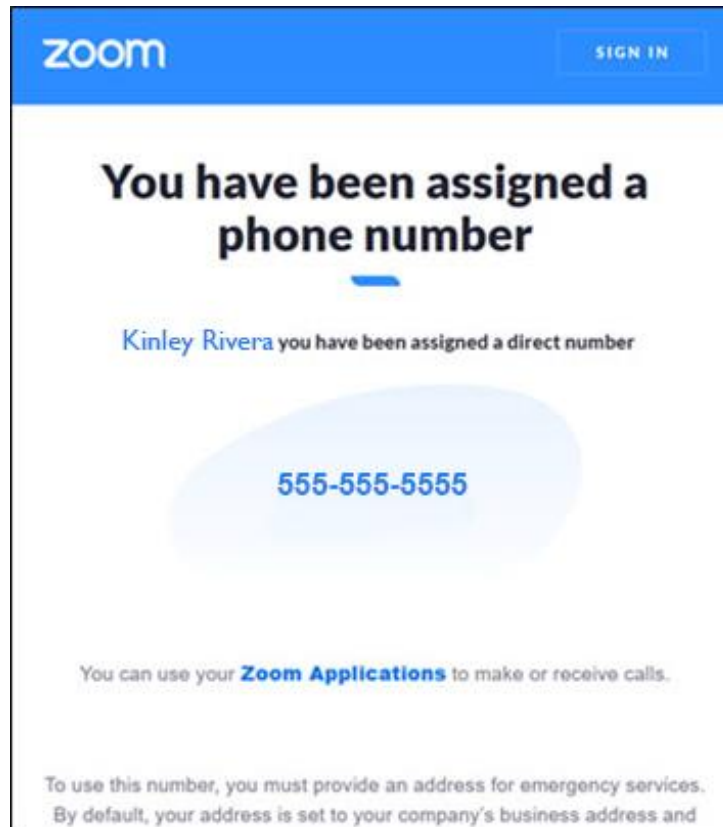


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## Logging In and Initial Setup

When your Zoom Phone license is assigned, you will receive an email from Zoom. The email subject line is “[EXT] You have been assigned a direct number”. You can use the “**Zoom Applications**” link at the bottom of the email to open the Zoom web portal or you can navigate to <https://zoom.us/signin>

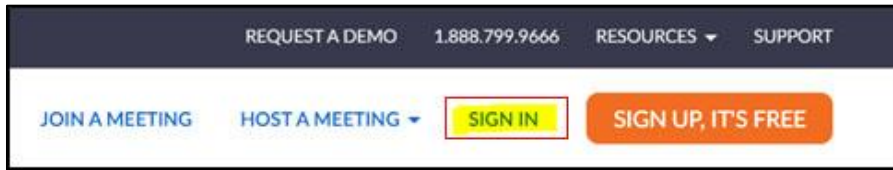


Steps 1 through 4 in this user guide are used to log into the university’s Zoom account and not a personal Zoom account

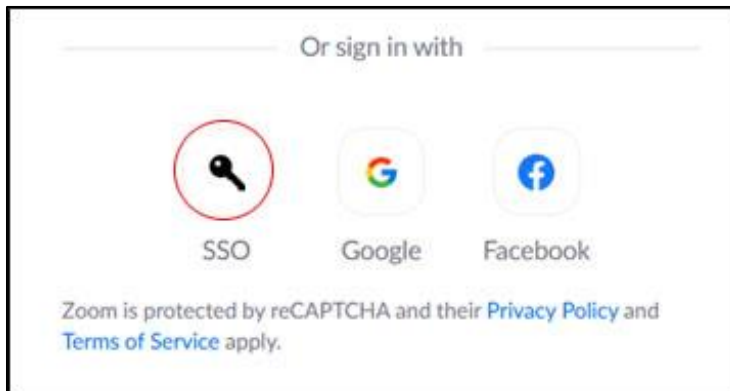
1. Click the **Zoom Applications** link at the bottom of the email to open the Zoom web portal

You can use your **Zoom Applications** to make or receive calls.

2. Click the **SIGN IN** button. Note, if you do not see a SIGNIN link at the top of the page, you are already signed in



3. Scroll down and click SSO (Single Sign-On) button to sign into university's Zoom account

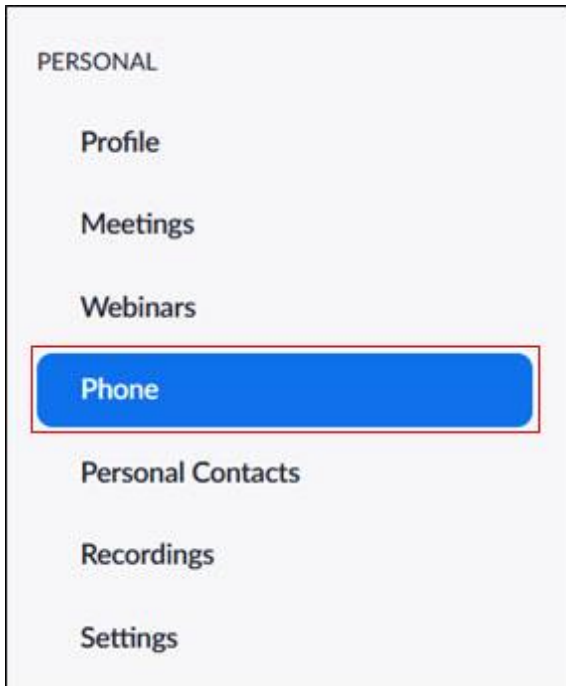


4. Enter SDSU in the **Company Domain** field and click **Continue**



## Logging In and Initial Setup, Continued

1. Once logged into the university's Zoom account, click the **Phone** button



2. On the **Quick Setting Your Extension of Zoom Phone** page, confirm your time zone is correct
3. The PIN code is used to check voicemail from a Polycom VVX desktop phone. *Note, you do not need a PIN to check voicemail using the Zoom app*
4. Click **Set** to enter your area code. *Note, a window appears*



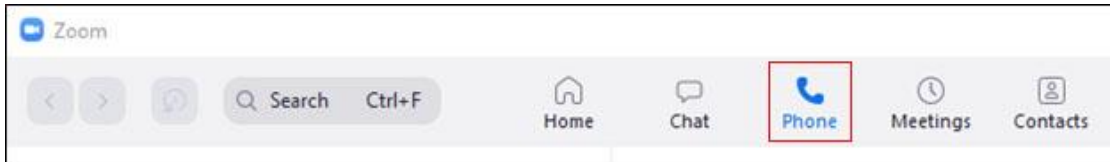
5. In the **Set** box enter your area code and click the **Save** button



## Using Zoom Phone - Place and Receive Calls

After setup, you can make and receive calls using Zoom Phone.

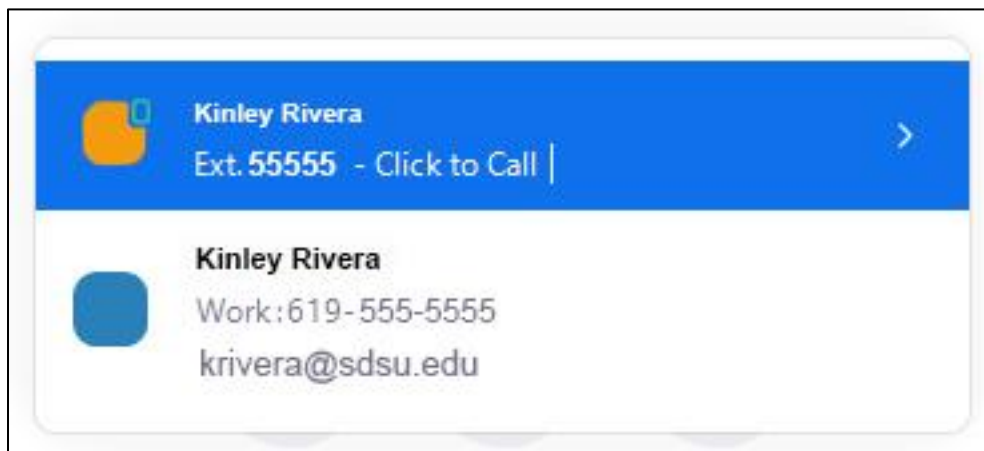
1. To place a call click the **Phone** button



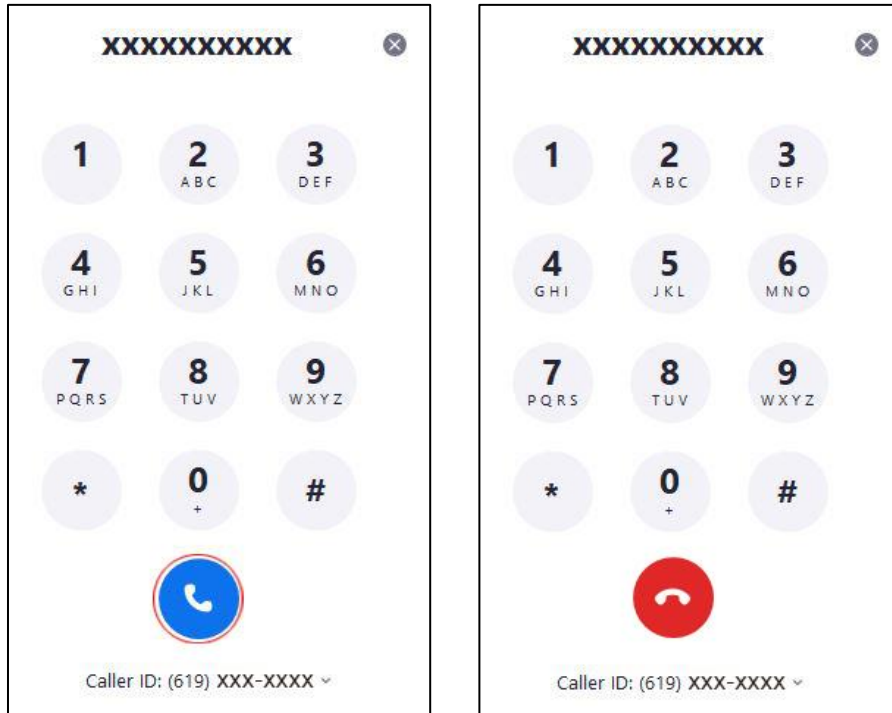
2. In the **Enter a name or number...** box enter the contact's last name or 5-digit campus extension. *Note, a window appears with the contact's name and number. Their profile picture will also have a small icon showing their presence status*



3. Click to place a call



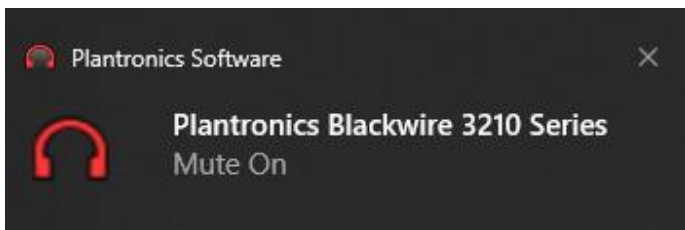
4. To dial an off-campus number enter the 10 digit extension with area code.
5. Press the telephone button. *Note the telephone button turns red when dialing party.*



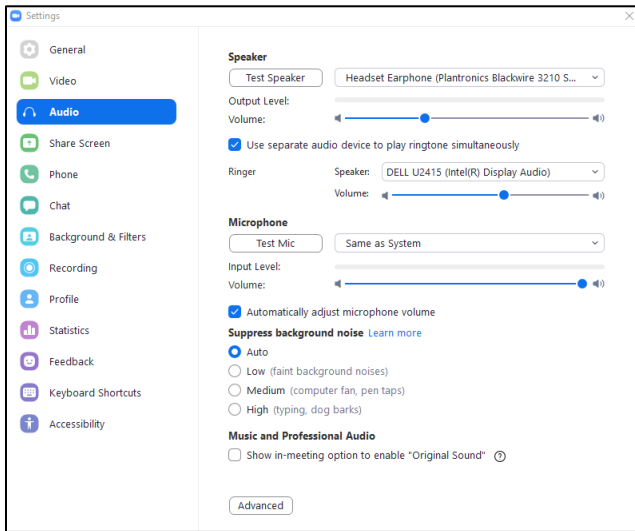
## In-Call Controls

While in a call you can access in-call controls like Mute, Adjust Audio Settings, Add Call, Hold, Transfer, Record Call, Meet (Elevate to Zoom Conference Call), Park Call and Invite to Meeting

- **Mute:** Press the **Mute** button automatically mute your headphones.

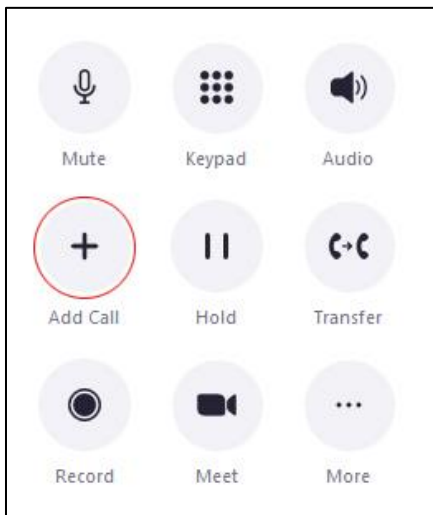


6. **Audio:** Press the **Audio** button to access your PC's sound settings.

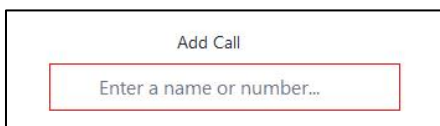


## Add Call:

1. With the first party on the line, click the **Add Call** button



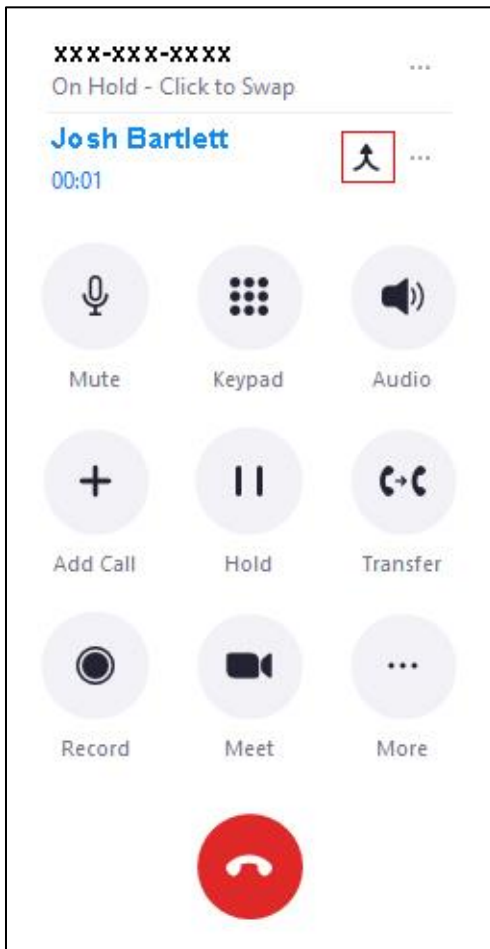
2. In the **Enter a name of number...** box enter the contact's last name or number. *Note, the first name, last name appears.*



3. Click to call the second party. *Note, the first party is placed on hold.*

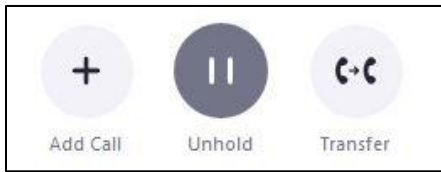


4. Click the **Add Call** button



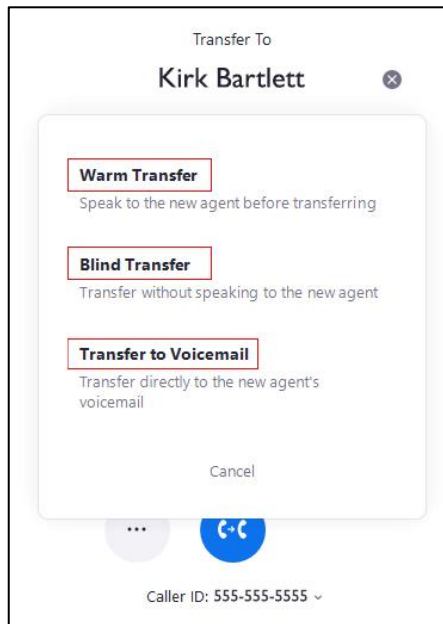
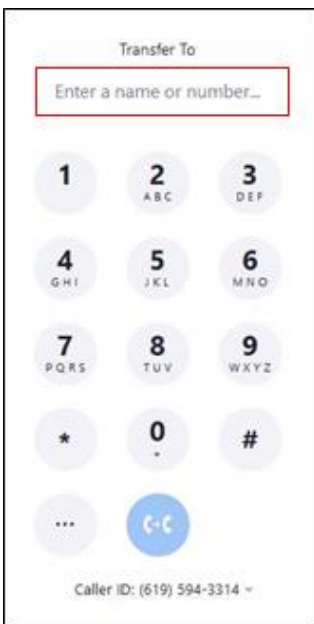


**Hold:** Caller will hear music while on hold



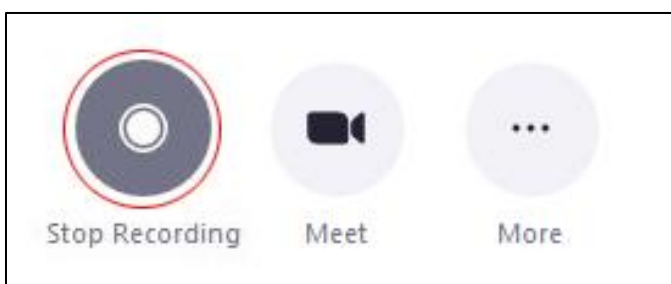
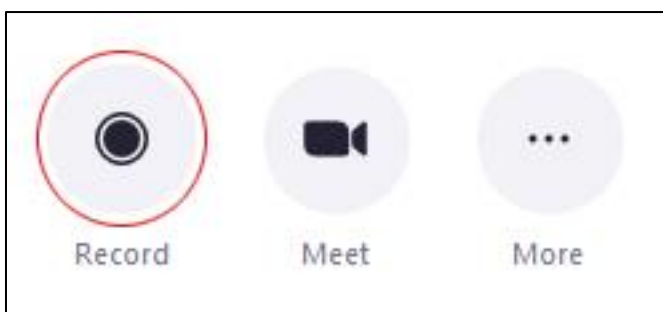
**Transfer:** In the **Transfer To** window input the name or number in the **Enter a name or number...** box. *Note, a pop-up window appears.*

Select a call transfer options (Warm Transfer, Blind Transfer, Transfer to Voicemail).



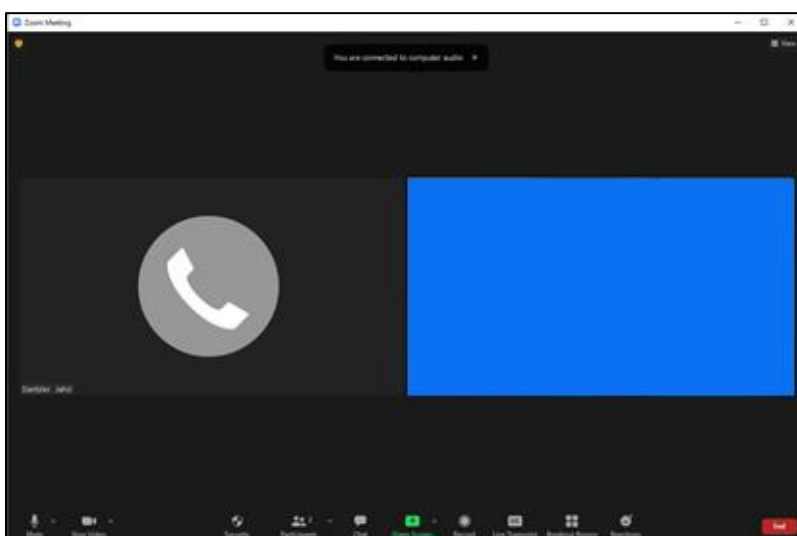
- a. **Warm Transfer:** Places your call on hold while you complete the transfer. This option is useful if you need to navigate an automated answering machine for the caller or if you want to speak to the receiving party before your call is transferred.
- b. **Blind transfer:** Transfers the call to the number and immediately hang up your call. If there are any phone menu prompts, the other party will have to complete them.
- c. **Transfer to voicemail:** Transfers the call to the voicemail of a specified phone number. This transfer method might not work for all numbers. You can also transfer to voicemail by using DTMF codes (keypad codes using \*).

**Record:** Press the **Record** button to record the call. When activated the caller will hear “this call is being recorded”. Press **Stop Recording** button again to end the recording. The caller will hear “the recording has stopped”



**Meet:** Elevate or invite a call to a Zoom meeting

If you make a call using Zoom phone, you can easily convert or elevate the phone call to a Zoom meeting. The other user can be on an external phone service, Zoom desktop client or Zoom mobile app.



1. Sign in to Zoom desktop client or mobile app.

2. Click **Meet** using the in-call controls. Note, If waiting room is enabled for everyone and the bypass option is enabled, the other call participant will bypass the waiting room. If you added a caller to the current call, merge the two calls to start a three-way call before elevating to a Zoom meeting. If you don't merge, the meeting will only start with the active call.

The following scenarios will happen depending on whether the other call participant using Zoom Phone (desktop client, mobile app) or regular phone line:

- Zoom Phone (desktop client or mobile app): The other call participant will join the meeting if they accept the invite. If the user declines, the phone call will end.
- Zoom Phone (provisioned desk phone): The other call participant will automatically join the meeting using phone audio.
- External phone service: The other call participant will automatically join the meeting using phone audio.
- Three-way call: If you have a three-way call, the above points still apply.

**Park Call:** Call Park allows phone users to place a call on hold and let another phone user to resume the call from any phone or Zoom client. After parking a call, Zoom Phone generates a retrieval code. Any other phone user can use the retrieval code to resume the call.

#### **Park Call (Desktop Client or Mobile App):**

1. Sign in to the Zoom desktop client or mobile app
2. Make or receive a call
3. Click or tap More using the in-call controls
4. Click or tap Park. Note, you will see a notification with the 3-digit retrieval code (preceded by \*). You will not hear an audio prompt stating the retrieval code. The call will be parked and the other call participant will be placed on hold. Note, the call participant on hold will hear the default Zoom hold music. Currently, you can't customize the hold music for parked calls. Take note of the 3-digit retrieval code and send it to the phone user who will answer the parked call. Note: You can resume the parked call and place it back to the same 3-digit retrieval code. The call will be parked back to the same 3-digit retrieval code within a call duration of 30 seconds.

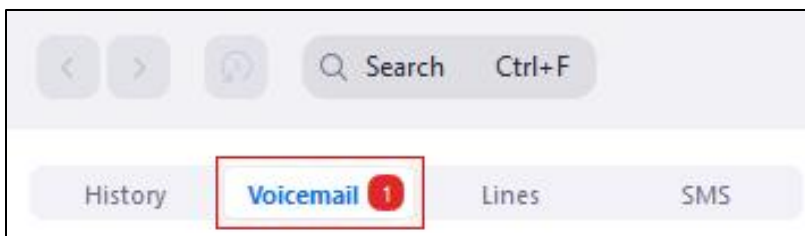
## Voicemail

Voicemail messages can be up to 5 minutes in length. You can also change your settings to disable voicemail during your business or closed hours; and customize your voicemail greeting. There is currently no storage limit for voicemails. Note: Voicemails are synced between the Zoom desktop client and mobile app. This includes the notification icon. For example, if you play a new voicemail message in the desktop client, it will also remove the notification icon on the mobile app.

1. Click the **Phone** button.



2. Click the **Voicemail** tab. Note, in this example there is one unheard message.



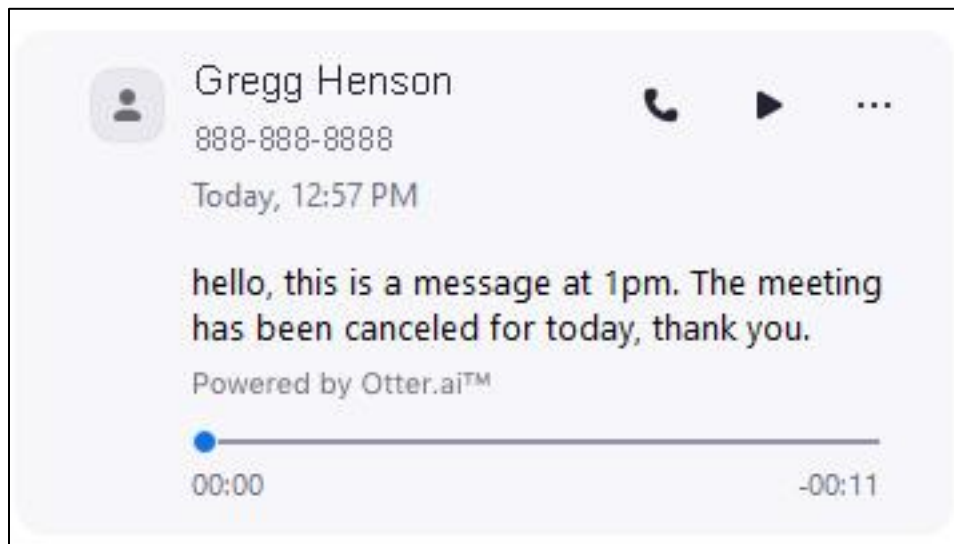
3. Hover over the name and number. Note, the **Call** and **Play** icons appear.



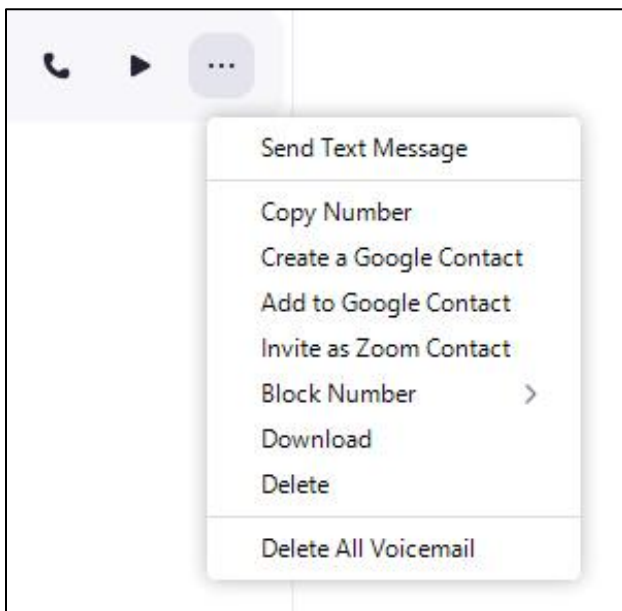
4. Press the Phone button to return the call.
5. Press the arrow button to listen to the message. Note, a new window appears.



6. The caller's message plays. Zoom will automatically transcribe the message.



7. Hover over the three dots ... to delete the voicemail message or all messages.

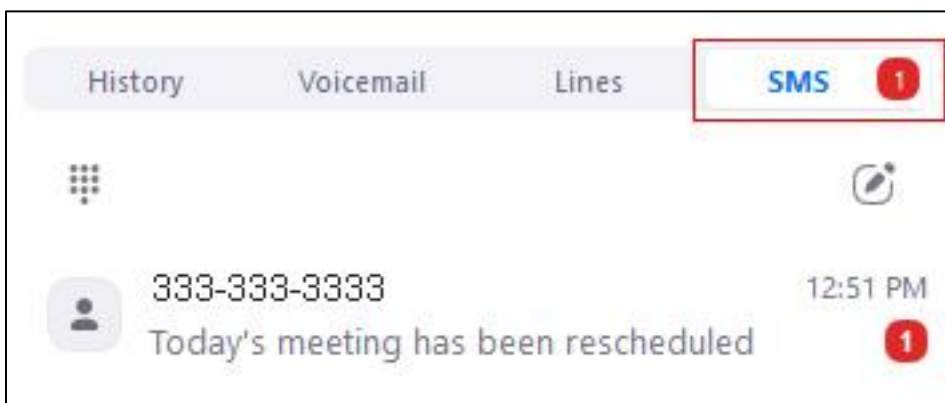


# Zoom Phone SMS

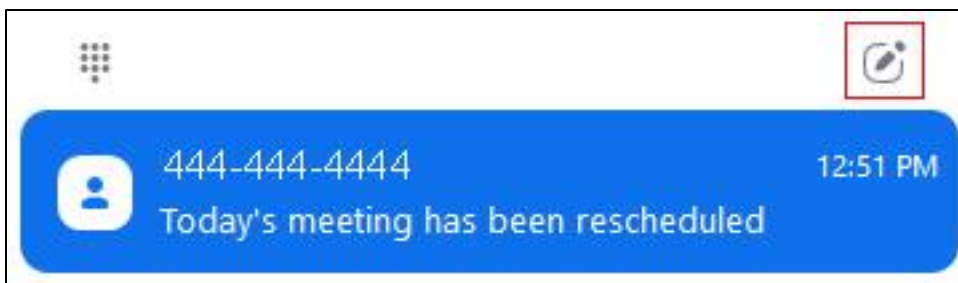
1. Click the **Phone** button.



2. Click the **SMS** tab. Note, in this example there is one SMS message.



3. Click or tap the **Compose** icon to reply.



4. Enter a message

5. Click the **File** icon (optional) to include a file attachment

6. Click the Enter key on your keyboard to send the message



## Emergency Address

**NOTE:** Emergency dialing function will be tested during the pilot.

**IMPORTANT—Emergency location information.** SDSU will be testing 911 support with Zoom Phone on campus network locations to assist emergency responders in finding callers.

The testing will track a 911 call while on SDSU WiFi, it may show the building address or general area, not your exact location. Provide the 911 operator with more accurate location information when calling.

Zoom will automatically detect mapped campus locations and locations you have entered under **Emergency Address** in Phone > Settings, such as your work from home address. (See Setting Up Zoom Phone.)

When Zoom detects that you are at a new location, you will see a small red arrow in Zoom Phone. Click to expand it to a message asking you to update your location, to have it current in case of 911 calls. Whenever you return to that location it will recognize it and not ask you again.

Emergency responders will *not* know your location if you are off campus, have not entered your address in Zoom Phone settings, and you call 911 from Zoom Phone.

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