

USC - Zoom Phone

Line Delegation



Using Zoom Phone Line Delegation

What is Line Delegation?

- Call delegation (also known as shared line appearance) provides an easy way for phone users to assign others to handle calls on their behalf.
 - For example, an executive can assign calling privileges to their assistant, allowing the assistant can make and receive calls on the executive's behalf.
- The **delegator** is the phone user that assigns phone privileges to another phone user or common area phone. Each delegator have up to 32 delegates.
 - The **delegate** is the phone user or common area phone that makes and receives calls on the delegator's behalf. Each delegate can be assigned to a maximum of 32 delegators.
 - **Shared lines** are direct phone numbers that belong to the delegator but can be used by their delegates.
- The **delegate** can access the delegator's direct phone numbers, meaning they can make and receive calls on behalf of the delegator.
 - Both **delegator** and **delegate** can see the status of the shared lines.
 - The **delegator** and **delegate** can place calls on hold and transfer them to each other.

What is Line Delegation?

- Delegator and delegate must have a [Zoom Phone license and calling plan](#)
 - [Delegation policy setting enabled](#)
 - Each phone user with call delegation can belong to multiple [call delegation](#) setups or shared line groups.
- **How to assign a delegate**
 - Sign in to the Zoom web portal.
 - Follow one of these options to navigate the phone settings page depending on if you're a phone user or admin:
 - Phone user: In the navigation menu, click Phone, then click the [Settings](#) tab.
 - Admin: In the navigation menu, click Phone System Management then [Users & Rooms](#). Click a phone user's display name, then click the User Settings tab.
 - In the **Delegation & Assistant** section, click **Set** or **Add**.
 - Select User or Common Area Phone, then specify the phone user or common area phone you want to assign as your delegate, then click Send Invite.
 - Note: The delegate will need to [accept the delegation request](#).
 - Use the check boxes to change the privileges (**Place Calls, Answer Calls, Pick up Hold Calls**)

What is Line Delegation?

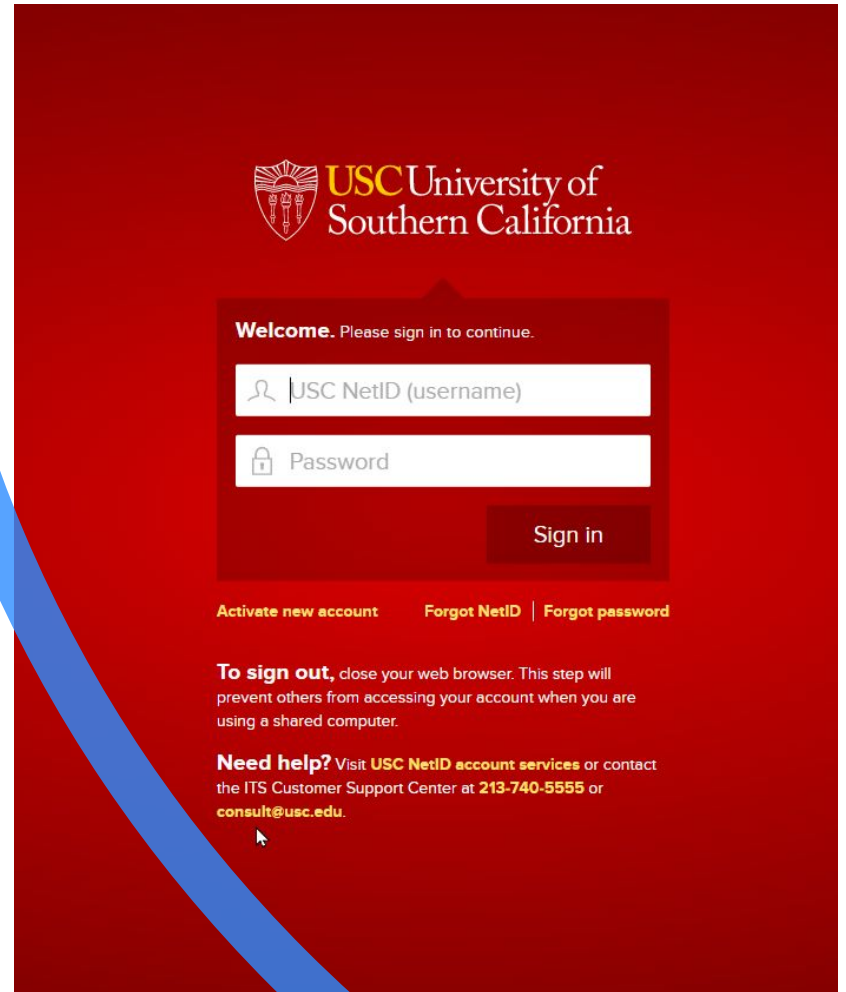
If someone requested you as their delegate, you can accept the delegation request before you can make and receive calls on their behalf. You can also follow these steps to view the delegators you have accepted delegation responsibilities for.

Notes:

- If you're an admin assigning a delegate for phone user, the delegation setup is forced and the delegate will not have to accept a delegation request.
- The delegate will receive a notification to accept the delegation request when they view their phone settings in the web portal. You will see a **Pending** label until the delegate accepts the request. After the delegate accepts the request, their name and extension will appear in the **Delegation** section.
- If you're assigning a common area phone as a delegate, a Zoom Phone admin needs to sign in to the web portal and go to the **Users & Rooms** page to accept the delegation request.

Sign in to Zoom

- ✓ Please go to usc.zoom.us
- ✓ Enter your USC NetID credentials
- ✓ Click **Sign in**.



Configure Zoom Phone

The screenshot shows the Zoom web interface for configuring a phone extension. The page title is "Quick setting your extension of Zoom Phone". The form includes the following fields and options:

- Company Number (205) 809-4088, Extension Number 10100
- Select country and area code: A dropdown menu showing "United States of America" and a text input field containing "408".
- Set your time zone. You can change it later in Profile: A dropdown menu showing "(GMT-7:00) Pacific Time (US and Canada)".
- Set PIN code to listen to voicemail by telephone: A text input field containing "000000".
- A blue "Setup" button at the bottom.

The left sidebar shows the navigation menu with "Phone" selected under the "PERSONAL" section.

- ✓ Go to **Phone**.
- ✓ Setup the **Country & Area Code**.
- ✓ Set the **Time Zone**.
 - To edit time zone at a later time go to **Profile** and select **Edit** under **Date and Time**.
- ✓ Set a **PIN**.
- ✓ Click **Setup**.

Configure Zoom Phone

Settings

zoom SOLUTIONS ▾ PLANS & PRICING CONTACT SALES SCHEDULE A MEETING JOIN A MEETING ▾ HOST A MEETING ▾

PERSONAL

- Profile
- Meetings
- Webinars
- Personal Audio Conference
- Phone**
- Recordings
- Settings

ADMIN

- Dashboard
- > User Management
- > Room Management
- > Phone System Management
- > Account Management
- > Advanced

History Voicemail Recording Settings

Site Main Site (Main Site)

Package US/CA Unlimited Calling Plan ⓘ

Number(s) (619) (United States)

Company Number (669)

Emergency Address ⓘ 55 ALMADEN BLVD, SAN JOSE, California 95113, United States [Manage](#)

Personal Emergency Address [Manage](#)

Outbound Caller ID Jacob Burridge - (619) (United States)

Country United States (+1)

Area Code ⓘ 669 [Edit](#)

Call Handling

Business Hours 24 Hours, 7 Days a Week [Edit](#)

✓ Manage **Emergency Address**.

✓ Create **Business Hours**.

Configure Zoom Phone

Delegation

The screenshot shows the Zoom Admin console interface. The main page is titled "Delegation & Assistant" and includes a search bar for users. A modal window is open, showing the configuration for a delegation. The modal includes a search bar for the user to be delegated to, a list of users, and a section for "Delegation Privileges" with three checked options: "Place Calls", "Answer Calls", and "Pick Up Hold Calls".

Zoom Admin Console - Delegation & Assistant

Assign delegation privileges to

User [Enter user name, email or Ext.] [Send Invite] [Cancel]

Delegation Privileges

- Place Calls
- Answer Calls
- Pick Up Hold Calls

[Delete Delegation]

- ✓ Click **Add**.
- ✓ Enter in the user name and collect **Send Invite**.
- ✓ Choose **Delegation Privileges**.

Configure Zoom Phone

Delegation

- ✓ When a new delegation comes in, click **View**.
- ✓ Select **Accept**.

The screenshot displays the Zoom Admin console interface for configuring phone delegation. The main content area is titled "Delegation & Assistant". Under the "Delegation" section, there is a list of users assigned delegation privileges: "Tyler Morrone" and "Collin Sage (Pending)". Below this, the "Delegation Privileges" section shows three checked options: "Place Calls", "Answer Calls", and "Pick Up Hold Calls". A "Delete Delegation" button is located below the list. The "Assistant for" section shows "Tyler Morrone (Site: Main Site)" with the privilege "Able to Place Calls". The "Desk Phone" section is partially visible at the bottom. A "Delegation Request" notification is shown in the bottom right corner, stating "You have a new delegation request." with a "View" link. In the foreground, a modal dialog box is open, titled "Accept request", with the text "Do you want to accept Tyler Morrone's delegation request?" and two buttons: "Cancel" and "Accept".

Configure Zoom Phone

Other Settings

The screenshot shows the Zoom Admin Console interface. At the top, there is a navigation bar with the Zoom logo, menu items for SOLUTIONS, PLANS & PRICING, and CONTACT SALES, and utility links for REQUEST A DEMO, 1.888.799.9666, RESOURCES, and SUPPORT. Below this is a secondary navigation bar with SCHEDULE A MEETING, JOIN A MEETING, and HOST A MEETING, along with a user profile icon. The main content area is titled 'Other Settings' and contains several configuration sections:

- Desk Phone(s)**: Includes a **Phone Screen Lock** toggle switch, which is currently turned off.
- PIN Code**: Shows a masked PIN (*****). A **Show or Edit** link is available.
- Others**: A section header for additional settings.
- Voicemail**: Includes an **Access** section with an **Add** link. A card below shows 'Jacob Burrige (Current User)' with a masked extension number.
- Blocked List**: Includes a **View or Edit** link and a **Block Calls without Caller ID** toggle switch, which is currently turned off.
- Hold Music**: Includes a dropdown menu set to 'Default' and a link to **Audio Library**.
- Audio Prompt Language**: Includes a dropdown menu set to 'American English' with the instruction: 'Set the default audio prompt language for your extension.'
- User Status**: Shows the user is 'Active'.

A blue chat bubble icon is located in the bottom right corner of the settings panel.



Thank You



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