



Zoom Phone — Admin & Support Staff

Quick-Reference Guide — US/Canada Unlimited Calling Plan (Zoom Computer App & Desk Hardware)

This guide covers everyday operations using the Zoom Application on your computer and your physical desktop hardware. Because your license is tied to your district identity, you can manage calls seamlessly from either device.

⚠ EMERGENCY PROTOCOL (911)

Dial 911 directly from your app's dial pad or desk phone. No external access prefix (like 9) is required.

1. Daily Inbound Operations & Multi-Line Handling

Using the Zoom Computer App

- **Answering a Call:** When a call rings, a pop-up appears in the corner of your screen. Click the blue **Accept** button.
- **Handling a Second Incoming Call:** If you're already on a call and another comes in, click **Hold & Accept** on the pop-up notification. Your original caller is safely placed on hold.
- **Swapping Lines:** Open the **Lines** tab in the app to see all active calls. Click on a held call to instantly toggle back to it.

Using the Physical Desk Phone

- **Answering:** Lift the handset or press the **Speakerphone** button.
- **Handling a Second Call:** Press the flashing **Line Key** for the incoming call. The phone automatically holds your first caller.

2. Streamlined Call Transfers

Using the Zoom Computer App

- **Blind Transfer (Fast Routing):** Click **Transfer**, type the staff member's name or extension in the search bar, then click **Blind Transfer**. The call is sent instantly.
- **Warm / Attended Transfer (Consultative):** Click **Transfer**, search for the contact, click **Warm Transfer**. This dials your colleague privately. Once they agree to take the call, click **Complete Transfer**.
- **Transfer Directly to Voicemail:** Click **Transfer**, type the extension, click **Transfer to Voicemail**. This sends the call straight to their mailbox without ringing their classroom or office.

Using the Physical Desk Phone

- Press the physical **Transfer** button, dial the 4/5-digit extension, and press **Transfer** again (for a Blind Transfer) or wait for an answer first (for a Warm Transfer).

3. Advanced Tools & Collaboration (Computer App)

- **Elevate Call to Zoom Meeting:** If speaking with another staff member internally via the app and you need to share documents, spreadsheets, or your screen, click the **Meet** icon on your active call layout. This transforms the voice call into a standard Zoom video meeting instantly.

Park a Call (Shared Orbit)

1. During an active call in the app, click **More** → **Park**.
2. The app will display a rotating retrieval code, e.g. ***821** — this number changes with every call parked, so always use the one shown for that specific call.
3. You can then page or message a colleague to pick up the call from any **user-licensed** phone on campus by dialing that exact code.



Central Islip School District

Common Area / classroom phones cannot retrieve a parked call — they'll return "the requested service is not available in your calling plan." Only user-licensed extensions can pick up a parked call.

- **Reviewing Logs:** Use the **History** tab to view missed or recorded calls, and the **Voicemail** tab to play back messages and view automated text transcriptions.

4. Zoom Computer App — Voicemail

The desktop application provides a visual inbox where you can quickly read transcriptions and play back audio.

- **Accessing Your Inbox:** Open the Zoom app, click the **Phone** tab, and select **Voicemail** from the top/side menu.
- **Listening to Messages:** Click on any message in the list. Press the **Play icon** to listen to the audio.
- **Reading Transcripts:** Zoom automatically generates a text transcription of the voicemail. Click on the message to expand and view the text.
- **Callback or Delete:**
 - Hover over the message and click the **Phone icon** to dial the caller back immediately.
 - Click the **Trash can icon** (or the three dots ... > **Delete**) to move the voicemail to your trash folder.

5. Recording a Voicemail Greeting via the Computer App

Access the Phone Settings

1. Open and sign in to the **Zoom Workplace app** on your computer.
2. Click your **profile picture or initials** in the top-right corner, then select **Settings**.
3. On the left side of the settings window, click **Phone**.
4. Locate the **Voicemail and forwarding** section.

Choose Your Time Profile

Depending on your schedule, you can set different greetings:

- Click the **Business hours** tab to record your standard daytime greeting.
- Click the **Closed hours** tab if you want to record a separate after-hours or weekend greeting.

Record Your Audio

1. Under **When a call goes unanswered**, click the dropdown menu next to the voicemail option and select **Add new greeting**.
2. Select your language from the options provided.
3. Choose **Record by computer** to use your machine's microphone.
4. Click the red **Record** button and speak clearly to record your custom greeting (up to 4 minutes long).
5. Click **Stop** when finished. Use the play button to preview it, or choose to re-record if needed.
6. Give your recording a name (e.g., "Main Greeting 2026") and save it.

