

## **Zoom Phone Reference Guide**

In this guide, there are step by step instructions on how to make a call, transfer a call, elevate a call to a meeting, send/receive an SMS, check your voicemail, and set up a voicemail greeting.

### **How to Make a Call**

- Open the Zoom app/client.
- Click the Phone tab.
- Type in a name, number, or extension, and click the blue phone icon.

### **How to Transfer a Call**

- While on a call, click the Transfer button.
- Enter the name or number of the person to transfer to.
- Click the blue transfer button.
- Select the transfer method and the call will be transferred accordingly.
  - Warm Transfer: Speak to the new agent before transferring.
  - Blind Transfer: Transfer without speaking to the new agent.
  - Transfer to Voicemail: Transfer directly to the new agent's voicemail

### **How to Elevate a Call to a Meeting**

- When in a phone call, click the Meet button.
- The call will be transferred to an instant Zoom Meeting.

### **Send/Receive an SMS**

- Open the Zoom app/client.
- Go to the Phone tab.
- Click SMS and select the Create New Message option.
- Enter the name or number in the To: section.
- Type your message in the Text Message field and click Enter to send the message.

### **How to Check your Voicemail**

- Open the Zoom app/client.
- Go to the Phone tab.
- Click Voicemail, hover over the voicemails, and click the Play icon to listen to the message and open the voicemail transcription.
- Or click the Phone icon to call the individual back or click ... to bring up more options.

### **How to Change your Voicemail Greeting**

- Sign in to zoom.us.
- Navigate to the Phone tab under Personal.
- Under Settings, locate the Call Handling section and click Audio Library.
- Click Add Audio.
- Choose Text to Speech, Record by Computer, or Upload a new file.