

Getting Started Guide for Zoom Phone

A user guide for Zoom's modern
enterprise cloud phone solution



First things first.

To ensure you can access Zoom Phone, you'll need to download the latest version of the desktop client from our [DOWNLOAD PAGE](#). The latest client has all the current features available for Phone.

You'll then need to conduct the initial setup of your Zoom Phone. Visit zoom.us/signin or and enter your email address and password. Upon sign in you will be taken to your Profile page. Please navigate to "Personal" and "Phone." If you haven't completed your account setup, select a country, area code, timezone, set your voicemail PIN, then click "Setup."

Select country and area code

United States

Set your timezone. You can change it later in My Profile

(GMT-8:00) Pacific Time (US and Canada)

Set PIN code to listen to voicemail by telephone.

Feature Overview

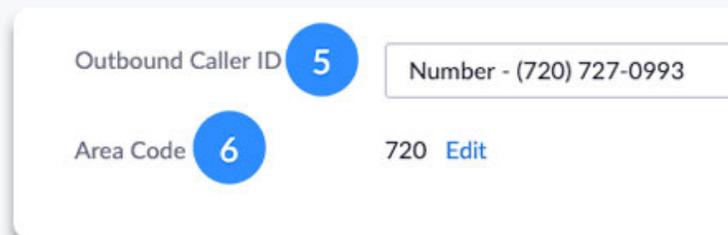
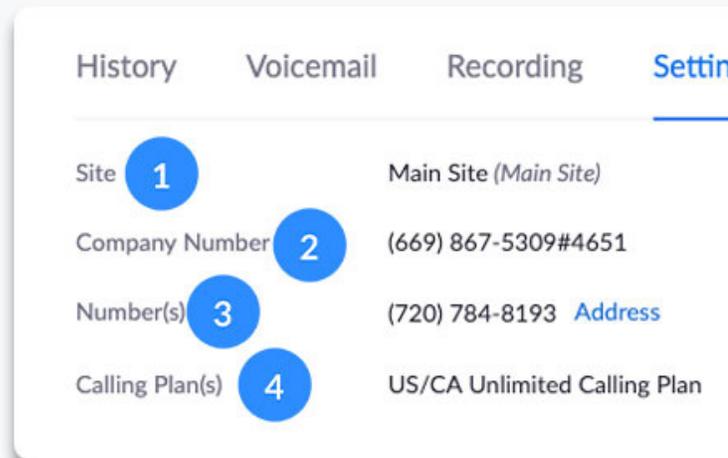
Let's review the settings and features of Zoom Phone.

Settings

Click the Settings tab to view the following information and options:

- 1 Site:** Displays the site you belong to (if your admin enabled multiple sites for your organization).
- 2 Company Number:** Displays the extension number assigned to you and the main company number.
- 3 Number(s):** Displays the direct phone numbers assigned to you. To change the emergency address associated with the phone number, click Address and select an address from the drop-down menu or click Add Emergency Address to add a new one.

Note: The emergency address is provided to first responders when dialing an emergency number. Make sure to enter the correct address.
- 4 Calling Plan(s):** Displays your current calling plan that determines restrictions on your outbound calls.
- 5 Outbound Caller ID:** Select the default caller ID when using the Zoom client to make outbound calls. You can select between the main company number and any direct phone numbers added by your admin. You will still be able to change the outbound caller ID before making a call in the Zoom client.
- 6 Area Code (optional):** Click Set or Edit to change the area code used for local calls.



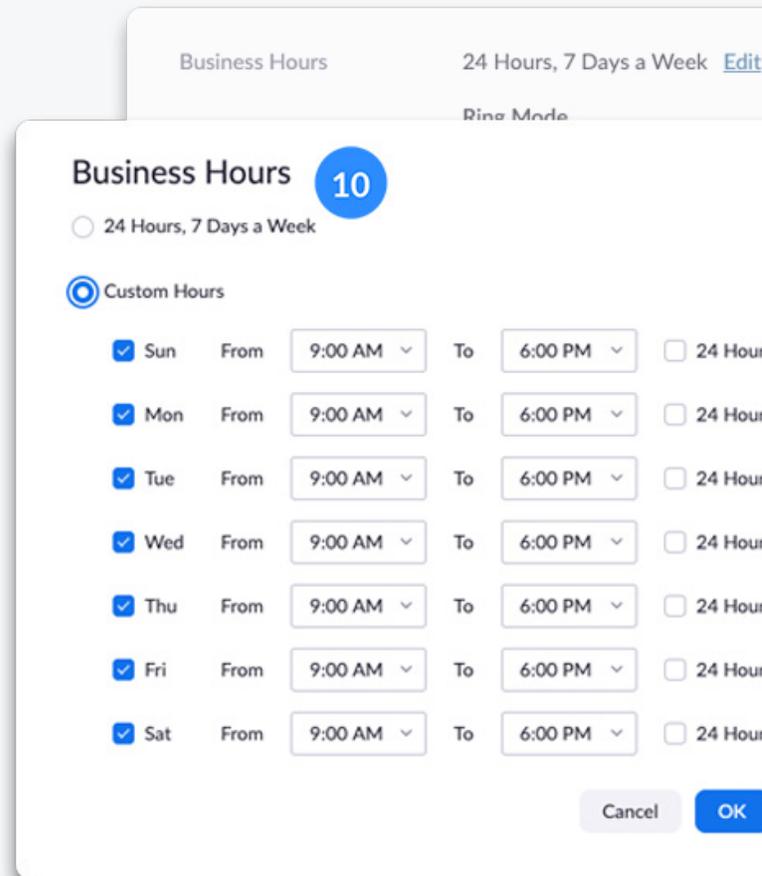
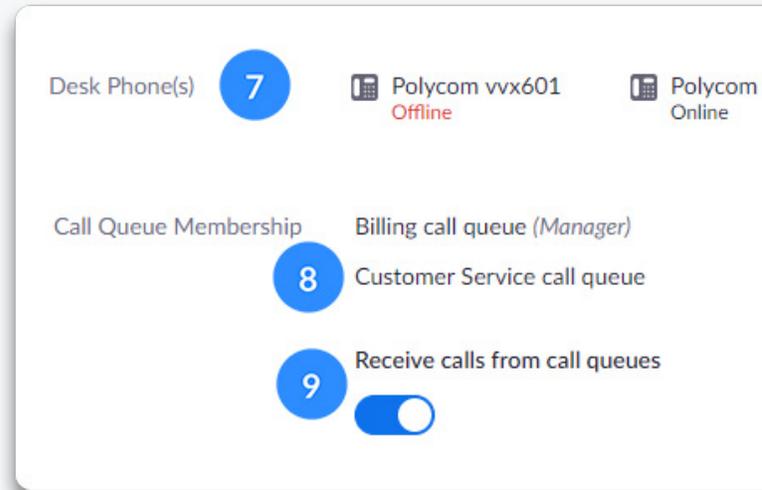
7 Desk Phone(s): Displays any devices added to your account. Phones with an Online status are turned on and provisioned by your Zoom Phone admin.

8 Call Queue Membership: Displays call queues you've been added to. You will also see (Manager) if you've been assigned as the call queue manager. By default, calls to call queues that exceed a max wait time set by your admin will route to the call queue manager.

9 Receive calls from call queues: Click to toggle to disable or enable all calls from call queues you have been added to.

Auto Receptionist Operator: Displays auto receptionists you've been assigned as the operator. By default, the operator is assigned to the 0 key in the Integrated Voice Response (IVR) system. If closed hours are set by your admin, calls during closed hours are routed to the operator.

10 Business Hours: Click Edit to change the times when you can answer calls. By default, inbound calls outside of business hours will be immediately forwarded to the your voicemail.



11 Ring Mode: Select the method to distribute calls during business hours.

Note: Zoom applications refers to both the Zoom desktop client and mobile app.

Select **“Simultaneously”** to ring the Zoom app and specified devices at the same time. After selecting this option, edit the Call Handling & Forwarding option below to specify the routes.

Select **“Sequentially”** to ring the Zoom app and devices one at a time.

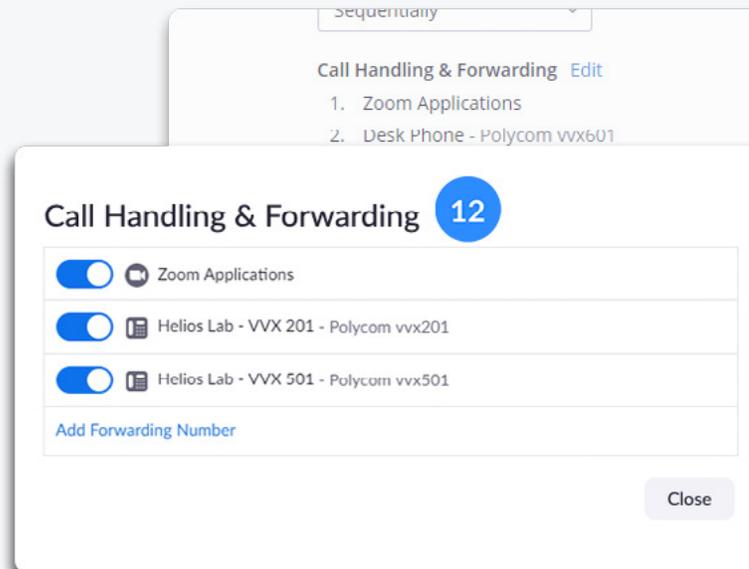
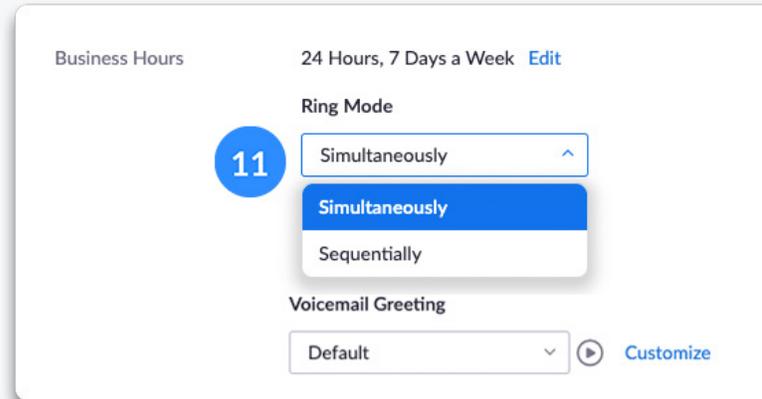
After selecting this option, edit the Call Handling & Forwarding option below to specify the sequence.

12 Call Handling & Forwarding: Click Edit to specify how calls are routed during business hours.

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If you set the Ring Mode to “Simultaneously,” use the toggles to enable or disable each option. Click Add Forward Number to add a custom phone to forward to; for example, you can add your personal phone number.

If you set the Ring Mode to “Sequentially,” use the arrow icons or click and drag to rearrange the order. Click Add Forward Number to add a custom phone to forward to; for example, you can add your personal phone number.



13 Voicemail Greeting: Select a greeting from the drop-down menu or click Customize to record a greeting or upload a supported audio file.

Select “Record by Computer” to record your outgoing voicemail message

If you already have a recorded voicemail message, select “Upload” and select your file.

14 Delegation: Click Add to assign another phone user to answer your calls during business hours. If another user has assigned you to answer their calls, you will see their name and extension below I can assist for. If you don’t want to answer calls for another user, click  beside their extension.

15 Blocked List: Click View or Edit to see a list of numbers and prefixes that are blocked. Numbers and prefixes beside Default are blocked by the admin and applies to all phone users in your organization. Click Add in one of the following sections to block prefixes, numbers, or extensions.

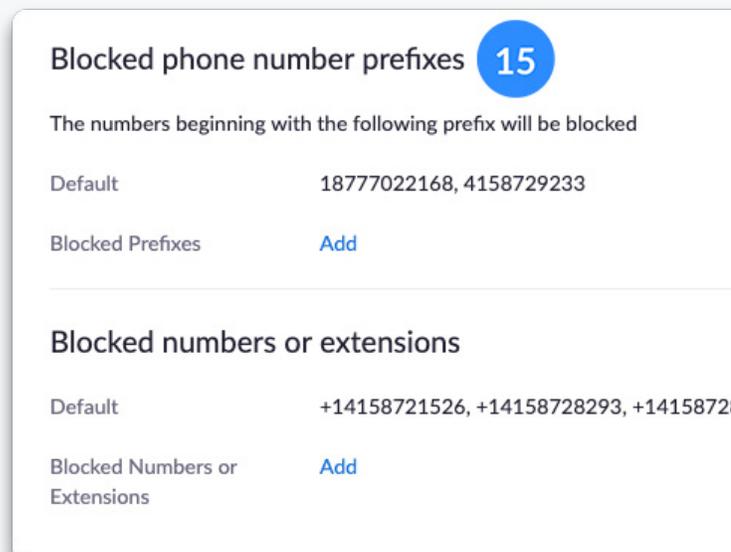
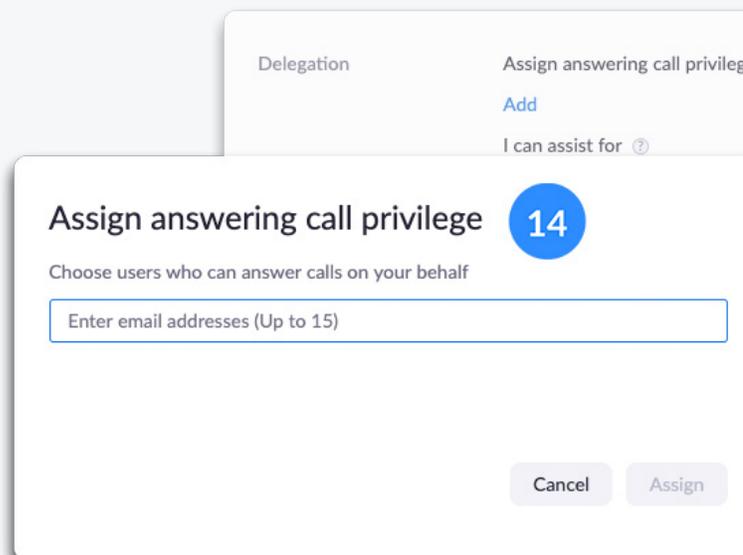
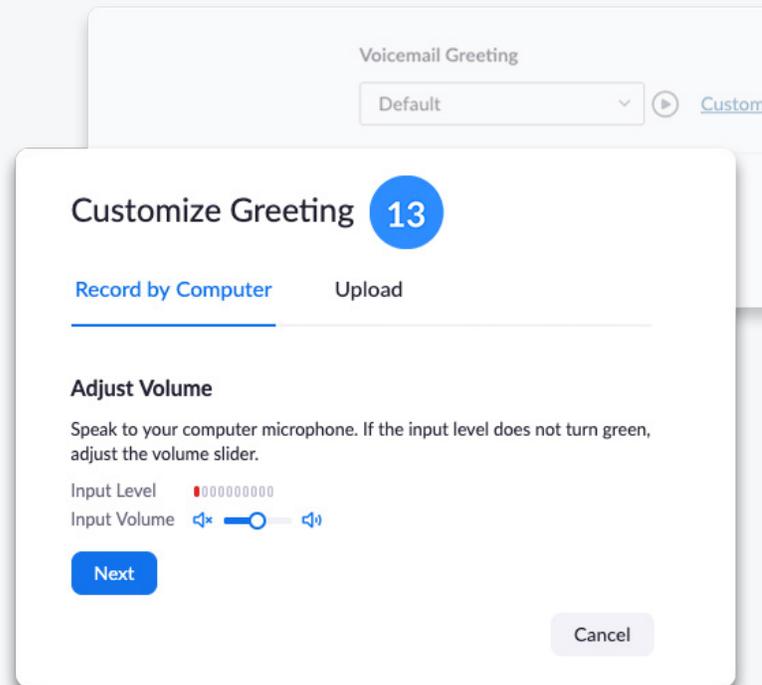
Blocked phone number prefixes: Block all numbers with a specific country code and area code.

Note: For example, entering 1905 blocks numbers with country code 1 and area code 905.

Blocked numbers or extensions: Block a specific phone number or internal extension number.

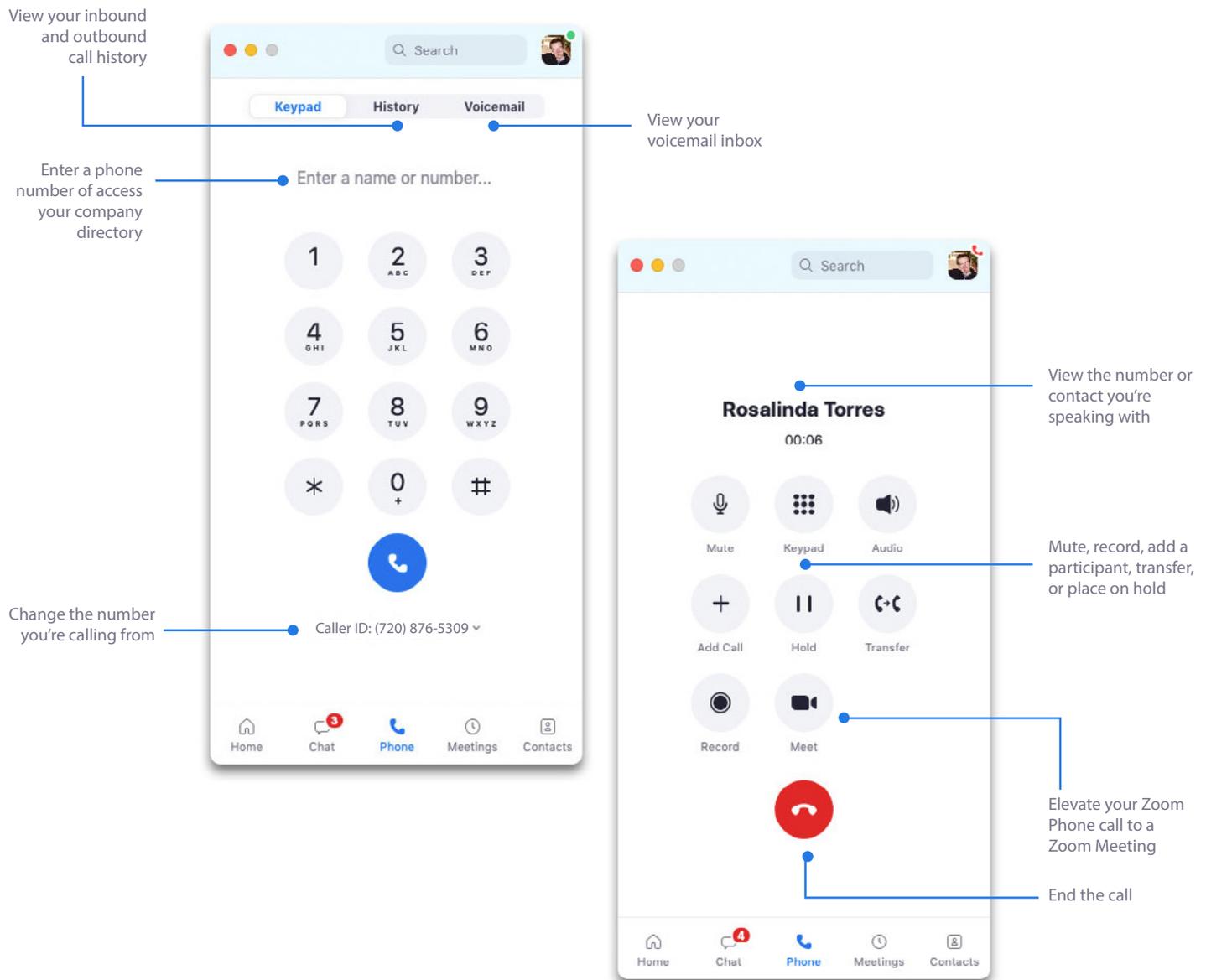
Note: Enter a country code before the number.

PIN Code: Click Show or Edit to enter a 1 to 6 digit voicemail PIN. The default PIN is 000000. The PIN is used when checking voicemail on a desk phone.



Using Zoom Phone

Let's take a quick look at the interface and basic features and functions of Zoom Phone inside the Zoom application.



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