

Zoom Phone Setup Guide

On the day your Zoom Phone is provisioned there are a variety of settings on the Zoom website that you will want to configure to meet your personal business needs.

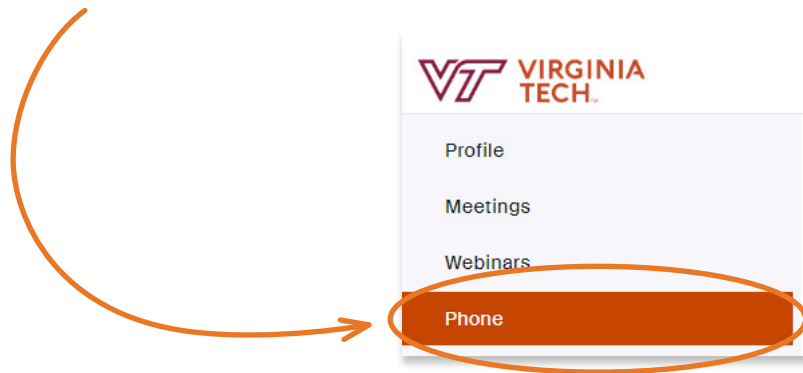
This document will help highlight some of the more important features Zoom Phone offers.

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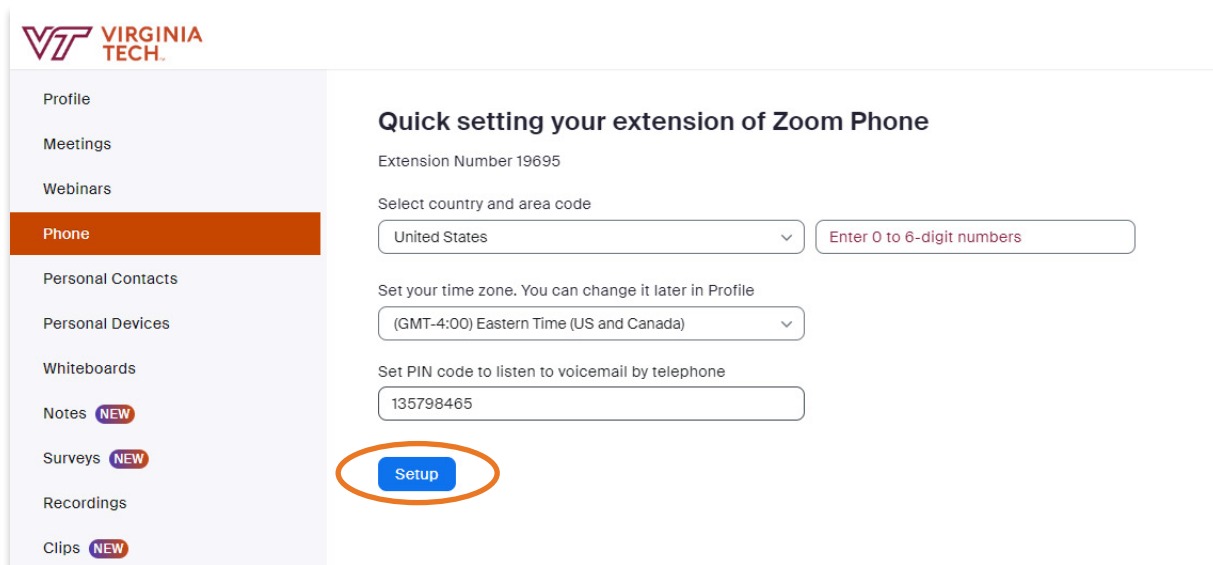
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Website Login

1. Sign-in at [My Profile - Zoom](https://viriniatech.zoom.us) (viriniatech.zoom.us).
2. Click on the Phone tab on the left.



The very first time you log on to this page, you will need to click on the blue **Setup** button to provision the voicemail.



To setup your emergency address, please use the guide provided by NI&S:

[Setting up Zoom Emergency Locations.](#)

Please note that calling 911 directly from your cell phone provides the dispatchers the most thorough and accurate automatic location information and will be updated as you move.

Call Handling

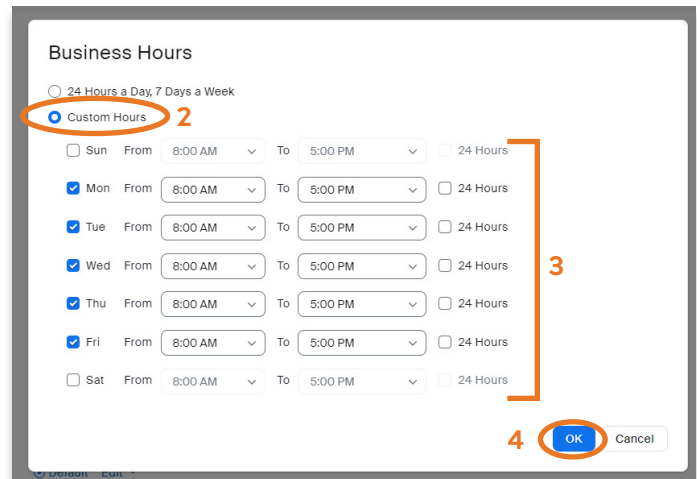
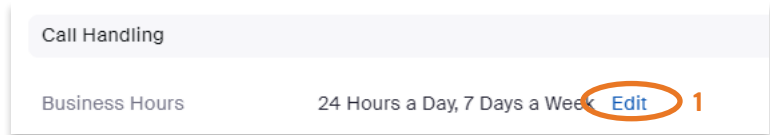
Scroll down to the Call Handling section.

Business Hours

If you leave your business hours set to 24/7, all of the settings in this section will apply all the time. If you set custom hours, a second section called “Closed Hours” will appear. You then will have all the same options repeated for hours you are not available.

To change your business hours:

1. Click on **“Edit”**.
2. Select **“Custom Hours”**.
3. Configure your hours and days of the week.
4. Click **“Ok”**.

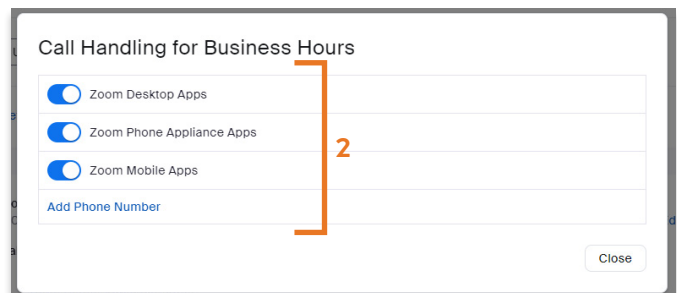
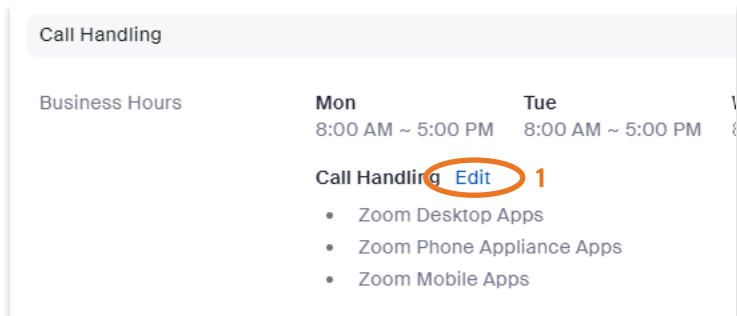


Call Handling List

Take a look at the devices listed under **“Call Handling”**. These are the devices that will ring when you receive a call in Zoom Phone.

To make changes:

1. Click on **“Edit”**.
2. Click on the individual toggles to turn them on and off.



Simultaneous Mode

Simultaneous Mode will allow all devices selected in the previous section to ring at the same time. You can set the max wait time to ring between 10 and 60 seconds. After the max wait time has elapsed, the call will be handled as defined in the next section.

Call Handling Ring Mode
Simultaneous

Max Wait Time
30 seconds

Sequential Mode

Sequential mode will send the call to each device in the Call Handling list above for a specified amount of time before moving the call to the next device in the list.

Call Handling Ring Mode
Sequential

Ringling Duration for Each Device
30 seconds

1. Change the “**Call Handling Ring Mode**” drop down to “**Sequential**”.
2. Click “**Confirm**”.
3. Set the “**Ringling Duration for Each Device**” to the number of seconds you would like each device to ring before rolling it to the next device in the list.
4. To change the order of the devices, you can go back up to the “**Call Handling list**” and select “**Edit**”.
5. To modify the list, click and drag the dots on the left or use the arrows to move devices up and down.
6. Click “**Close**”.

Call Handling **Edit** 4

1. Zoom Desktop Apps
2. Zoom Phone Appliance Apps
3. Zoom Mobile Apps

Call Handling Ring Mode
Sequential 1

Ringling Duration for Each Device
30 seconds 3

Call Handling for Business Hours

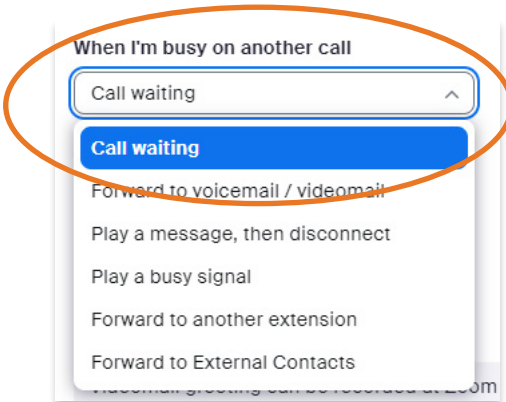
5 (Option 2)

5 (Option 1)

6 Close

When I'm Busy on Another Call

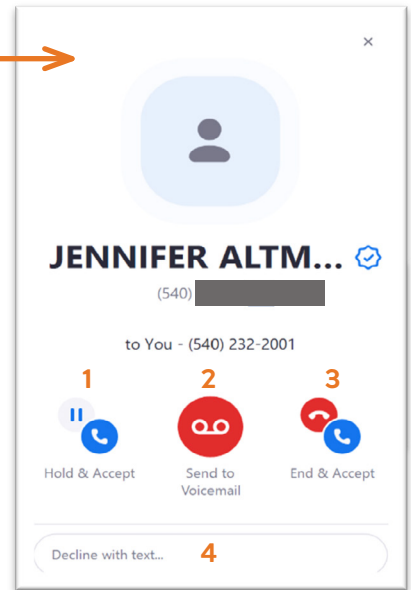
Here you can set your calls to give you the traditional call waiting notification with the opportunity to answer or you can pick from a variety of other options.



Here is what you see with Call waiting.

With one click you can do the following:

1. Place the current call on hold and accept the new call.
2. Send the new call to voicemail.
3. End the current call and accept the new call.
4. Decline the call with a text message.

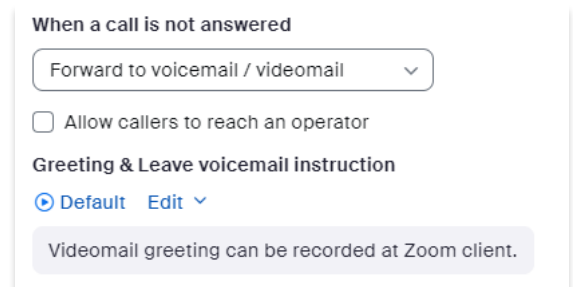


When a Call is Not Answered

You also have many similar options for when you do not answer a call.

The traditional options is to forward the call to voicemail. When a caller leaves a voicemail, you will get a notification in the Zoom app (both desktop and mobile versions).

You can use the app to listen to the message or read the transcription.

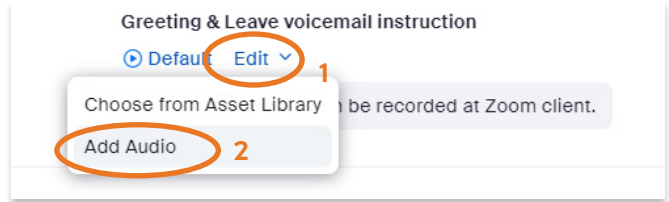


Setting Up Voicemail

The default voicemail message is “We are sorry, there is no one available to take your call”.

To customize the message:

1. Click “**Edit**”.
2. Click “**Add Audio**”.

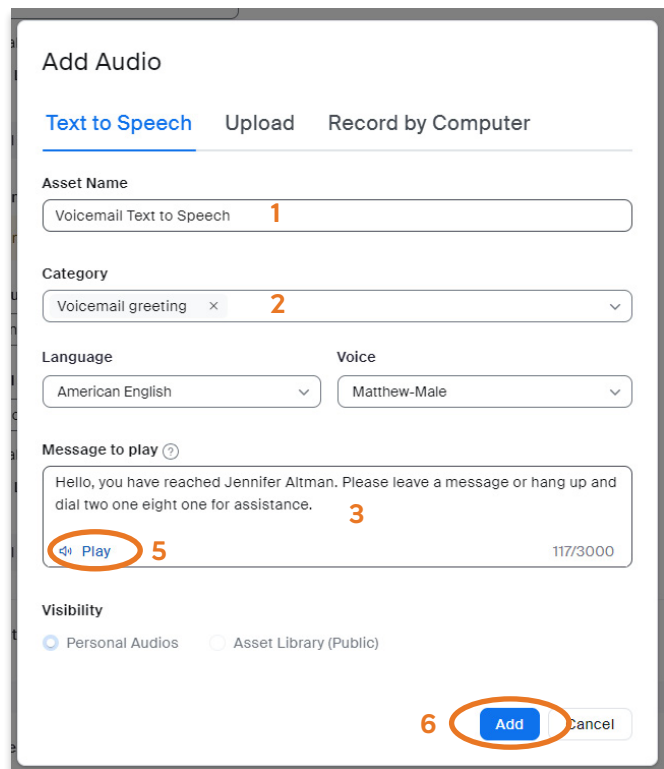


To setup a Text to Speech Greeting:

1. Give the voicemail message a name to help you identify it.
2. Select “**Voicemail greeting**” for the category
3. Type the message you want to computer voice to read.

Tip: Sometimes you can get the voice to do a better job at pronunciations by spelling things out phonetically.

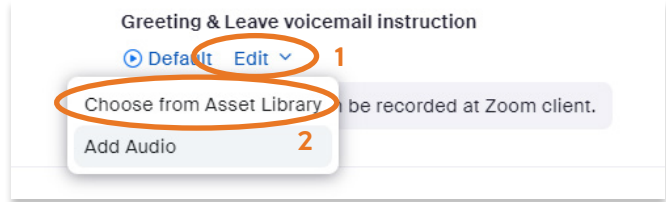
4. Select the voice you want to read your message.
5. Press “**Play**” (located in the bottom of the message text box) to hear how your message will sound.
6. Click “**Add**”.



Editing Your Voicemail Greeting

If you have already created a greeting and would like to make an change:

1. Click **“Edit”**.
2. Click **“Choose from Asset Library”**.
3. Click on the 3 dots on the right hand side of the row for the recording you wish to edit.
4. Then select **“Edit”**.



Select an audio

Search by asset and uploader name

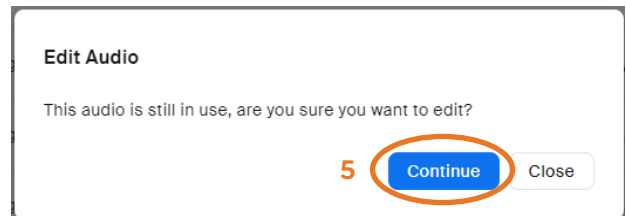
Language (All) Category (All)

Name	Language	Category	Uploader	Upload Time	
<input type="radio"/> IVR Greeting	American English	IVR audio prompt	Jennifer Altman	Apr 29, 2024, 9:01 AM	3 ...
<input type="radio"/> BAMS Initial Greeting	American English	CQ/AR greeting prompt	Jennifer Altman	Mar 13, 2024, 1:43 PM	4 Edit
<input type="radio"/> BAMS Emergency VM	American English	Voicemail greeting	Jennifer Altman	Apr 25, 2024, 12:16 PM	Delete
<input type="radio"/> BAMS After Hours	American English	IVR audio prompt	Jennifer Altman	Apr 25, 2024, 11:13 AM	...
<input type="radio"/> Jennifer After Hours	American English	Voicemail greeting	Jennifer Altman	Mar 27, 2024, 9:29 AM	...
<input type="radio"/> Jennifer VM Greeting	American English	Voicemail greeting	Jennifer Altman	Feb 1, 2024, 3:45 PM	...

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Save Cancel

5. If the greeting is currently in use, you will see a warning box. Click **“Continue”**.
6. You will then be shown a box nearly identical to the **“Add Audio”** box and can continue to make your changes.
7. Click **“Save”**.



Allow Callers to Reach an Operator

In this section , there is also a check box to allow callers to reach an operator.

To configure this option:

1. Check the “**Allow callers to reach an operator**” box.
2. Under “**Connect to Operator**”, select the type of line you are transferring the call to.
3. Use the search box to select a number to send the call to.
4. Check the last box only if you wish for the caller to be sent to your voicemail if the ‘Operator’ doesn’t answer.
5. Click “**Save**”.
6. You now have the option to create your own greeting for this option or use the default.
7. Click “**Edit**” to create your own message, but remember to include the numbers that use will need to press for each option.

When a call is not answered

Forward to voicemail / videomail

Allow callers to reach an operator 1

IVR Menu

0 Forward to an operator:

1 Leave voicemail to: Current Extension

Connect to Operator

User 2

Search by Name, Email, or Ext. 3

Play callee's voicemail greeting when caller reaches end of forwarding sequence

Closed Hours

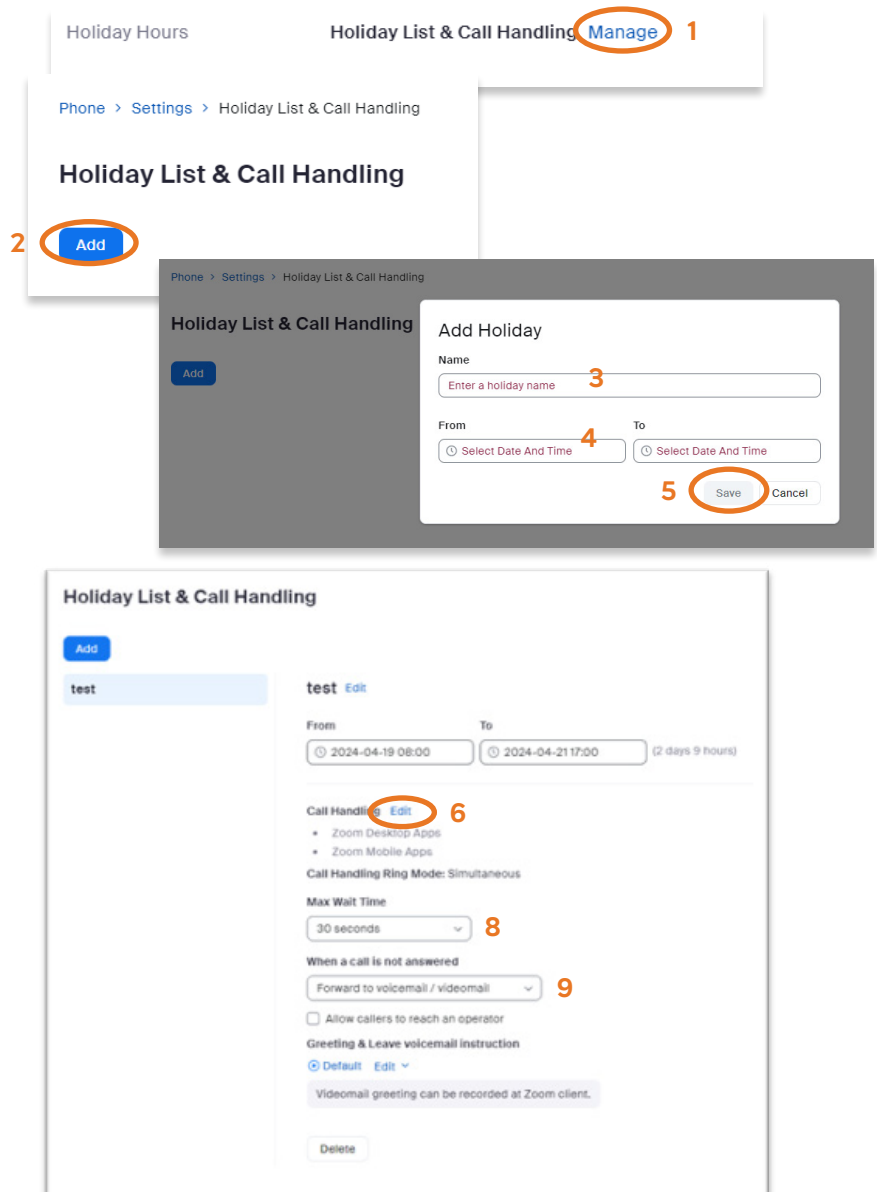
If you changed your Business Hours from 24/7 to Custom in the previous section, you now have the opportunity to define what happens when you are not available. You can use all of the same instructions above to configure different options for off hours.

Holiday Hours

You can configure special options and greetings for holidays, winter break and vacations.

To setup a holiday:

1. Click **“Manage”**.
2. Click the blue **“Add”** button.
3. Enter a holiday name.
4. Select the dates.
5. Click **“Save”**.
6. Under **“Call Handling”**, click **“Edit”**.
7. Turn on the toggles for the devices you wish to use to answer calls (if any).
8. Set the **“Max. Wait Time”**.
9. Configure what to do if a call is not answered.
 - a. You can configure additional voicemail greetings here or use on that you have already created.

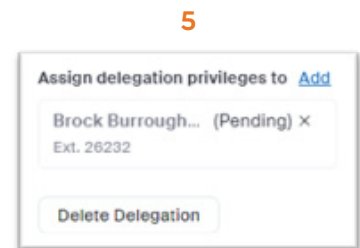
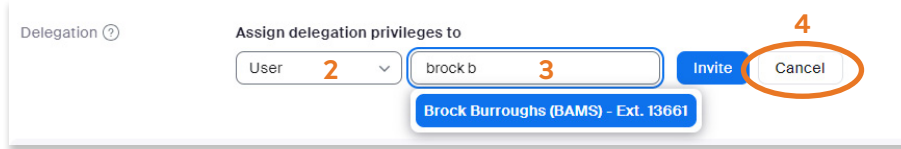
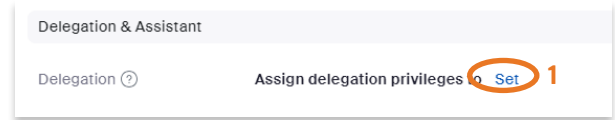


Delegation & Assistant

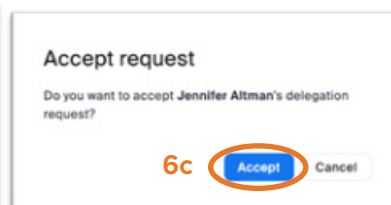
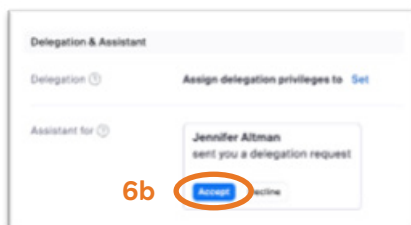
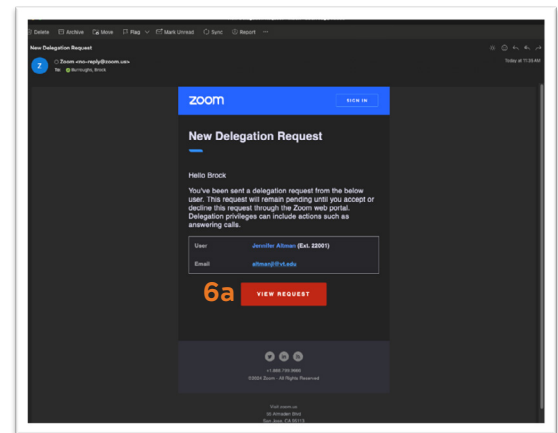
This section allows you to configure other Users or Common Area Phone lines that can answer calls to your individual number.

To set a Delegate:

1. Scroll to the “**Delegation & Assistant**” section and click on “**Set**”.
2. Select whether the delegate is a “**User**” or “**Common Area Phone**”.
3. Use the search box to search for the phone by name or by number.
4. Click “**Invite**”.
5. You can come back to this section to delete a delegate at any time.



6. The delegate will be sent an email invitation that they will need to accept.
To do this, they will need to:
 - a. Click “**View Request**” button in the email, which will redirect them to the Zoom website
 - b. They will need to scroll down to the Delegates section and click “**Accept**”.
 - c. Click “**Accept**” on the confirmation box.



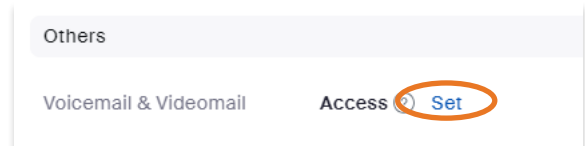
Others

This section has a few additional items that may be of interest to some employees.

Voicemail and Videomail

You can grant other Zoom Users or Common Area phone lines access to your voicemail.

To set this up, click the blue **“Set”** link next to access and search for those that you want to grant access and click **“Save”**. Use the new **“Add link”** to add more.



Block List

The new system allows individual employees to manage their own blocked numbers list.

To add a number, click on the **“Manage Block List”** link. Use the **“Add”** link under the **“Blocked Numbers”** section to add blocked numbers.

