

## Assign Delegation Privileges

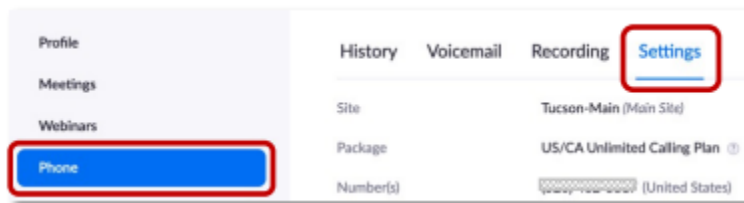
Delegating your Phone video is only applicable to users who have a licensed account

Call delegation, also known as shared line appearance, provides an easy way for phone users to assign others to handle calls on their behalf. Shared lines are direct phone numbers that belong to the delegator but can be used by their delegate. Both delegator and delegate must have a direct phone number or a calling plan.

As the delegator, you will initiate the process to send a delegation request to your delegate. This request does not initiate an email. A delegate must log into the Zoom web portal to accept the request.

### Initiate a Delegation Request to a User

1. Sign into the Zoom web portal at [arizona.zoom.us](https://arizona.zoom.us)
2. Navigate to the Phone Settings tab.



3. Scroll down to the Delegation & Assistant section.
4. Click the Set link next to Assign delegation privileges to.



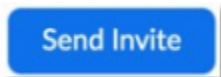
You can delegate your phone to a User or a Common Area Phone. Information on delegating to a Common Area Phone is covered at the end of this document.

5. To Assign delegation privileges to a User, make sure the delegation target is set to User then enter at least three digits of their name or extension in the text field to the right.

6. Select them from the list of possible matches.

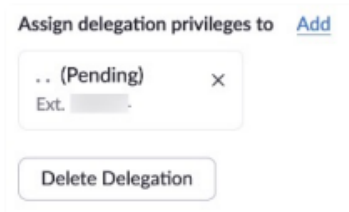


7. And click Send Invite.



Sending a delegation request does not initiate an email. A delegate must log into the Zoom web portal to accept the request. You may want to give them a heads-up.

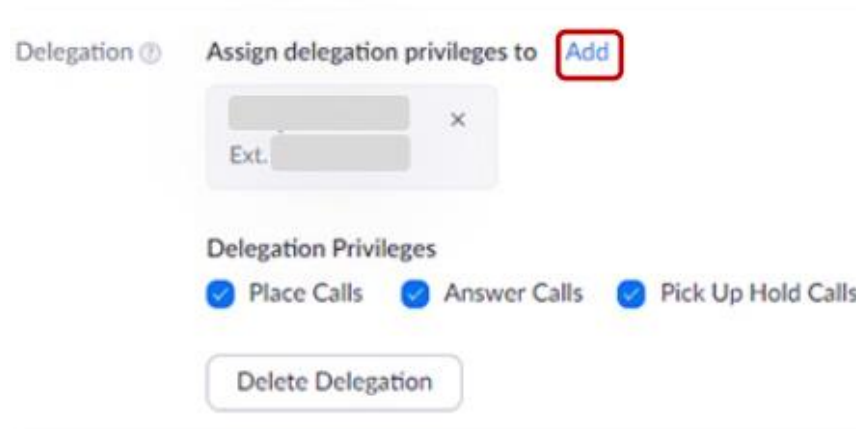
The request remains in a Pending status until the delegate logs into the Zoom web portal and accepts or denies the request.



8. Once your request has been accepted, the delegate appears in the Delegation section, and you are able to select or deselect the specific actions you wish to delegate to this person.

a. You can delegate the ability to Place Calls or Answer Calls on your behalf. When you delegate the ability to Answer Calls, your delegate will get the call notification for ALL incoming calls to your direct phone numbers.

b. You can also delegate the ability to Pick Up Hold Calls which makes it possible for you to transfer calls back and forth. Details on transferring calls on a shared line are covered in a separate document.



9. To add additional delegates, click Add and follow the same process to locate, select, and send another delegation invite.

### **Delegate to a Common Area Phone**

Instead of delegating your phone to a User, you may wish to delegate to a Common Area Phone. For example, this option would be useful if your department reception area uses one phone operated by a pool of rotating employees.

Note: When you delegate to a Common Area Phone, a Zoom Phone admin needs to accept the delegation request.

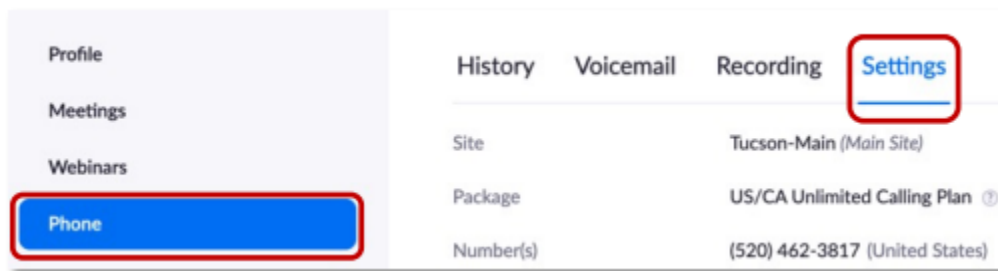
## Accepting a Delegation Request

Call delegation, also known as shared line appearance, provides an easy way for phone users to assign others to handle calls on their behalf. Shared lines are direct phone numbers that belong to the delegator but can be used by their delegate. Both delegator and delegate must have a direct phone number or a calling plan.

The delegator will initiate the process by sending you a delegation request. This request does not initiate an email. You must log into the Zoom web portal to see the request.

Follow these steps to accept a delegation request.

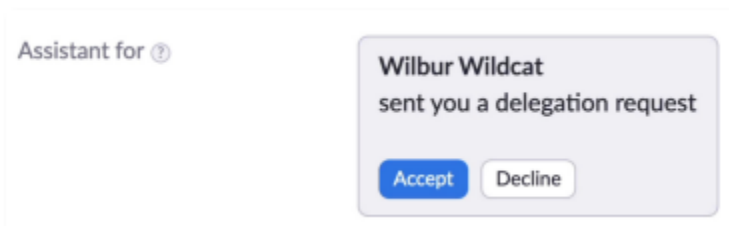
1. Sign into the Zoom web portal at [arizona.zoom.us](https://arizona.zoom.us)
2. Navigate to the Phone Settings tab.



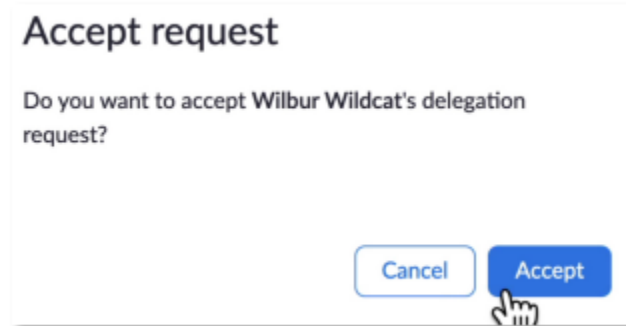
3. You may see a Delegate Request notification in the bottom right corner.
4. Click the View link in the notification or scroll down to the Delegation & Assistant section.



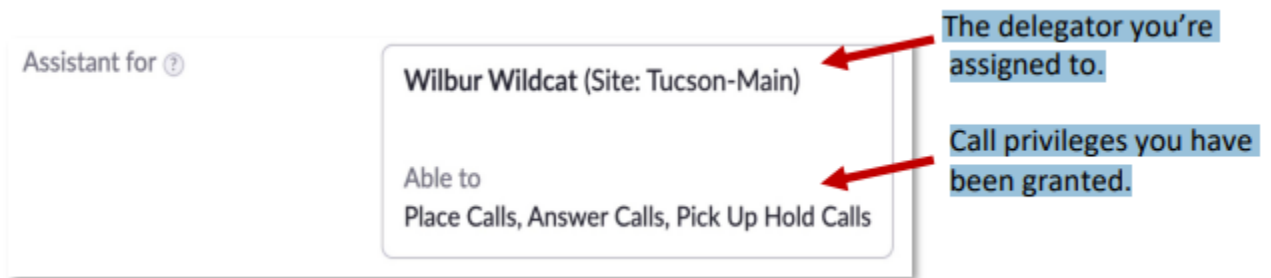
5. Any pending delegate requests will appear next to the Assistant for subheading
6. Click Accept. Created July 2021



7. Click Accept in the next dialogue box.



The web portal interface updates to show you are now an Assistant for the delegator.



Delegates can be granted the ability to Place Calls or Answer Calls on the Delegator's behalf. When you are granted the ability to Answer Calls, you will get the call notification for all incoming calls to the Delegators direct phone numbers.

You can also be granted the ability to Pick Up Hold Calls making it possible for you to transfer calls back and forth with the Delegator.

Note: Contact the delegator if you no longer want to be assigned as a delegate