



# Zoom Phone End User Training



**Carthage College**

August 18, 2025

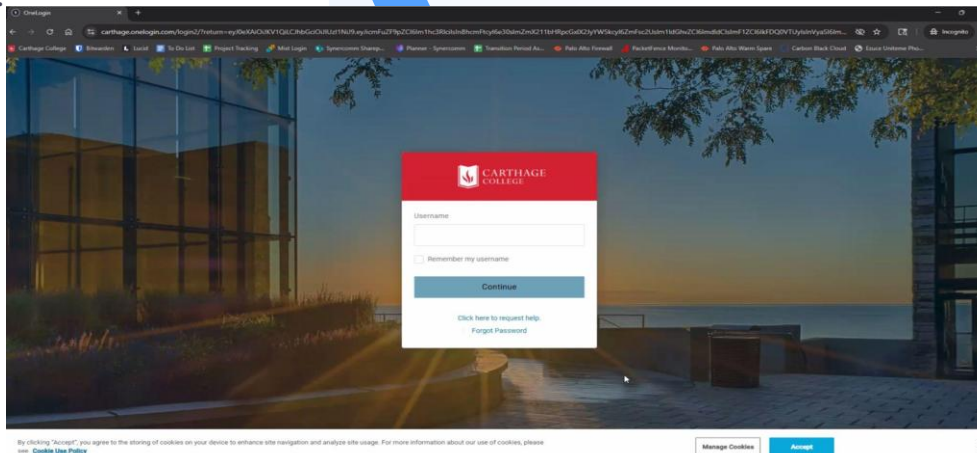
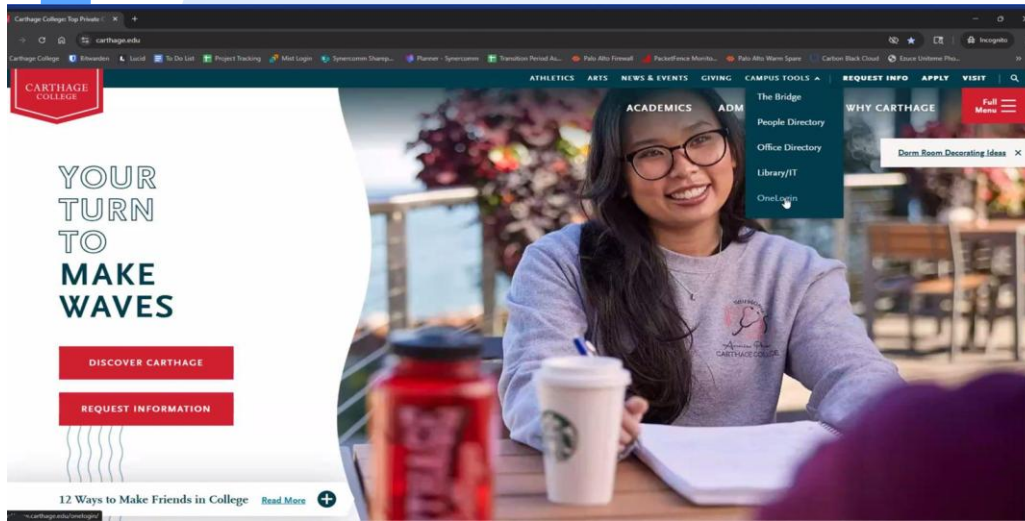


# Sign In & Configuration

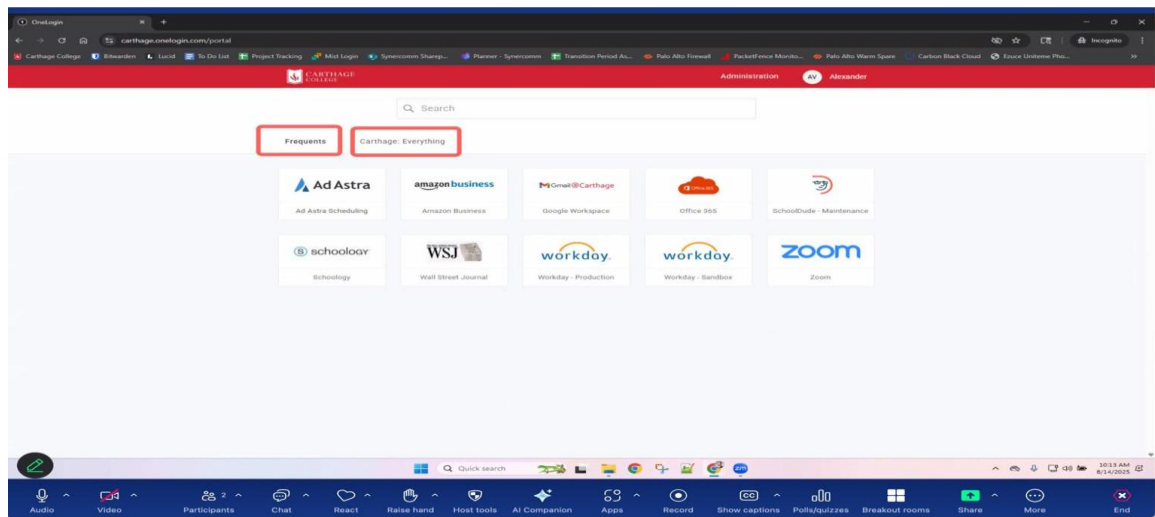
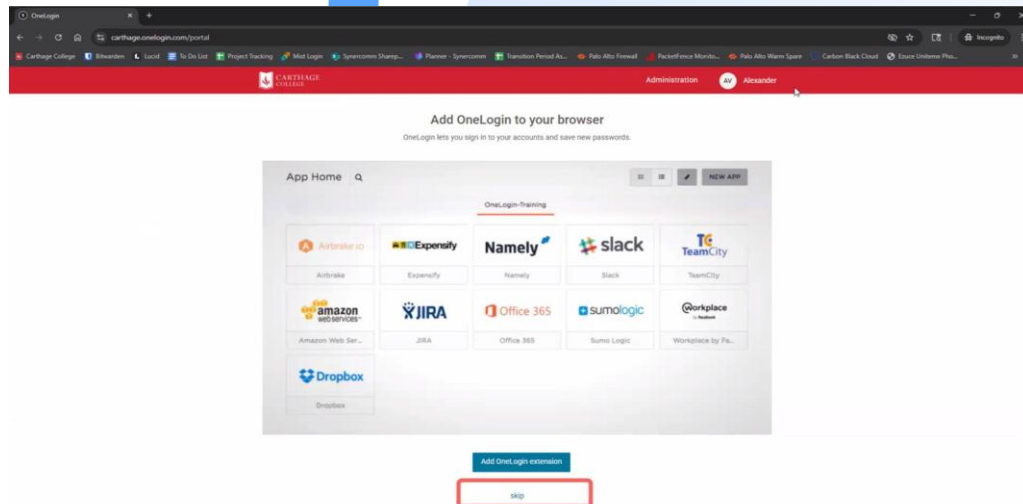
## Web Portal Portal

# Sign in to Zoom

- ✓ Please go to [carthage.edu](https://carthage.edu)
- ✓ Click [Campus Tools](#), then [OneLogin](#).
- ✓ Please enter your login credentials.



# Sign in to Zoom



# Configure Zoom Phone

The screenshot shows the Zoom web interface for configuring a phone extension. The top navigation bar includes links for 'REQUEST A DEMO', '1.888.799.5926', 'RESOURCES', and 'SUPPORT'. Below this, the main navigation bar has 'zoom' logo, 'SOLUTIONS', 'PLANS & PRICING', 'CONTACT SALES', 'SCHEDULE A MEETING', 'JOIN A MEETING', 'HOST A MEETING', and a user profile icon. The left sidebar is divided into 'PERSONAL' and 'ADMIN' sections. Under 'PERSONAL', 'Phone' is highlighted. The main content area is titled 'Quick setting your extension of Zoom Phone'. It contains three sections: 'Company Number (205) 809-XXXX' and 'Extension Number XXXX' (both masked); 'Select country and area code' with a dropdown set to 'United States of America' and a text box containing '408'; and 'Set your time zone. You can change it later in Profile' with a dropdown set to '(GMT-7:00) Pacific Time (US and Canada)'. Below these is a 'Set PIN code to listen to voicemail by telephone' section with a text box containing '6260' and a 'Setup' button.

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

PERSONAL

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

ADMIN

- Dashboard
- > User Management
- > Room Management
- > Phone System Management
- > Account Management
- > Advanced

### Quick setting your extension of Zoom Phone

Company Number (205) 809-XXXX Extension Number XXXX

Select country and area code

United States of America 408

Set your time zone. You can change it later in Profile

(GMT-7:00) Pacific Time (US and Canada)

Set PIN code to listen to voicemail by telephone

6260

Setup

- ✓ 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](#).

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

PERSONAL

- Profile
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- Settings

ADMIN

- Dashboard
- > User Management
- > Room Management
- > Phone System Management
- > Account Management
- > Advanced

History Voicemail Recording Settings

Site Main Site (Main Site)

Package US/CA Unlimited Calling Plan ⓘ

Number(s) (619) 415-1234 (United States)

Company Number (669) 252-1234 #1234

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

Personal Emergency Address [Manage](#)

Outbound Caller ID Jacob 1234567890 - (619) 415-1234 (United States) ▾

Country United States (+1) ▾

Area Code ⓘ 669 [Edit](#)

Call Handling

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

zoom Products Solutions Resources Plans & Pricing Schedule Join Host v Whiteboard

PERSONAL

- Profile
- Meetings
- Webinars
- Phone
- Personal Contacts
- Contact Center
- Zoom IQ for Sales
- Whiteboards
- Recordings
- Clips BETA
- Settings
- Scheduler
- Analytics & Reports

ADMIN

- Dashboard
- User Management
- Team Chat Management
- Device Management
- Room Management
- Workspaces Management
- Phone System Management
- Contact Center Management
- Account Management

Country/Region: United States (+1)

Area Code: 226 Edit

Call Handling

Business Hours

Mon	Tue	Wed
8:00 AM ~ 5:00 PM	8:00 AM ~ 5:00 PM	8:00 AM ~ 5:00 PM
Thu	Fri	
8:00 AM ~ 5:00 PM	8:00 AM ~ 5:00 PM	Edit

Call Handling Edit

- Zoom Desktop Apps
- Zoom Mobile Apps
- Desk Phone : Yealink t53w

Call Handling Ring Mode

Simultaneous

Max Wait Time

30 seconds

When I'm busy on another call

Call waiting

When a call is not answered

Forward to voicemail / videomail

☐ Allow callers to reach an operator

☐ Allow callers to check voicemail

Greeting & Leave voicemail instruction

Default Edit

Videomail greeting can be recorded at Zoom client.

Closed Hours

Call Handling Edit

# Configure Zoom Phone

## Settings



Edit [Call Handling](#).

### Call Handling for Business Hours

- ☒ Zoom Desktop Apps
- ☒ Zoom Mobile Apps
- ☒ Desk Phone - Yealink t53w

Add Phone Number

Close

Closed Hours

### Call Handling [Edit](#)

- Zoom Desktop Apps
- Zoom Mobile Apps
- Zoom Phone Appliance Apps

**Call Handling Ring Mode:** Simultaneous

#### Max Wait Time

30 seconds

#### When I'm busy on another call

Call waiting

#### When a call is not answered

Forward to voicemail / videomail

- ☐ Allow callers to reach an operator
- ☐ Allow callers to check voicemail

#### Greeting & Leave voicemail instruction

• [Default](#) [Edit](#)

Choose from Asset Library to be recorded at Zoom client.

Add Audio

# Configure Zoom Phone

## Settings



Edit [Voicemail Greeting](#)



# Configure Zoom Phone

## Voicemail Greeting

### Add Audio

[Text to Speech](#) [Upload](#) [Record by Computer](#)

#### Asset Name

Business Hours or Closed Hours VM Greeting

#### Category

Voicemail Greeting x

#### Language

American English

#### Voice

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)



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

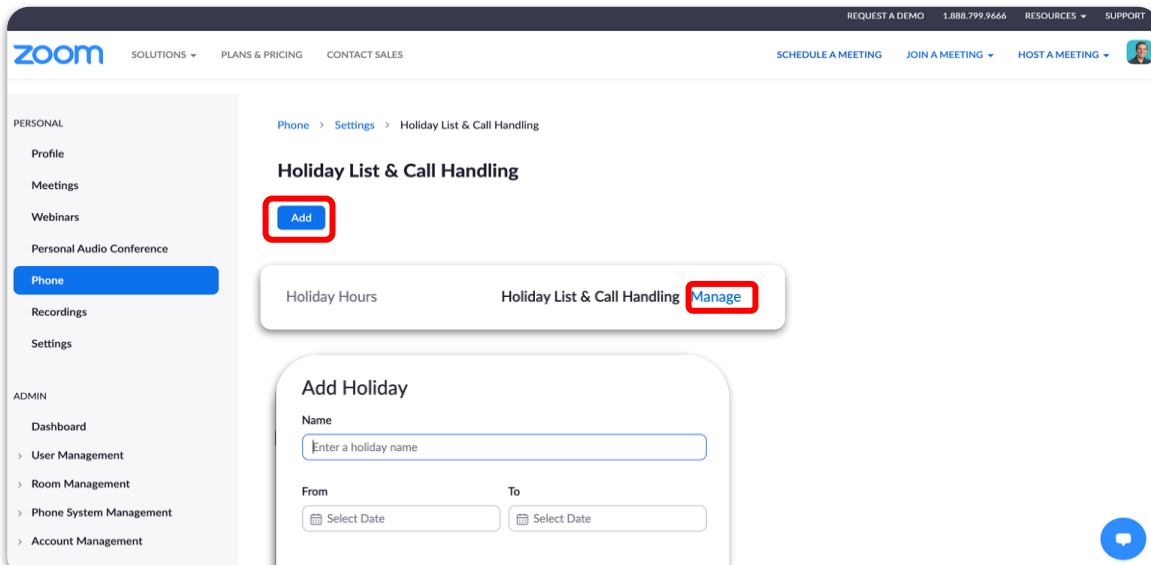
#### Record Audio

Click the record button to start recording

00:00 / 04:00

#### Visibility

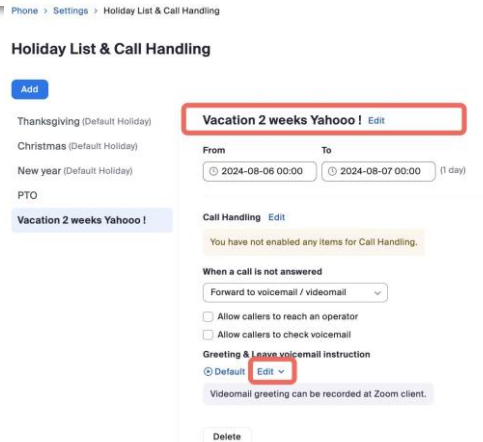
☒ Personal Audios ☐ Asset Library (Public)



# 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](#).

The screenshot displays the Zoom Admin Console interface. The top navigation bar includes links for 'REQUEST A DEMO', '1.888.799.9666', 'RESOURCES', and 'SUPPORT'. The main header shows 'zoom' and navigation links for 'SOLUTIONS', 'PLANS & PRICING', 'CONTACT SALES', and 'Holidays List & Call Handling'. The 'Delegation & Assistant' section is active, showing a 'Delegation' dropdown menu. A modal window is open, displaying a list of users to assign delegation privileges to. The modal also shows the 'Delegation Privileges' section with checkboxes for 'Place Calls', 'Answer Calls', and 'Pick Up Hold Calls'. The 'Delete Delegation' button is visible at the bottom of the modal.

zoom SOLUTIONS PLANS & PRICING CONTACT SALES Holidays List & Call Handling Manage SCHEDULE A MEETING JOIN A MEETING HOST A MEETING

Delegation & Assistant

Delegation ? Assign delegation privileges to

User Enter user name, email or Ext. Send Invite Cancel

#Vincent\_king@zoom.us - Ext. king, CN/ZJ - HangZhou  
- 📞 (king@gmail.com) - Ext. king (Inactive), Main Site  
A king@zoom.us - Ext. king (Inactive), Main Site  
Aakash king@zoom.us - Ext. king (Inactive), US/CA - San Jose  
Aamir king@zoom.us - Ext. king, Main Site  
Aamir king@zoom.us - Ext. king US/XX - Remote  
Aaren king@zoom.us - Ext. king, US/CO - Denver

Desk Phone

Keys & Positions Primary Number ? (619) 415-king View or Edit

Desk Phone(s) Phone Screen Lock ?

Delegation ? Assign delegation privileges to Add

Shaun king PTO ... x  
Ext. king

Delegation Privileges

✓ Place Calls ✓ Answer Calls ✓ Pick Up Hold Calls

Delete Delegation

# Configure Zoom Phone

## Delegation



When a new delegation comes in, click [View](#).



Select [Accept](#).

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

REQUEST A DEMO 1.888.799.9666 RESOURCES SUPPORT

### Delegation & Assistant

Delegation ⓘ

Assign delegation privileges to [Add](#)

Tyler Ext. 1234 × Collin Ext. 1234 (Pending) ×

Delegation Privileges

☒ Place Calls ☒ Answer Calls ☒ Join Calls ⓘ ☐ Opt In/Out ⓘ ☒ Pick Up Hold Calls

[Delete Delegation](#)

Assistant for ⓘ

Tyler Ext. 1234 (Site: Main Site)

Able to Place Calls

Desk Phone

Keys & Positioning

Desk Phone(s)

### Accept request

Do you want to accept Tyler Ext. 1234's delegation request?

[Cancel](#) [Accept](#)

### Delegation Request

You have a new delegation request.


[View](#)


# Configure Zoom Phone

## Other Settings


zoom SOLUTIONS ▾ PLANS & PRICING CONTACT SALES REQUEST A DEMO 1.888.799.9666 RESOURCES ▾ SUPPORT



SCHEDULE A MEETING JOIN A MEETING ▾ HOST A MEETING ▾

Desk Phone(s) Phone Screen Lock 


PIN Code  \*\*\*\*\* [Show or Edit](#)



Others

Voicemail Access  [Add](#)


Jacob  (Current User)  
Ext. 


Blocked List [View or Edit](#)

Block Calls without Caller ID 

Hold Music  Default  [Audio Library](#)

Audio Prompt Language Set the default audio prompt language for your extension.

American English 

User Status Active 



Voicemail Access



Blocked List



Hold Music



Language

# Personal Contacts

PERSONAL

Profile

Meetings

Webinars

Phone

Personal Contacts

Personal Devices

Whiteboards

Notes NEW

Surveys NEW

Recordings

Settings


Analytics & Reports

ADMIN

Dashboard

> User Management

## Personal Contacts



No contacts added to your Zoom account.

[+ Import from CSV File](#) [+ Add Contact](#)

For Google Calendar, Microsoft Exchange, and Microsoft Office 365, sync your contacts [here](#).

# 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.

The screenshot shows the Zoom web portal's 'Profile' settings page. The left sidebar has 'Profile' highlighted. The main content area shows various settings: Language (English), Date and Time (Pacific Time), and Sign-In Password. A red box highlights the 'Calendar and Contacts Integration' section, which includes a link to 'Configure Calendar and Contacts Service'. At the bottom, there is a 'Download' section with links to the Zoom app and other resources.

# Using Zoom Phone Desktop Client



# Signing into the Zoom app

The image displays two overlapping screenshots of the Zoom application's login interface. The background screenshot shows the main login screen with the Zoom logo at the top, a blue 'Join a Meeting' button, and a white 'Sign In' button. Below these buttons, it indicates the version: 'Version: 5.11.11 (10514)'. The foreground screenshot shows the 'Sign In' form. It features the Zoom logo with a dropdown arrow. Below the logo are two input fields: 'Email' and 'Password'. To the right of the 'Password' field is a link that says 'Forgot?'. Below the input fields is a grey 'Sign In' button. Underneath the button is a checkbox labeled 'Keep me signed in' which is checked. Below this is a separator line with the text 'or sign in with'. Under the separator line are four social login options: SSO (represented by a key icon), Apple, Google, and Facebook. At the bottom left of the foreground screenshot is a '< Back' link, and at the bottom right is a 'Sign Up' link.

# Zoom Desktop App

## Home Screen Settings

### Set Up Call Forwarding

☒ Name or Number ☐ Voicemail / Videomail

**Forwarding Contact**

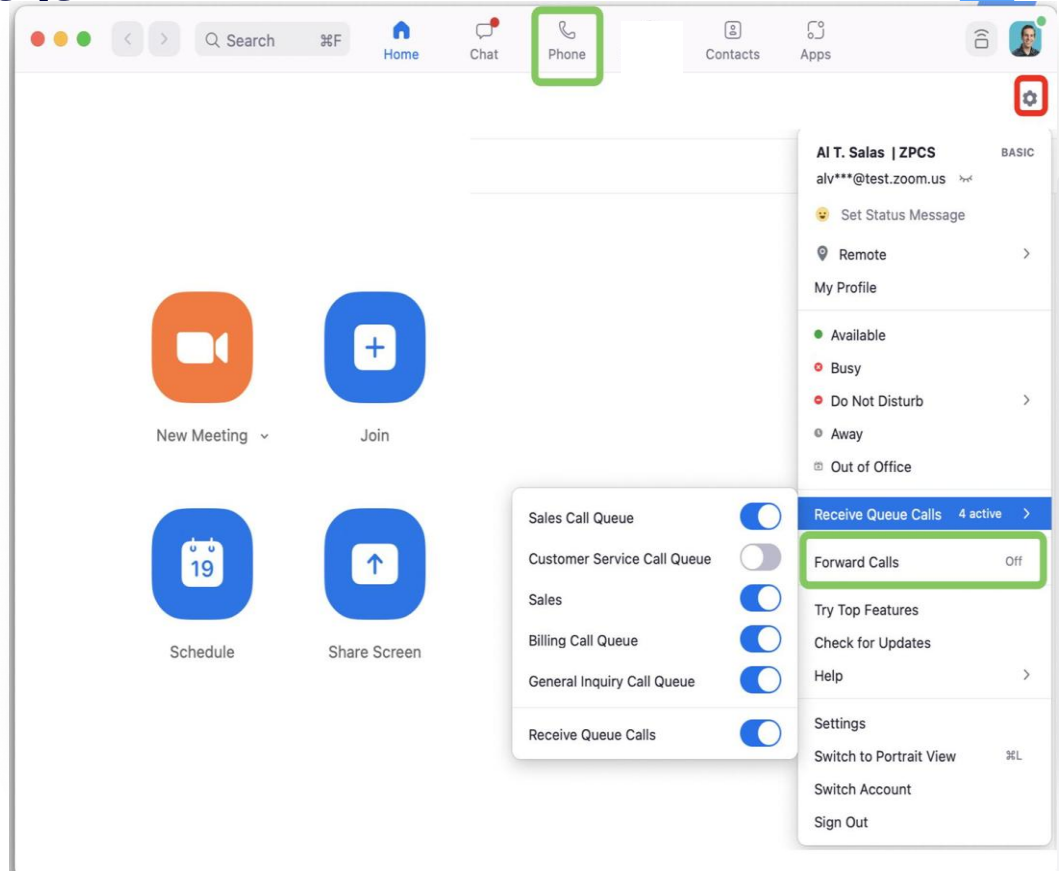
Enter a name, number or extension

**Forwarding Duration**

1 hour

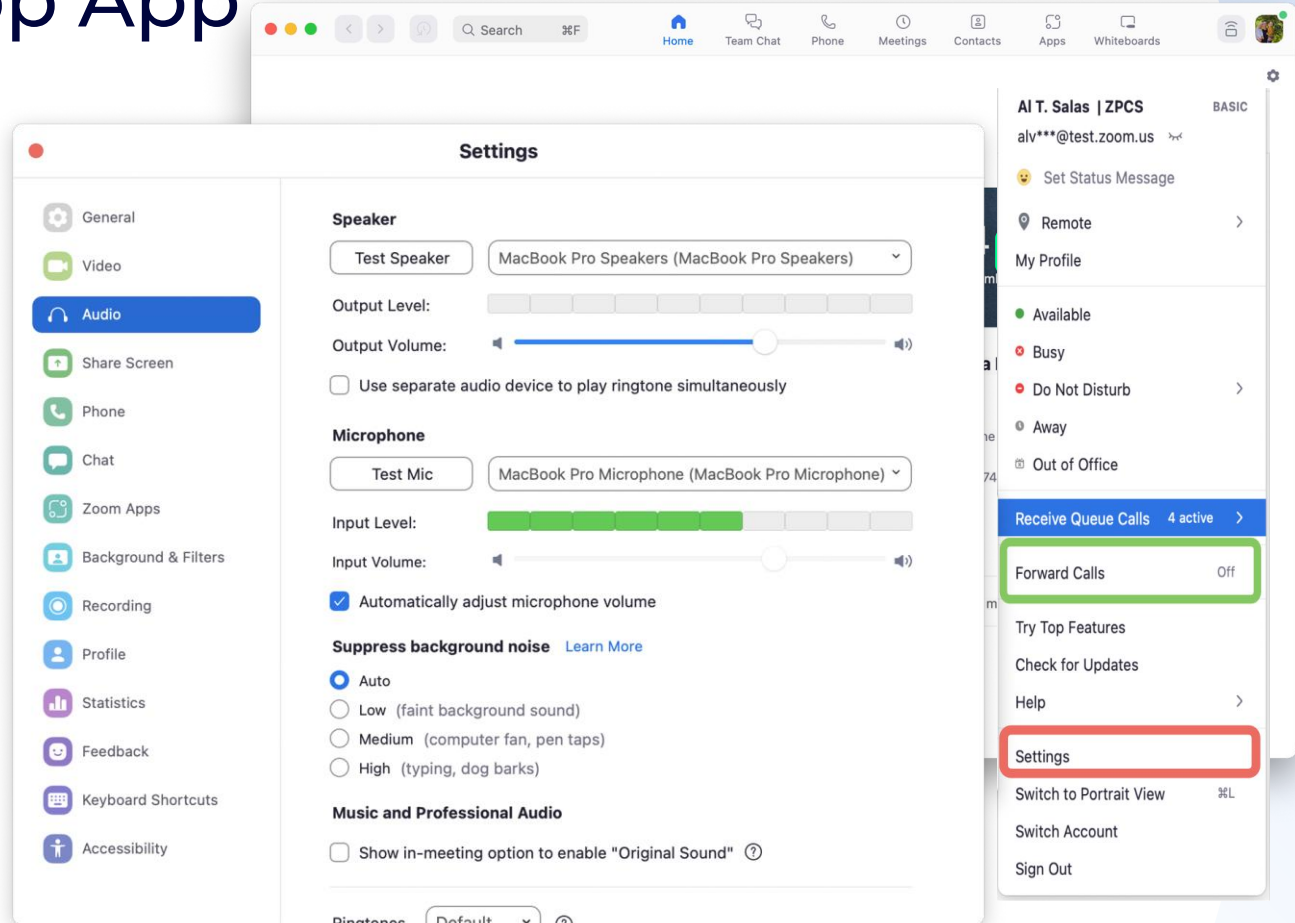
- 15 minutes
- 30 minutes
- 1 hour ✓
- 2 hours
- Always

Cancel Save



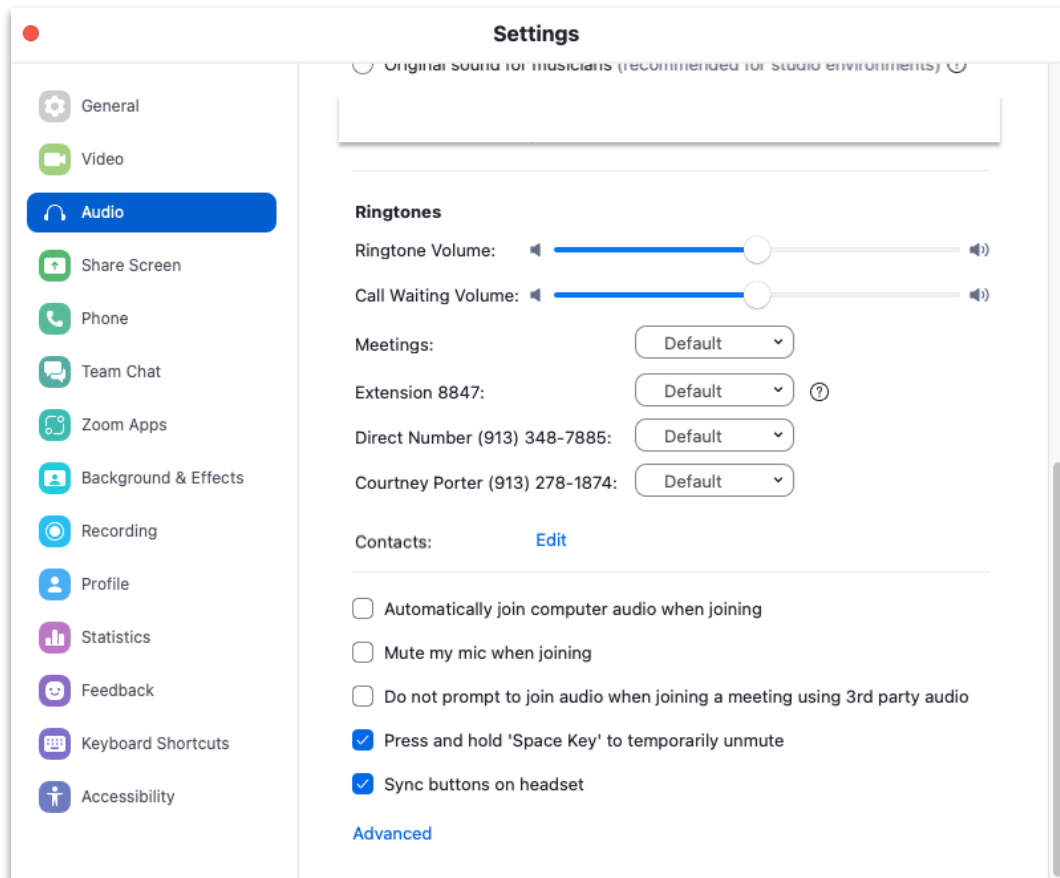
# Zoom Desktop App

## Audio Preferences



# Zoom Desktop App

## Audio Preferences

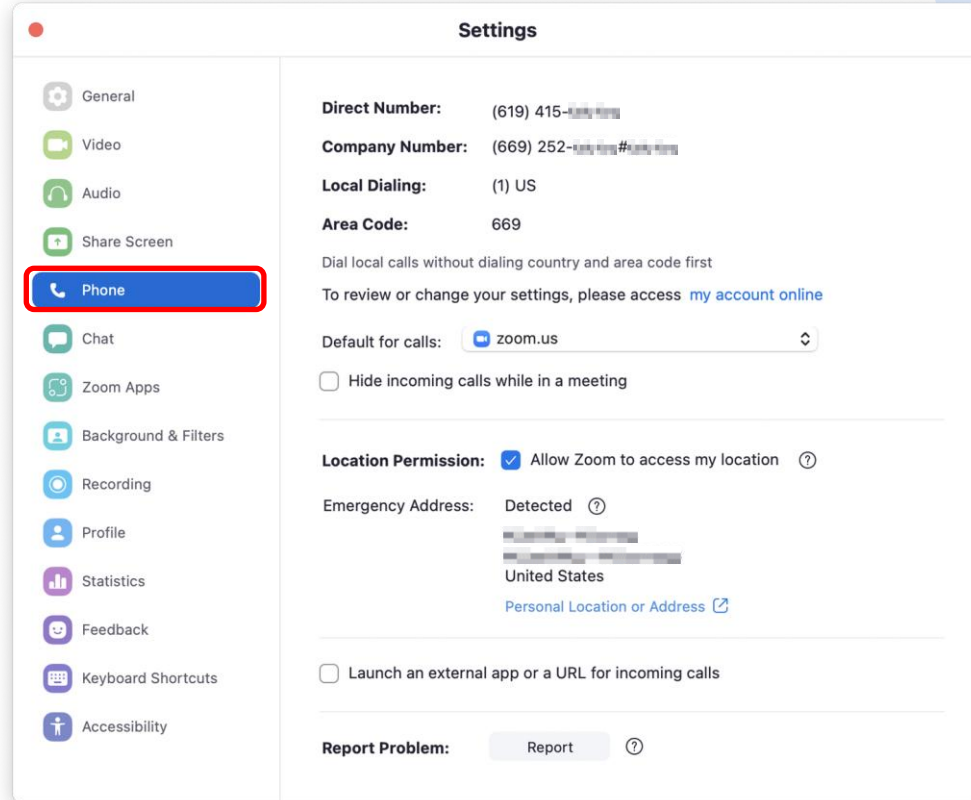


# Receiving Zoom Phone Call while on Zoom Video Meeting



# Zoom Desktop App

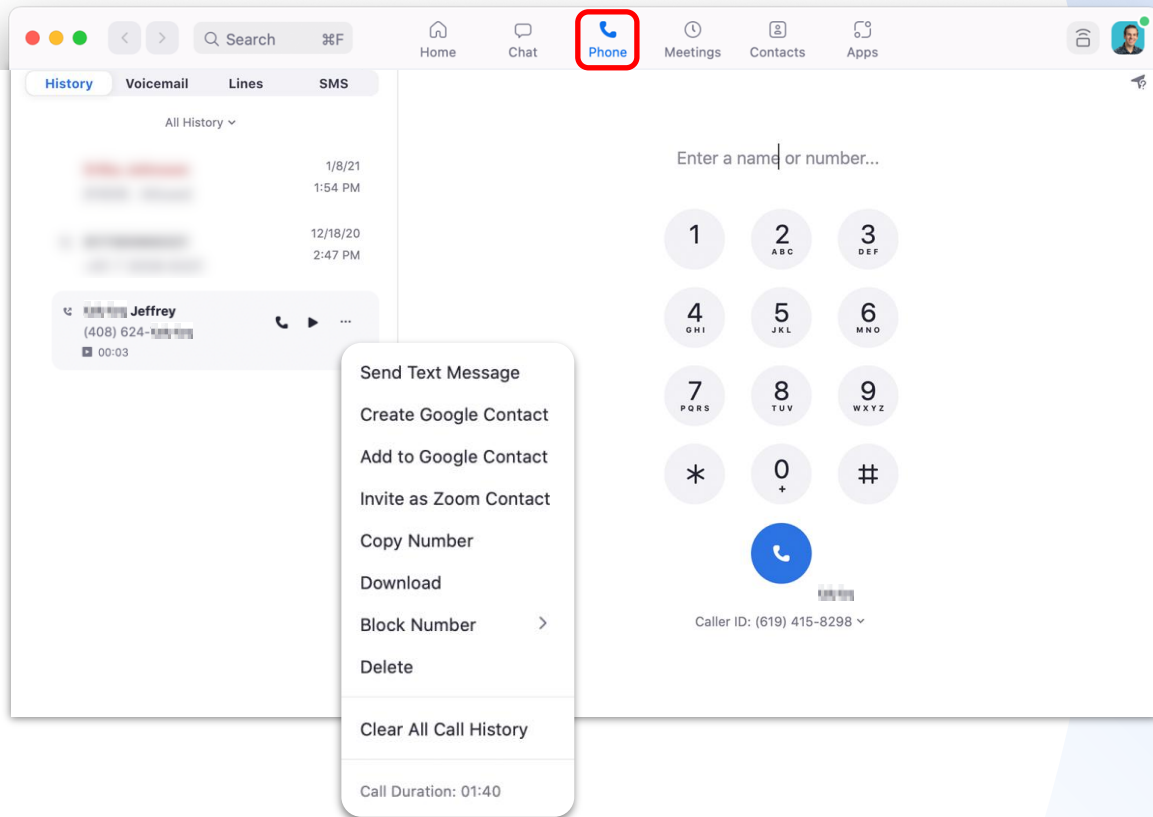
## Zoom Phone Settings



# Zoom Desktop App

## History

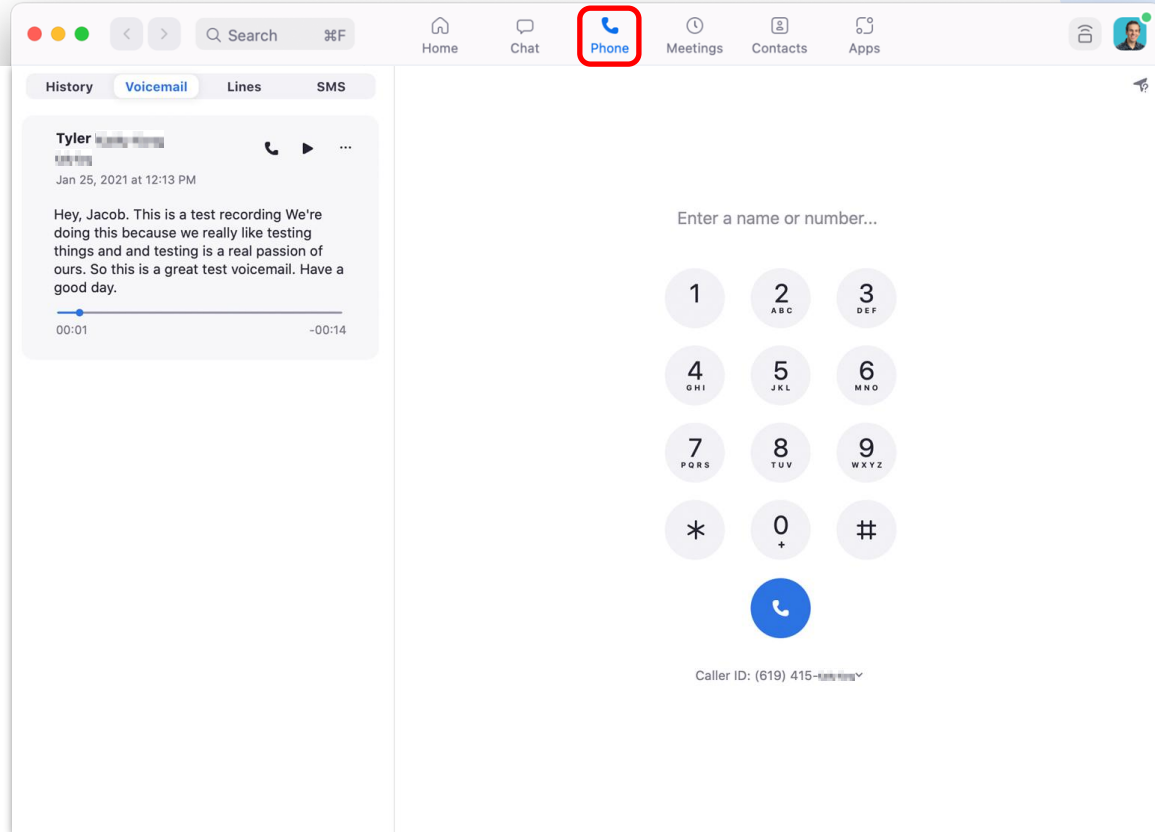
- ✓ Send **Text** Message
- ✓ Create **Contact**
- ✓ **Copy** Number
- ✓ **Block** Number
- ✓ **Clear** Call History



# 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 Desktop App Lines



Click **v** next to caller ID to choose what line you would like to call out on.

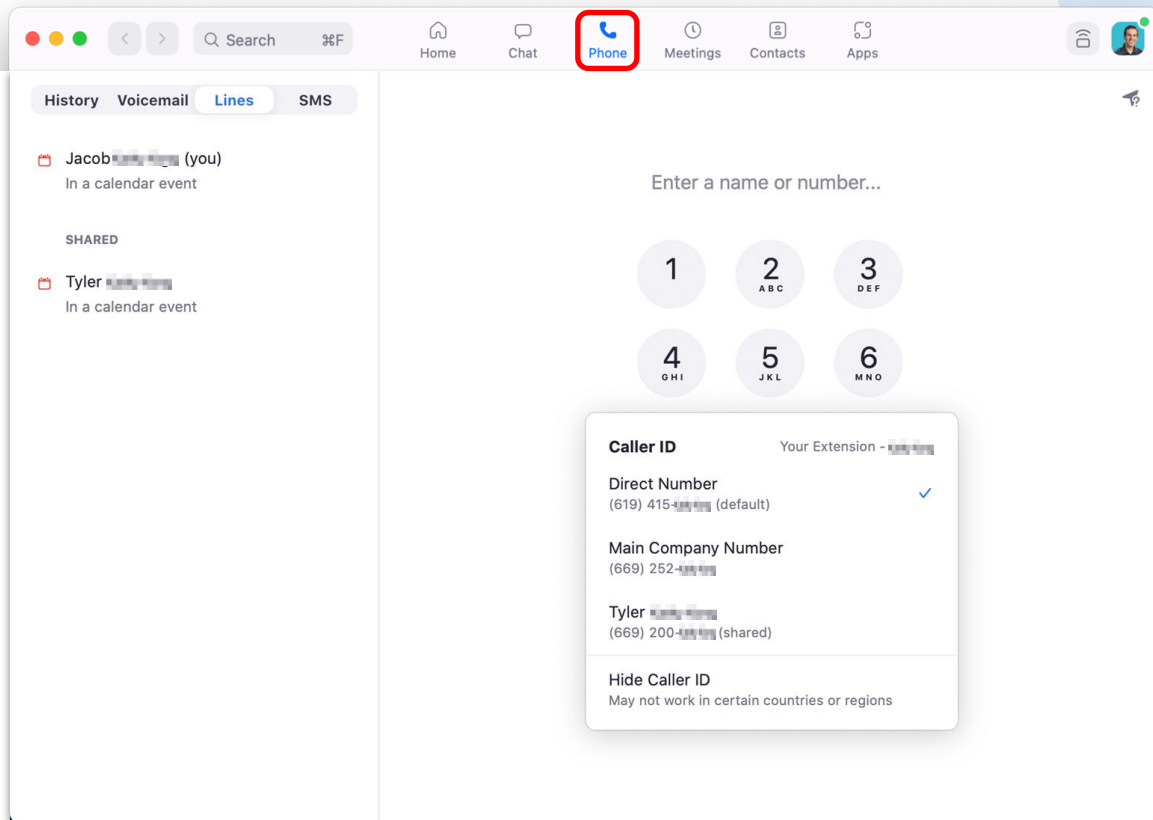


Then enter a name or number.



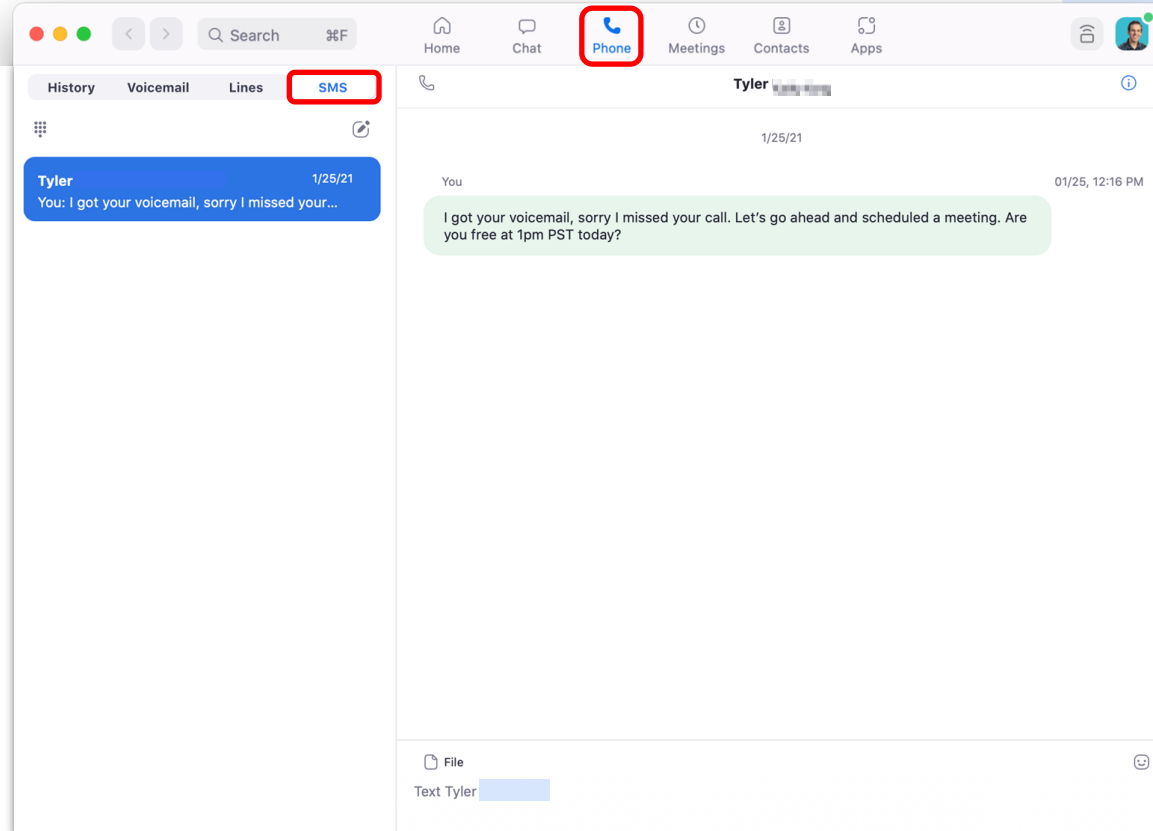
Place the call by pressing the **phone icon**.

- If you have any shared lines they will show on the menu on the left.
- The user's presence will also show to the left of their name.



# Zoom Desktop App

## SMS



# Zoom Desktop App

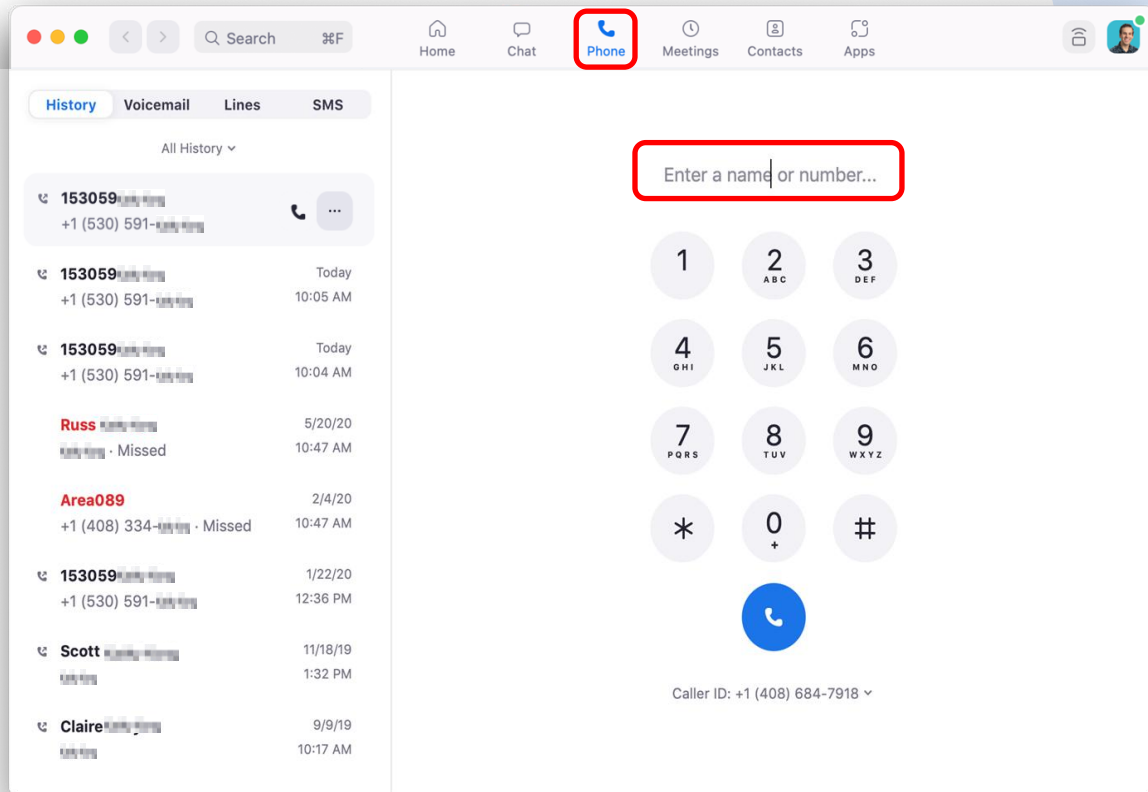
## Placing a Call



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.

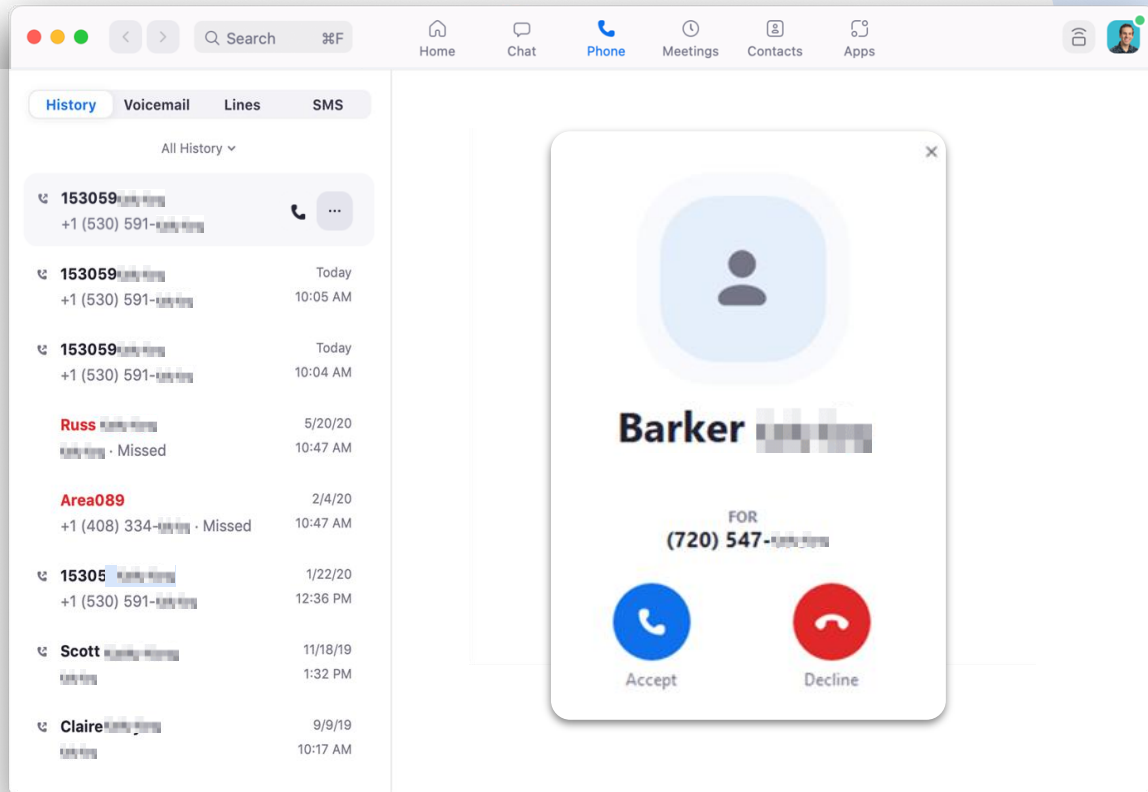


Use the pop up to see who is calling before you answer.



The **For** section will show who the caller is trying to reach:

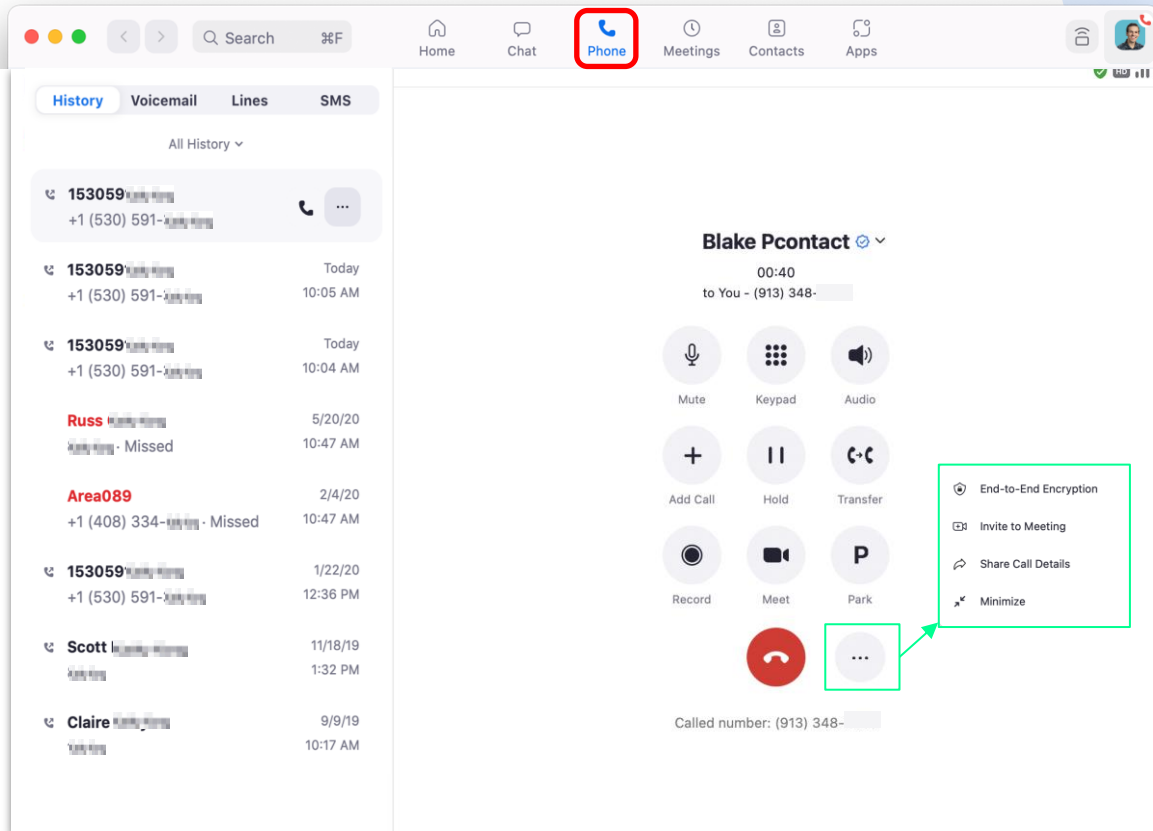
- Your personal line
- Someone for whom you are a delegate
- Call Queues you're a member of
- Your Shared Lines, etc.



# 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

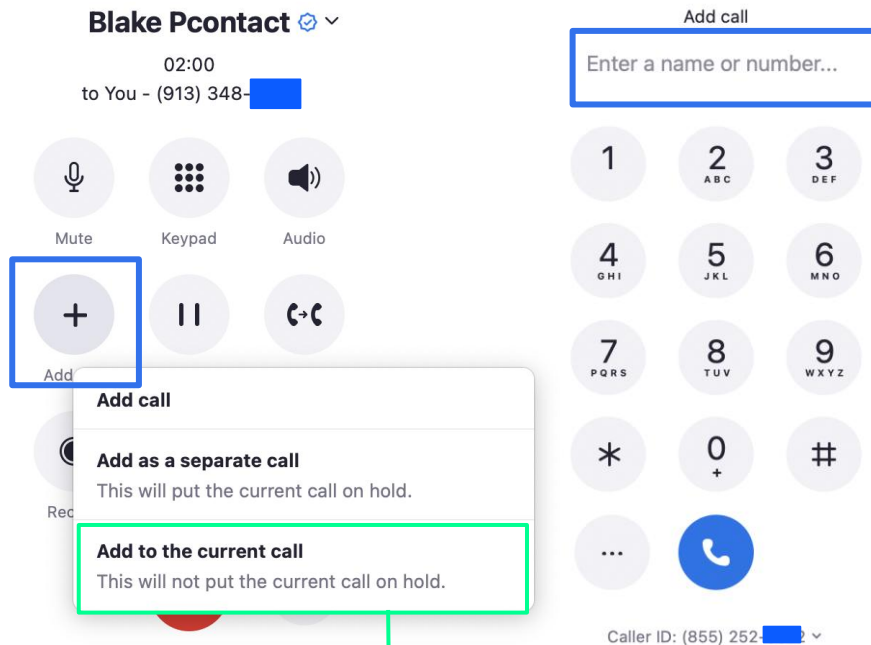
The sequence of screenshots illustrates the process of transferring a call in the Zoom Desktop App:

- Step 1:** The Zoom Desktop App interface shows the call controls. The **Transfer** button (represented by two overlapping circles) is highlighted with a blue box.
- Step 2:** A "Transfer to" dialog box appears, prompting the user to "Enter a name or number...". The input field is highlighted with a blue box.
- Step 3:** A modal window displays three transfer options:
  - Warm Transfer** (highlighted with a blue box): Speak to the new agent before transferring.
  - Blind Transfer**: Transfer without speaking to the new agent.
  - Transfer to Voicemail**: Transfer directly to the new agent's voicemail.A "Cancel" button is at the bottom.
- Step 4:** The "Complete transfer" button at the bottom of the modal is highlighted with a blue box.

- Click on the Transfer button
- Enter the name, number, or ext
- Select the transfer method
- Complete the Transfer

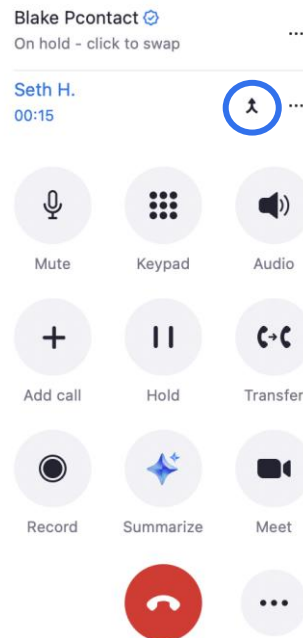
# Zoom Desktop Client

## Active Call: 3 Way Conference

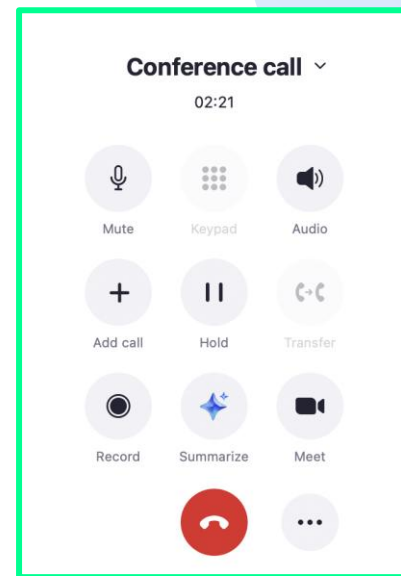


- Click Add Call

- Enter in the name, number, or ext



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

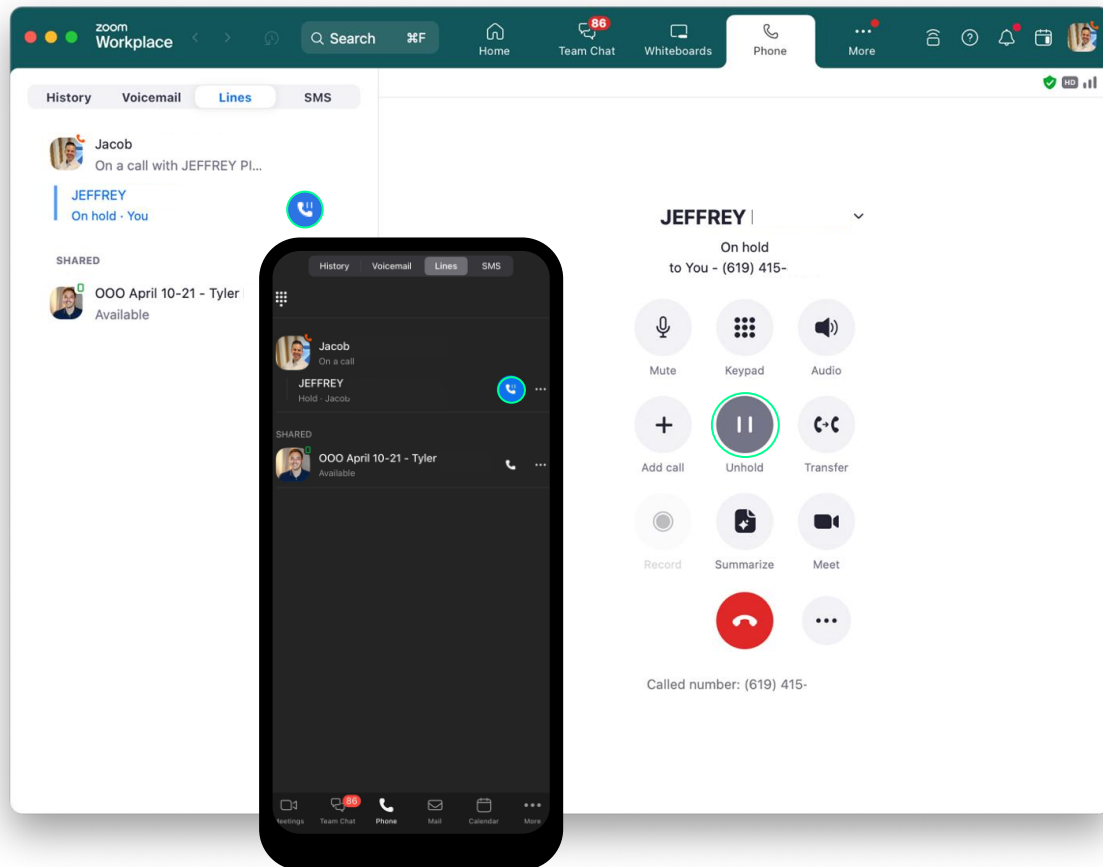


# Zoom Desktop Client



## Call Flip

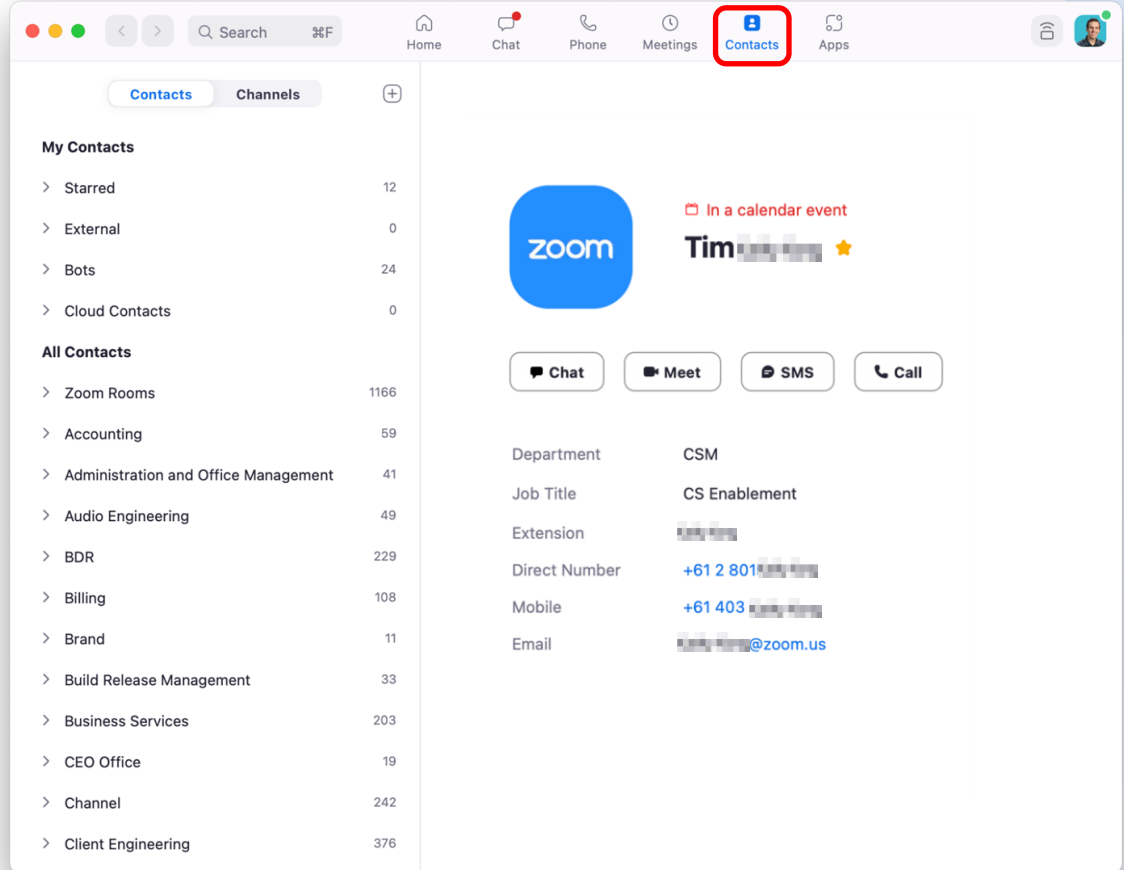
- Call flip allows you to place your current Zoom Phone call on hold and answer it on another device.  
(*Zoom desktop client, mobile app, or provisioned desk phone*).
- Place the call on **Hold**.
- On another device you are logged into, click **Phone**, then select **Line**.
- **Unhold**: Click the 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.

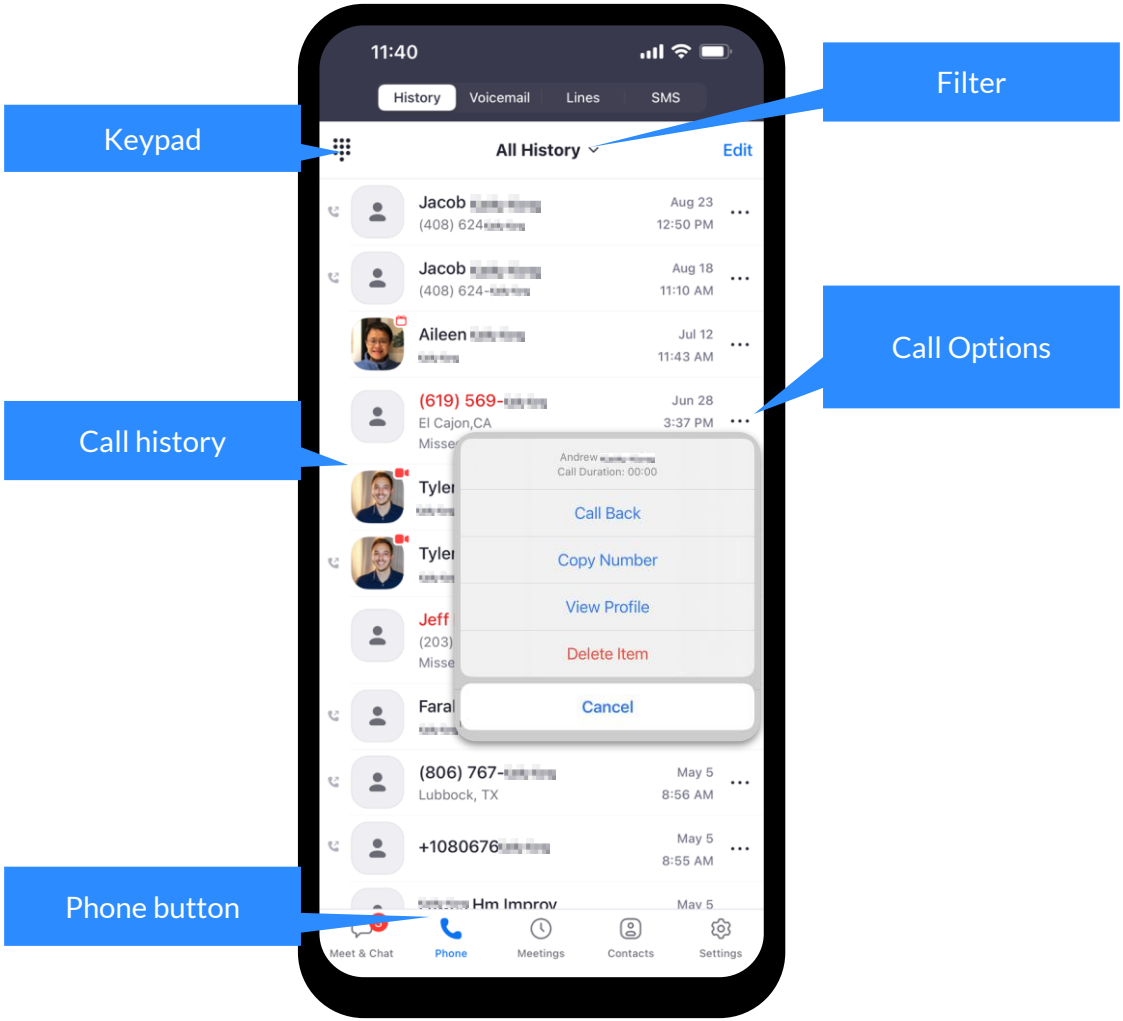


## On a Call

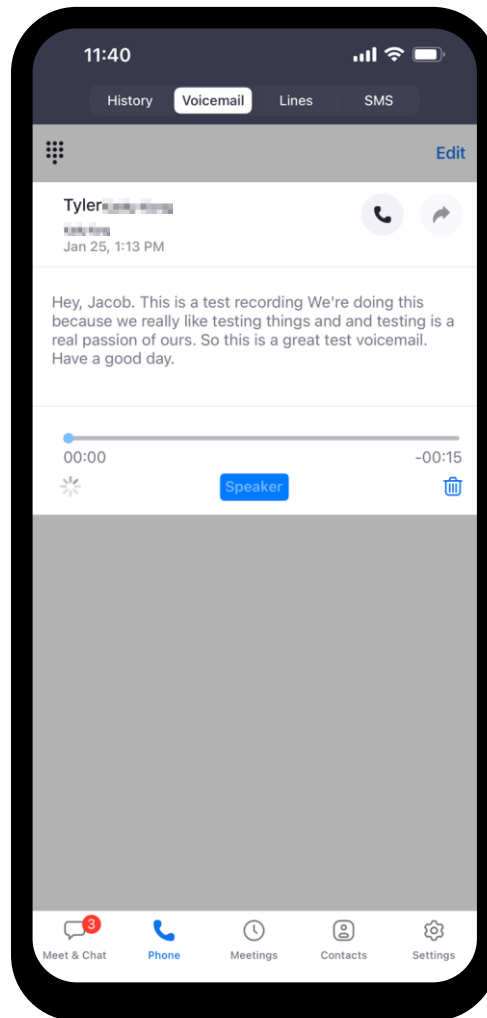
Contact is on a Zoom Phone call using the Zoom desktop client or mobile app.

# Zoom Mobile App

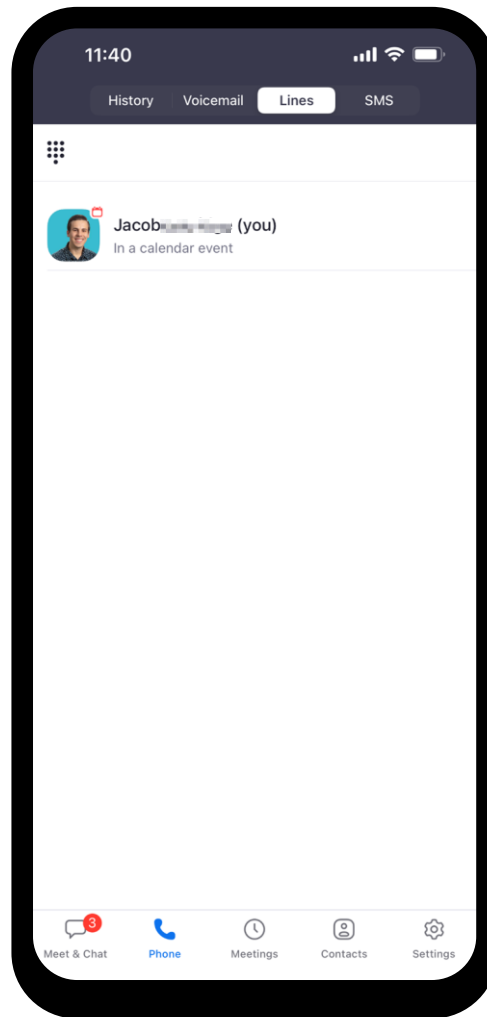
# History



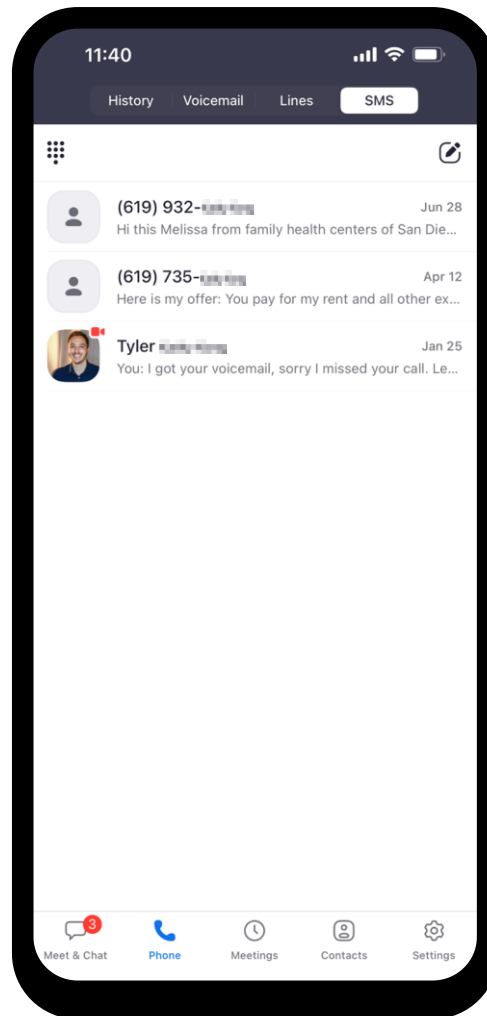
# Voicemail



# Lines

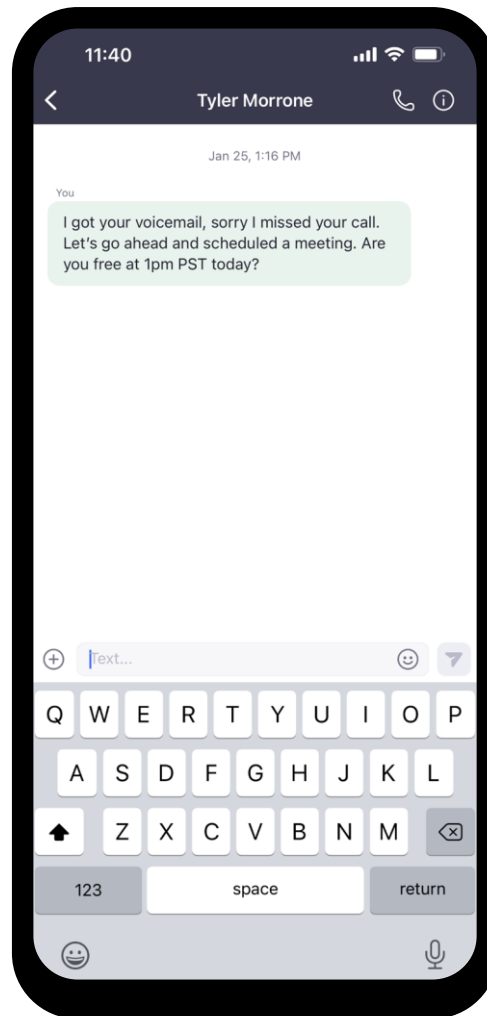


# SMS

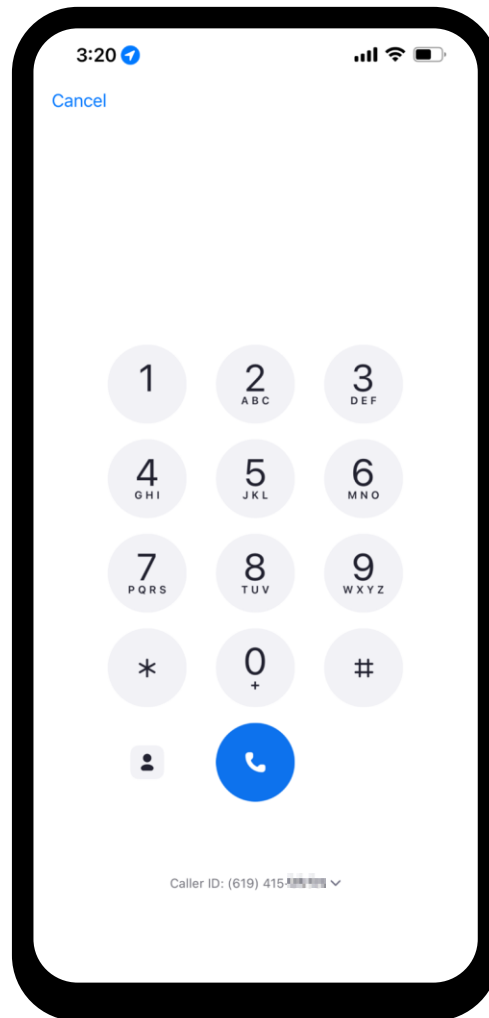




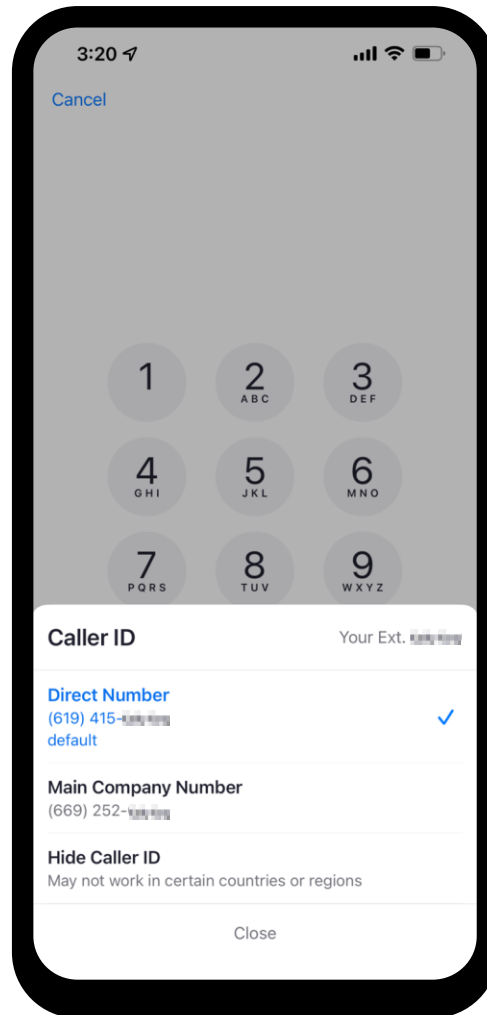
# SMS



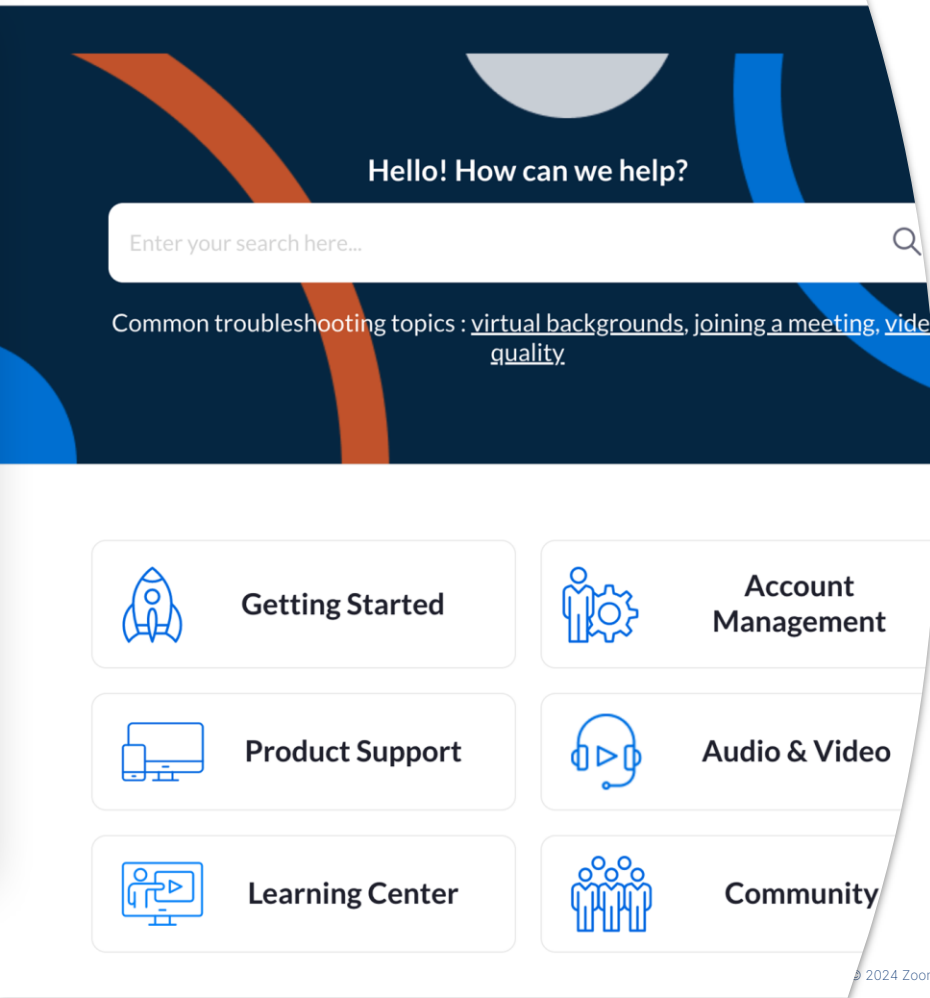
# Place a Call



# Choose Caller ID



# Resources & Support



# Resources & Support

- ✓ Please go to [support.zoom.us](https://support.zoom.us).
- ✓ [Search](#) through Zoom's knowledge base for related content.
- ✓ Browse through [Quickstart Guides](#), [Video Tutorials](#), or specific [Support Topics](#).