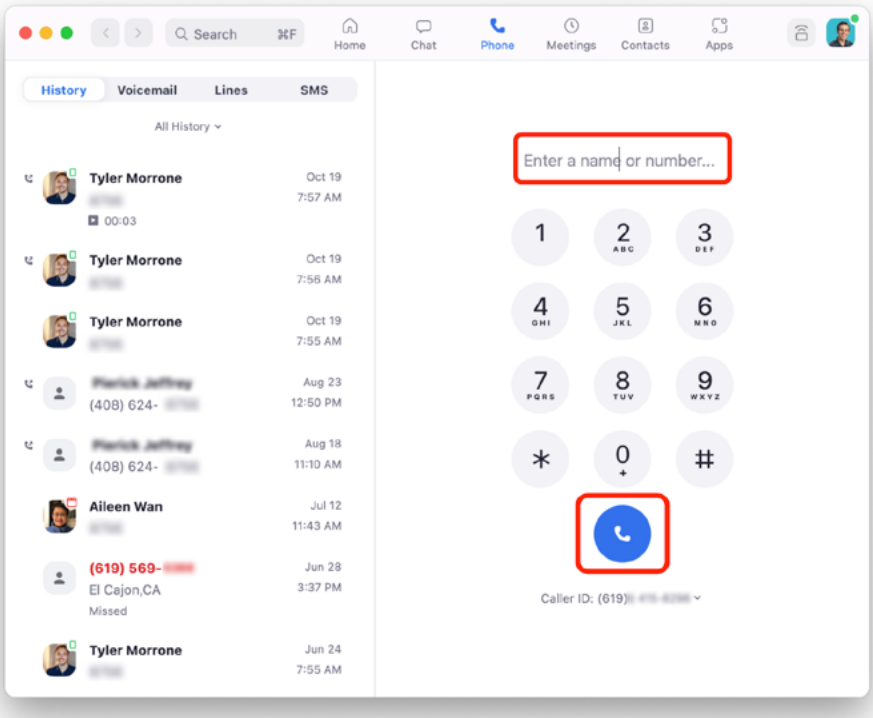
Zoom Phone

Quick Reference Guide

October 2021

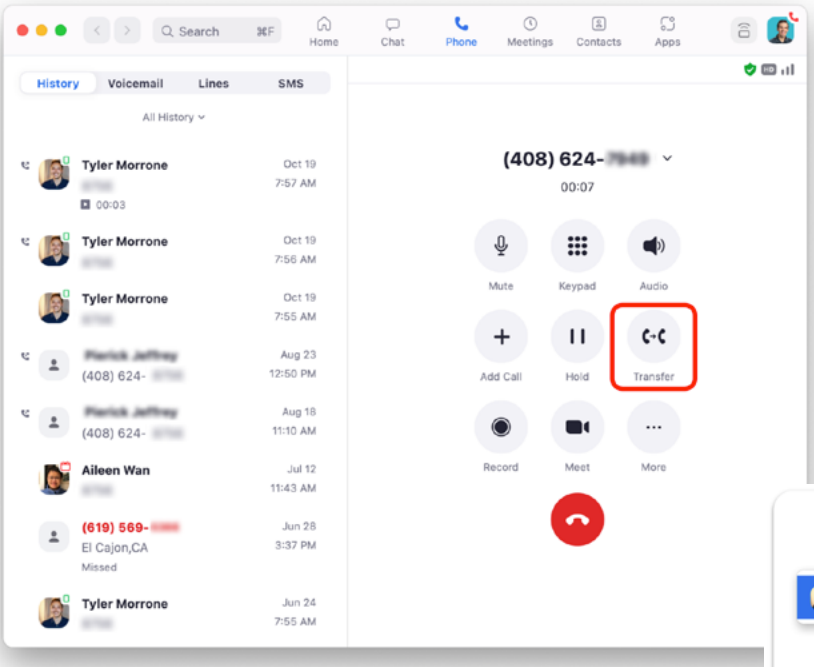
How to Make a Call

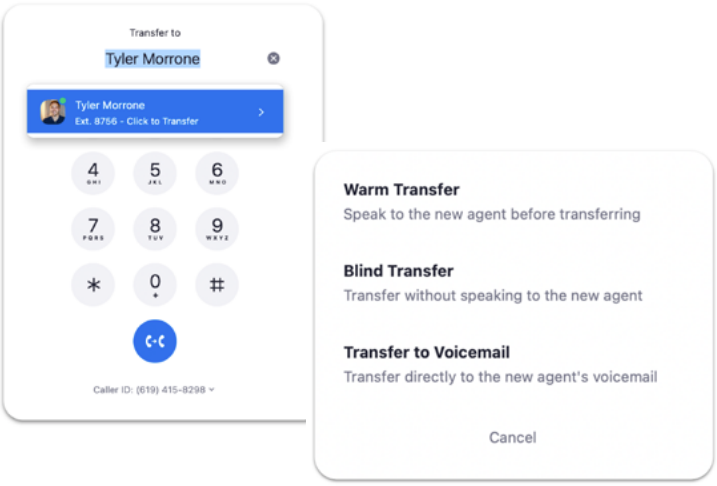
1. Open the **Zoom app/client**.
2. Click the **Phone** tab.
3. Type in a **name**, **number**, or **extension**, click the **blue phone** icon.



How to Transfer a Call

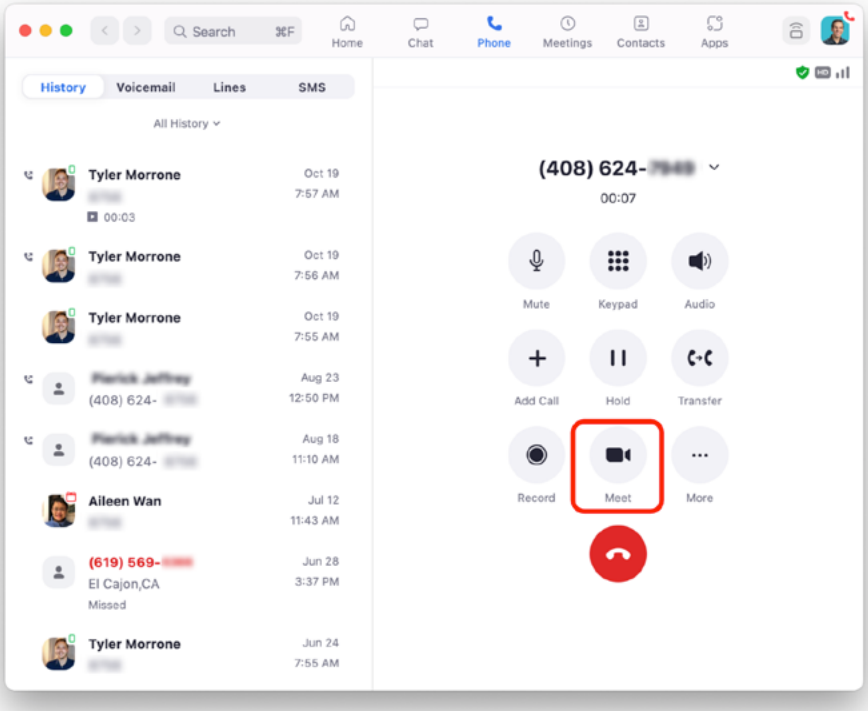
1. While on a call, click the **Transfer** button.
2. Enter the **name** or **number** of the person to transfer to.
3. Click the **blue** transfer button.
4. Select the **transfer method** and the call will be transferred accordingly.

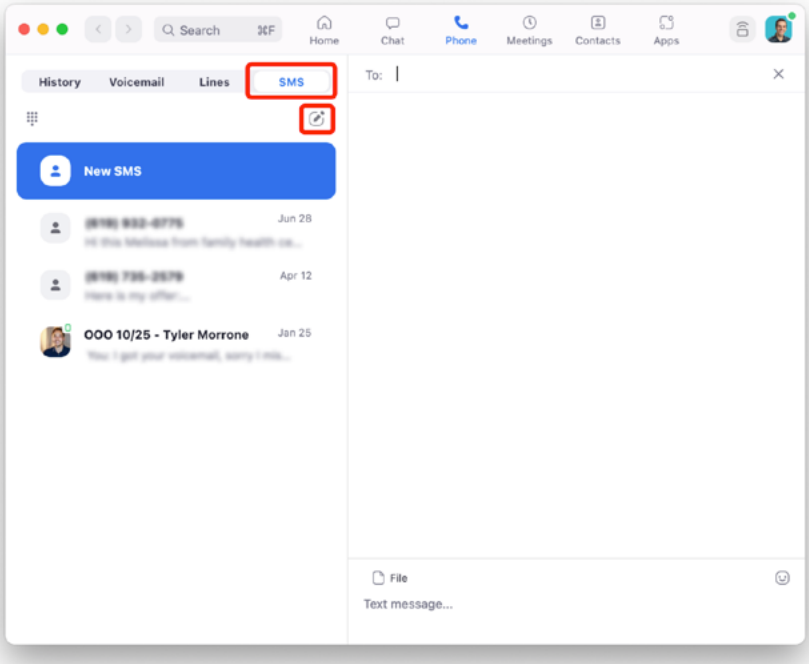




How to Elevate a Call to a Meeting

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



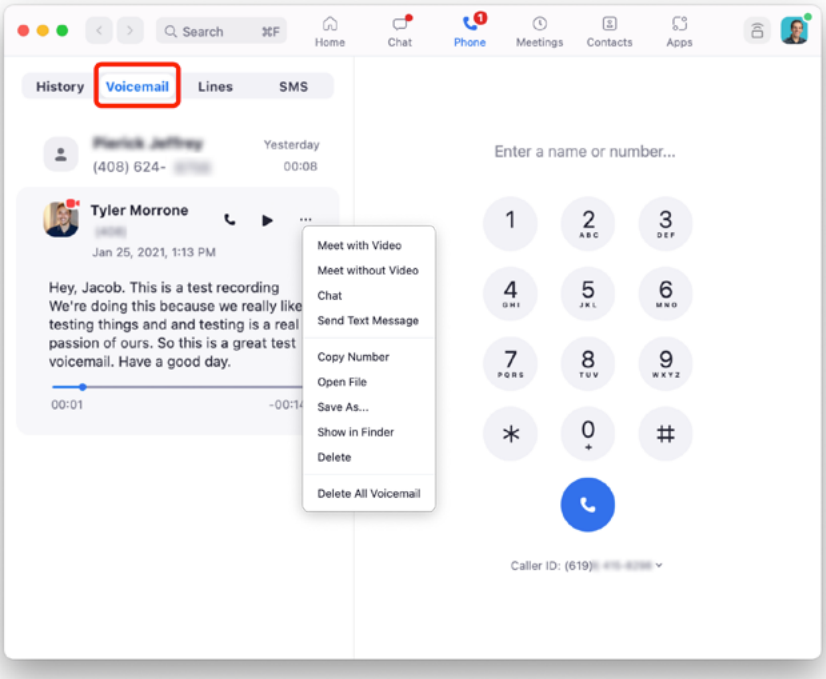


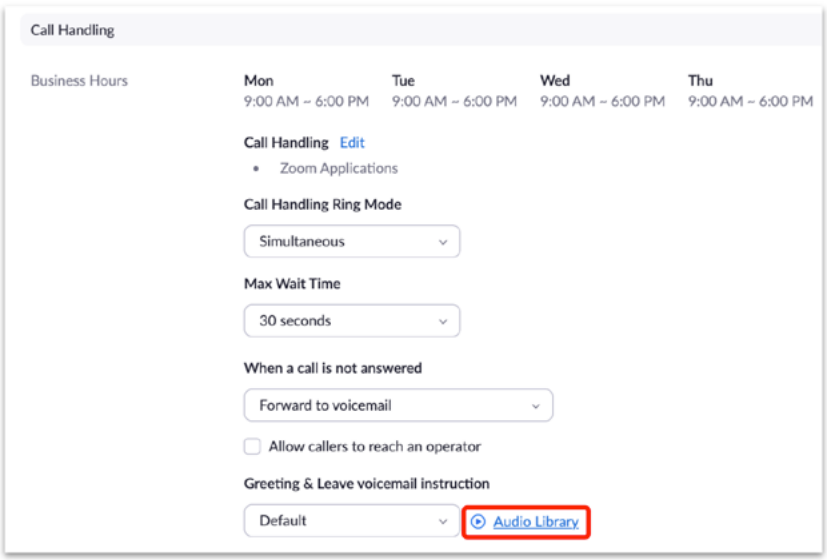
Send/Receive an SMS

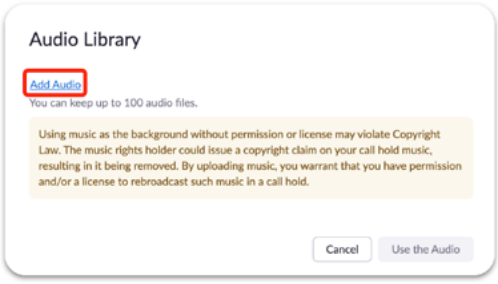
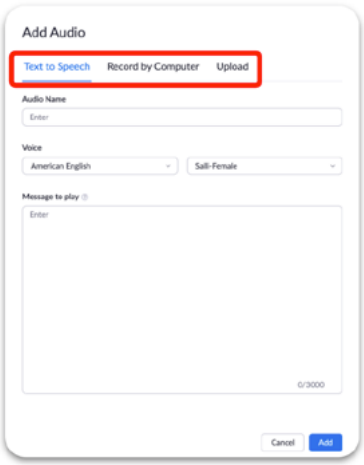
1. Open the **Zoom app/client**.
2. Go to the **Phone** tab.
3. Click **SMS** and select the **Create New Message** option.
4. Enter the **name** or **number** in the **To**: section.
5. Type your message in the **Text Message** field and click **Enter** to send the message.

How to Check your Voicemail

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





How to Change your Voicemail Greeting

1. Sign into **zoom.us**.
2. Navigate to the **Phone** tab under Personal.
3. Under settings locate the **Call Handling**, section and click **Audio Library**.
4. Click **Add Audio**.
5. You can pick if you want to use **Text to Speech**, **Record by Computer** or **Upload** a new file.