



Getting Started



Getting Started

To ensure clear boundaries between professional and personal communication and to uphold data security practices, all CRAEA staff assigned a Zoom Phone number are expected to use their CRAEA Zoom Phone account for all work-related phone calls and text messages. This includes communications with internal AEA staff, families, school staff, and external partners.

Notice: The use of Google Voice is no longer supported by CRAEA.

Note as of 08/14/25: New Zoom Phone numbers will be assigned in the next several days.

Quick Links:

- **[Desktop Client Tutorial \(Computer\)](#)**
 - Installing the Zoom Phone Client on Your Desktop
 - Finding Your Zoom Phone Number
 - Accessing the Staff Directory on the Desktop Client
 - Sending a Text Message (SMS)
 - Transferring or Forwarding a Call
 - Setting Up Business Hours and Voicemail
 - Recording a Call
 - Switching a Call to a Zoom Meeting
 - Blocking a Number
- **[Mobile App Tutorial \(Cell Phone\)](#)**
 - Installing the Zoom Phone App on Your Mobile Device
 - Finding Your Zoom Phone Number
 - Making Calls and Using the Staff Directory
 - Sending a Text Message (SMS)
 - Transferring or Forwarding a Call
 - Setting Up Your Voicemail
 - Recording a Call
 - Switching a Call to a Zoom Meeting
 - Blocking a Number
- **[Advanced Features Tutorial](#)**
 - Customizing the Desktop Client Toolbar
 - Faxing with Zoom
 - Using AI Features During a Phone Call
 - Enabling or Disabling Zoom AI Companion Features
 - Managing Call Handling Settings
- **[Video Tutorials](#)**
 - Initial user settings on the web portal
 - User settings for call handling
 - Using the desktop client
 - Using the mobile app

- Adjusting audio settings
- In-call options (desktop client)
- In-call options (mobile app)
- Using Zoom Phone Assistant/Power Pack

➤ [**FAQ**](#)

- Changing Your Voicemail Greeting for Out-of-Office or Holiday Break
- Caller ID Name Not Displaying Correctly
- Number of Devices You Can Be Signed Into Simultaneously
- Troubleshooting a Weak Signal
- Receiving Phone Calls: Does Zoom Need to Be Running?
- Auto-Launching Zoom App on Startup (Windows and Mac)
- Updating the Zoom Desktop Client
- Zoom Agency Virtual Backgrounds Not Showing Up
- Camera Not Working in Zoom



Desktop Client Tutorial

Zoom Phone Desktop Tutorial

1. How do I install the Zoom Phone Client on my desktop?

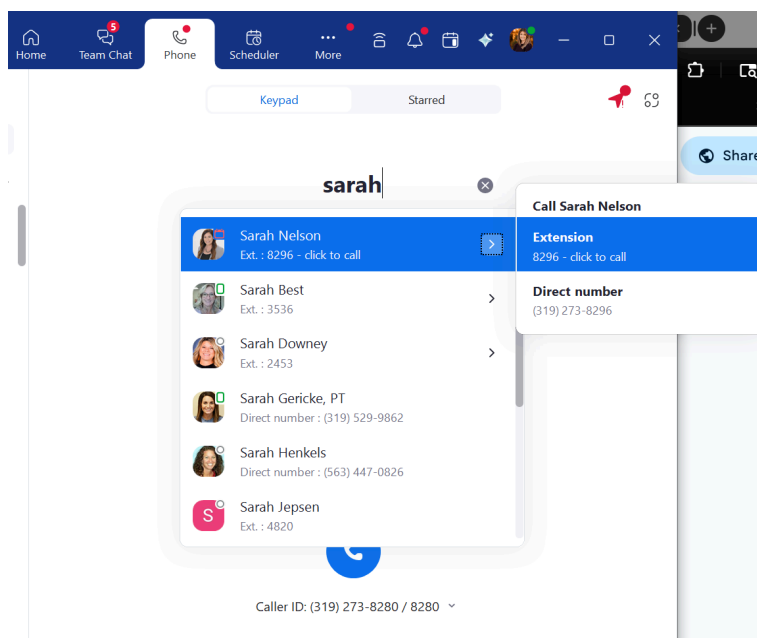
- Zoom Phone Client is pre-installed on your laptop and ready to use.
- If the Zoom Phone Client is malfunctioning, please uninstall and reinstall by navigating to zoom.us/download and click “Download (64-bit).”

2. What is my Zoom Phone Number?

- An email notification is sent to your CRAEA email.
- If you didn’t get an email notification, simply go to Zoom.us, log in with your CRAEA Google credentials, and select “My Account.” Next, go to “Profile” and view your “Company Number” and “Direct Number.”
- Your Zoom phone number will also appear in the [CRAEA Staff Directory](#) and within your email signature.

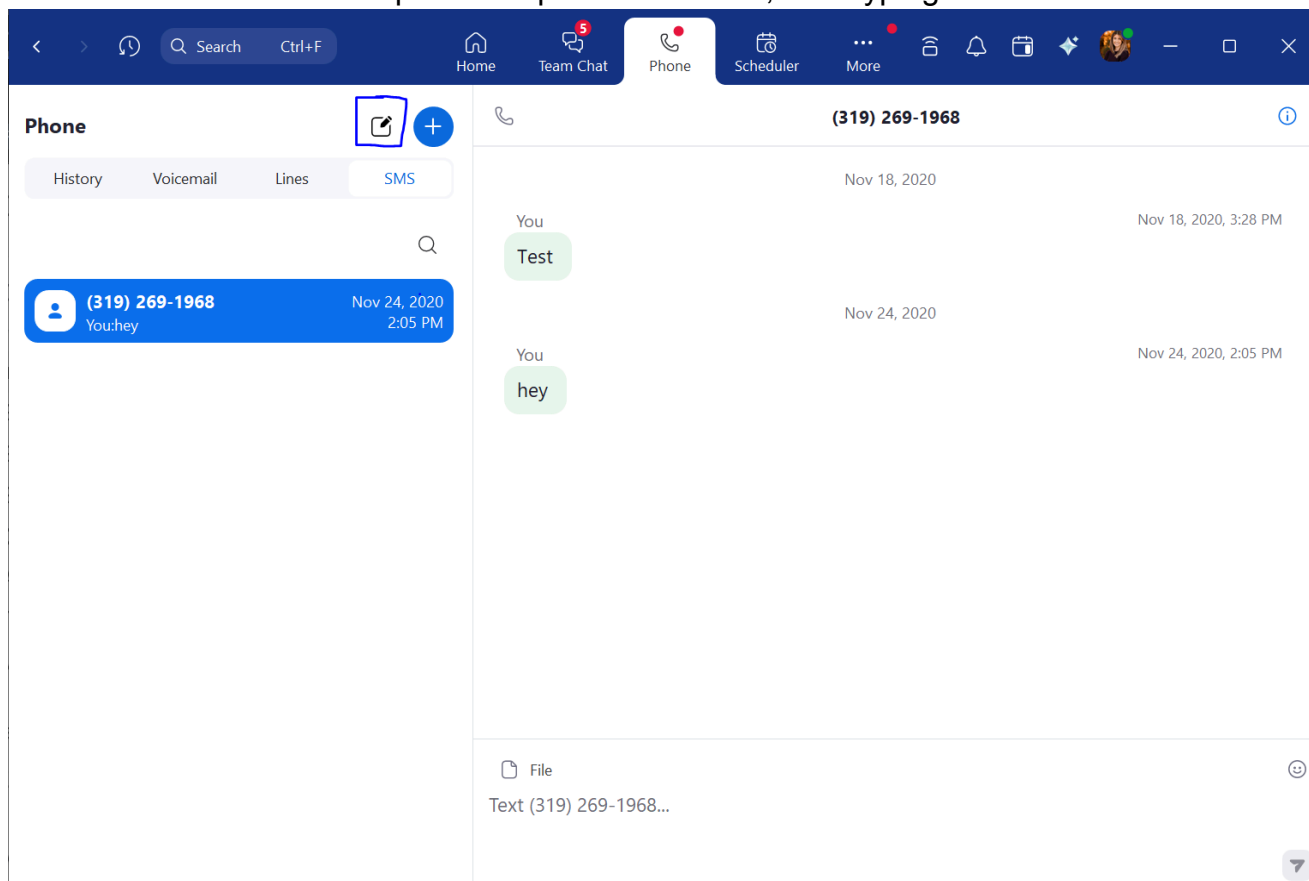
3. How do I access the Staff Directory on my desktop client?

- Open the Zoom desktop client and click the “Phone” icon in the top toolbar. Type the person’s name you’re calling in the search box where it says “Enter a name.” The contact will populate, and you can click on the name to call.



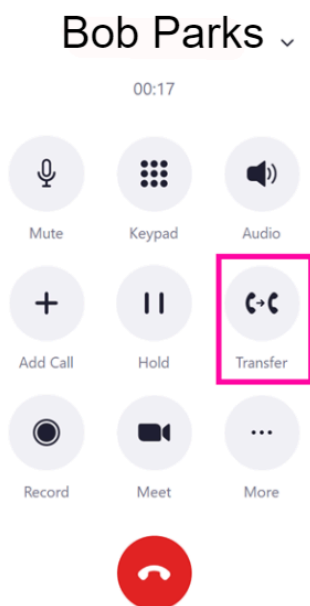
4. How do I send a text message?

- Click “SMS” and click the square and pencil icon  , start typing a name in the “To:” field



5. How do I transfer or forward a call?

- Accept the Incoming Call.



- Click the Transfer icon:

- The caller will automatically be placed on Hold. Enter a Name or Phone Number to transfer the caller to.

Transfer To

530 754 6354

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

Caller ID: (530) 754 2322

- Click the Transfer icon to transfer the caller.
- Select the desired Transfer option, speak to the person, or hang up.

Transfer To

530 754 6354

Warm Transfer
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

Cancel

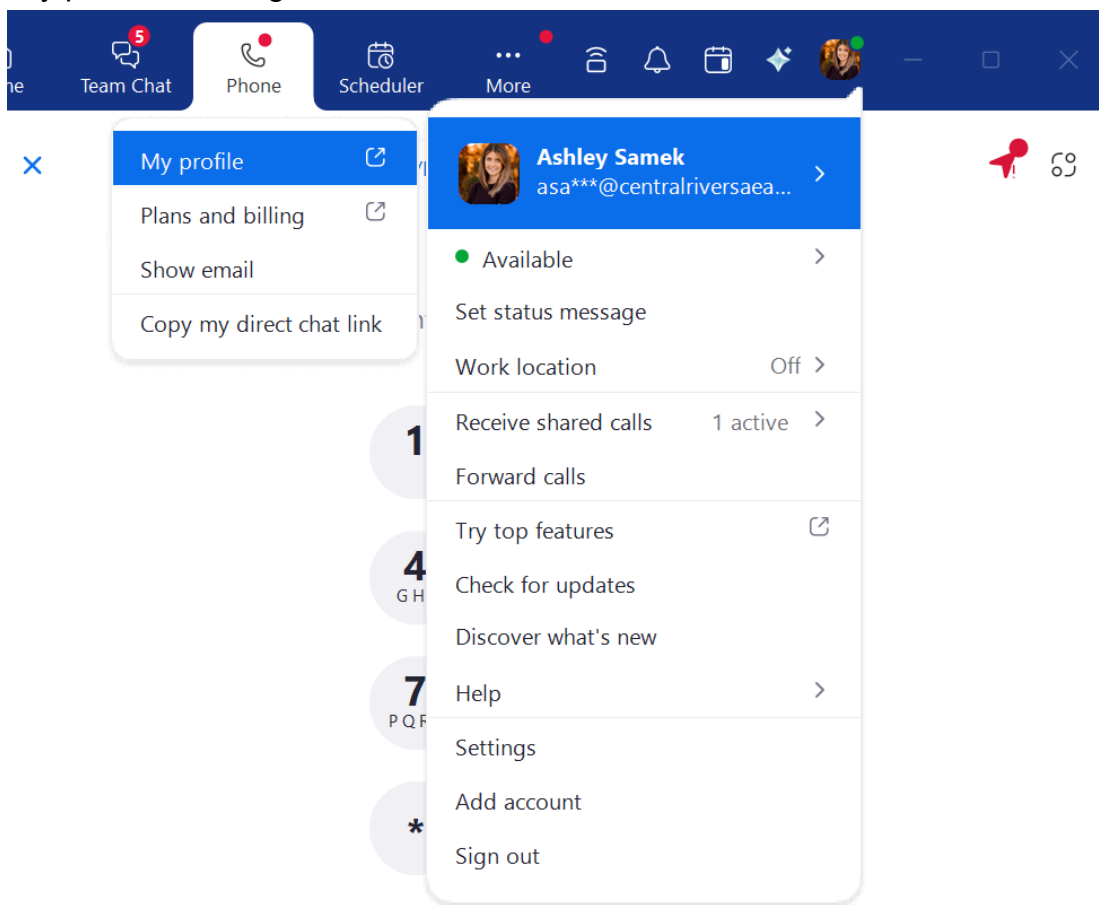


Caller ID: (530) 754 2322

6. How do I set up my Business Hours and Voicemail?

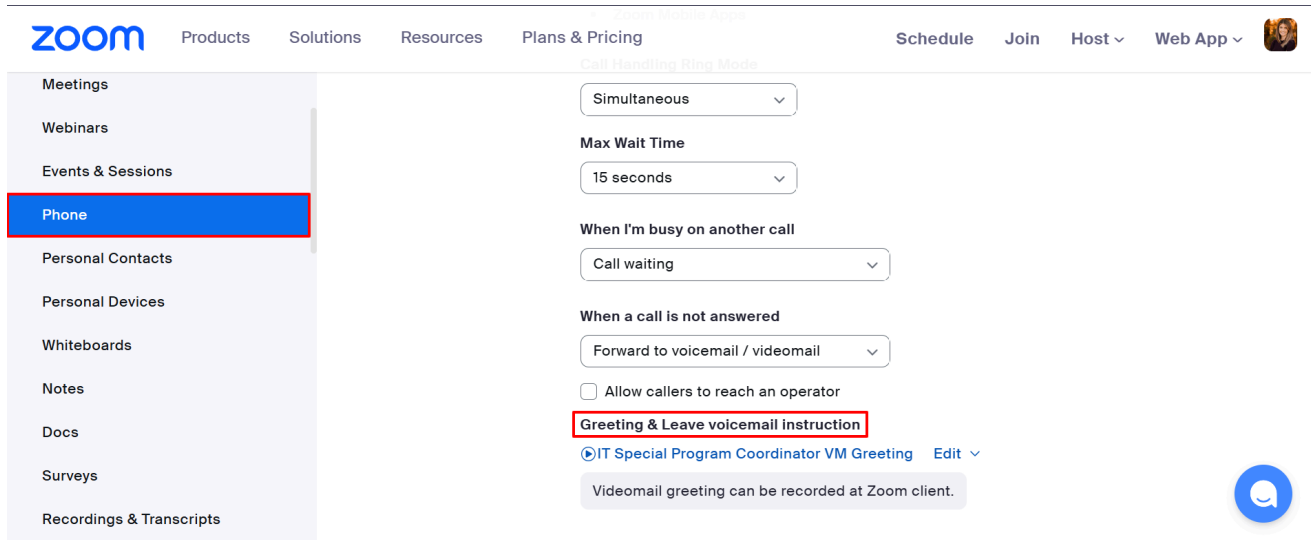
In-depth instructions for voicemail setup

- Voicemail is set up in the Zoom Web Portal. To get to it quickly from the Desktop Client, click on your profile picture in the upper right-hand corner, click on your name, click on “My profile,” and log in if needed.



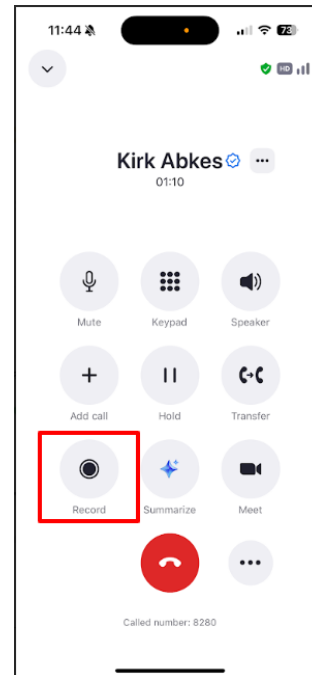
- Scroll down on the left menu to “Phone” and scroll down on the right-hand side to the “Call Handling” section.

- Click “Edit” and set up your “Business Hours”, and then scroll a little further to the “Greeting & Leave voicemail instruction” section. Click “Edit” to add your audio.

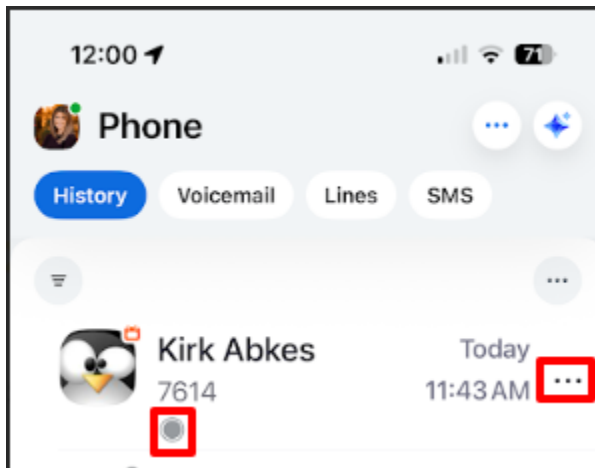


7. How do I record a call?

- Start the phone call and click the “Record” icon.

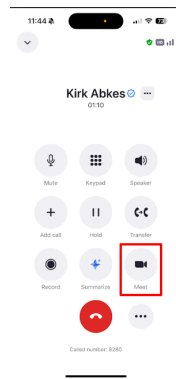


- Click “History” and click the ellipsis “...” to play the call recording



8. How do I switch a call to a Zoom meeting?

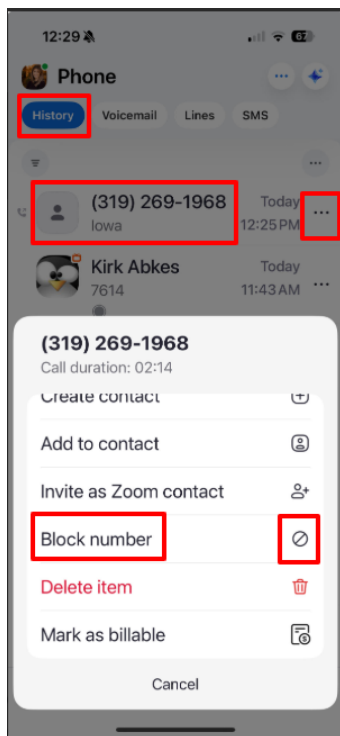
- Place a call or answer an incoming call. In the phone menu, click the “Meet” icon and it will automatically turn your phone call into a Zoom meeting with video and other



meeting features.

9. How do I block a number?

- Click “History” and click the ellipsis “...” scroll down to “Block number”





Mobile App Tutorial



Zoom Phone Mobile App Tutorial

Zoom Phone From the Mobile App Directions

1. How do I install the Zoom Phone App on my cell phone?

- Open the App Store on your Mobile device.
- Tap the **Search** icon (magnifying glass). **Type** “Zoom Workplace” in the search bar and install.
- Log in with CRAEA Google credentials

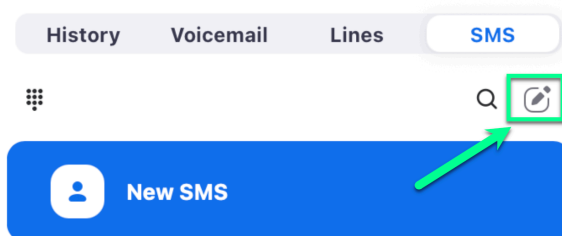
2. What is my Zoom Phone Number?

- Sign in to the Zoom Workplace app with your CRAEA email.
 - *If “Continue with Google” appears as an option, that is the quickest way to sign in if you have Gmail set up on your mobile device.*
- Click your profile image in the top left corner next to “Home”. Click “My profile” and scroll down to see your contact info.

3. How do I access, make a call, and use the Staff Directory within my Zoom phone?

- Click the “Phone” icon in the bottom toolbar
- Click the blue “+” sign  in the lower righthand corner and enter a name
- Click the silhouette icon next to the phone icon to see your contacts.
- Or click “More ...”, click “Contacts”, and search for contacts

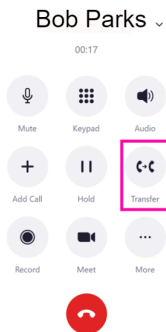
4. How do I send a text message?



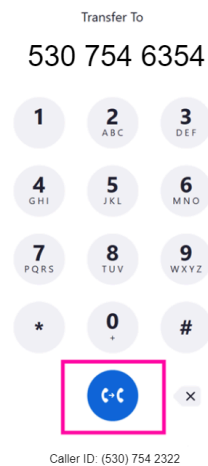
- Click “SMS” and then click the square and pencil icon. Start typing a name in the “To:” field.

5. How do I transfer or forward a call?

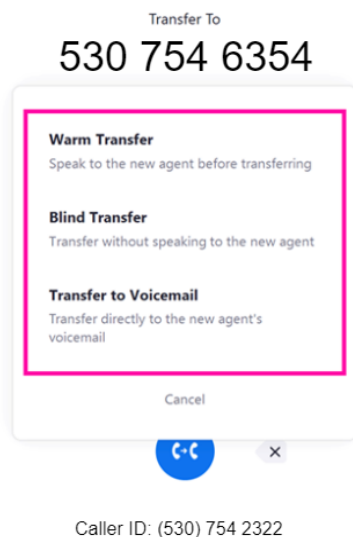
- Accept the Incoming Call.



- Click the Transfer icon:
- The caller will automatically be placed on Hold. Enter a Name or Phone Number to transfer the caller to.



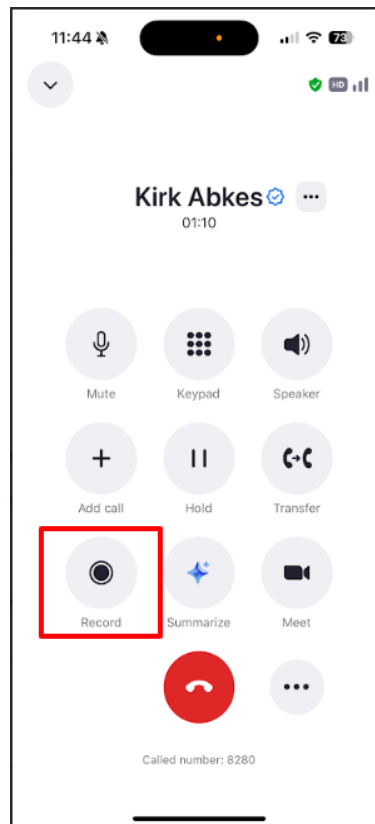
- Click the Transfer icon to transfer the caller.
- Select the desired Transfer option:



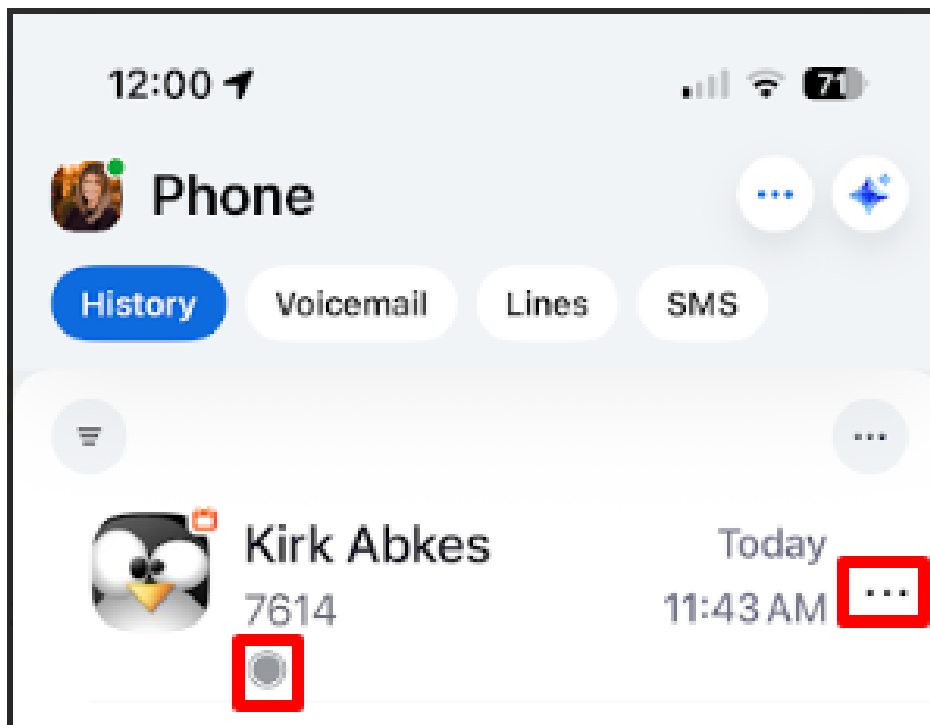
6. How do I set up my voicemail?

- To set up your Zoom voicemail, you'll need to access the Zoom web portal, not the mobile app.

7. How do I record a call?

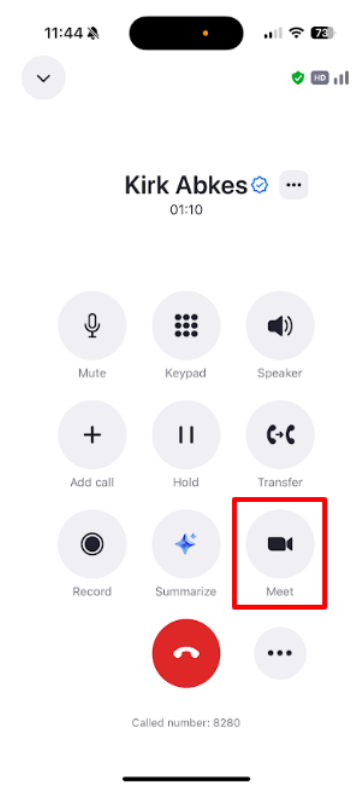


- Start the phone call and click the “Record” icon.
- Click “History” and click the ellipsis “...” to play the call recording



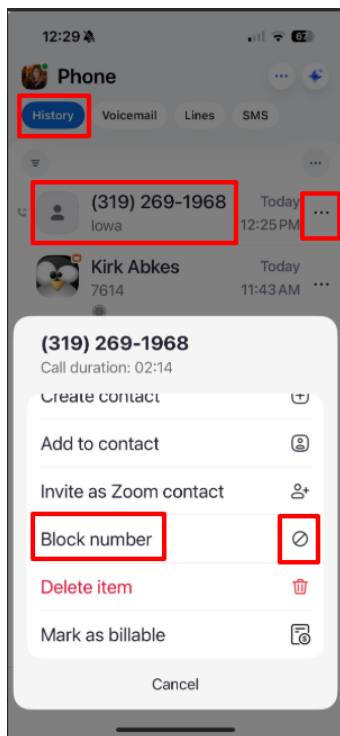
8. How do I switch a call to a Zoom meeting?

- Start the phone call and click the “Meet” icon.



9. How do I block a number?

- Click “History” and click the ellipsis “...”. Scroll down to “Block number.”



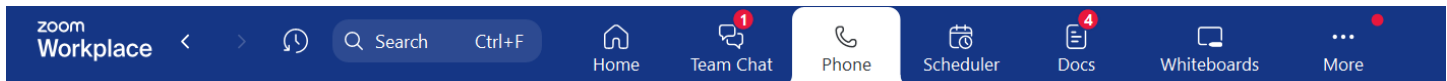


Advanced Features Tutorial

Advanced Features

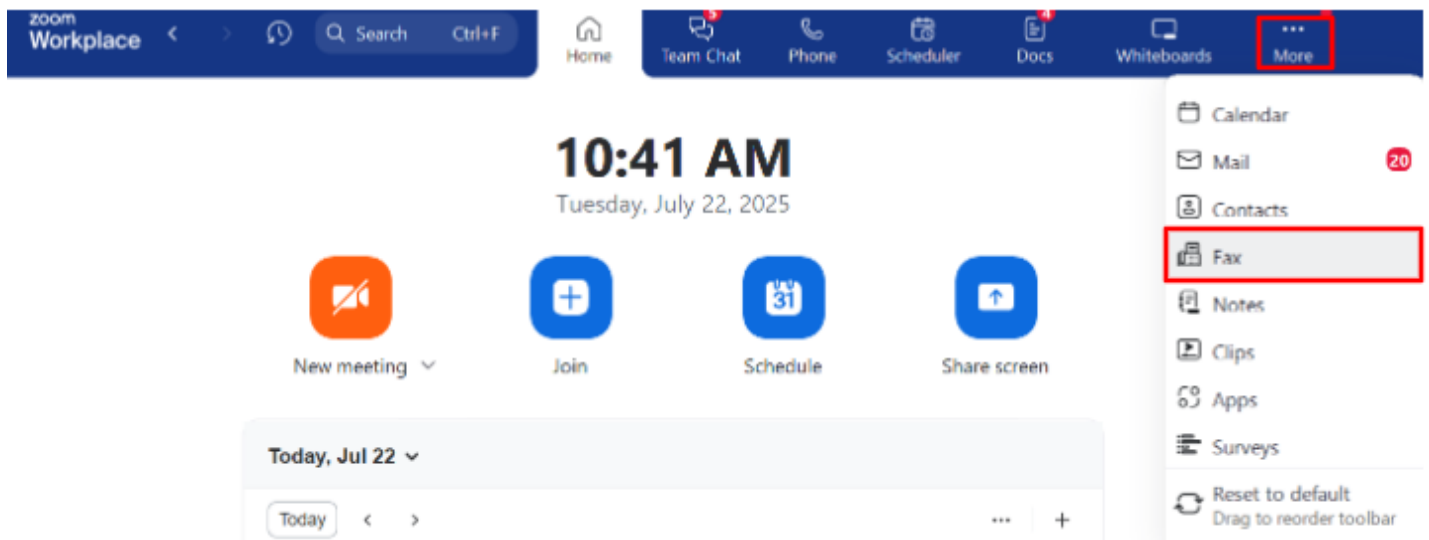
Advanced Features:

10. On the Desktop Client, the top bar of tabs is customizable; click and drag the icons to arrange them in the order of your choice.



11. How do I fax with Zoom?

- Open the Zoom desktop client and click the “More...” icon in the top toolbar.



- Click the blue “+” sign on the left side menu.



- Enter the required information and upload the files, then click “Send.”

Zoom Workplace ×

New fax

To
Select a contact or enter a fax number
0/50

From
(319) 273-8280

Fax cover
Select a cover page

Attachment
Click to upload or drop a file here
Only PDF format, up to 50 MB.

Or upload from: Google Drive One Drive Box Share Point

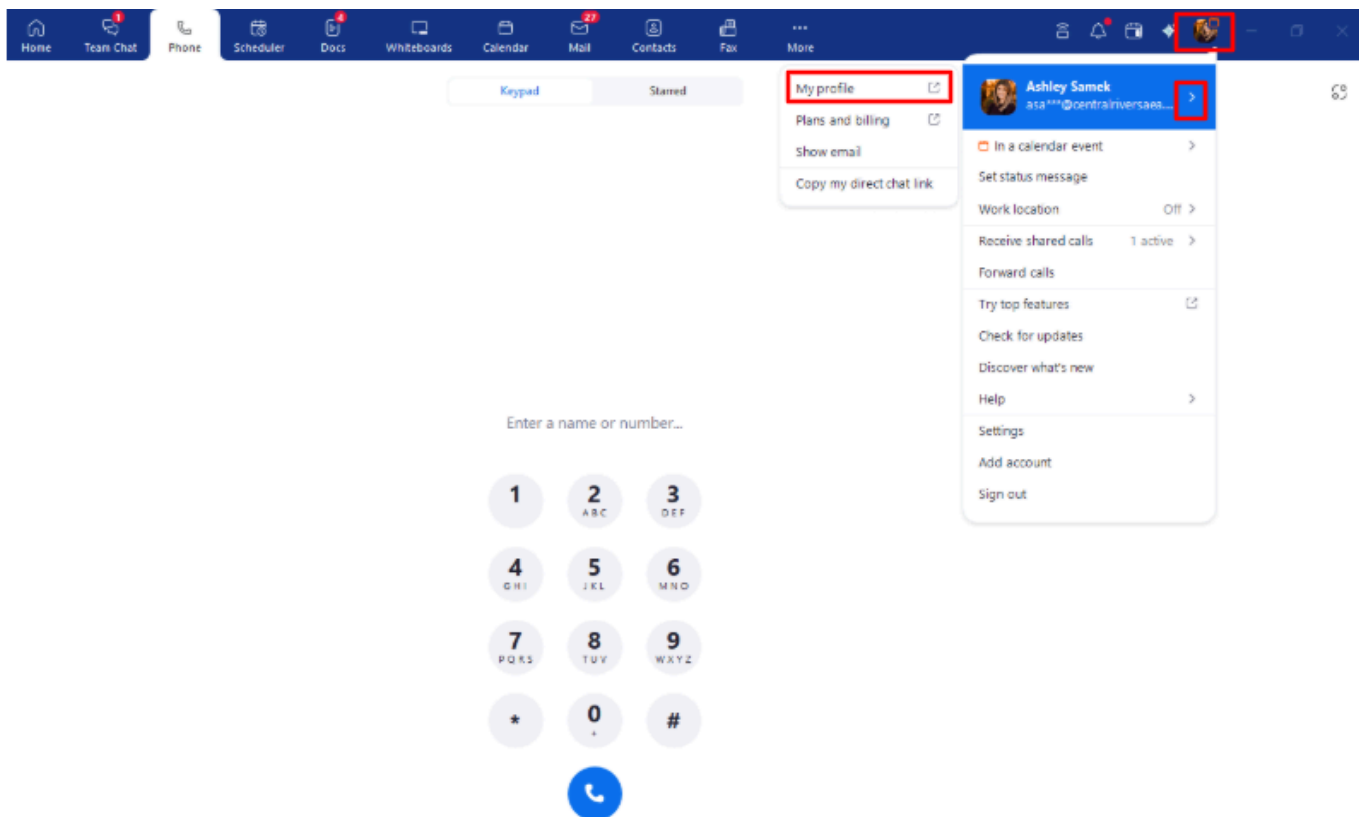
[Save as draft](#) [Send](#) [Cancel](#)

12. AI during a phone call

- Zoom's AI Companion offers several AI-powered features for Zoom Phone, including real-time call transcription, post-call summaries with action items, voicemail prioritization and task extraction, and SMS thread summaries.
- How to enable or disable Zoom AI Companion features
 - i. You can control AI Companion features in the Zoom web portal.. Individual users can also enable some AI features for their own use, if not locked by an admin at the account or group level.
 - ii. Sign in to the Zoom web portal.
 - iii. To enable or disable for your own use, click Settings.
 - iv. Click the AI Companion tab.
 - v. Click the toggle next to a feature to enable or disable it.

13. Call Handling

- Call handling refers to the customization of how incoming calls are routed based on specific time periods, such as business hours, closed hours, break hours, and holiday hours. Users can set preferences for where they want to receive calls, including on Zoom desktop and mobile apps, desk phones, or other devices. This customization allows for efficient call management, ensuring that calls are directed appropriately during different operational times.
- In the Zoom Client, click on your profile picture, hover over your name, and click on “My Profile.”



- Scroll down to “Phone” on the left-hand menu. Scroll down to “Call Handling” section on the right. Adjust the Call Handling settings as needed. Make changes to the Call Handling settings as appropriate.

PERSONAL

Profile

Meetings

Webinars

Events & Sessions

Phone

Personal Contacts

Personal Devices

Whiteboards

Notes

Docs

Surveys

Recordings & Transcripts

Summaries

Clips

Scheduler

Settings

Data & Privacy

> Analytics & Reports

ADMIN

Area Code ⓘ

319 [Edit](#)

Call Handling

Business Hours

Mon
6:30 AM ~ 4:00 PM

Tue
6:30 AM ~ 4:00 PM

Wed
6:30 AM ~ 4:00 PM

Thu
6:30 AM ~ 4:00 PM

[Edit](#)

Call Handling [Edit](#)

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

Call Handling Ring Mode

Simultaneous ▾

Max Wait Time

15 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

Greeting & Leave voicemail instruction

🔊 IT Special Program Coordinator VM Greeting [Edit](#) ▾

Videomail greeting can be recorded at Zoom client.

Closed Hours

Call Handling [Edit](#)

You have not enabled any items for Call Handling.



Video Tutorials



Video Tutorials

Zoom Phone Topic	Video Link
SETUP	
Initial user settings on the web portal	Initial Zoom Phone Setup
User settings for call handling	Call Handling
USING ZOOM PHONE IN THE APP	
Using the desktop client	Zoom Phone From the Desktop Application
Using the mobile app	Zoom Phone From the Mobile App
Adjusting audio settings	Test Your Audio Settings
In-call options (desktop client)	In-Call Options in the Desktop Application
In-call options (mobile app)	In-Call Options in the Mobile Application
ADDITIONAL FEATURES	
Using Zoom Phone Assistant/Power Pack	Customize Zoom Assistant with Power Pack

? FAQ

FAQ

Frequently Asked Questions

14. I'm having issues with Zoom Phone connectivity. I use it when I'm driving from place to place, and it is pretty spotty, cutting in and out a lot. I have noticed it's better when I'm on my desktop.

- The issues with spotty calls while driving are likely due to the nature of cellular coverage and how Zoom Phone leverages that. When you're driving, you're constantly moving between different cell towers, and signal strengths can fluctuate significantly, leading to call dropouts or poor audio quality. Unlike a traditional cell call, which might hand off more seamlessly, Zoom Phone relies on a consistent data connection, and if that connection is interrupted, the call quality will suffer. This is also why you notice it's better on your desktop, as that connection is typically more stable.

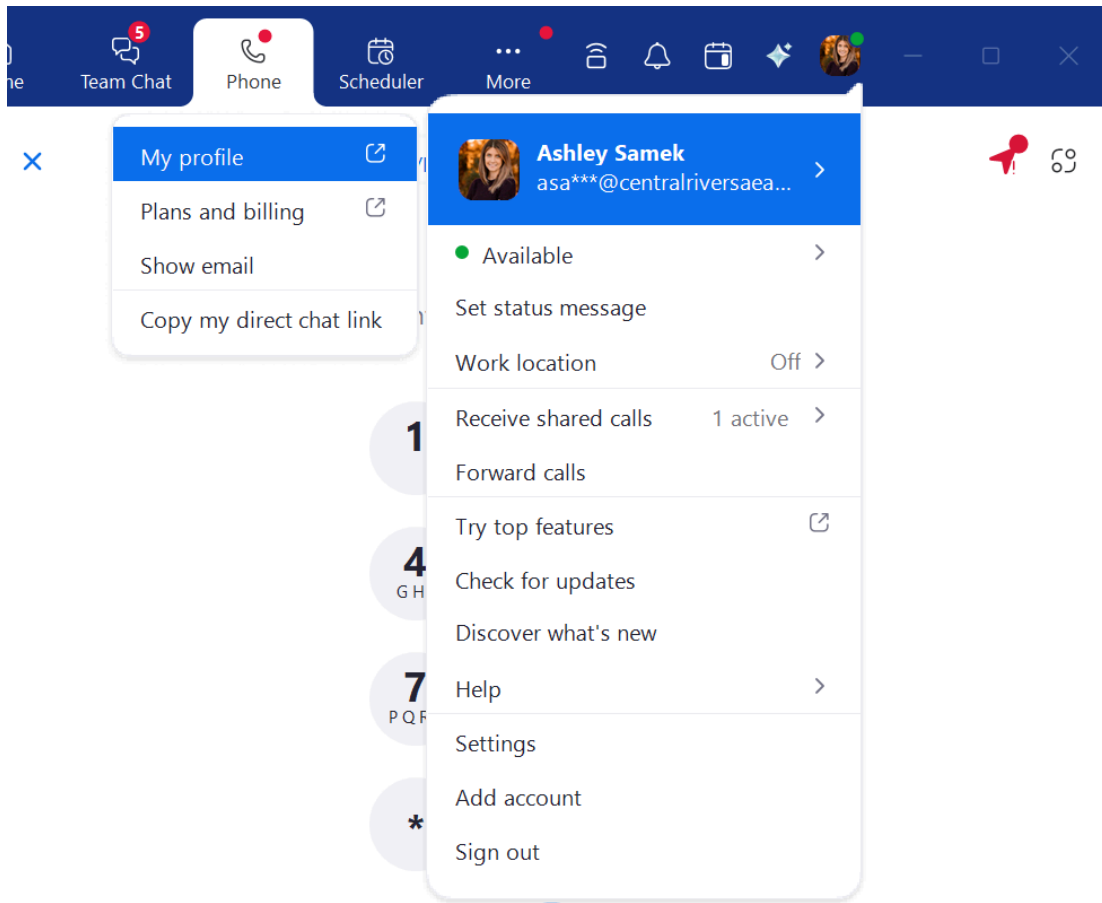
15. Also, there are times when the texts or missed calls don't pop up and alert me.

- **Zoom App Notification Settings:**** Open the Zoom app on your cell phone, go to "Settings," then "Notifications." Make sure that "In-App Notifications" are enabled for "Missed Calls" and "Chat Messages." You might also want to check other notification options there.
- **Phone System Notification Settings:**** On your cell phone, go to your phone's main "Settings" app, find "Apps" or "Applications," then locate "Zoom." Within Zoom's app settings, ensure that notifications are fully enabled and that notification categories like "Missed Calls" and "Messages" are allowed to display alerts (e.g., banner notifications, sound, vibration). Sometimes, specific notification categories can be turned off even if general app notifications are on.

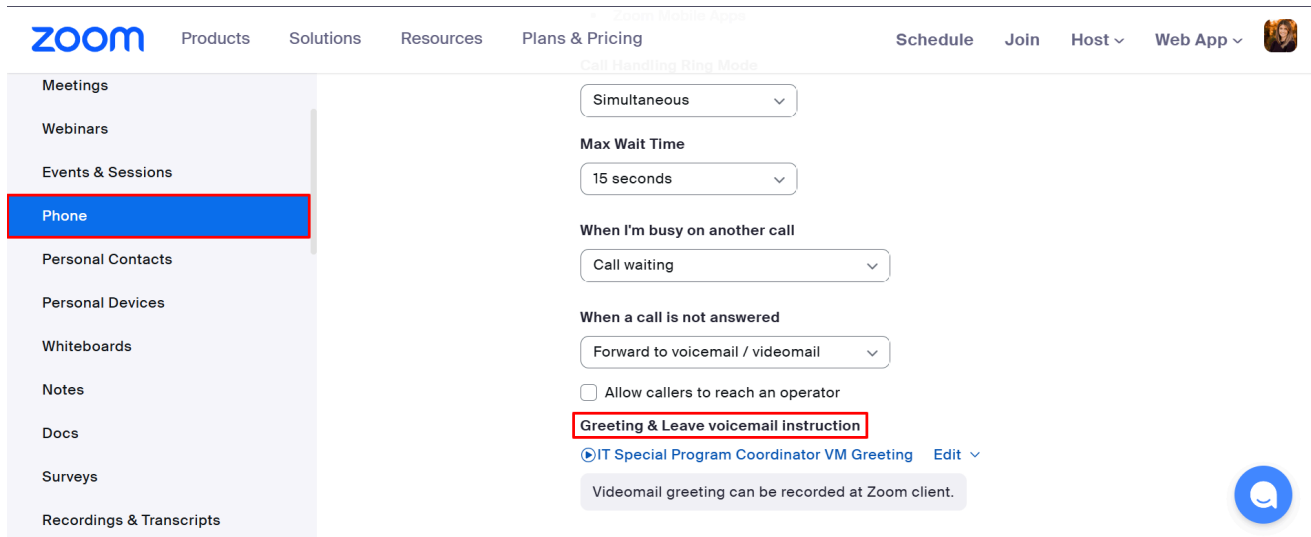
16. How do I change my voicemail greeting for out-of-office holiday break?

- Voicemail is set up in the Zoom Web Portal. To get to it quickly from the Desktop Client, click on your profile picture in the upper right-hand corner, click on your name, click on "My profile," and

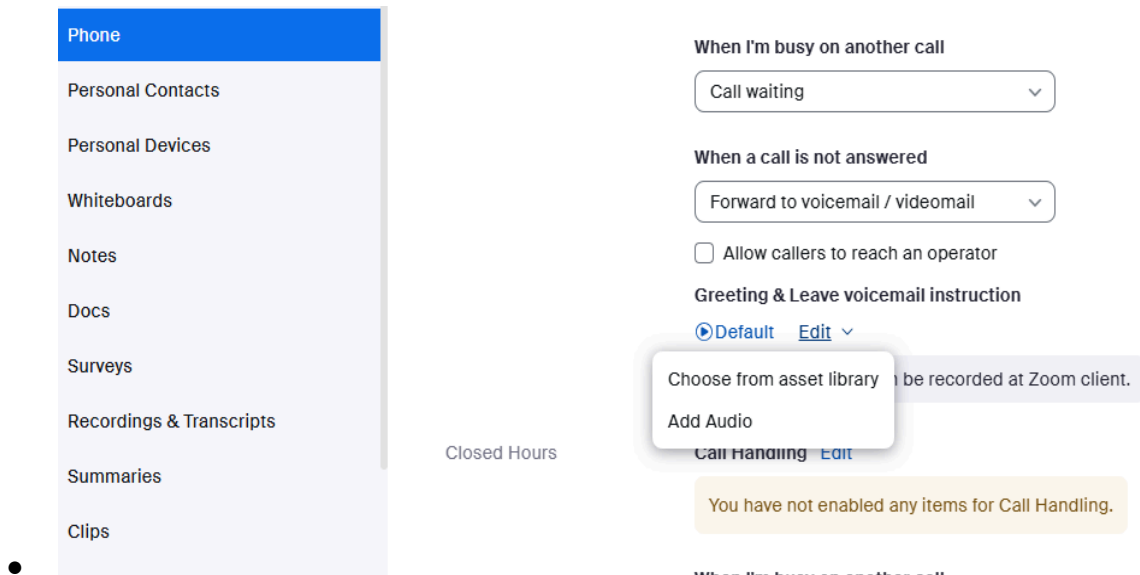
log in if needed.



- Scroll down on the left-hand side menu to “Phone” and scroll down on the right-hand side to the “Call Handling” section.
- Scroll down to the “Greeting & Leave voicemail instruction” section. Click “Edit” to add your audio.



- Choose the “Add audio” option.



- Select “Record by Computer” to record a new voicemail, title your voicemail field in the “Asset Name”, and select “Voicemail greeting” from the “Category” dropdown menu. Finally, you can click the red recording circle to begin recording your voicemail.

Add Audio

Text to Speech Upload **Record by Computer**

Asset Name

My Voicemail

Category

Voicemail greeting x

Language

American English

Record Audio

Click the record button to start recording



00:00 / 04:00

Visibility

☒ Personal Audios ☐ Asset Library (Public)

By uploading, using, or displaying copyrighted music, audiovisual content, sound recordings, photographs, artwork, and other forms of media on the Zoom platform you warrant to Zoom that you have permission and/or a license to use such content. Doing so without permission or license from the owner violates Copyright Law and may result in the removal of such content by Zoom and subject you to Zoom's repeat infringer policy.

Add

Cancel

-
- Once your voicemail has been recorded, click the blue “Add” button to finalize your voicemail.

17. Why is my caller ID name for my Zoom Phone number not displaying correctly for the receiving party?

- The reliability of caller ID name delivery varies depending on the country and the outgoing and receiving phone services that handle the call.
- In the US, it's up to the receiving phone service or carrier to match your caller ID number using a caller ID name database. These databases cost money so some phone services may not have a caller ID name database with updated information. As a result, the receiving party may see an outdated caller ID name.
- If you're calling a mobile number, it is still up to the receiving party's carrier to support caller ID name. If the carrier doesn't support caller ID name, the receiving party will only see your caller ID number.
 - i. Here are some other limitations of caller ID name:
 1. Does not display if you select a toll-free number as your **outbound caller ID** (only the caller ID number will display)
 2. Has a maximum of 15 characters including spaces

3. Displays with all uppercase letters regardless of how you specify it in Zoom Phone
4. Cannot contain any special characters
5. The receiving party may also be using a third-party caller ID or dialer app that's displaying a different caller ID name than you've set in Zoom. Contact the third-party service for more information.

18. How many devices can be signed into Zoom simultaneously?

- You can be signed in to Zoom on one computer, one tablet, and one phone at a time. If you sign into an additional device while logged into another device of the same type, you will be logged out automatically on the first device.

19. I'm experiencing a weak signal?

- Zoom Phone works through a data connection, either Wi-Fi or cellular data, but if you're experiencing a weak signal, you can switch the call to your phone carrier by pressing the *More* button from the Zoom call controls. Zoom phone will then ring your own cell phone and pass the call through so you can continue your call, all without exposing your personal cell phone number.

20. Do I have to have Zoom running in the background to receive phone calls? Yes, the Zoom app must be running in the background (minimized) on your computer to receive calls.

Auto Launch Zoom App on startup - Windows:

- Sign in to the Zoom Desktop Client.
- Click your profile picture, then click Settings.
- Click General.
- Click the *Start Zoom when I start Windows* checkbox.

Auto Launch Zoom App on startup - Mac:

- Ensure that the Zoom meetings app is running.
- Go to your desktop. Hold down the Control key and click the Zoom icon in the Doc.
- Hover over Options and select Open at Login which will place a checkmark by that option.

21. Where can I find an update for the Zoom Desktop Client? To update the Zoom Desktop Client, click your profile picture and select "Check for updates."

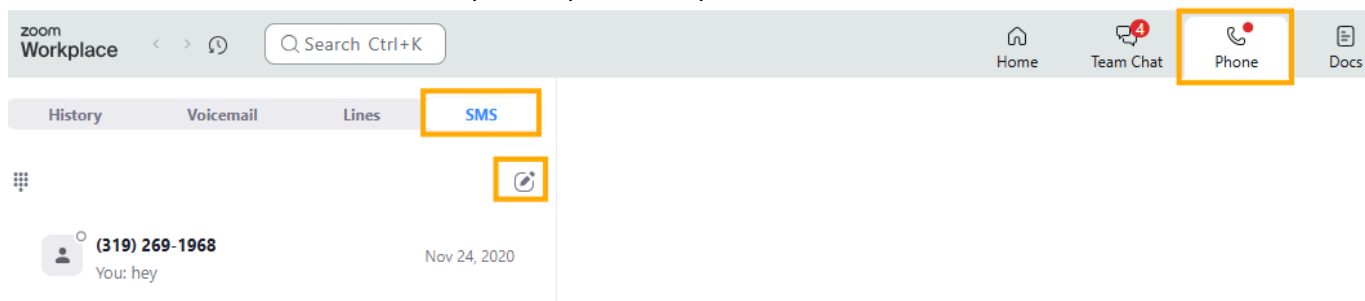
Channel Article

Send Text Message

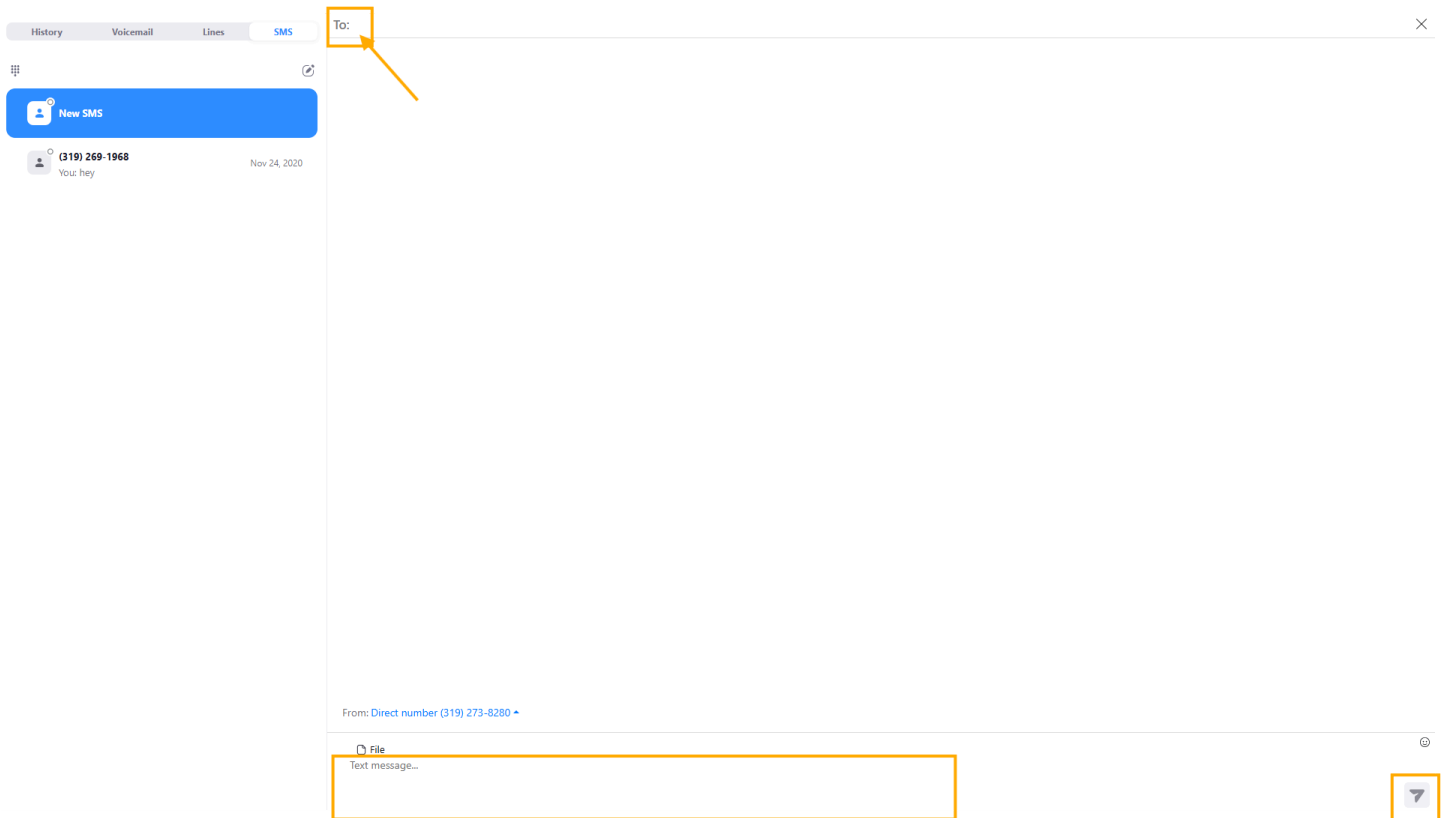
Channel Article: How to Send Text Message

1. How do I send a text message through Zoom Phone Desktop?

- Open the Zoom desktop client and click the “Phone” icon in the top toolbar.
- Click the SMS tab and click the compose square and pencil icon .

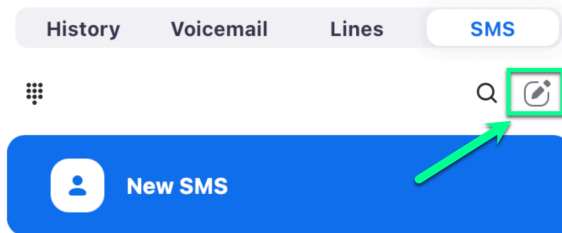


- In the To field, enter a contact's name or a phone number. You can add up to 10 recipients.
- Type your message in the text box. Press the Enter key on your keyboard to send the message.



2. How do I send a text message from the Mobile App?

- Open the App Store on your Mobile device.
- Click the “Phone” icon in the bottom toolbar
- Click SMS tab and then click the square and pencil icon  to compose. Start typing a name or phone number in the To: field, type a message in the Text box, and click send. 



Zoom Scheduler "Booking Link"



CENTRAL RIVERS
AREA EDUCATION AGENCY

Channel Article: Zoom Scheduler “Booking Link”



Tutorial

1. How do I create a booking schedule?  [Video Tutorial](#)
 - Access Zoom Scheduler via the Zoom Desktop Client.

zoom
Workplace

Search Ctrl+F

Team Chat Phone Scheduler Docs

Scheduler

Booking pages

- Scheduled events
- Routing forms
- Generated links
- Notification settings
- Analytics
- Integrations

ADMIN

- Managed schedules
- Groups
- Teams

Booking pages

My scheduler

Welcome

This is your homepage, where you will be able to manage and/or host. [Learn More](#)

Ashley Samek (You)

<https://centralriversaea.zoom.us/zbook/ashley-samek>

All booking pages (1)

30 minute Meeting with Ashley Samek

30 mins, One to one

"This section is for notes!"

Share

Welcome to Zoom Scheduler 🙌

Scheduling made easy with our new availability and booking platform

Connect your calendar Set your availability

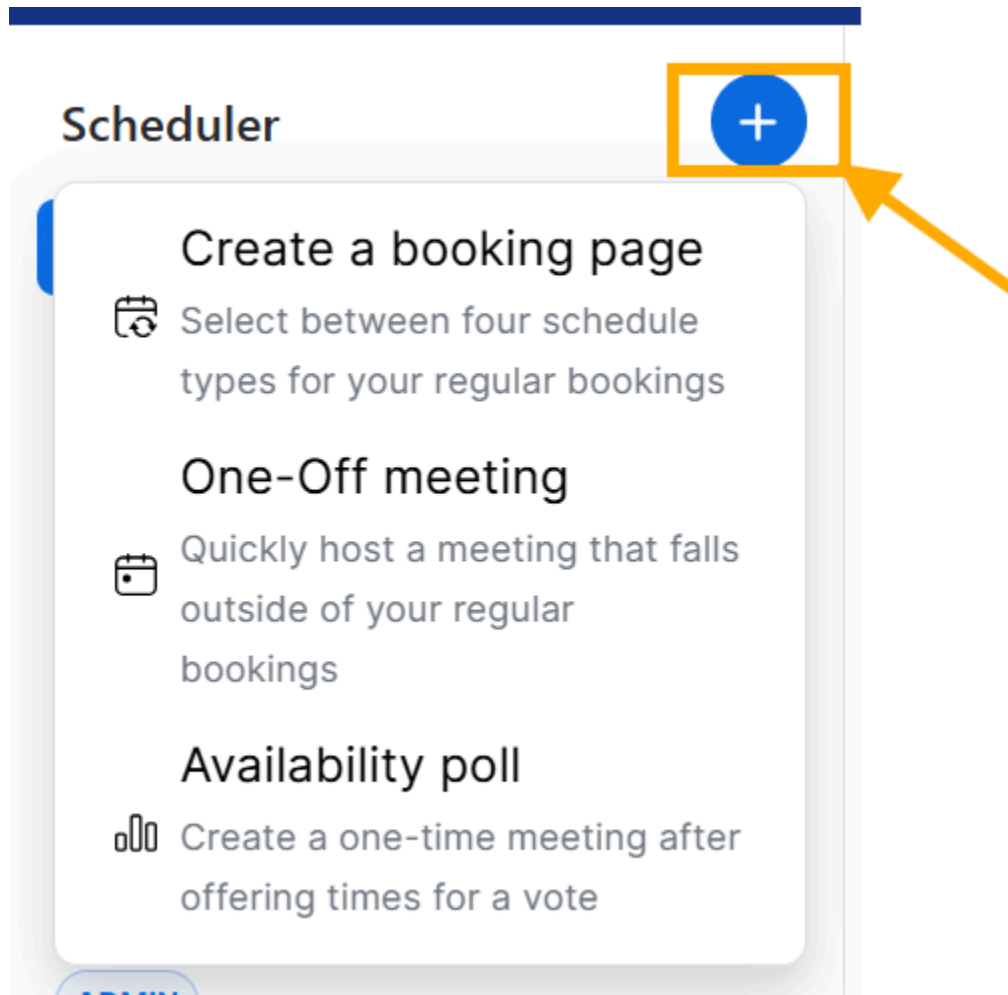
We'll use your connected calendar to let Zoom Scheduler know when you're available and create calendar events as they are scheduled.

Google Calendar	Connect
Outlook Calendar	Connect
iCloud Calendar BETA	Connect

[Do this later](#)

- Click the blue **+** **Create schedules**.

A pop-up window will appear.



- In the window, select the type of schedule that you want to create:

Note: Only repeating availabilities appear on your public page.

- i. **Create a schedule:** Select between 4 schedule types for your regular bookings:
 1. **One to One:** Schedule a meeting with one attendee and you as the host. The attendee can add other guests when booking if the host allows. Learn more about [creating the One to One booking schedule](#).
 2. **One to Many:** Schedule a meeting with multiple attendees and you as the host. The full attendee list will not be visible on the calendar invite. Learn more about [creating the One to Many booking schedule](#).
 3. **Any Host Available:** Schedule meetings with multiple team members in a rotating cycle, accommodating one attendee per booking. Learn more about [creating the Any Host Available \(rotating host\) booking schedule](#).
 4. **All Hosts Available:** Schedule meetings with multiple hosts, accommodating one attendee per booking. Learn more about [creating the All Hosts Available \(collective host\) bookable schedule](#).
- ii. **One-Off meeting:** Host a meeting that falls outside your regular booking schedule. Learn more about [one-off meetings](#).

- iii. **Availability poll:** Create a one-time meeting after offering times for a vote. Learn more about [availability polls](#).
- After completing the schedule creation setup, click **Finish** to save this schedule. When created, you will be provided with the link to this booking calendar, so that it can be [shared with others](#).



Your schedule is now live



Connect with Ashley

 One to one  30 mins  Zoom Meeting

Share your booking link

<https://centralriversaea.zoom.us/zbook/ashley-samek/connect-wi>

Customize

- i. (Optional) Under the booking link, select the **Generate single-use link** checkbox.
When selected, this single-use link will expire after an attendee books an event using this link. Unused links will appear as **Pending** in your **Scheduled Events** tab.
- The booking link can be added to an email and email signature or you could make it a QR code with [QR Generator](#) for presentations.

Google Calendar Tip: To ensure a meeting can be booked, your Google Calendar must not show you as "Busy." If a calendar event is labeled "Free" a meeting can still be scheduled at that time.

For instance, if your Google Calendar shows "Virtual Services" or "Cedar Falls Office" events scheduled for an entire day, update that to "free" to allow meetings to be booked during those times.

Virtual Service

Save

More actions ▾

Oct 20, 2025

8:00am to 4:45pm

Oct 20, 2025

(GMT-05:00) Central Time - Chicago

Time zone

☐ All day

Weekly on Monday ▾

Event details

Find a time

☐ Add video conferencing ▾

☒ Make it a Zoom Meeting ⚙

Add location

Notification ▾ 10 minutes ▾ ×

Add notification

Ashley Samek ▾

Add a Zoom Attachment ⓘ

Free ▾ Default visibility ▾ ⓘ

Create meeting n...

Add description

Guests

Add guests

🔗 Suggested times

Guest permissions

☐ Modify event

☒ Invite others

☒ See guest list