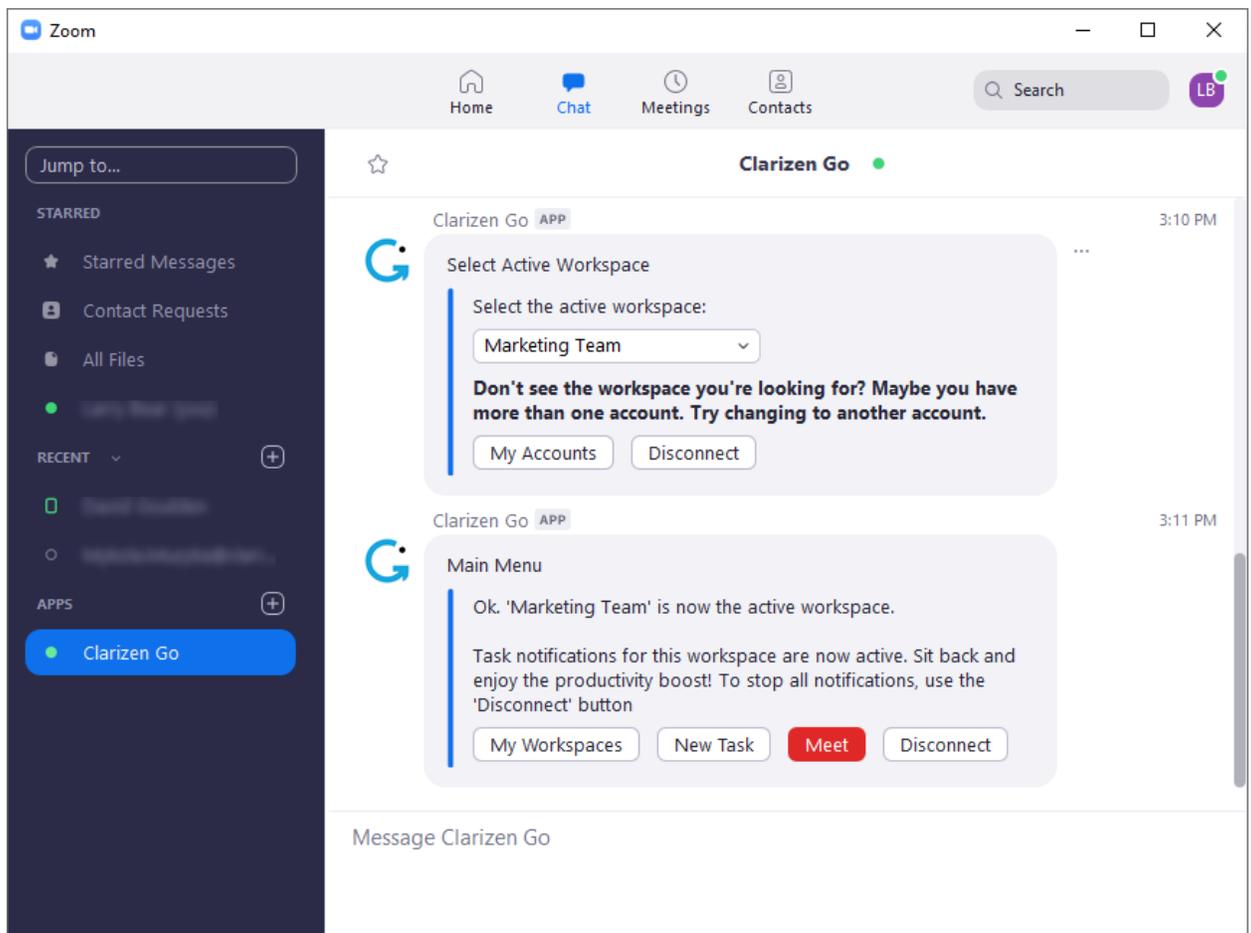
Marcom activities ⌄

Cancel

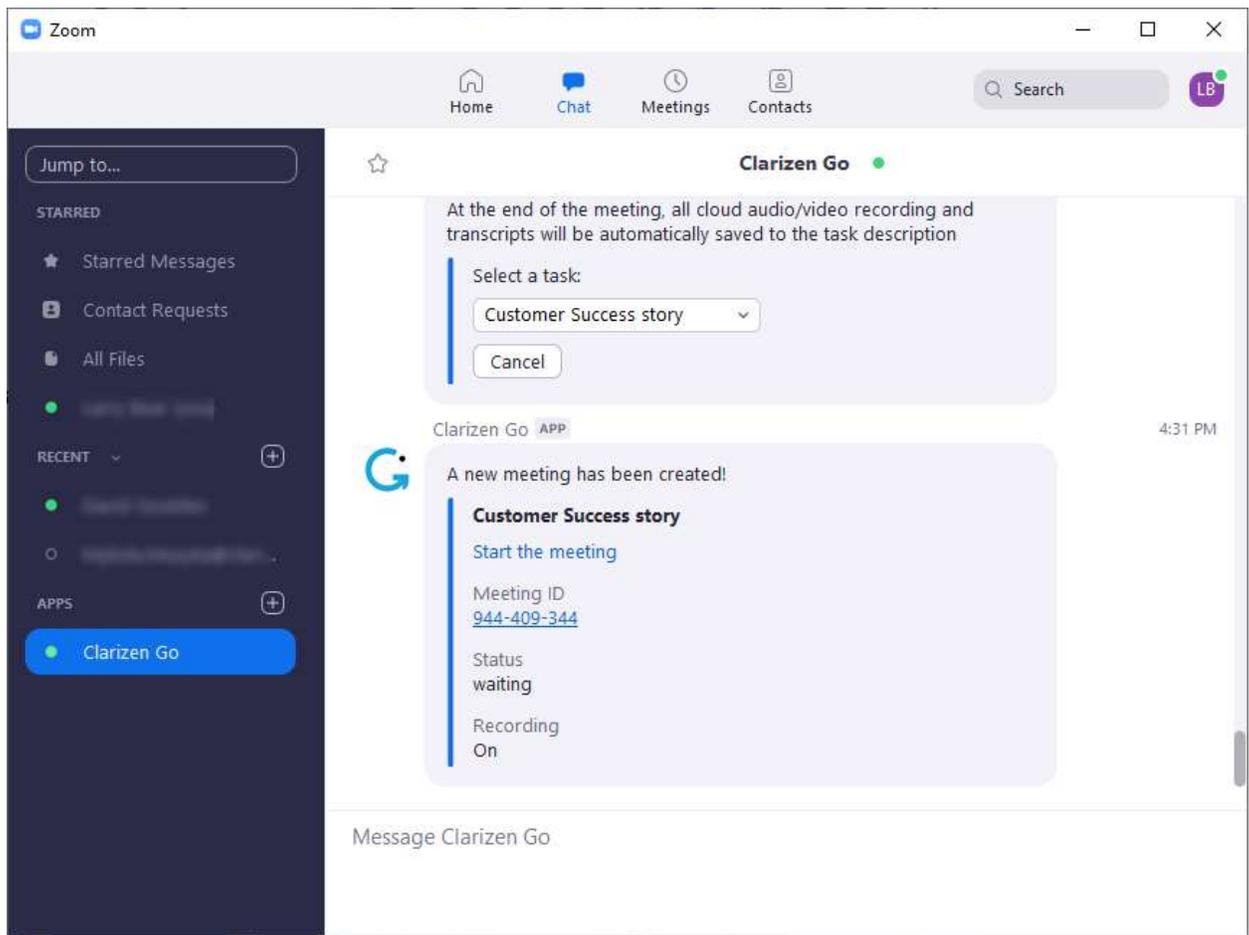The new Task is created and a notification is sent in Zoom.

Initiating a Meeting

1. Click **Meet** in the main menu.

2. Select the related Task.

3. Click **Start The meeting** to start the meeting.
4. Once the meeting has ended, a link to the recording and the transcript will be available in the Task description in Clarizen Go.

App Functionality and Commands

At any time while connected, type in *Help* to get a list of available commands.
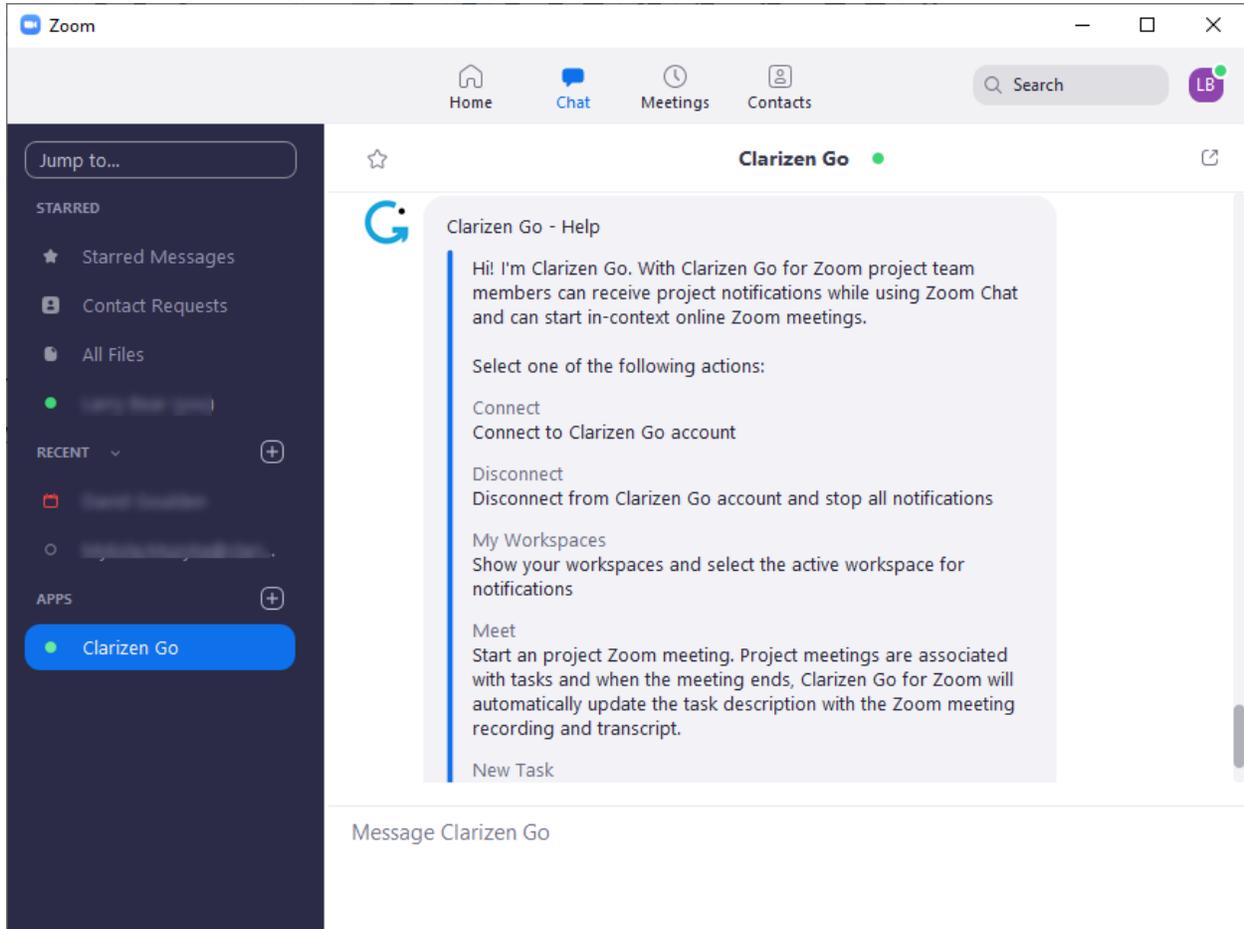
List of Commands

- Connect - Connect to Clarizen Go account
- Disconnect - Disconnect from Clarizen Go account and stop all notifications
- My Workspaces - Show your Workspaces and select the active Workspace for notifications
- Meet - Start a Zoom meeting. Meetings are associated with Tasks and when the meeting ends, Clarizen Go for Zoom will automatically update the task description with the Zoom meeting recording and transcript
- New Task - Create a new task in the Active Workspace

Disconnecting and Uninstalling

To disconnect your Clarizen Go account from Zoom:
- Type in **Disconnect** or select **Disconnect** from the available commands. You will be disconnected from all Workspaces.

To uninstall the app:
1. Go to the Zoom Marketplace.
2. Search for Clarizen Go and select the app, or go to your installed apps (**Manage** > **Installed Apps**).
3. Click **Uninstall**.

Help and Support

To learn more about Clarizen Go, visit our knowledge base and community.
For additional support, contact our support team at any time. You can expect a response within 24 hours.
Elite customers can call support 24/7.