Assign Delegation Privileges

Step-By-Step Instructions

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
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.
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.

Contact **UITS-Telco@arizona.edu** to establish, change, or remove telephone services or features. Contact the 24/7 Support Center ([http://247.arizona.edu](http://247.arizona.edu)) for Zoom app issues or service outage. Start an on-line chat at [https://support.arizona.edu](https://support.arizona.edu) or call 520-626-TECH (8324) or toll-free at 887-522-7929.