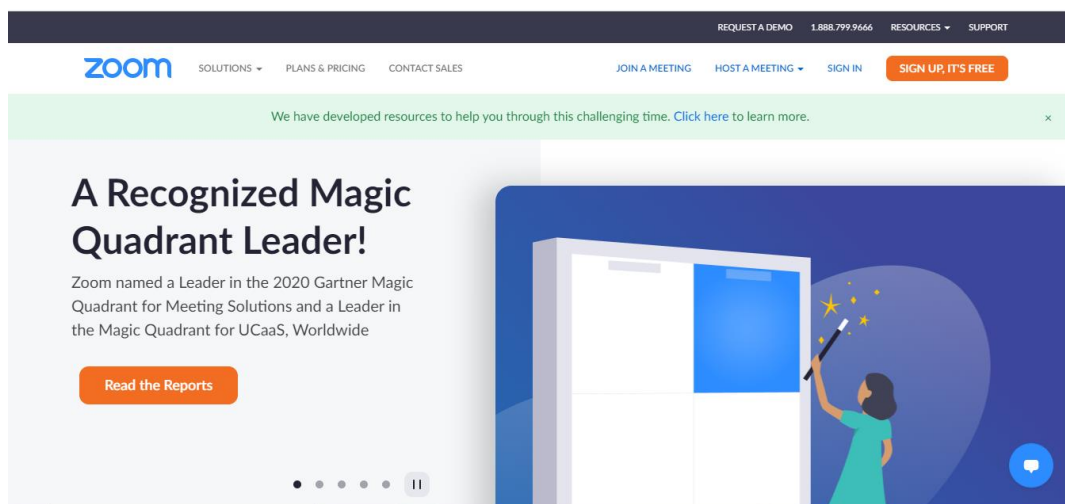
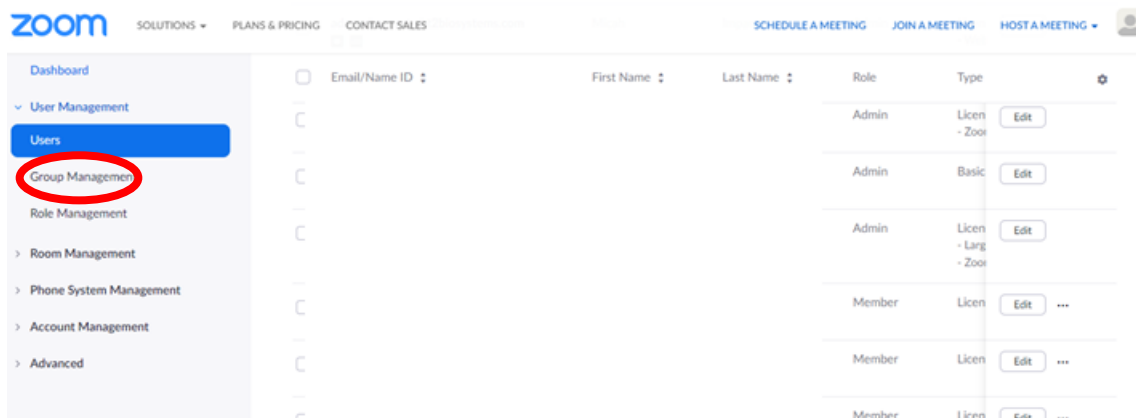


How to Assign a Softphone License for Zoom Desktop Client:

1. Go to <https://zoom.us/> and login to the portal.



2. Scroll down and click on User Management, then **Users**.

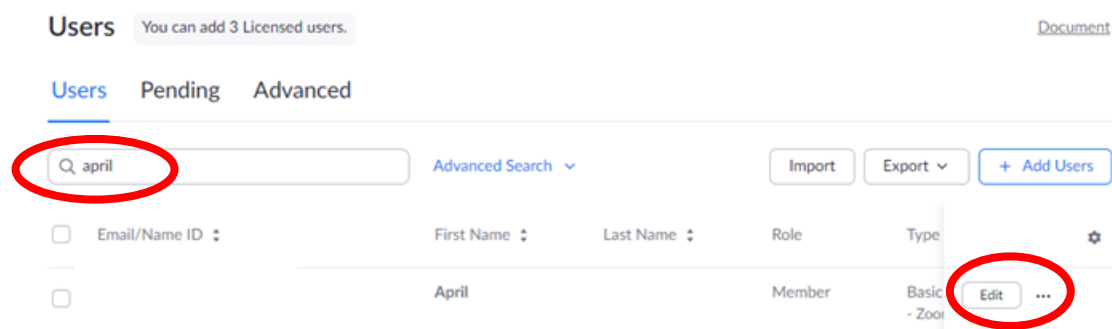


3. Type the first name of the user you wish to add the Zoom softphone too.



The screenshot shows the 'Users' management page. At the top, it says 'Users' and 'You can add 2 Licensed users.' There are tabs for 'Users', 'Pending', and 'Advanced'. A search bar with a magnifying glass icon and the text 'Search' is circled in red. To the right of the search bar is a dropdown menu labeled 'Advanced Search'. Further right are buttons for 'Import', 'Export', and '+ Add Users'. Below the search bar is a table with columns: 'Email/Name ID', 'First Name', 'Last Name', 'Role', 'Type', and a settings gear icon. The table contains one entry with 'Owner' in the Role column and 'Licen - Web - Larg - Zoon' in the Type column. An 'Edit' button is visible next to the Type column.

4. Click on the edit button of the users name you just typed. This is right next to button with three dots.



The screenshot shows the 'Users' management page after a search. The search bar now contains the text 'april' and is circled in red. The table below shows one entry with 'April' in the First Name column, 'Member' in the Role column, and 'Basic - Zoon' in the Type column. The 'Edit' button and a three-dot menu icon are circled in red next to the Type column.

5. Click on **Licensed** to change from Basic to Licensed type of softphone. You will also see the option for selecting Large Meetings and Webinar capabilities for the user. Click **Save**.

Edit User

Emails

User Type 

Basic Licensed On-Prem 

Meeting Basic and Zoom Phone Basic

User Role

Member

Department

e.g. Product

Job Title

e.g. Product Manager

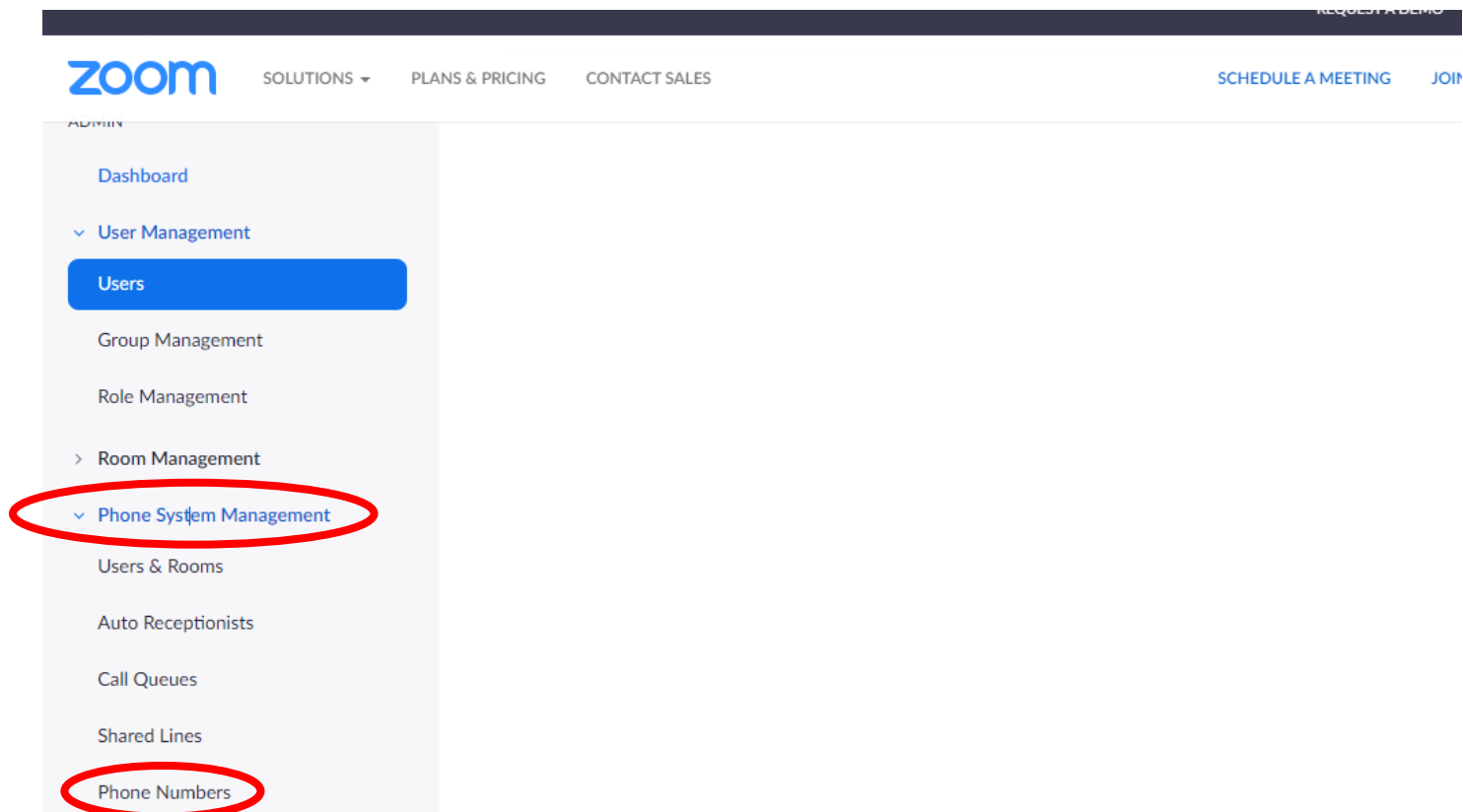
Location

e.g. San Jose

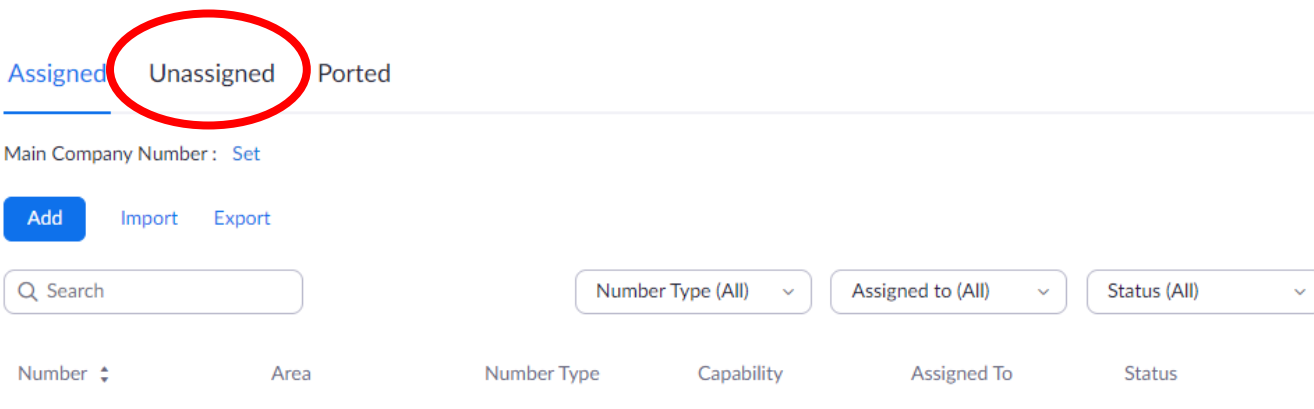
Save

Cancel

6. Now click on **Phone System Management** on the left. Then click on phone **Numbers**.

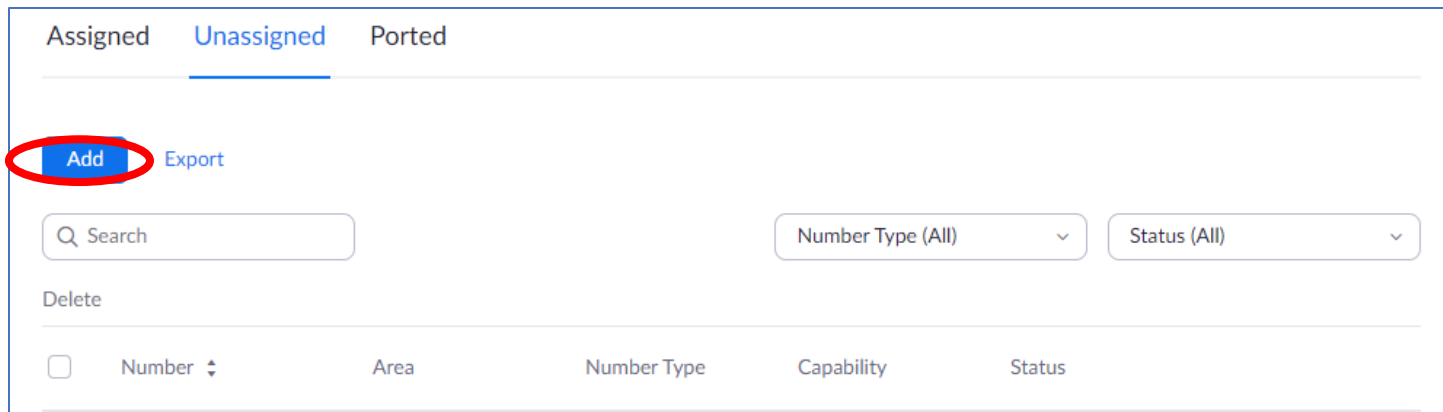


7. Click on Unassigned.



The screenshot shows the CTSBoston interface with three tabs: 'Assigned', 'Unassigned', and 'Ported'. The 'Unassigned' tab is selected and circled in red. Below the tabs, there is a 'Main Company Number : Set' label. A row of buttons includes 'Add', 'Import', and 'Export'. A search bar with a magnifying glass icon and the text 'Search' is present. To the right of the search bar are three dropdown menus: 'Number Type (All)', 'Assigned to (All)', and 'Status (All)'. Below these elements is a table header with columns: 'Number', 'Area', 'Number Type', 'Capability', 'Assigned To', and 'Status'.

8. Scroll down to see the full list of available telephone numbers. Once you see a telephone number you would like to assign to a user you can click on **Assign to** on the right-hand side of the page.




This screenshot is a zoomed-in view of the interface, focusing on the 'Unassigned' tab. The 'Add' button is circled in red. Below the 'Add' button is the 'Export' button. The search bar and dropdown menus are also visible. Below the search bar is a 'Delete' label. The table header is partially visible, showing columns for 'Number', 'Area', 'Number Type', 'Capability', and 'Status'.

9. Click on **Assign to User** which can be already populated for you and then click on **Enter Ext. or Name**.

Assign Number

Number

Assign to

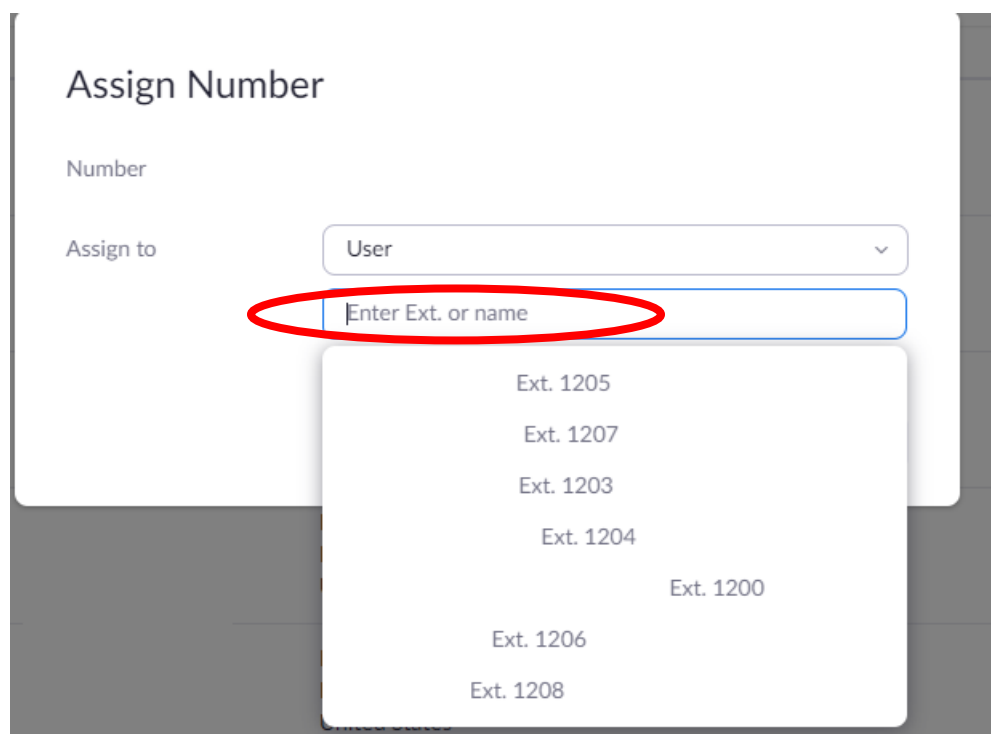
User 

Enter Ext. or name

Cancel

OK

10. You will now be able to click on the name of the user you wish to assign the telephone number you selected in step 8.



Assign Number

Number

Assign to

- Ext. 1205
- Ext. 1207
- Ext. 1203
- Ext. 1204
- Ext. 1200
- Ext. 1206
- Ext. 1208

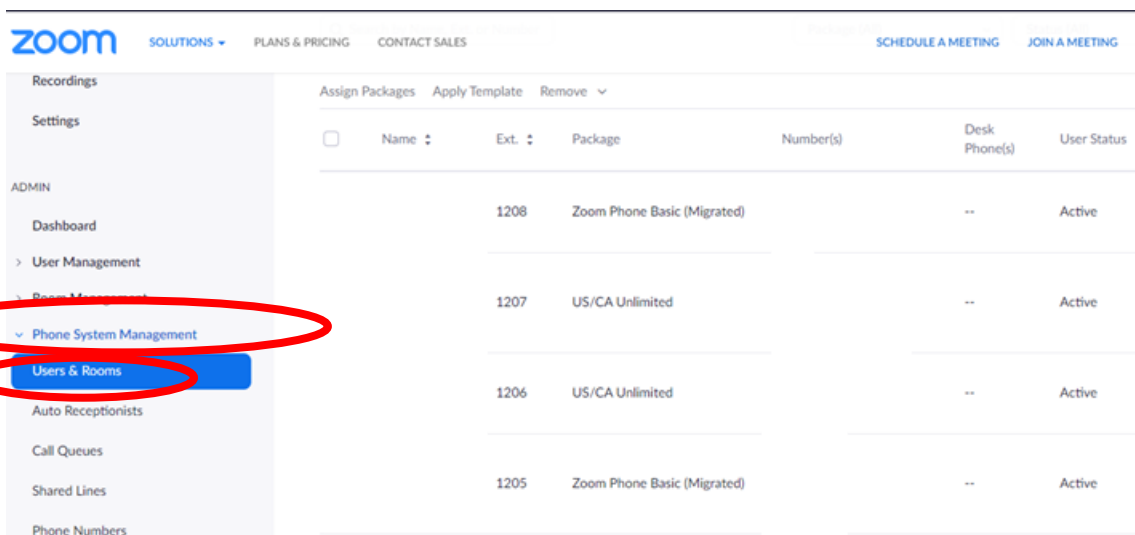
11. Click **OK** when you are done selecting the user.

Assign Number

Number

Assign to

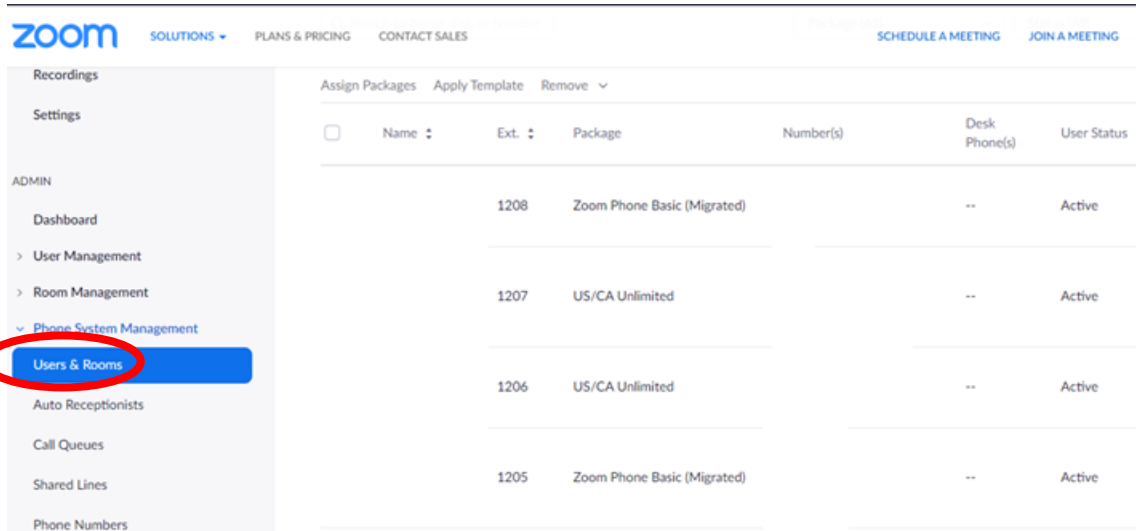
12. Now click on **Phone System Management** on the left. Then click on **Users & Rooms**.



The image shows the Zoom Admin interface. On the left sidebar, 'Phone System Management' and 'Users & Rooms' are circled in red. The main content area displays a table of phone numbers and their associated packages.

<input type="checkbox"/>	Name	Ext.	Package	Number(s)	Desk Phone(s)	User Status
		1208	Zoom Phone Basic (Migrated)		--	Active
		1207	US/CA Unlimited		--	Active
		1206	US/CA Unlimited		--	Active
		1205	Zoom Phone Basic (Migrated)		--	Active

13. Click on the user that you assigned the phone number to in step 10 next to package.



zoom SOLUTIONS ▾ PLANS & PRICING CONTACT SALES SCHEDULE A MEETING JOIN A MEETING

Recordings Settings ADMIN

Dashboard > User Management > Room Management > Phone System Management

Users & Rooms Auto Receptionists Call Queues Shared Lines Phone Numbers

Assign Packages Apply Template Remove ▾

<input type="checkbox"/>	Name ↕	Ext. ↕	Package	Number(s)	Desk Phone(s)	User Status
		1208	Zoom Phone Basic (Migrated)		--	Active
		1207	US/CA Unlimited		--	Active
		1206	US/CA Unlimited		--	Active
		1205	Zoom Phone Basic (Migrated)		--	Active

14. Click on **Assign**.

Users & Rooms > Users >


[Profile](#) [Policy](#) [History](#) [User Settings](#)

Package Zoom Phone Basic (Migrated) ⓘ
[Assign](#)

Extension Number 1208

15. Click on **Select Package**.

[Profile](#) [Policy](#) [History](#) [User Settings](#)

Package 

Extension Number 1208 [Edit](#)

16. Click on US/CA Unlimited Calling Plan and hit **Save**.

[Profile](#) [Policy](#) [History](#) [User Settings](#)

Package

Select Package

US/CA Unlimited Calling Plan (22 Available)
Pro Features • Unlimited Domestic

Extension Number

1208 [Edit](#)

17. This completes the License Assignment process. You may now use the Zoom Softphone on the Zoom Client on a PC or Mobile device.