Zoom Phone User Training

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Agenda

Using Zoom Phone

Logging in to the Zoom Desktop App, Navigating Zoom App (Desktop and Mobile)

Voicemail

Playing voicemail messages & viewing transcription

Zoom Web Portal

Logging in, Setting up Zoom Phone and Zoom Phone Settings

Resources and Support

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Using Zoom Phone

Zoom Desktop Client

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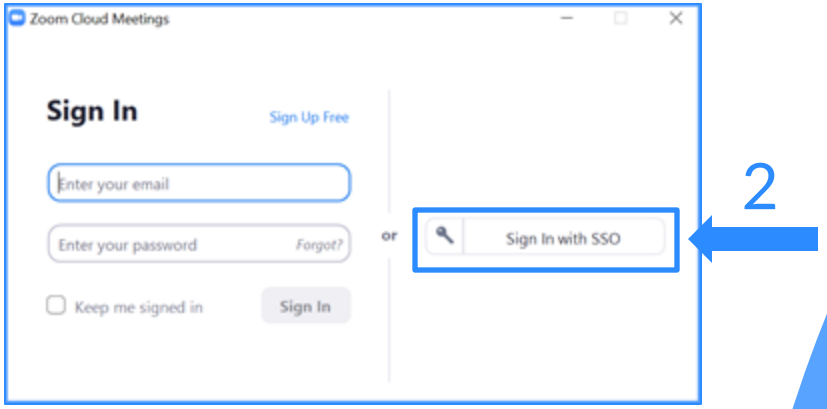
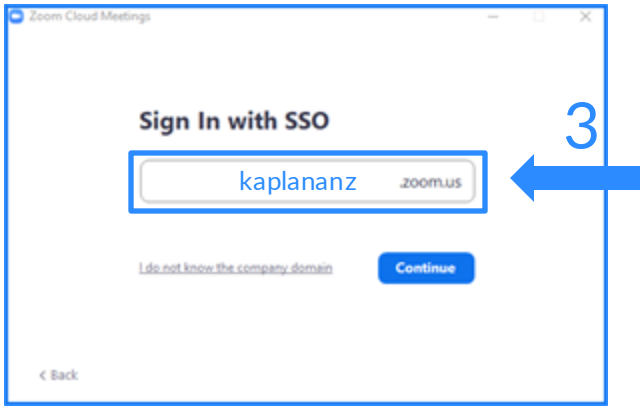
Zoom Desktop Application

Logging In





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Zoom Desktop Application

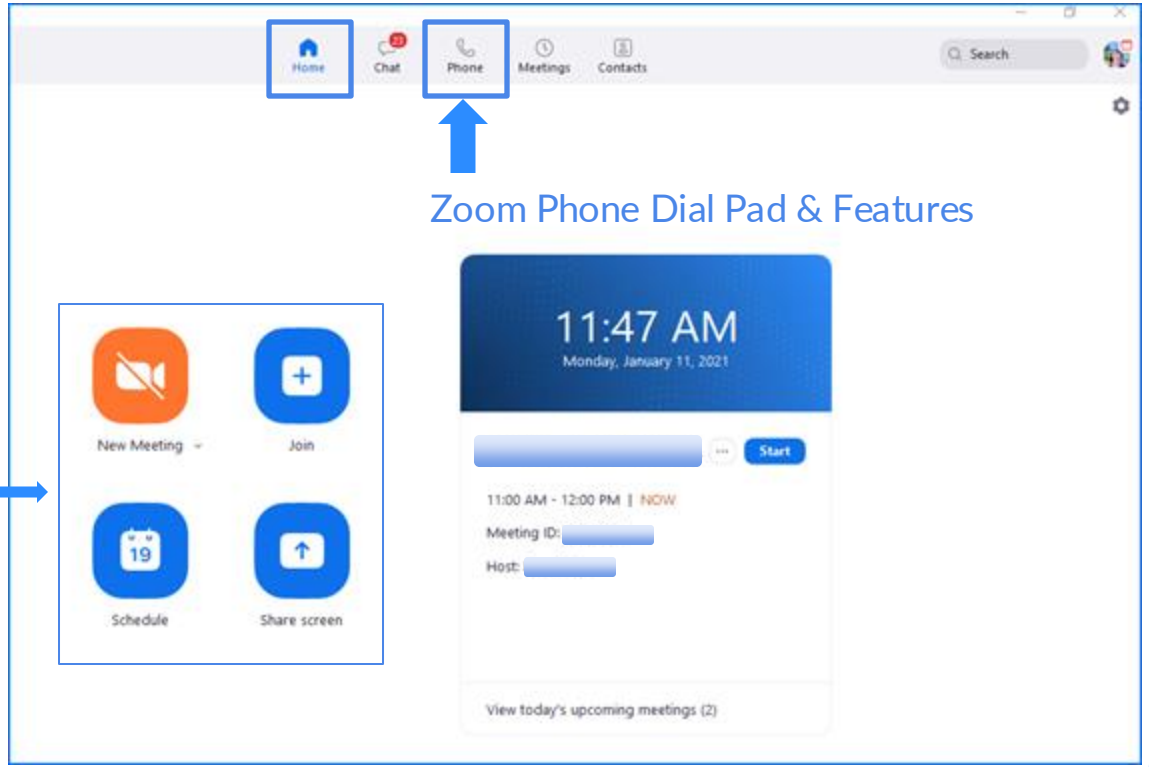
Home Screen

New Meeting:
Starts an instant video meeting

Join Meeting:
Enter the Zoom meeting ID to join a meeting

Schedule:
Schedule a Zoom meeting from the desktop application

Share Screen
Initiates screen share within a Zoom Room



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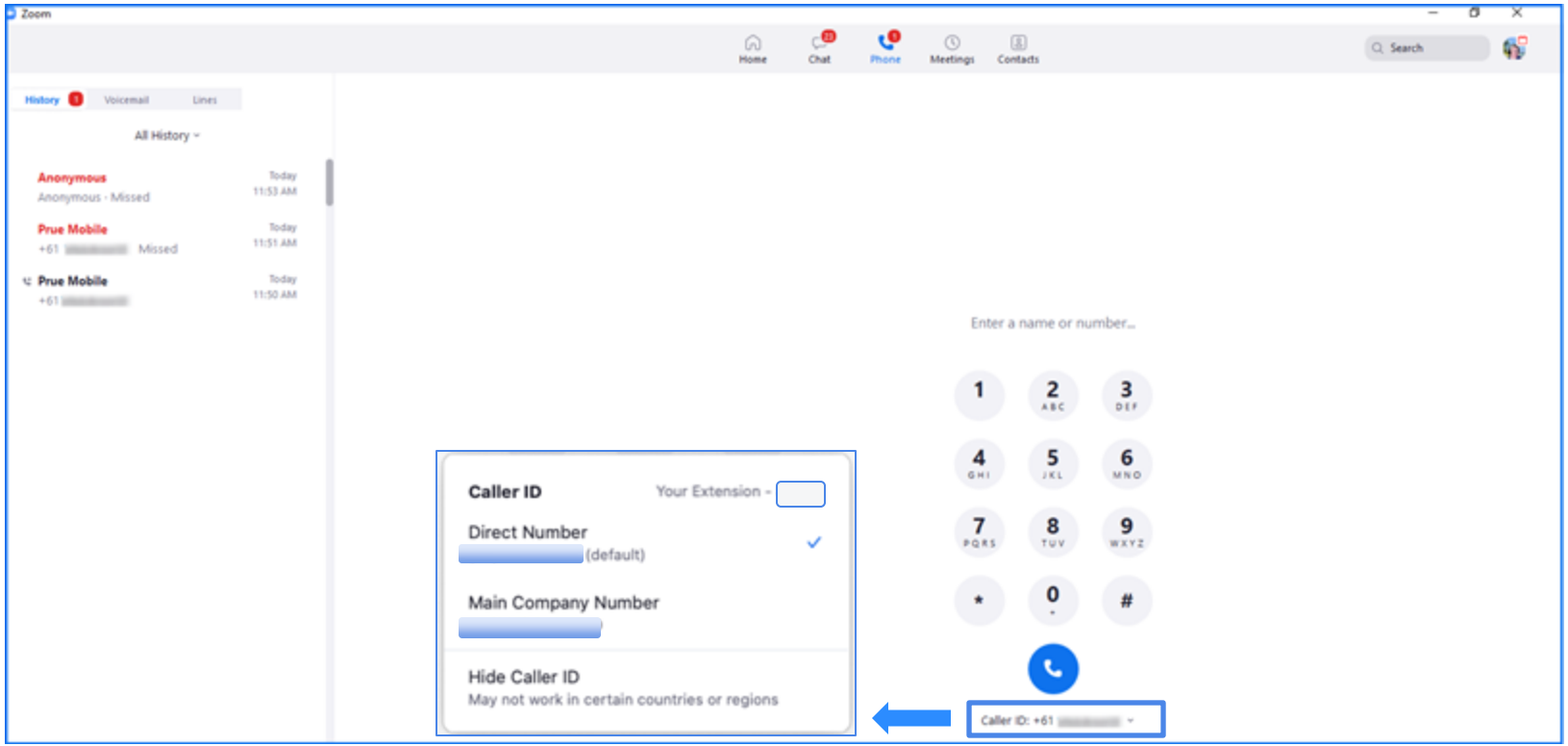
Zoom Desktop Application

Zoom Phone (Dial Pad)



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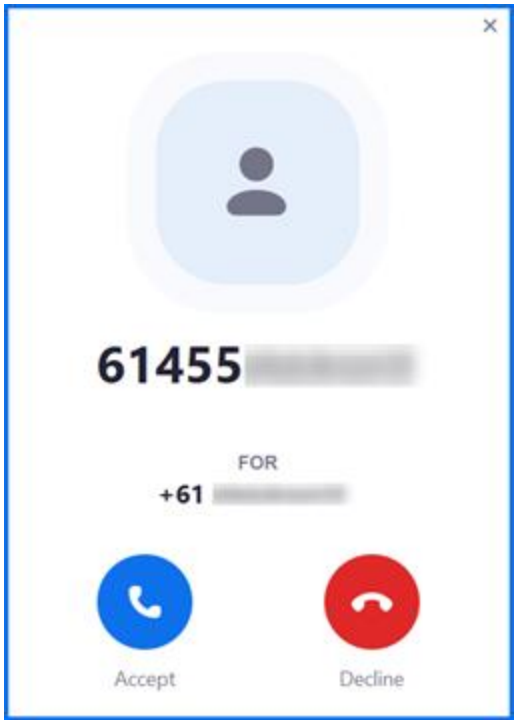
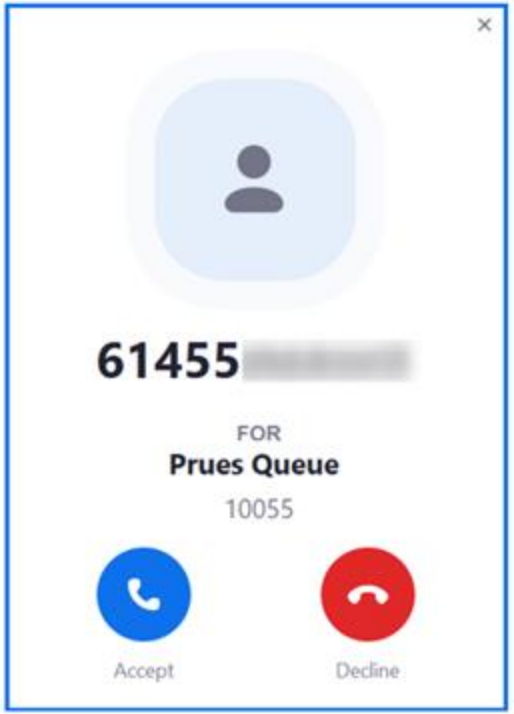
Zoom Desktop Application

Zoom Phone (Inbound calls)

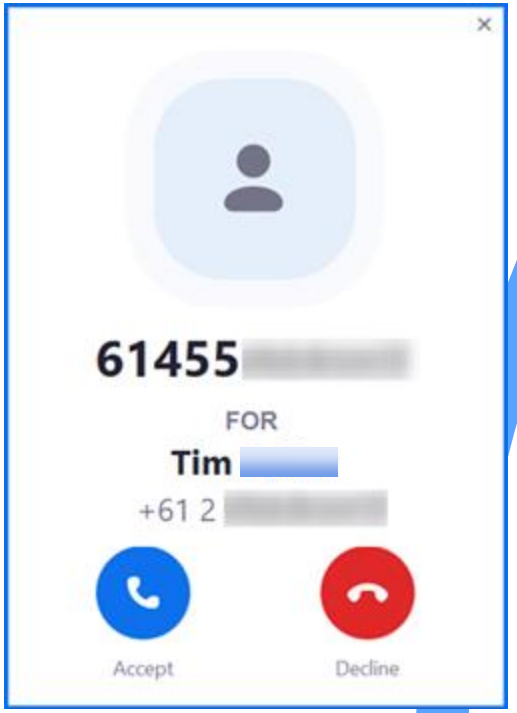
Direct calls



Call Queue calls



Delegate calls



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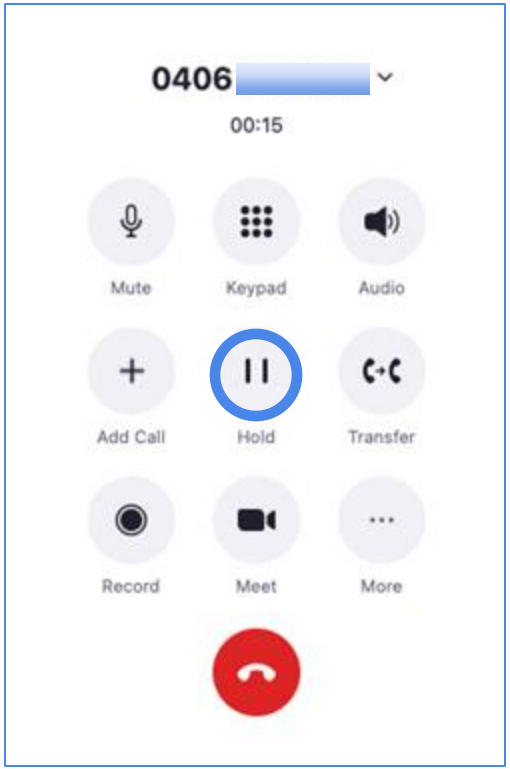
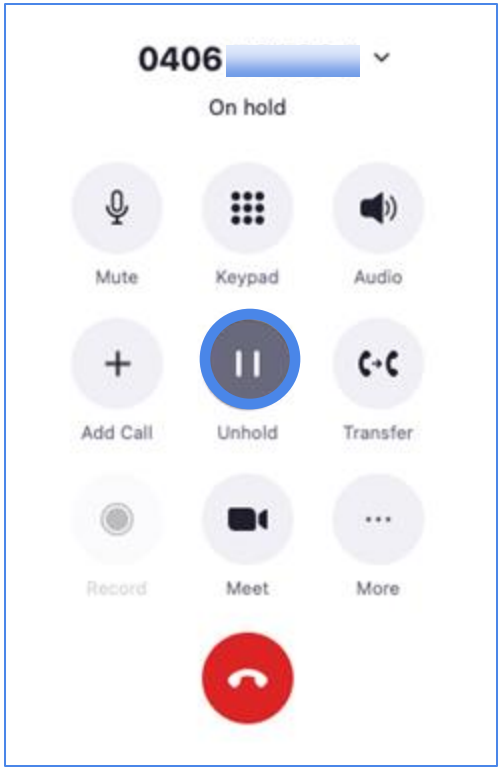
Zoom Desktop Application

Zoom Phone (Hold/Unhold)





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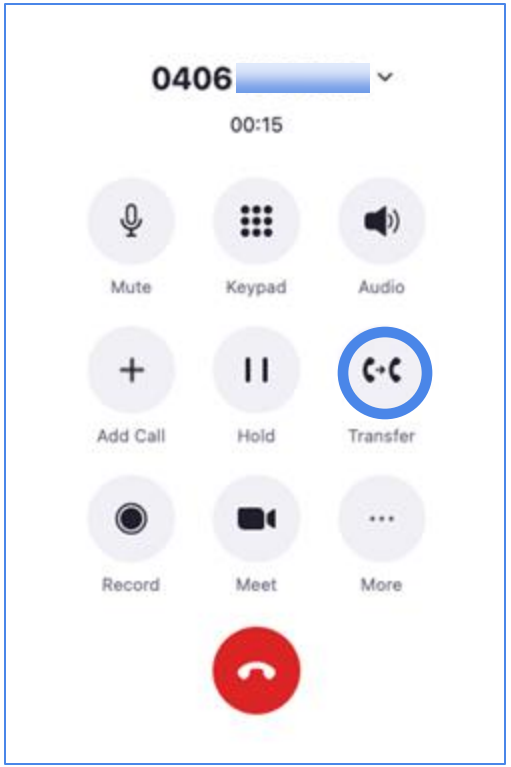
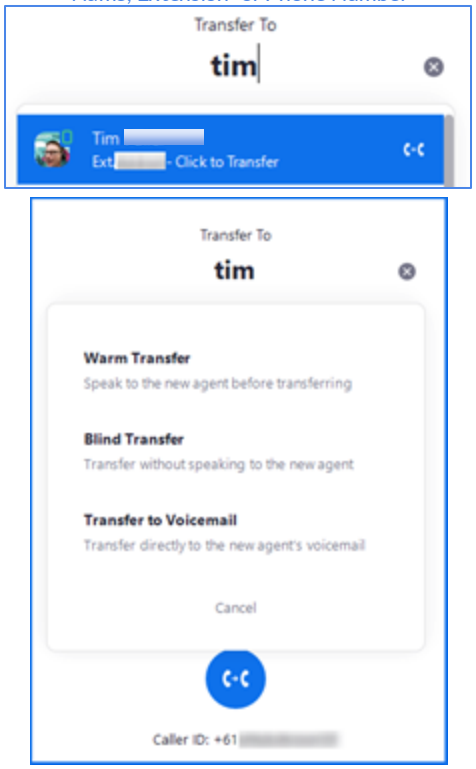
Zoom Desktop Application

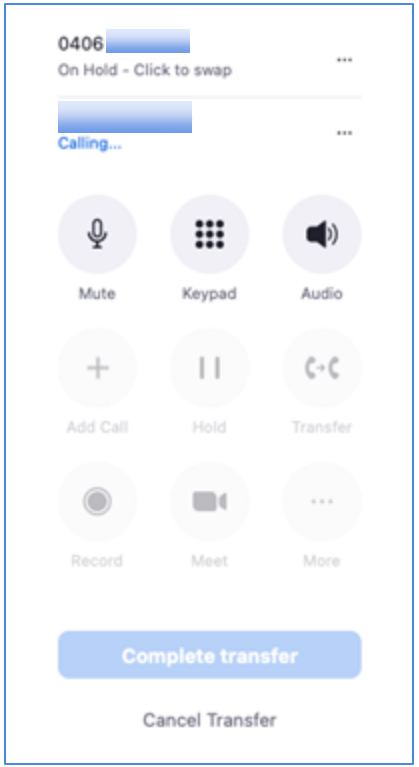
Zoom Phone (Transfer)



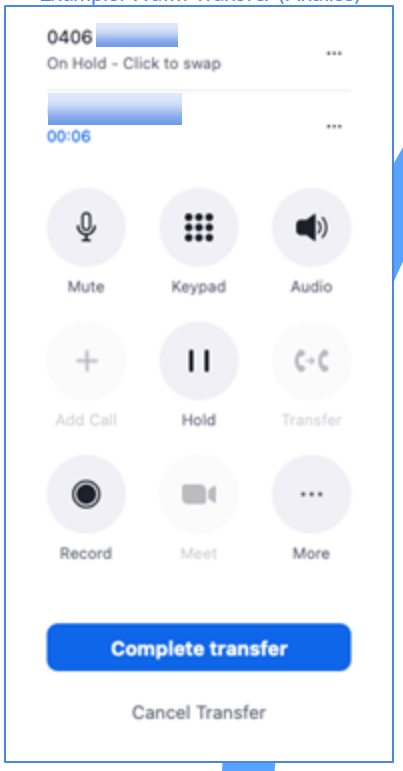
Name, Extension or Phone Number



Example: Warm Transfer (Calling)



Example: Warm Transfer (Finalise)



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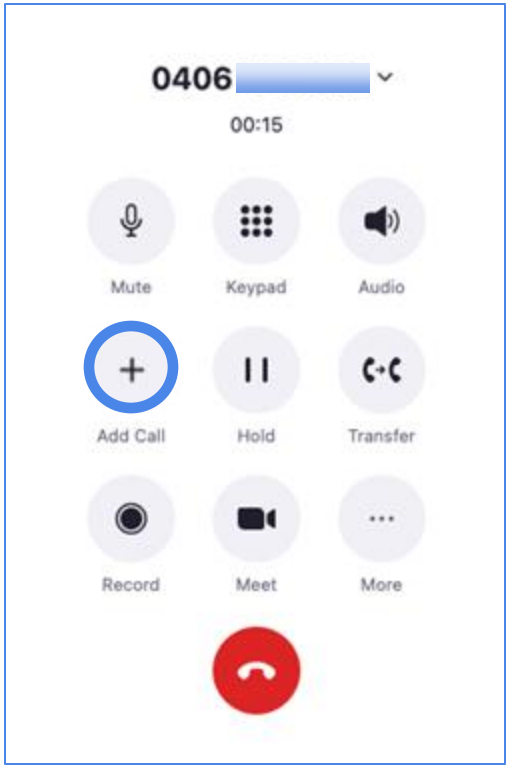
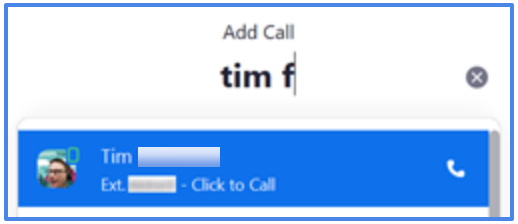
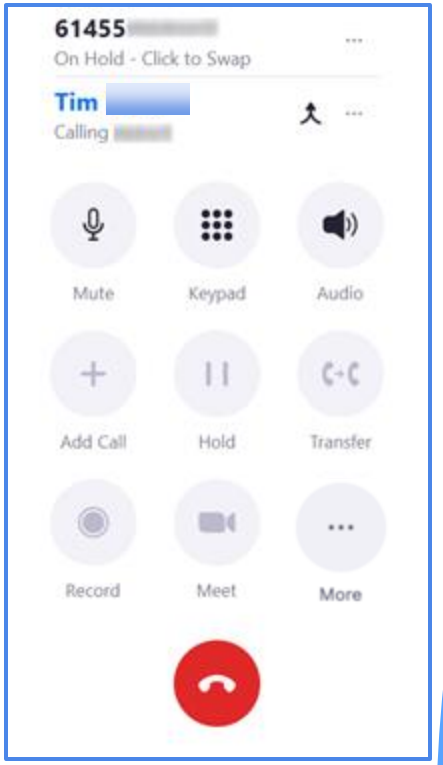
Zoom Desktop Application

Zoom Phone (Add Call | Conference)





Name, Extension or Phone Number



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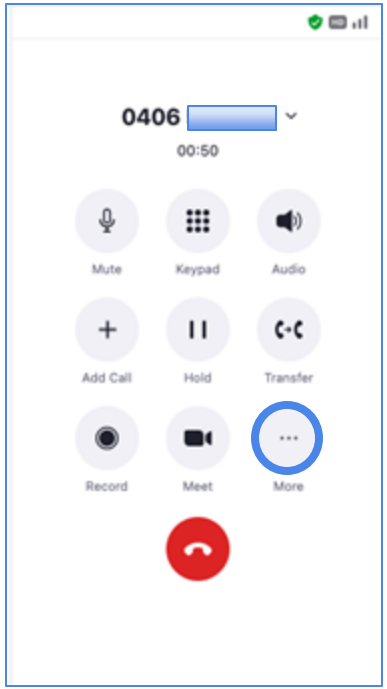
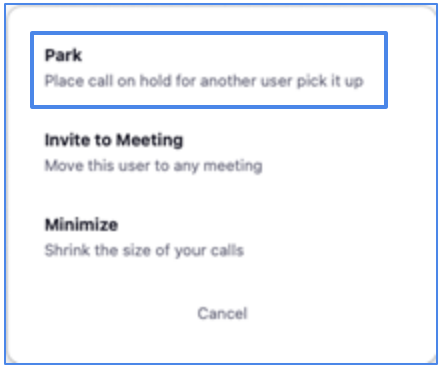
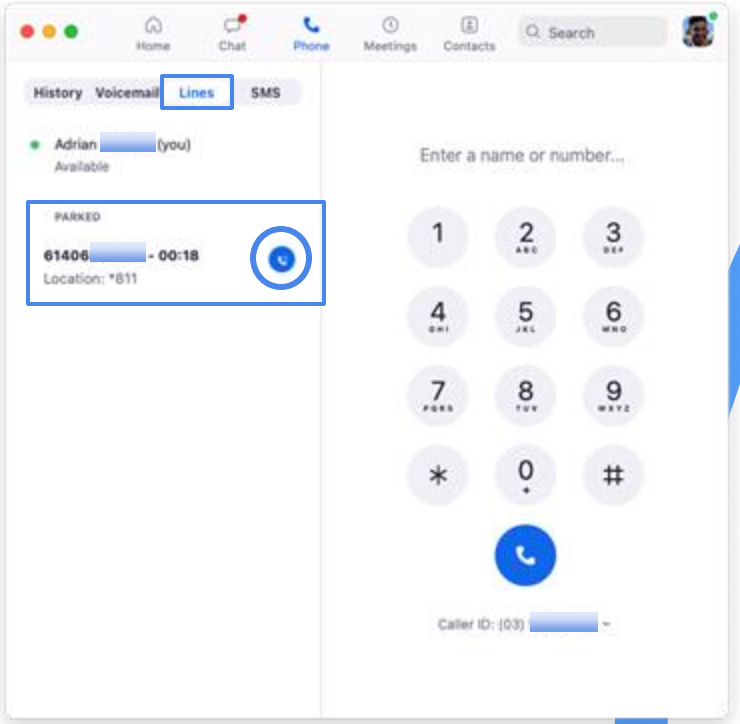
Zoom Desktop Application

Zoom Phone (In-Call ‘More’ options)







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Zoom Desktop Application

Presence Status Icons

Icon	Status	Description
	Offline	Contact is not signed in to the Zoom desktop client or mobile app
	Online (desktop)	Contact is signed in to the Zoom desktop client **Note**: If the contact is also signed in to the Zoom mobile app, this status overrides the mobile client status
	Online (mobile)	Contact is signed in to the Zoom mobile client only **Note**: If the contact is also signed in to the Zoom desktop client, the desktop client status overrides this status
	Away	Contact is sign in to the Zoom desktop client but their computer is inactive or they manually set their status to **Away**

Icon	Status	Description
	Do not disturb	Contact manually set their status to **Do not disturb** and won't receive pop-up notifications for chat or Zoom Phone calls in the Zoom desktop client or mobile app
	In a Zoom meeting	Contact has started or joined a Zoom meeting using the Zoom desktop client or mobile app
	Presenting	Contact is sharing their screen while in a Zoom meeting
	On a call	Contact is on a Zoom Phone call using the Zoom desktop client or mobile app
	In a calendar event	Contact is in a calendar event (from a synced calendar) but hasn't joined a Zoom meeting using the desktop client or mobile app

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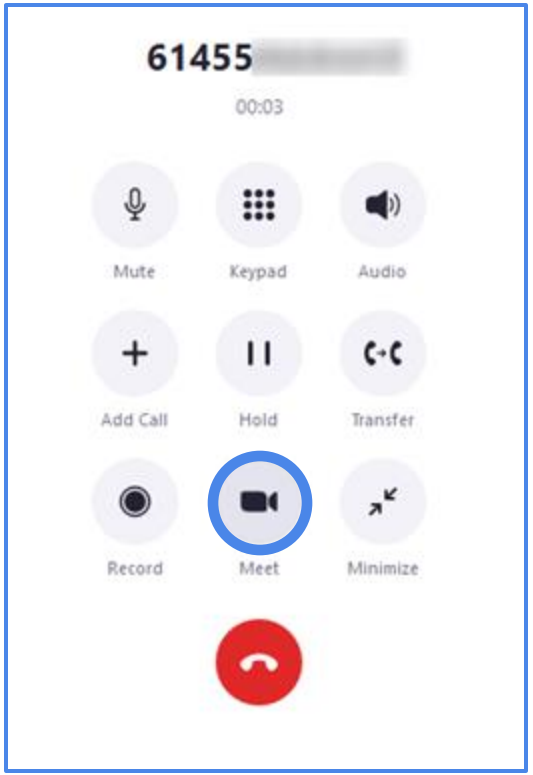
Zoom Desktop Application

Zoom Phone (Elevate to Zoom Meeting)



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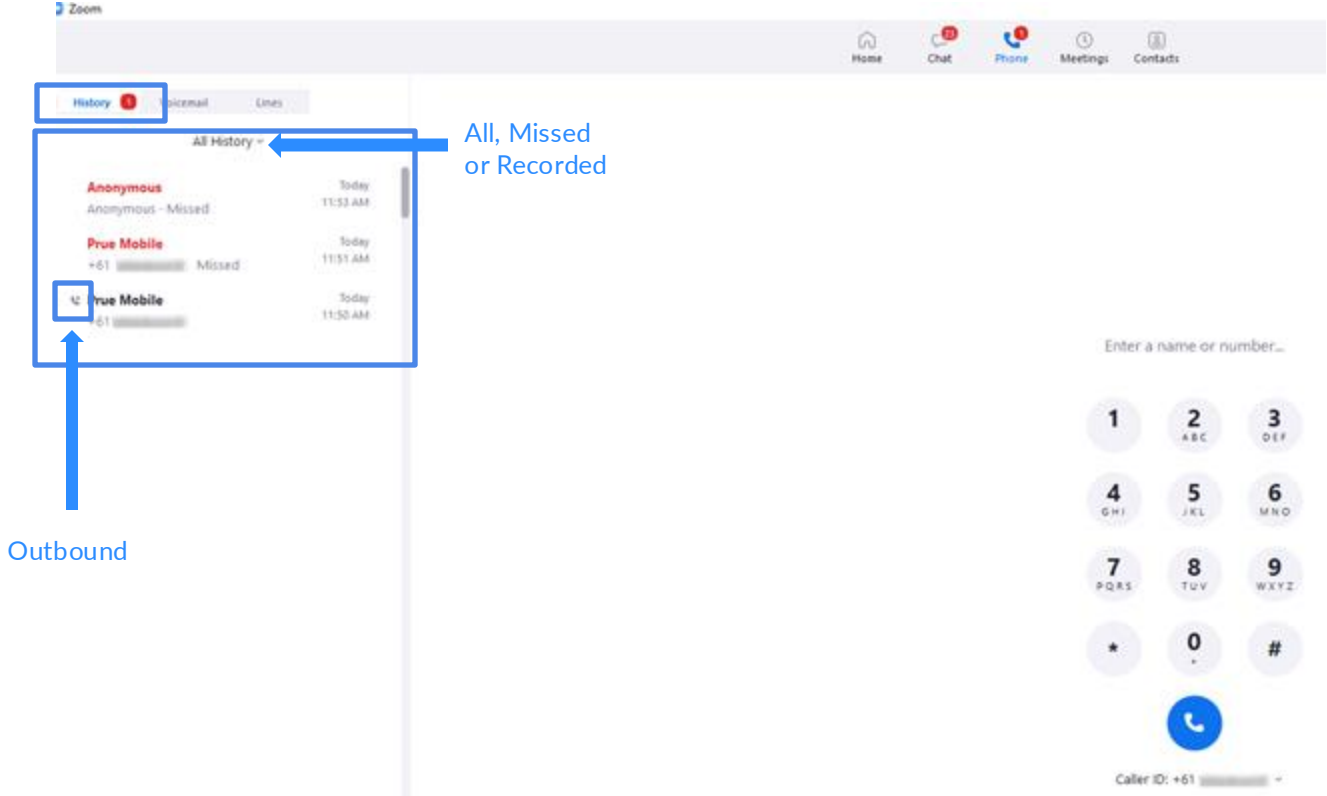
Zoom Desktop Application

Zoom Phone (Call History)



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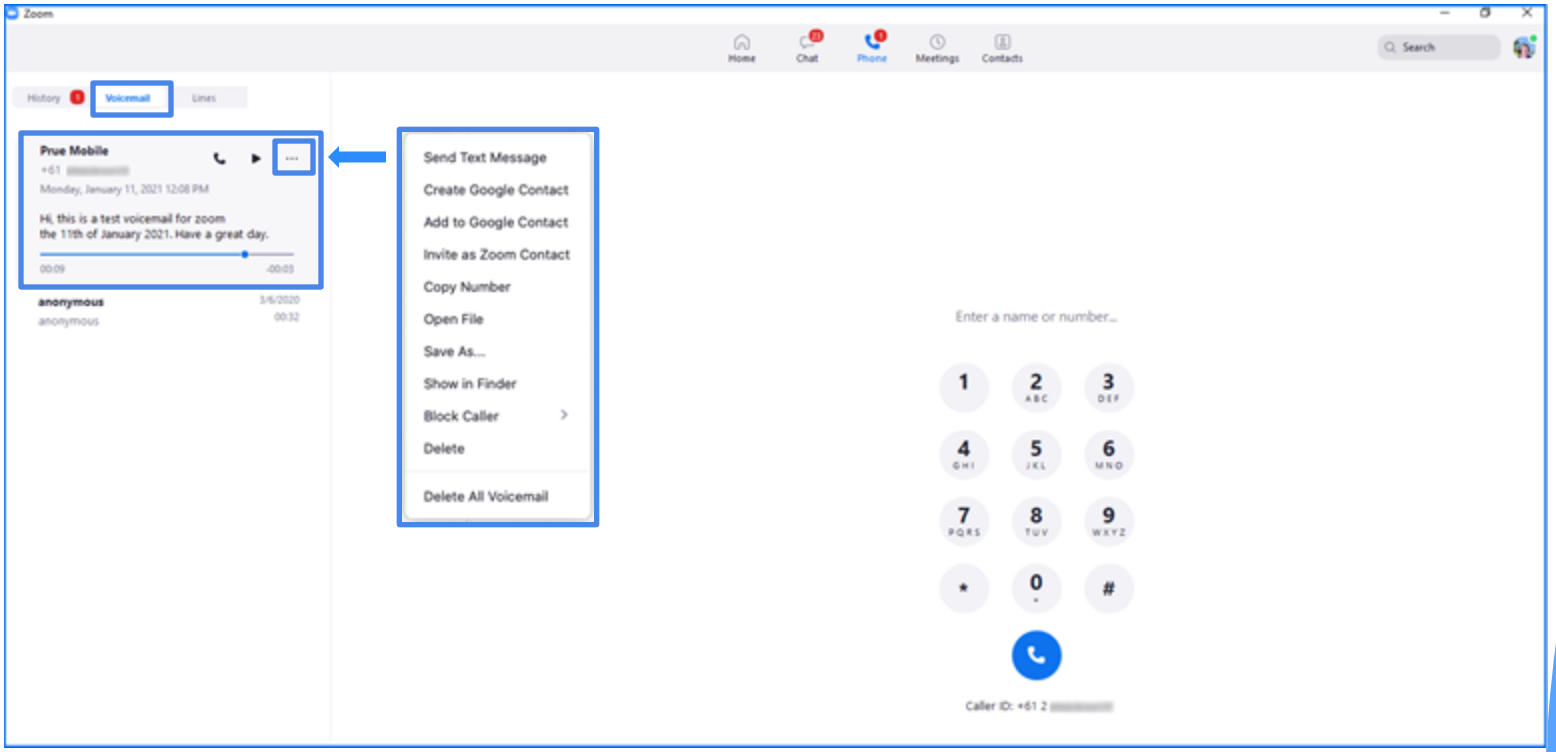
Zoom Desktop Application

Zoom Phone (Voicemail)



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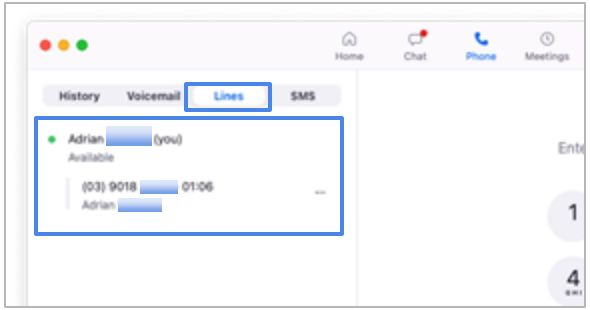
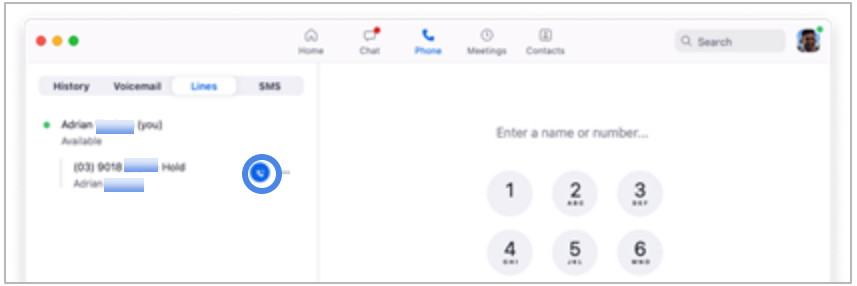
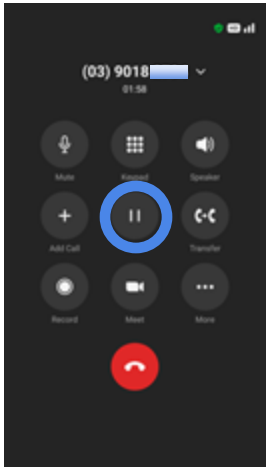
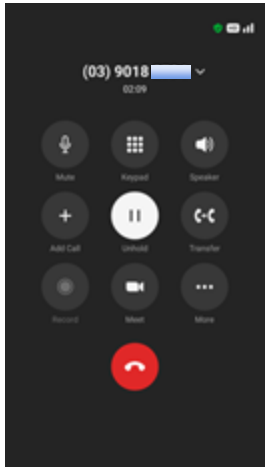
Zoom Desktop Application

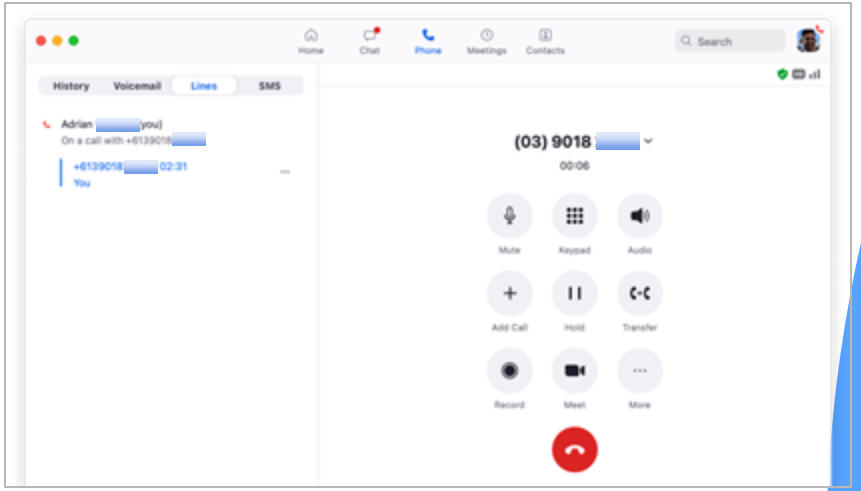
Zoom Phone (Lines) | Moving call Mobile <> Desktop











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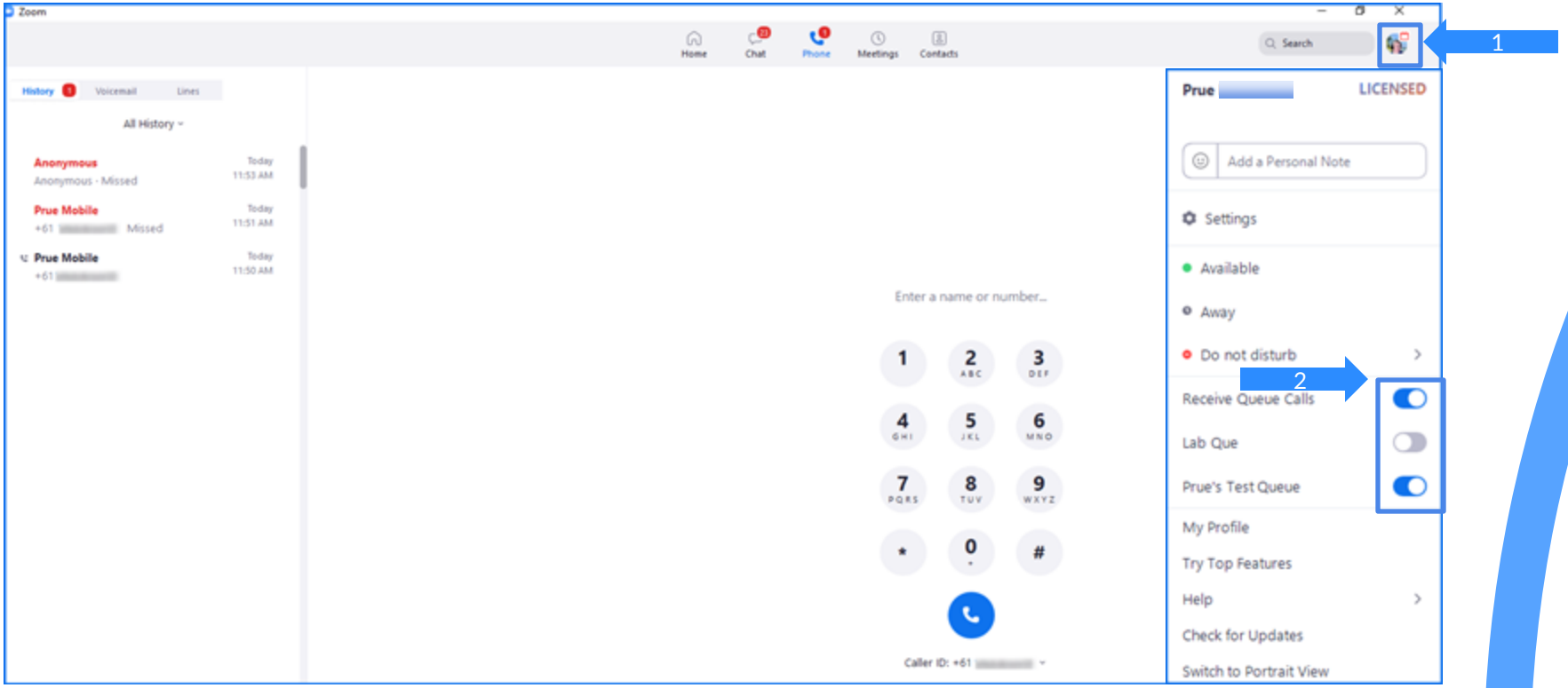
Zoom Desktop Application

Zoom Phone (Receiving Call Queue Calls)



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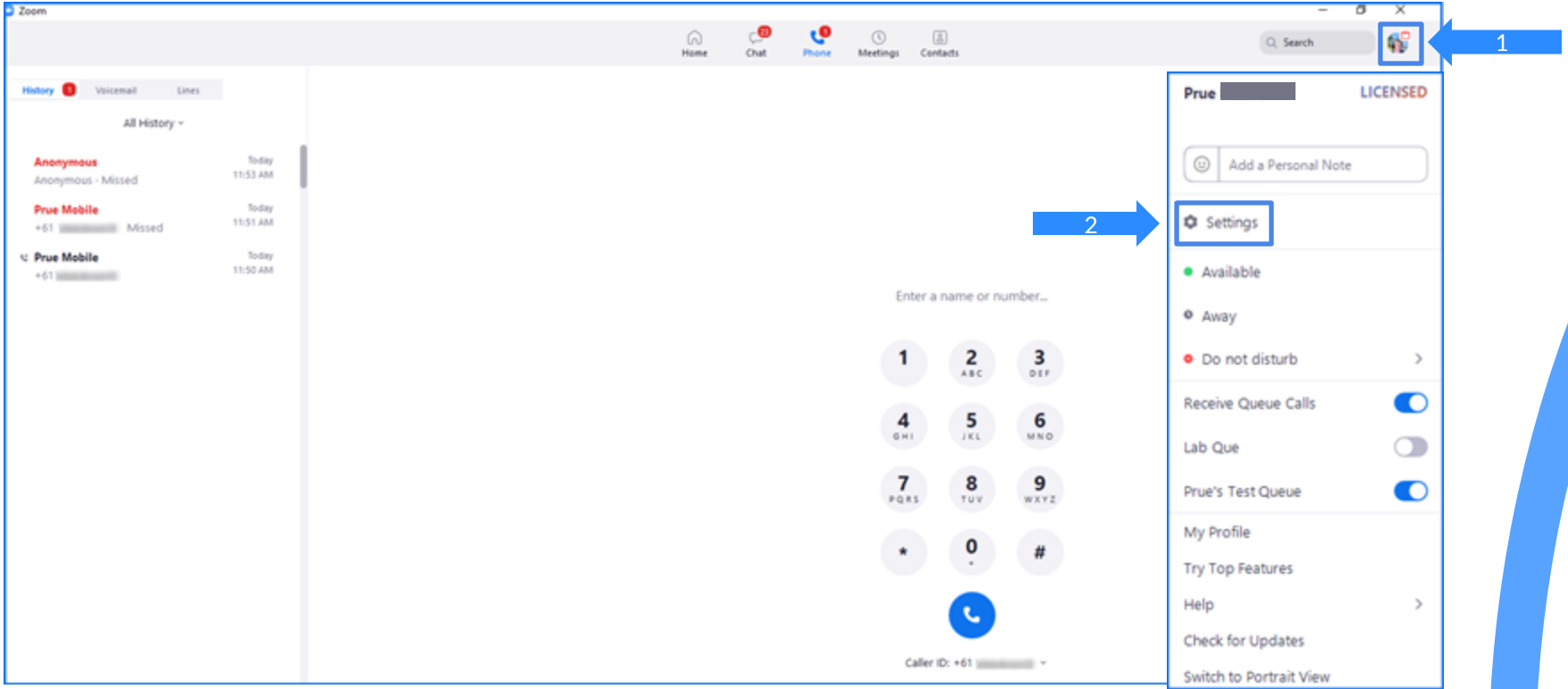
Zoom Desktop Application

Zoom Phone (Accessing Settings)



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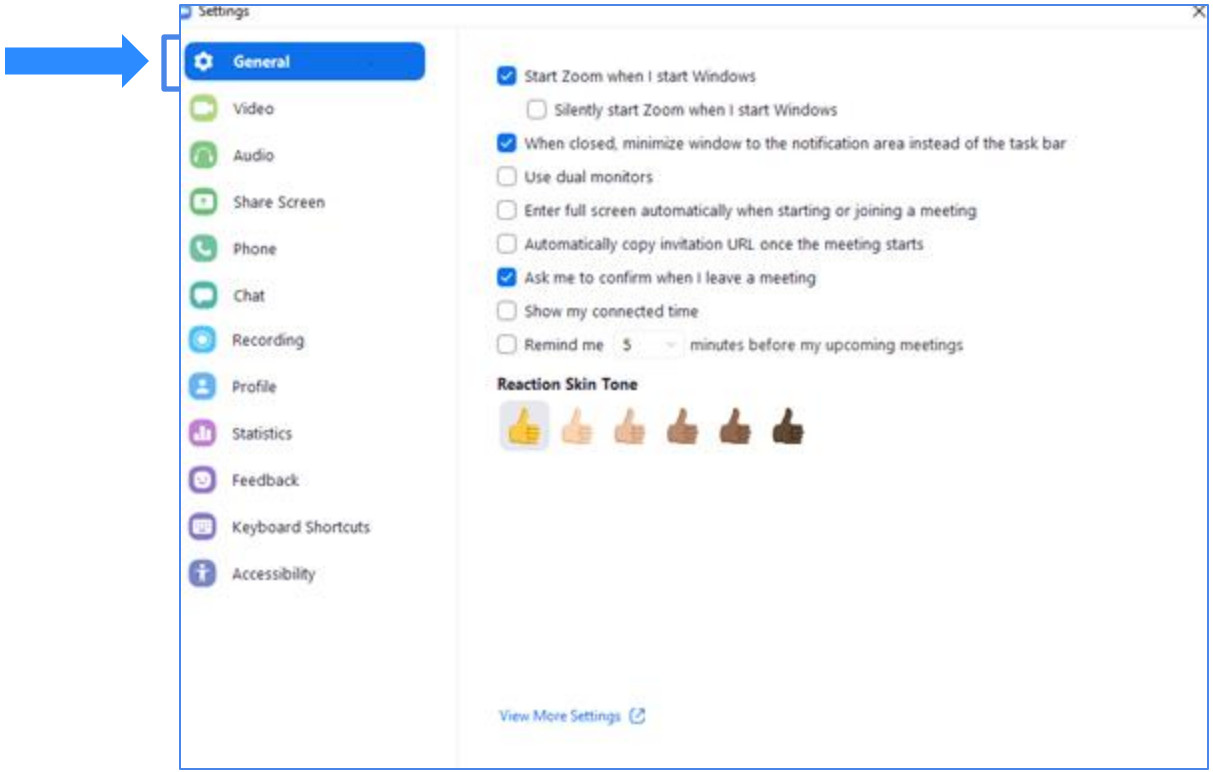
Zoom Desktop Application

Zoom Phone (Settings: General)



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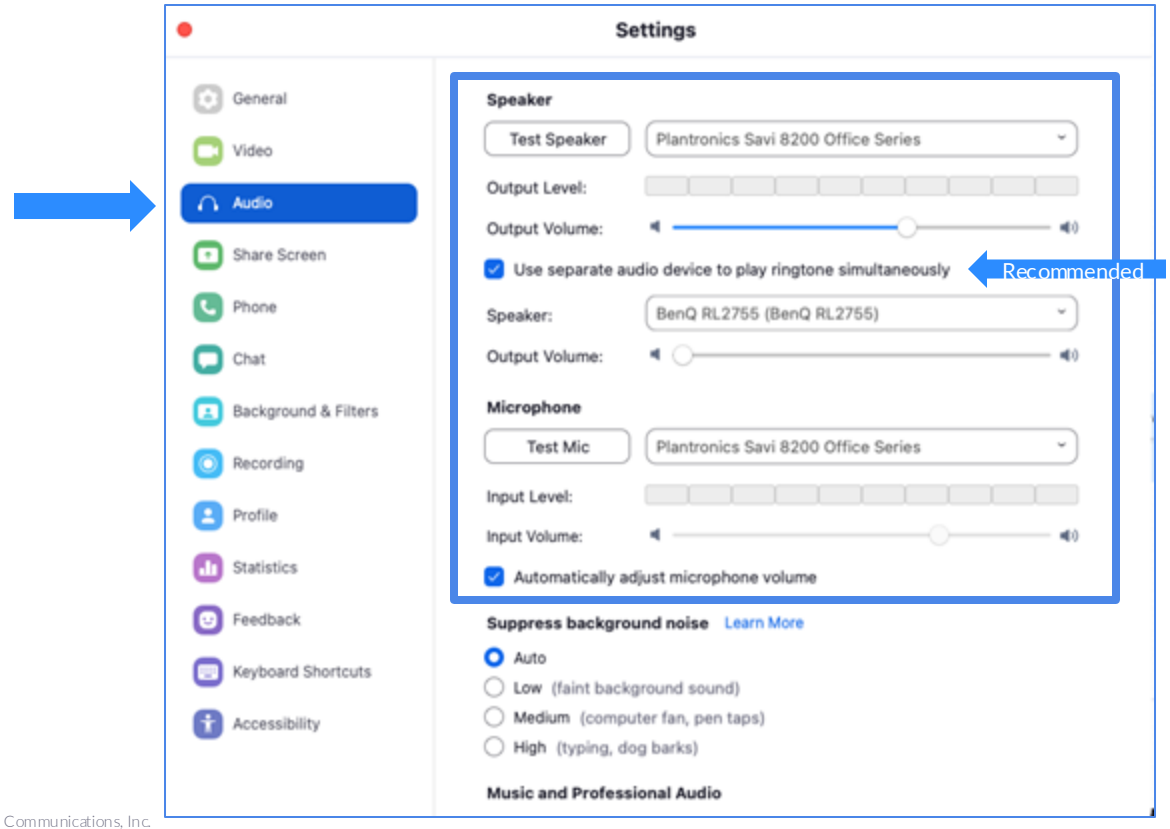
Zoom Desktop Application

Zoom Phone (Settings: Audio)



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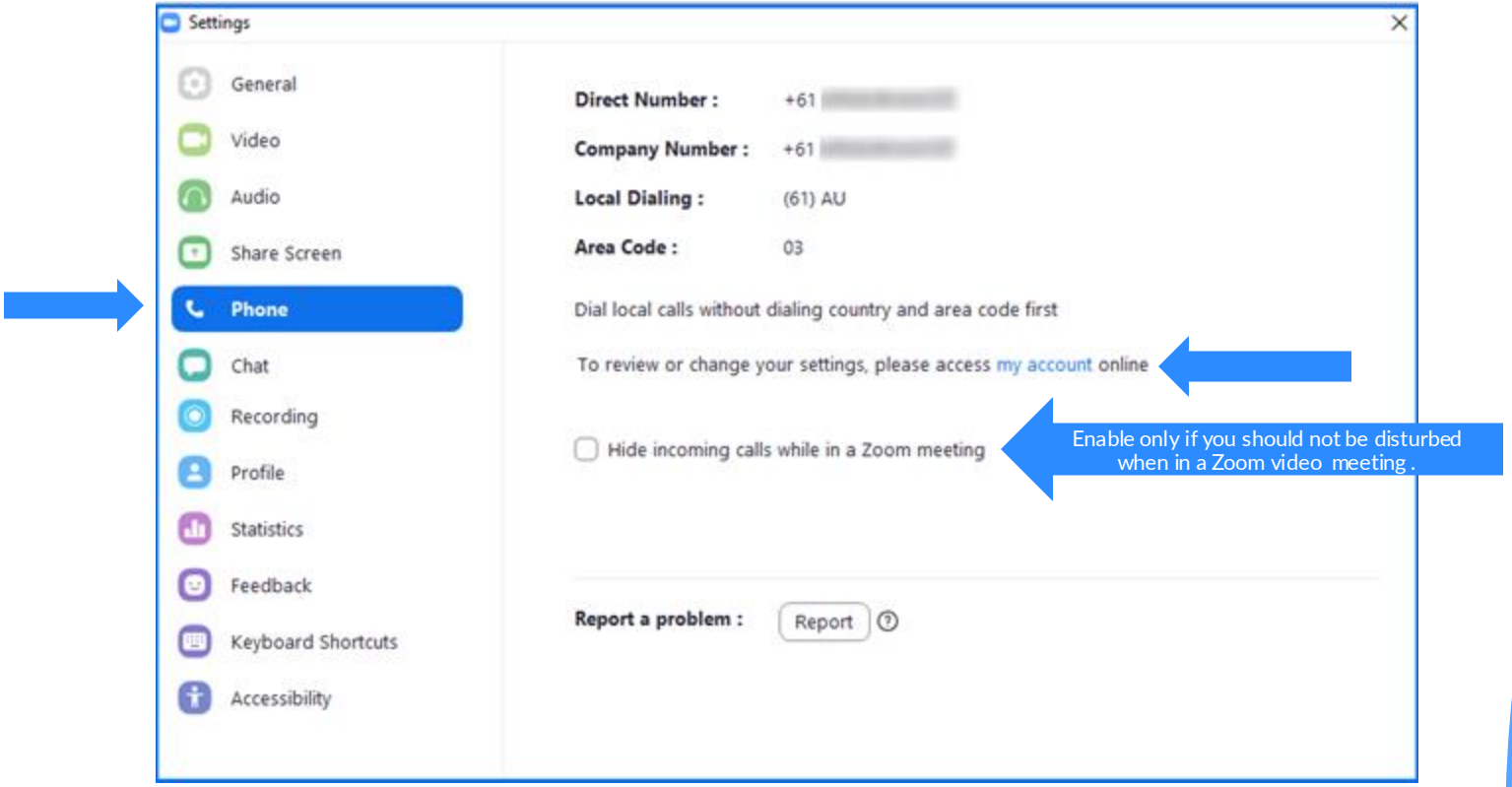
Zoom Desktop Application

Zoom Phone (Settings: Phone)



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Zoom Web Portal

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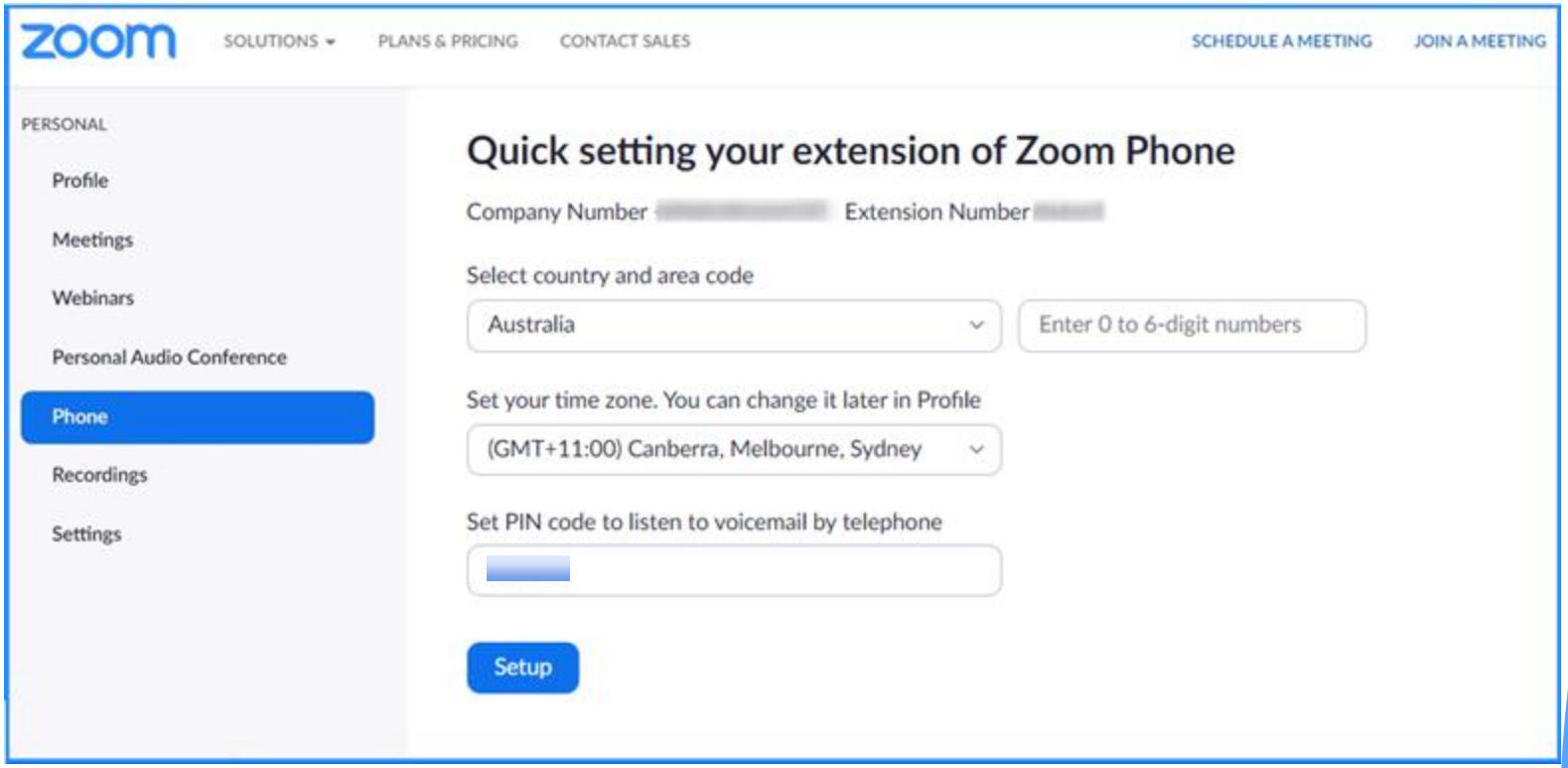
Zoom Web Portal

Phone (Initial Setup)



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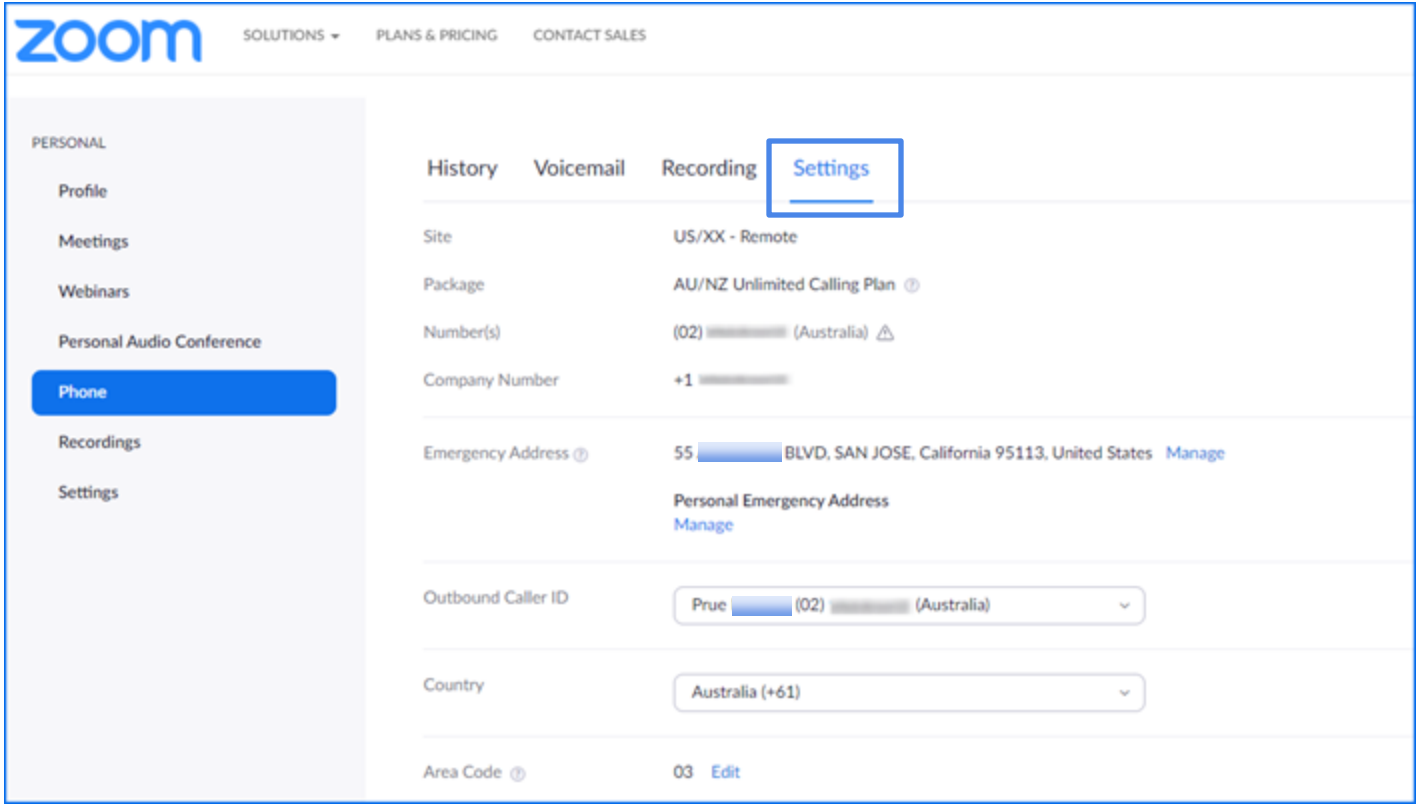
Zoom Web Portal

Phone (Settings)



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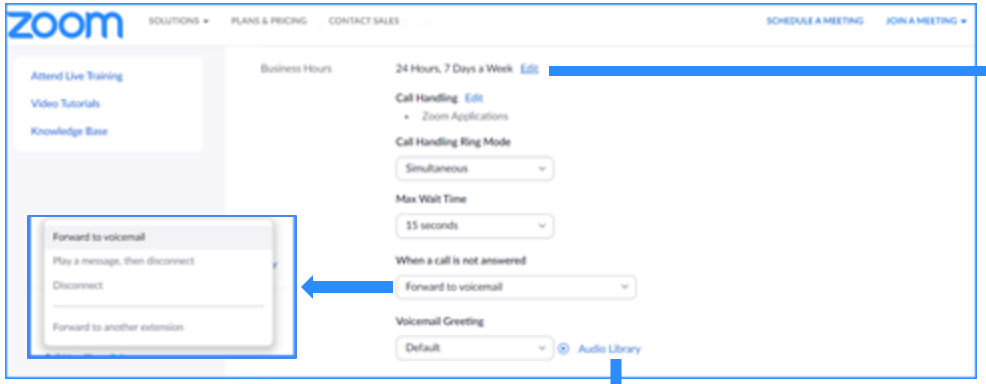
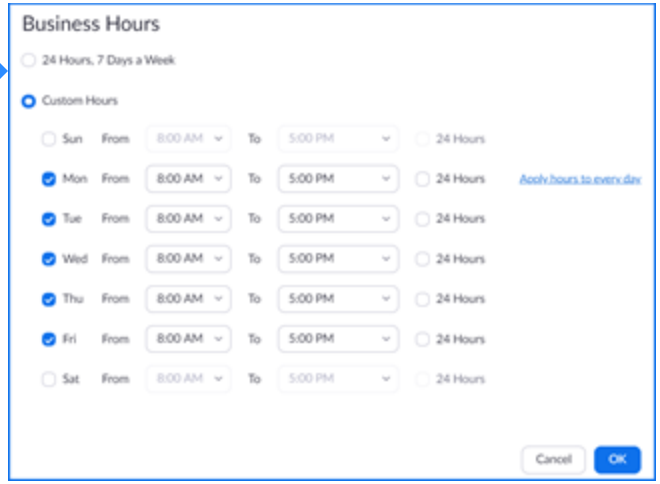
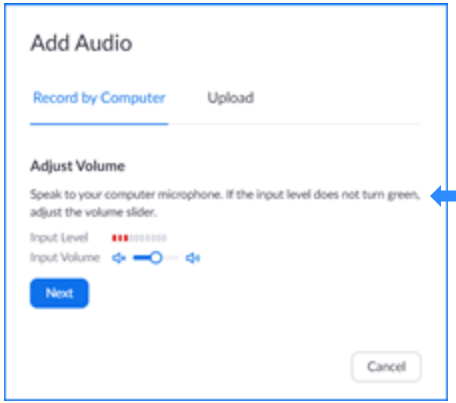
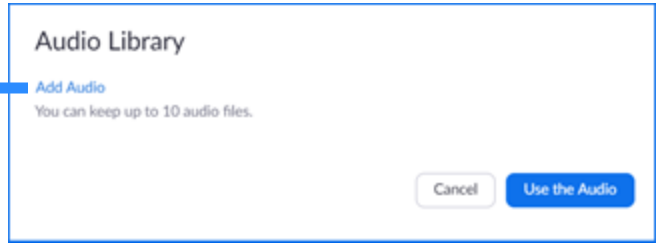
Zoom Web Portal

Phone (Settings)









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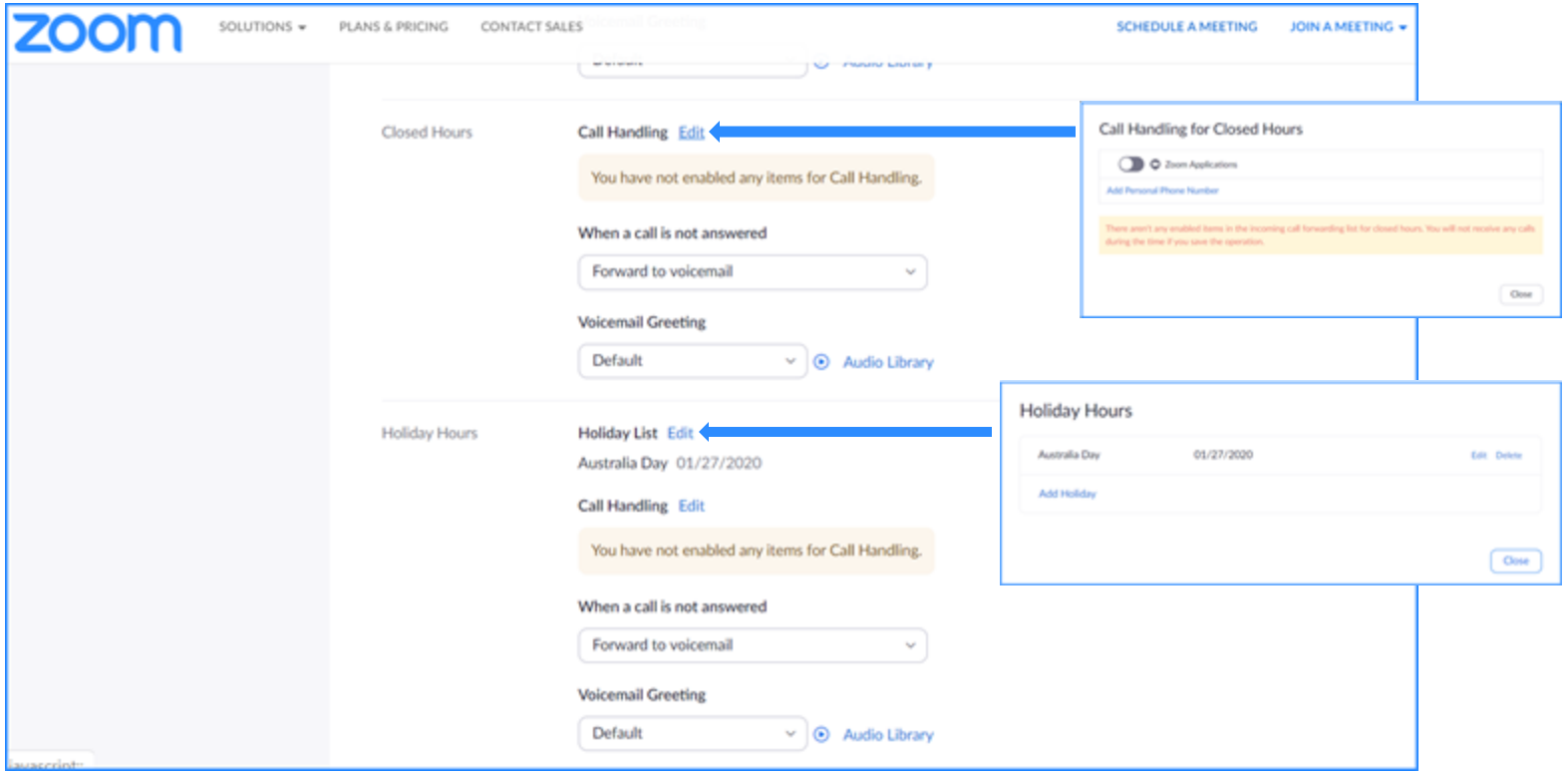
Zoom Web Portal

Phone (Settings)



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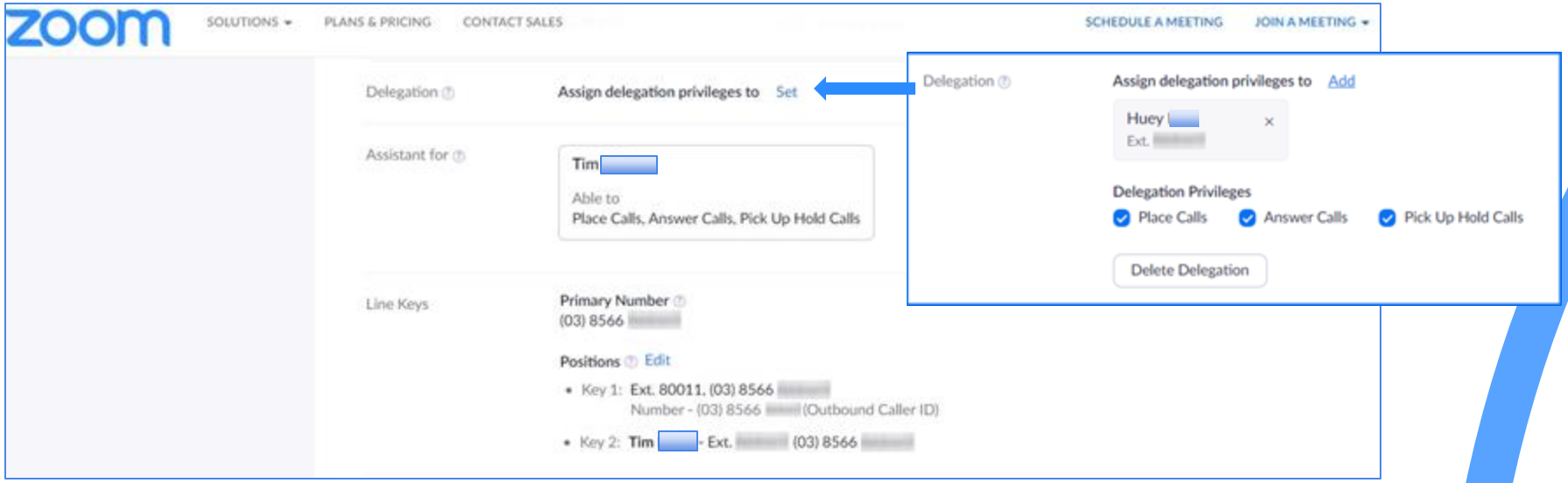
Zoom Web Portal

Phone (Settings)



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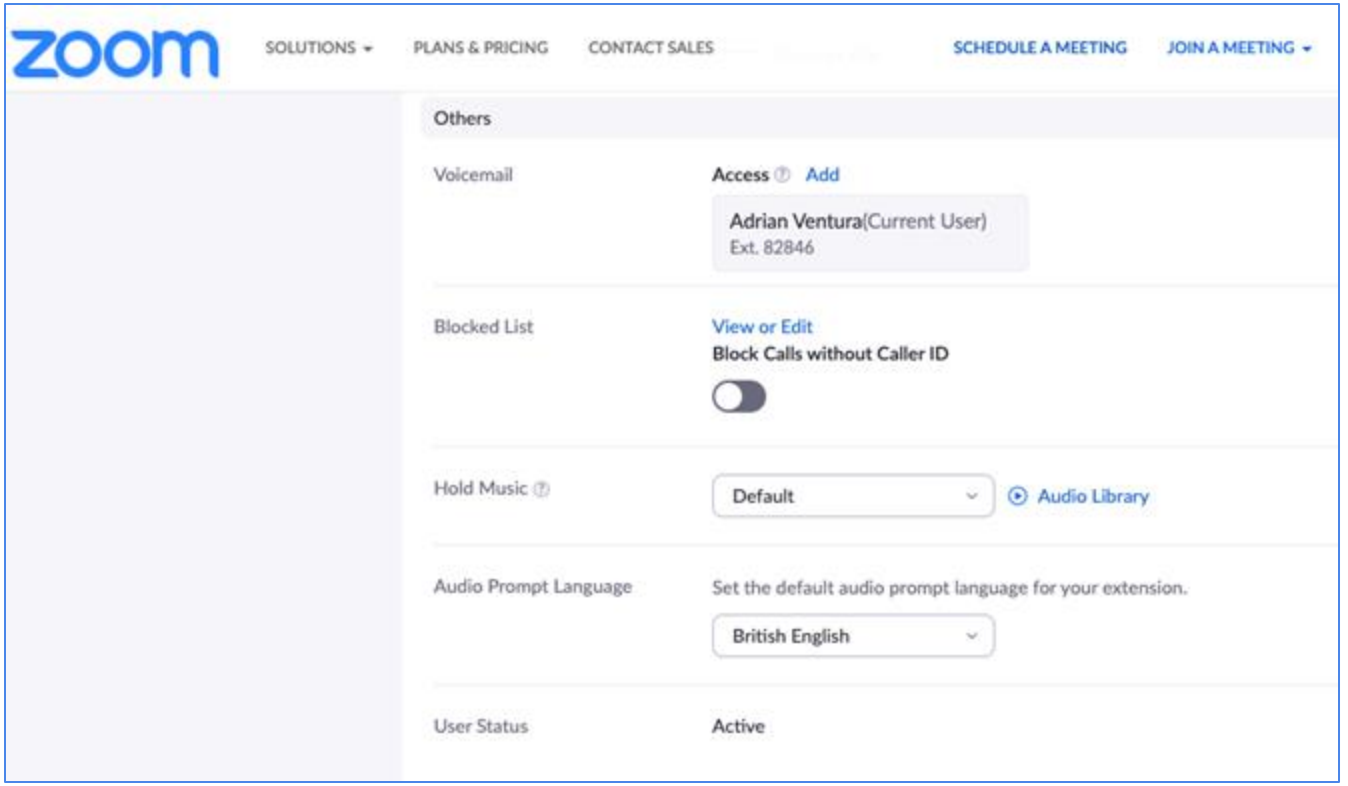
Zoom Web Portal

Phone (Settings)



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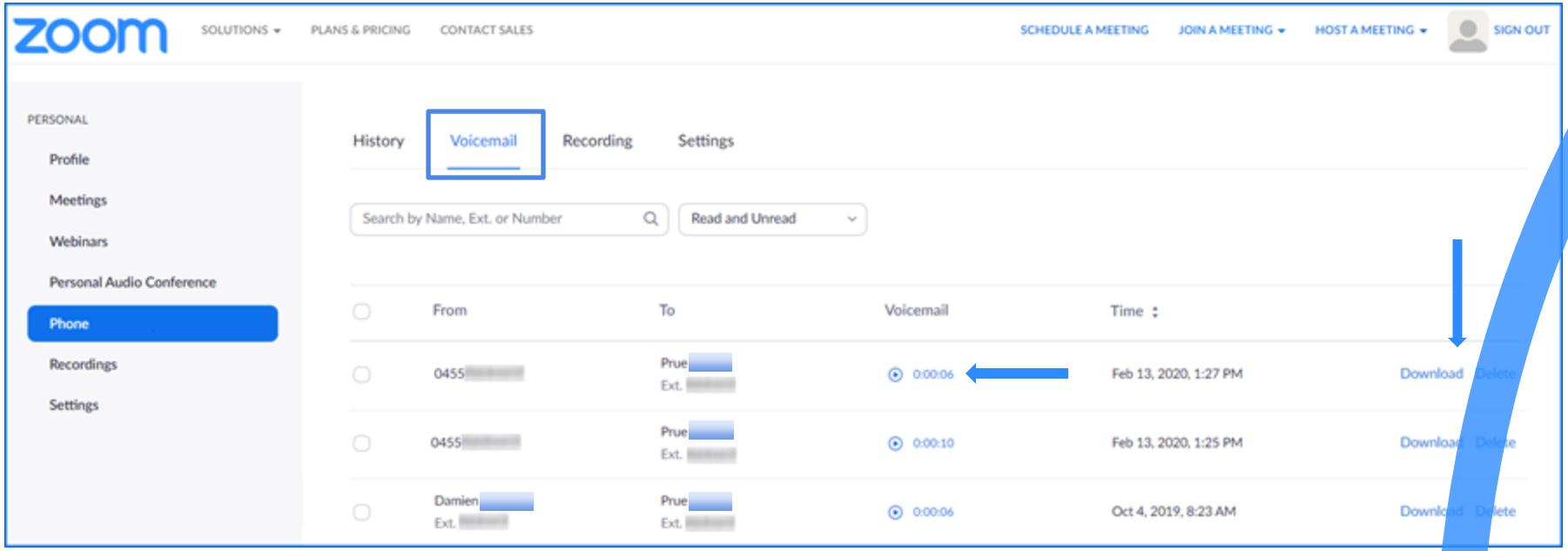
Zoom Web Portal

Phone (Voicemail)



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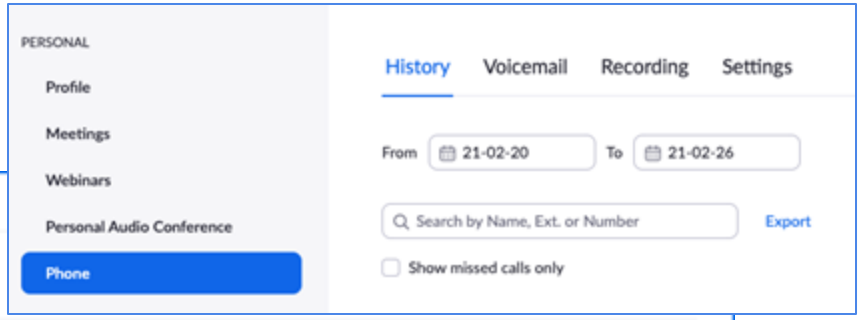
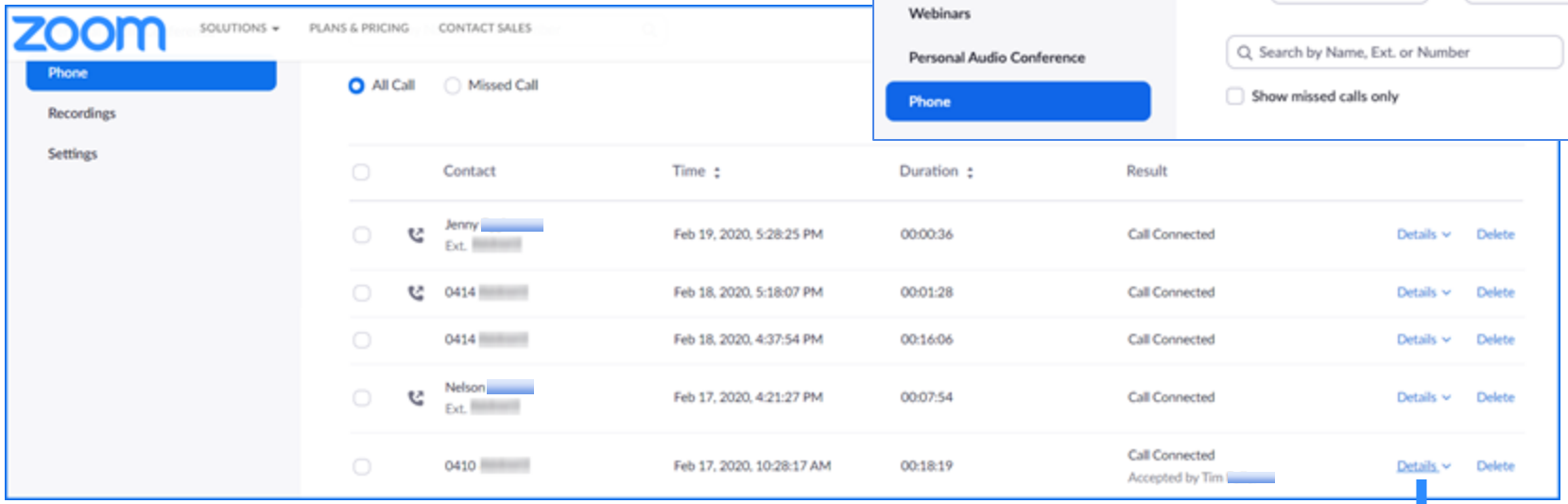
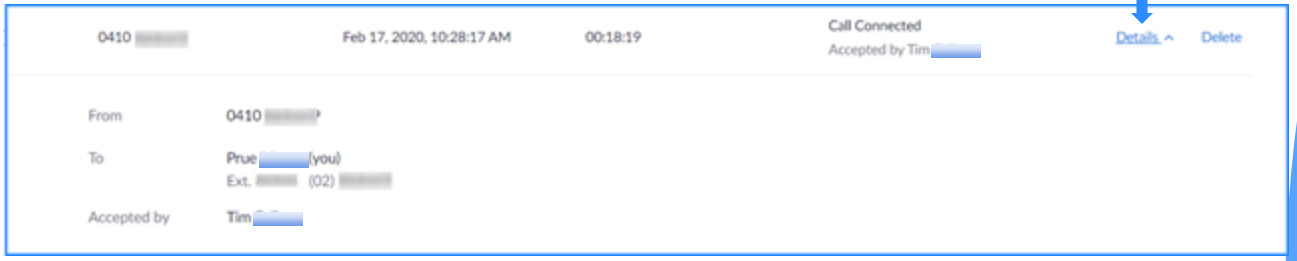
Zoom Web Portal

Phone (Call History)







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Using Zoom Phone

Zoom Mobile App

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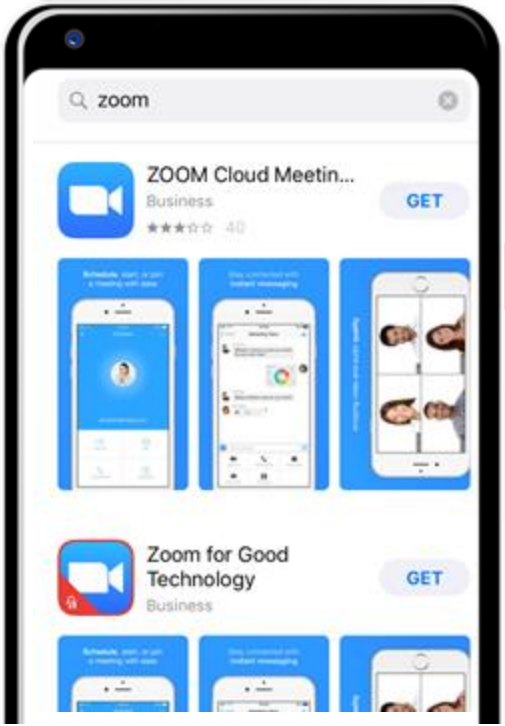
Zoom Mobile App

Download

iOS → App Store



Android → Google Play Store

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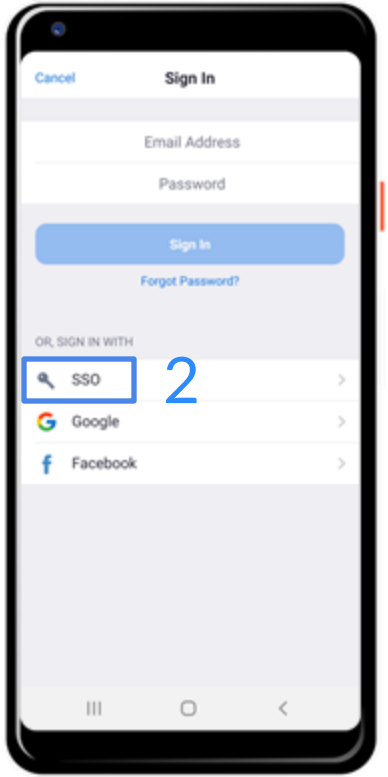
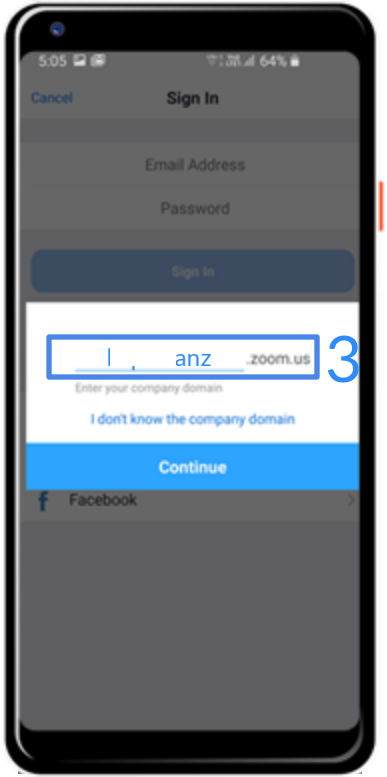
Zoom Mobile App

Logging In





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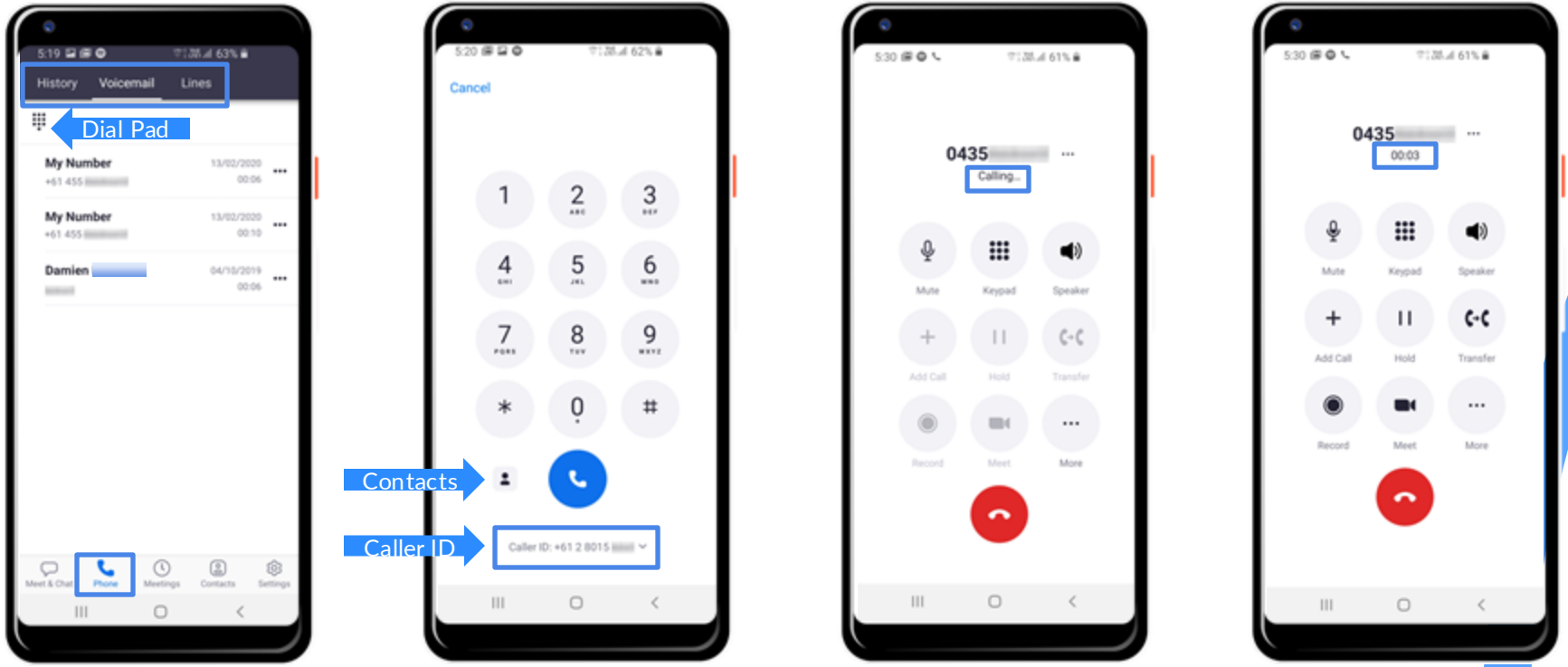
Zoom Mobile App

In-App Experience



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Voicemail

Listening to Zoom Phone Voicemail via Email

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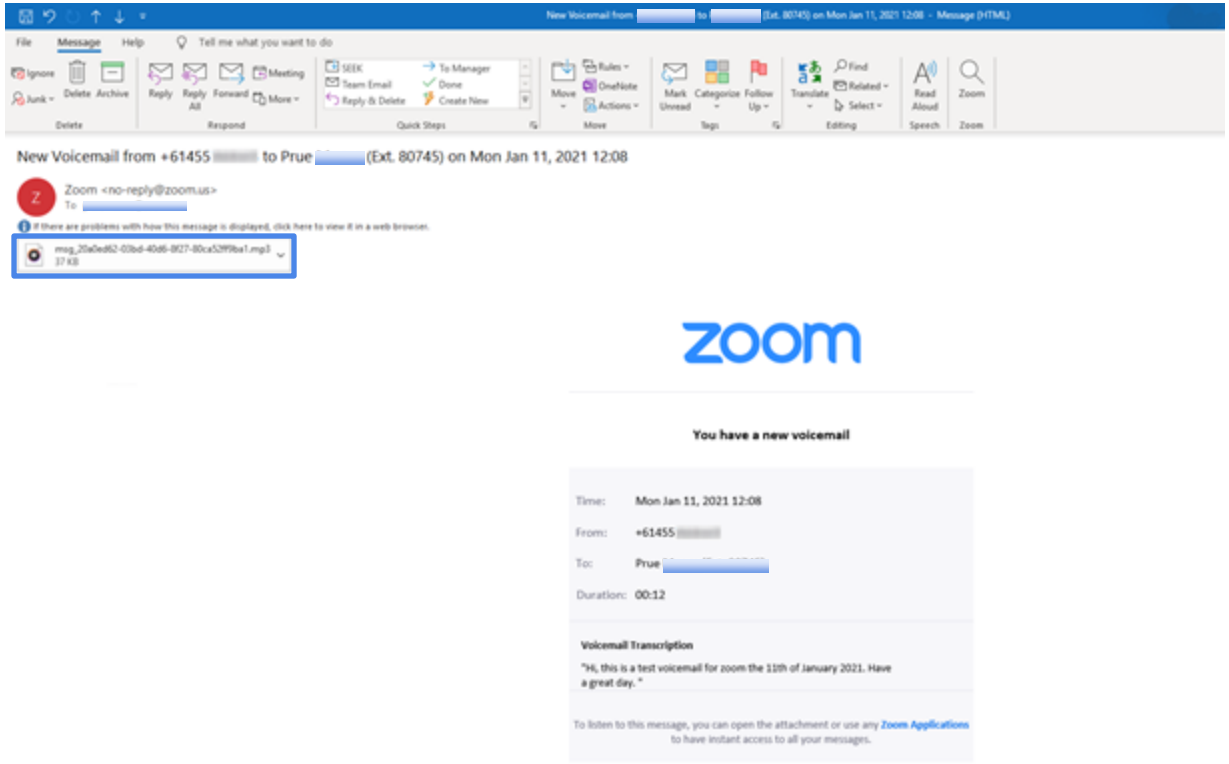
Voicemail Retrieval

From Email



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Zoom Resources & Support

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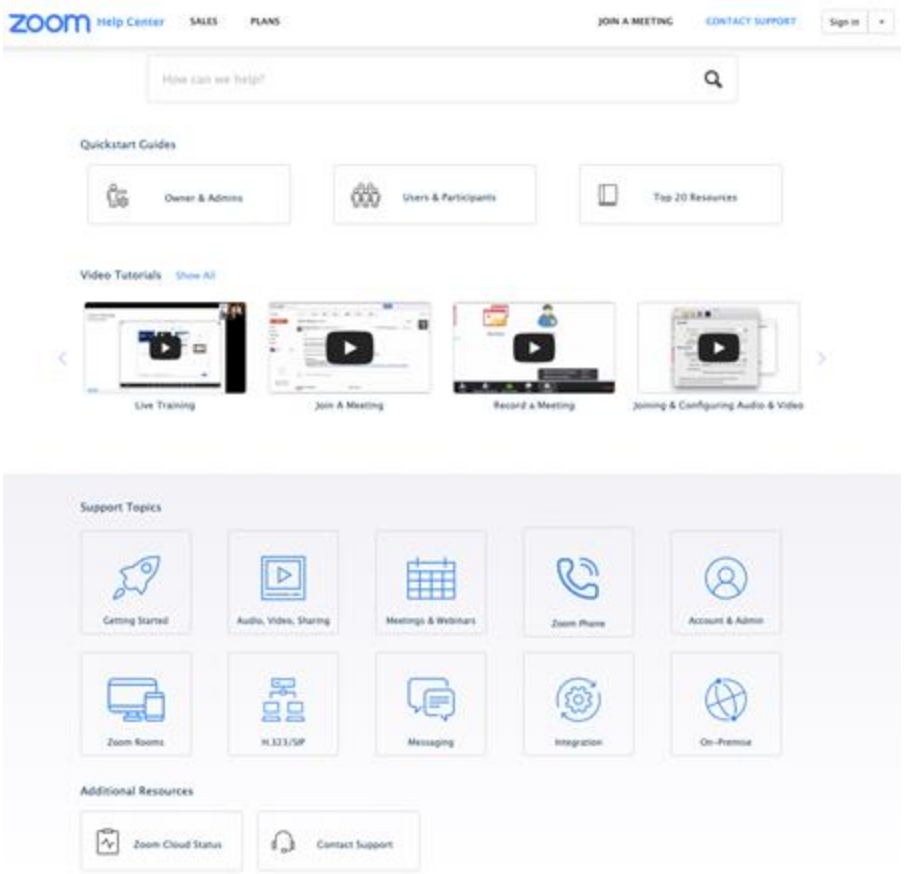
Zoom Resources and Support

Kaplan Service Desk
- Phone: 02 8248 6733
- Email: NZITSupport@kaplan.edu.au
- Website: kaplananz.freshservice.com

When submitting tickets, always include:
- Meeting ID or Caller ID
- Impacted User(s)
- Screenshots
- Details (date, time, duration, errors)

Zoom Help Center: support.zoom.us
- Video Tutorials
- Technical how-to's



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Zoom Resources and Support

ZOOM PHONE

Administrative

- Getting started with Zoom Phone (admin)
- Encryption for Zoom Phone
- Zoom Phone certificate update
- Managing the main company number and caller ID name
- Managing phone users
- Changing phone user settings

See all 36 articles

User

- Getting started with Zoom Phone (users)
- Making and receiving calls
- Using SMS
- Frequently asked questions about SMS
- Enabling location permission and managing addresses for emergency calling
- Switching between and merging a phone call and meeting

See all 31 articles

Hardware

- Getting started guide for provisioning desk phones
- Quick start guide for Polycom VVX series phones
- Quick start guide for Yealink T4 and T5 series phones
- Managing phones and devices
- Configuring desk phone provision templates
- Configuring the interface language for Polycom and Yealink devices

See all 29 articles

Number Ordering and Porting

- Requesting phone numbers
- Common issues and questions for porting
- Requesting a number port for US, Canada, or Puerto Rico
- Requesting a project port (more than 100 numbers) for US, Canada, or Puerto Rico
- Requesting a toll-free number port for US and Canada
- Requesting a number port (APAC)

See all 15 articles

User

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New Articles

New Articles And Comments

- Getting started with Zoom Phone (users)
- Making and receiving calls
- Using SMS
- Frequently asked questions about SMS
- Enabling location permission and managing addresses for emergency calling
- Switching between and merging a phone call and meeting
- Using in-call controls
- Inbound call notifications
- Using call flip
- Viewing phone contacts in the Zoom mobile app
- Transferring calls
- Using call park
- Elevating or inviting a phone call to a Zoom meeting
- Handing off a phone call to a Zoom Room
- Using click-to-dial and highlight-to-call
- Using the audio library to customize greetings and hold music
- Managing voicemail messages
- Viewing call history and recordings
- Switching a call to your phone carrier
- Changing phone settings (web portal)
- Changing phone settings (desktop client or mobile app)
- Setting up speed dial and busy lamp field (BLF)
- Frequently asked questions about caller ID
- Testing computer or device audio for Zoom Phone
- Setting up call delegation
- Using call delegation (desktop client or mobile app)
- Using shared line groups (desktop client or mobile app)
- Zoom Phone features comparison
- Error codes for Zoom Phone
- Using call monitoring (listen, whisper, barge, take over)

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Thank You

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