

# Zoom Phone User Training

June 2022

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# Agenda

- Sign in and Configure
- Using Zoom Phone
- Mobile App
- Demo
- Q&A

zoom

# Web Portal

# Sign In & Configuration







Please go to **sandiego.zoom.us**.

Click Sign in.





# Sign in to Zoom

Enter sandiego in **Company Domain**.

Click Continue to sign in.



	REQUEST A DEMO	1.888.799.9666	RESOURCES 🗕	SUPPORT
JOIN A MEETING	HOST A MEETING 👻	SIGN IN	SIGN UP, IT'S	S FREE
9	Sign In w	ith SSO	C	





# Your Zoom Homepage



ZOOM VIDEO CONFERENCING

Join a Meet	ng
Host a Meet	ing
Sign In	

#### sandiego.zoom.us

- Join or Host Meetings
- View Getting Started Guide
- Download Zoom Client
- Visit Zoom Support
- Click Sign In to log in via SSO

			REQUEST	A DEMO 1.888.799.9666	RESOURCES -	SUPPORT
	& PRICING CONTACT SALES		SCHEDULE A MEETING	JOIN A MEETING 👻	HOST A MEETING	
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Profile	Voiceman					
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Phone	Company Number	(669) 252				
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Settings		Personal Emergency Address Manage				
MIN						
Dashboard	Outbound Caller ID	Jacob - (619) 415- (United States)				
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Phone System Management	Area Code 💿	669 Edit				
Account Management	Call Handling					
Advanced	Call Handling				(	
	Business Hours	24 Hours, 7 Days a Week Edit				

**Settings** 

 $\checkmark$ 

Manage Emergency Address.

Set Outbound Caller ID.

Create Business Hours.

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Configure	Zoom	Phone
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Attend Live Training Video Tutorials Knowledge Base		Zoom Applications Call Handling Ring Mode Simultaneous Max Wait Time 30 seconds		Forward to voice Play a message, t Disconnect	mail then disconnect				
		When a call is not answered Forward to voicemail Allow callers to reach an op	~), verator	Forward to anoth Forward to Exter	ner extension mal Contacts				
	Closed Hours	Leave voicemail greeting Default Call Handling Edit	<ul> <li>Audio Libr</li> </ul>	ary					0

#### **Settings**



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Closed Hours	Call Handling Edit     Call Handling King Mode: Simu Max Wait Time     30 seconds  When a call is not answered  Forward to voicemail  Allow callers to reach an op Leave voicemail greeting  Default	altaneous	Forward to Play a messi Disconnect Forward to a Forward to I	voicemail age, then disconnect another extension External Contacts			
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Settings

Create Closed Hours.

2



#### **Voicemail Greeting**

- To create a new voicemail greeting select Audio Library.
- Click Add Audio.
- Text to Speech, Record by Computer or Upload.

	Delegation & Assistant					
	Delegation ③	Assign delegation privile	ges to			
		User ~	Enter user name, email or Ext.	. Send In	vite Cancel	
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	Desk Phone		- 🔞 (= === =@gmail.cor	m) - Ext. <b>Hanne (Inactive)</b> , Main	Site	
	Keys & Positions	Primary Number ③	A minima (minima@zoom.us) - Ext	t. <b>Inactive)</b> , Main Site		
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#### Delegation

Click Add. 1

- Enter in the user name and click Send Invite.
- Choose Delegation Privileges.

		Configure Zoom Phone
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	Delegation Privileges         Place Calls         Place Calls         Delete Delegation	When a new delegation comes in, click View.
Assistant for $\ensuremath{}$	Tyler (Site: Main Site) Able to Place Calls	Select Accept.
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	REQUEST A DEMO 1.888.797.9466 RESOUR ACT SALES SCHEDULE A MEETING JOIN A MEETING + HOST A M	KES • SUPPORT MEETING • (F) Other Settings
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#### REQUEST A DEMO 1.888.799.9666 RESOURCES - SUPPORT R ZOOM HOST A MEETING -SOLUTIONS -PLANS & PRICING CONTACT SALES SCHEDULE A MEETING JOIN A MEETING -PERSONAL Phone > Settings > Keys & Positions Profile **Keys & Positions** Meetings Set up keys and edit key positions for desk phones. Learn More Webinars The shared device will have separate Keys & Positions setting in the device detail page. Personal Audio Conference Phone Key Key Type Line Subscription Alias Outbound Caller ID Recordings Ext. 1 Line (619) 415-\_\_\_\_ Same as Number Settings Jacob ADMIN Manage Key Dashboard User Management Modifying the Position will cause the device to resync. Room Management Alias (Optional) Outbound Caller ID Key Кеу Туре Line Subscription Phone System Management Ext. Account Management 1 Line (619) 415 Enter Alias Same as Number 1 1 Advanced Jacob 2 Set Key 1 1 3 1 1 Set Key

# **Configure Zoom Phone**

#### **Other Settings**

Note: relevant only if physical phone device



Manage Keys & Positions

		REQUEST A DEMO 1.888.799.9666 RESOURCE	S - SUPPORT
SOLUTIONS - PLANS & PRICING	CONTACT SALES	SCHEDULE A MEETING JOIN A MEETING + HOST A ME	ETING -
Profile	Language	English	Edit
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Webinars		Date Format mm/dd/yyyy Example: 08/15/2011	
Personal Audio Conference		Time × Use 24-hour time	
Recordings		Format	
Settings	Calendar and Contacts	We support the following services: Google Calendar, Microsoft Exchange, and Microsoft Offic	e 365
Account Profile	Integration		
Reports		Configure Calendar and Contacts Service	
	Sign-In Password		Edit
Attend Live Training	Host Key	Show	Edit
Video Tutorials Knowledge Base	Two-factor Authentication	Turned off	Turn on
	Signed-In Device	Sign Me Out From All Devices 😡	

#### Calendar & Contacts Integration

- Set up calendar integrations so that Zoom Meetings on your calendar are synced to the Zoom desktop client.
- Compatible with Google Calendar

# **Desktop Client**

# Using Zoom Phone



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Home Screen Settings

#### ZOOM ~

Password	Forgot?
Sign In	
✔ Keep me signed i	n
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**Home Screen Settings** 



**Home Screen Settings** 





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Lines	History Voicemail Lines SMS		Enter a name or number
<ul> <li>Click v next to caller ID to choose what line you would like to call out on.</li> <li>Then enter a name or number.</li> <li>Place the call by pressing the phone icon.</li> <li>If you have any shared lines they will show on the menu on the left.</li> <li>The users presence will also show to the left of their name.</li> </ul>	SHARED  Tyler		1 2   4 5   5 6    Caller ID Your Extension - Direct Number (19) 415+ (default) Main Company Number (669) 252- Tyler (669) 200- (shared) Hide Caller ID May not work in certain countries or regions

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#### Placing a Call

- Start typing a name or number to bring up your contacts list.
- You can also dial directly from the keypad.

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#### **Searching for Contacts**

- Enter a name or number in the search field
- This will bring up your contacts list.
- Click the contact from the dropdown menu to call the individual.

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# Zoom Desktop App

#### **Incoming Call**

- When someone calls you, a pop up **notification** will appear.
- Use the pop up to see who is calling before you answer.
- The For section will show who the caller is trying to reach:
  - Your personal line
  - Someone for whom you are a delegate
  - Call Queues you're a member of
  - Your Shared Lines, etc.

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#### **Active Call**

- Add Call: add up to 3 people to the Call. (3+ will become a Zoom Meeting).
- Hold: place call on hold.
- Transfer: transfer call to another number.
- **Record:** all parties will be notified when recording starts and stops.
- Meet: turn audio call into video call.
- More: park,invite to Meeting & minimize the call.

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#### Contacts



Contacts



# Active Call Walkthroughs



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#### Add a Caller

Search for a contact or use the keypad to dial.

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# Zoom Desktop App

#### Add a Caller



Zoom Desktop App

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#### Add a Caller

See both contacts listed.

Zoom Desktop App

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Meetings

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## **Zoom Desktop App**

#### Transfer

- Search for a **contact** by name or number.
- You can also dial directly from the keypad.

Transfer

If using the search bar, **click** to choose which number to transfer to.

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#### Warm Transfer

- Your caller will remain **On Hold** while you speak with the person you are warm transferring to.
- You can then **Complete or Cancel** the Transfer.

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### Zoom Desktop App

#### Warm Transfer

Click **Complete Transfer** to transfer the call and you will receive a notification informing that the transfer was successful.

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Record

#### Click **Record**.

An audio message will notify that the call is being recorded.

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# Record

Zoom Desktop App

#### Click Stop Recording.

An audio message will notify that the recording has stopped.

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#### Offline

Contact is not signed in to the Zoom desktop client or mobile app.

#### **Online (desktop)**

Contact is signed in on the Zoom desktop client.

#### **Online (mobile)**

Contact is signed in to the Zoom mobile client only.

#### Away

Contact is signed in to the Zoom desktop client, but the computer is inactive or they manually set their status to **Away**.

#### **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.

# **Busy Status**



Contact is in a calendar event (from a synced calendar) but hasn't joined a Zoom meeting.

#### 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.

# Zoom Mobile App





## Voicemail

![](_page_49_Picture_1.jpeg)

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## **Place a Call**

![](_page_50_Picture_1.jpeg)

![](_page_50_Picture_2.jpeg)

## **Choose Caller ID**

![](_page_51_Picture_1.jpeg)

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7 PQRS	8 TUV	9 wxyz
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