Zoom Phone End User Training

Carthage College

August 18, 2025
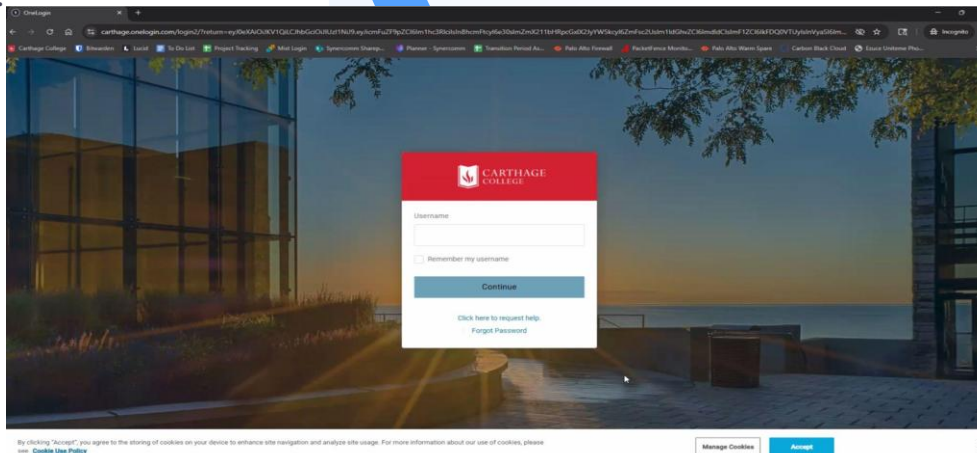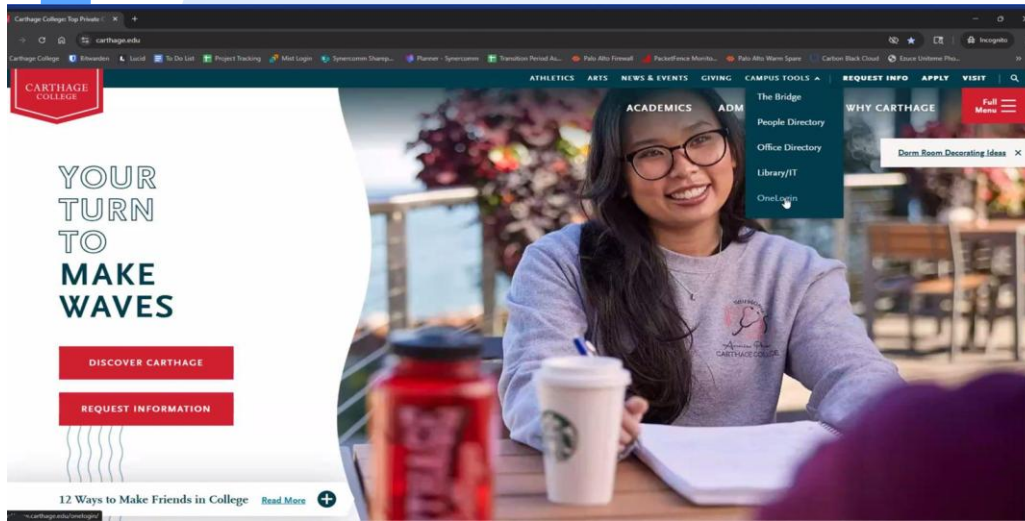
Sign In & Configuration
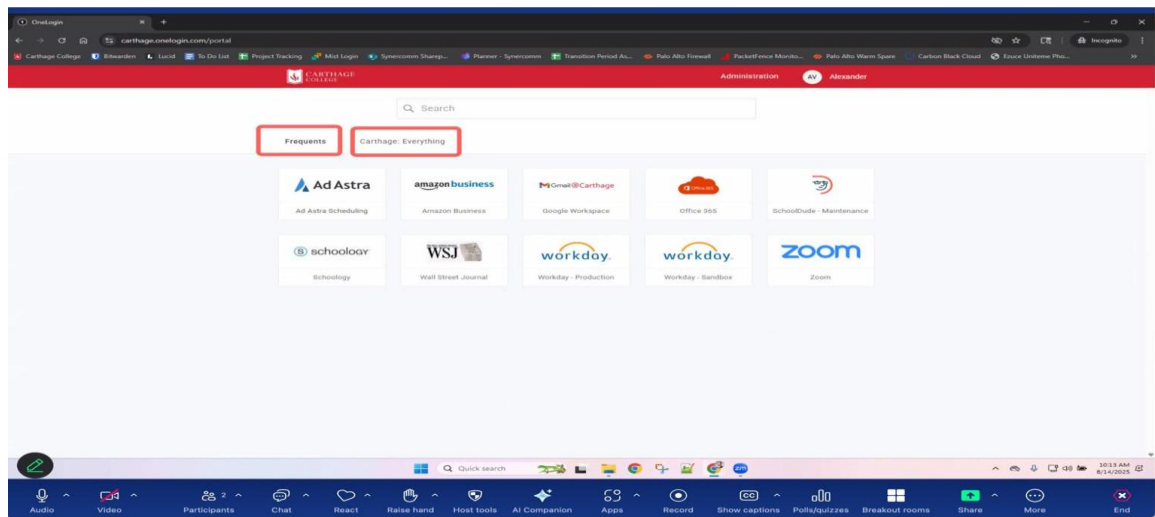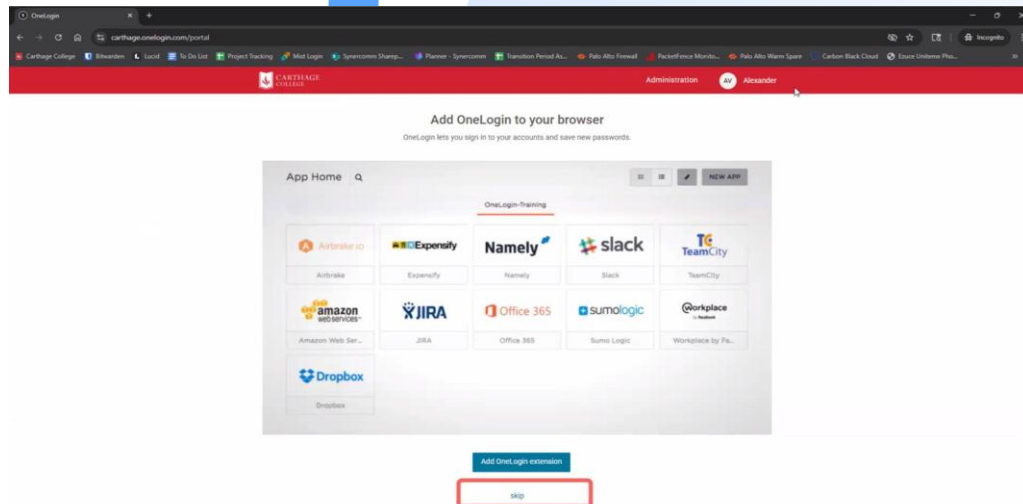
Web Portal Portal

zoom

Sign in to Zoom

✅ **Please go to carthage.edu**

✅ **Click Campus Tools, then OneLogin.**

✅ Please enter your login credentials.

Sign in to Zoom

6

Configure Zoom Phone

✓ Go to **Phone**.

✓ Setup the **Country** & **Area Code**.

✓ Set the **Time Zone**.

● To edit time zone at a later time go to **Profile** and select **Edit** under **Date and Time**.

✓ Set a **PIN**.

✓ Click **Setup**.

Configure Zoom Phone

Settings

✅ Manage **Emergency Address**.

✅ Set **Outbound Caller ID**.

✅ Create **Business Hours**.

Configure Zoom Phone

Settings

Edit **Voicemail Greeting**

Configure Zoom Phone

Voicemail Greeting

✅ **Text to Speech**, **Record by Computer** or **Upload**.

Add Audio

Text to Speech | Upload | **Record by Computer**

Asset Name

Enter an asset name

Category

Select category

Language

American English

Record Audio
Click the record button to start recording

🔴   00:00 / 04:00

Visibility

🔘 Personal Audios   ⚪ Asset Library (Public)

Add Audio

Text to Speech | Upload | Record by Computer

Asset Name

Business Hours or Closed Hours VM Greeting

Category

Voicemail Greeting ✕

Language   **Voice**

American English   Matthew-Male

Message to play ?

Enter Message

0/3000

Visibility

🔘 Personal Audios   ⚪ Asset Library (Public)

Add   **Cancel**

Add Audio

Text to Speech | **Upload** | Record by Computer

Asset Name

Enter an asset name

Category

Select category

Language

American English

Audio Upload

Upload a MP3 or WAV audio file. The file must be less than **10 MB**

⬆ **Upload**

Visibility

🔘 Personal Audios   ⚪ Asset Library (Public)

zoom

Configure Zoom Phone

Holiday Hours

✅ Next to Holiday List & Call Handling click **Manage**.

✅ Click **Add**.

✅ Enter a holiday name, select the date ranges you would like the holiday to be in effect.

✅ Click **Save**.

Configure Zoom Phone

Delegation

✅ Click **Add**.

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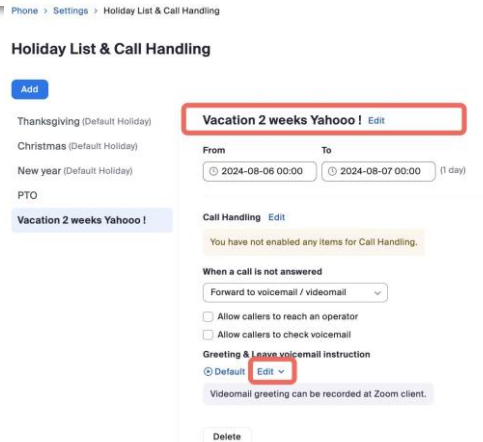
✅ Choose **Delegation Privileges**.

Configure Zoom Phone

Delegation

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

Configure Zoom Phone

Other Settings

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

Personal Contacts

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, Office 365, and Exchange.

- ✅ Download your Zoom Workplace app.

Using Zoom Phone

Desktop Client

Signing into the Zoom app

Zoom Desktop App

Home Screen Settings
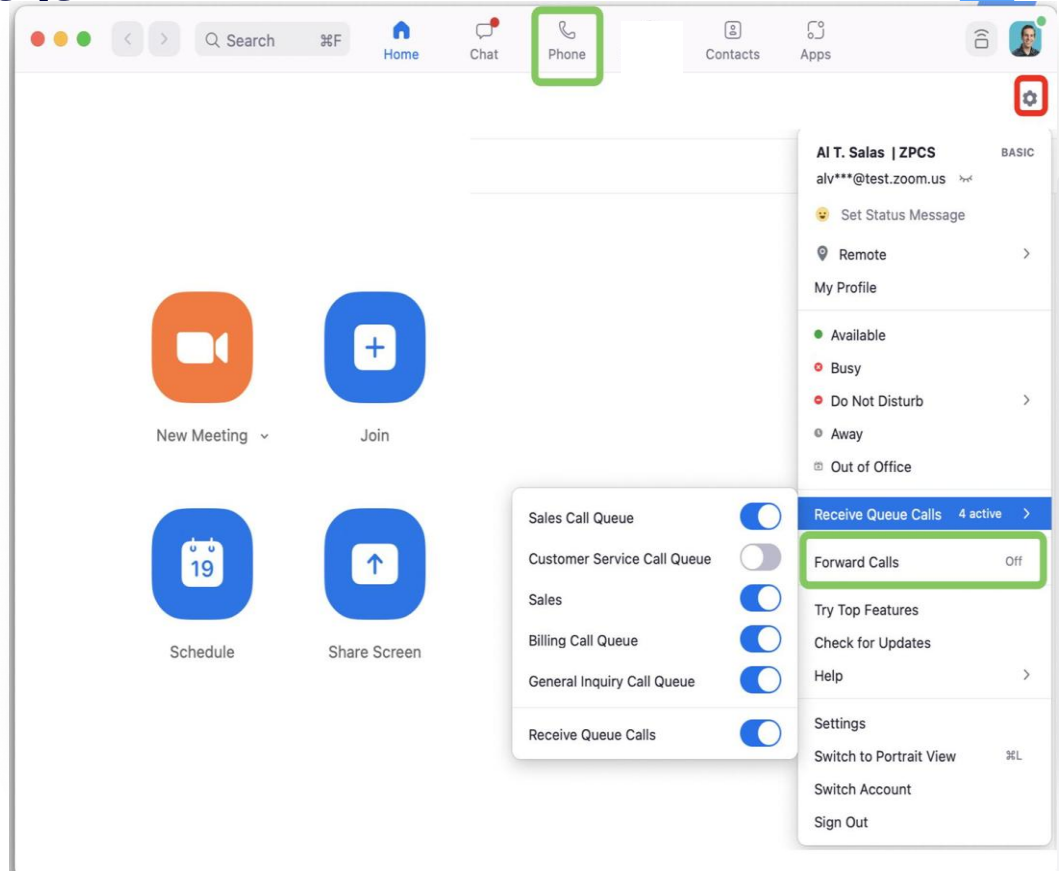
Zoom Desktop App
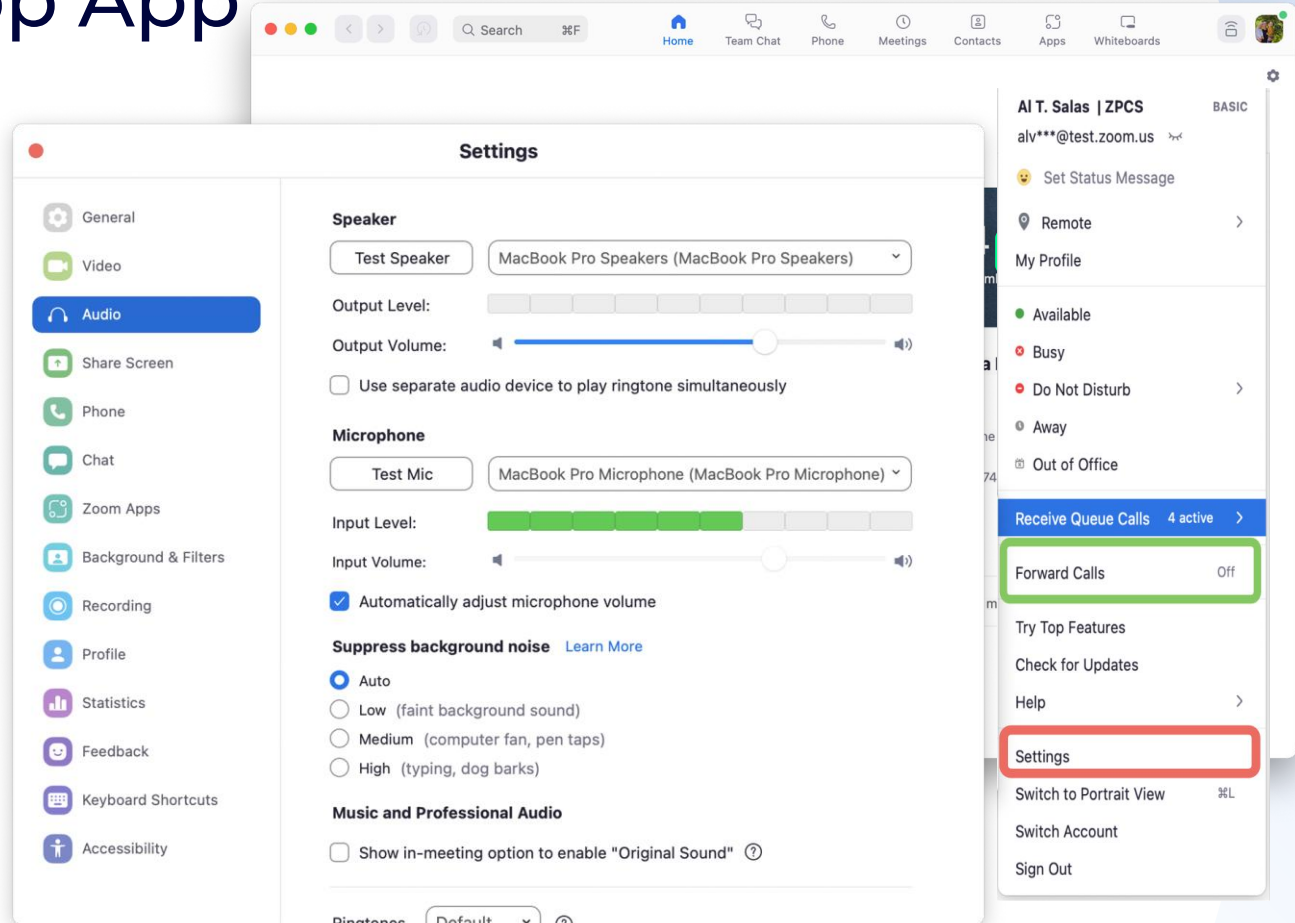
Audio Preferences

Zoom Desktop App

Audio Preferences
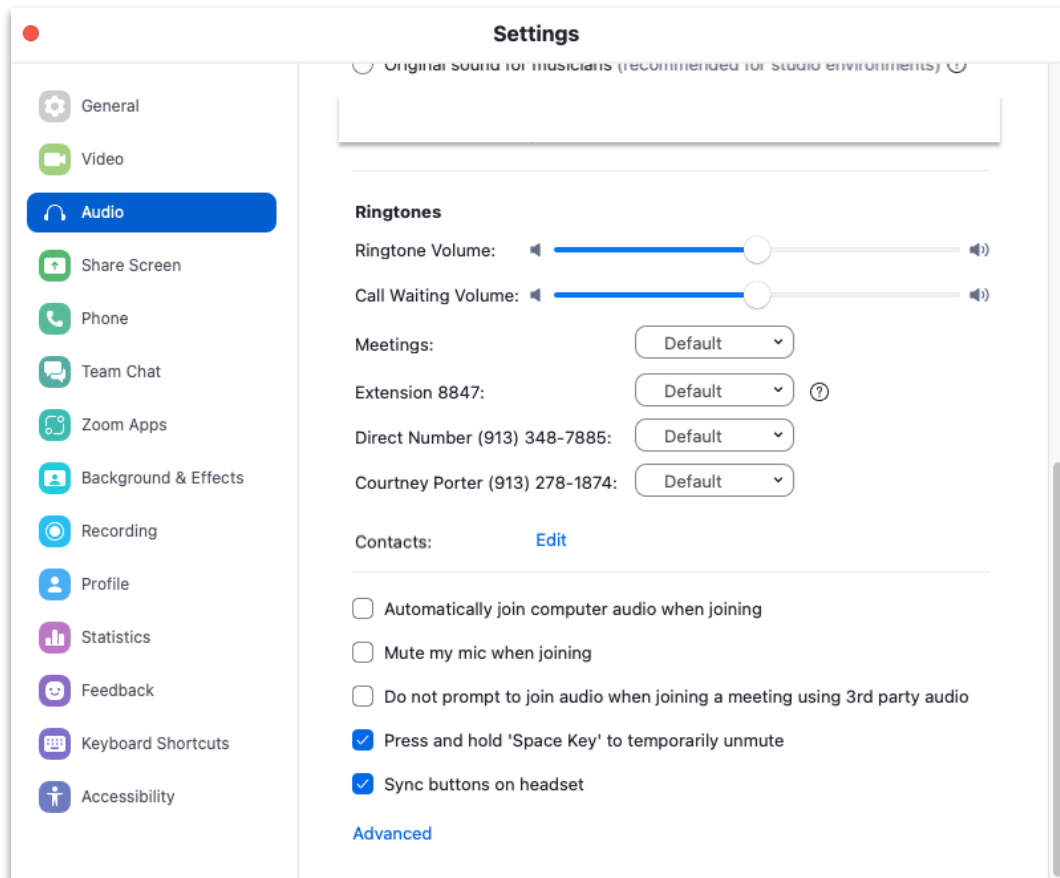
Receiving Zoom Phone Call while on Zoom Video Meeting

Zoom Desktop App

Zoom Phone Settings
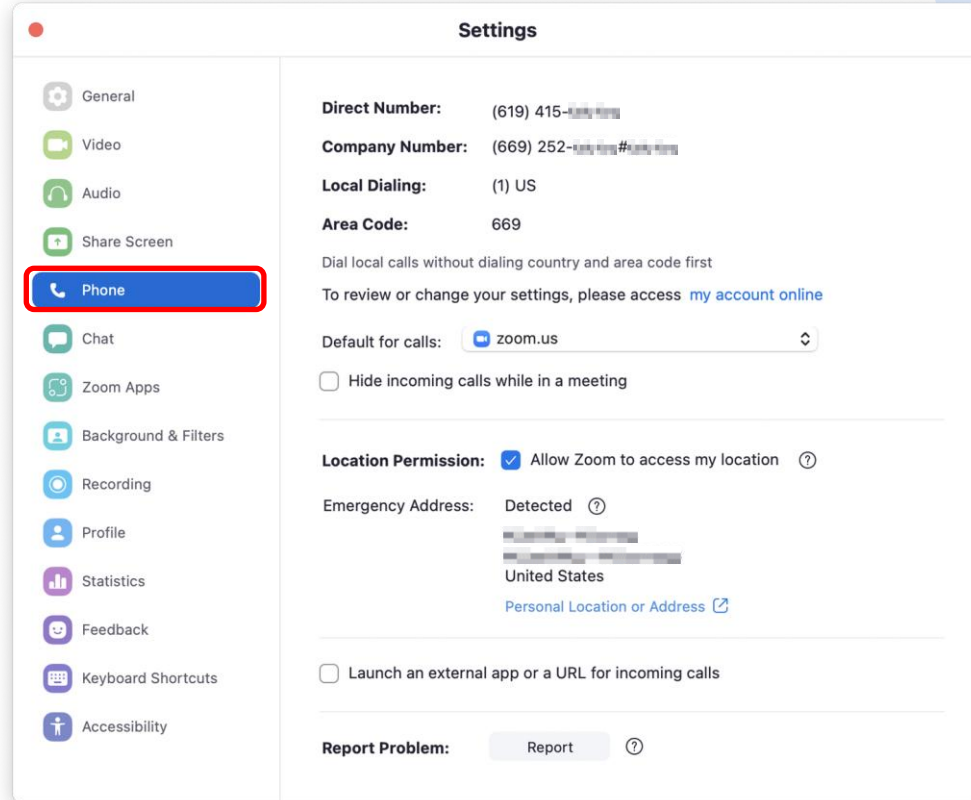
Zoom Desktop App

History

✓ Send **Text** Message

✓ Create **Contact**

✓ **Copy** Number

✓ **Block** Number

✓ **Clear** Call History
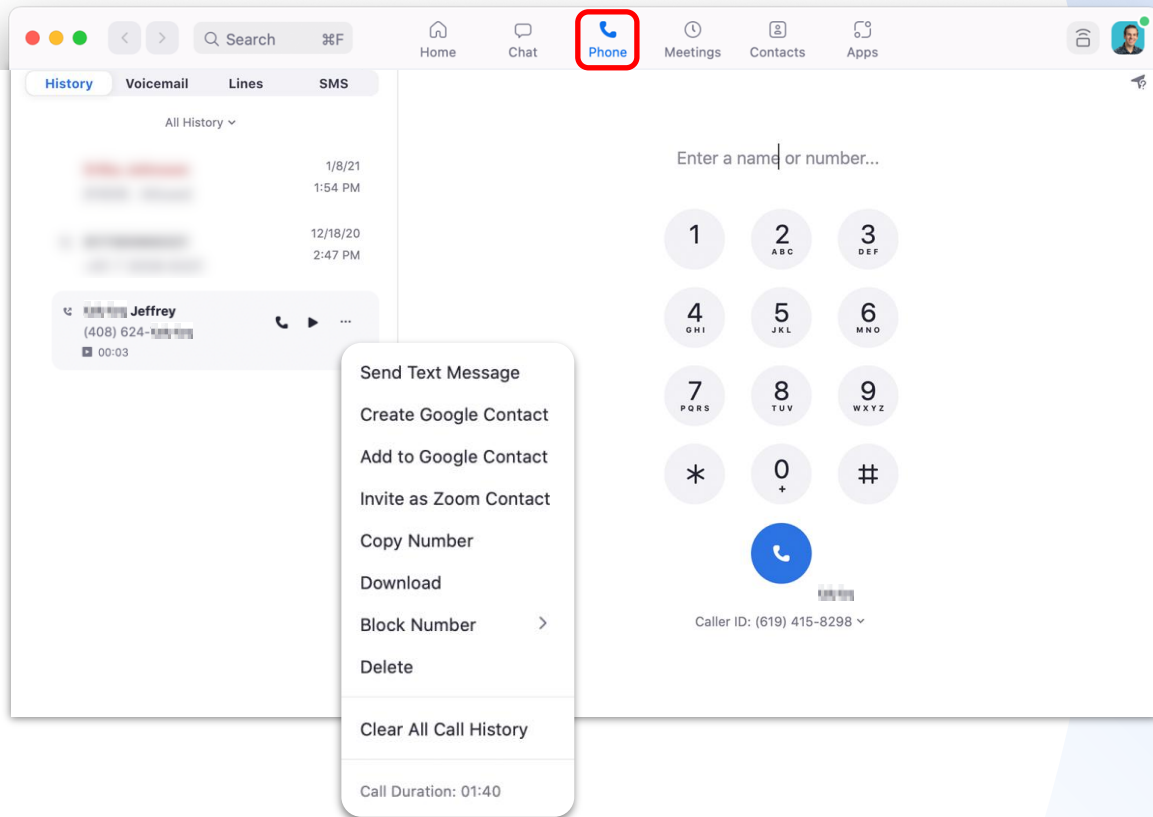
Zoom Desktop App

Voicemail

- ✅ Click the **Phone** icon to call back.

- ✅ Click the **Play** icon to listen to the voicemail.

- ✅ Select **...** for more options.
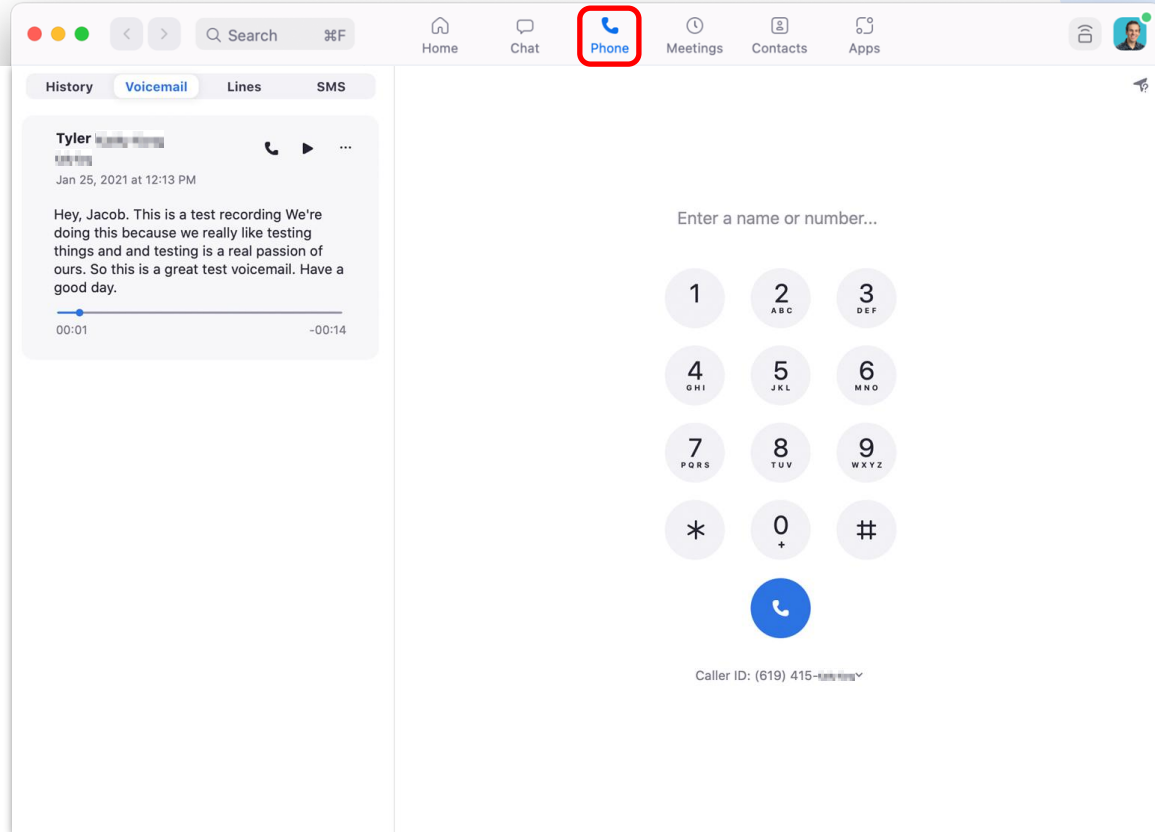
zoom

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.
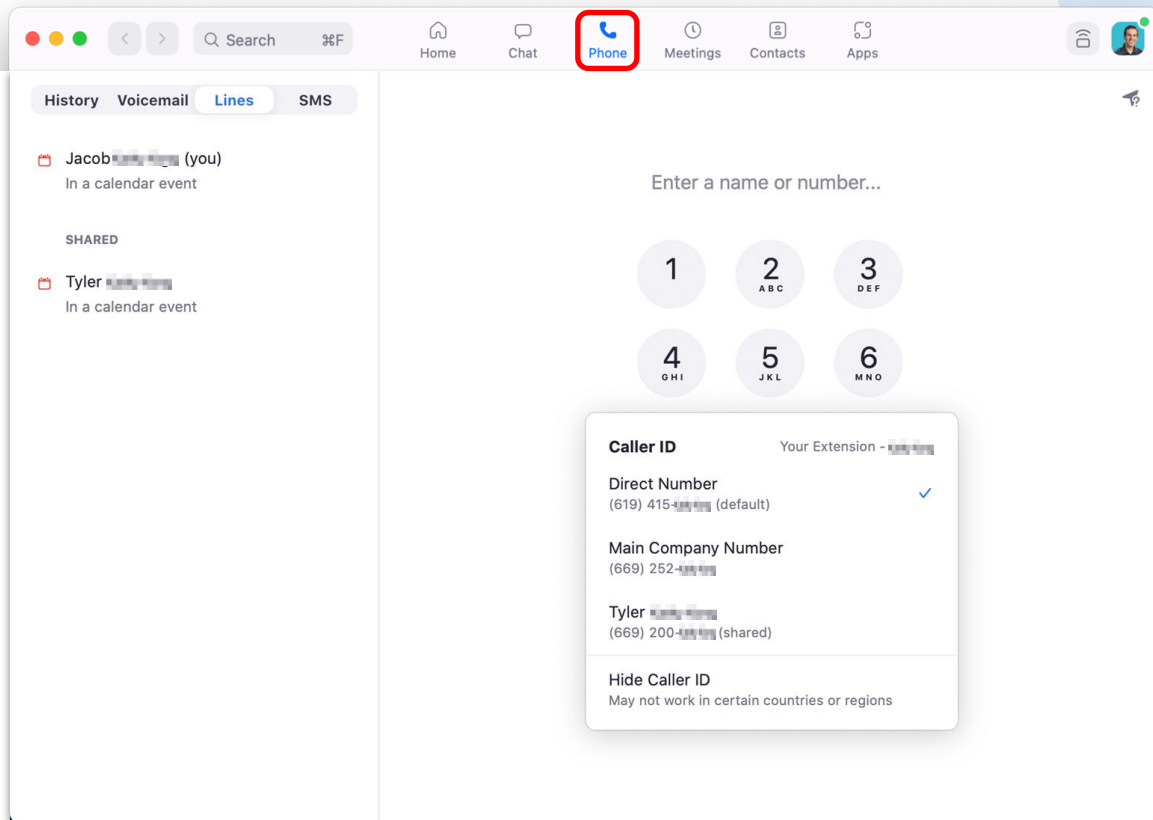
Zoom Desktop App

SMS
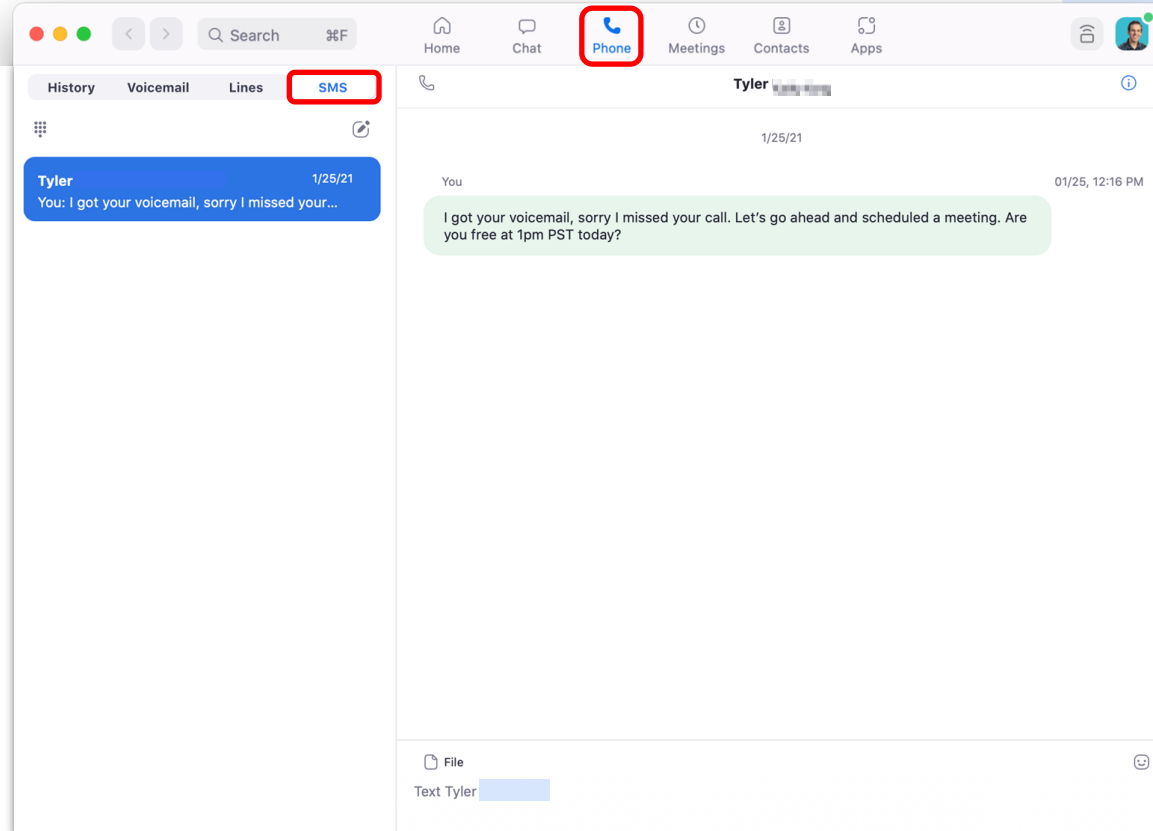
Zoom Desktop App

Placing a Call

✅ Start typing a name or number to bring up your contacts list.

✅ You can also dial directly from the keypad.
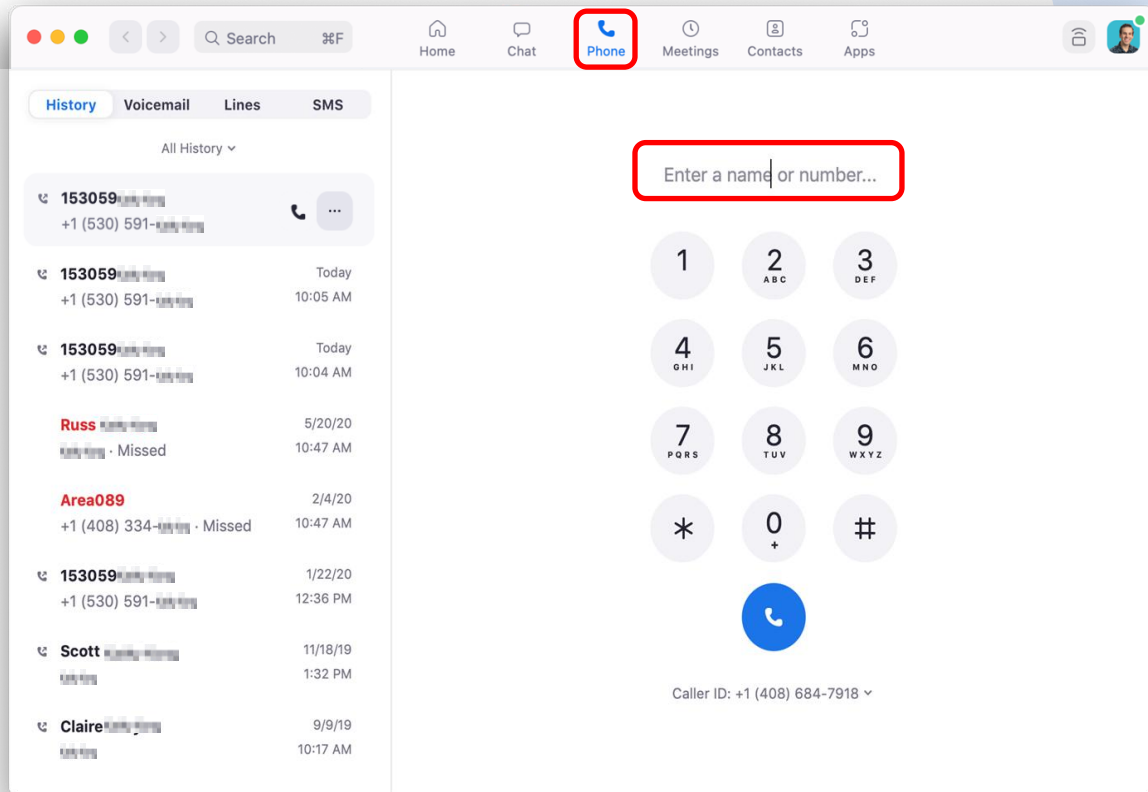
Zoom Desktop App

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.
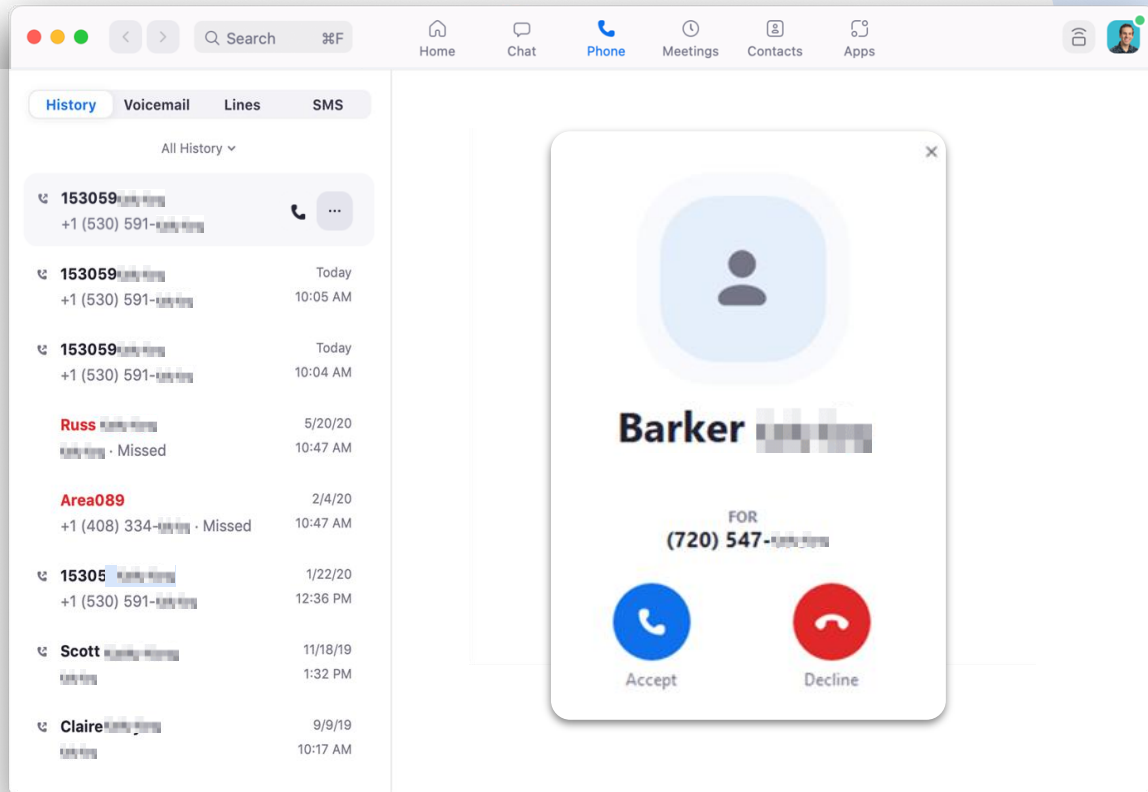
Zoom Desktop App

Active Call

- **Add Call**: add up to 10 people to the call. (*10+ 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.
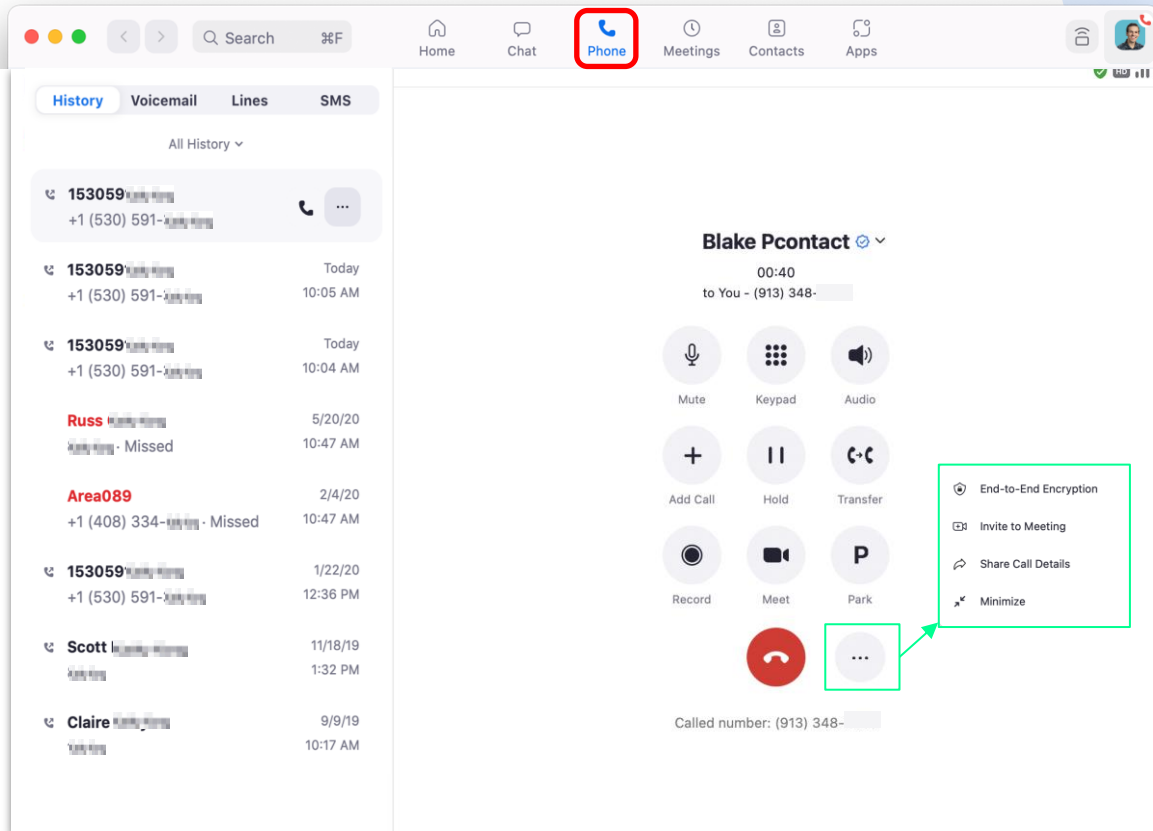
Zoom Desktop App

Active Call: Transferring a Call

- Click on the Transfer button

- Enter the name, number, or ext

- Select the transfer method

- Complete the Transfer

zoom

Zoom Desktop Client

Active Call: 3 Way Conference

Blake Pcontact ✓ ⌄

02:00
to You – (913) 348-█████

🎤 Mute   ⚏ Keypad   🔊 Audio

➕ Add   ⏸   ↻↻

Add call

Add as a separate call
This will put the current call on hold.

Add to the current call
This will not put the current call on hold.

● Click Add Call

Add call

Enter a name or number...

1	2 ABC	3 DEF
4 GHI	5 JKL	6 MNO
7 PQRS	8 TUV	9 WXYZ
✳	0 +	#
⋯	📞	

Caller ID: (855) 252-███ ⌄
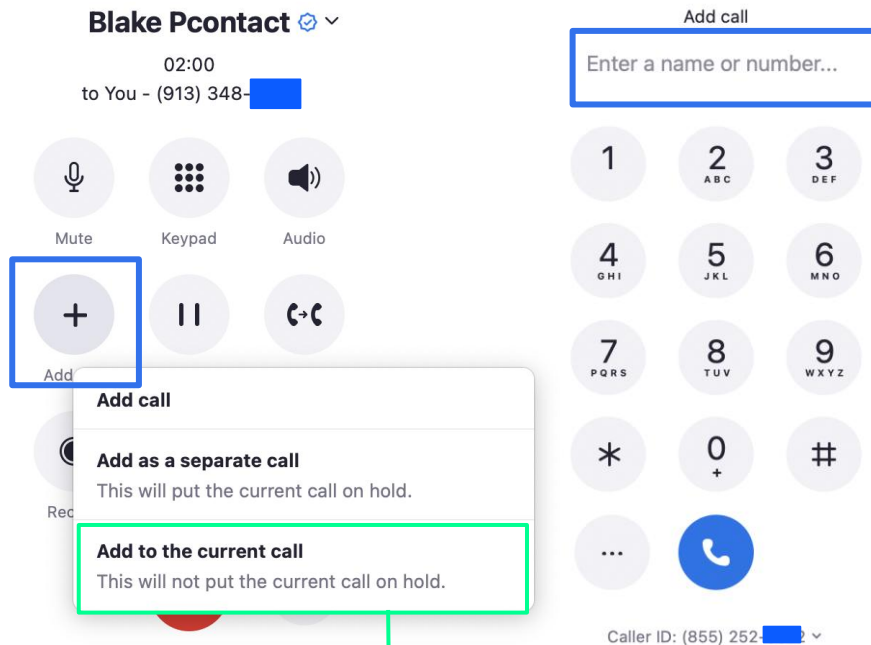
● Enter in the name, number, or ext

Blake Pcontact ✓
On hold – click to swap   ⋯

Seth H.   ⌄   ⋯
00:15

🎤 Mute   ⚏ Keypad   🔊 Audio

➕ Add call   ⏸ Hold   ↻↻ Transfer

⏺ Record   ✦ Summarize   🎥 Meet

📞   ⋯
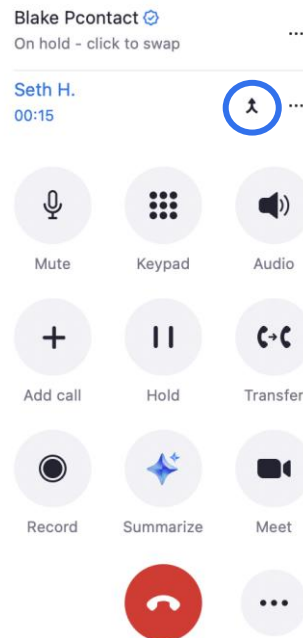
● You can swap between the two calls if needed, otherwise you can click Merge to merge the calls together

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Conference call ⌄
02:21

🎤 Mute   ⚏ Keypad   🔊 Audio

➕ Add call   ⏸ Hold   ↻↻ Transfer

⏺ Record   ✦ Summarize   🎥 Meet

📞   ⋯
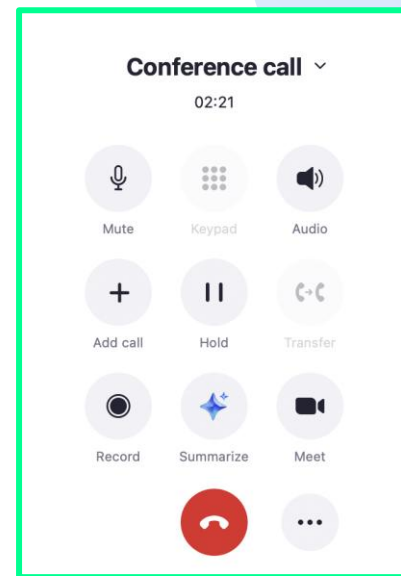
Zoom Desktop Client

Call Flip

- Call flip allows you to place your current Zoom Phone call on hold and answer it on another device.
  (*Zoom desktop client, mobile app, or provisioned desk phone*).

- Place the call on **Hold**.

- On another device you are logged into, click **Phone**, then select **Line**.

- **Unhold**: Click the icon to pick up the call on the device, in this case the call will be answered on the mobile phone via the Zoom mobile app.
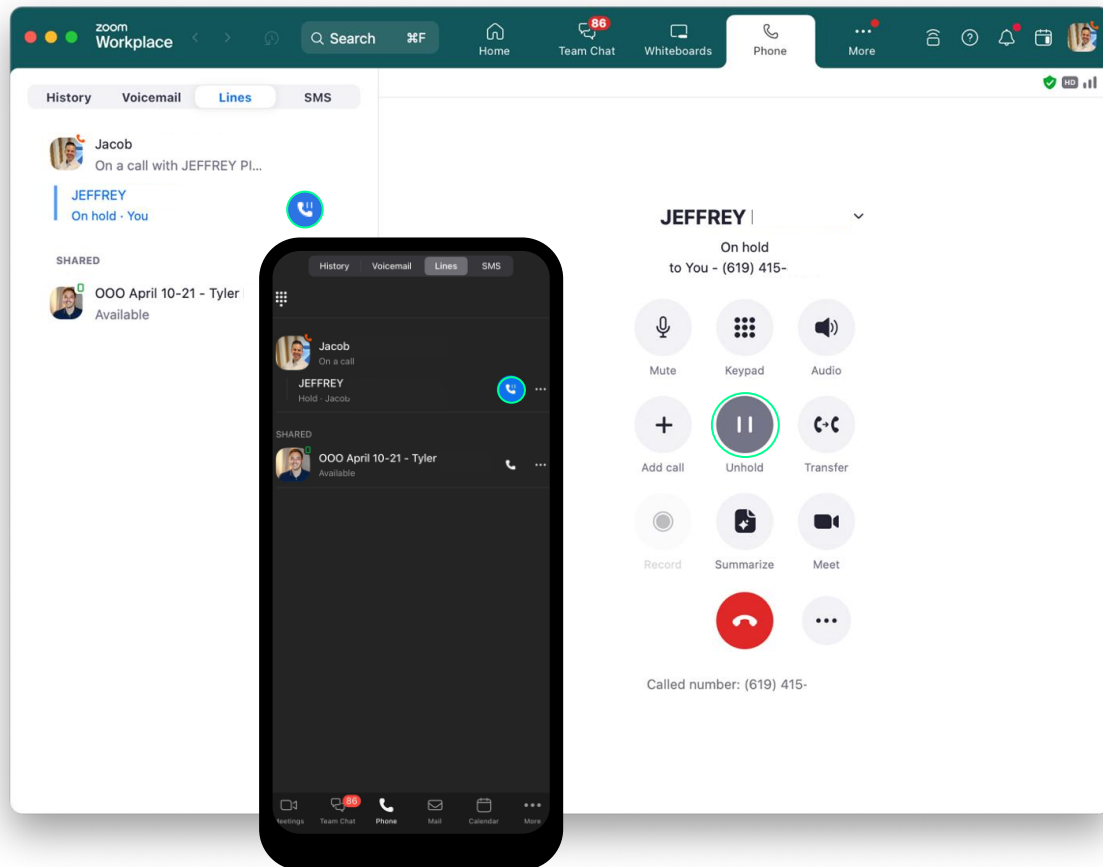
Zoom Desktop App

Contacts
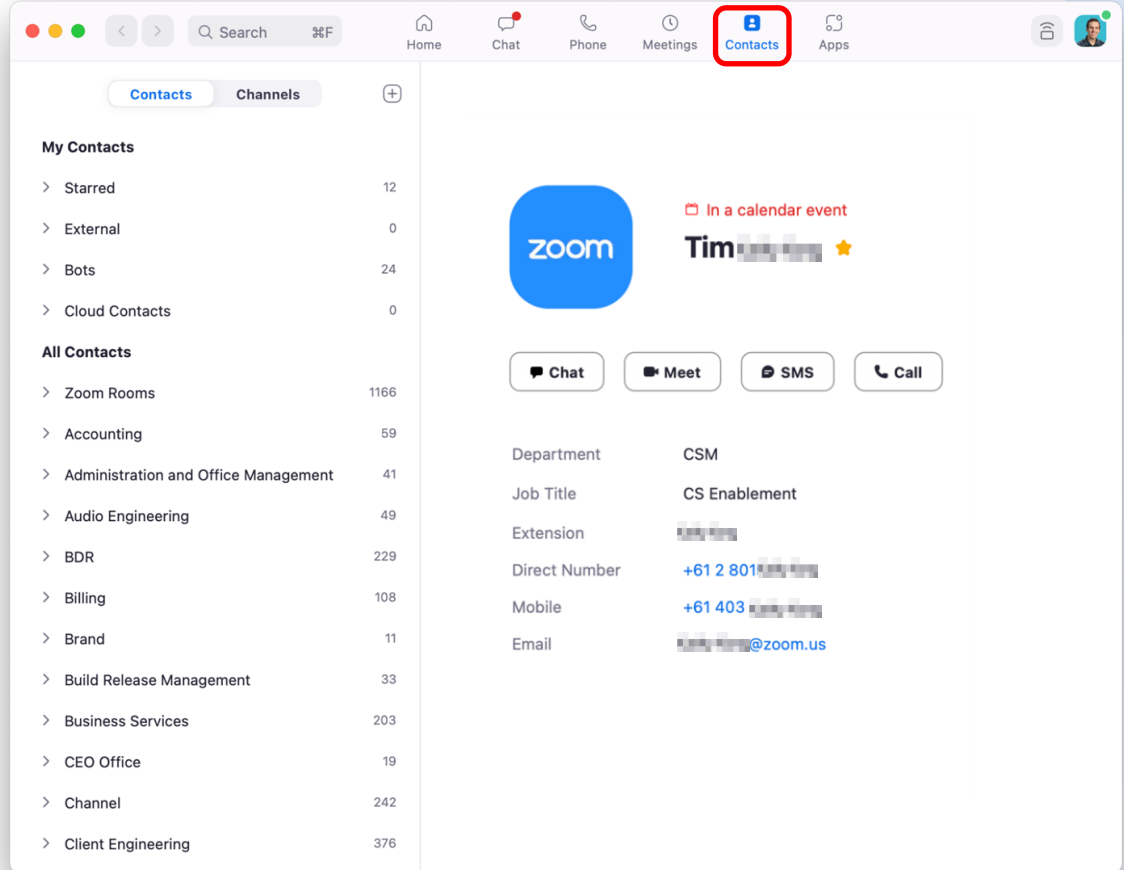
Status

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

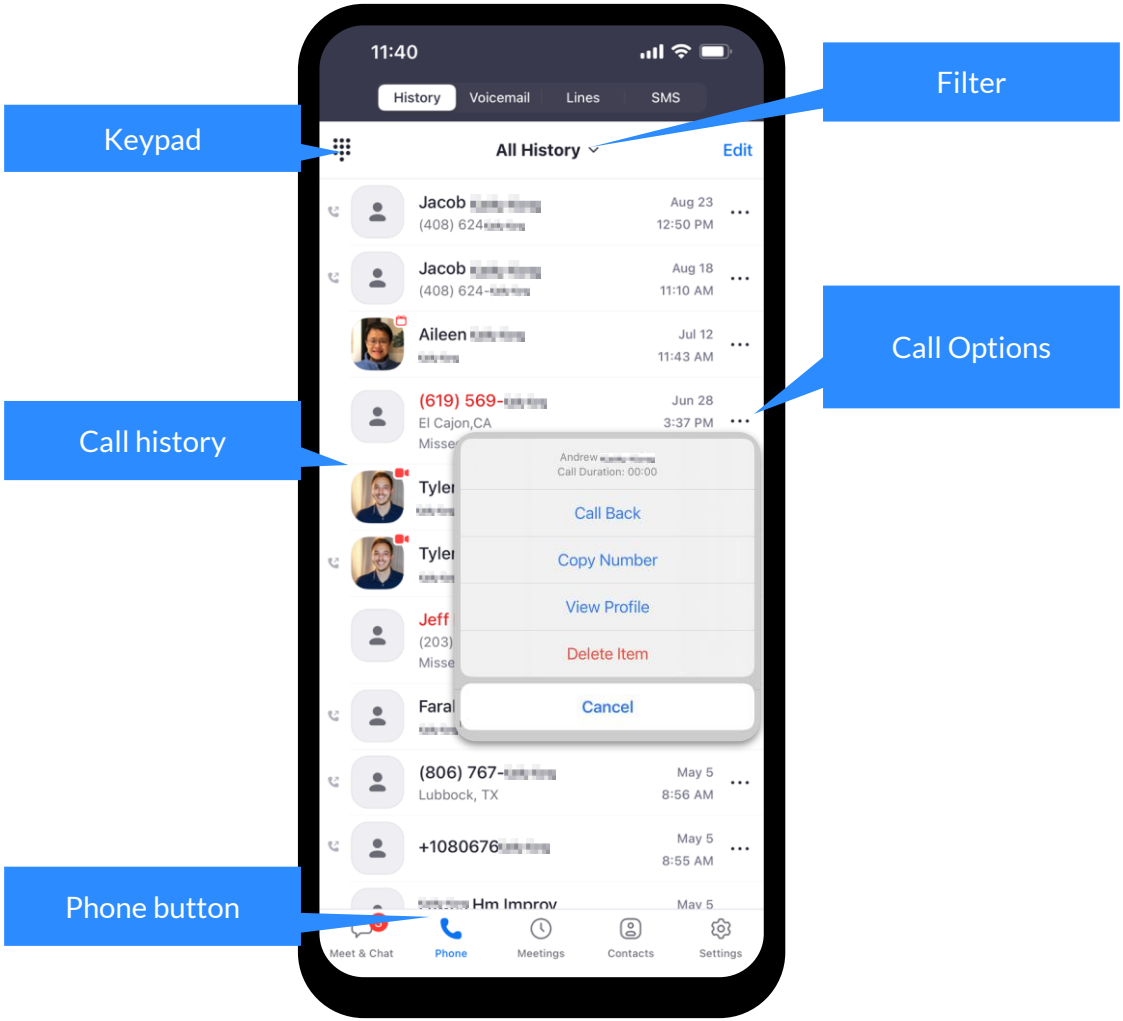Contact is sharing their screen while in a Zoom meeting.
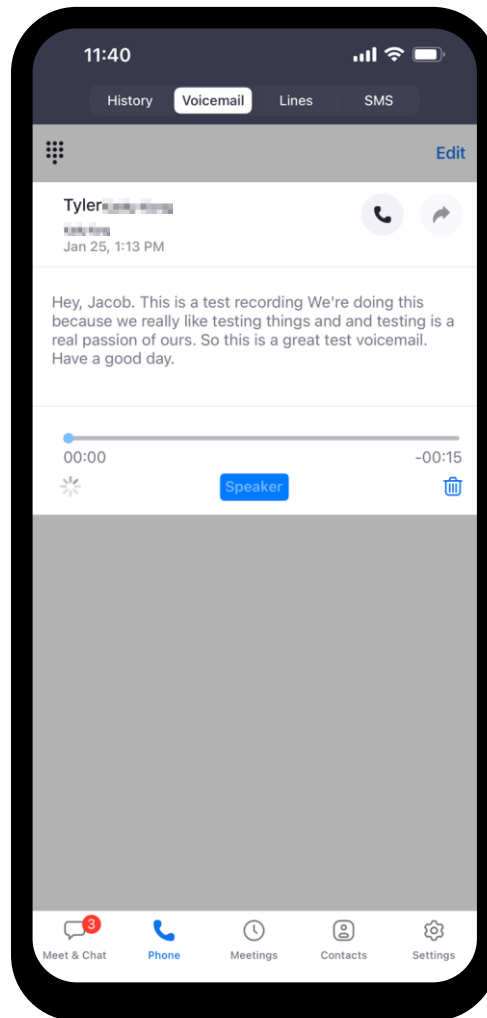
On a Call

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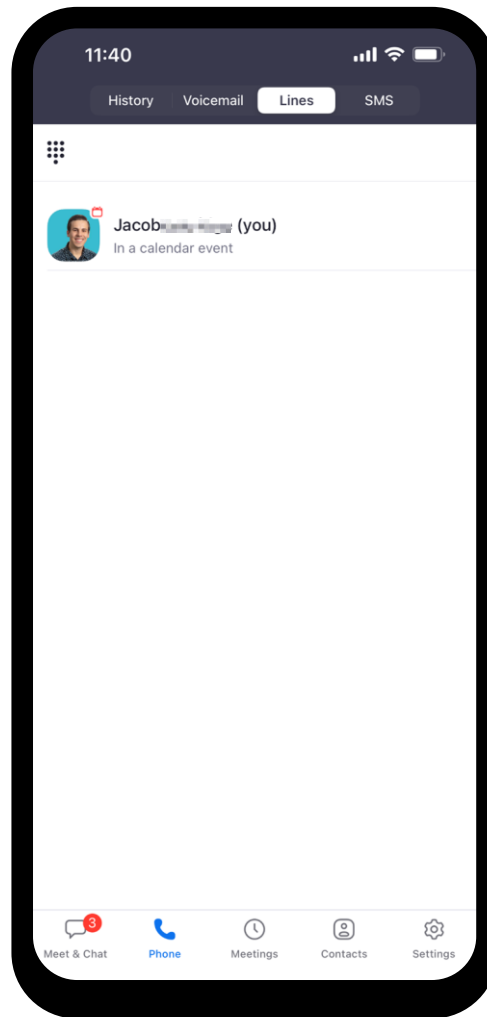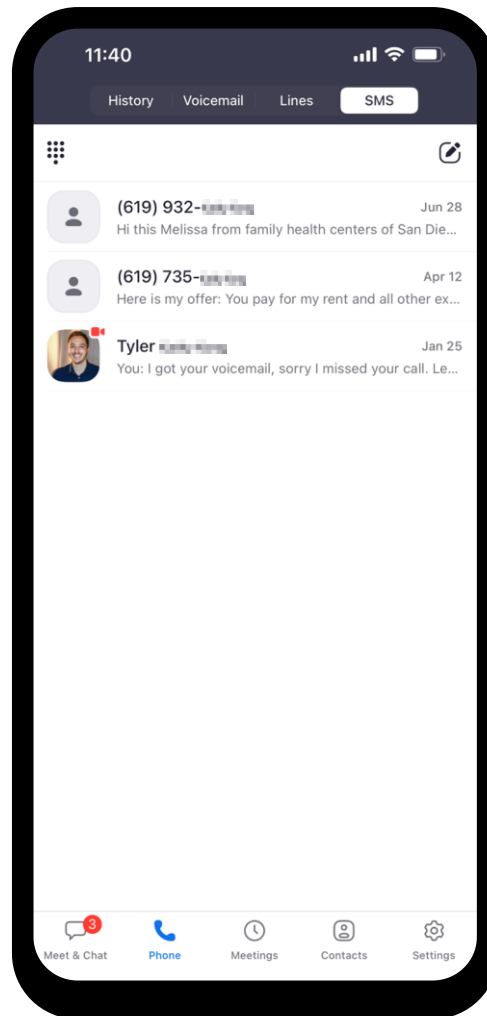
Zoom Mobile App

History

Keypad

Filter

Call Options

Call history
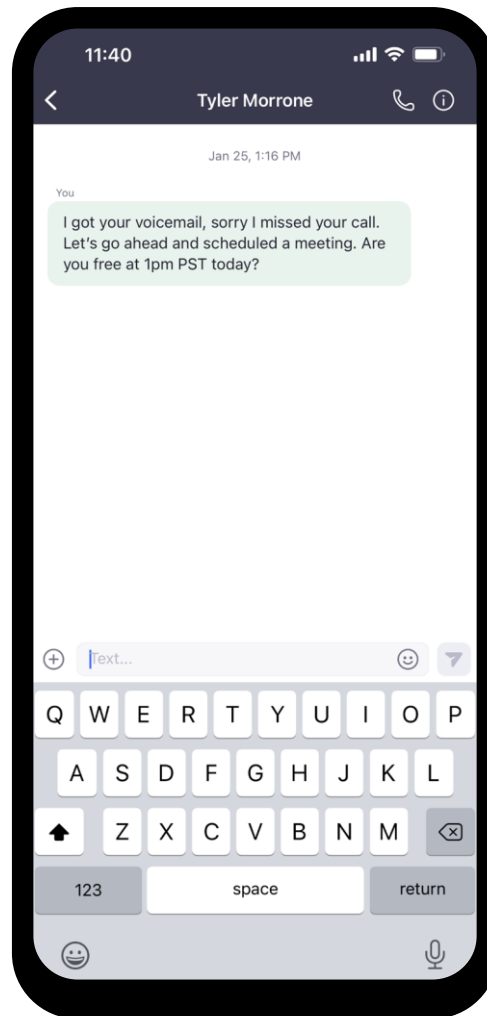
Phone button

Voicemail

Lines

SMS

SMS

ZOOM

Place a Call
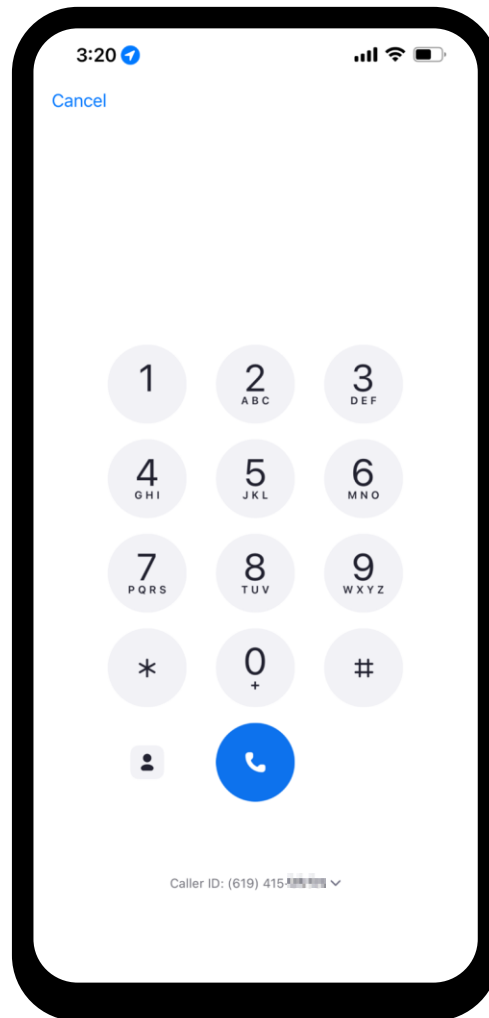
Choose Caller ID
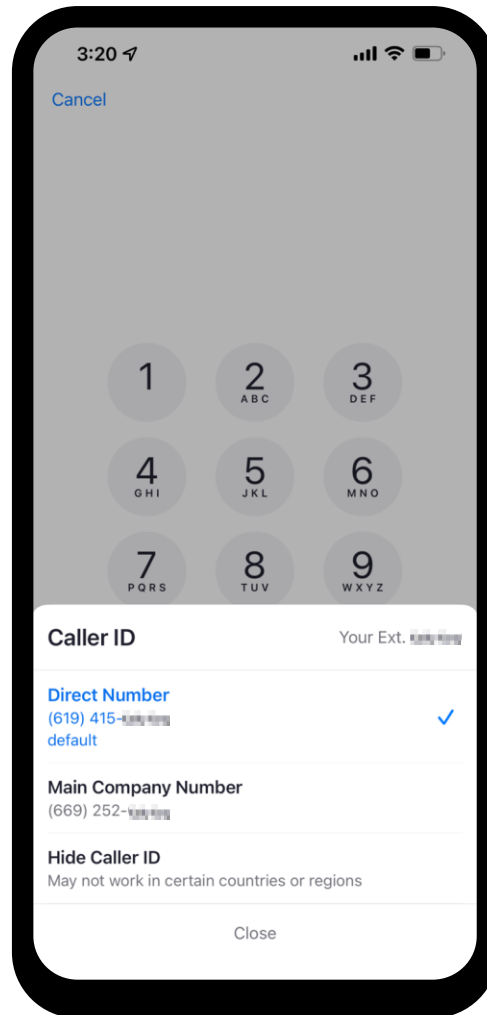
Resources & Support
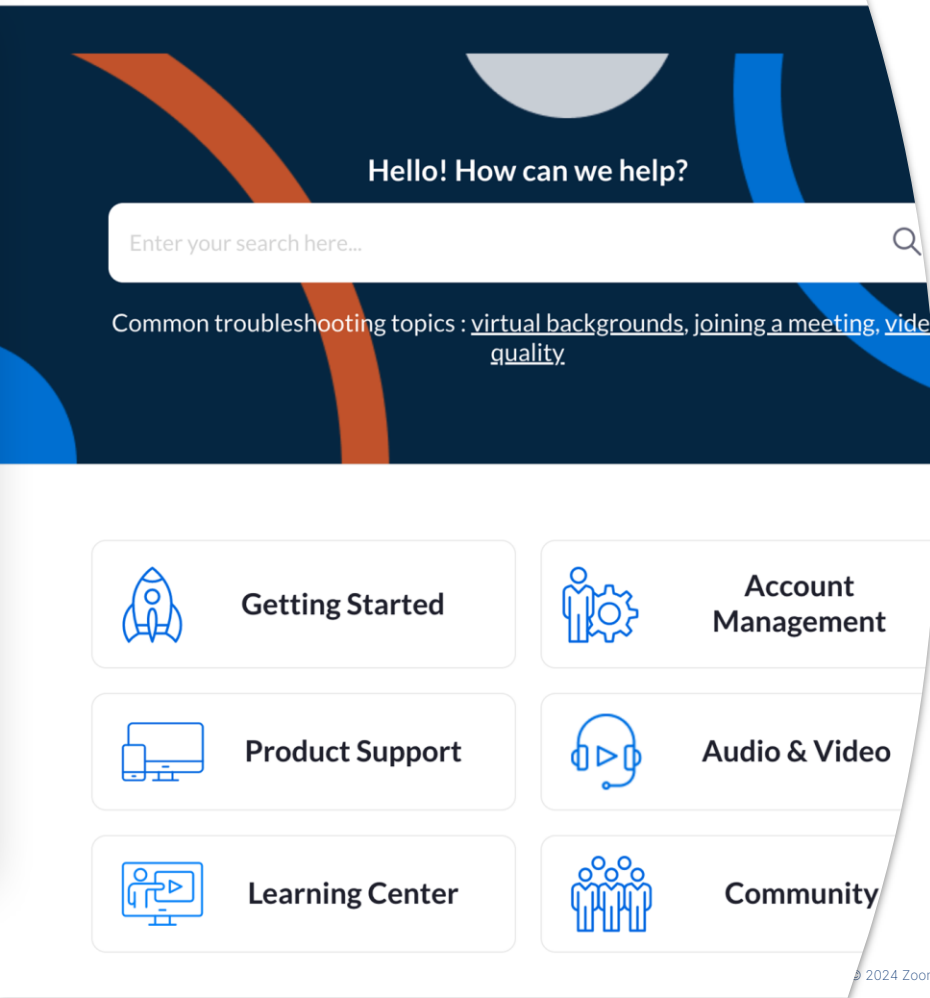
zoom

Resources & Support

✅ Please go to support.zoom.us.

✅ Search through Zoom's knowledge base for related content.

✅ Browse through Quickstart Guides, Video Tutorials, or specific Support Topics.