

Zoom Phone User Training



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



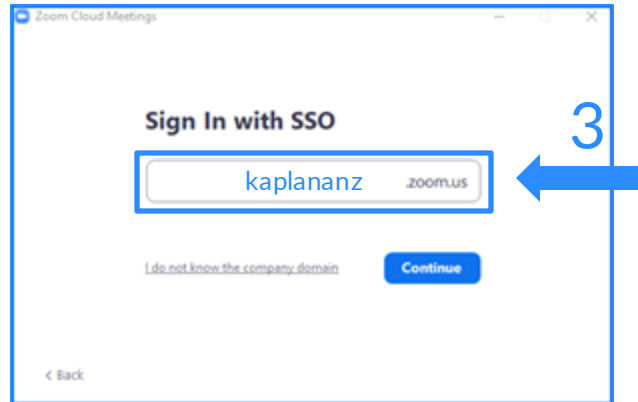
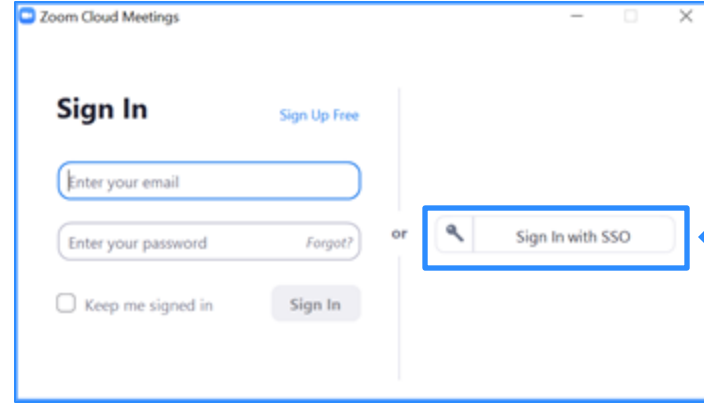
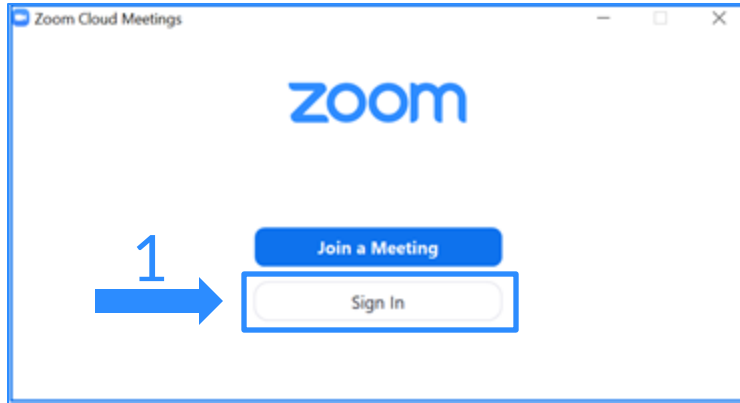
Resources and Support

Using Zoom Phone

Zoom Desktop Client

Zoom Desktop Application

Logging In



Zoom Desktop Application

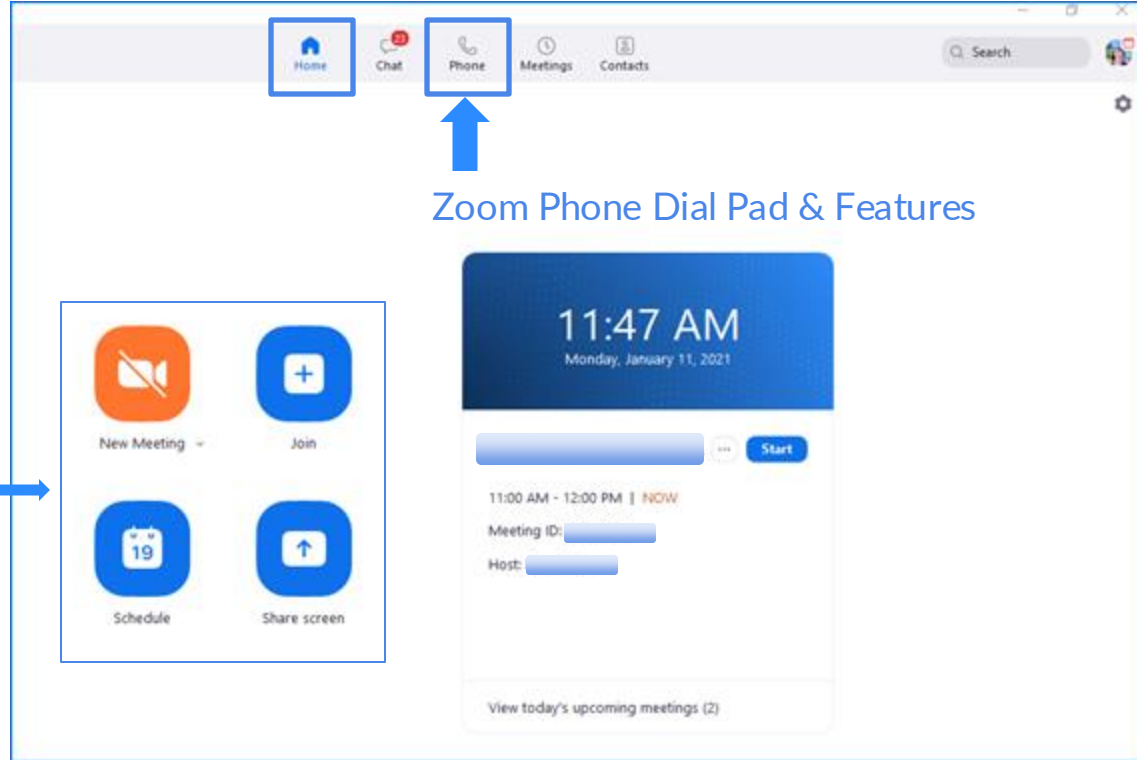
Home Screen

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

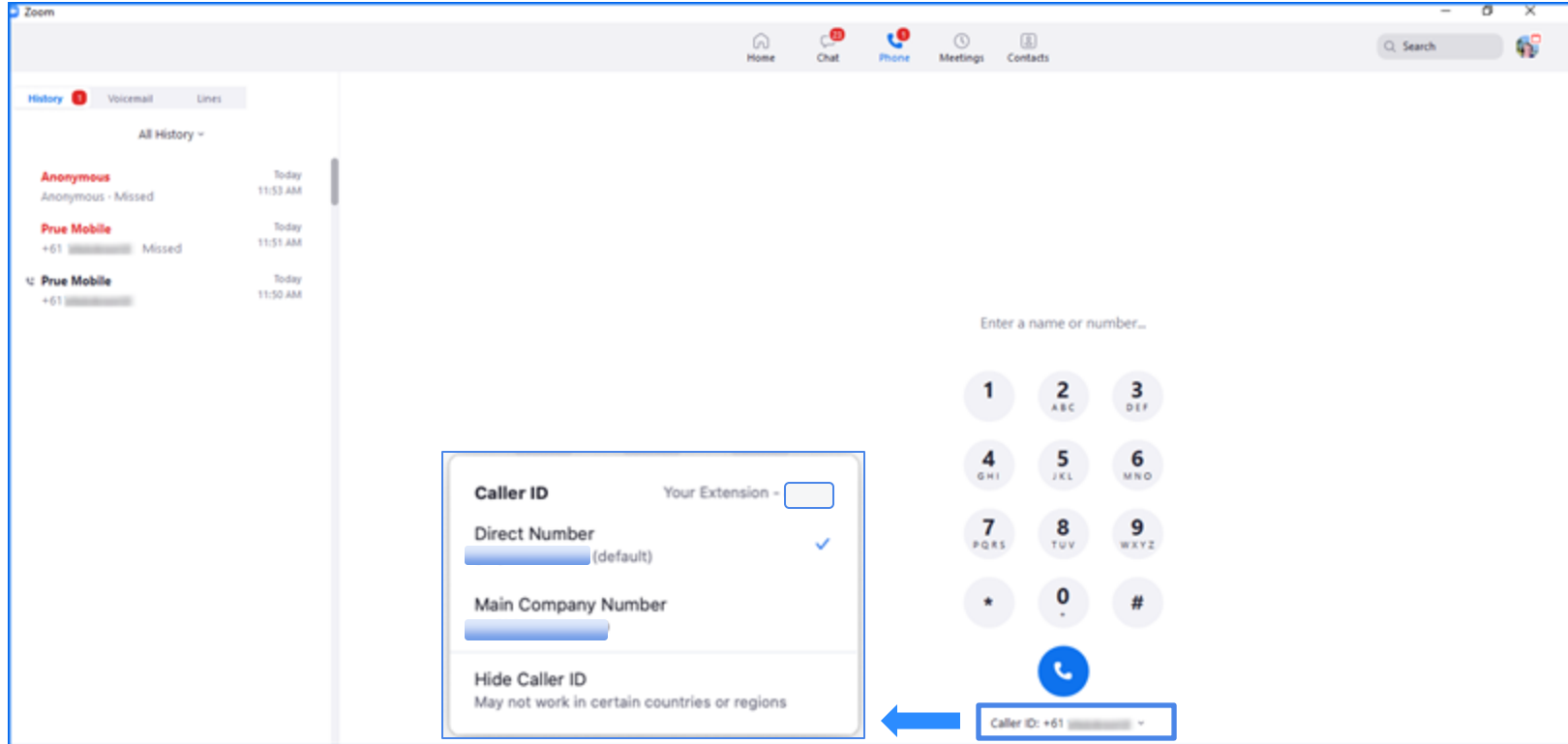
Share Screen
Initiates screen share within a Zoom Room



Zoom Phone Dial Pad & Features

Zoom Desktop Application

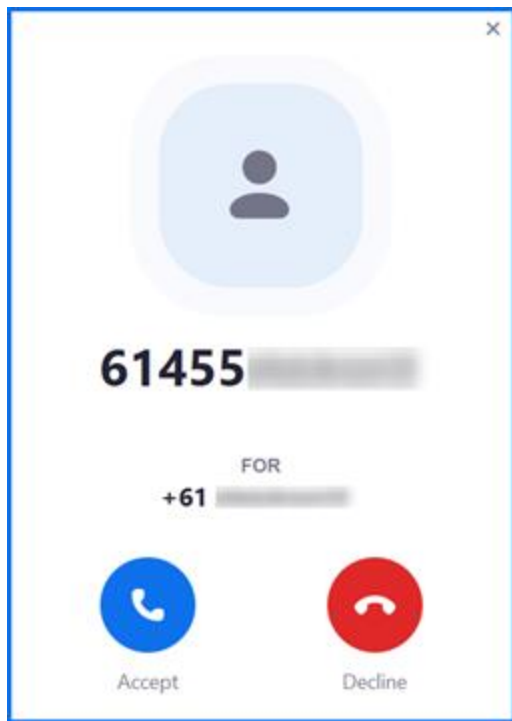
Zoom Phone (Dial Pad)



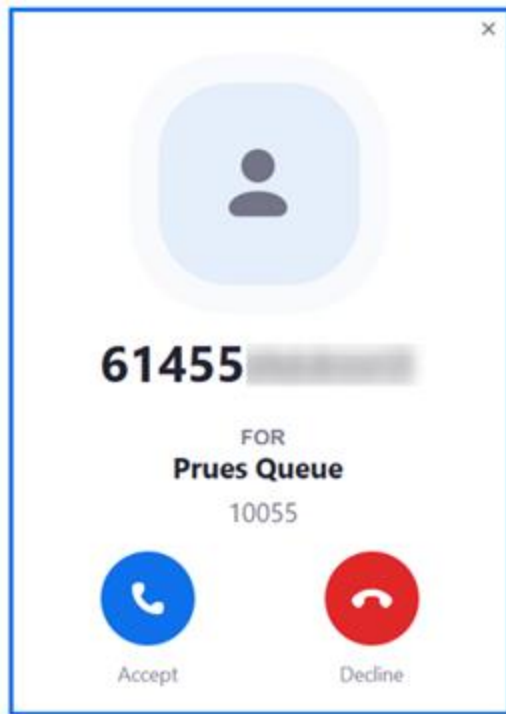
Zoom Desktop Application

Zoom Phone (Inbound calls)

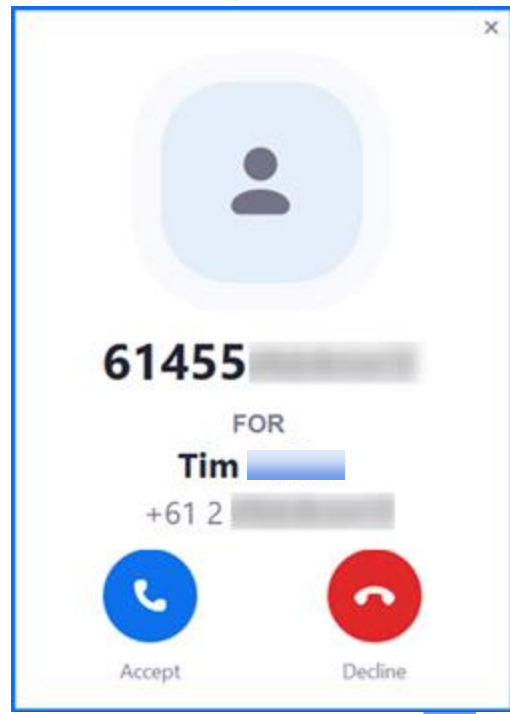
Direct calls



Call Queue calls

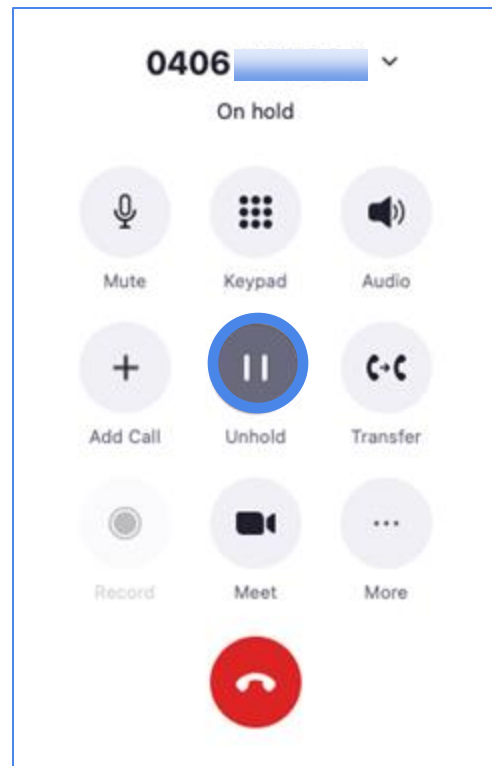
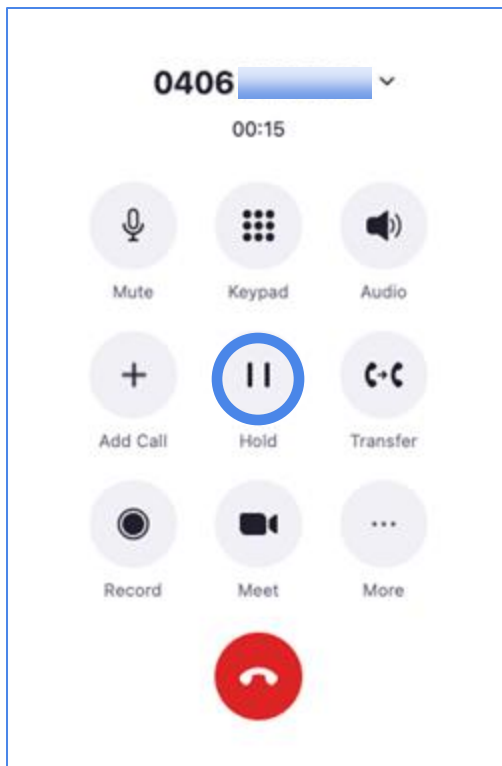


Delegate calls



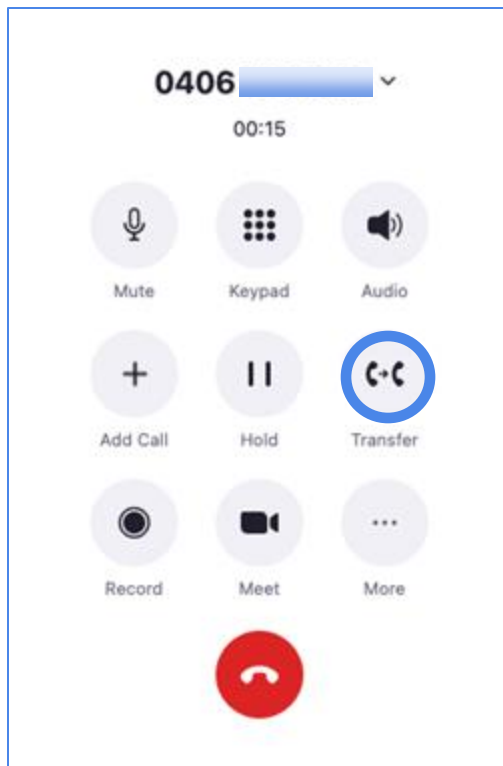
Zoom Desktop Application

Zoom Phone (Hold/Unhold)

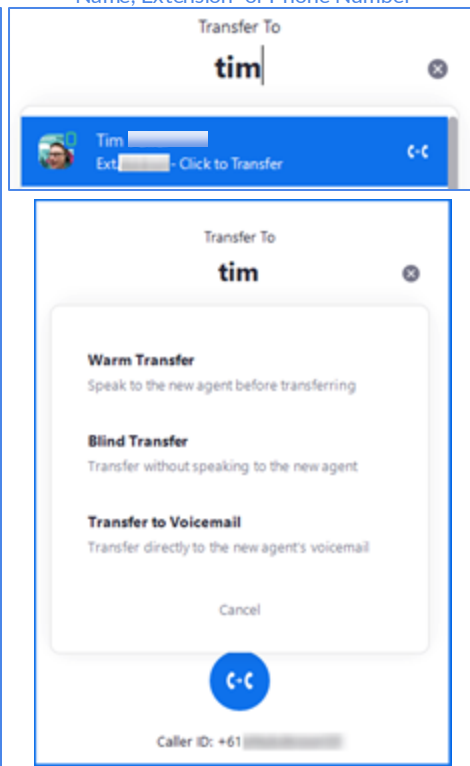


Zoom Desktop Application

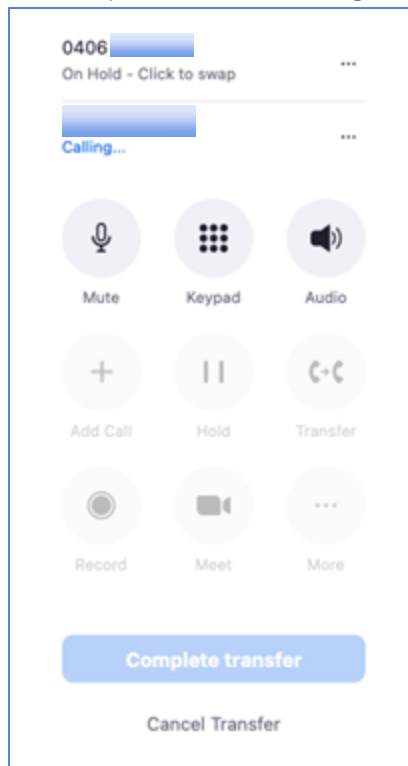
Zoom Phone (Transfer)



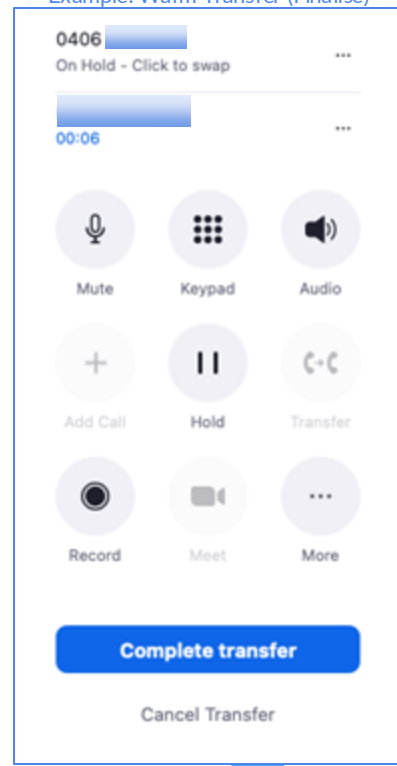
Name, Extension or Phone Number



Example: Warm Transfer (Calling)

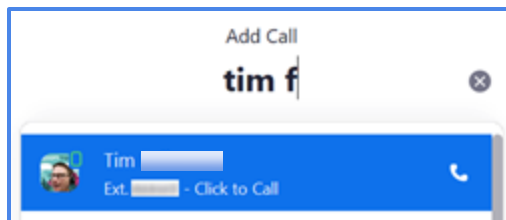
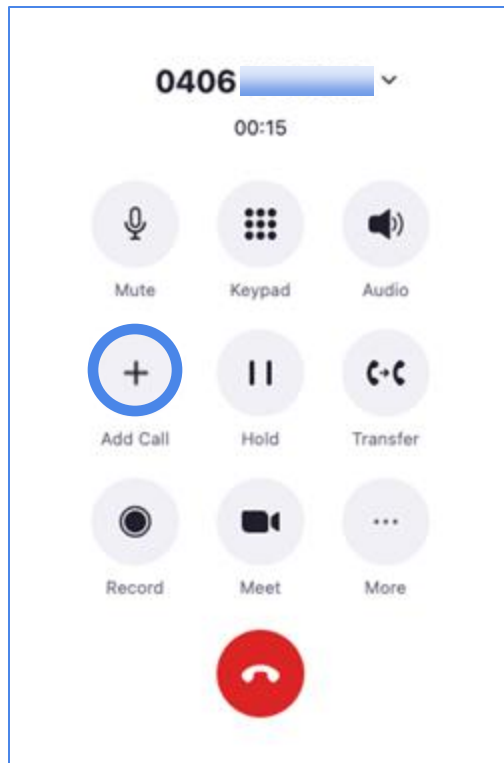


Example: Warm Transfer (Finalise)

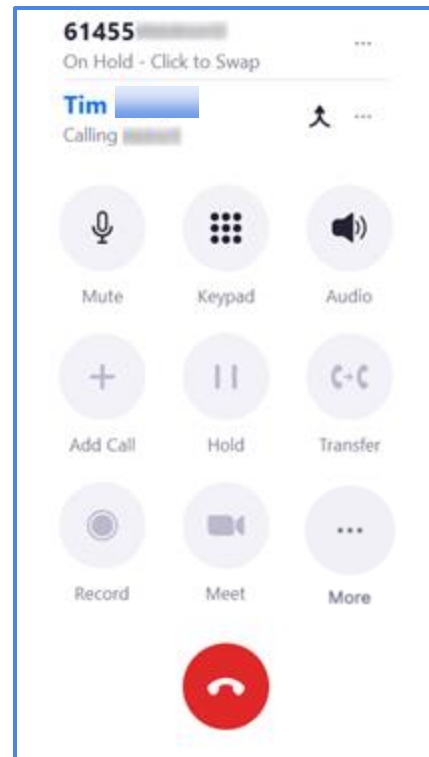


Zoom Desktop Application

Zoom Phone (Add Call | Conference)

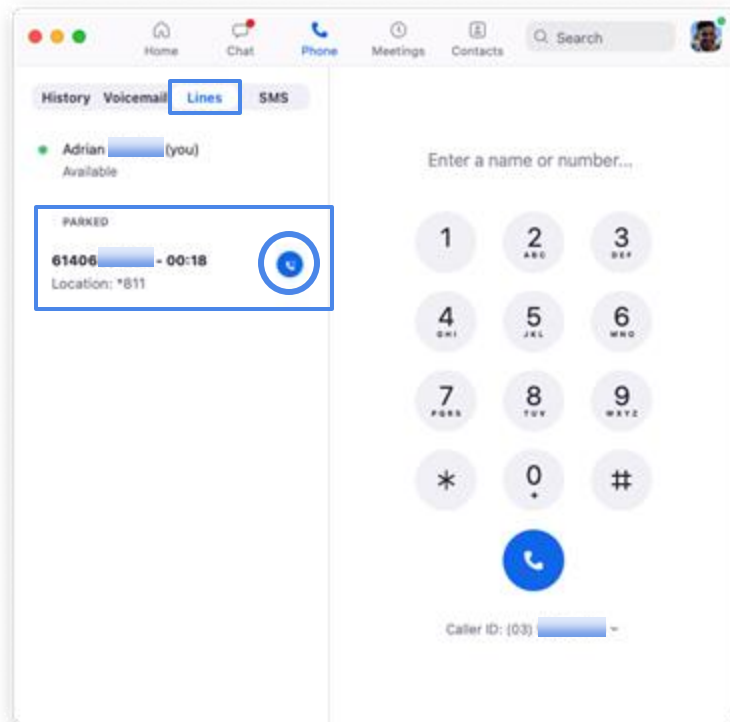
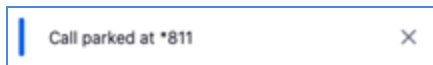
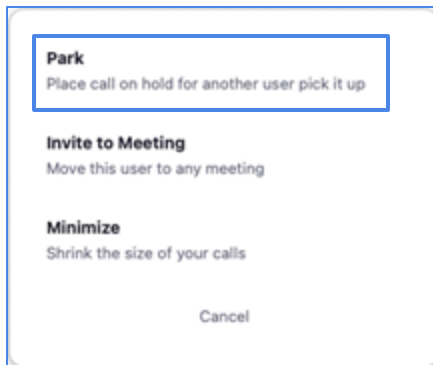
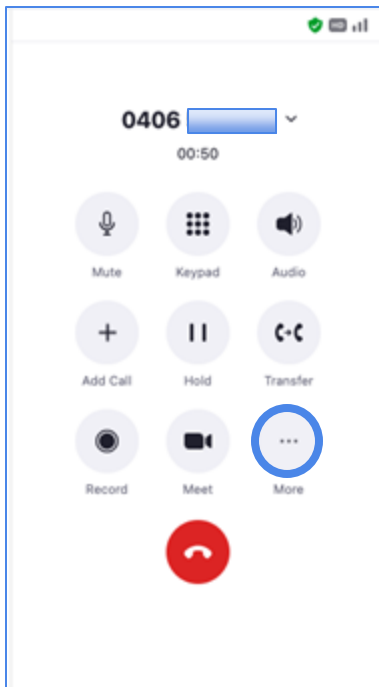


Name, Extension or Phone Number







Zoom Desktop Application






Zoom Phone (In-Call 'More' options)



Zoom Desktop Application

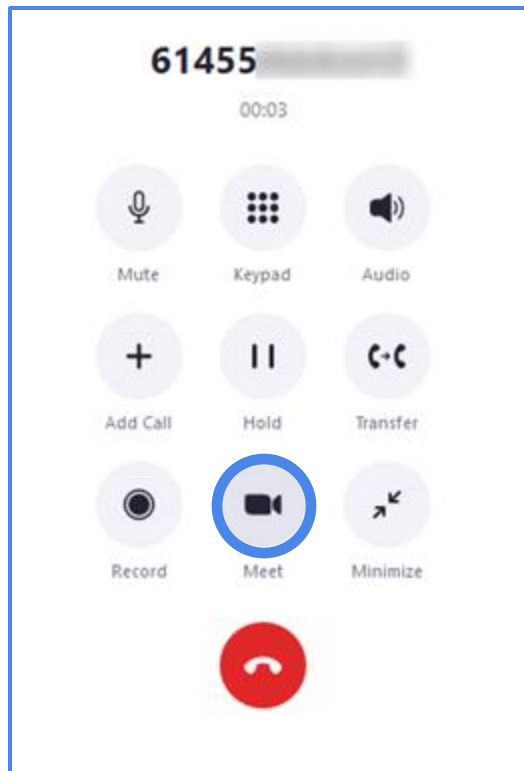
Presence Status Icons

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

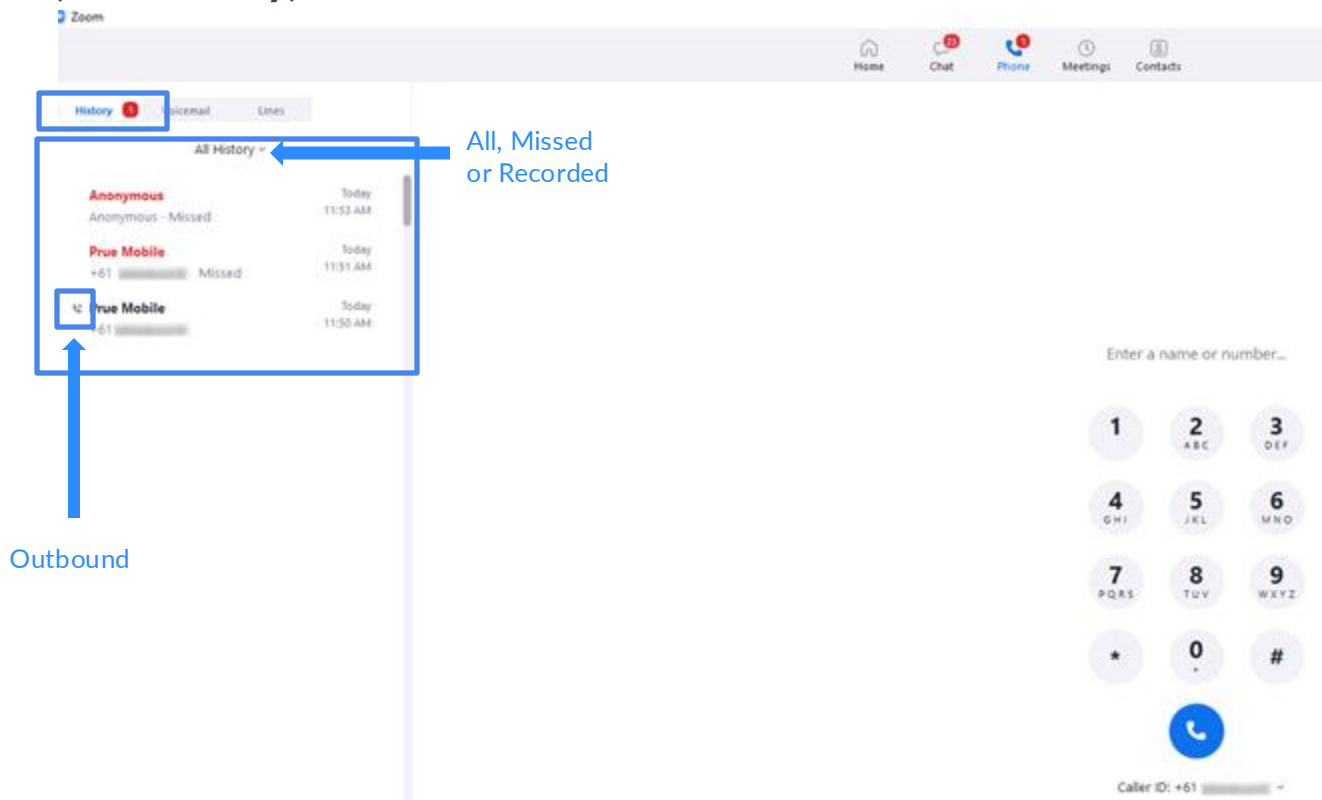
Zoom Desktop Application

Zoom Phone (Elevate to Zoom Meeting)



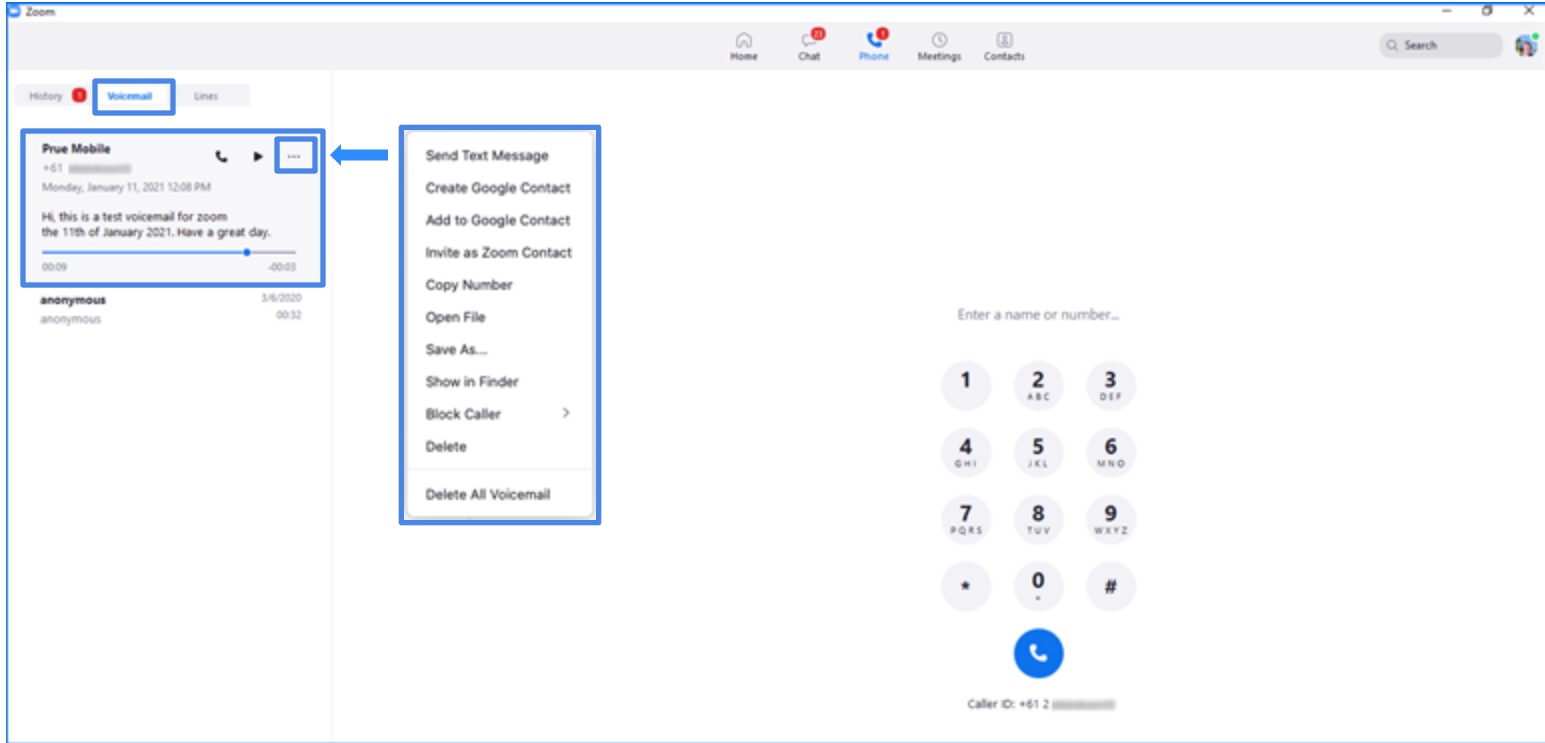
Zoom Desktop Application

Zoom Phone (Call History)



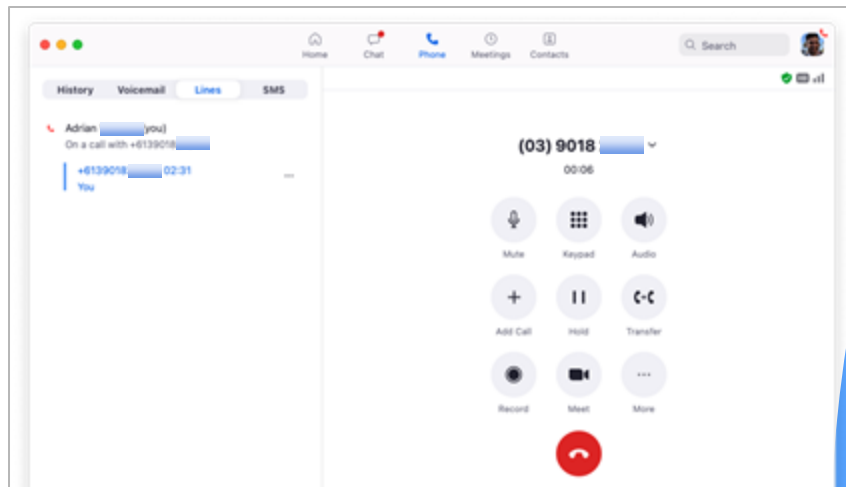
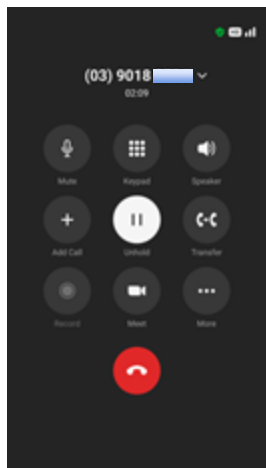
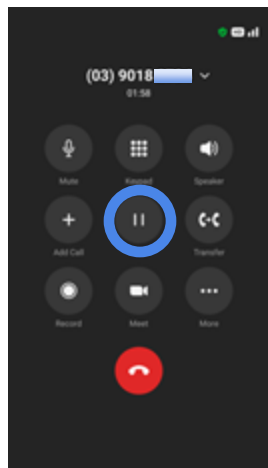
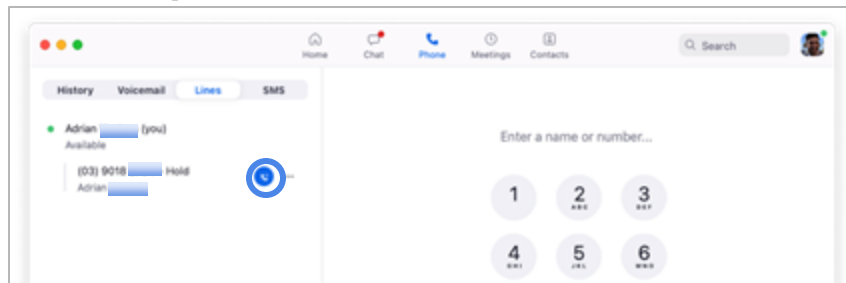
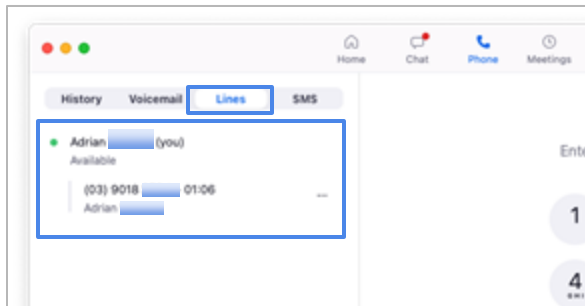
Zoom Desktop Application

Zoom Phone (Voicemail)



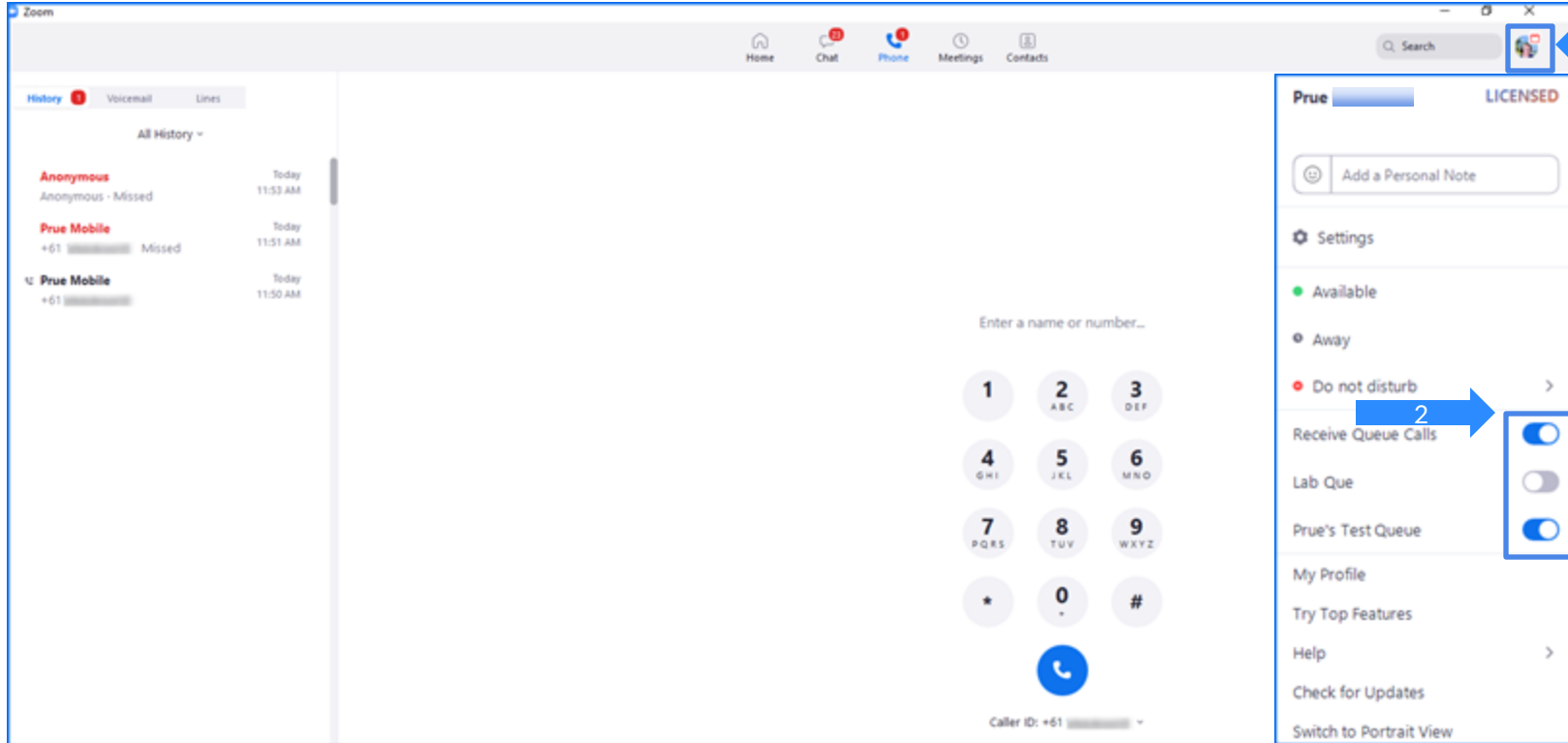
Zoom Desktop Application

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



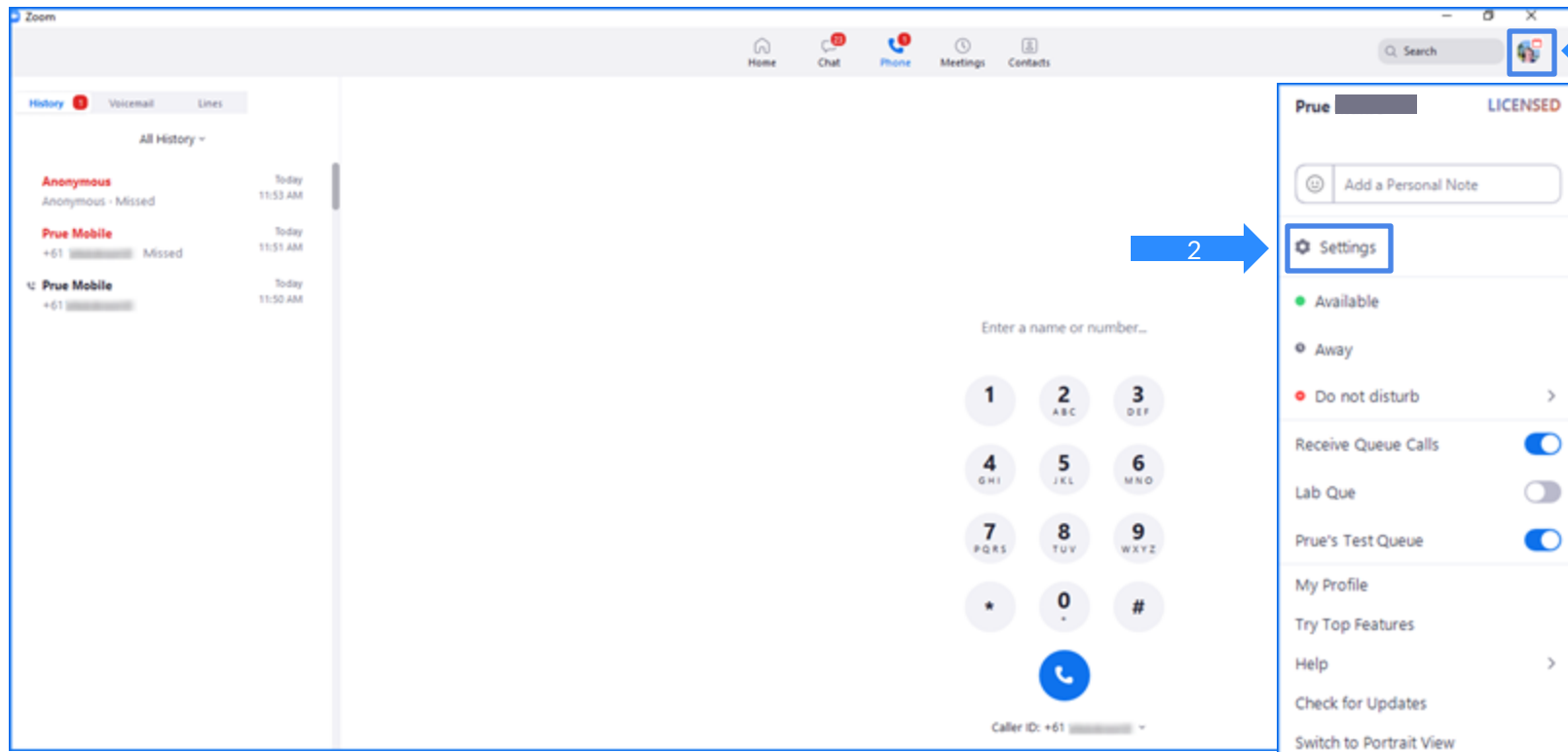
Zoom Desktop Application

Zoom Phone (Receiving Call Queue Calls)



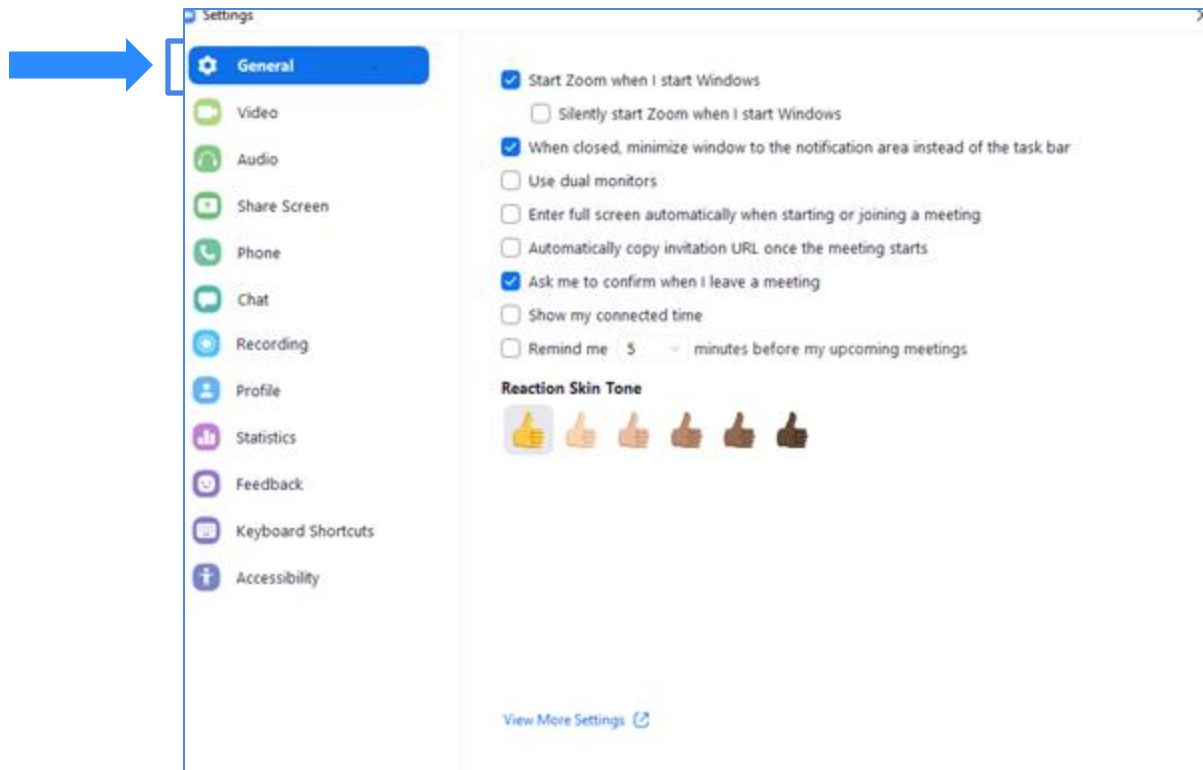
Zoom Desktop Application

Zoom Phone (Accessing Settings)



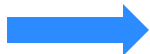
Zoom Desktop Application

Zoom Phone (Settings: General)



Zoom Desktop Application

Zoom Phone (Settings: Audio)



Settings

General
Video
Audio
Share Screen
Phone
Chat
Background & Filters
Recording
Profile
Statistics
Feedback
Keyboard Shortcuts
Accessibility

Speaker

Test Speaker Plantronics Savi 8200 Office Series

Output Level: [Progress Bar]

Output Volume: [Slider]

☒ Use separate audio device to play ringtone simultaneously **Recommended**

Speaker: BenQ RL2755 (BenQ RL2755)

Output Volume: [Slider]

Microphone

Test Mic Plantronics Savi 8200 Office Series

Input Level: [Progress Bar]

Input Volume: [Slider]

☒ Automatically adjust microphone volume

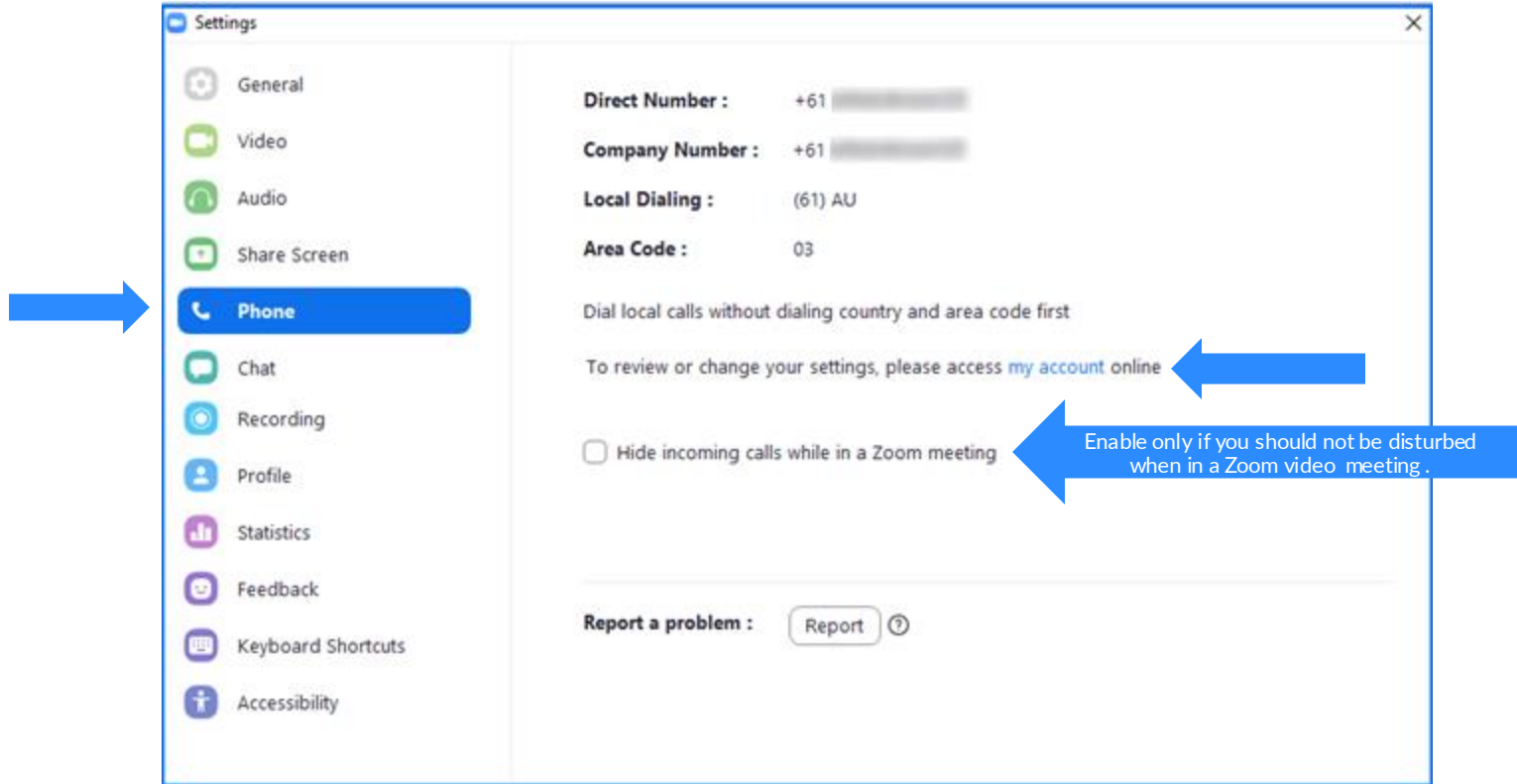
Suppress background noise [Learn More](#)

☒ Auto
☐ Low (faint background sound)
☐ Medium (computer fan, pen taps)
☐ High (typing, dog barks)

Music and Professional Audio

Zoom Desktop Application

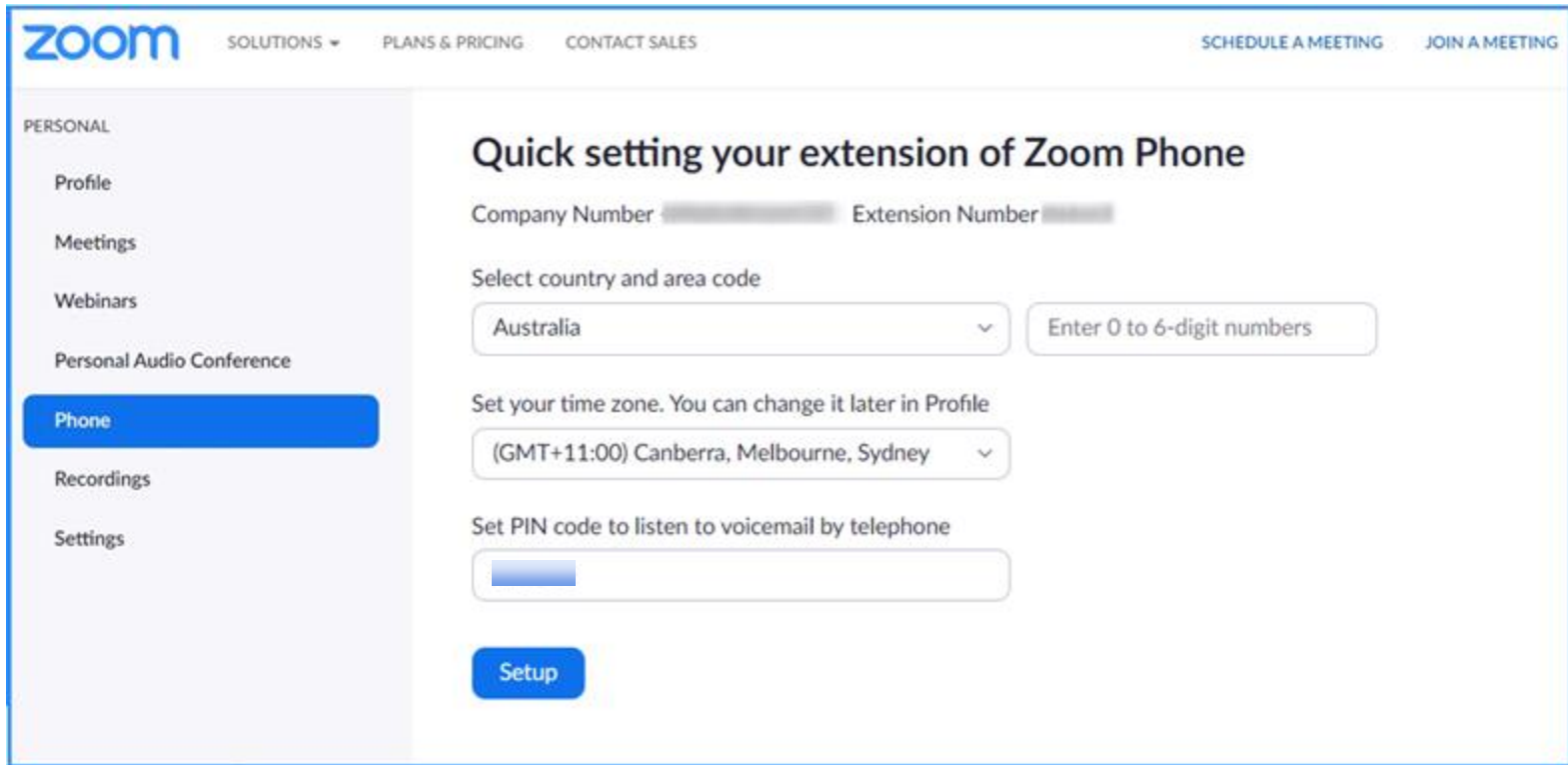
Zoom Phone (Settings: Phone)



Zoom Web Portal

Zoom Web Portal

Phone (Initial Setup)



The screenshot shows the Zoom Web Portal interface for setting up a Zoom Phone extension. The top navigation bar includes the Zoom logo, links for SOLUTIONS, PLANS & PRICING, CONTACT SALES, SCHEDULE A MEETING, and JOIN A MEETING. The left sidebar lists PERSONAL settings: Profile, Meetings, Webinars, Personal Audio Conference, Phone (highlighted in blue), Recordings, and Settings. The main content area is titled 'Quick setting your extension of Zoom Phone' and contains the following fields:

- Company Number:
- Extension Number:
- Select country and area code: A dropdown menu showing 'Australia' and a button 'Enter 0 to 6-digit numbers'.
- Set your time zone. You can change it later in Profile: A dropdown menu showing '(GMT+11:00) Canberra, Melbourne, Sydney'.
- Set PIN code to listen to voicemail by telephone:
- A blue 'Setup' button at the bottom.

Zoom Web Portal

Phone (Settings)

zoom SOLUTIONS ▾ PLANS & PRICING CONTACT SALES

PERSONAL

- Profile
- Meetings
- Webinars
- Personal Audio Conference
- Phone**
- Recordings
- Settings

History Voicemail Recording **Settings**

Site US/XX - Remote

Package AU/NZ Unlimited Calling Plan ⓘ

Number(s) (02) [redacted] (Australia) ⚠

Company Number +1 [redacted]

Emergency Address ⓘ 55 [redacted] BLVD, SAN JOSE, California 95113, United States [Manage](#)

Personal Emergency Address [Manage](#)

Outbound Caller ID Prue [redacted] (02) [redacted] (Australia) ▾

Country Australia (+61) ▾

Area Code ⓘ 03 [Edit](#)

Zoom Web Portal

Phone (Settings)

The screenshot shows the Zoom Phone Settings page. A blue arrow points from the 'Edit' link next to '24 Hours, 7 Days a Week' to the 'Business Hours' modal. Another blue arrow points from the 'Forward to voicemail' dropdown menu to the 'Add Audio' modal.

zoom SOLUTIONS PLANS & PRICING CONTACT SALES SCHEDULE A MEETING JOIN A MEETING

Attend Live Training
Video Tutorials
Knowledge Base

Business Hours

24 Hours, 7 Days a Week [Edit](#)

Call Handling [Edit](#)
Zoom Applications

Call Handling Ring Mode
Simultaneous

Max Wait Time
15 seconds

When a call is not answered
Forward to voicemail

Voicemail Greeting
Default [Audio Library](#)

Forward to voicemail
Play a message, then disconnect
Disconnect
Forward to another extension

The 'Business Hours' modal is shown. A blue arrow points from the 'Audio Library' link in the settings to the 'Add Audio' button in the modal.

Business Hours

☐ 24 Hours, 7 Days a Week

☒ Custom Hours

<input type="checkbox"/> Sun	From	8:00 AM	To	5:00 PM	<input type="radio"/> 24 Hours
<input checked="" type="checkbox"/> Mon	From	8:00 AM	To	5:00 PM	<input type="radio"/> 24 Hours
<input checked="" type="checkbox"/> Tue	From	8:00 AM	To	5:00 PM	<input type="radio"/> 24 Hours
<input checked="" type="checkbox"/> Wed	From	8:00 AM	To	5:00 PM	<input type="radio"/> 24 Hours
<input checked="" type="checkbox"/> Thu	From	8:00 AM	To	5:00 PM	<input type="radio"/> 24 Hours
<input checked="" type="checkbox"/> Fri	From	8:00 AM	To	5:00 PM	<input type="radio"/> 24 Hours
<input type="checkbox"/> Sat	From	8:00 AM	To	5:00 PM	<input type="radio"/> 24 Hours

Audio hours to every day

[Cancel](#) [OK](#)

The 'Add Audio' modal is shown. A blue arrow points from the 'Add Audio' button in the 'Audio Library' modal to the 'Next' button in the 'Add Audio' modal.

Add Audio

[Record by Computer](#) [Upload](#)

Adjust Volume

Speak to your computer microphone. If the input level does not turn green, adjust the volume slider.

Input Level ■■■■■■■■■■

Input Volume ■■■■■■■■■■

[Next](#) [Cancel](#)

The 'Audio Library' modal is shown. A blue arrow points from the 'Add Audio' button in the 'Audio Library' modal to the 'Next' button in the 'Add Audio' modal.

Audio Library

[Add Audio](#)

You can keep up to 10 audio files.

[Cancel](#) [Use the Audio](#)

Zoom Web Portal

Phone (Settings)

The screenshot shows the Zoom Web Portal interface for Phone Settings. The top navigation bar includes the Zoom logo, links for SOLUTIONS, PLANS & PRICING, CONTACT SALES, and a dropdown for Personal Greeting. On the right, there are links for SCHEDULE A MEETING and JOIN A MEETING. The main content area is divided into two sections: Closed Hours and Holiday Hours. Each section has a 'Call Handling' link with an 'Edit' button. Two callout boxes are present: 'Call Handling for Closed Hours' and 'Holiday Hours'. The 'Call Handling for Closed Hours' callout shows a toggle for 'Zoom Applications' and a text box for 'Add Personal Phone Number'. The 'Holiday Hours' callout shows a table with one entry: 'Australia Day' on '01/27/2020'.

Zoom Web Portal

SOLUTIONS ▾ PLANS & PRICING CONTACT SALES Personal Greeting ▾

SCHEDULE A MEETING JOIN A MEETING ▾

Closed Hours

Call Handling [Edit](#)

You have not enabled any items for Call Handling.

When a call is not answered

Forward to voicemail ▾

Vicemail Greeting

Default ▾ [Audio Library](#)

Holiday Hours

Holiday List [Edit](#)

Australia Day 01/27/2020 [Edit](#) [Delete](#)

[Add Holiday](#)

Call Handling for Closed Hours

☐ Zoom Applications

[Add Personal Phone Number](#)

There aren't any enabled items in the incoming call forwarding list for closed hours. You will not receive any calls during the time if you save the operation.

[Close](#)

Holiday Hours

Australia Day	01/27/2020	Edit Delete
---------------	------------	---

[Add Holiday](#)

[Close](#)

Zoom Web Portal

Phone (Settings)

The screenshot displays the Zoom Web Portal interface for Phone Settings. The main content area includes sections for Delegation, Assistant for, and Line Keys. A blue callout box highlights the delegation settings, showing a modal for assigning privileges to a user named Huey. The modal includes fields for the user's name and extension, a list of delegation privileges (Place Calls, Answer Calls, Pick Up Hold Calls) with checkboxes, and a Delete Delegation button. A blue arrow points from the 'Set' link in the main Delegation section to the callout box.

Zoom Web Portal

SOLUTIONS ▾ PLANS & PRICING CONTACT SALES

SCHEDULE A MEETING JOIN A MEETING ▾

Delegation ⓘ Assign delegation privileges to [Set](#)

Assistant for ⓘ **Tim** ⓘ
Able to
Place Calls, Answer Calls, Pick Up Hold Calls

Line Keys

Primary Number ⓘ
(03) 8566 ⓘ

Positions ⓘ [Edit](#)

- Key 1: Ext. 80011, (03) 8566 ⓘ
Number - (03) 8566 ⓘ (Outbound Caller ID)
- Key 2: **Tim** ⓘ - Ext. ⓘ (03) 8566 ⓘ

Delegation ⓘ Assign delegation privileges to [Add](#)

Huey ⓘ x
Ext. ⓘ

Delegation Privileges

- ☒ Place Calls
- ☒ Answer Calls
- ☒ Pick Up Hold Calls

[Delete Delegation](#)

Zoom Web Portal

Phone (Settings)

The screenshot shows the Zoom Web Portal interface for Phone Settings. The top navigation bar includes the Zoom logo, links for SOLUTIONS, PLANS & PRICING, CONTACT SALES, SCHEDULE A MEETING, and JOIN A MEETING. The main content area is titled 'Others' and contains several settings sections:

- Voicemail:** Includes an 'Access' link with a help icon and an 'Add' button. Below this, a card displays 'Adrian Ventura(Current User)' and 'Ext. 82846'.
- Blocked List:** Includes a 'View or Edit' link and a toggle switch for 'Block Calls without Caller ID', which is currently turned off.
- Hold Music:** Includes a help icon, a dropdown menu set to 'Default', and a link to 'Audio Library'.
- Audio Prompt Language:** Includes a description 'Set the default audio prompt language for your extension.' and a dropdown menu set to 'British English'.
- User Status:** Displays 'Active'.

Zoom Web Portal

Phone (Voicemail)

zoom SOLUTIONS PLANS & PRICING CONTACT SALES SCHEDULE A MEETING JOIN A MEETING HOST A MEETING SIGN OUT

PERSONAL

- Profile
- Meetings
- Webinars
- Personal Audio Conference
- Phone**
- Recordings
- Settings


History **Voicemail** Recording Settings

Search by Name, Ext. or Number Read and Unread

	From	To	Voicemail	Time	
<input type="checkbox"/>	0455	Prue Ext.	0:00:06	Feb 13, 2020, 1:27 PM	Download Delete
<input type="checkbox"/>	0455	Prue Ext.	0:00:10	Feb 13, 2020, 1:25 PM	Download Delete
<input type="checkbox"/>	Damien Ext.	Prue Ext.	0:00:06	Oct 4, 2019, 8:23 AM	Download Delete

Zoom Web Portal

Phone (Call History)












SOLUTIONS ▾PLANS & PRICINGCONTACT SALES

Phone

Recordings

Settings

☒ All Call☐ Missed Call

<input type="checkbox"/>	Contact	Time	Duration	Result		
<input type="checkbox"/>	 Jenny  Ext. 	Feb 19, 2020, 5:28:25 PM	00:00:36	Call Connected	Details ▾	Delete
<input type="checkbox"/>	 0414 	Feb 18, 2020, 5:18:07 PM	00:01:28	Call Connected	Details ▾	Delete
<input type="checkbox"/>	0414 	Feb 18, 2020, 4:37:54 PM	00:16:06	Call Connected	Details ▾	Delete
<input type="checkbox"/>	 Nelson  Ext. 	Feb 17, 2020, 4:21:27 PM	00:07:54	Call Connected	Details ▾	Delete
<input type="checkbox"/>	0410 	Feb 17, 2020, 10:28:17 AM	00:18:19	Call Connected Accepted by Tim 	Details ▾	Delete

PERSONAL

Profile

Meetings

Webinars

Personal Audio Conference

Phone


History

VoiceMail


Recording


Settings

From

 21-02-20

To

 21-02-26

 Search by Name, Ext. or Number

Export

☐ Show missed calls only

0410 

Feb 17, 2020, 10:28:17 AM

00:18:19

Call Connected
Accepted by Tim 

[Details ▴](#)

[Delete](#)

From

0410 

To

Prue  (you)
Ext.  (02) 

Accepted by

Tim 

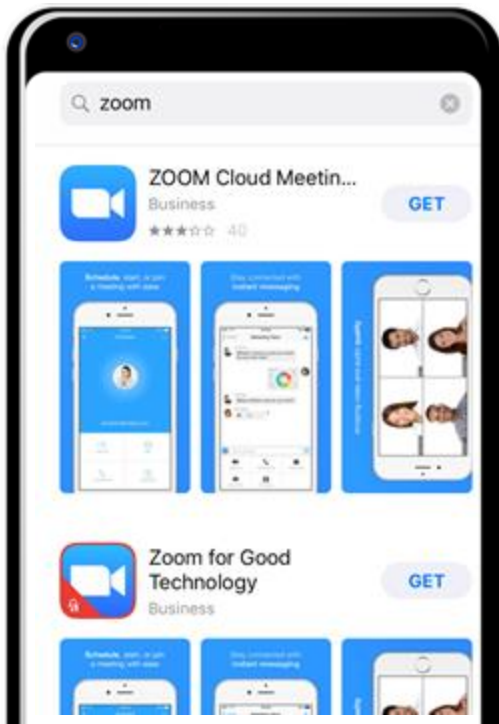
Using Zoom Phone

Zoom Mobile App

Zoom Mobile App

Download

iOS → App Store

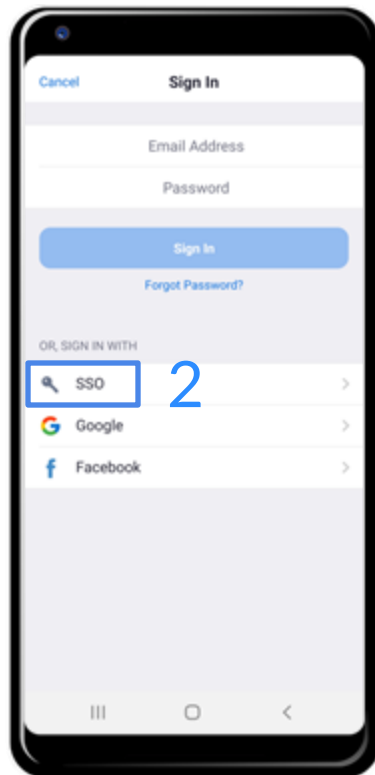


Android → Google Play Store



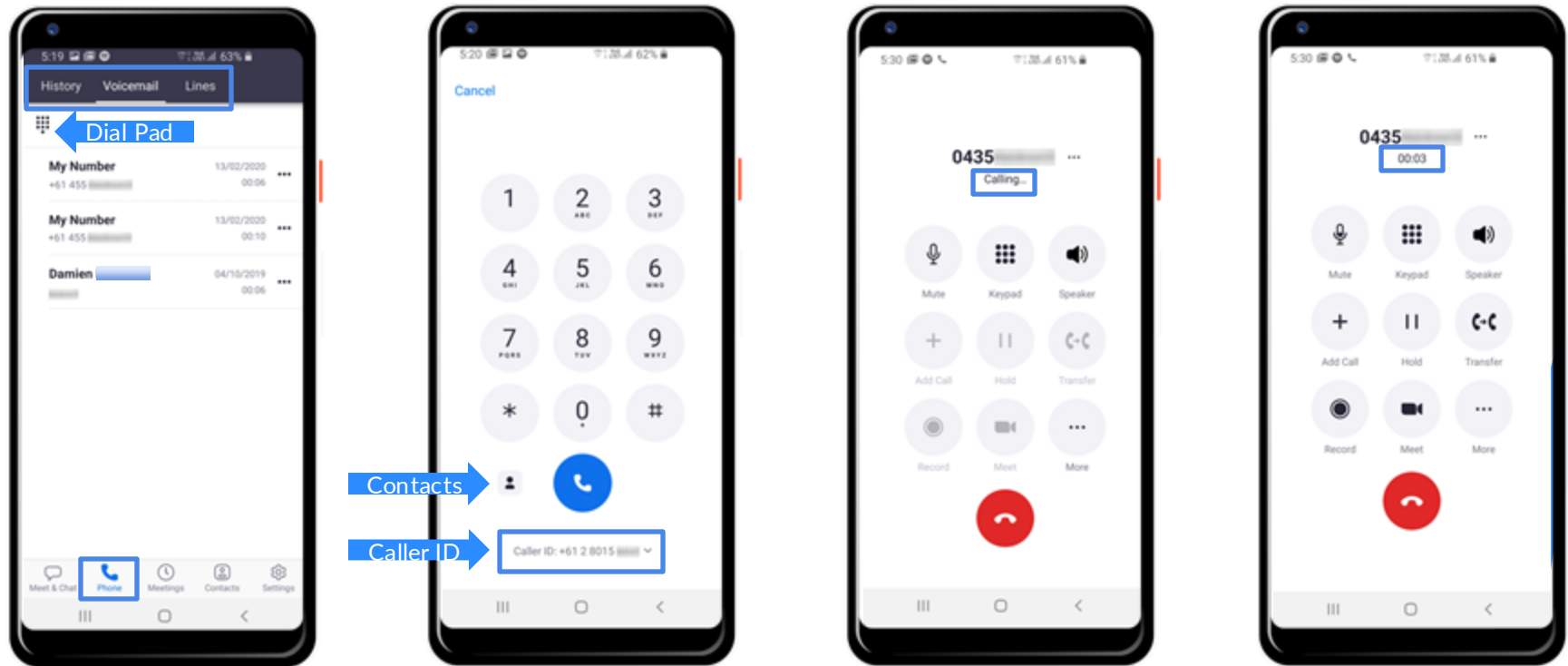
Zoom Mobile App

Logging In



Zoom Mobile App

In-App Experience

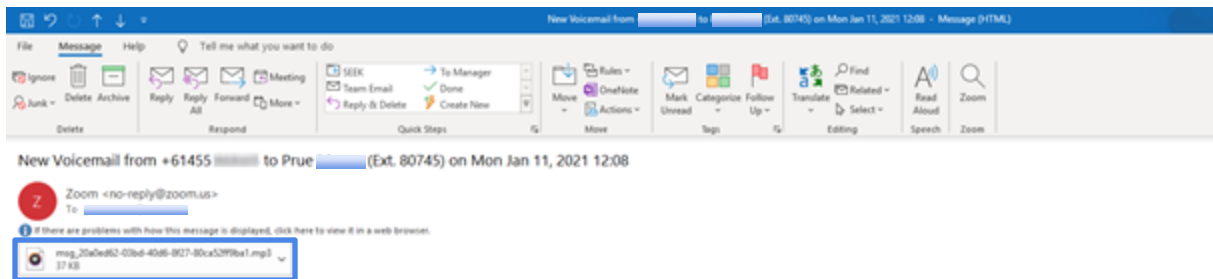


Voicemail

Listening to Zoom Phone Voicemail via Email

Voicemail Retrieval

From Email



You have a new voicemail

Time: Mon Jan 11, 2021 12:08
From: +61455 [redacted]
To: Prue [redacted]
Duration: 00:12

Voicemail Transcription

"Hi, this is a test voicemail for zoom the 11th of January 2021. Have a great day."

To listen to this message, you can open the attachment or use any [Zoom Applications](#) to have instant access to all your messages.

Zoom Resources & Support

Zoom Resources and Support

Kaplan Service Desk

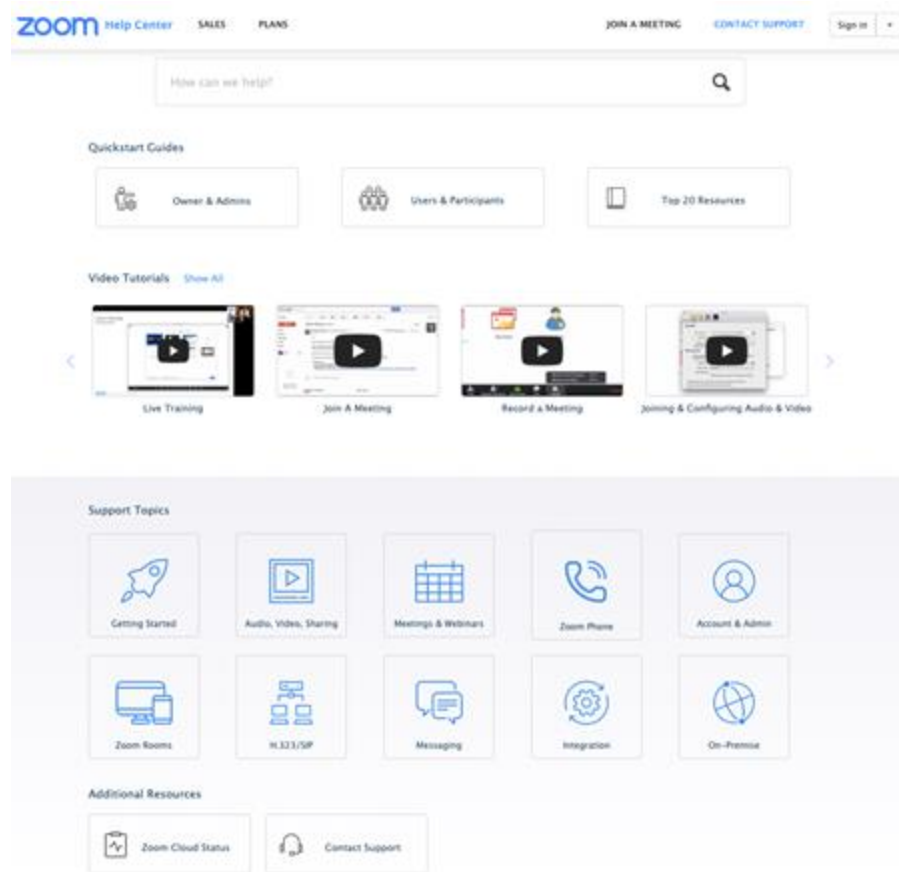
- Phone: 02 8248 6733
- Email: NZITSupport@kaplan.edu.au
- Website: kaplananz.freshservice.com

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



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](#)

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](#)

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](#)

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

Follow ▾

- 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
- Handling 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)

New Articles

New Articles And Comments



Thank You

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