

10 Ways to Get Started Using AI Companion



A first-time guide to common AI use cases

December 2023

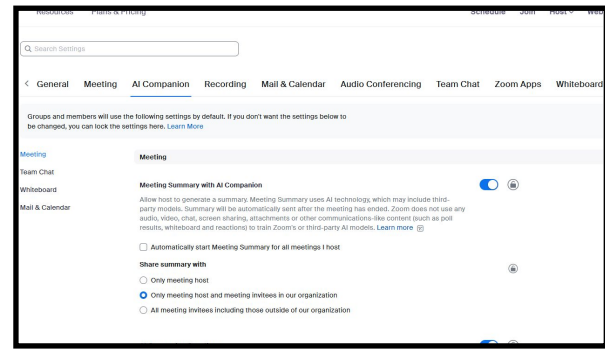
zoom

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Enabling AI Companion



Turn on AI Companion at the admin level

By default, all AI companion features are disabled, but Zoom gives admins granular control over activation of the features through account and group-level settings.

You can enable Zoom AI Companion in your admin portal. To find your admin portal, sign in to your Zoom account on zoom.com. If you are the administrator of your company's Zoom account, you will then be able to turn on AI Companion by following the instructions linked below.

- Smart Recording must be [enabled in Recording settings](#) before starting a meeting that will be recorded to the cloud. This can be enabled at the account, group, and user levels.
- If enabled by an admin, the in-meeting features, [Meeting Summary](#) and [In-Meeting Questions](#), can be enabled by meeting hosts before or during a meeting.
- Enablement of [Chat Compose](#) and [Thread Summary](#) for Team Chat is currently only available to admins at the account level.
- Email Compose can be [enabled by admins at the account and group levels](#).
- Whiteboard Content Generation can be [enabled at the account level](#).

Zoom AI Companion is now included at no additional cost for customers with the paid services assigned to their Zoom user accounts.

Zoom AI Companion may not be available for all regions or industry verticals.

For current information on AI Companion availability, please refer to our [support article](#).

Need more help getting started? Check out our Learning Center Course, [AI Companion for Administrators](#).

Meeting Summaries



Let AI Companion take notes for you

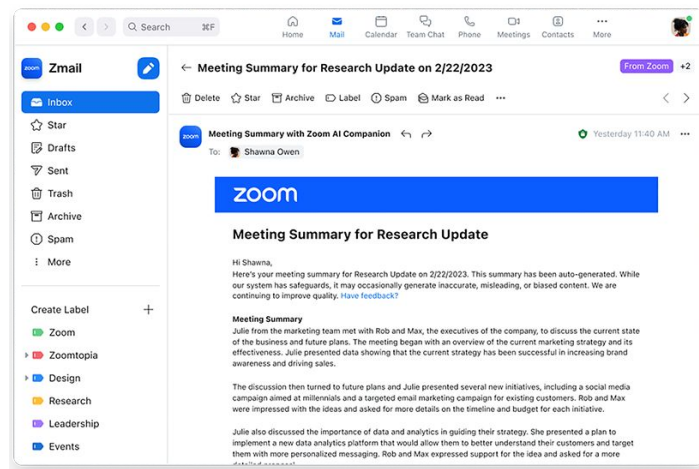
During a live meeting, the host can enable meeting summary to [create a summary of the meeting](#) from the time it's enabled. The summary is automatically shared with the host and can be shared with other participants by email and through Team Chat if continuous meeting chat is available for the meeting, making it easy for attendees to review the key points of the meeting and the topics that were discussed. The meeting does not need to be recorded to use this feature.

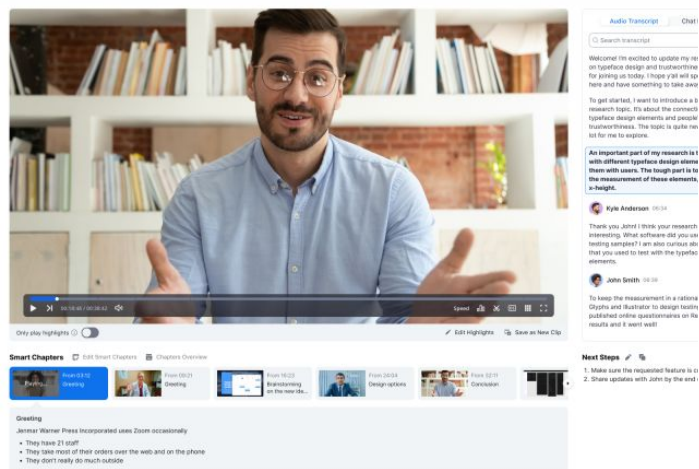
For meetings you host, you can start or stop the meeting summary through in-meeting controls. The summarization of the meeting only begins when the host or co-host clicks **Start Summary**. Users can also adjust their settings to have meeting summary start as soon as the meeting starts, skipping the need to manually initiate meeting summary in their meetings.

Note: This does not require the host to be present, as the meeting summary generation will begin as soon as someone starts your meeting.

Summaries for meetings you hosted can be managed from the web portal.

Check out our [support article](#) for more information on how to use meeting summary with AI Companion.





Smart Recording



Skip to the important parts of your recordings

Cloud recordings and audio transcripts can only be used to provide the Smart Recordings feature if cloud recordings are enabled by the account administrator and meeting recording is enabled by the meeting host. You will receive email notifications when the recording and transcript are finished processing. These emails include links to [view your recordings and transcript](#).

Once the cloud recording and audio transcript have finished processing:

1. Sign in to the Zoom web portal.
2. In the navigation menu, click **Recordings**.
3. On the **Cloud Recordings** tab, click the name of the recorded meeting or webinar. You will see a list of [recording files](#).
4. Click the video thumbnail with the play icon. The recording will open and the transcript text appears to the right of the video.

If enabled, Zoom AI Companion will highlight the most important parts of the session. You can manually adjust highlights as needed and can save highlights as separate files to cut unnecessary parts of the recording.

If enabled, Zoom AI Companion will automatically group the recording into different sections with timestamps. You can click on a chapter to watch the part of the recording starting at that timestamp. Viewers who watch the cloud recording can see the smart chapters and next steps.

Next Steps are located below the **Audio Transcript** panel of the cloud recording view. You can do either of the following as needed:

- Click the pencil icon to edit next steps, then click **Save**.
- Click the copy icon to copy the text to your clipboard, then paste it anywhere you want to share it with others, such as an email or chat message.

Check out our [support article](#) for more information on how to use smart recording with AI Companion.

Meeting Coach

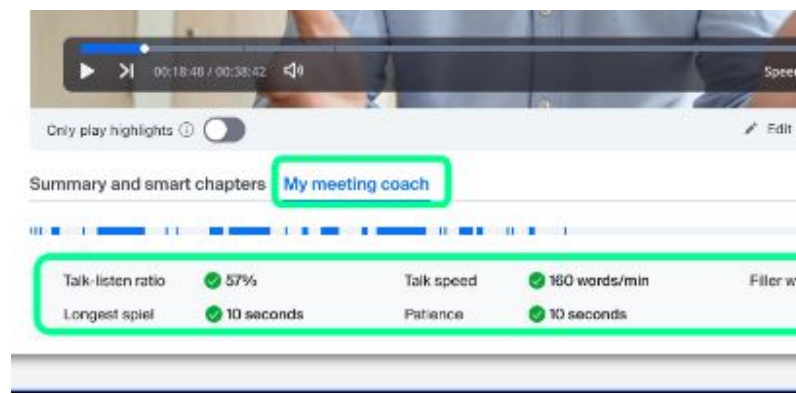


Get feedback after your meetings

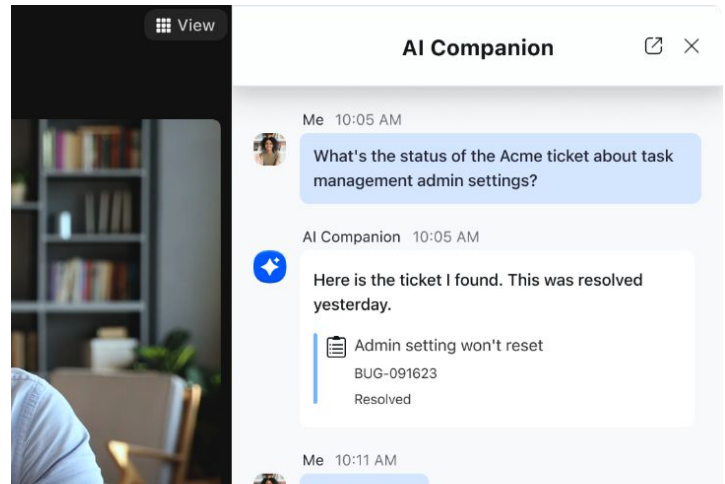
AI Companion Smart Recordings also provides users with meeting coach capabilities. After setting up Smart Recordings using the instructions on the previous page, simply navigate to “My meeting coach” in the resulting recording.

This will provide hosts with valuable insights into how they engage with meeting participants during Zoom Meetings including:

- Talk-listen ratio
- Talk speed
- Filler Words
- Longest Spiel
- Patience



In-Meeting Questions



Stepped away from the meeting? Find out what you missed

When the meeting starts, the host will need to manually start AI Companion so that it is available to in-meeting participants.

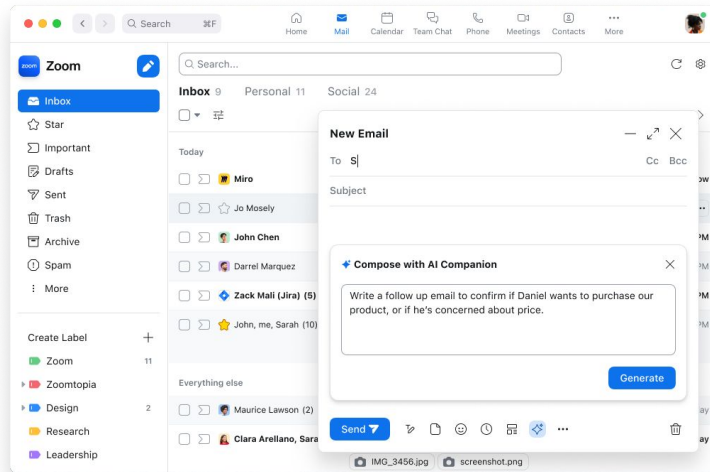
1. [Start a meeting](#) as the host with the Zoom desktop client.
2. In the meeting control toolbar, click **AI Companion**. The AI Companion panel will open.
3. Under **Who can ask questions to AI Companion?**, select which group of meeting participants can interact with AI Companion.
4. Click **Start** to begin having the meeting conversations analyzed.
5. Click **Got it** to confirm.
The meeting discussions will begin to be analyzed, and participants will see a notification informing them that AI Companion is active.

Once AI Companion is active in the meeting, all participants will be able to ask questions about the meeting discussions thus far. It's important to ensure that your [caption language is set to your spoken language](#) so AI Companion can transcribe your speaking language correctly, which improves the quality of the generated transcript for AI Companion questions. If no caption language has been set, English is used by default.

1. In the meeting control toolbar, click **AI Companion**. The AI Companion panel will open on the right side of the meeting window.
2. Click a provided question, or click the text compose box at the bottom of the panel to enter a custom question. Zoom's AI Companion will provide a generated response based on what it has analyzed thus far in the meeting.
3. (Optional) Click either thumbs up or thumbs down to rate the generated response.
4. Enter another custom question, or click the ellipsis to view additional preset questions.

For more information about in-meeting questions, including a list of supported languages, check out our [support article](#).

Email Compose



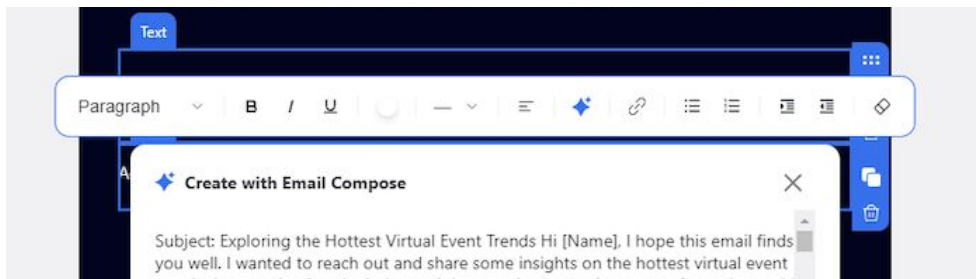
Save time drafting emails in Zoom Mail

Sometimes finding the right words can be challenging. AI Companion can assist when [drafting a new email or responding to an email thread](#).

Here is how to compose a new email using Email Compose with Zoom AI Companion.

1. Sign in to the Zoom desktop client.
2. Click the **Mail** tab. (Note: You will need to have [Zoom Mail and Calendar Clients enabled](#).)
3. In the top-left corner, click the **Compose** icon, or click to open an email you want to reply to or forward. Drafting a new email will open a new email window in the bottom-right corner, while replying to or forwarding an email will open the compose box below the received email.
4. At the bottom of the email window, click the AI Companion icon. A **Compose with Zoom AI** window will open to generate a message.
5. In the window, provide a draft of what you want your response to look like, or enter a command in the **Tell AI Companion to...** box.
This gives additional context and a sample of your writing style for Zoom AI Companion to mimic in its generated reply. This can be up to 1000 characters.
6. Click **Generate**. Your generated response will appear.
7. (Optional) If you do not want the generated response, click **Try another** to generate a new response.
8. (Optional) Reconfigure the response with the **Make Longer**, **Make Shorter**, or **Change Tone to...** options.
 - a. Select one of these options, and click **Generate** for a new response.
 - b. Add or adjust your drafted response to better guide and influence the rephrased response.
9. When you are satisfied with the generated response, click **Insert** or **Replace**. **Insert** will copy the generated response into the reply compose box without changing any previous drafts you have created. **Replace** will copy the generated response into the reply compose box and overwrite the current draft.
10. Press **Enter** or click the send icon.

For more information, check out our [support article](#).



Email Compose for Event Invitations



Generate draft invitation emails for your events

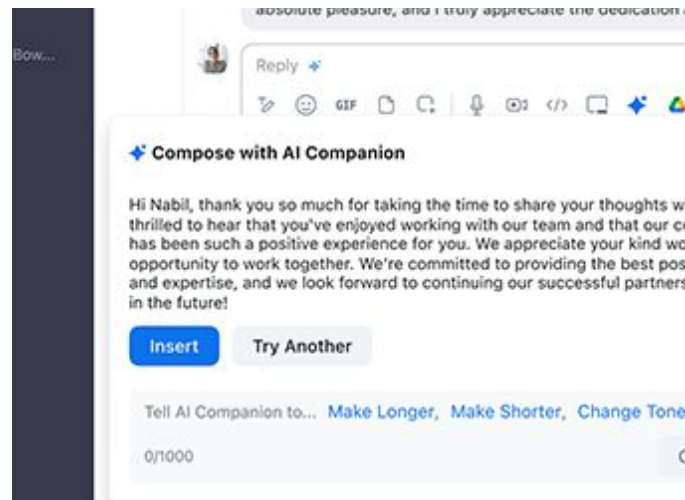
There are many tasks involved in coordinating a successful virtual or hybrid event. Thanks to AI Companion, you can now save time when drafting invitation emails.

Here is how you can get help from AI Companion when drafting invitation emails in Zoom Events.

1. Open [Zoom Events](#).
2. Navigate to your [Emails](#) tab.
3. (Optional): For more information about the branding and styles available in the Email Builder, check out this [support article](#).
4. Click on the **AI Companion** icon. You will have the ability to type in a prompt.
5. Click **Generate**. Your generated response will appear.
6. (Optional) Reconfigure the response with the **Make Longer, Make Shorter, or Change Tone to...** options.
 - a. Select one of these options, and click **Generate** for a new response.
 - b. Add or adjust your drafted response to better guide and influence the rephrased response.
7. When you are satisfied with the generated response, click **Insert**. **Insert** will copy the generated response into the reply compose box.

For more information, check out our [Guided Tour](#).

Team Chat Compose



Draft responses with compose in Team Chat

Chat Compose with AI Companion helps you write Team Chat messages by using context from your conversation. You'll maintain the ability to change messages by adding tone, inputting prompts, or changing the length of the message to give you confidence in what you're communicating.

How to reply to a message using Team Chat Compose with AI Companion

1. Sign in to the Zoom [desktop client](#).
2. Click the Team Chat tab. ([Team Chat](#) is included with Zoom One plans.)
3. Next to the message you want to respond to, click the ellipsis icon.
4. Click **Reply with AI Companion**. A window will open to generate a response. The message you are responding to will be the basis for the generated reply.
5. **Tell AI Companion to... (Optional)**: Provide a draft of what your response would look like, or enter a command for AI Companion. This gives additional context and a sample of your writing style for AI Companion to mimic in its generated reply. This can be up to 1000 characters.
6. Click **Generate**. Your generated response will appear.
7. (Optional) If the generated response is not entirely satisfactory, click **Try another** to have a new response generated.
8. (Optional) You can reconfigure the response with the **Make Longer, Make Shorter, or Change Tone to...** options. Select one of these options, and click **Generate** for a new response. Add or adjust your drafted response to better guide and influence the rephrased response.
9. When you are satisfied with the generated response, click **Insert** or **Replace**. **Insert** copies the generated response into the reply compose box without changing any previous drafts you have created. **Replace** copies the generated response into the reply compose box and overwrites the current draft.
10. Press **Enter** or click the send icon.

For more information, check out our [support article](#).

Team Chat Thread Summaries



Quickly catch up on missed chat threads

Getting a lot of chat messages daily can be time consuming to read. Team Chat Thread Summary with Zoom AI Companion offers a solution to condense chat discussions and summarize messages in a thread. You'll find the Thread Summary option in the message options menu, but if you don't see the icon, contact your [admin to request to enable it](#).

Here is how to summarize a chat thread using Thread Summary.

1. Sign in to the [desktop client](#).
2. Click the Team Chat tab. ([Team Chat](#) is included with Zoom One plans.)
3. Next to the chat thread you want to summarize, click the ellipsis icon. Additional options for this chat thread will appear.
4. Click **Summarize with AI Companion**.
The chat thread summary will appear.
5. (Optional) Click **Copy** to copy the summarized content.
6. (Optional) Click **View original messages** to redirect and highlight the chat thread you summarized.
7. (Optional) Click the thumbs up or thumbs down icon to provide feedback on the summarized content.

For more information, check out our [support article](#).

often struggle with managing their tasks and deadlines effectively. It's a common problem for many professionals. So, we've come up with an idea to introduce a task management system to create and organize tasks based on user experience.

Summarize with AI Companion

seamless and intuitive for individuals or teams. They can offer reminders and notifications to streamline task management.

The discussion is about a proposed task management feature. Nabil Rashad introduces the idea, aiming to improve user experience. Karen Anderson and Ada Nguyen show interest in functionality and integration. Nabil Rashad highlights the system's seamless task management features, such as smooth integration and cross-platform access.

[View original messages](#)

Copy

Whiteboard Content Generation



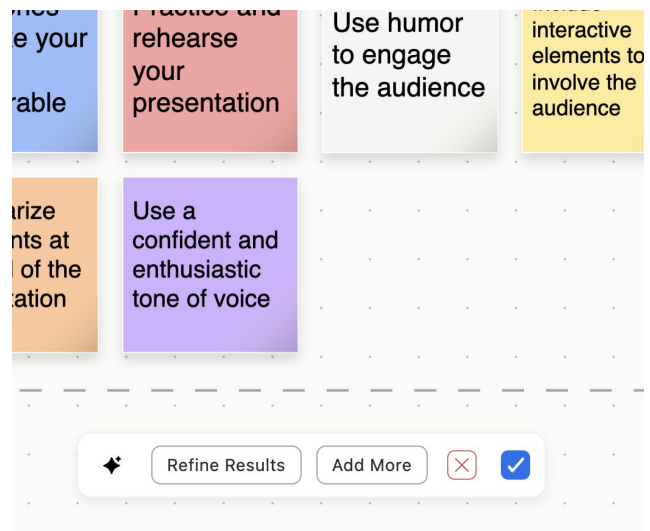
Kickstart brainstorm in Whiteboard

With Whiteboard Content Generation, users can generate ideas, refine and extend existing content, and add objects to a canvas with just one click.

Here is how to generate content using Whiteboard Content Generation. (Whiteboard Basic and Whiteboard come with select [Zoom One plans](#). [Learn more](#) about Whiteboard.)

1. [Create](#) or [open](#) an existing whiteboard.
2. In the left toolbar, click the AI Companion icon. The Whiteboard Content Generation prompt will appear.
3. Enter a command in the prompt field or select from the list of suggested ideas.
4. Right next to the prompt field, expand the drop-down list and select **Generate Stickies**, **Generate Table**, or another desired content type.
5. Click the send icon.
6. Your generated content will appear.
7. (Optional) Click **Refine Results** to narrow down your search criteria, apply filters, and obtain more precise and relevant information. You can enter a more detailed command into the prompt field or select from the list of suggested ideas.
8. (Optional) Click **Add More** to add more relevant content.
9. (Optional) Click the close icon to cancel the generation.
10. When you are satisfied with the generated content, click the checkmark icon.

For more information, check out our [support article](#).



Additional Resources



Learning Center

Join us for free on-demand courses and short videos so you can Zoom like a pro. [Start Learning](#)

Community

A place to find solutions, ask questions and collaborate with other Zoom users. [Start collaborating](#)