



QUICK START ZOOM.AI

Get the most of your new automated assistant

Learn About:



Smart
Meetings



Information
Discovery



Document
Generation

TABLE OF CONTENTS

About Zoom.ai	3
Smart Meetings	4
Information Discovery	10
Document Generation	18
Zoom.ai For Teams	25

HELLO.

You have a new automated assistant. What now?

Thank you for installing the Zoom.ai automated assistant. By now, you should have successfully installed the assistant to your preferred chat platform. Your assistant is built to help you with administrative tasks, so you can get back to the work that matters.

The assistant is powerful. You can get immediate value by getting started with three types of tasks:

- Schedule and prepare for meetings
- Find answers to a company's FAQs
- Generate standard documents instantly

This guide helps you try out each functionality so you can see which ones you find the most valuable. Let's get started.



SMART MEETINGS

TRY SMART MEETINGS IF...



- You have a lot of meetings on a daily or weekly basis
- You have internal and external meetings
- Scheduling takes up hours in your week
- You feel unorganized during your work day
- You feel unprepared before meetings

GETTING STARTED

Step 1: Set up your Meeting Preferences

- Log on to the Zoom.ai Web App at <https://app.zoom.ai>.
- Click on **Settings**
- Click on **Meeting Preferences**
- Update your preferences: from when you want your Daily Briefing to how long you want to have certain meeting types for.



Tip! Your assistant will learn most of your meeting preferences through your calendar, but you can unselect "**Learned**" to manually update them anytime.

The screenshot shows the 'Meeting Preferences' settings in the Zoom.ai web app. On the left, there is a sidebar with a 'Default' icon and label. The main settings area includes:

- Available From:** A dropdown menu set to '9:00am'.
- To:** A dropdown menu set to '5:00pm'.
- For:** A dropdown menu set to '60 minutes'.
- Starting At:** A row of checkboxes for time intervals: ':00' (checked), ':15', ':30' (checked), and ':45'.
- Working Days:** A row of checkboxes for days of the week: 'Sunday' (unchecked), 'Monday' (checked), 'Tuesday' (checked), 'Wednesday' (checked), and 'Thursday' (checked).
- Location:** A text field containing 'Toronto, ON, Canada'.
- Daily Down Time:** A dropdown menu set to '25%'.

Each setting has a 'learned' status indicator: a grey box with a white checkmark for 'Available From', 'For', 'Starting At', and 'Working Days'; and a grey box with a white 'X' for 'To'.

Step 2: Add any Virtual Meeting Details [Optional]

Not all of your meetings will be in person. Add your meeting details so your assistant can include them in the meeting invite when you choose this type of meeting.

- E.g. When you ask for a "Webex with Alex", your Webex details will be included in the invite.

The screenshot displays the Zoom.ai settings interface. On the left is a dark sidebar with the Zoom.ai logo and navigation links: Dashboard, Admin, Settings (highlighted), Tasks, Skills Help, and Logout. The main content area is light gray and contains four sections for virtual meeting details, each with a yellow header bar and a circular icon:

- Skype**: ID field with the value "zoom.ai1417".
- WebEx**: URL field with the value "https://www.uberconference.com/zoom2".
- Hangouts**: URL field with the value "meet.google.com/ycs-szkd-aak".
- Call**: Includes a "learned" checkbox (unchecked), an "Available From" dropdown set to "9:00am", a "To" dropdown set to "4:00pm", a "For" dropdown set to "30 minutes", and a "Phone" field with the value "647 111 1211".

Step 3: Try these Commands

All the names we use are examples. Please replace them with your own contacts.

Scheduling a Meeting:

"Meet with John"

or

"Call with Sandra next week for project fantastic"

or

"Lunch with Hassan on Thursday"

- Meeting types to try: *Meeting, Coffee, Dinner, Breakfast, Drinks.*
- Virtual Meetings: *Webex, Skype, and Call* (ensure your details are added in Step 2)
- Zoom.ai will email your invitee to select a time based on your availability.



Tip! Try adding a date range, topic or length of meeting.

E.g. *Meet with John next week for "Quarterly Budget Summary"*

Setting a Reminder:

"Remind me to follow up with Elon next week at 5pm"

- Set reminders through chat and they will be added in your calendar.

Managing your Calendar:

"What are my meetings with Sanjeev today?"

or

"Block 8 to 9 am every day this week"

or

"Postpone meeting with Frank"

- Ask Zoom.ai to manage your calendar events. Try some of your own questions.

See what your day looks like:

"What are my meetings today?"

- You will get daily briefings on your workday, and prior to your meetings to provide you more information on whom you are meeting with.

Get insights on your contacts:

"Who is Tara Smithsfield?"

- Your assistant will provide you information on your meeting attendees based on all available data. Use their name, or email.

INFORMATION DISCOVERY

TRY INFORMATION DISCOVERY IF...



You are an end user:

- In a role that requires you to know detailed information on a regular basis
- Who wants to be able to access answers even if you are mobile or on-the-go

An Administrator or IT Manager:

- Setting up FAQs for your team or organization
- Trying to reduce helpdesk call volume for issues that can be resolved via self-serve

GETTING STARTED

Create a FAQ that is accessible in your favourite chat platform.

Step 1: Log into the Zoom.ai Web App

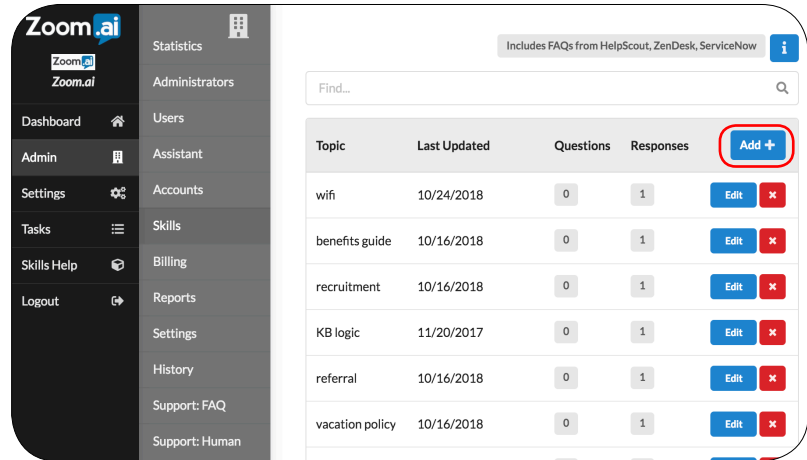
- Log on to the Zoom.ai Web App at <https://app.zoom.ai>

If you are an INDIVIDUAL USER (the FAQs are used for you only)

- Click on **Settings**
- Click on **Knowledge Base**
- Click **Add**

If you are an ADMINISTRATOR (the FAQs are used for a team)

- Click on **Admin**
- Click on **Skills**
- On the **Knowledge Base** section, click on **Configure**
- Click **Add**



Step 2: Determine your Topic

- Determine what the topic of your FAQ is.



Tip! Click on the "+" to add additional key words that you think may be relevant.

- Don't worry about determining how a user may ask a questions regarding your topic. Zoom.ai will determine that for you.

Step 3: Add Clarifying Questions (Optional)

- Answers to an FAQ can vary based on different variables. For example, the answer to *"how to set up a printer"* can differ based on which floor a user is on.
- Add your clarifying questions and options based on the variable.

Zoom.ai

Zoom.ai

Zoom.ai

Dashboard

Admin

Settings

Tasks

Skills Help

Logout

#1

Response Type

Text

Fixed

Selection

Date

Money

Number

Phone

URL

Email

Math

Bullet Points

Question (to ask user)

Looking for printer set-up instructions for the printer closest to you? First, select your floor:

Variable

floor

Options

16th floor	Value	Keywords	
4th floor	Value	Keywords	
17th floor	Value	Keywords	
18th floor	Value	Keywords	

New Option

Step 4: Determine your Response

- Add your response or responses (if you have multiple variables) to the **Answer template**.
- If you have multiple variables, use the **Criteria** section to select the variable that the answer pertains to.
- Repeat for other variables if necessary.

The screenshot displays the Zoom.ai web interface. On the left is a dark sidebar with navigation links: Dashboard, Admin, Settings, Tasks, Skills Help, and Logout. The main content area is titled '#1 Answer template' and includes a 'cancel' button and a 'save' button in the top right corner. The 'Answer template' section contains a text area with the following text: 'Ok. Here are your instructions to set-up and install a printer for the 16th floor: 1. Download and install the driver. Link here: <http://www.support.xerox.com/support/workcentre-7800-series/downloads/> 2. Use the IP address 10.10.25.20 for the 16th floor printer when prompted in the installation.' Below this is the 'Criteria (to ask this question)' section, which features a dropdown menu with 'floor' selected, followed by 'equals', and a text input field containing '16'. A 'New Criteria' button is located below the criteria input. The 'Email the summary to this user (email address)' section has an empty text input field. The 'Language' section shows radio buttons for English (selected), Spanish, French, Portuguese, Italian, and Japanese. At the bottom, under 'Options:', there is a checkbox labeled 'Email the summary to user' which is currently unchecked.

Zoom.ai

Dashboard Admin Settings Tasks Skills Help Logout

#1 Answer template

cancel save

Ok. Here are your instructions to set-up and install a printer for the 16th floor:
1. Download and install the driver. Link here: <http://www.support.xerox.com/support/workcentre-7800-series/downloads/>
2. Use the IP address 10.10.25.20 for the 16th floor printer when prompted in the installation.

Criteria (to ask this question)

floor equals 16

New Criteria

Email the summary to this user (email address)

Language


☒ English ☐ Spanish ☐ French ☐ Portuguese ☐ Italian ☐ Japanese

Options:

☐ Email the summary to user


Step 5: Test your FAQ!

- Ask your assistant a question pertaining to your **Topic**.
E.g. "How do I set up a printer?"

 **Assistant @ Zoom.ai**

[Conversation](#) [About](#)

1:33 PM
how do I set up a printer?

 Assistant @ Zoom.ai 1:33 PM
Sure Winnie, I can help you with your question regarding '**how do I set up a printer?**'.
Looking for printer set-up instructions for the printer closest to you? First, select your floor:
#1: 16th floor
#2: 4th Floor
#3: 17th floor
#4: 18th floor

1


2

3

4

Exit

1:33 PM
1

 Assistant @ Zoom.ai 1:33 PM
Ok. Here are your instructions to set-up and install a printer for the 16th floor:
1. Download and install the driver. Link here: <http://www.support.xerox.com/support/workcentre-7800-series/downloads/>
2. Use the IP address 10.10.25.20 for the 16th floor printer when prompted in the installation.

PLAY AROUND WITH THE POSSIBILITIES

Here are how FAQs can be used across an organization.

IT FAQs

- What is the wifi login info?
- How do I submit a ticket?

Onboarding FAQs

- How do I set up email signature?
- What is the company vacation policy?

Role-specific FAQs

- What are the accounting principles for X region?
- How does our product leverage machine learning?

Have an existing knowledge base with FAQs?

We can import your knowledge bases from **ServiceNow** or **Zendesk**.
Contact us at hello@zoom.ai to find out how.

DOCUMENT GENERATION

TRY DOCUMENT GENERATION IF...



- You are in a role that requires you to draft quotes or proposals to clients
- You're in a role that requires you to draft NDAs or employment packages
- You feel like you keep creating the same document over and over
- You want to set up an easy way for others to fill out administrative forms

GETTING STARTED

Document generation allows you to quickly create standard documents with customized fields, right through chat.

Step 1: Determine your Document and Variables

Your variables are the customizable fields you want to include in your document.

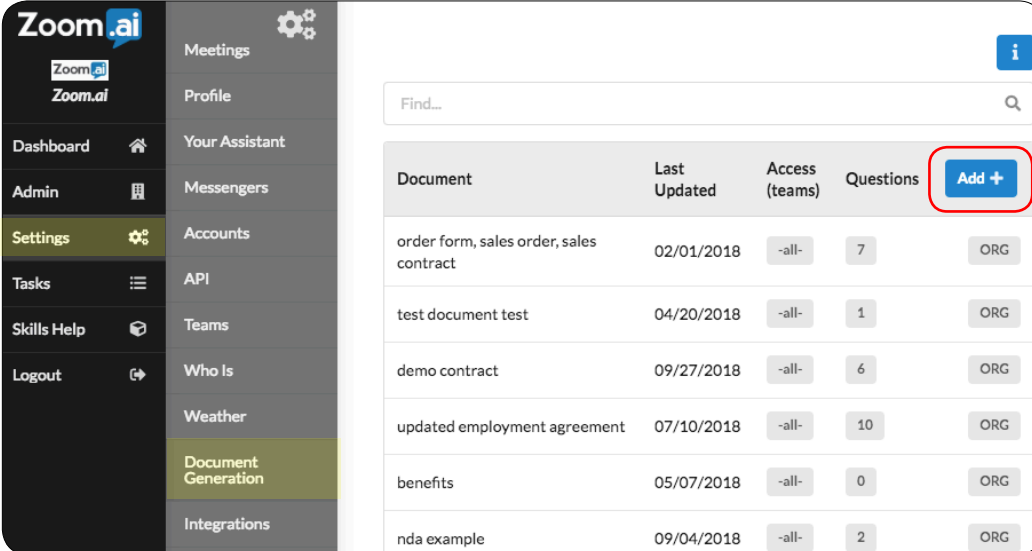
- Determine the variables that require customization. For our example of an NDA, we need to customize the “Day”, “Month”, “Name”, “Company”, and “Address”.
- Within your document, name the variables with **{ }** around them. This helps your assistant identify which fields require customization.

CONFIDENTIALITY AGREEMENT

THIS AGREEMENT, made as of this {day} day of {month} by and between {name} (“{ company} ”), having its principal office at {address} and ZOOM.AI (“ZOOM.AI”) having its registered office at 325 Front St West, Toronto, Ontario, M5V 2Y1, hereinafter collectively referred to as (“Parties”).

Step 2: Upload in the Zoom.ai Web App

- Log on to the Zoom.ai Web App at <https://app.zoom.ai>.
- Click on **Settings**
- Click on **Document Generation**
- Click "Add"



The screenshot displays the Zoom.ai web application interface. On the left is a dark sidebar with navigation options: Dashboard, Admin, Settings (highlighted), Tasks, Skills Help, and Logout. To the right of the sidebar is a vertical menu with options: Meetings, Profile, Your Assistant, Messengers, Accounts, API, Teams, Who Is, Weather, Document Generation (highlighted), and Integrations. The main content area shows a table titled 'Document Generation' with columns: Document, Last Updated, Access (teams), Questions, and an 'Add +' button (highlighted with a red box). The table contains six rows of document entries.

Document	Last Updated	Access (teams)	Questions	
order form, sales order, sales contract	02/01/2018	-all-	7	ORG
test document test	04/20/2018	-all-	1	ORG
demo contract	09/27/2018	-all-	6	ORG
updated employment agreement	07/10/2018	-all-	10	ORG
benefits	05/07/2018	-all-	0	ORG
nda example	09/04/2018	-all-	2	ORG

Step 3: Set Up your Document

- Select your **Document Name**. This is what the assistant will know it as.



Tip! Give it multiple names using a comma for easier identification.

- Select a location where your document lives. Alternatively, upload a new document to Zoom.ai.
- **Optional:** By default your document will be generated in it's original state (e.g. .docx, .pptx, .xlsx), but you can select to convert it to a PDF upon completion.

The screenshot shows the Zoom.ai web interface for setting up a document. On the left is a dark sidebar with the Zoom.ai logo and a menu including Meetings, Profile, Your Assistant, Messengers, Accounts, API, Teams, Who Is, Weather, and Document Generation. The main content area has a top right with 'Save' and 'Cancel' buttons. Below is a 'Document Name' section with a text input containing 'NDA Example, NDA Contract, Confidentiality Agreement'. The 'Account' section has radio buttons for Onedrive, Box, Dropbox, and 'Upload: Upload from my computer' (which is selected). The 'File:' section shows a dropdown set to '-none-' and an 'Upload' button. The 'File Conversion:' section has a checkbox for 'Convert to PDF when document is generated' which is currently unchecked.

Step 4: Add Questions to prompt your Variables

- Add your questions. Be sure to match your variables to the ones you have in your document.



Tip! Write your questions in a way that explain what information you are asking for. This way, you can share your document template with others within your organization and they will still be able to understand what information you need.

Questions:

#1

Response Type
☒ Text ☐ Fixed ☐ Selection ☐ Date ☐ Money ☐ Number ☐ Phone ☐ URL ☐ Email ☐ Math ☐ Bullet Points

cancel **save**

Question (to ask user)

Who is the recipient of the NDA?

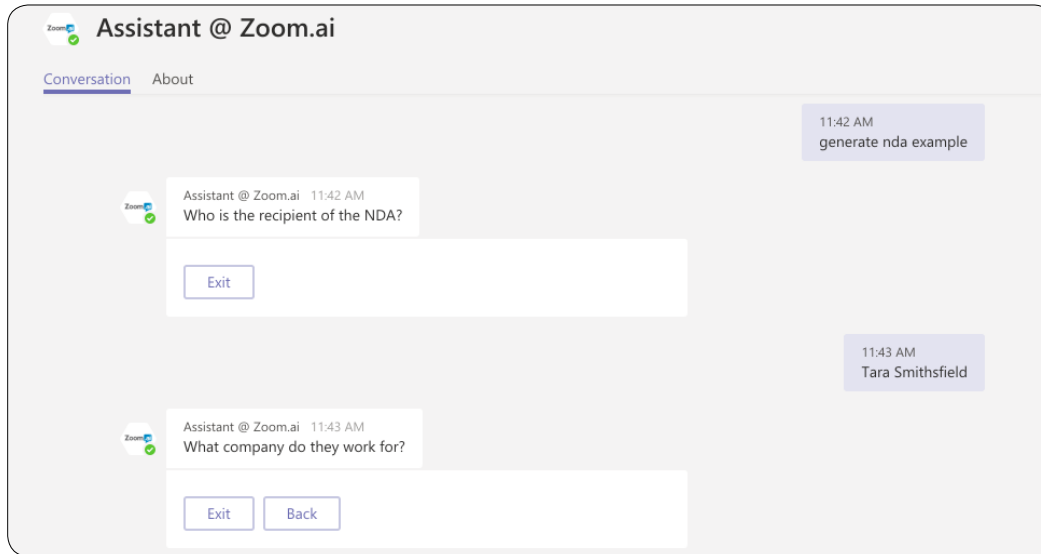
Variable (in document) ⓘ

name

Default Value ⓘ

Step 5: Test your Document!

- Ask your assistant to “Generate” your document.
E.g. “generate NDA example”



Zoom.ai works better in teams.

- Imagine your assistant knowing all your teams' schedules for easier meeting booking.
- Imagine FAQs that your entire team can access.
- Imagine using documents that your colleagues have already templated.

Discover what Zoom.ai can do for your team.

Schedule a demo at zoom.ai/book-a-demo.



Need Help?



IN-CHAT

Ask your assistant for *"help"* in your chat platform



LIVE SUPPORT

Available 9:00am - 5:00pm EST,
at <https://drift.me/zoomsupport>



EMAIL

Email us at hello@zoom.ai



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