

# 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](https://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.

History Voicemail Recording **Settings**

Site <b>1</b>	Main Site (Main Site)
Company Number <b>2</b>	(669) 867-5309#4651
Number(s) <b>3</b>	(720) 784-8193 <a href="#">Address</a>
Calling Plan(s) <b>4</b>	US/CA Unlimited Calling Plan

Outbound Caller ID <b>5</b>	<input type="text" value="Number - (720) 727-0993"/>
Area Code <b>6</b>	720 <a href="#">Edit</a>

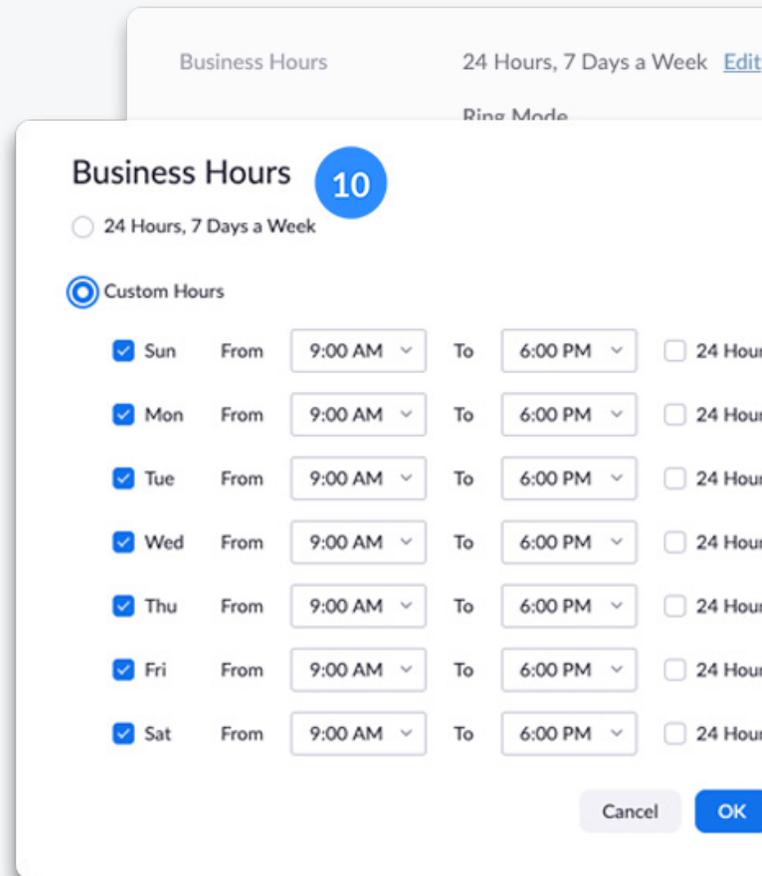
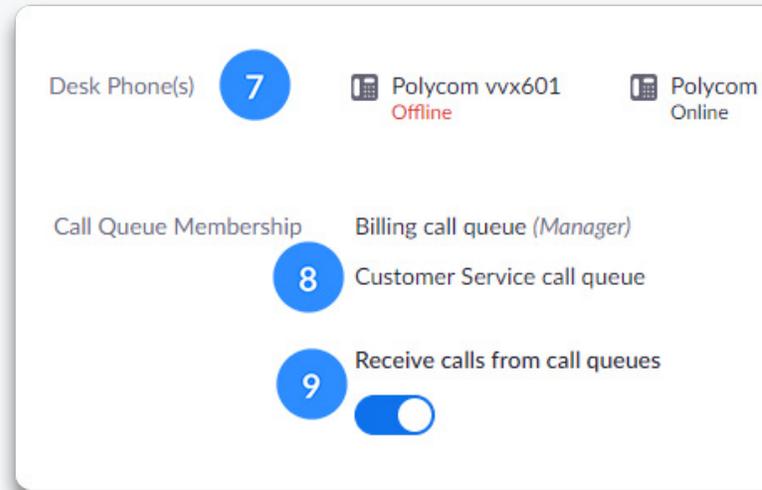
**7 Desk Phone(s):** Displays any devices added to your account. Phones with an Online status are turned on and provisioned by your Zoom Phone admin.

**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.

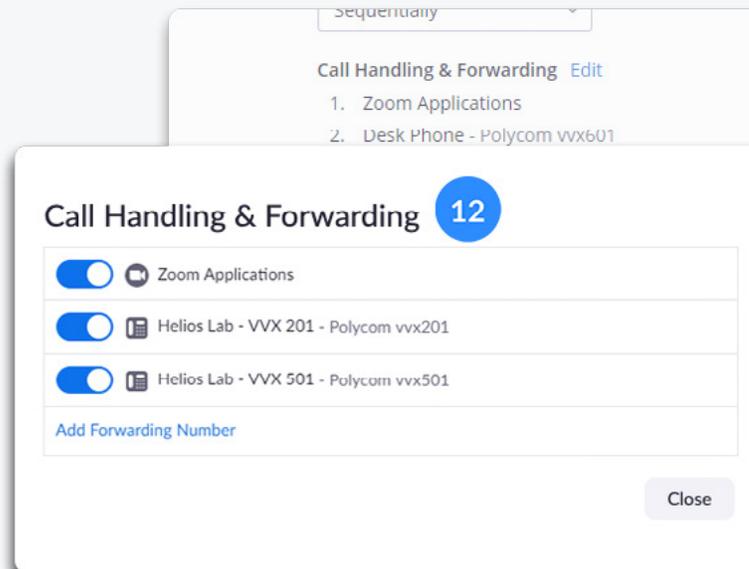
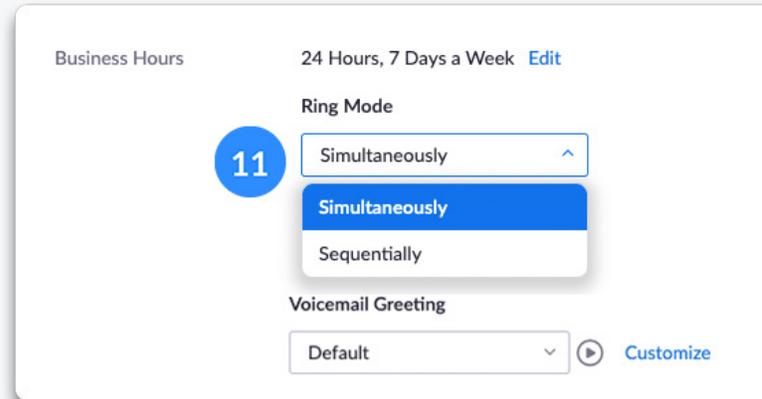
After selecting this option, edit the Call Handling & Forwarding option below to specify the sequence.

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

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

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.

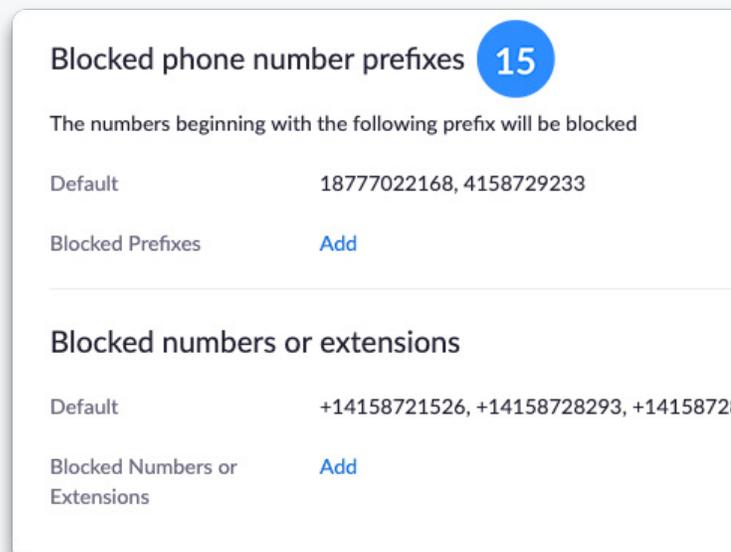
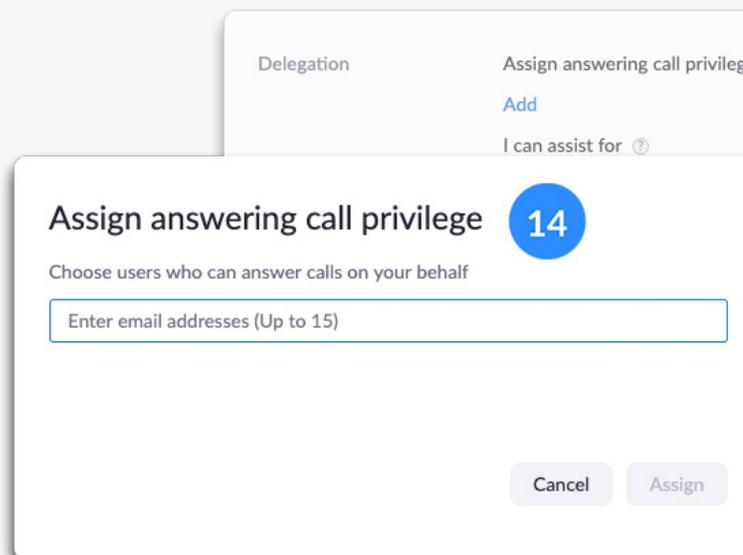
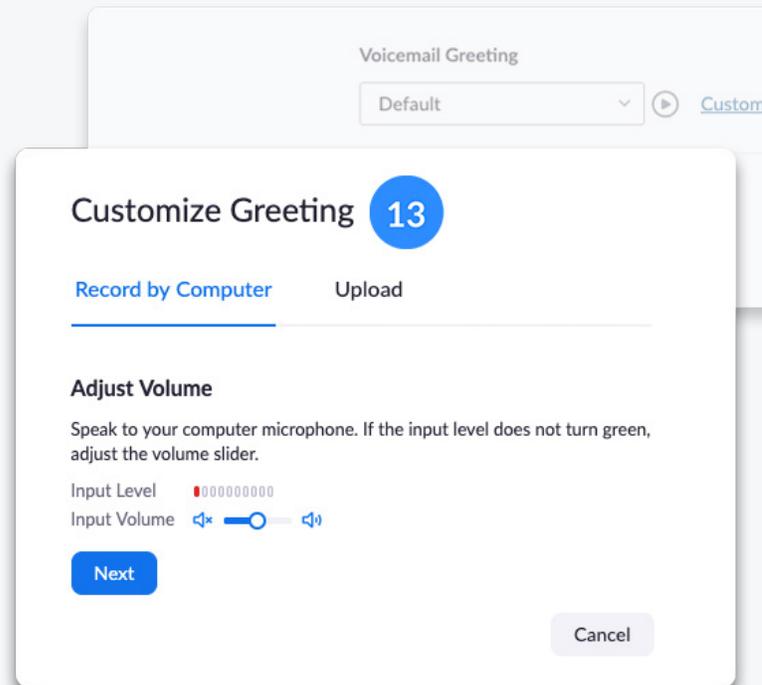
**Blocked phone number prefixes:** Block all numbers with a specific country code and area code.

*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.

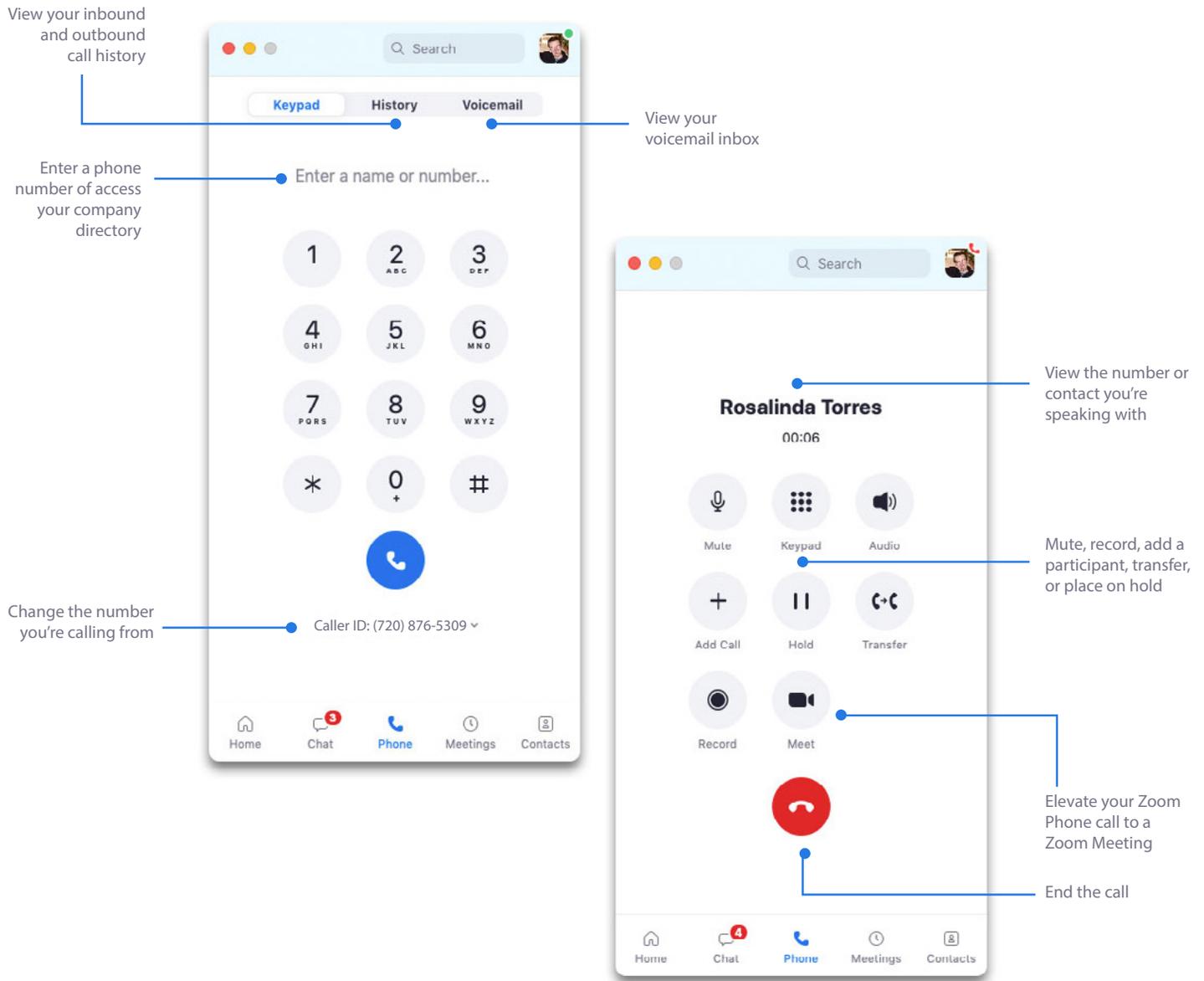
*Note:* Enter a country code before the number.

**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.



**zoom**

## Zoom Phone (Yealink) User Guide

### How to make a call

#### Note:

If you dial a number without the area code, Zoom Phone will use the default area code set in your [Zoom Phone settings](#).

While in a call, your in-call status will be synced with the Zoom desktop client and mobile app. Your Zoom contacts will be able to see that you're in a call.

If calling an [international number](#), make sure that Zoom Phone supports outbound dialing to that number.

To make your desk phone automatically call a number after dialing, your Zoom Phone admin needs to set up a digit map / dial plan using a [provision template](#).

Change your [line key settings](#) to set your default outbound caller ID for desk phones and customize the appearance of line keys.

To make an outbound call using the handset:

Pick up the phone's headset.

(Optional) If you have multiple lines, select a line for the call:

**T4 series with physical line keys:** Press a line key.

**T4/T5 series with a touch screen:** Tap a line key (located on the left or right side of screen).

Dial a number using the phone's physical or on-screen dial pad. You can also enter a name or extension number to search your organization's directory of Zoom Phone users.

**Note:** Search results may take a few seconds to appear.

Press **Send**.

To make a call using the speakerphone:

Press the speakerphone button (usually located in the bottom-right corner of the phone).



(Optional) If you have multiple lines, select a line for the call:

**T4 series with physical line keys:** Press a line key.

**T4/T5 series with a touch screen:** Tap a line key (located on the left or right side of screen).

Dial a number using the phone's physical or on-screen dial pad. You can also enter a name or extension number to search your organization's directory of Zoom Phone users.

**Note:** Search results may take a few seconds to appear.

Press **Send**.

How to search the company directory

Note:

Make sure you have a [desk phone that supports the company directory feature](#).

You can also access the company directory when [making a call](#).

If you can't access the company directory, manually reboot your phone or ask your admin to [re-sync your phone](#).

On the phone's home screen, press Directory.

Navigate to LDAP.

Enter a name or extension number to search your company's directory of Zoom Phone users.

Note: Search results may take a few seconds to appear.

Select a phone user then press Send to call them.

#### How to receive a call

During an incoming call, you will see a call notification with the [caller ID](#) name and number. The call notification on Yealink phones appear the same regardless of whether the call was routed through your direct phone number, main company number, or a call queue you're a member of.

**Note:**

The Zoom desktop client and mobile app display more detailed incoming [call notifications](#) so you can identify calls to a direct number, company number, or call queue.

While in a call, your in-call status will be synced with the Zoom desktop client and mobile app. Your Zoom contacts will be able to see that you're in a call.

#### T4 series without touchscreen



### T4 series with a touchscreen



### T5 series with a touchscreen



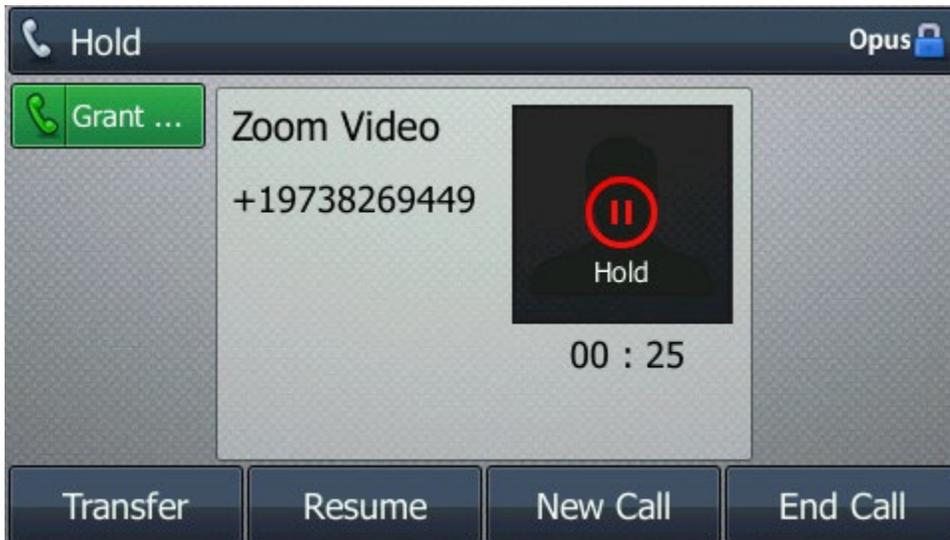
## How to place a call on hold

### T4 series without touchscreen

1. While in a call, press **Hold** or press the hold button .



2. Press **Resume** or press the hold button  to resume the call.



## T4 series with a touchscreen

1. While in a call, tap **Hold** on the touchscreen or press the hold button .

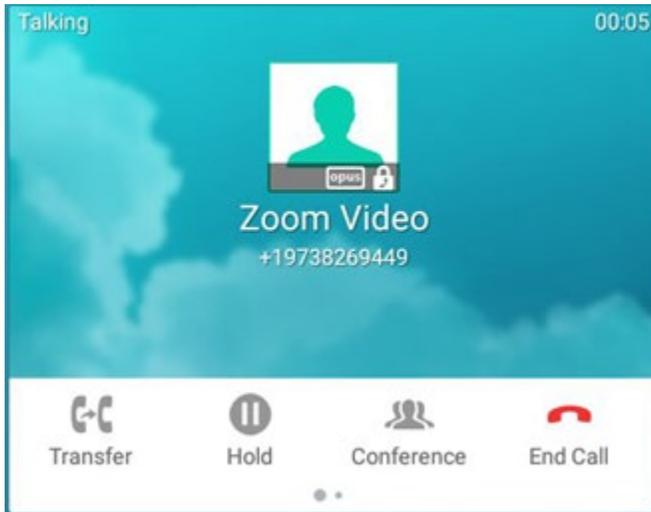


2. Tap **Resume** on the touchscreen or press the hold  button to resume the call.



## T5 series with a touchscreen

1. While in a call, tap **Hold** on the touchscreen or press the **Hold** button .



2. Tap **Resume** on the touchscreen or press the hold  button to resume the call.



## How to transfer a call

### T4 series without touchscreen

1. While in a call, press **Transfer** or press the transfer button .



2. Dial the number you want to transfer to. To transfer to an internal Zoom Phone user, dial their extension number.



Choose a transfer method:

**Blind transfer:** Press **B Transfer** to immediately transfer the call and hang up.

**Warm transfer:** Press **Send** to place the call on hold while you complete the transfer. This option is useful if you need to navigate an automated answering machine for the caller or if you want to speak to the receiving party before your call is transferred. Tap **Transfer** to complete the transfer.



T4 series with a touchscreen

1. While in a call, tap **Transfer** or press the transfer button .



2. Dial the number you want to transfer to. To transfer to an internal Zoom Phone user, dial their extension number.



3. Choose a transfer method:

**Warm transfer:** Tap **Send** to place the call on hold while you complete the transfer. This option is useful if you need to navigate an automated answering machine for the caller or if you want to speak to the receiving party before your call is transferred. Tap **Transfer** to complete the transfer.



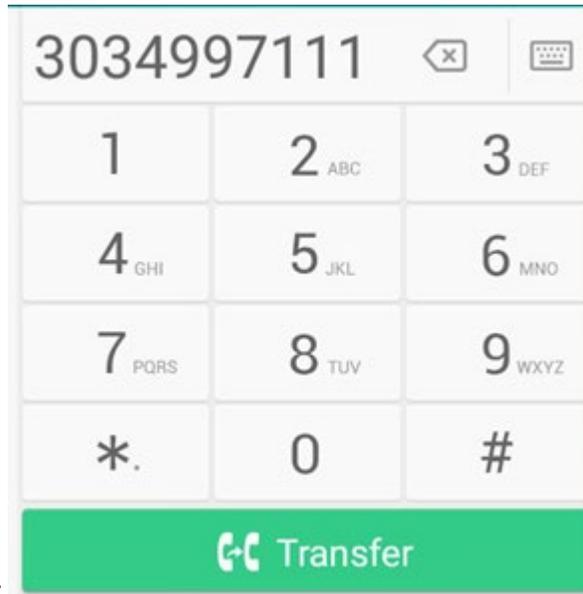
- **Blind transfer:** Tap **B Transfer** to immediately transfer the call and hang up.

### T5 series with a touchscreen

1. While in a call, tap **Transfer** or press the transfer button .

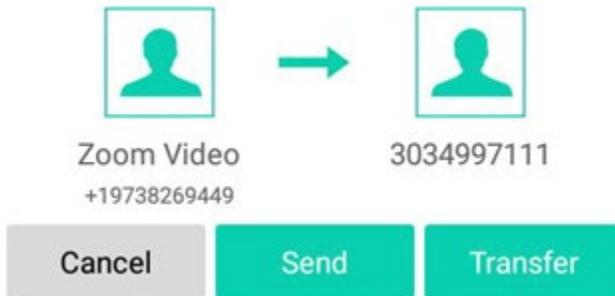


2. Dial the number you want to transfer to. To transfer to an internal Zoom Phone user,



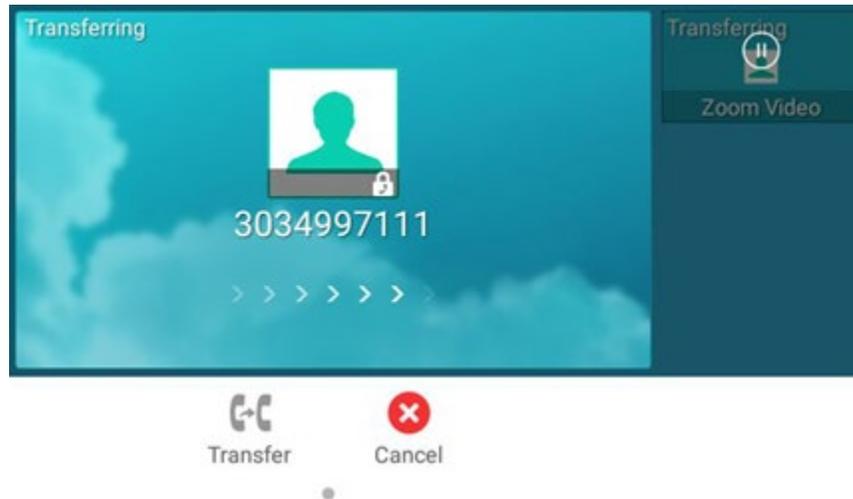
dial their extension number.

3. Tap **Transfer** and choose a transfer method:



- o **Warm transfer:** Tap **Send** to place the call on hold while you complete the transfer. This option is useful if you need to navigate an automated answering machine for the caller or if you want to speak to the receiving party before

your call is transferred. Tap **Transfer** to complete the transfer.



- **Blind transfer:** Tap **Transfer** to immediately transfer the call and hang up.

How to start a three-way call

[Make a call.](#)

Tap or press Conference.

The current call will be placed on hold.

Enter or select number that you want to add to the call, then tap or press Conference.

A new call will start.

Tap or press Conference to merge the two calls in to a three-way call.

How to view call history

T4 series without touchscreen

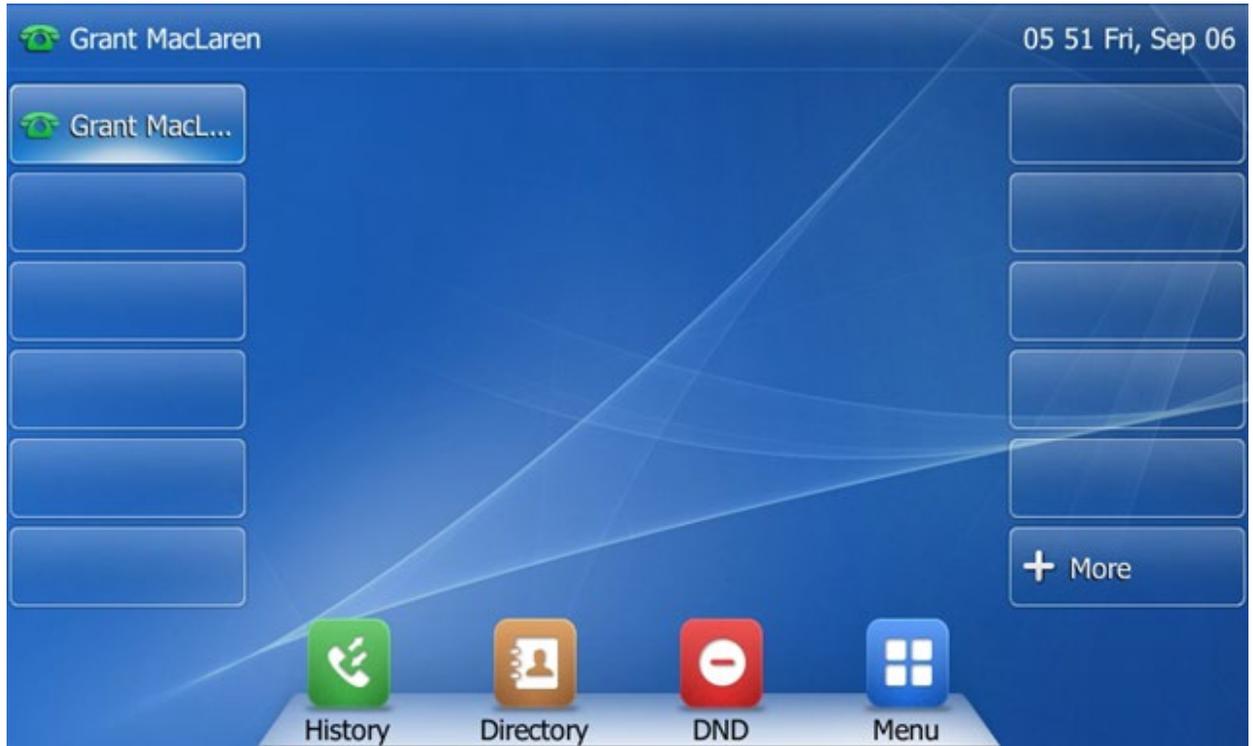
1. Press the **History** button.



2. Use the directional pad to navigate call history.
3. Press **Send** to call back.

### T4 series with a touchscreen

1. Tap **History** on the home screen.



2. Use the directional pad or touchscreen to navigate call history.
3. Tap the caller ID name or number to call back.

## T5 series with a touchscreen

1. Tap the call history icon  on the home screen.



2. Use the touchscreen to navigate call history.
3. Tap the caller ID name or number to call back.

### How to check voicemail

Note: If you have to access a [shared voicemail inbox](#), you can play them using your desk phone, but you can't identify if the message is from a shared inbox. Use the Zoom desktop client, mobile app, or web portal to identify if the message is from a shared inbox.

Access the voicemail message center:

Press the Message button  on the device.

Alternatively, you can dial and call \*86 on your desk phone access the voicemail center.

When prompted, dial your [voicemail PIN](#) followed by #.

Press one of these keys:

Key	Description
1	Play all voicemail messages starting with your new (unplayed) messages.

- 2 Record a voicemail greeting. The greeting will be added to your Zoom Phone [audio library](#).

Note: You can also [record a voicemail greeting in the Zoom web portal](#). Follow the audio prompts to manage your voicemails.

### How to set status to DND (do not disturb)

You can set your phone's status to DND (do not disturb) if you want to block all incoming call notifications to your desk phone.

**Note:**

The DND status only applies to the phone you set it on. This status does not sync on other desk phones assigned to you or the Zoom desktop client or mobile app. Setting status to DND will disable all on-screen and sound notifications for inbound calls.

### T4 series without touchscreen

1. Press the **DND** button on the home screen.

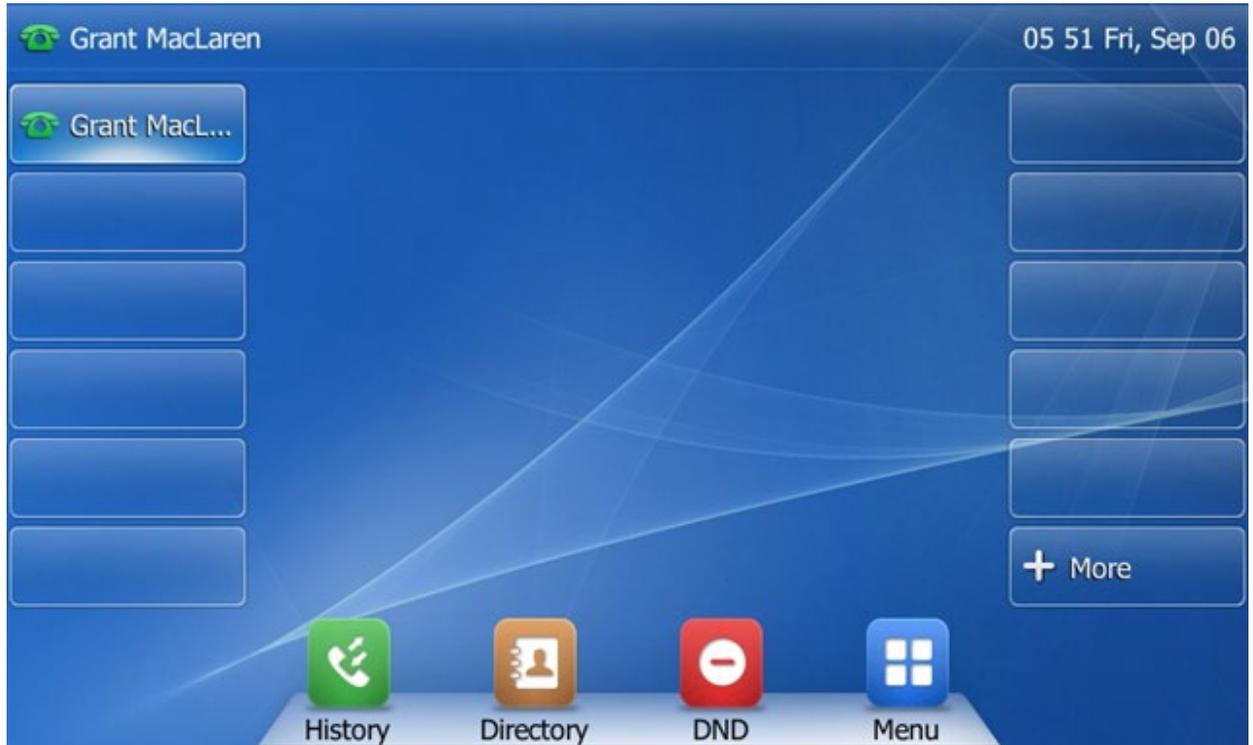


You will see this icon at the top of the screen: .

2. Press the same button to reset your status.

## T4 series with a touchscreen

1. Tap the **DND** button on the home screen.

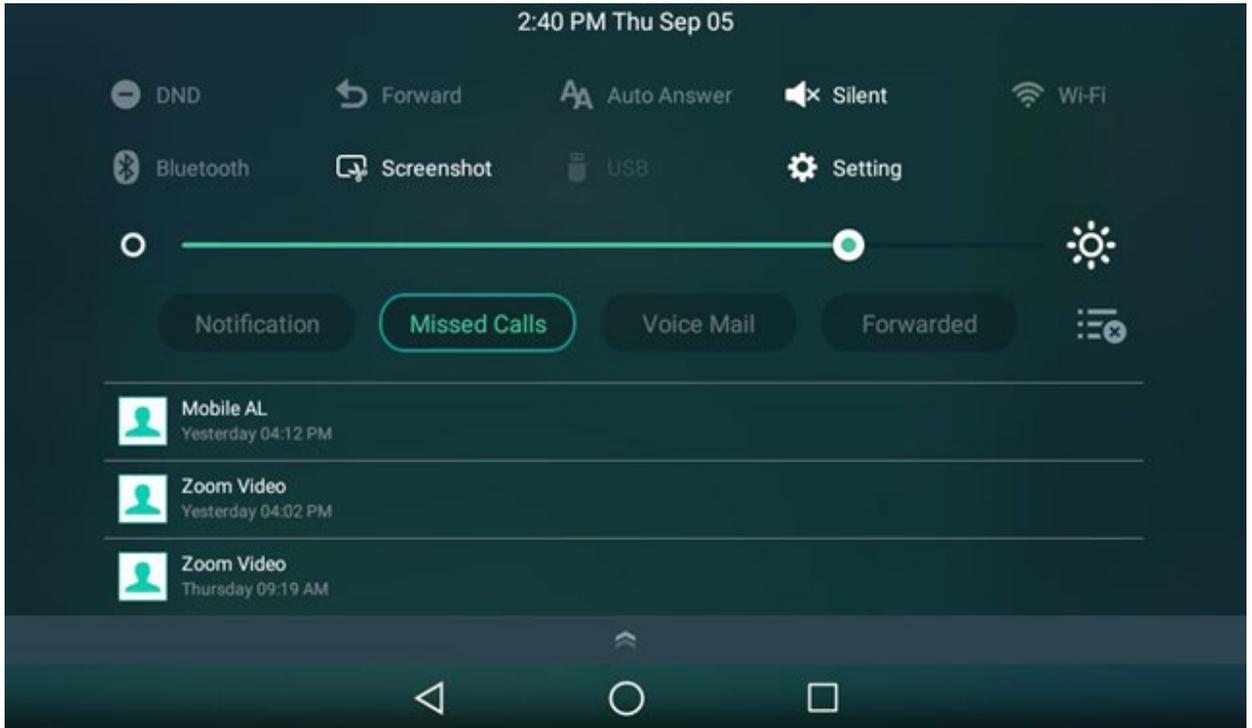


You will see this icon at the top of the screen: .

2. Tap the same button to reset your status.

## T5 series with a touchscreen

1. Swipe down from the top of the screen and tap **DND**.



You will see this icon at the top of the screen: .

2. Repeat the previous steps to remove the status.

### How to use line keys

You will see multiple lines on your phone in these scenarios:

You have more than one direct phone number.

You're assigned to make and receive calls on behalf of another user (you're the delegate as part of a [call delegation](#) setup).

You're a member of a [shared line group](#).

### Line key labels

**Note:** You can [customize your line keys](#) to change their labels and order. By default, line keys are labelled differently depending on the number of direct numbers or shared lines: If you only have one direct number or don't have a direct number, the line key label will display your name.

If you have more than one direct number, the line keys will display the number.

If you have call delegation, see our [call delegation guide for desk phones](#) to learn more.

## Selecting a line before making a call

1. Select a line:
  - **T4 and T5 series with a touchscreen:** Tap the line key on the phone's home screen.
  - **T4 series without a touchscreen:** Press the physical line key on the phone. The line key light turns solid green to indicate you're using it.

2. Pick up the phone's headset, or press the speakerphone button (usually located in the bottom-right corner of the phone).



3. Dial a number using the physical or on-screen dial pad.
4. Press or tap **Send**.