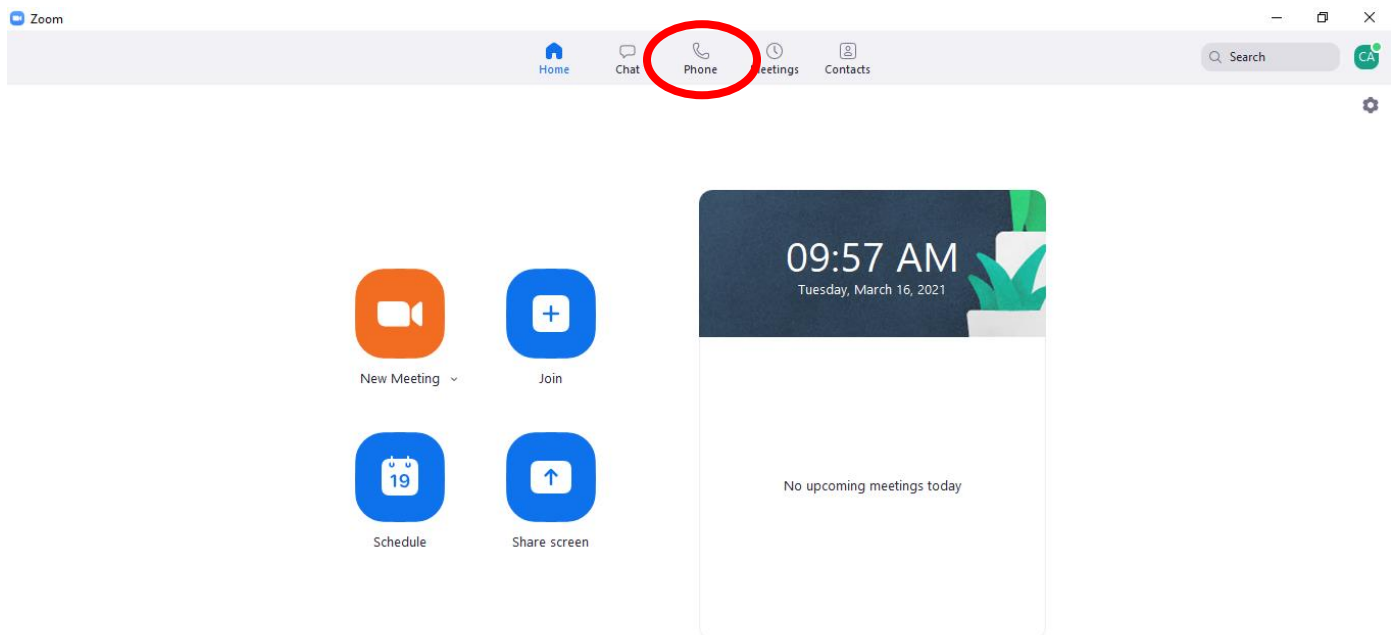# How to Use the Zoom Softphone:

1. Click on the **Zoom Camera Icon** wherever you have Zoom Client installed**.** This will bring up the Zoom Client that you are familiar with and will now have the softphone feature and allow you to make and receive calls. Click on the **telephone icon** to get started.

2. This will bring you to the main softphone page. See the **Caller ID** at the bottom of screen.

3.   The caller ID at the bottom of the number pad is the phone number you are dialing out from. This is the same number that was assigned to you in the Zoom admin portal. This is where you will hide your caller ID if need be. You can use the number pad to dial out any number.   Place a call after typing in a ten digit number by pressing the **blue phone** icon. The number will appear above the number pad.   See example 5555555555.
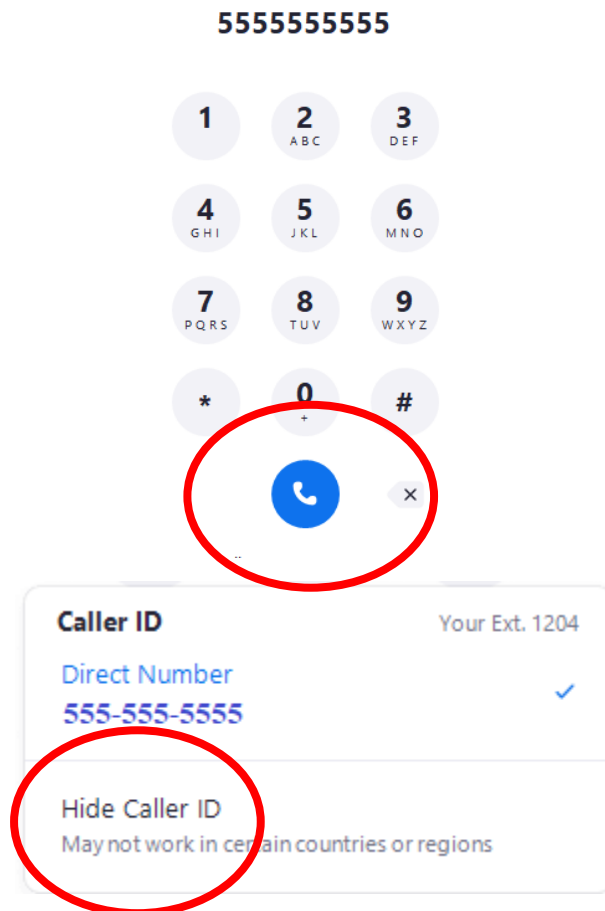
4.   You will see the app is calling the number you entered in step 3. The screen you see will have a red phone icon. Press the **red phone icon** when you are finished speaking to end the call.

Calling ...

Mute   Keypad   Audio

Add Call   Hold   Transfer

Record   Meet   More
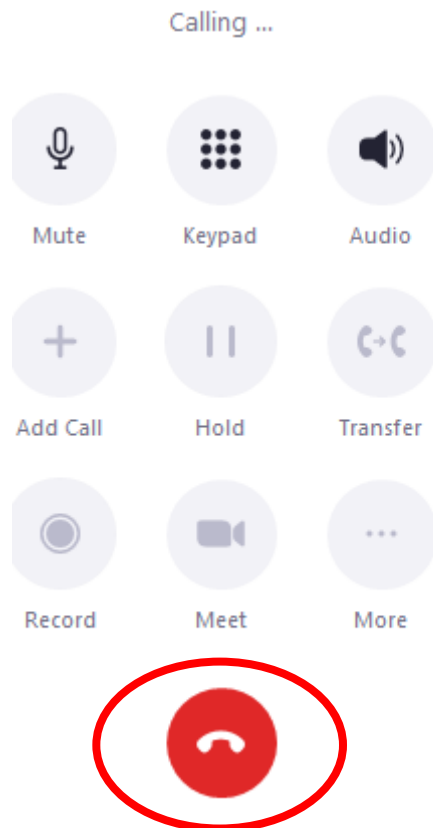
5. There are 9 buttons on the number pad to chose from when placing or receiving a call. Notice how they turn from grey to black when on call. This means they are now available to use. Press the top right button that has a microphone with a line through it to **mute** yourself on a call. Press it again to **Unmute** yourself. Notice how the line disappears and vice versa.

00:22
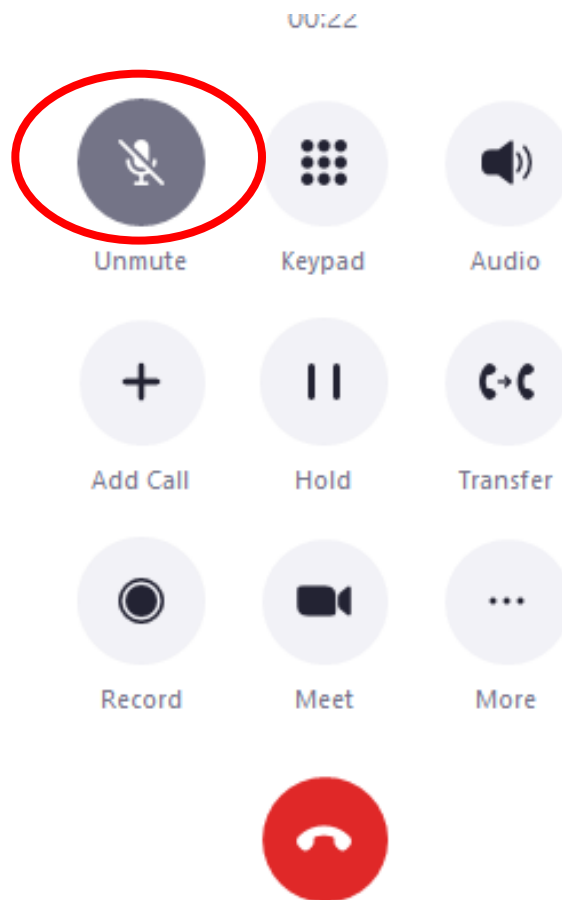
6. While you are on a call and you need to add another call press the **Add Call** + sign. Type in the number and press the Blue Phone Icon. The number will now be called. Once the third party answers you hit the arror pointing up next to the phone number you just dialed to merge the two calls.
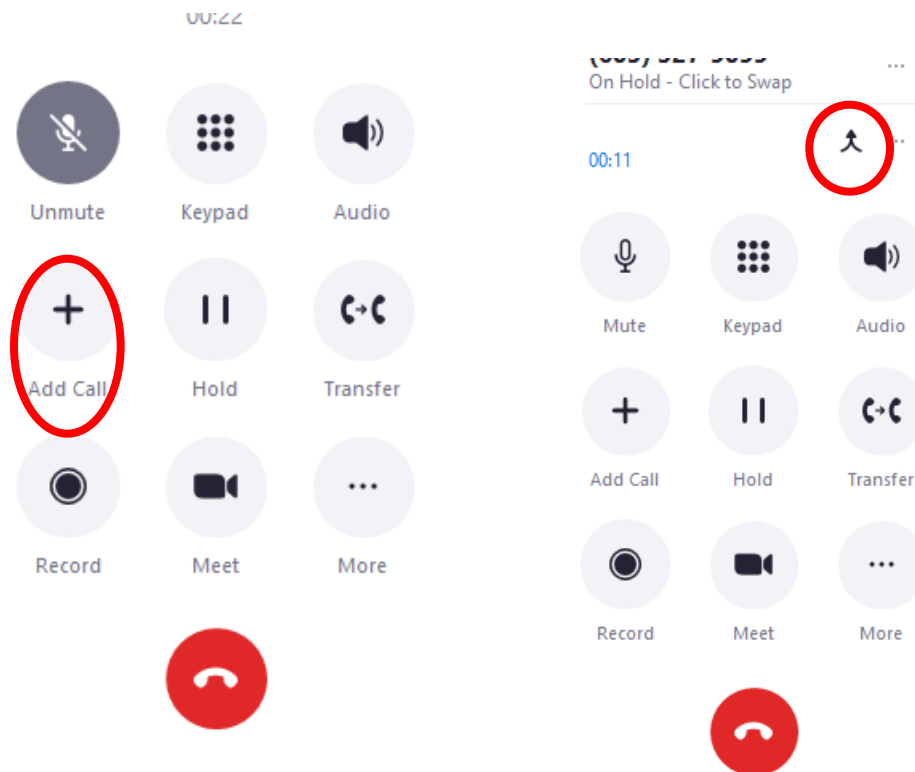
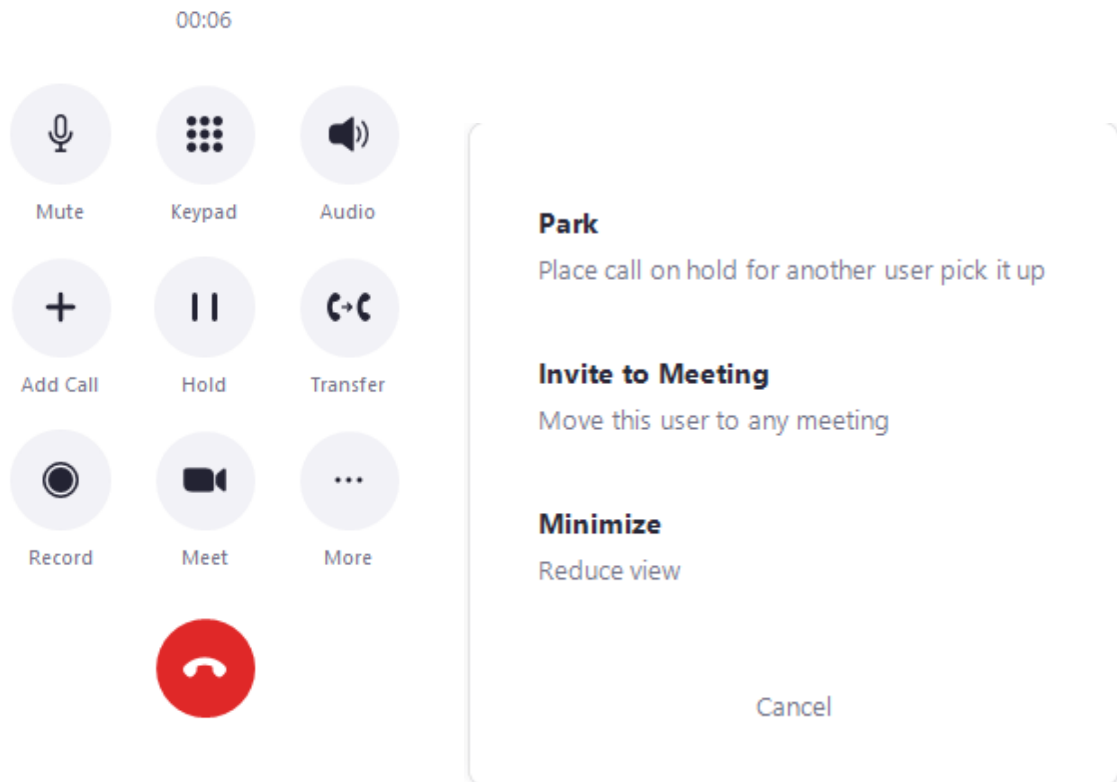7. Please be aware that you cannot merge more than two calls at any one time. If you attempt to add a fourth caller to the conference call it will be treated as a separate call. Click on **Click to Swap** to switch between the conference call and the fourth call.

701-555-5555 & (97... ...
02:32

601-555-5555 ...
On Hold - Click to Swap

Unmute   Keypad   Audio

Add Call   Hold   Transfer

Record   Meet   More
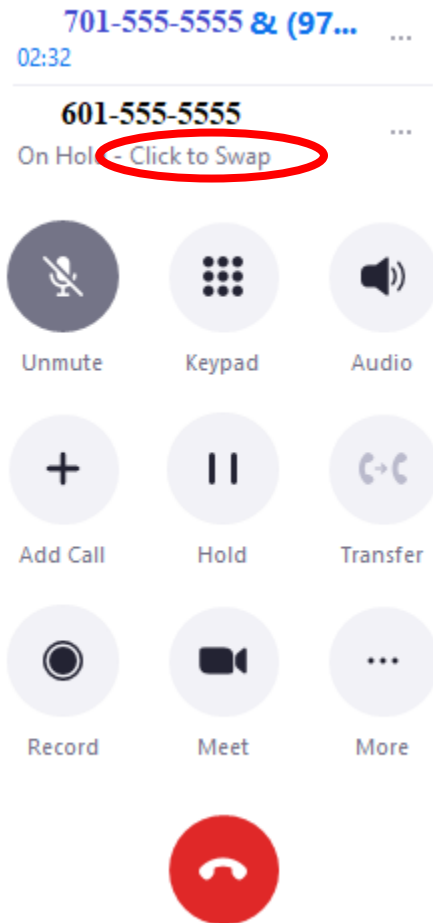
8.   The Audio, Hold, Transfer, Meet and Record buttons will all perform the name of the actions when you press them.   The final **More** button is used to **Park** a call, **Invite the called party to a meeting** and **Minimize** the view of the call. Please note if you press the record button while on call it will store a copy of the phone conversation in the history tab and directory listed under settings. The record button will alert everyone on the call that the call is being recorded. You can even download the recording from the **history** tab. Press **cancel** to return to the original dial pad.

00:06

Mute   Keypad   Audio

Add Call   Hold   Transfer

Record   Meet   More

Park
Place call on hold for another user pick it up

Invite to Meeting
Move this user to any meeting

Minimize
Reduce view

Cancel

History   Voicemail   Lines

All History ⌄

Phone Recording

↳ **O Neal Ryan**   Today
12:42 PM

▶ 00:29

↳ **Boston**   Today
12:28 PM

↳ **Boston**   Today
12:27 PM

Under **Settings:**

Local Recording

Store my recording at: C:\Users\oneal\OneDrive\Docun   [Open]   [Change]

173 GB remaining.

9. Take a look at the rop right hand side of the Zoom Client. When you click on the abbreviation of your name and the green dot you will notice a new pop-up screen appears with certain options. Clicking on **Settings** will bring you to a new screen and this is where you can make changes to the appearance of the Zoom phone, or change audio/video settings. See two screenshots below.

Screenshot of **Settings:**

Settings ☐ General

- ☐ Start Zoom when I start Windows
- ☑ When closed, minimize window to the notification area instead of the task bar
- ☐ Use dual monitors ⑦
- ☐ Enter full screen automatically when starting or joining a meeting
- ☐ Automatically copy invite link once the meeting starts
- ☑ Always show meeting controls ⑦
- ☑ Ask me to confirm when I leave a meeting
- ☐ Show my connected time
- ☑ Remind me [5 ▾] minutes before my upcoming meetings
- ☐ Stop my video and audio when my display is off or screen saver begins
- ☑ Integrate Zoom with Outlook ⑦

Reaction Skin Tone

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View More Settings ⬈

Sidebar menu:
- ☐ General
- Video
- Audio
- Share Screen
- Phone
- Chat
- Background & Filters
- Recording
- Profile
- Statistics
- Feedback
- Keyboard Shortcuts
- Accessibility

10. If you wish to have all calls go straight to voicemail you can put yourself in **Do Not Disturb** status by clicking on it. You even have the option to set a specific time period for that status. Putting yourself in **Available** status will allow you to receive calls again. Putting yourself in **Away** status will show you are away from your desk and might not be reachable for the time you are away.
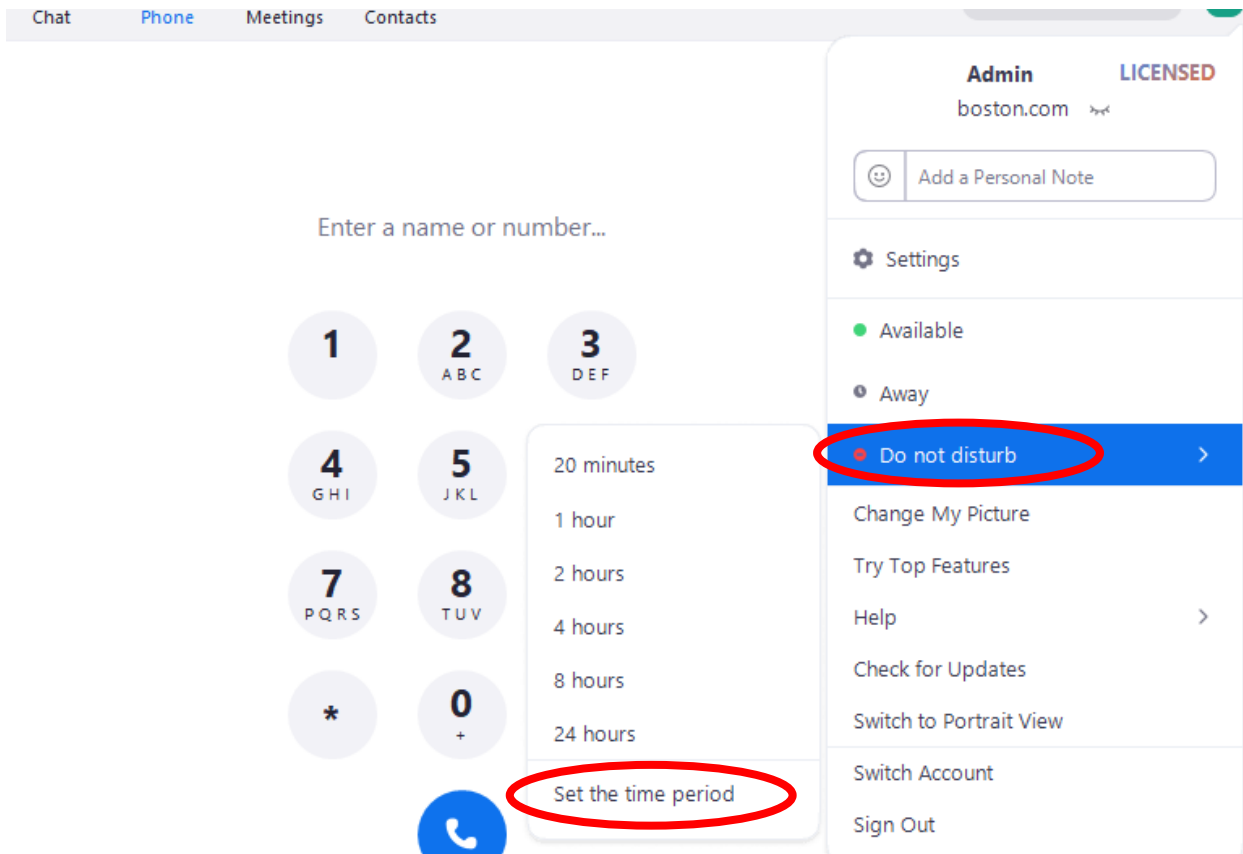
11. To look up call records, or other details in the web portal you must first click on **Settings** and then click on **Profile** and click on **View Advance Features.** You will be taken directly to the Zoom Portal in a web browser.
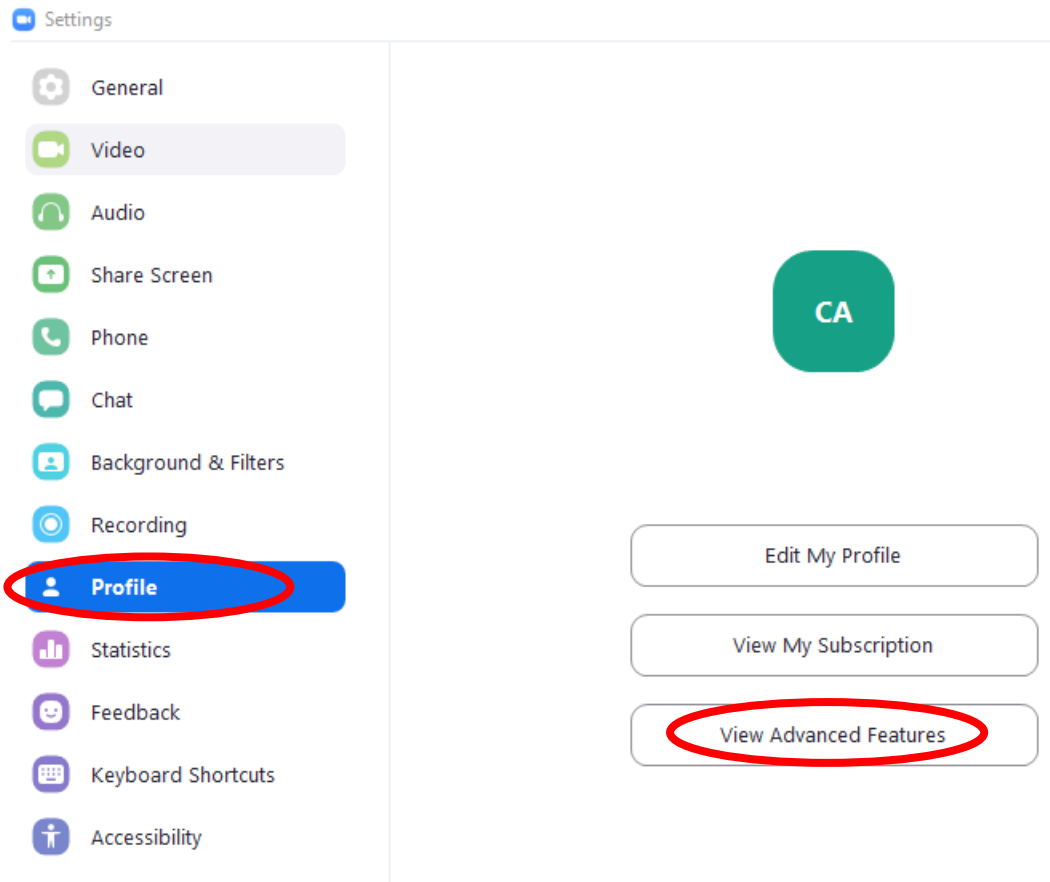
12. To see voicemails in the portal go to **Phone** on the left hand side and then click on the **Voicemails** tab. Click on **History** to view call records, and click on **Recordings** to view the recordings of phone calls like in step 8.

13. To set up call forwarding, or to set up any other call settings like business hours, max wait time, or set up a voicemail greeting you will click on settings in the upper right hand corner of the portal.

Here are some useful web links for your knowledge:

The App Store has lots of screenshots, reviews, and other details about the Zoom App for Apple Phone products.   The URL for that page is:

https://apps.apple.com/us/app/id546505307

The Android Store has screenshots, reviews, and other details about the Zoom App for Android Phone products.   The URL for that page is:

https://play.google.com/store/apps/details?id=us.zoom.videomeetings