

Getting Started with Zoom Phone - from your laptop/desktop or mobile app

How to change your phone settings

1. Sign in to the Zoom web portal. <https://us02web.zoom.us/>
2. Click **Phone**.
3. Click the **Settings** tab to view the following information and options:

Note: Settings marked with an asterisk (*) are only visible if they apply to you. For example, you will only see **Desk Phone(s)** if you have assigned desk phones.

- a. **Site:** Displays the site you belong to (if your admin enabled multiple sites for your organization).
- b. **Package:** Displays your current calling plan for outbound calls.
- c. **Number(s):** Displays the direct phone numbers assigned to you.
- d. **Company Number:** Displays the main company number and your extension number.
- e. **Emergency Addresses**  : Add or update your emergency address provided to first responders when dialing an emergency number.
- f. **Outbound Caller ID**  (only visible if you were assigned a calling package): Select the default caller ID number when using the Zoom desktop client or mobile app to make a call. You can change the outbound caller ID number before making a call.
Note: Select Hide Caller ID to hide your caller ID by default. This setting doesn't apply to desk phones. Change line key settings to set the default outbound caller ID for desk phones. Review the features and limitations of your outbound caller ID number.
- g. **Country:** Select the country code used for outbound dialing.
- h. **Area Code (optional):** Click Set or Edit to change the area code used for local calls. When you dial a number without an area code, Zoom Phone will use this area code.

Call Handling

Note: Make sure the phone user **set the correct time zone** in your profile.

After setting custom hours, you can **customize how inbound calls are routed** during these hours.

- **Business Hours:** Click Edit to change the times when you can answer calls. You can set business hours to span past 11:30 PM. This could be used if you work night shifts. You can also set business hours in increments of 10 mins by manually entering a time; for example, 11:10 PM.
- **Closed Hours:** If you customized business hours, you can also set closed hours.
- **Holiday Hours:** Click Manage to designate certain days are holidays.

How to make a call -

1. In the Zoom desktop client or mobile app, click or tap the Phone tab.
2. Enter a name, number, or extension.



3. Click or tap the blue phone icon .



How to transfer a call

1. While on a call, click or tap Transfer.
2. Enter the name of the person to transfer to.

3. Click or tap the blue transfer icon.
4. Select the transfer method.



How to send and receive an SMS (text message)

1. In the Zoom desktop client or mobile app, click or tap the Phone tab.
2. Click or tap the SMS tab.
3. Click or tap the pencil icon .
4. At the top, enter the phone number.
5. At the bottom, enter your message then press Enter on your keyboard.



How to check your voicemail

1. In the Zoom desktop client or mobile app, click or tap the Phone tab.
2. Click or tap Voicemail.
3. Locate the voicemail you want to listen to, and click or tap Play.



How to change your voicemail greeting

1. Sign in to the [Zoom Web Portal](#).
2. In the navigation menu, click Phone then Settings.
3. Under Call Handling, click Audio Library.
4. Click Add Audio.
5. Record a new greeting or Upload a file.

Getting started with Zoom Phone (users)

This is for the desktop/laptop and mobile app systems. You will receive a separate handout for your physical phone.

<https://support.zoom.us/hc/en-us/articles/360028936531>

HistoryVoicemailRecordingSettings

From07/20/2023To07/26/2023

Q Search by Name, Ext. or Number

Status (All)Type (All)

	From	To	Type	Voicemail	Shared By	Time	
	Phil Robinson Ext. 43552	Bonnie Lasorsa Ext. 43544	Normal	0:00:07	--	Jul 26, 2023, 11:06 AM	Download

Page Size100Total 1

0:00:07 / 00:07

Hi, Bonnie! It's Phil. I'm just leaving you a voicemail because you asked me to. Thanks, bye.

Transcription completed

Close

New Voicemail from Phil Robinson (Ext. 43552) to Bonnie Lasorsa (Ext. 43544) on Wed Jul 26, 2023 11:06

Zoom <no-reply@zoom.us> to me

zoomSIGN IN

You have a new voicemail

TimeWed Jul 26, 2023 11:06

FromPhil Robinson (Ext. 43552)

ToBonnie Lasorsa (Ext. 43544)

Duration00:07

Voicemail Transcription

"Hi, Bonnie! It's Phil. I'm just leaving you a voicemail because you asked me to. Thanks, bye. "

To listen to this message, you can open the attachment or use any Zoom Applications to have instant access to all your messages.