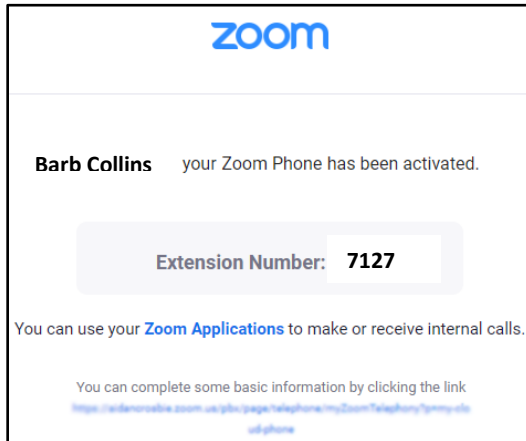


Getting Started With Zoom Phone

Initial Setup:

1. When your Zoom Phone administrator assigns you a Zoom Phone license, you will receive an email notification with a link to set up your Zoom Phone. Select the “link” located at the bottom of the email notification.



2. If you didn't receive an email, sign into the [Zoom web portal](#) using your [first name] [period] [last name] and computer password, then select “Phone”.

Enter the required information listed below to finish setting up your Zoom Phone:

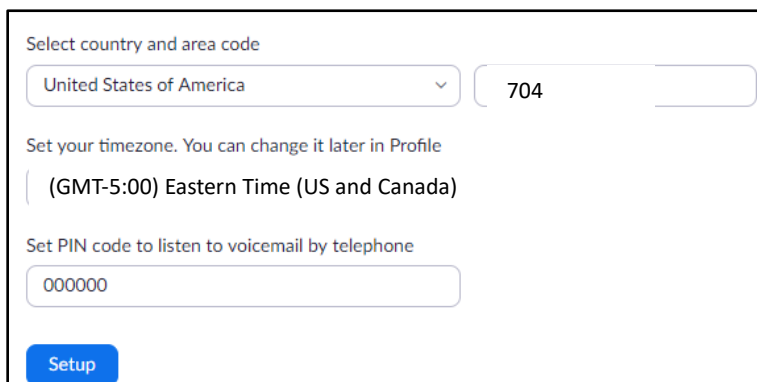
Country and area code: The area code is used when you dial local numbers.

Time zone: It is important to make sure you set the correct time zone. It will affect several Zoom Phone features including your business/closed/holiday hours and desk phones assigned to you by your administrator.

PIN: A pin number is used to check your voicemail on a desk phone. If you are assigned a desk phone than you will need to enter a voicemail pin number. Select “Show or Edit” to change this number, then select the “Save” button.

Note: *You will not need the PIN number to check voicemail using the Zoom Phone desktop application, mobile app, or web portal.*

3. Select the blue “Setup” button.

A screenshot of the Zoom Phone setup form. It has three sections. The first section is "Select country and area code" with a dropdown menu showing "United States of America" and a text input field containing "704". The second section is "Set your timezone. You can change it later in Profile" with a dropdown menu showing "(GMT-5:00) Eastern Time (US and Canada)". The third section is "Set PIN code to listen to voicemail by telephone" with a text input field containing "000000". At the bottom left is a blue "Setup" button.

Phone Settings:

To review or adjust the Zoom Phone settings, sign into the [Zoom web portal](#). Select “Phone”, then select the “Settings” tab.

Setting options:


Site: Displays the campus (site) you belong to (if your admin enabled multiple campuses for your organization).

Package: Displays the calling plan that determines restrictions on your outbound calls.

Number(s): Displays the direct phone numbers that have been assigned to you.

Emergency Address: To change the emergency address associated with the phone number, select “Edit”. Select an “address” from the drop-down menu, then select the “Save” button.


Note: *The emergency address displays the address provided to first responders when dialing an emergency number. It is very important to make sure this address is the correct address.*

History	Voicemail	Recording	Settings
Site	North Campus (Main Site)		
Package	US/CA Unlimited Calling Plan		
Number(s)	(980) 203-2372 (United States)		
Extension Number	7127		
Emergency Address 	Default: 1333 Jake Alexander Blvd S, Salisbury, North Carolina 28146, United States (Company Address) Edit		
	Personal Emergency Address		

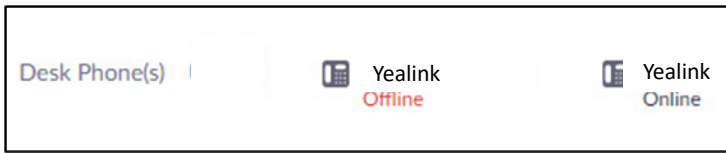
Outbound Caller ID: Select the “default caller ID” when using the Zoom Phone desktop application to make outbound calls. You can select between the main Rowan-Cabarrus phone number and any direct phone numbers that have been added by your Zoom Phone administrator.

Note: *You will still be able to change the outbound caller ID before making a call in the Zoom Phone desktop application.*

Area Code (optional): Select “Edit” to change the area code that is used for local calls.

Outbound Caller ID	<input type="text" value="Barb Collins - (980) 203-2372 (United States)"/>
Country/Region	<input type="text" value="United States (+1)"/>
Area Code 	704 Edit

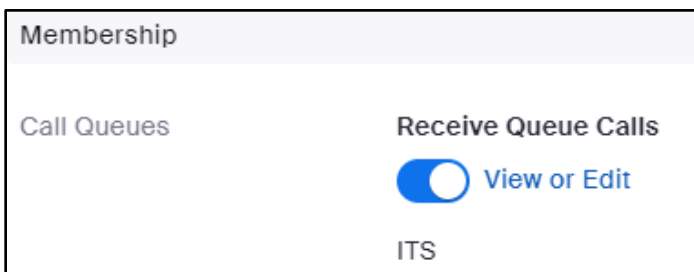
Desk Phone(s): Displays any desktop devices that have been added to your account. Phones that display with an Online status are turned on and provided by your Zoom Phone administrator.



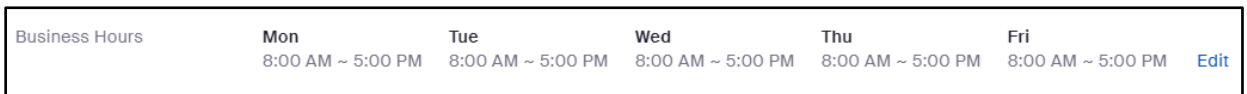
Membership: Displays call queues that you have been added to. You will also see (Manager) if you've been assigned as the call queue manager.

Note: Calls to call queues that exceed a maximum wait time that is set by your Zoom Phone administrator will route to the call queue manager by default.

Receive Queue Calls: Select the button to enable or disable all calls from call queues you have been added to.



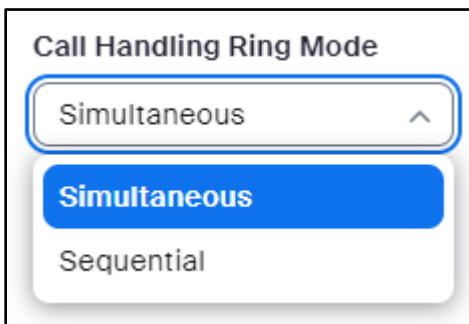
Business Hours: Select "Edit" to change the times for when you can answer calls. Inbound calls outside of normal business hours will immediately be forwarded to your voicemail.



Ring Mode: Select a "option" from the drop-down menu to determine how your calls are distributed during normal business hours.

Select "Simultaneously" if you wish to ring the Zoom Phone desktop application and specified devices at the same time.

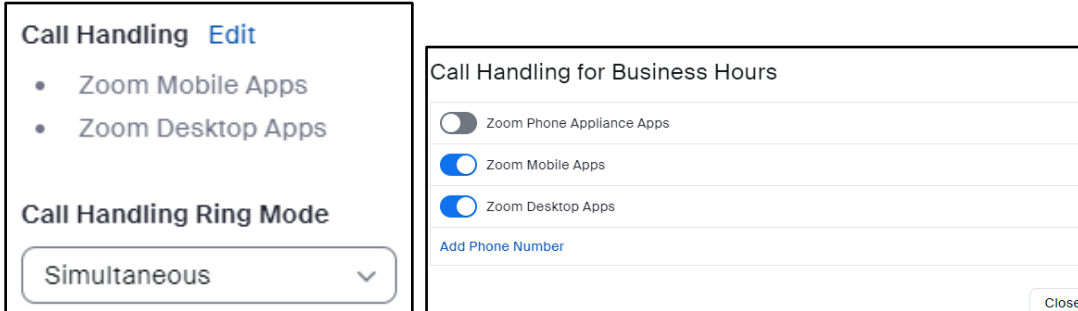
Select "Sequentially" to ring the Zoom Phone desktop application and other devices one at a time.



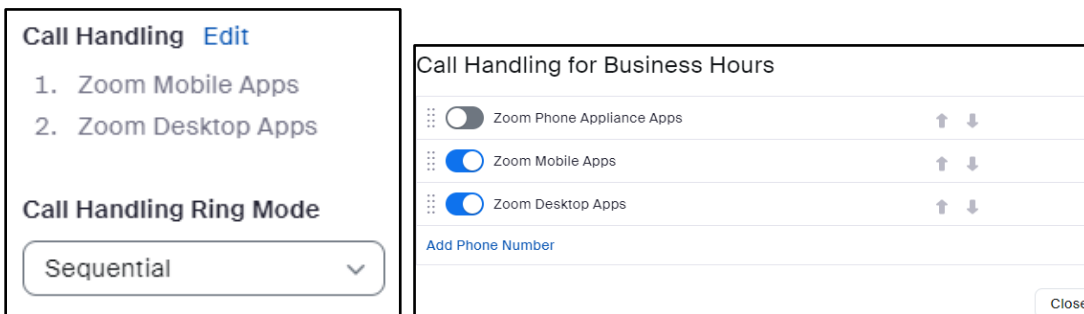
Note: After selecting a method, make sure you choose a Call Handling & Call Forwarding option to specify the routes.

Call Handling: Select “Edit” to specify how calls are being routed during normal business hours. If the Ring Mode is set to “Simultaneously,” select the “buttons” next to each option to enable or disable them. Select “Add Phone Number” to add a custom phone number. You can add your personal phone number here if you like.

Note: Follow these instructions to set up how your calls are routed during closing hours.

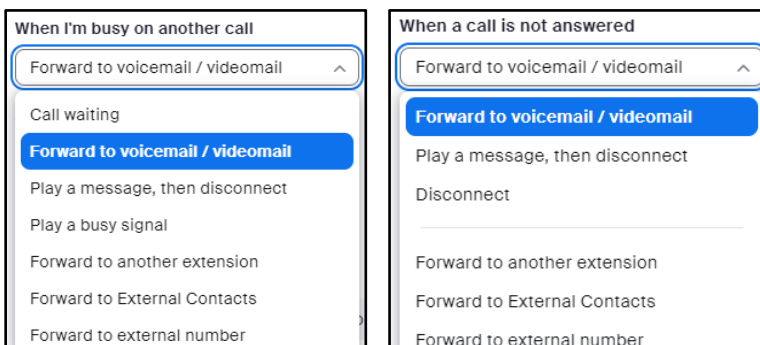


If the Ring Mode is set to “Sequentially,” select the “arrow” icons or select and drag to rearrange them in order. Select “Add Phone Number” to add a custom phone number. You can add your personal phone number here if you like.

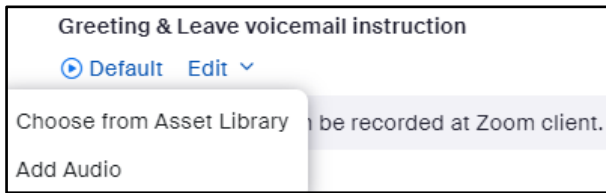


Call Forwarding: Set your call forwarding preference by choosing an option from each drop-down menu to forward your calls to when you are busy on another call and when a call is not answered.

Note: Follow these instructions to set up your call forwarding preference for closing hours.



Greeting and Leave Voicemail Instruction: Select “Edit” from the drop-down menu to customize and record a voicemail greeting or upload a supported audio file.

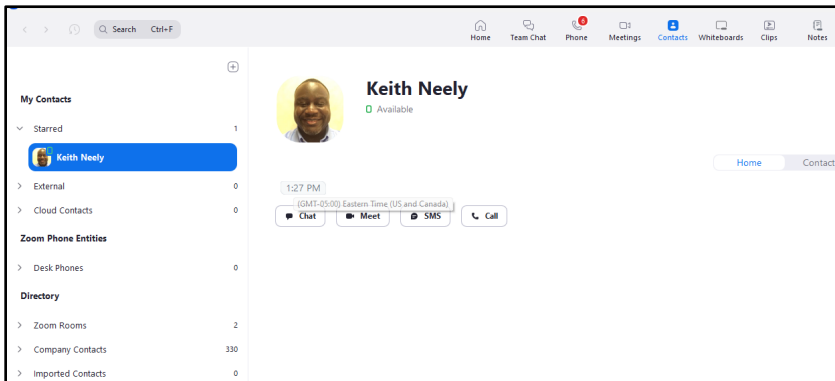


Select “Record by Computer” to record an outgoing voicemail message or if you already have a recorded voicemail message, select “Upload”, then select your file. Select the “Add” button. A voicemail greeting can be set up to play during business hours and closing hours.

Delegation and Assistant: Allows you to assign other users to answer or make calls on your behalf. Select “Set”, then search for user. Once the user is located, select their “name”, then select the “Invite” button. This will assign this user to answer and make calls on your behalf during normal business hours. If another user has assigned you to answer their calls, you will see their name and extension listed below I can assist for.

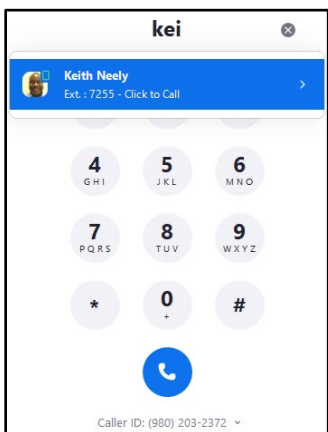
Contacts:

You can use the contacts that are listed in the Zoom Phone desktop application or mobile app to call people from Rowan-Cabarrus. You can also sync contacts from third-party services such as Microsoft 365 and google.

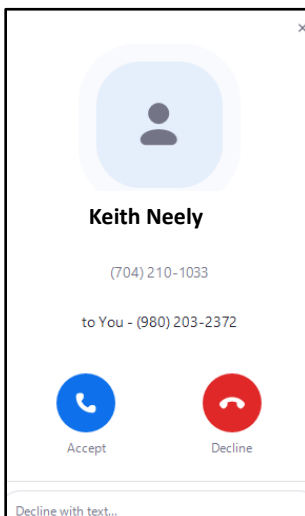


Make and Receive Phone calls:

1. After the initial setup, you can start making and receiving phone calls using Zoom Phone. To make a call use the dial pad or enter a name or number.

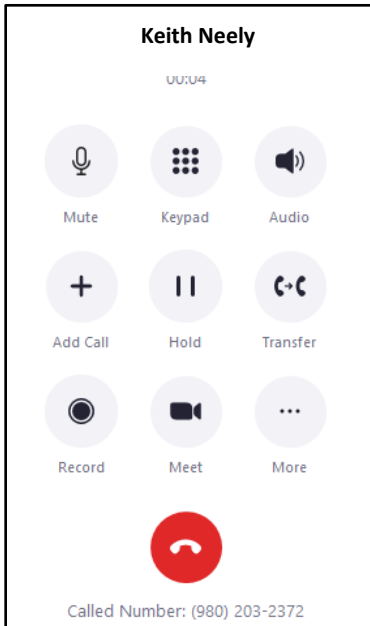


2. For incoming phone calls, you can select "Accept" to answer it or "Decline" to route it directly to your voicemail. You can also decline it and send them a text.



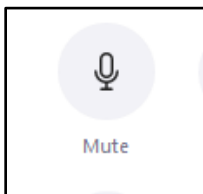
In-call Controls:

While in a call, you can view the contact person's name or number, mute, put call on hold, transfer, and add another caller.



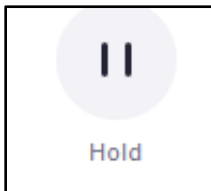
Mute:

Select the "Mute" icon to mute yourself and unselect to unmute.



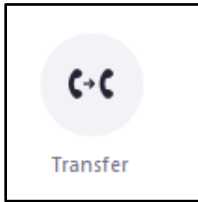
Hold:

Select the "Hold" icon to put the caller on hold and select it again to resume the call. The caller will hear the music while on hold. The hold music can be customized in Settings located in the Zoom web portal.

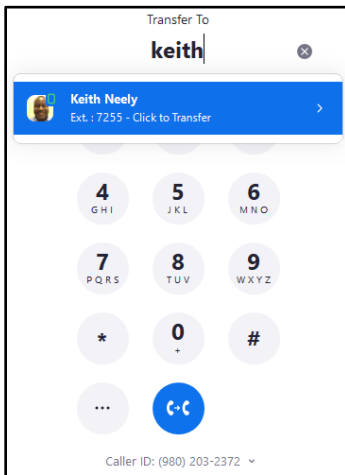


Transfer:

Select the “Transfer” icon.



Enter a contact name or number to transfer the call to, then select the “Transfer” icon at the bottom of the dial pad.



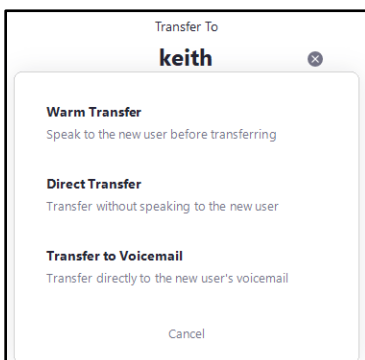
Warm Transfer: The current call will be placed on hold while you connect to the person before transferring the call.

Direct Transfer: The current call will be transferred without speaking to the person first.

Transfer to Voicemail: The current call is directly routed to person’s voicemail.

Once a selection is made, select the “Complete Transfer” to transfer the call and hang up your phone.

Note: Select “Cancel” if you want to cancel the transfer and return to the original call.



Add a Call:

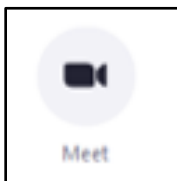
Open the dial pad and enter the number for the person you wish to add to the call. Each person will remain on a separate line until you select the “merge” icon, then select the “person or number” to merge with.

***Note:** If one of the other call participants leaves the call, the call will continue for the remaining 2 users.*

Elevate your Zoom Phone Call to a Zoom Meeting:

Select or tap the “Meet” icon on the dial pad. The other caller participant will automatically join the meeting.

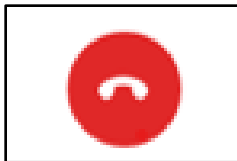
The other caller participant will bypass the waiting room if it is enabled for everyone, and the bypass option is enabled as well. If you add another caller to the call after you elevate the call to a Zoom meeting, the meeting will only start with the active caller. You need to merge the two calls first.



***Note:** The default setting for the waiting room is disabled by default. This setting can be enabled by using the security option located in your meeting controls.*

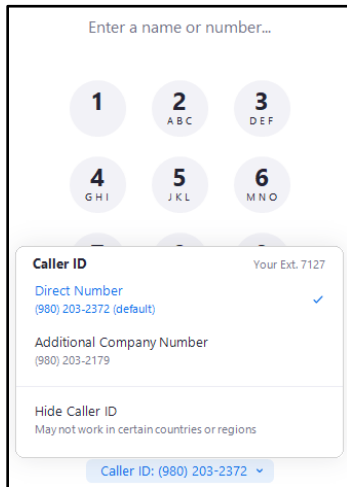
End the call:

Select the red “End call” button to end the call. Once you end the call, your status in Zoom Phone will no longer show you as on a call and the call timer is no longer displayed.



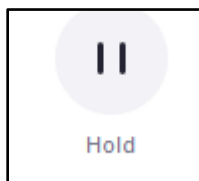
Change the Number you are Calling from:

Select the “drop-down” menu next to Caller ID to change the outbound caller ID number. While you are in a call, you’re in-call status is synced to the desk phone that has been assigned to you.

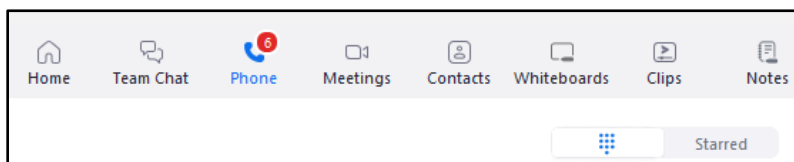


Call Flip:

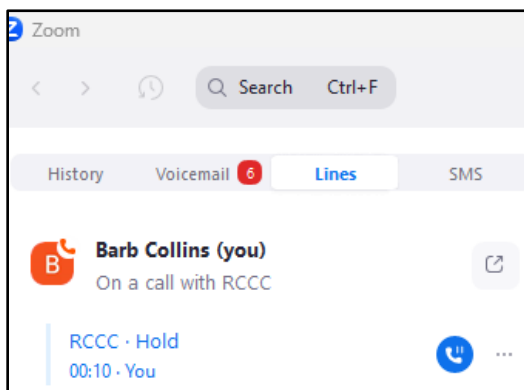
1. Select the “Hold” icon to place the call on hold.



2. Select the “Phone” tab in the Zoom Phone desktop application or mobile app.

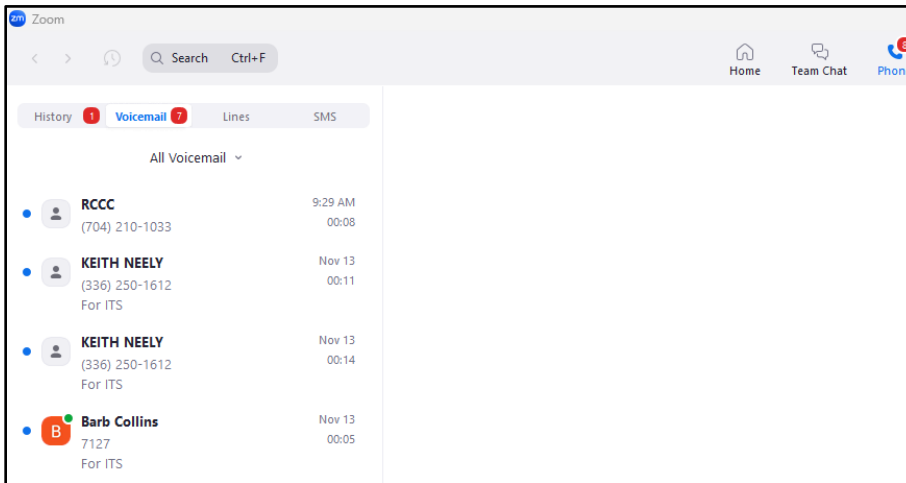


3. Select the “Lines” tab in the Zoom Phone desktop application or mobile app to see the call you placed on hold, then select the “Hold” icon to answer the call.



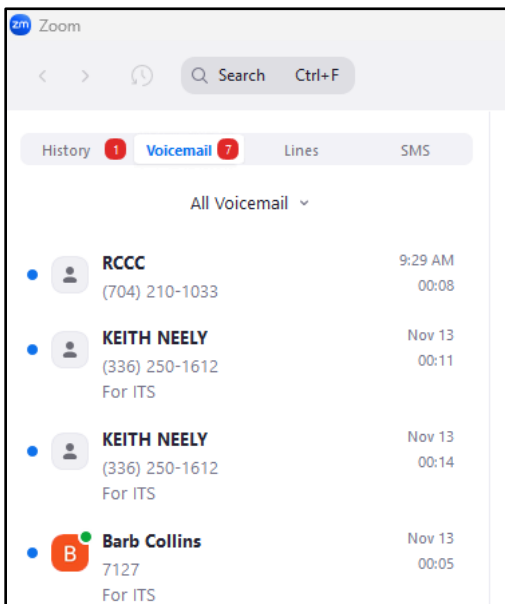
Listen to Voicemail:

1. Zoom Phones will automatically route your unanswered and declined inbound phone calls to your voicemail. Select the “Phone” tab in the Zoom Phone desktop application, then select the “Voicemail” tab. Notice voicemail messages will display with the most recent messages located at the top.

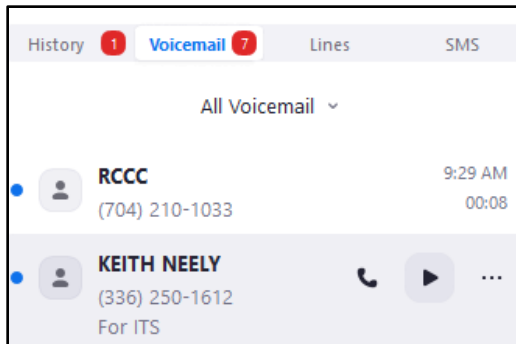


2. You will see a name next to a number if it belongs to an internal or synced contact or if the number has a caller id name. Voicemail messages that have a blue dot next to them have not been played yet.

Note: If you have access to a shared voicemail inbox, you will see the name of the phone user, call ACD queue, or auto receptionist below the caller ID.



3. Hover over a voicemail message with your computer mouse, then select the “play” icon to listen to the message. Select the “phone” icon to call the person back that left you a voicemail.



4. Select the “three dots” next to a voicemail message to display additional options that are available to you.

Send Text Message: Allows you to send an SMS message to a number (If enabled).

Copy Number: Allows you to copy a number to your systems clipboard.

Create Contact: Allows you to create a contact for Google or Outlook using the call history entry.

Add to Contact: Allows you to add a contact to your personal contacts.

Mark as Read: Allows you to mark a voicemail as read after listening to it.

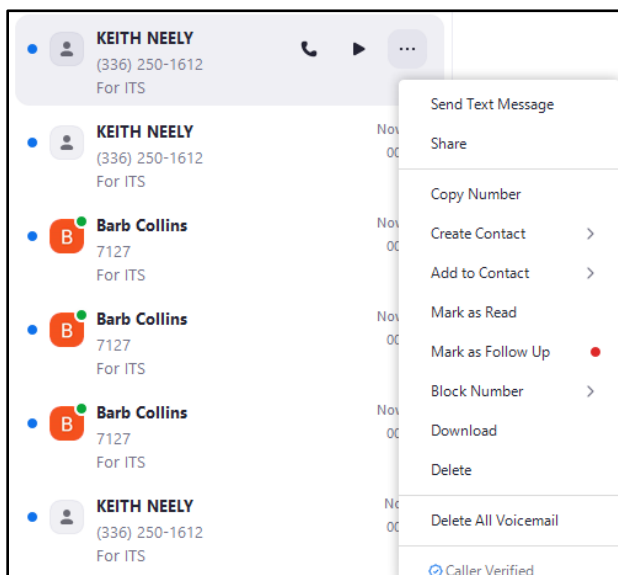
Mark as Follow Up: Allows you to follow up with the person that left the voicemail.

Block Number: Allows you to add the phone number to your blocked list.

Download: Allows you to download or save voicemail messages to your computer or cloud storage.

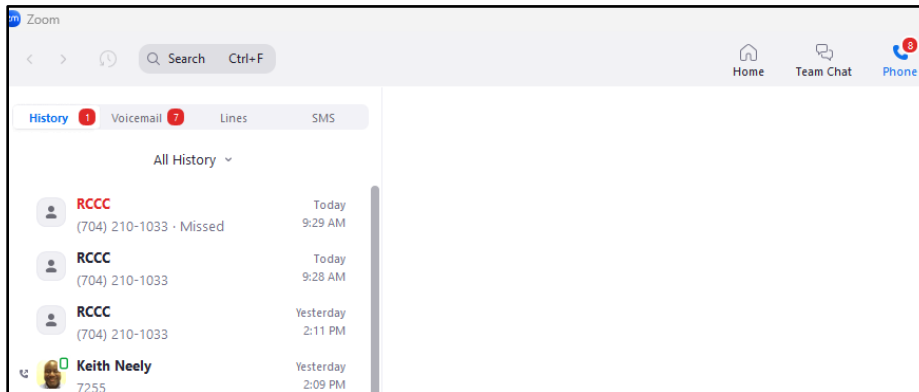
Delete: Allows you to delete the selected voicemail.

Delete All Voicemails: Allows you to delete all voicemails in your account. (If enabled).

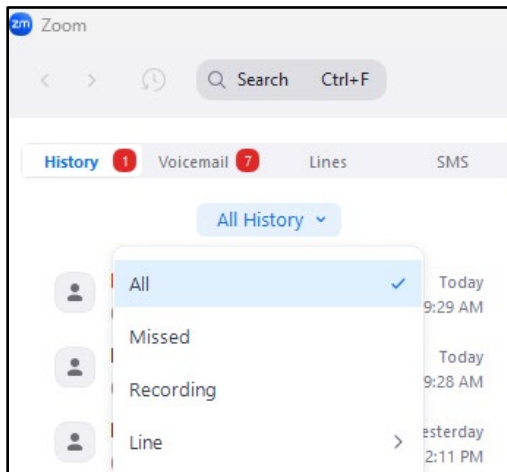


View Call History:

1. Select the “Phone” tab in the Zoom Phone desktop application, then select the “History” tab. Notice the most recent calls you received will display at the top.



2. Select the “drop-down” menu next to All History to filter call history entries by missed or recorded phone calls.



3. Select the “three dots” next to a call history entry to display more options that are available to you.

Send Text message: Allows you to send an SMS message to a number (if enabled).

Share Call Details: Opens a pop-up window that allows you to share the details of the call.

Copy Number: Allows you to copy a number to your systems clipboard.

Create Contact: Allows you to create a contact for Google or Outlook using the call history entry.

Add to Contact: Allows you to add a contact to your personal contacts.

Block Number: Allows you to add the phone number to your blocked list.

Delete: Allows you to delete the selected call history entry.

Clear All Call History: Allows you to delete all call history entries.

Call Duration: Allows you to see the duration of the call in minutes and seconds.

Send Text Message
Share Call Details
Copy Number
Create Contact >
Add to Contact >
Block Number >
Delete
Clear All Call History
Call Duration: 00:00

Desk Phones:

If a Zoom phone has been approved, assigned, and set up for you by the Zoom Phone administrator, you will use it to make and receive phone calls and check your voicemail messages. View the quick start guide for [Yealink T4/T5 series](#) phones to learn more. Most employees will be using the Zoom Phone desktop application that is installed on Rowan-Cabarrus computer.

Note: Desk phones do not support all the Zoom Phone features.



Additional Features:

Once you are familiar with Zoom Phone basic features you can use the links below to further enhance your experience and learn more about the application.

Blocked list: Change your settings to block specific phone numbers from calling you.

Shared voicemail inbox: Share your voicemails with another user within Rowan-Cabarrus.

Customize audio greetings and hold music: Customize the audio for your voicemail and hold music.

Sync contacts with Google and Office 365: Sync your contacts from Google or Office 365.