LPL Account Setup Guide

This guide walks you through setting up Zocks for the first time and includes helpful articles and videos in the sections below.

Checklist for User Success

Phase 1

- [ ] Sign Up & Log In
- [ ] Review LPL compliance settings and prepare a client talk-track clarifying that Zocks is a no-audio, no-video recording solution.
- [ ] Connect Integrations
  - [ ] Calendar
  - [ ] Virtual Meeting Platform
  - [ ] CRM

Phase 2

- [ ] Update Meeting Assistant Settings
  - [ ] Update your AI Assistant's Name
  - [ ] Change Event Filters for your Meeting Assistant
- [ ] Enable Collaboration with your team
- [ ] Use Zocks in each meeting platform and ensure Zocks is attending as planned:
  - [ ] Virtual meetings
  - [ ] In-person meetings
- [ ] Test out Meeting Prep on one or more of your clients from the Upcoming Meetings
- [ ] Navigate to the Live Meeting tab during one of your Live Meetings to test out this functionality

Phase 3

- [ ] Utilize Past Meeting Results
  - [ ] Export meeting summary to your CRM
  - [ ] Export tasks to your CRM
  - [ ] Utilize the AI Assistant and Explainer features
- [ ] Customize your meeting outputs to match your layout and language
  - [ ] Pre & post meeting summaries as well as follow-up emails are a great way to customize and practice editing these items.

Zocks Dictionary

Live Meetings: The real-time view during a meeting, giving you client details, agenda, action items, and the AI assistant on hand while you're on the call.

Upcoming: Your list of scheduled meetings, each with meeting prep (summary, prep email, Ask Anything assistant) available beforehand.

Past Meetings: Your archive of completed meetings with summaries, transcripts, and outstanding tasks.

In Person Meeting: A meeting logged as face-to-face rather than a virtual meeting, still fully covered by prep, notes, and summary features.

Contacts: Your client/contact records, ideally linked to your CRM so the AI can pull history for meeting prep.

Setup: Account-level settings (e.g., adding or editing meeting types and customizing templates).

Profile: Your individual user settings.

Integrations: Where you connect Zocks to calendars, meeting platforms, CRM, and other tools.

Team: View of team members and their access/settings within your Zocks account.

Forms: Structured, clean insights showing the level of data completeness after an individual meeting - or aggregated across all Zocks meeting summaries + integrated platforms within the Contact Library.

Quick Start Guide

New User Signup

To get access to the Zocks platform:

1. Navigate to the LPL Sign Up Page
2. Complete the required information and Click Schedule your demo, your Account Executive will work with you and your team to schedule your demo/
3. After your demo your Zocks Account Executive will work with your team to create and set up your account.
4. You will receive an email from no-reply@zocks.io with a 'Click here to sign up' link
    a. If you do not see the email or your link has expired, please reach out to your account owner to request a new invite to be sent.
5. After clicking the sign up link, you will need to use 2 Factor Authentication to log in to your account.

Already using Zocks? Join a Webinar

Compliance

Compliance and Consent Notices

LPL has custom compliance disclaimers and images across AI Assistants, PDF exports, integration exports, and other user-facing experiences. Additionally, consent tracking features will help ensure you are keeping track of whether you gathered consent from your clients to use your Zocks AI Notetaker.

Data Retention Policy

Transcripts: 14 Days
Meeting summaries and all generated notes: 2 years

What does this mean?
Meeting transcripts are retained for 14 days. After 14 days, you will no longer be able to change the meeting type or templates. Meeting summaries and AI-generated structured data are retained in Zocks for up to two years. We recommend reviewing and saving all meeting notes and follow-up items to your external systems within 14 days of the meeting. Once the applicable retention period expires, the data is permanently deleted from Zocks and cannot be recovered.

Integrations

Go to Profile > Integrations to set up your connections.

Approved Integrations

Zoom, Teams, Salesforce, Dynamics, Hubspot, Practifi, Redtail, AdvisorEngine, SmartOffice, Wealthbox, XLR8, Outlook Calendar

Connecting Zocks with your Calendar

If you are unable to connect to your calendar, please contact your system administrator.

By connecting Zocks to your calendar, you will be able to:
1. Sync your upcoming meetings into Zocks from your designated calendar, and event filters can be set to ensure you are seeing the meetings you want
2. Zocks can automatically join your virtual meetings, and you can set event filters to control which meetings Zocks will join
3. Your Zocks AI Assistant will be in your Zoom Waiting Room (if enabled); you will need to allow the assistant into the meeting
4. You can also remove the Zocks AI Assistant from the Live Meetings page

Support Article: Configuring the AI Assistant to automatically join or show my events?
Support Article: Live Meetings in Zocks

Even without a calendar connection, you can still enable your assistant to join virtual calls using the Zocks Assistant Email address.

Connecting Zocks with Microsoft Teams and Zoom

Zocks' Teams and Zoom integration allows you to have your Zocks AI Notetaker with you on your meetings so that you can focus on your client while Zocks captures accurate, actionable, and 100% recording-free notes, so you never miss a detail.

To connect to Microsoft Teams, you do not need to connect individually. When your calendar is connected, the corresponding meeting provider integration is automatically activated. No additional connection is needed for Teams.

To connect to Zoom
1. Log in to Zocks
2. Click on the Integrations tab on the left side panel
3. Find Zoom and click Connect
4. You will be redirected to Zoom to log in and authorize the meeting app
5. Grant the required permissions
6. Zoom will now show as connected

Support Article: How to Integrate Zocks with Meeting Providers
Support Video: Integrating Zocks with Zoom
Support Article: Zoom Integration

Connecting Zocks to your CRM

1. Log in to Zocks
2. Click on the Integrations tab on the left side panel
3. Choose your CRM and click connect
4. Enter your CRM login credentials
5. Grant necessary permissions
6. Update the Zocks Admin options to reflect the settings you use in your CRM
7. Turn on Contact Sync (Under your CRM settings in Zocks)

By connecting Zocks to your CRM you will be able to:
1. Synchronize contacts between your CRM and Zocks
2. Save Zocks Meeting Summaries to your CRM
3. Create and assign Tasks in your CRM

Tip: If using Salesforce and you log into Salesforce with SSO try opening a new tab in the same browser and log into your Salesforce before clicking connect for your Salesforce integration.

Meeting Assistant

Navigate to Profile › Meeting Assistant to configure how your AI assistant behaves.

Personalizing Your Assistant

You can rename your assistant to something that resonates with your workflow — common names include Notetaker or Scribe.

Event Filters

Event filters control two things: when your assistant joins calls, and what appears on your Upcoming page.

Filter Type	What It Does
Auto Join	Defines when your AI assistant automatically enters the waiting room of virtual calls (Zoom, Teams).
Only Display on Upcoming	Controls which calendar event types (virtual or in-person) appear on your Zocks Upcoming page.

Support Article: How do I configure the AI Assistant to automatically join or show my calendar events?

Collaboration

If you are a Financial Advisor with an assigned Associate, Operations, or Client Services Manager, enable Collaboration so your team can access your meetings and contacts.

Enabling Collaboration

1. Go to Account › Profile Settings › Collaboration.
2. Toggle Collaboration On.
3. Select the team members to share meetings with from the dropdown.
4. Press Save. ⚠️ This step is required — changes are not applied until saved.

**This step is important so you can choose who needs to have access to your meetings and contacts to be able to assist you. You must choose specific users, if you toggle on and do not select users you will share your meetings and contacts with all users within your account.*

Meeting Functionality

Meeting Preparation

Get ready for client meetings with ease and efficiency with our AI Assistant. By generating comprehensive meeting preparation documents and pre-meeting emails, allowing modifications, and answering any questions about the upcoming meeting or clients, the AI Assistant ensures you are always well-prepared. This pulls in from past Zocks meetings and the integrations you have connected within Zocks (i.e. Redtail, Financial Planning Tool, etc.)

Support Article: Meeting Prep

Meeting Summary & Follow Ups

Zocks will generate a meeting summary, meeting details, follow up tasks, and a drafted follow up email. These can be synced to your CRM and the email can be sent through your default email provider.

Support Article: Post Meeting Summary

Templating

Meeting prep email and summaries, as well as post meeting summaries and follow up emails can be customized through our templating to match your layout and verbiage. Other parts of the platform can be customized to your preferences as well.

Support Article: Customize your experience!

Zocks Resources

Use these resources to get help, build skills, and stay current on product updates.

Resource	How to Access
LPL x Zocks Resource Hub	zocks.io/partner-hub/lpl
Zocks Help Center	Visit the Onboarding Journey or Zocks Help Center for step-by-step articles.
Zocks Academy	Access quick, practical courses from the bottom-left corner of your Zocks account. Build skills and earn certifications. You can also access it directly through this link: Zocks Academy
Zocks Video Library	youtube.com/@Zocks-Communications
Zocks Support	Available via Live Chat in the bottom-right corner of your Zocks screen for real-time assistance or via email (support@zocks.io)