Zoom Phone User Training

June 2022
Agenda

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

Settings

- Manage Emergency Address.
- Set Outbound Caller ID.
- Create Business Hours.
Configure Zoom Phone

Settings

Edit Call Handling.
Configure Zoom Phone

Settings

Create Closed Hours.
To create a new voicemail greeting, select **Audio Library**.

- Click **Add Audio**.
- **Text to Speech**, **Record by Computer** or **Upload**.
Configure Zoom Phone

Delegation

- Click Add.
- Enter in the user name and click **Send Invite**.
- Choose **Delegation Privileges**.
When a new delegation comes in, click View.
Select 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
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
Desktop Client

Using Zoom Phone
Zoom Desktop App

Home Screen Settings
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.
Voicemail

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

My Contacts
- Starred 0
- External 1
- Bots 6
- Cloud Contacts 0

All Contacts
- Zoom Rooms 0
- Departments 8
- Employees 984
- Imported Contacts 2
- Unassigned 874

View contact info by clicking a contact in the left panel.
Contacts

My Contacts
- Starred: 0
- External: 1
- Bots: 6
- Cloud Contacts: 0

All Contacts
- Zoom Rooms: 0
- Departments: 8

Employees: 963
- Abbey Racallis-Massey (she/hers)
- Abdullah Almakrami
- Abigail Bierzychudek
- Abigail Loaf
- Abigail Oliver

View contact info by clicking a contact in the left panel.
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.
Transfer

Click **Transfer** from within your active call.
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.
Choose how you want to transfer the call.

- **Warm** Transfer
- **Blind** Transfer
- **Transfer to Voicemail**
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.
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.
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
Hey, Jacob. This is a test recording. We're doing this because we really like testing things and doing testing is a real passion of ours. So this is a great test voicemail. Have a good day.
Place a Call
Choose Caller ID

- Direct Number
  - (619) 415-0000
  - default
- Main Company Number
  - (669) 252-0000
- Hide Caller ID
  - May not work in certain countries or regions

Close