



# Zoom Phone User Training

June  
2022



# Agenda

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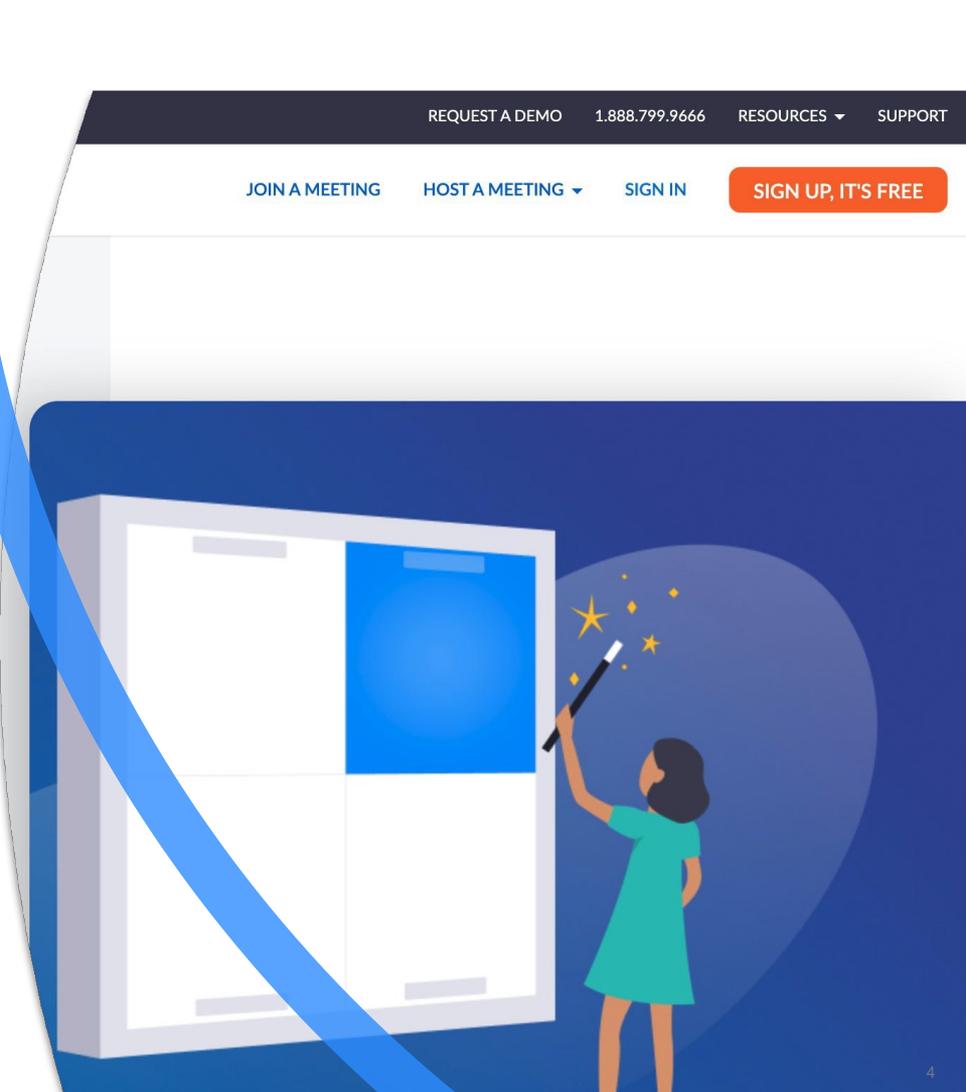
- Sign in and Configure
- Using Zoom Phone
- Mobile App
- Demo
- Q&A

# Web Portal

## Sign In & Configuration

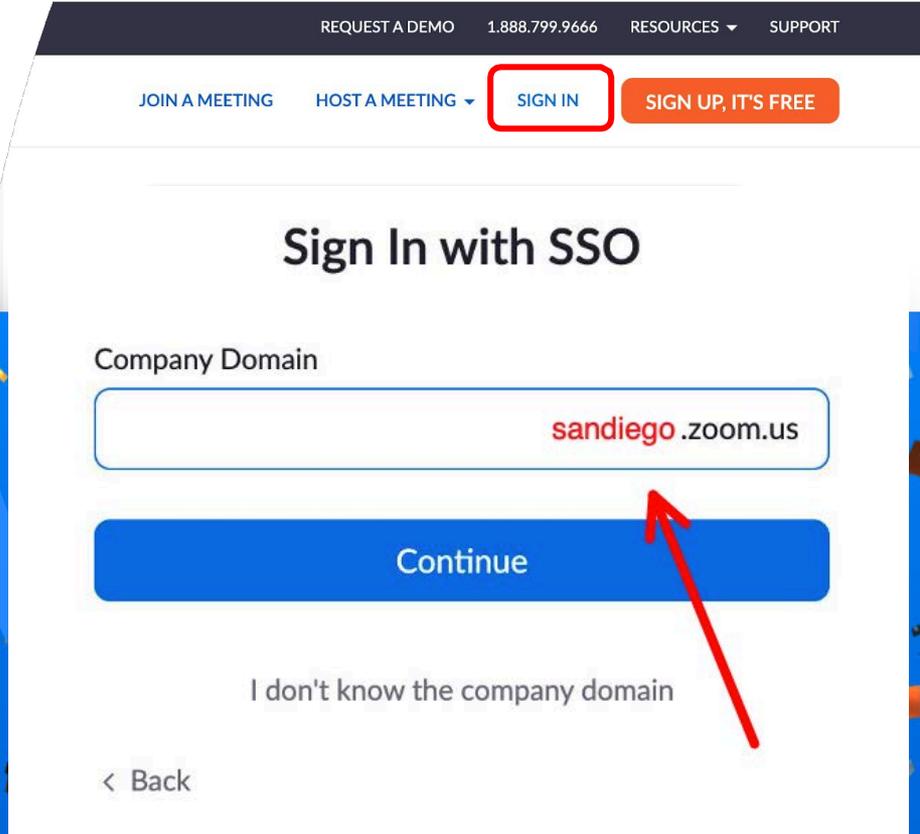
# Sign in to Zoom

- ✓ Please go to [sandiego.zoom.us](https://sandiego.zoom.us).
- ✓ Click **Sign in**.
- ✓ Sign in with Email and use **SSO only**



# 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 FREE

## Sign In with SSO

Company Domain

sandiego.zoom.us

**Continue**

I don't know the company domain

< Back

The screenshot shows the Zoom sign-in interface. At the top, there are navigation links: 'REQUEST A DEMO', '1.888.799.9666', 'RESOURCES', and 'SUPPORT'. Below these are 'JOIN A MEETING', 'HOST A MEETING', and a highlighted 'SIGN IN' button. A 'SIGN UP, IT'S FREE' button is also present. The main heading is 'Sign In with SSO'. Underneath, there is a 'Company Domain' label and a text input field containing 'sandiego.zoom.us'. A red arrow points to the 'Continue' button. Below the button is a link that says 'I don't know the company domain'. At the bottom left, there is a '< Back' link.

# Your Zoom Homepage

**sandiego.zoom.us**



**ZOOM VIDEO CONFERENCING**

Join a Meeting

Host a Meeting

Sign In

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

**Getting Started**

**Download Client**

**Zoom Support**

# Configure Zoom Phone

## Settings

The screenshot shows the Zoom Admin console interface. The top navigation bar includes 'zoom', 'SOLUTIONS', 'PLANS & PRICING', 'CONTACT SALES', 'SCHEDULE A MEETING', 'JOIN A MEETING', 'HOST A MEETING', and a user profile icon. The left sidebar lists 'PERSONAL' settings (Profile, Meetings, Webinars, Personal Audio Conference, Phone, Recordings, Settings) and 'ADMIN' settings (Dashboard, User Management, Room Management, Phone System Management, Account Management, Advanced). The 'Phone' setting is selected and highlighted in blue. The main content area shows the 'Settings' tab for the Phone configuration. It includes fields for Site (Main Site), Package (US/CA Unlimited Calling Plan), Number(s) ((619) 415-XXXX), Company Number ((669) 252-XXXX), Emergency Address (55 ALMADEN BLVD, SAN JOSE, California 95113, United States), Personal Emergency Address (Manage), Outbound Caller ID (Jacob XXXXX - (619) 415-XXXX), Country (United States (+1)), Area Code (669), Call Handling, and Business Hours (24 Hours, 7 Days a Week). A blue chat bubble icon is visible in the bottom right corner of the settings panel.

- ✓ Manage **Emergency Address**.
- ✓ Set **Outbound Caller ID**.
- ✓ Create **Business Hours**.

# Configure Zoom Phone

## Settings

✔ Edit **Call Handling**.

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

Device Management  
Room Management  
Phone System Management  
Account Management  
Advanced

Attend Live Training  
Video Tutorials  
Knowledge Base

### Call Handling

Business Hours

Mon	Tue	Wed	Thu
9:00 AM – 6:00 PM	9:00 AM – 6:00 PM	9:00 AM – 6:00 PM	9:00 AM – 6:00 PM
Fri 9:00 AM – 6:00 PM	<a href="#">Edit</a>		

Call Handling [Edit](#)

- Zoom Applications

Call Handling Ring Mode

Simultaneous ▾

Max Wait Time

30 seconds ▾

When a call is not answered

Forward to voicemail ▾

Allow callers to reach an operator

Leave voicemail greeting

Default ▾ [Audio Library](#)

Forward to voicemail

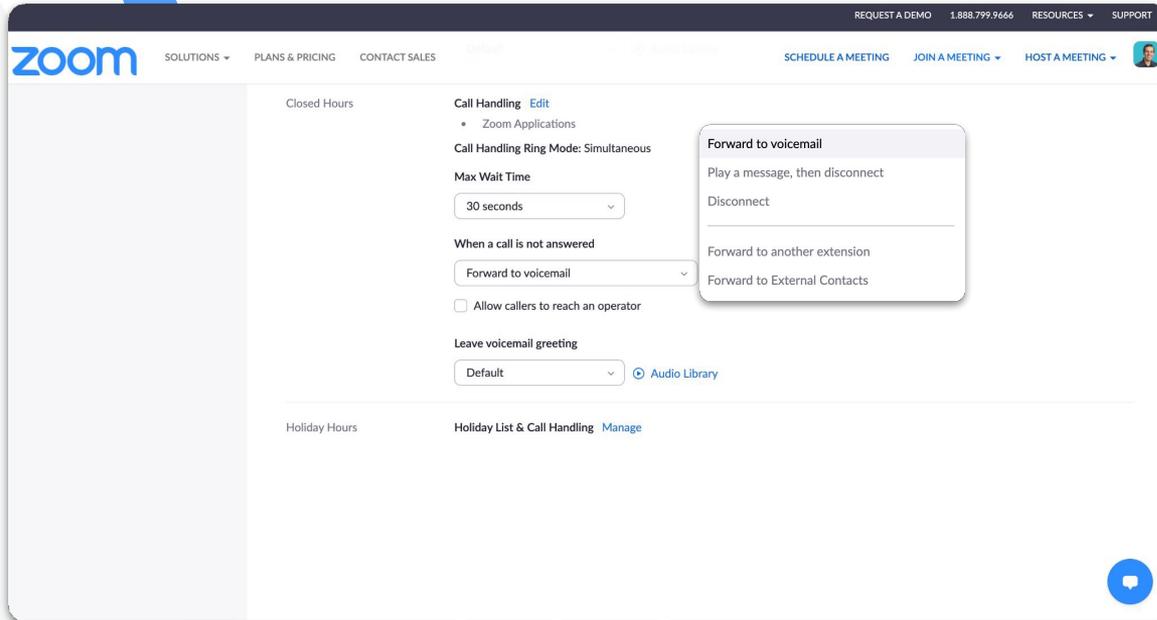
- Play a message, then disconnect
- Disconnect
- Forward to another extension
- Forward to External Contacts

Closed Hours [Call Handling](#) [Edit](#)

# Configure Zoom Phone

## Settings

- ✔ Create **Closed Hours**.



The screenshot displays the Zoom Phone settings page. The top navigation bar includes 'zoom', 'SOLUTIONS', 'PLANS & PRICING', 'CONTACT SALES', and utility links like 'REQUEST A DEMO', '1.888.799.9666', 'RESOURCES', and 'SUPPORT'. The main content area is titled 'Call Handling' and includes sections for 'Closed Hours', 'Call Handling Ring Mode: Simultaneous', 'Max Wait Time' (set to 30 seconds), 'When a call is not answered' (set to 'Forward to voicemail'), and 'Leave voicemail greeting' (set to 'Default'). A dropdown menu is open over the 'Forward to voicemail' option, listing: 'Play a message, then disconnect', 'Disconnect', 'Forward to another extension', and 'Forward to External Contacts'. Below the main settings is a 'Holiday Hours' section with a link to 'Holiday List & Call Handling Manage'. A blue chat icon is visible in the bottom right corner of the interface.

# Configure Zoom Phone

## Voicemail Greeting

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

The screenshot displays the Zoom Admin Console interface. The main content area shows the 'Audio Library' modal, which includes an 'Add Audio' button (highlighted with a red box), a text input field for the audio name, a voice selection dropdown (set to 'American English'), and a message-to-play text area. Below this is an 'Adjust Volume' section with a speaker icon and a volume slider. The 'Add Audio' modal is overlaid on top of the 'Audio Library' modal. The 'Add Audio' modal has three tabs: 'Text to Speech' (highlighted with a red box), 'Record by Computer', and 'Upload'. The 'Text to Speech' tab is active, showing a 'Next' button. The 'Upload' tab is also visible, showing an 'Upload' button and a 'Cancel' button. The background shows the Zoom Admin Console navigation menu and the top header with 'REQUEST A DEMO', '1.888.799.9666', 'RESOURCES', and 'SUPPORT'.

# Configure Zoom Phone

## Delegation

The screenshot displays the Zoom Admin Console interface for configuring a Zoom Phone user. The main page is titled "Delegation & Assistant" and includes a search bar for assigning delegation privileges. A dropdown menu is open, showing a list of users with their names, email addresses, and phone numbers. A modal window is overlaid on the page, showing the details for a delegation to "Shaun PTO ...". The modal includes a "Delete Delegation" button and a section for "Delegation Privileges" with three checked options: "Place Calls", "Answer Calls", and "Pick Up Hold Calls".

- ✓ Click **Add**.
- ✓ Enter in the user name and click **Send Invite**.
- ✓ Choose **Delegation Privileges**.

# Configure Zoom Phone

## Delegation

- ✓ When a new delegation comes in, click **View**.
- ✓ Select **Accept**.

The screenshot displays the Zoom Admin Console interface for configuring a user's delegation and assistant settings. The top navigation bar includes links for 'REQUEST A DEMO', '1.888.799.9666', 'RESOURCES', and 'SUPPORT'. The main content area is titled 'Delegation & Assistant' and is divided into two sections: 'Delegation' and 'Assistant for'.

**Delegation Section:**

- Assign delegation privileges to:** A list of users assigned to the delegation, including 'Tyler' and 'Collin (Pending)'. Each user has an 'x' icon to remove them.
- Delegation Privileges:** A set of checkboxes for 'Place Calls', 'Answer Calls', and 'Pick Up Hold Calls', all of which are currently checked.
- Delete Delegation:** A button to remove the current delegation configuration.

**Assistant for Section:**

- Assistant for:** A dropdown menu showing 'Tyler (Site: Main Site)' as the selected assistant.
- Able to Place Calls:** A checkbox indicating the assistant's permissions.

**Delegation Request Notification:**

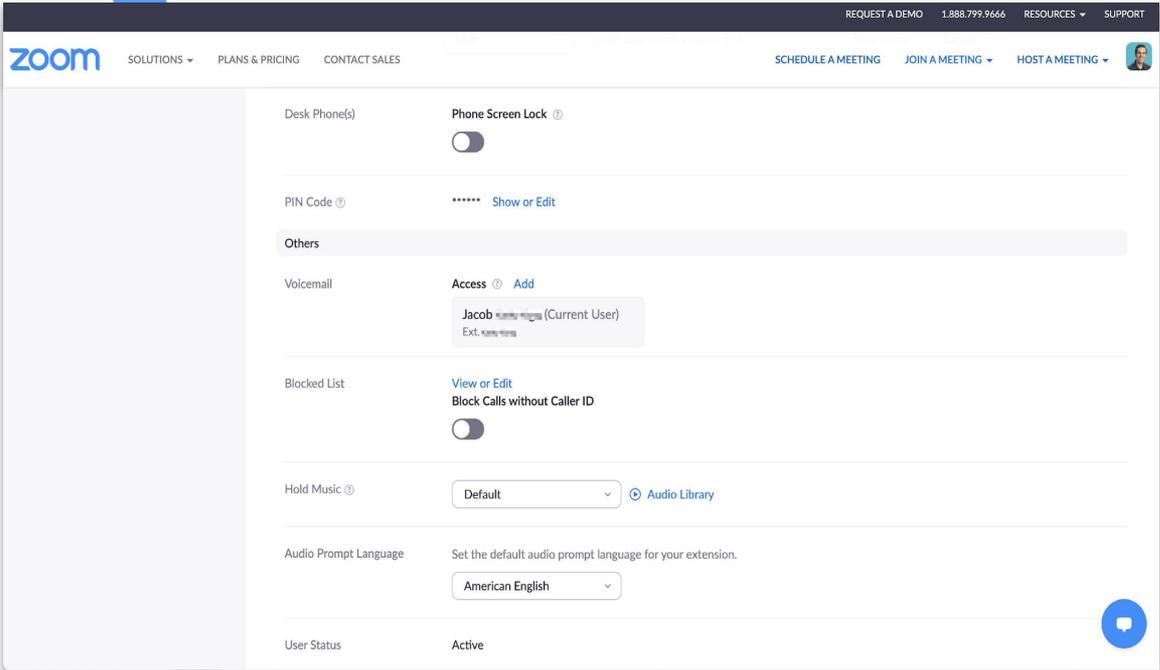
A notification box in the bottom right corner displays the text: 'Delegation Request: You have a new delegation request.' Below the text is a 'View' link and a blue speech bubble icon.

**Accept request Modal:**

A modal dialog is open in the foreground with the title 'Accept request' and the text: 'Do you want to accept Tyler's delegation request?'. At the bottom of the modal are two buttons: 'Cancel' and 'Accept'.

# Configure Zoom Phone

## Other Settings



- ✓ Voicemail Access
- ✓ Blocked List
- ✓ Hold Music
- ✓ Language

# Configure Zoom Phone

## Other Settings

Note: relevant only if physical phone device

- ✔ Manage **Keys & Positions**

The screenshot shows the Zoom Admin console interface. The top navigation bar includes 'zoom', 'SOLUTIONS', 'PLANS & PRICING', 'CONTACT SALES', 'SCHEDULE A MEETING', 'JOIN A MEETING', and 'HOST A MEETING'. The left sidebar lists 'PERSONAL' (Profile, Meetings, Webinars, Personal Audio Conference, Phone, Recordings, Settings) and 'ADMIN' (Dashboard, User Management, Room Management, Phone System Management, Account Management, Advanced). The main content area is titled 'Phone > Settings > Keys & Positions'. It contains a 'Manage Key' button and a table with columns: Key, Key Type, Line Subscription, Alias, and Outbound Caller ID. A modal window titled 'Manage Key' is overlaid, showing a table with columns: Key, Key Type, Line Subscription, Alias (Optional), and Outbound Caller ID. A yellow warning banner at the top of the modal states 'Modifying the Position will cause the device to resync.' The modal table shows three rows: Key 1 (Line type, with a form to enter an alias and a dropdown for 'Same as Number'), Key 2 (Set Key), and Key 3 (Set Key).

Phone > Settings > Keys & Positions

### Keys & Positions

Set up keys and edit key positions for desk phones. [Learn More](#)  
The shared device will have separate Keys & Positions setting in the device detail page.

[Manage Key](#)

Key	Key Type	Line Subscription	Alias	Outbound Caller ID
1	Line	Ext. (619) 415- Jacob		Same as Number

### Manage Key

Modifying the Position will cause the device to resync.

Key	Key Type	Line Subscription	Alias (Optional)	Outbound Caller ID	
1	Line	Ext. (619) 415- Jacob	<input type="text" value="Enter Alias"/>	Same as Number	↑ ↓
2	Set Key				↑ ↓
3	Set Key				↑ ↓

# Configure Zoom Phone

## 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

The screenshot shows the Zoom Admin Console interface. The left sidebar contains navigation options: Profile, Meetings, Webinars, Personal Audio Conference, Recordings, Settings, Account Profile, and Reports. The main content area displays the 'Profile' settings. The 'Calendar and Contacts Integration' section is highlighted with a red box and contains the text: 'We support the following services: Google Calendar, Microsoft Exchange, and Microsoft Office 365'. Below this text is a button labeled 'Configure Calendar and Contacts Service'.

Language	English	<a href="#">Edit</a>
Date and Time	Time Zone (GMT-8:00) Pacific Time (US and Canada)	<a href="#">Edit</a>
	Date Format mm/dd/yyyy Example: 08/15/2011	
	Time Format × Use 24-hour time	
Calendar and Contacts Integration	We support the following services: Google Calendar, Microsoft Exchange, and Microsoft Office 365	
	<a href="#">Configure Calendar and Contacts Service</a>	
Sign-In Password	*****	<a href="#">Edit</a>
Host Key	***** <a href="#">Show</a>	<a href="#">Edit</a>
Two-factor Authentication	Turned off	<a href="#">Turn on</a>
Signed-In Device	<a href="#">Sign Me Out From All Devices</a>	

# Desktop Client

## Using Zoom Phone

# Zoom Desktop App

## Home Screen Settings



zoom

Email

Password

[Forgot?](#)

Sign In

Keep me signed in

or sign in with



SSO



Apple



Google



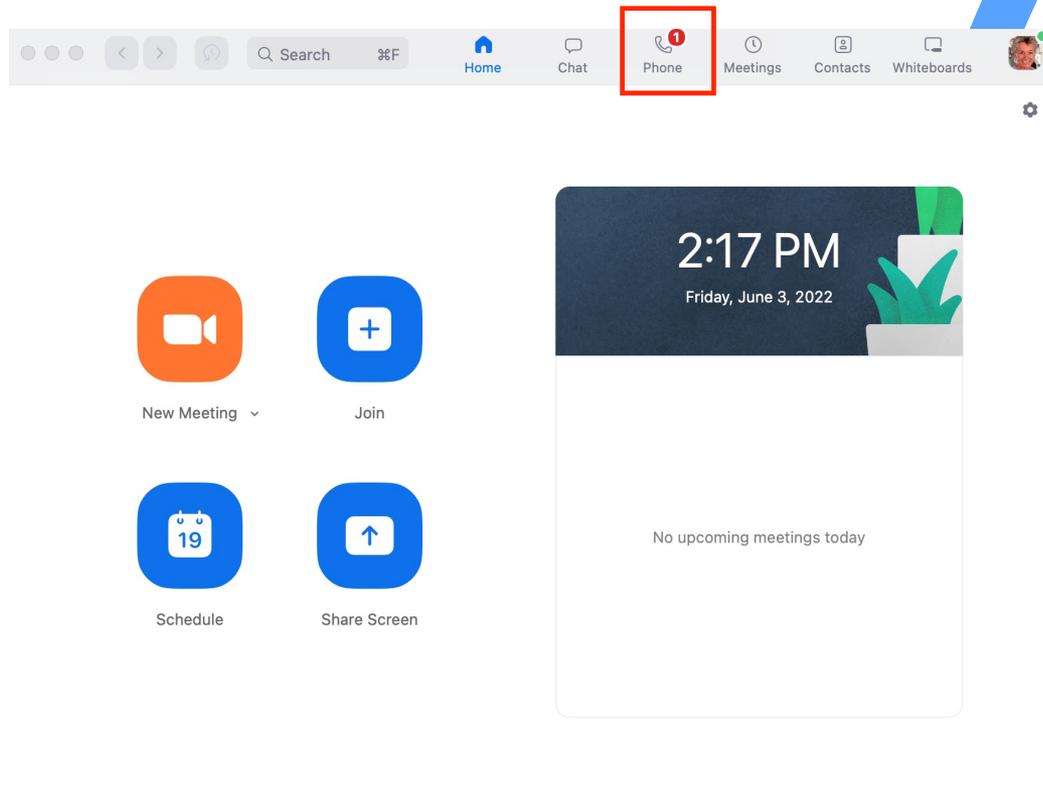
Facebook

[< Back](#)

[Sign Up](#)

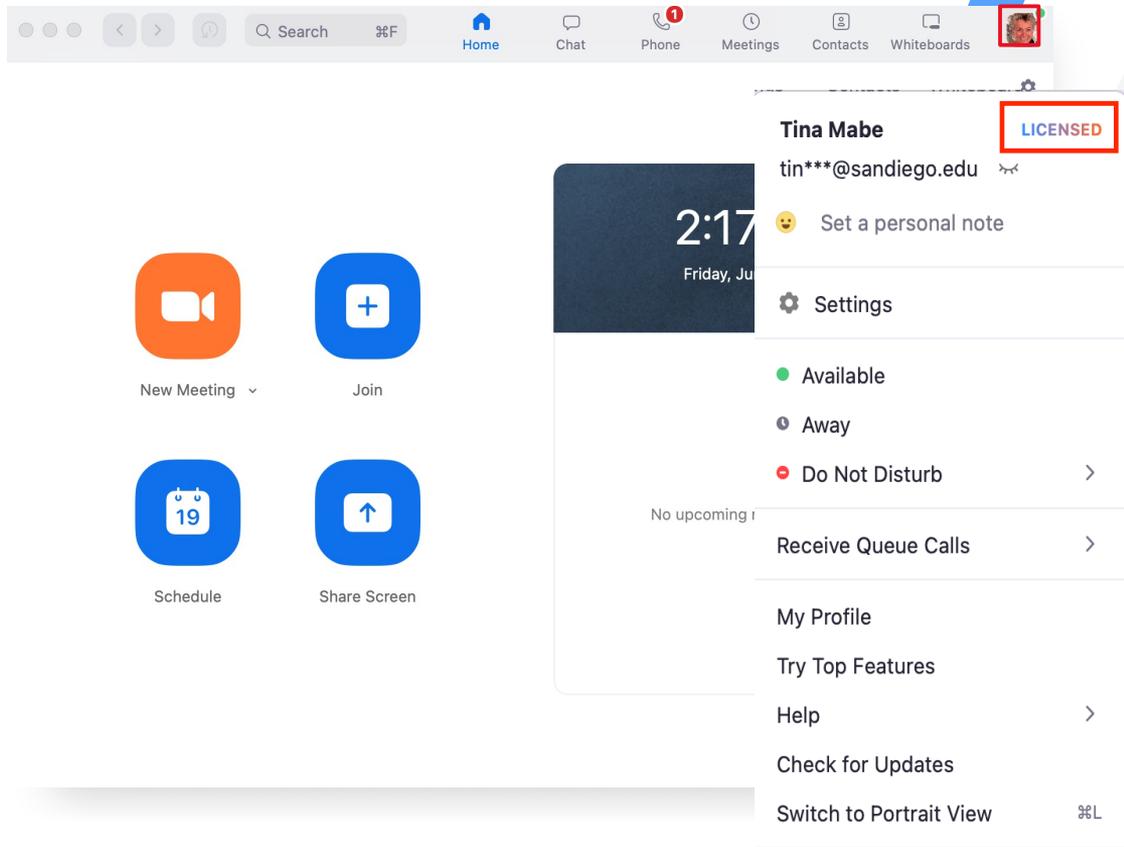
# Zoom Desktop App

## Home Screen Settings



# Zoom Desktop App

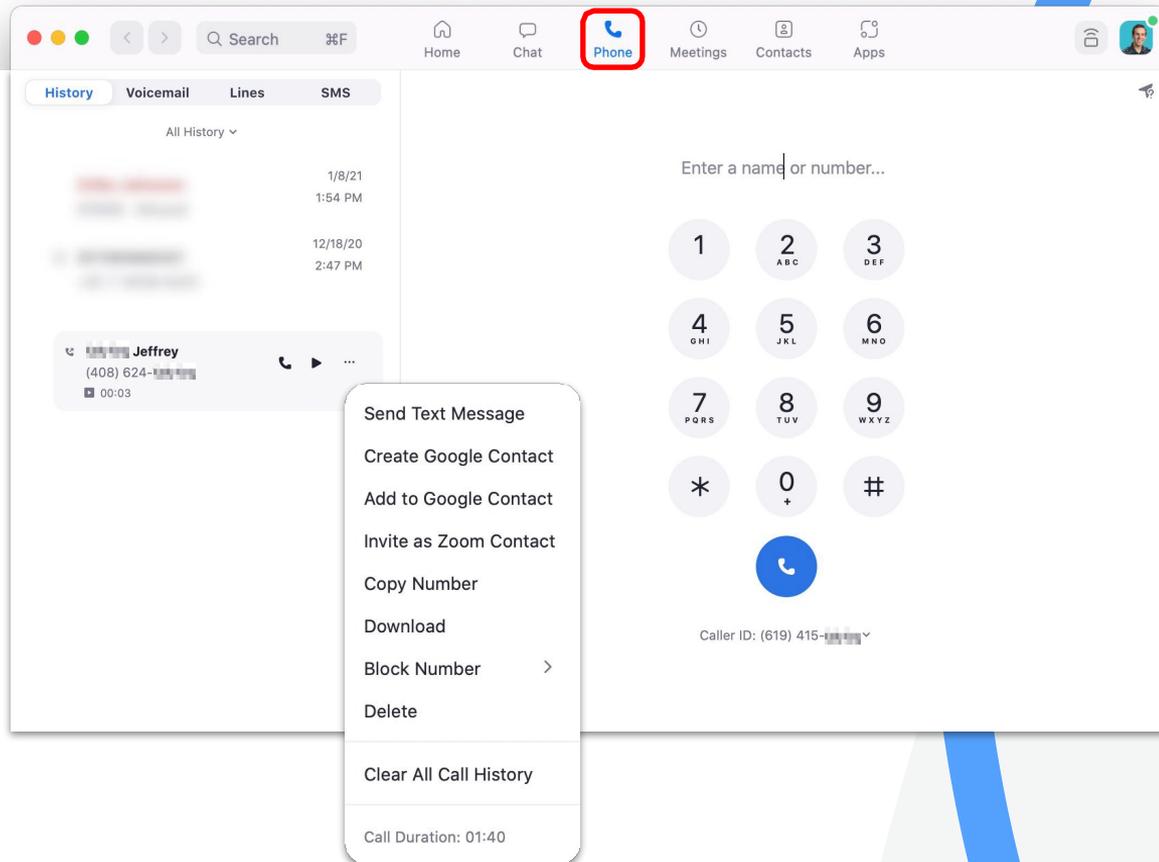
## Home Screen Settings



# Zoom Desktop App

## History

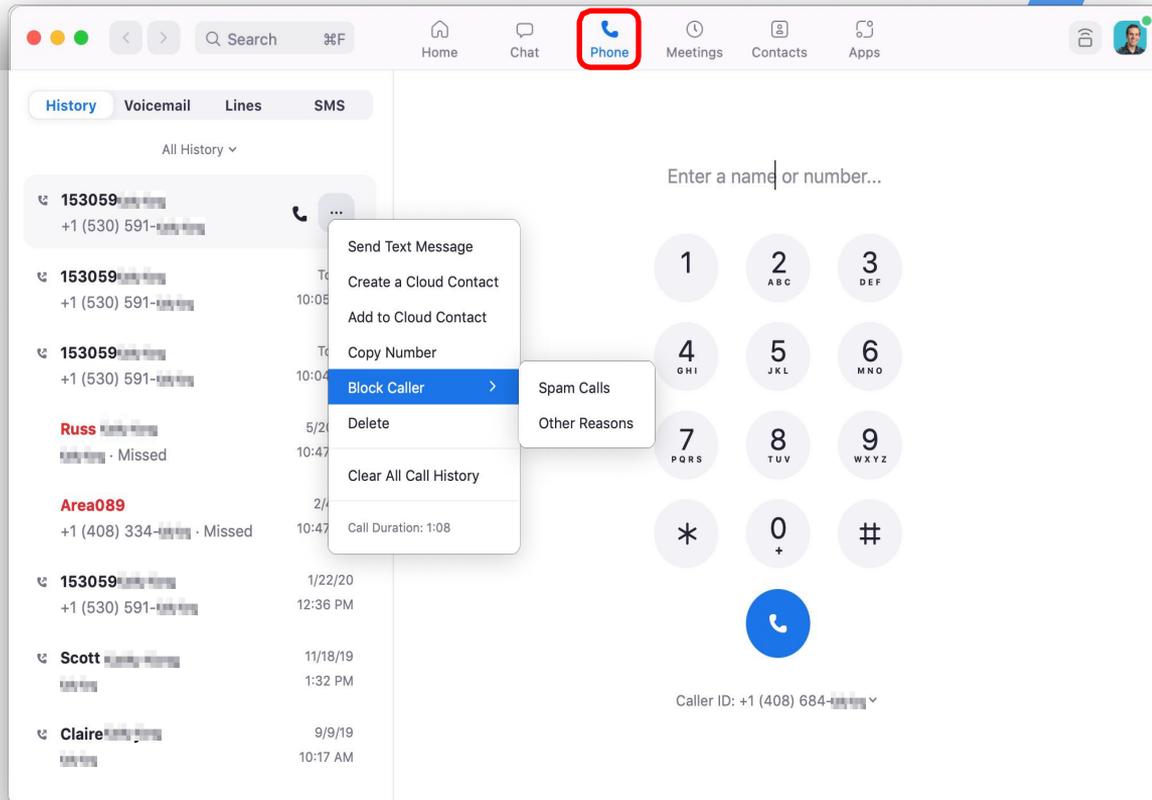
- ✓ Send **Text** Message
- ✓ Create **Contact**
- ✓ **Copy** Number
- ✓ **Block** Number
- ✓ **Clear** Call History



# Zoom Desktop App

## Block Caller

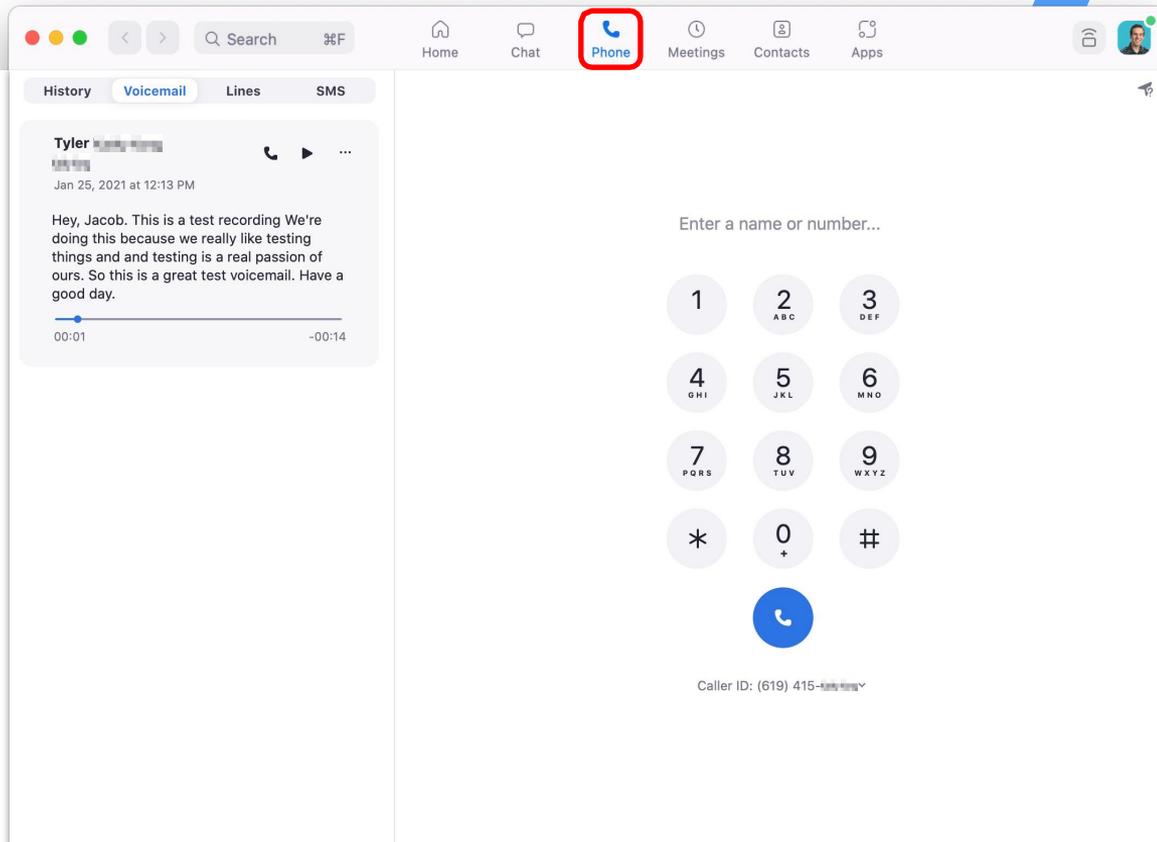
- ✓ Click ....
- ✓ Select **Block Caller**.
- ✓ Choose **Spam Calls** or **Other Reasons**.



# Zoom Desktop App

## Voicemail

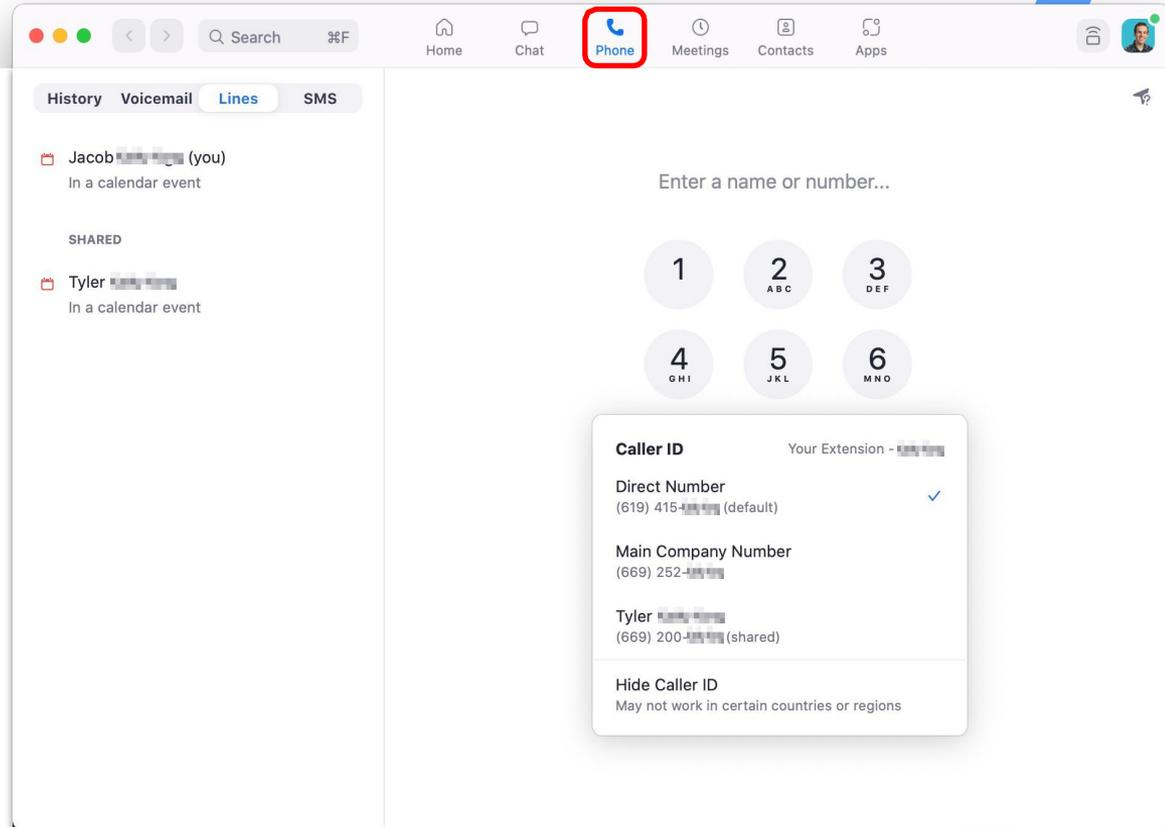
- ✓ Click the **Phone** icon to call back.
- ✓ Click the **Play** icon to listen to the voicemail.
- ✓ Select **...** for more options.



# Zoom Desktop App

## Lines

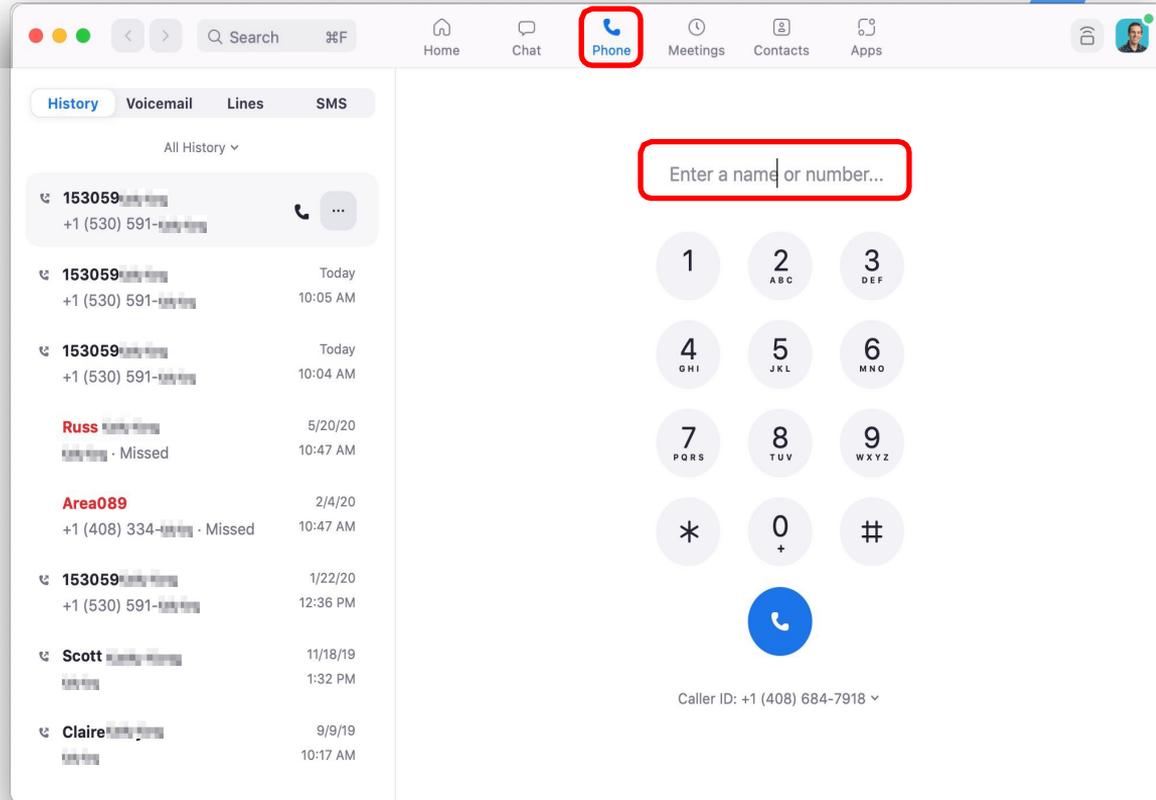
- ✓ Click **v** next to caller ID to choose what line you would like to call out on.
- ✓ Then enter a name or number.
- ✓ Place the call by pressing the **phone icon**.
  - If you have any shared lines they will show on the menu on the left.
  - The users presence will also show to the left of their name.



# Zoom Desktop App

## Placing a Call

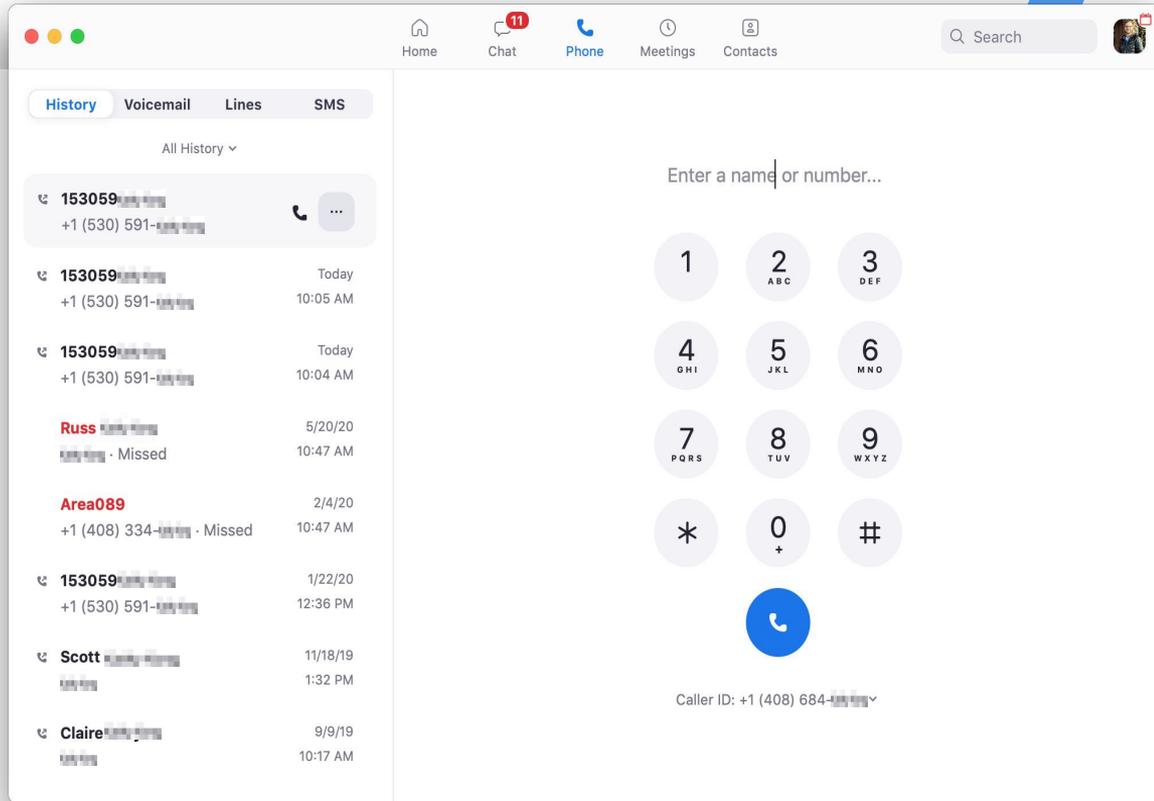
- ✓ Start typing a name or number to bring up your **contacts list**.
- ✓ You can also dial directly from the **keypad**.



# Zoom Desktop App

## Searching for Contacts

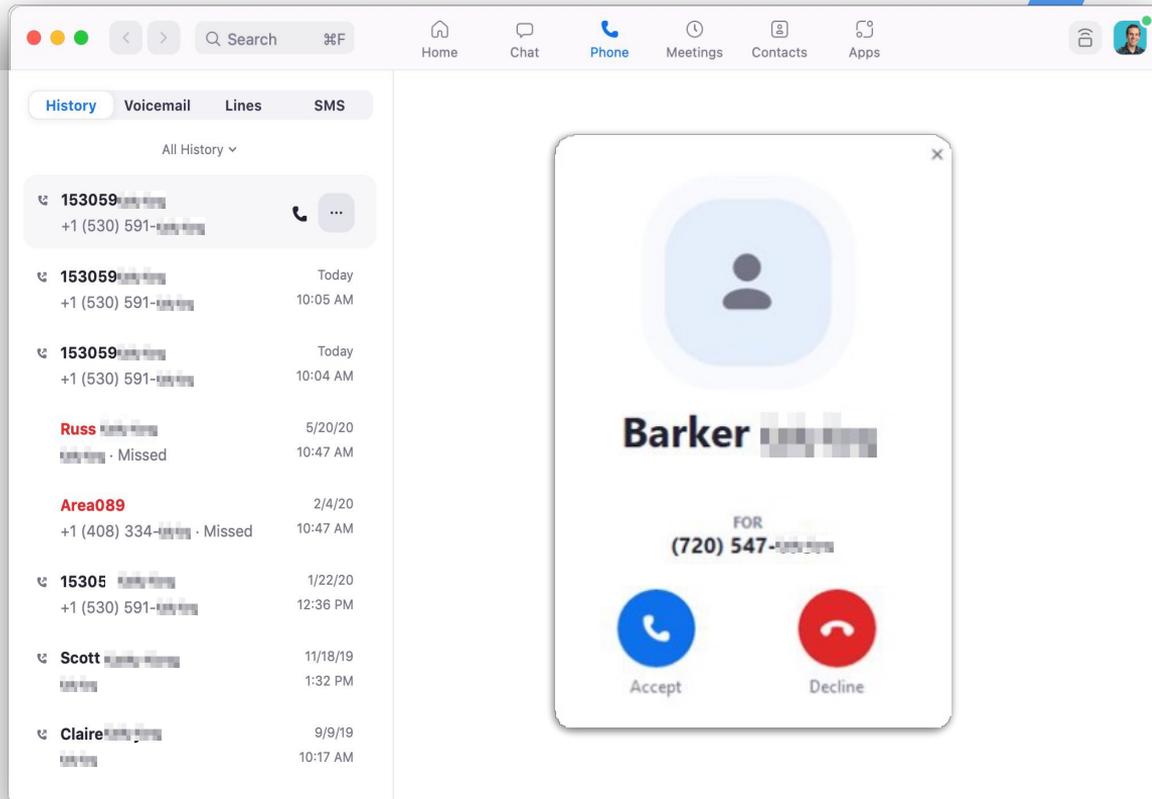
- ✓ Enter a name or number in the search field
- ✓ This will bring up your contacts list.
- ✓ Click the contact from the dropdown menu to call the individual.



# Zoom Desktop App

## Incoming Call

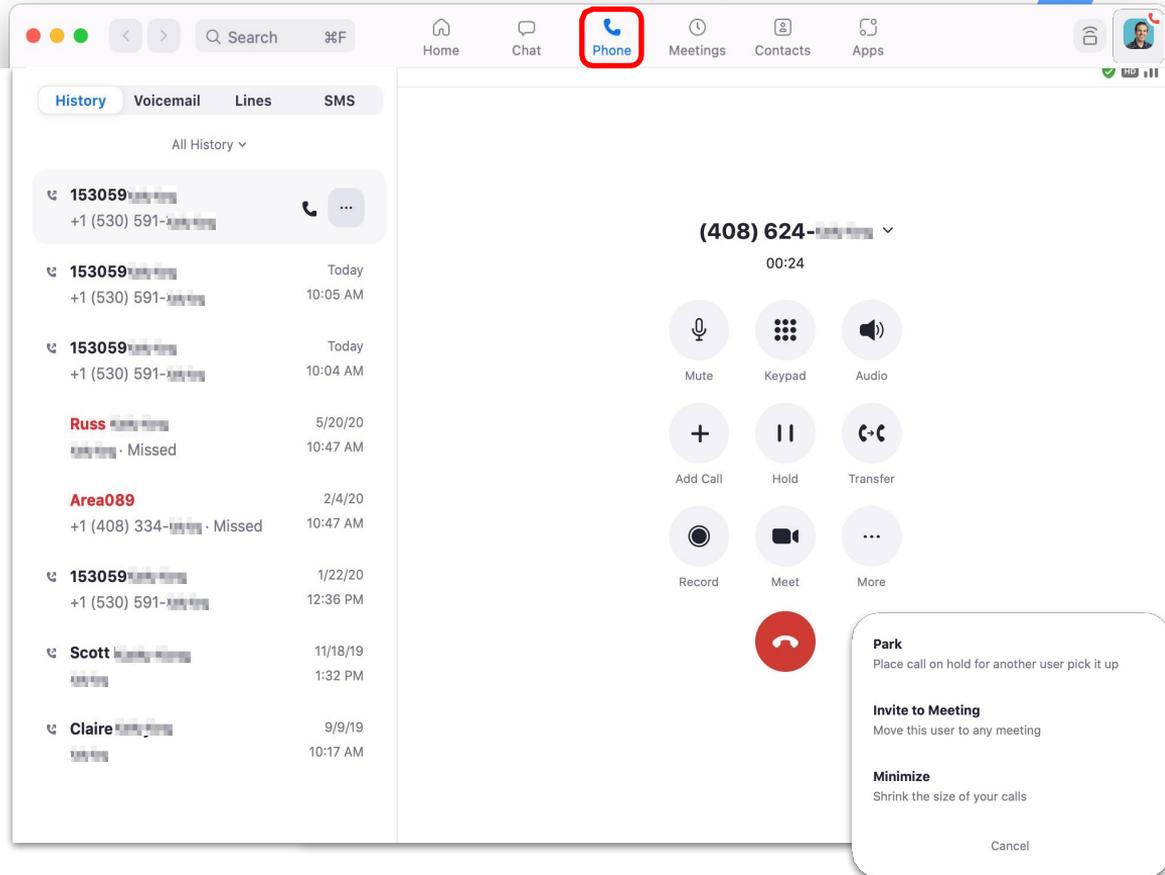
- ✓ When someone calls you, a pop up **notification** will appear.
- ✓ Use the pop up to see who is calling before you answer.
- ✓ The **For** section will show who the caller is trying to reach:
  - Your personal line
  - Someone for whom you are a delegate
  - Call Queues you're a member of
  - Your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



# Zoom Desktop App

## 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.



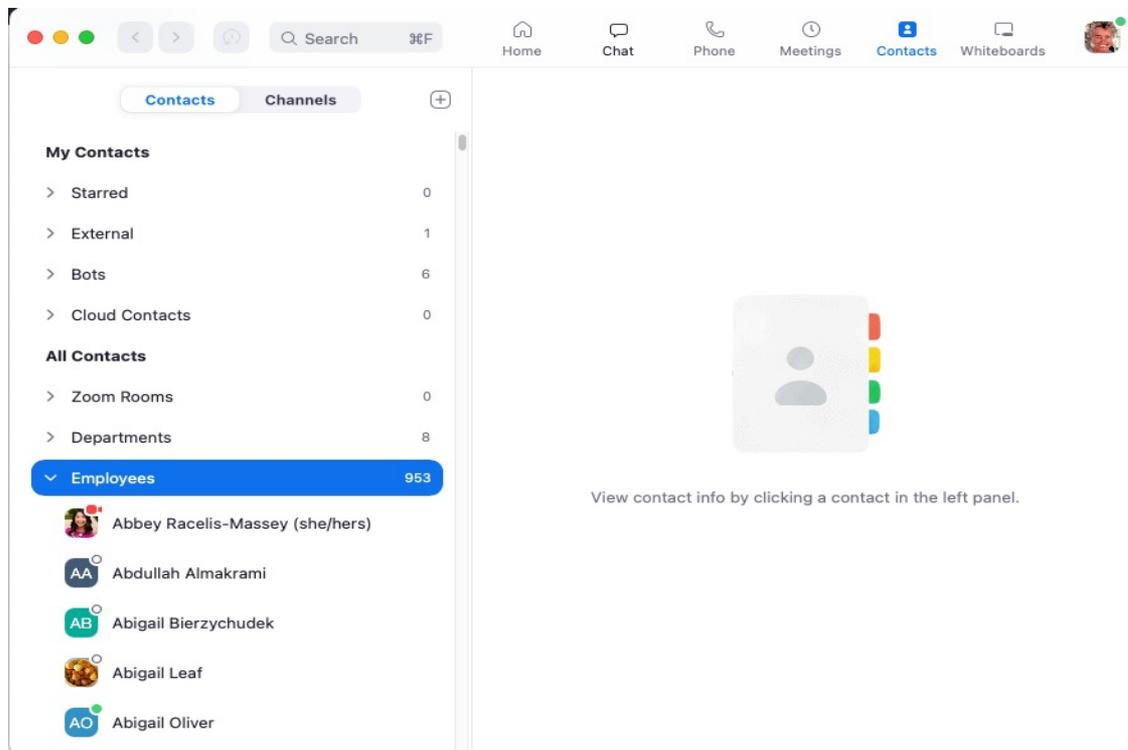
# Zoom Desktop App

## Contacts

The screenshot displays the Zoom Desktop App interface. At the top, there is a navigation bar with icons for Home, Chat, Phone, Meetings, Contacts (highlighted), and Whiteboards. Below the navigation bar, there are two tabs: 'Contacts' (selected) and 'Channels'. The 'Contacts' panel is divided into two sections: 'My Contacts' and 'All Contacts'. The 'My Contacts' section includes 'Starred' (0), 'External' (1), 'Bots' (6), and 'Cloud Contacts' (0). The 'All Contacts' section includes 'Zoom Rooms' (0), 'Departments' (8), 'Employees' (954, highlighted), 'Imported Contacts' (2), and 'Unassigned' (874). The main panel on the right shows a placeholder for a contact card with a person icon and a vertical bar of colored tabs (red, yellow, green, blue). Below the placeholder, there is a text instruction: 'View contact info by clicking a contact in the left panel.'

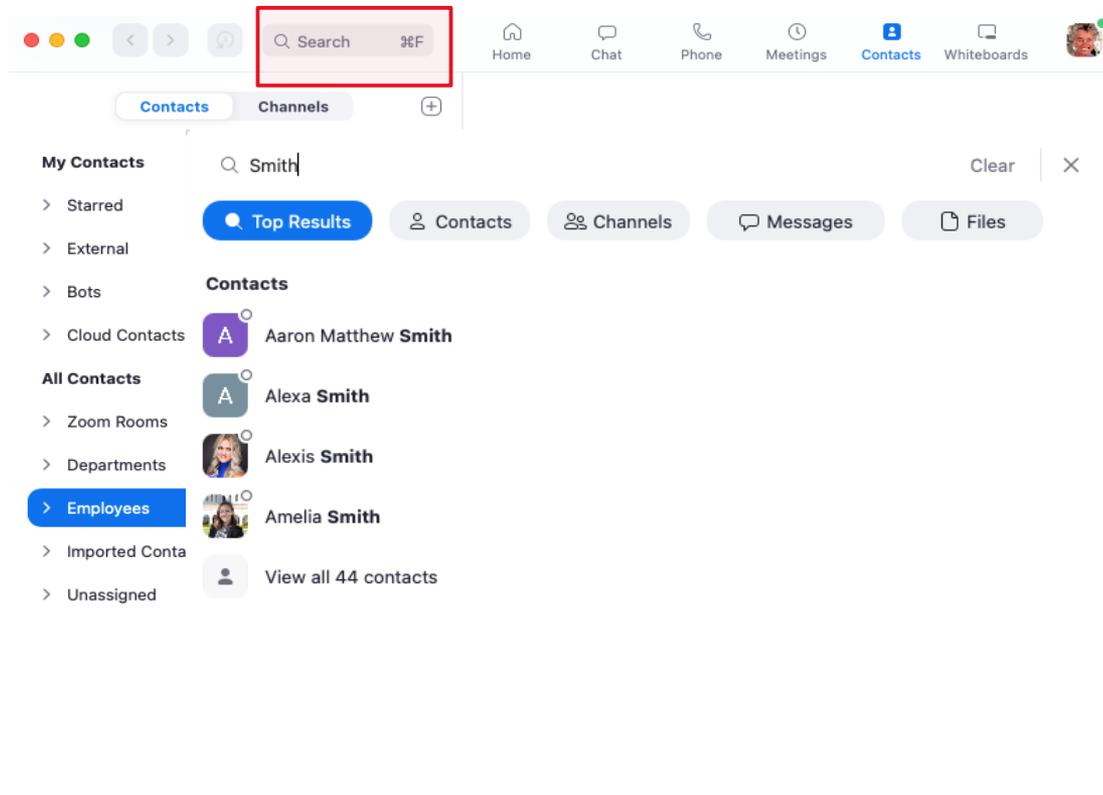
# Zoom Desktop App

## Contacts



# Zoom Desktop App

## Contacts

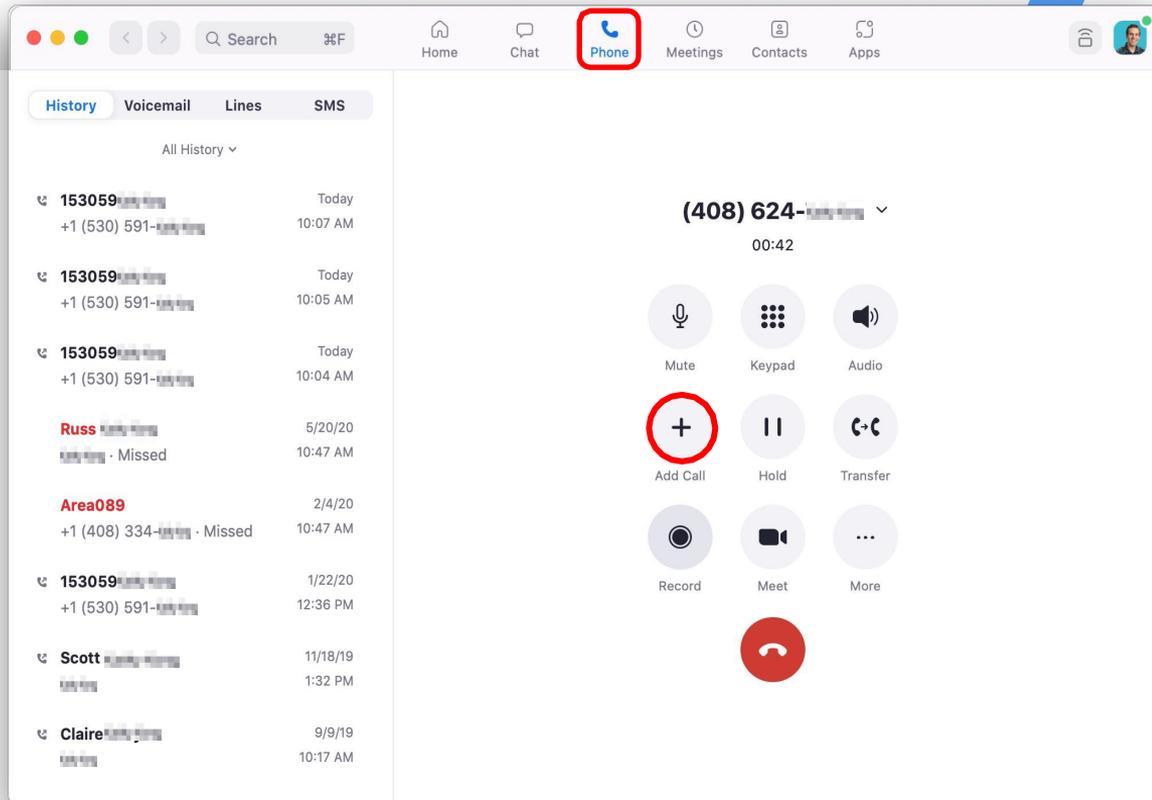


# Active Call Walkthroughs

# Zoom Desktop App

## Add a Caller

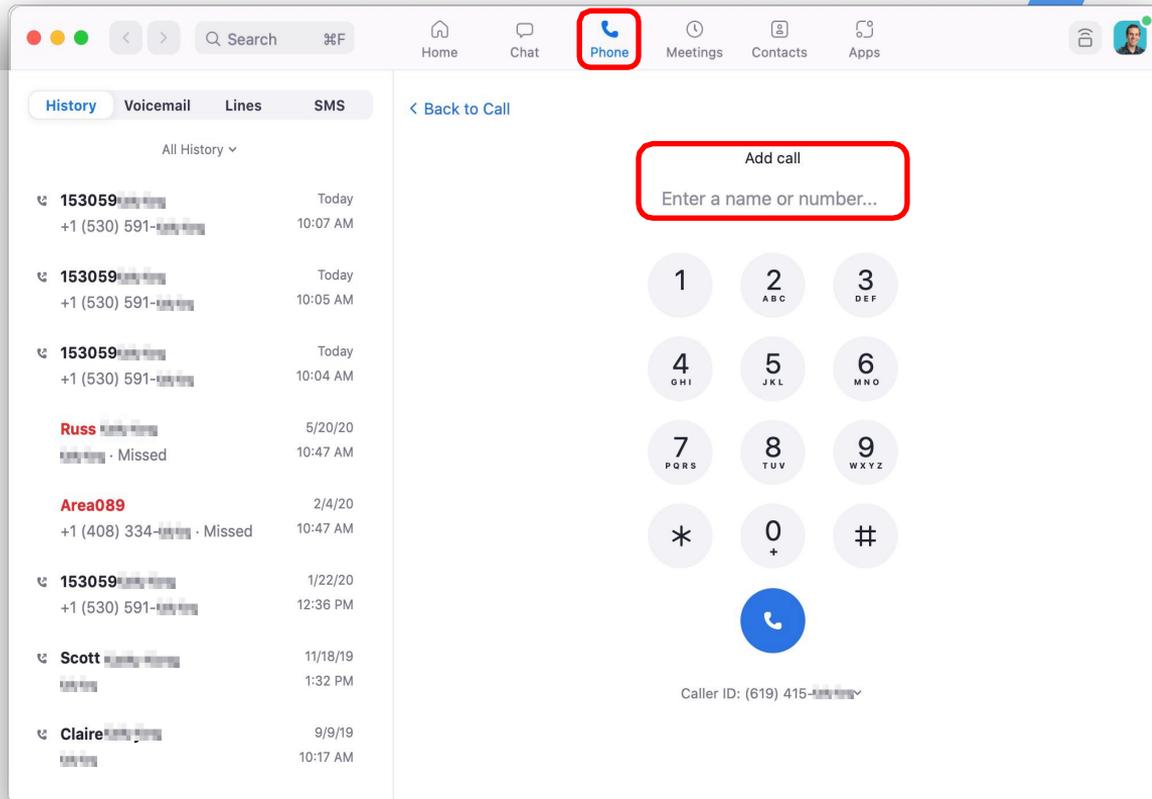
✓ Click **Add Call**.



# Zoom Desktop App

## Add a Caller

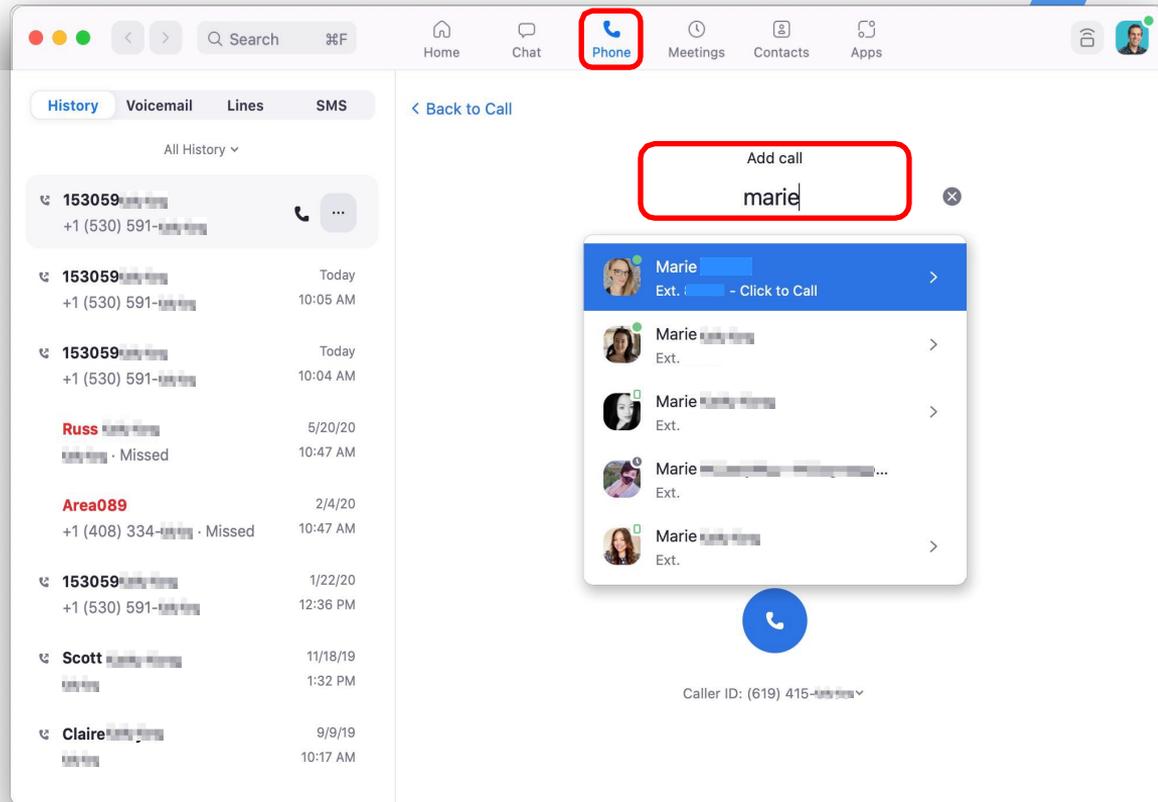
- ✓ Search for a contact or use the keypad to dial.



# Zoom Desktop App

## Add a Caller

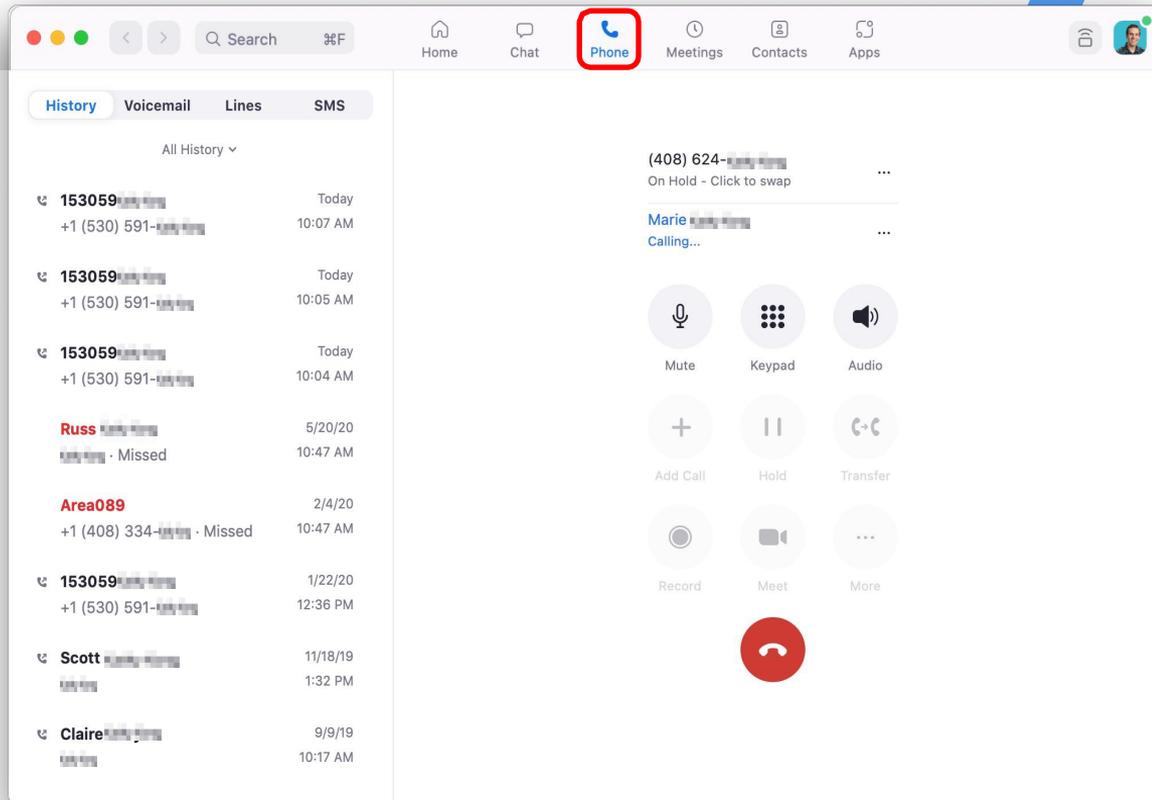
✔ Select the caller to add in.



# Zoom Desktop App

## Add a Caller

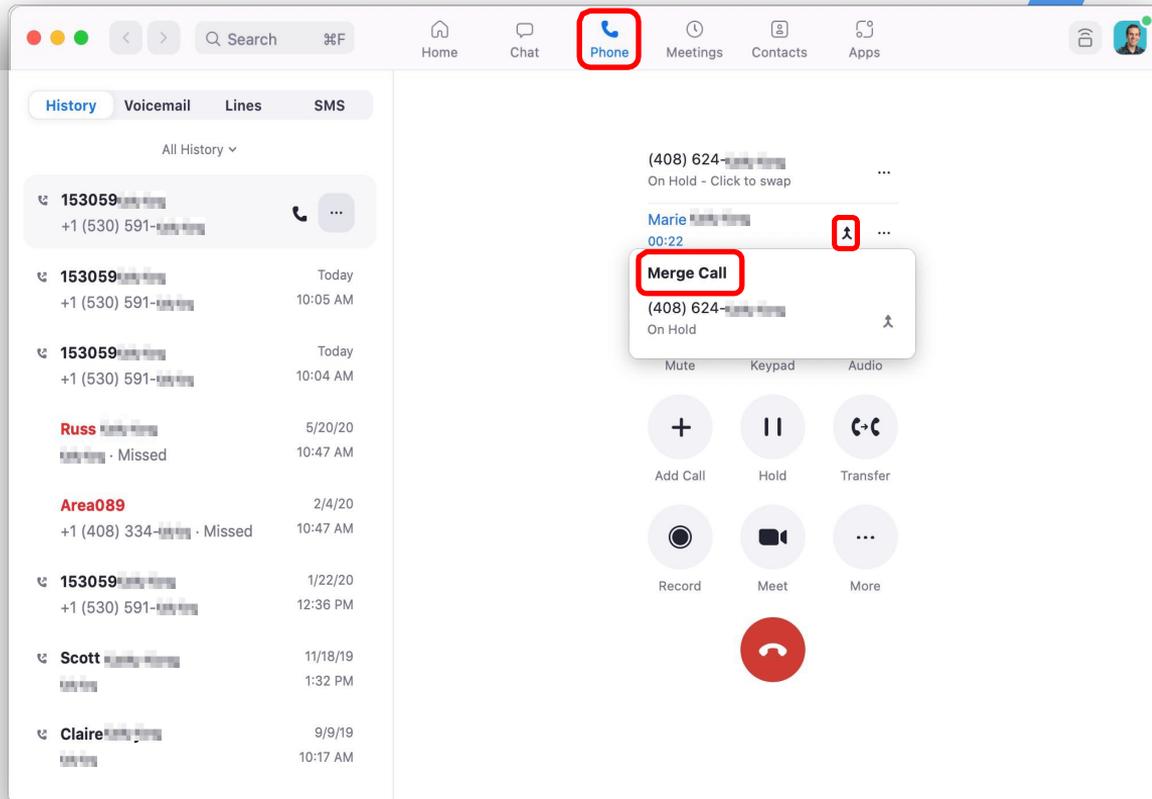
 Wait for an answer.



# Zoom Desktop App

## Add a Caller

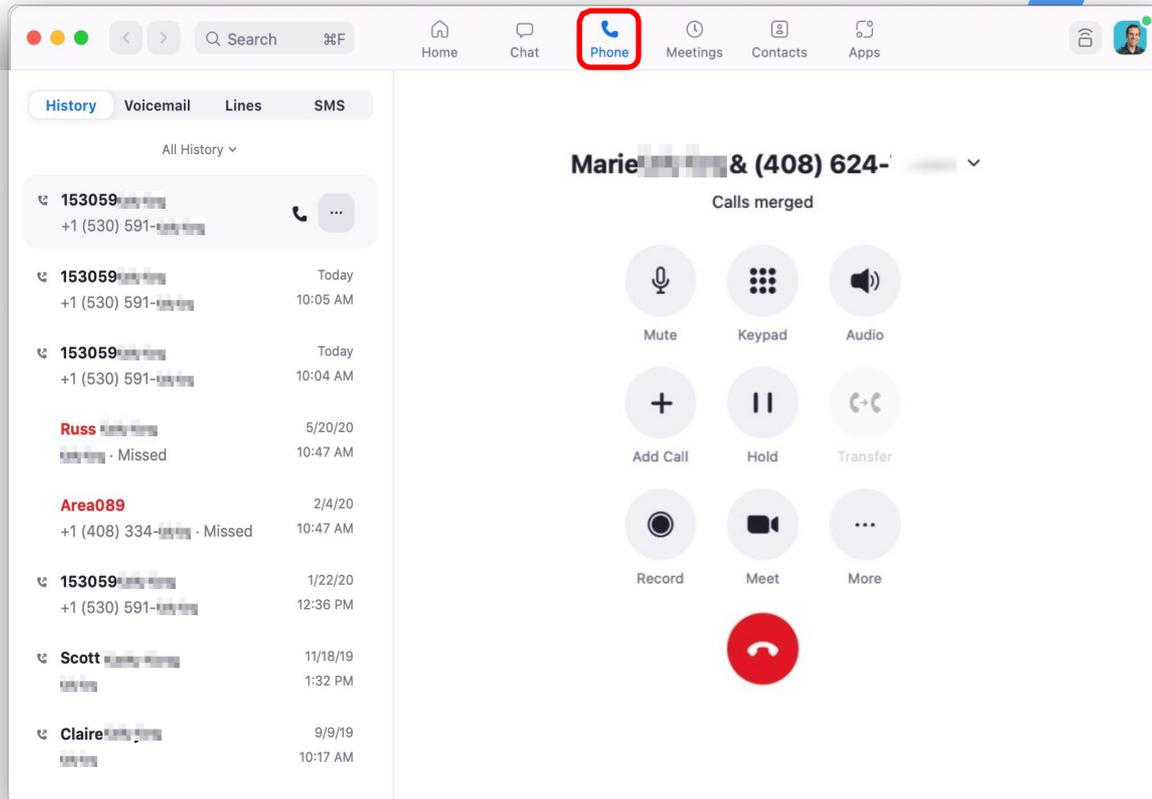
✓ Click **Merge Call**.



# Zoom Desktop App

## Add a Caller

- ✓ See both contacts listed.

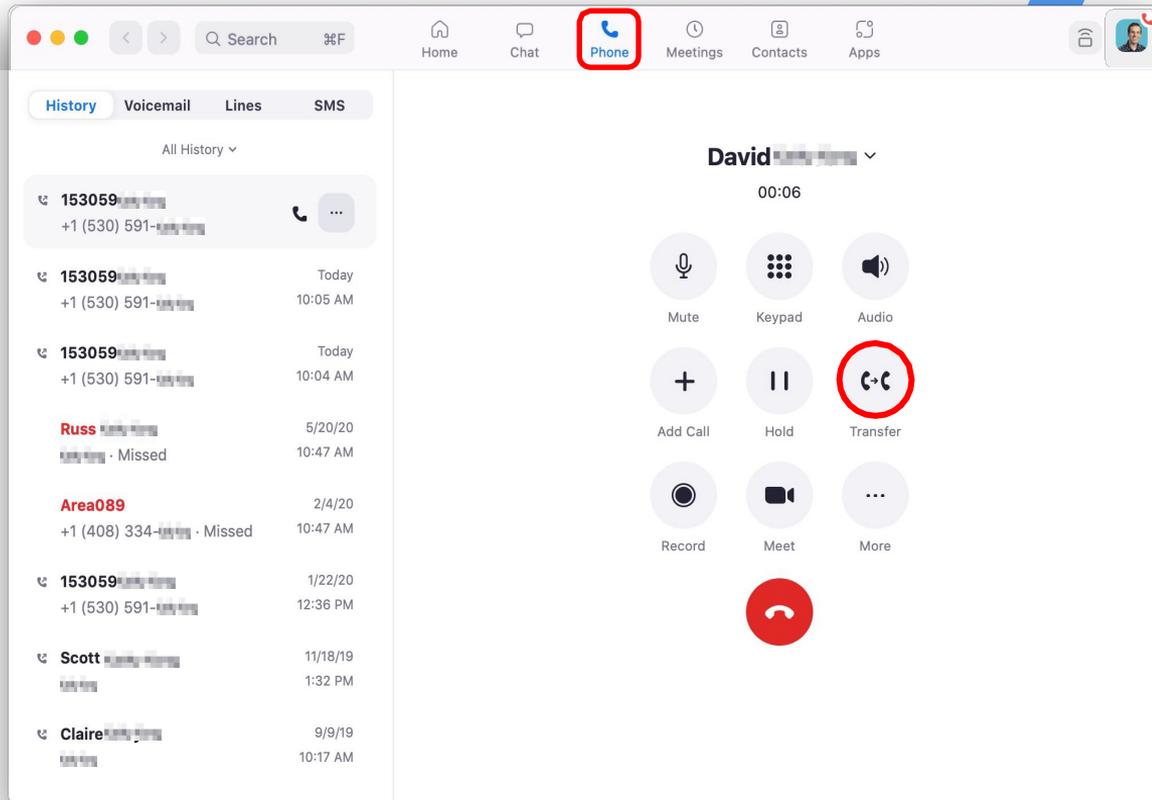


# Zoom Desktop App

## Transfer



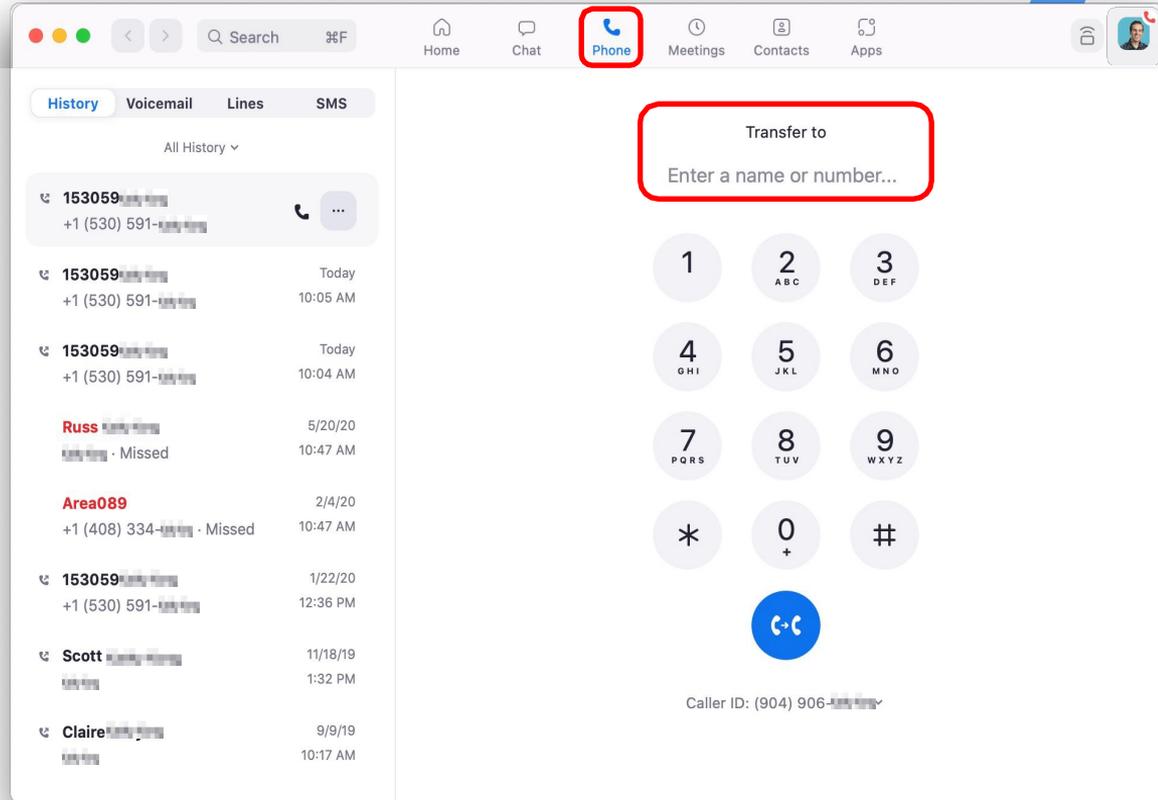
Click **Transfer** from within your active call.



# Zoom Desktop App

## Transfer

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

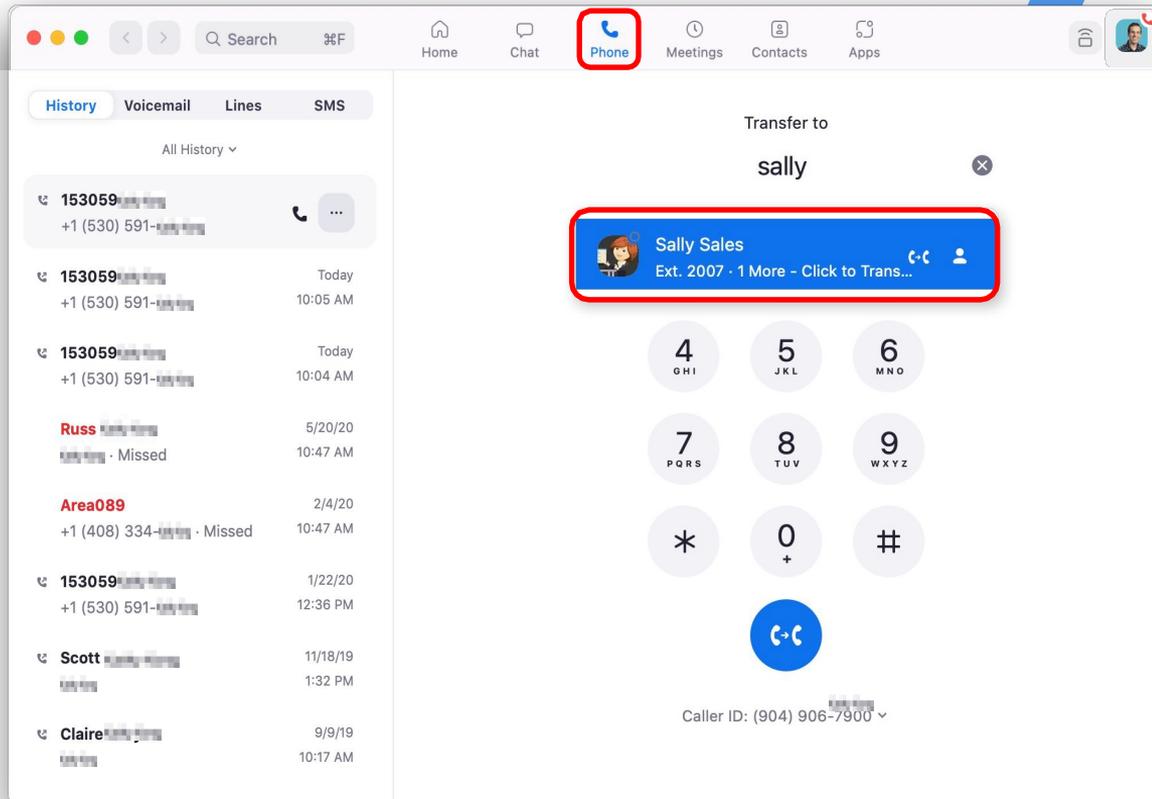


# Zoom Desktop App

## Transfer



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

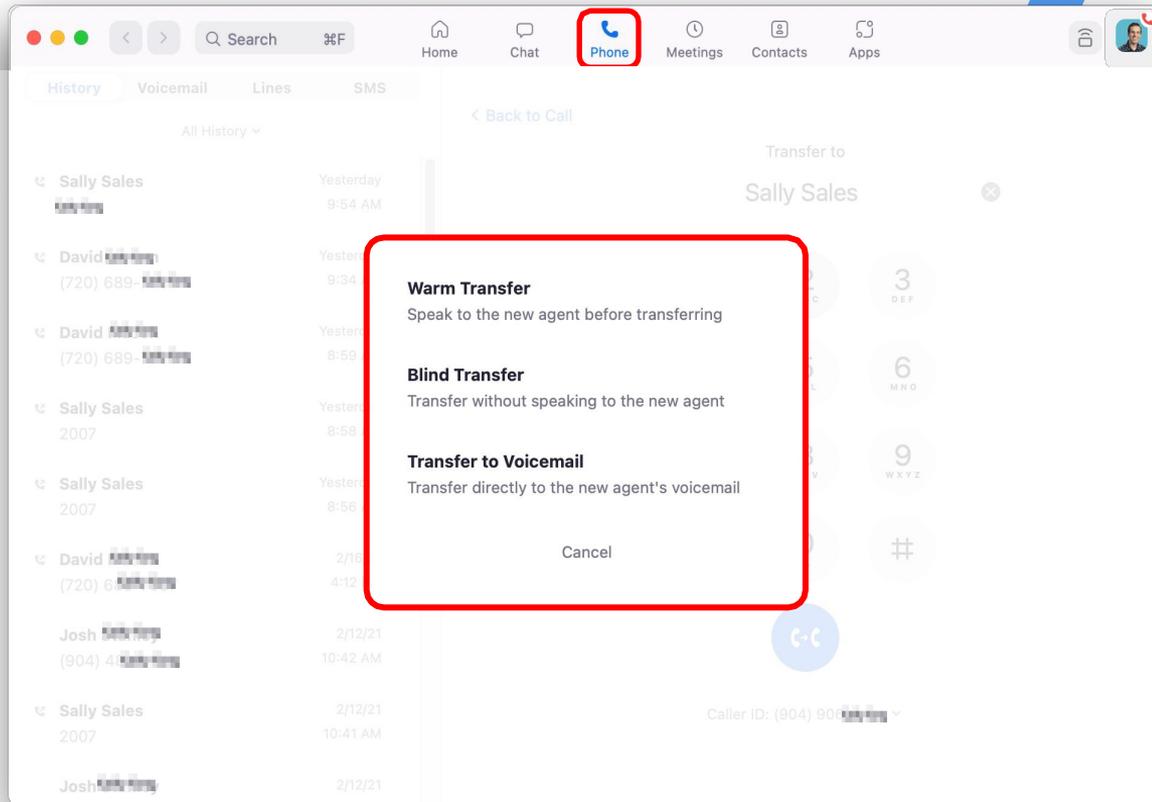


# Zoom Desktop App

## Transfer

✓ Choose how you want to transfer the call.

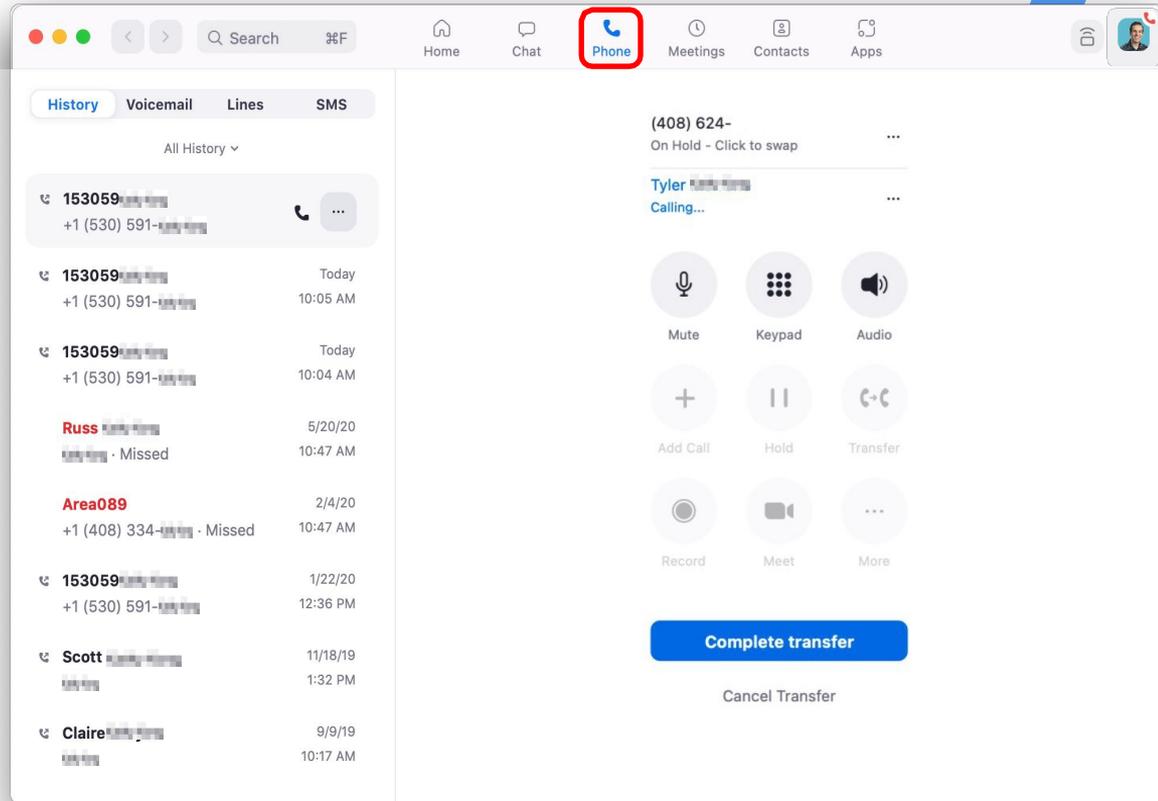
- Warm Transfer
- Blind Transfer
- Transfer to Voicemail



# Zoom Desktop App

## 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.

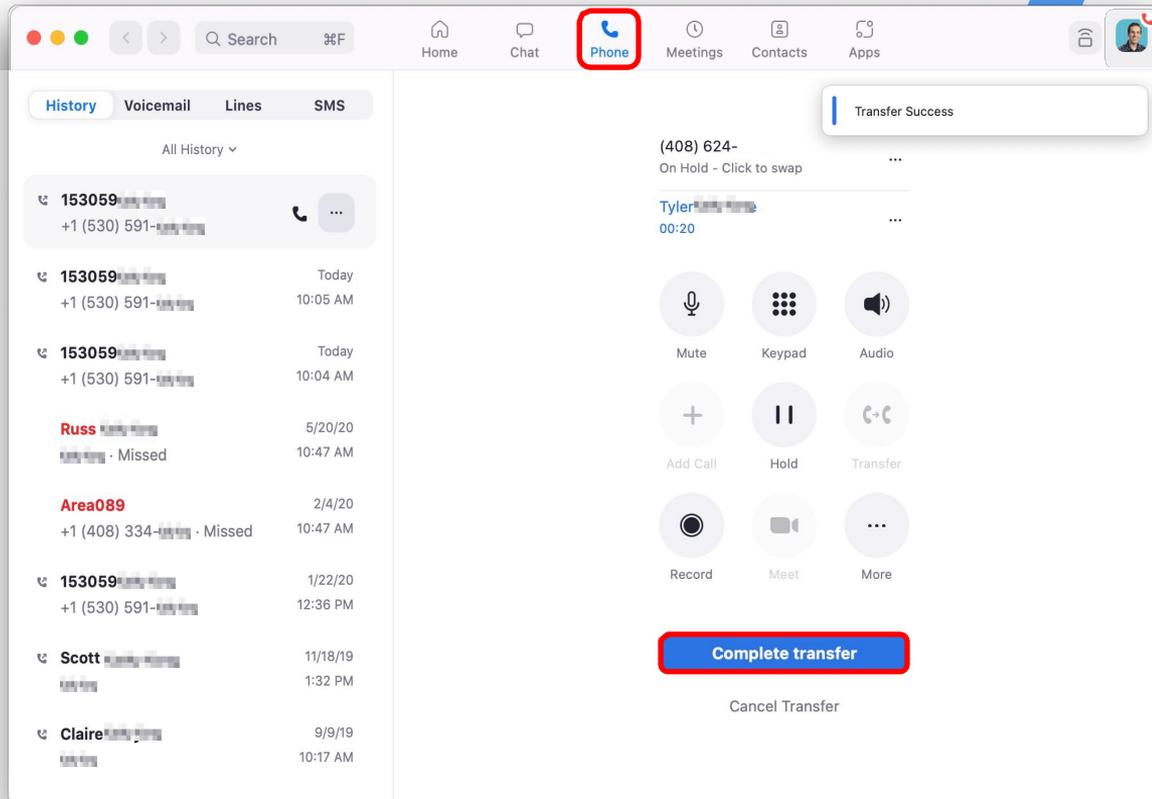


# Zoom Desktop App

## Warm Transfer



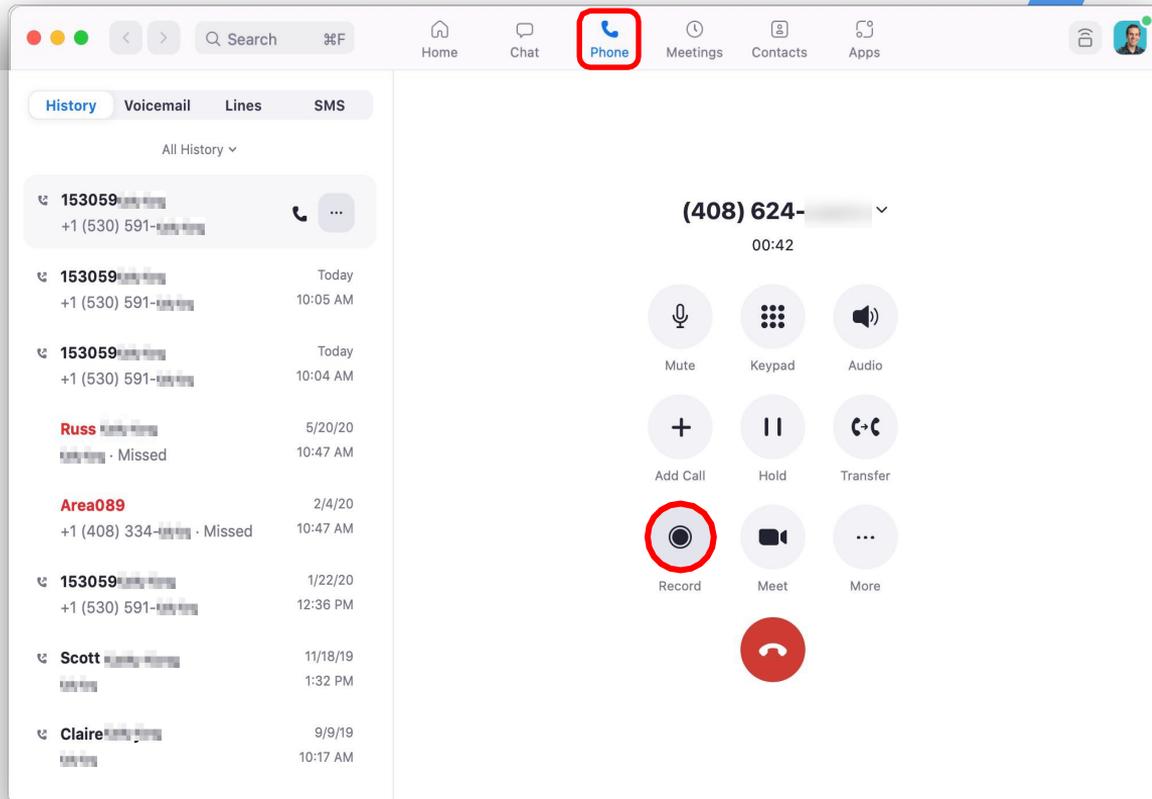
Click **Complete Transfer** to transfer the call and you will receive a notification informing that the transfer was successful.



# Zoom Desktop App

## Record

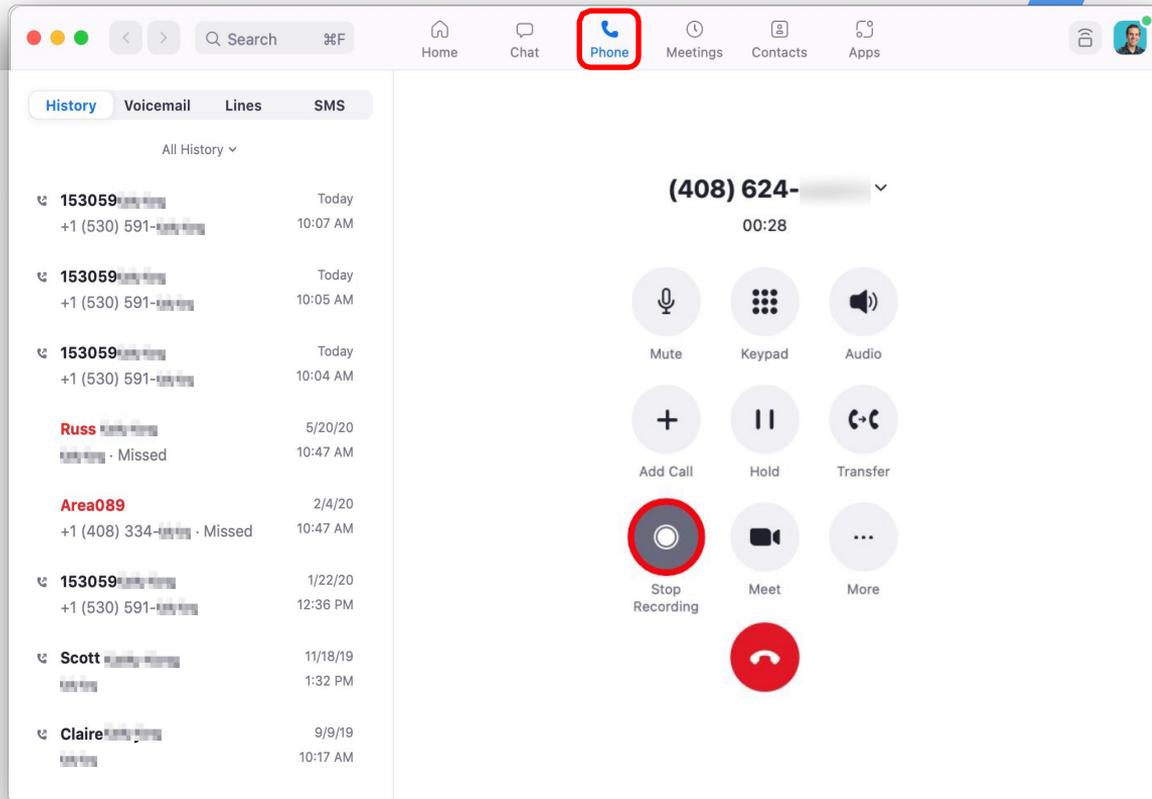
- ✓ Click **Record**.
- ✓ An audio message will notify that the call is being recorded.



# Zoom Desktop App

## Record

- ✓ Click **Stop Recording**.
- ✓ An audio message will notify that the recording has stopped.



# Status



## 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



## In a Calendar Event

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.

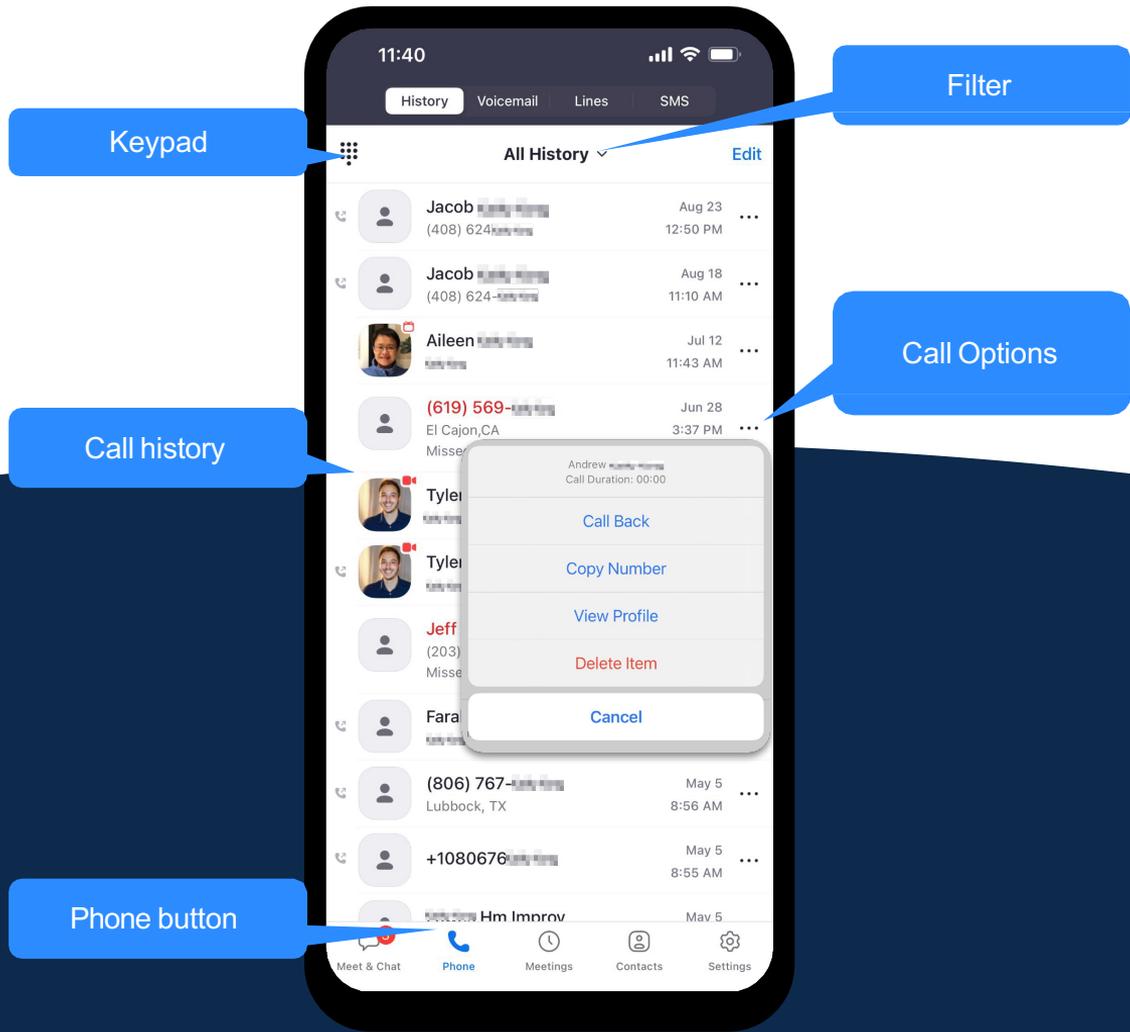


## On a Call

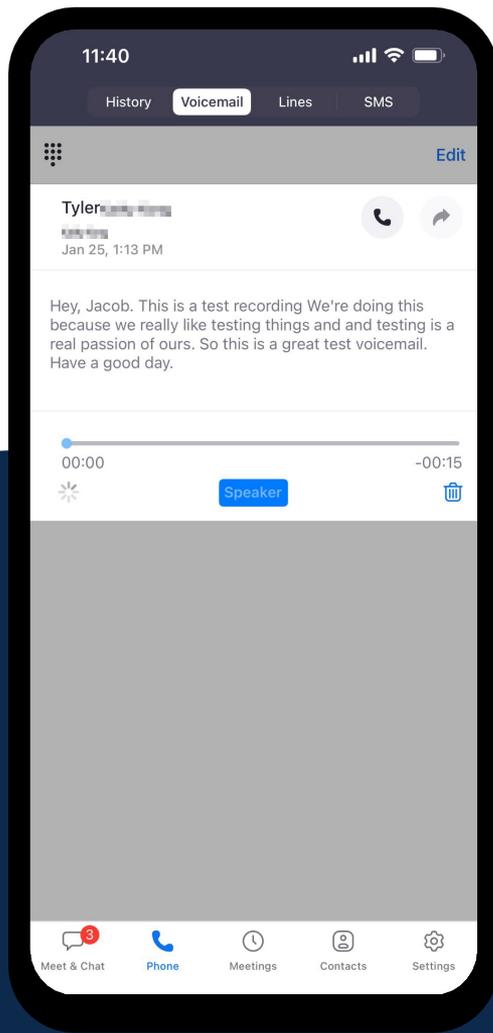
Contact is on a Zoom Phone call using the Zoom desktop client or mobile app.

# Zoom Mobile App

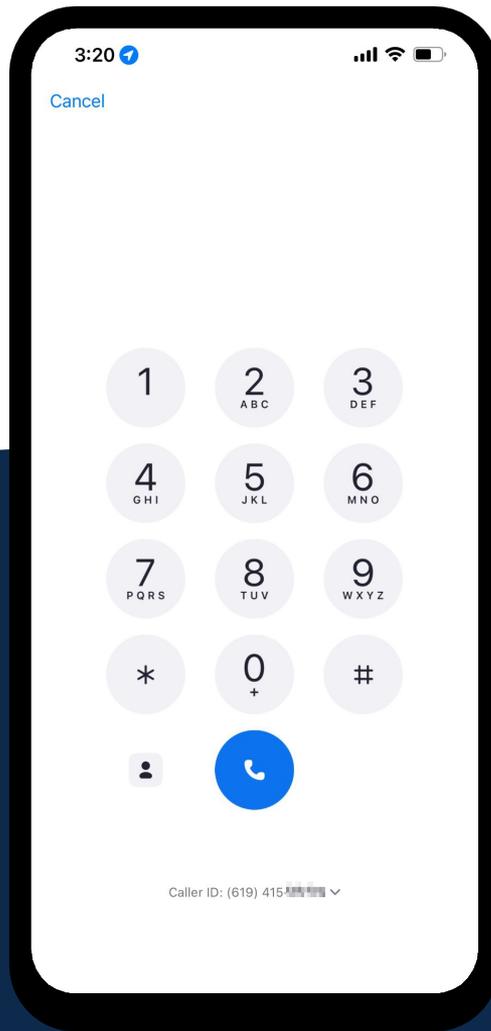
# History



# Voicemail



# Place a Call



# Choose Caller ID

