



A MITEL  
PRODUCT  
GUIDE

## Mitel Phone System Integration (PSI) with Zoom

User Guide

08/2025

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# 1 Changes in current issue

Date	Issue no.	Change description	Chapters
August 2025	11	Added chapters for Visual Voicemail functionality	<a href="#">Main interface</a> on page 8 <a href="#">Making a call from the voicemail inbox</a> on page 12 <a href="#">Visual Voicemail inbox</a> on page 25 <a href="#">Opening the voicemail Context Menu</a> on page 25 <a href="#">Listening to voicemail</a> on page 26 <a href="#">Filtering voicemail</a> on page 26 <a href="#">Editing voicemail</a> on page 27
July 2025	10	Added note regarding media presence between Zoom and PBX	<a href="#">Presence status</a> on page 29
July 2025	09	Added note regarding adaptive UI for call forwarding	<a href="#">Forwarding calls</a> on page 19
June 2025	08	Changed navigation path for Hide incoming calls configuration  Added restrictions for the call forwarding banner	<a href="#">Disabling call waiting</a> on page 19 <a href="#">Forwarding calls</a> on page 19
June 2025	07	Removed <i>prerequisites</i> chapter, updates after review throughout the document.	-
June 2025	06	Added note regarding DND status	<a href="#">Presence status</a> on page 29
May 2025	05	Removed DND, Call Forward access codes. New chapter for call forwarding. Updates on Presence status	<a href="#">Forwarding calls</a> on page 19 <a href="#">Access codes</a> on page 23 <a href="#">Presence status</a> on page 29

Date	Issue no.	Change description	Chapters
Apr 2025	04	Added feature limitations for MiVoice Business	<a href="#">Access codes</a> on page 23 <a href="#">Switching to a video call (Meet)</a> on page 18
Apr 2025	03	Document metadata, added MiVoice Business in supported PBXs	<a href="#">Prerequisites</a> <a href="#">Presence status</a> on page 29 <a href="#">Feature set</a> on page 6
Mar 2025	02	-	-
Feb 2025	01	Document creation	-

## 2 Overview

This guide describes how to use the **phone capabilities** of the Zoom Phone System Integration (PSI).

The document contains specific information for call handling, such as answering and transferring calls.

It **does not** provide information on how to use other functions of the Zoom, such as the **Team Chat, Docs** etc.

If a particular function on Zoom is not available, this may be due to one of the following reasons:

- The function is not configured for your user, in which case please contact the system administrator.
- The communication system you are using does not support this function. In this case, please contact your sales partner for information.

### 2.1 Feature set

Zoom is a desktop and mobile app that can be used with the following communication systems:

- Unify OpenScape Voice
- Unify OpenScape 4000
- MiVoice Business

It allows you to make and receive phone calls using the Zoom client.

With Zoom you can easily:

- Make calls and receive calls
- Answer, decline or end a call
- Place calls on hold and retrieve them
- Access to your voicemail
- Transfer calls (warm transfer, blind transfer)
- Manage call waiting
- Forward calls
- Handle multiple calls (up to 3 calls on hold)
- Host a 3-party local conference
- Send DTMF commands during a call
- Use access codes for specific actions (i.e. call forwarding)
- Add calls (alternate between calls, merge calls to a conference)
- Merge two calls into a conference
- Make emergency calls (NG911 compliance)
- See the presence status of Zoom users
- Escalate audio-only call to meeting (video call)
- Contacts directory sync (Corporate, External, Personal)
- Single Sign On (SSO) login to Zoom workplace
- Voicemail indication, voicemail speed dial
- Set Do Not Disturb (DND) to avoid receiving calls
- Call history

## 2.2 Supported platforms

You can use Zoom on the following OS / platforms:

- Windows Desktop
- Mac PC
- Android mobile devices
- iOS devices

## 3 Zoom client

### 3.1 Signing in

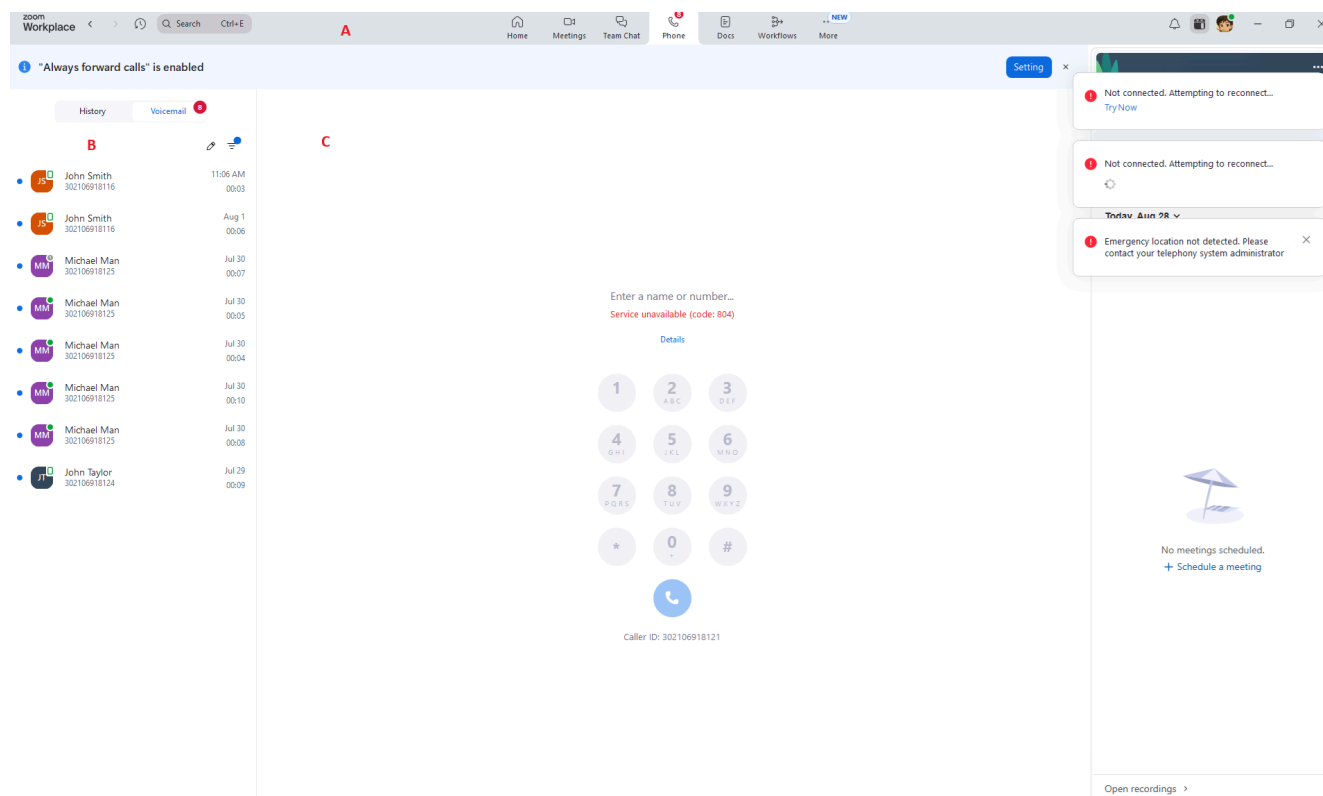
#### Step by Step

- 1) Open the Zoom client on your device.
- 2) Type your email in the **Enter your email** text box.
- 3) Type your password in the **Enter your password** text box.  
You can select the **Keep me signed in** option, to store your credentials.
- 4) Click **Sign in**.

**NOTICE:** The first time you sign in, a verification code is sent to the email address of your Zoom account. If you are already logged in to another device, an authentication request will be sent to that device.

### 3.2 Main interface

The Zoom main user interface consists of three main sections.





Section	Description
A	<p><b>Navigation menu/bar</b> - Displays different menus and options available.</p> <ul style="list-style-type: none"> <li>• Back and Forward arrows to navigate between windows</li> <li>• History button to switch between different tabs</li> <li>• Search box (Ctrl + E)</li> <li>• Phone tab</li> </ul> <hr/> <p><b>NOTICE:</b> This guide only covers the Phone tab and does not provide details on other tabs.</p> <hr/> <ul style="list-style-type: none"> <li>• Help menu</li> <li>• Activity center</li> <li>• Calendar panel</li> <li>• User settings</li> <li>• Window operations (Minimize, Resize, Close)</li> </ul>
B	<p><b>History</b> - The default tab when <b>Phone</b> is selected.</p> <p>The following options are available when an entry on the History tab is selected:</p> <ul style="list-style-type: none"> <li>• Call the number</li> <li>• Create a new contact with the number</li> <li>• Add the number to an existing contact</li> <li>• Chat with the contact</li> <li>• Delete the call history entry</li> </ul> <p><b>Voicemail</b></p> <p>The following options are available when the Voicemail tab is selected:</p> <ul style="list-style-type: none"> <li>• Dial the caller that left the voicemail</li> <li>• Create a new contact using the information of the caller</li> <li>• Add the caller's number to an already existing contact</li> <li>• Initiate a chat session with the caller/contact</li> <li>• Download the voicemail</li> <li>• Play the voicemail</li> <li>• Mark the voicemail as read/unread</li> <li>• Delete the voicemail</li> <li>• Voicemail transcription (if available)</li> </ul>

Section	Description
C	<p><b>Main display area</b> - Displays information related to call handling and basic call functions, such as:</p> <ul style="list-style-type: none"><li>• Answer an incoming call</li><li>• Mute/unmute your microphone</li><li>• Add call</li><li>• Start a meeting</li><li>• Open the keypad</li><li>• Place a call on hold</li><li>• Minimize the window</li><li>• Transfer a call</li><li>• End a call</li><li>• Access voicemail</li><li>•</li></ul> <hr/> <p><b>NOTICE:</b> If Zoom/CloudLink is connected to an Emergency Service Provider, the following message appears "<b>Emergency location detected</b>" at the top right. Otherwise, you will see be prompted to contact your telephony system administrator.</p> <hr/>

### 3.3 Signing out

To sign out on your Zoom client:

#### Step by Step

- 1) Click on the avatar, at the top right of the app.
- 2) Select **Sign out** from the drop-down menu.

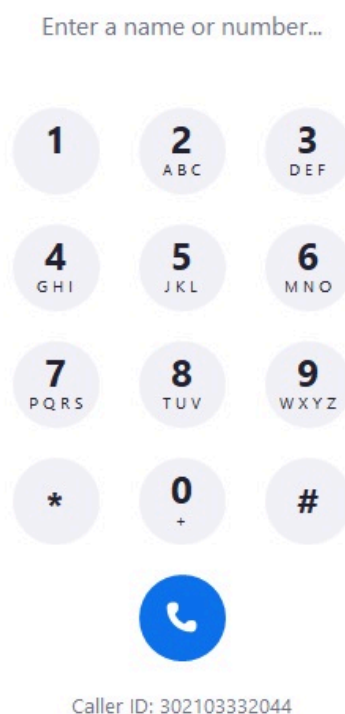
## 4 Calls

Via the Zoom client you can make and receive phone calls, view and control your current calls.

You can make or receive up to four calls at a time, via a single client (desktop or mobile). Only one call can be active at a time, while other calls can be either incoming, or on hold.

### 4.1 Making a call

#### 4.1.1 Making a call from the keypad



#### Step by Step

- 1) Open Zoom client.
- 2) Click on the **Phone** tab.

## Calls

### Receiving a call

- 3) Make a call in one of the following ways:
  - a) Use the on-screen keypad or device dial to enter a number, then click the dial button.
  - b) Start typing a name or a phone number to search your contacts.
    - Use the up/down arrows to select a contact and press `Enter` on your keyboard.
    - Use your mouse to hover over a contact and click to call.

### 4.1.2 Making a call from the history

#### Step by Step

- 1) Right click on a **History** entry on the left hand side of the **Phone** tab.
- 2) Click **Dial**.
- 3) Alternatively you can double click a **History** entry to dial it.

### 4.1.3 Making a second call

You can make a new call, while already in a call.

#### Step by Step

- 1) In the active call screen click **Minimize**.  
The keypad appears while the active call view is minimized.
- 2) Enter the name or number you want to call.  
The initial call is placed on hold.
- 3) You can choose to swap or merge calls (see [Add call](#) on page 16).

### 4.1.4 Making a call from the voicemail inbox

#### Step by Step

- 1) Navigate to **Phone > Voicemail**.
- 2) Click **Dial**.
- 3) Alternatively open the context menu of a voicemail (see [Opening the voicemail Context Menu](#) on page 25) and click **Dial**.

## 4.2 Receiving a call

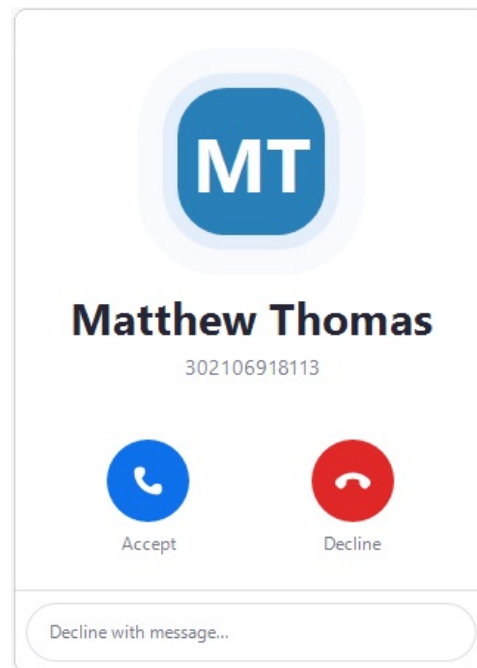
When receiving a call, you will see an incoming call alert on your display and you will hear an audio notification.

You can select answer, decline, or decline the call and send a message to the caller (only available when the caller is a Zoom user).

---

**INFO:** You can click and drag the incoming call window.

---



#### Procedure

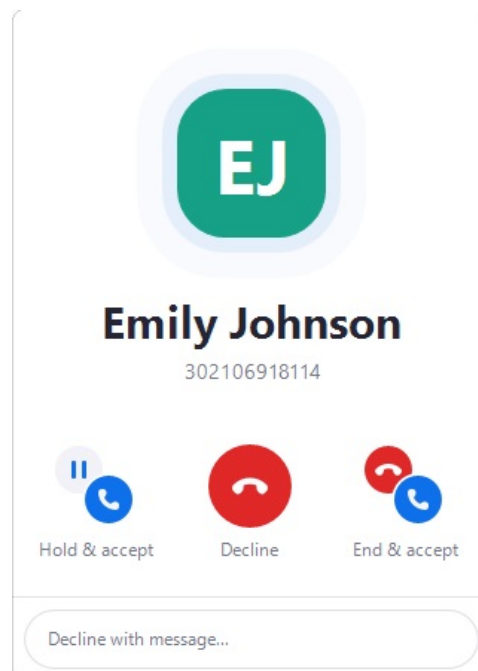
- To answer the call, click **Accept**.
- To decline the call, click **Decline**.
- To decline the call and send a message to the caller, click on the **Decline with message...** field and select one of the predefined messages from the drop-down list.  
The call stops ringing and the user receives a chat notification with your message.

### 4.2.1 Receiving a call whilst on an active call

When you receive a call, while you are on an active call, you will see an incoming call alert on your display and you will hear an audible notification.

## Calls

### Actions during an active call



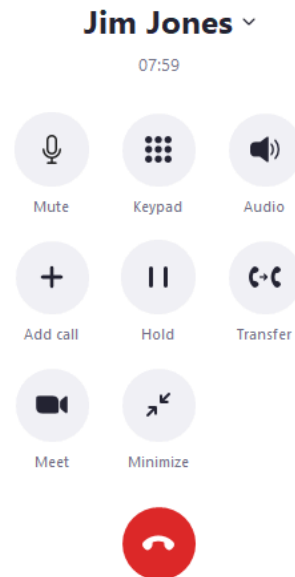
You can choose any of the following options:

#### Procedure

- **Hold & Accept:** Places the current call on hold and accepts the new call.
- **Decline:** Declines the incoming call.
- **Decline with message:** Declines the incoming call with an option to send a chat message to the caller.
- **End & Accept:** Ends the current call and accepts the new call.

## 4.3 Actions during an active call

While on an active call, the name and number of the caller is displayed, the duration of the call, and available call control.



The following table summarizes the call controls and their functions.

Action	Description
Mute / Unmute	Mute or unmute your microphone
Keypad	Open a keypad to call a number or enter DTMF (dual tone multi-frequency) digits
Audio	Open the audio settings
Add call <ul style="list-style-type: none"> <li>Swap</li> <li>Merge</li> </ul>	Allows you to make another call and places the active call on hold. You can choose to either swap (alternate) calls, or merge calls to create a conference
Hold / Unhold	Place the call on hold or retrieve the call
Transfer <ul style="list-style-type: none"> <li>Warm transfer</li> <li>Direct transfer</li> </ul>	Allows you type a number and choose to either, talk to the recipient before transferring the call (consultation transfer) or transfer the call directly (blind transfer)
Meet	Switches to a audio/video meeting, while placing the call on hold
Minimize	Minimize the active call window
End call	End the call

### 4.3.1 Muting/Unmuting your microphone

While on an active call, you can choose to mute / unmute your microphone.

#### Step by Step

- 1) To mute your microphone, click **Mute**.
- 2) To unmute your microphone, click **Unmute**.

### 4.3.2 Sending DTMF on an active call

During an active call, you can send Dual-Tone Multi-Frequency (DTMF) commands.

#### Step by Step

- 1) Click **Keypad**.
- 2) Use the on-screen keypad or the keyboard to enter DTMF.
- 3) Click **Hide keypad** to return to the active call.

### 4.3.3 Editing your audio settings

During an active call, you can edit your audio settings.

#### Step by Step

- 1) Click **Audio**.  
The **Settings** windows opens at the **Audio** tab.
- 2) Make any necessary changes and click **Close** at the top right of the window.

### 4.3.4 Add call

During an active call, you can add a call and either swap between them or merge the two calls in a conference.

#### 4.3.4.1 Merging two calls

When you are on two calls at the same time, you can merge them into a conference.

#### Step by Step

- 1) Click **Add call**.
- 2) Enter the name or number of the new participant.  
As you type, a list of suggested contacts is displayed. Once the new caller is selected, your current call is placed on hold.
- 3) Click **Merge call**.  
The calls are merged into a conference call.
- 4) To end the call, click **Hang up > End call for everyone**.  
All call participants are disconnected from the call.
- 5) Alternatively, to leave the call, click **Hang up > Leave the call**.  
Only you are disconnected from the call, while the remaining participants stay connected.

#### 4.3.4.2 Swapping between two calls

You can swap between an active call and a call on hold. When you do this, the active call is placed on hold and the call on hold becomes the active call.



When you are on two calls at the same time, you can swap between them.

#### Step by Step

- 1) Click **Add call**.
- 2) Enter the name or number you want to transfer the call to.  
As you type, a list of suggested contacts is displayed. Once the new caller is selected, your current call is placed on hold.
- 3) To return to the call on hold click **On hold - Click to Swap**.  
You return to the previous call, placing on hold the other call.

### 4.3.5 Placing a call on hold

While on an active call, you can place the call on hold so that you can perform another task such as making or answering another call.

#### Step by Step

- 1) To place a call on hold, click **Hold**.  
The other party will be placed on hold and hear music, until you retrieve or transfer the call.
- 2) To return to the call, click **Unhold**.

### 4.3.6 Transferring a call

You can transfer an active call to another person with or without consultation.

#### 4.3.6.1 Transferring a call with consultation (Warm transfer)

While on an active call:

#### Step by Step

- 1) Click **Add call**.
- 2) Enter the name or number you want to transfer the call to.  
As you type, a list of suggested contacts is displayed.
- 3) Select a contact and click **Warm transfer** speak to the new user before transferring.  
The first call is placed on hold so you can talk with the new user.
- 4) If needed, you can return to the previous call by clicking **On hold - Click to Swap**. You can also click **Cancel transfer** to cancel transferring the call.
- 5) Click **Complete transfer** to transfer the call.  
The call is transferred and you are disconnected from the call.

### 4.3.6.2 Transferring a call without consultation (Direct transfer)

You can transfer a call to another user directly, without speaking to them first.

While on an active call:

#### Step by Step

- 1) Click **Transfer**.
- 2) Enter the name or number you want to transfer the call to.  
As you type, a list of suggested contacts is displayed.
- 3) Select the contact you want to transfer the call and click **Direct transfer** without speaking to the new user.  
The call is transferred and you are disconnected from the call.

### 4.3.7 Switching to a video call (Meet)

While on an active call you can switch to a video call with the user. This option is available only to Zoom users. This feature is not supported for MiVB integrations.

#### Step by Step

- 1) Click **Meet**.  
A pop-up window **You have a phone call in progress** appears. It informs you that the current call will be placed on hold and the audio will be switched to the meeting.
- 2) Click **Continue**.  
The meeting window appears. The first time you join a meeting you will be asked to join with computer audio.
- 3) Click **Join with computer audio**. You can always do so, by enabling the **Automatically join audio by computer when joining** check box.
- 4) Once the other user clicks **Join**, you will be connected to a video call.
- 5) You can end the meeting by clicking **End** and choosing to either **End meeting for all** or **Leave meeting > Assign and Leave** (if you are the host of the meeting).

### 4.3.8 Handing off a call to another device

You can hand off an active call from one device to another. For example, you can move the call from your desktop app to your mobile app.

Note that a blind transfer to another of the Zoom user is not a seamless handover. When invoking a transfer, the caller will hear ringing as the transferred-to destination rings.

---

**NOTICE:** Handing off calls to other devices is not available for OpenScape 4000.

---

### Prerequisites

- You are in an active call on one of your devices (e.g. desktop app).
- You are logged in with the same user in both applications.

To hand over an active call to your mobile device:

### Step by Step

- 1) Click **Transfer**.
- 2) *Call your own phone number* and click **Direct transfer**.  
While the call is being transferred, it remains in a ringing state until answered.
- 3) On your mobile app, click **Answer** to answer the call.  
The transfer is complete and the call is handed over to your mobile device.

---

**NOTICE:** Alternatively, you park the call on one device and retrieve on another. Park feature should be available and configured for the users by the system administrator.

---

## 4.3.9 Disabling call waiting

### Step by Step

- 1) Click on your **Avatar > Settings > Notifications & sounds** (Desktop app).
- 2) Enable the **Hide incoming calls while on a call** checkbox.

---

**NOTICE:** If you are calling a user that has enabled the **Hide incoming calls while on a call** feature, you will see an indication that the calling party is busy.

---

You will now only receive one call at a time.

## 4.4 Forwarding calls

You can configure call forwarding using the user menu. To open the user menu click on your avatar image at the top right of the Zoom client, and then click **Forward calls**.

Upon successful configuration a banner/notification will appear at the main window, to inform the user that call forwarding is activated. The banner only appears for the **Always forwarding** method, including **Internal/External** callers, for this method.

---

**NOTICE:** Some PBX - Zoom integrations can have a different feature set. For example: Always forwarding from internal and external callers is not supported by MiVB. Similarly, Forward

---

Busy from internal and external callers and Forward No Answer from internal and external callers are not supported by OS4K. The screenshot below is from a Zoom - OSV integration. Other PBXs can have a slightly different user interface.

---

**NOTICE:** The call forwarding UI of Zoom PSI dynamically adjusts based on the forwarding types assigned to the subscriber and can be controlled by a CSTA application, like CloudLink Gateway.

For example, if the Call Forwarding Internal/External feature is not assigned to an OSV subscriber, Zoom PSI only shows the standard Call Forwarding types.

---

**Select a method to forward calls**

**Always forwarding**

☐ manual

☐ manual  Input number

☐ manual  Input number

**Forward when busy**

☐ manual

☒ manual  02103331018 ×

☒ manual  02103331019 ×

**Forward when no answer**

☐ manual

☒ manual  02103331018 ×

☒ manual  02103331019 ×

### Call forwarding methods

The available options for call forwarding are the following:

- **Always forwarding:** unconditional - all calls are forwarded.
- **Forward when busy:** when you are busy in a call, forward incoming calls.
- **Forward when no answer:** if you do not answer the call within a predefined time (i.e. 24 seconds) the call is forwarded.
- For each of the above methods, you can set a different number for **Internal** and/or **External** callers.

To configure one of the above options:

- 1) Click to enable the radio button, below the call forwarding type of your choosing.
- 2) If available, choose a PBX-based entry from the **manual** drop-down menu, to automatically set the forwarding destination.
- 3) Type the number/destination to forward all callers in the **Input number** field.
- 4) If you haven't set a number/destination to forward all callers (step 3), you can set a call forwarding destination only for **Internal** and/or **External** callers.
- 5) Click **Save**.

## 5 Access codes

Access codes allow the user to quickly set-up alternate numbers for call forwarding and other actions.

Access code prefixes can be configured via the communication systems (i.e. OpenScape Voice). Please contact the administrator of the system to provide the relevant codes.

The following access codes functions are available for configuration:

**Call back** (Call back access codes are not available for OpenScape 4000)

- Call back busy - When the party you are calling is Busy, enter the **Call back** access code and the system will automatically call you back when the user is free
- Call back no reply - If the calling party does not answer the call, the caller can enter the **Call back** access code and the system will automatically call you back

### **Additional features**

- Activate/Deactivate Call Forwarding Voice Mail
- Activate/Deactivate Outgoing CID Suppression
- Caller Identity Suppression Per Call
- Activate/Deactivate Anonymous Caller Rejection (not available for MiVB)
- Activate/Deactivate Call Completion Service (CCBS or CCNR) (not available for MiVB)
- Call Park to Server/ Call Park Retrieve from Server
- Directed Call Pickup

### 5.1 Enabling features via access code

To enable features via access codes, you need to dial the specific access code, i.e. forward all calls, along with the phone number.

---

**NOTICE:** Your system administrator should provide an access code list, as each system may have different access codes to activate/deactivate features.

---

#### **Step by Step**

- 1) \*40 which is the default code for forwarding all calls, followed by the number to receive those calls, for example 30210691800.
- 2) Click **Dial** to complete the request ( \*4030210691800).  
A system message is received, that the feature is active. Received calls while call forwarding is activated appear as missed calls in call history.
- 3) To disable the feature dial **#40**.

## 6 History (Call history)

History displays a list of all your incoming, missed and outgoing calls. You can use it to call your contacts or to respond to a missed call.

To view the call history, select **Phone** from the navigation menu/bar. Call history tab opens by default.

### Identifying calls

The call history shows different type of call entries:

- Missed / Unanswered Call (displayed in red)
- Incoming Answered Call
- Outgoing Call

They can be identified using the symbols at the top-right of each entry.

### Call details

Call history also displays the following:

- Avatar/picture of the caller/ callee
- Phone number of the caller/ callee
- Name of the caller/ callee (when it can be resolved e.g. from contacts)
- Date and time of the call

### 6.1 Deleting a call history entry

To delete a call history entry:

#### Step by Step

- 1) Select **Phone** from the navigation menu of the app.
- 2) In the History menu, select an entry and right-click to open the context menu.
- 3) Click **Delete**.

---

**NOTICE:** Proceed with caution as no deletion confirmation box is presented.

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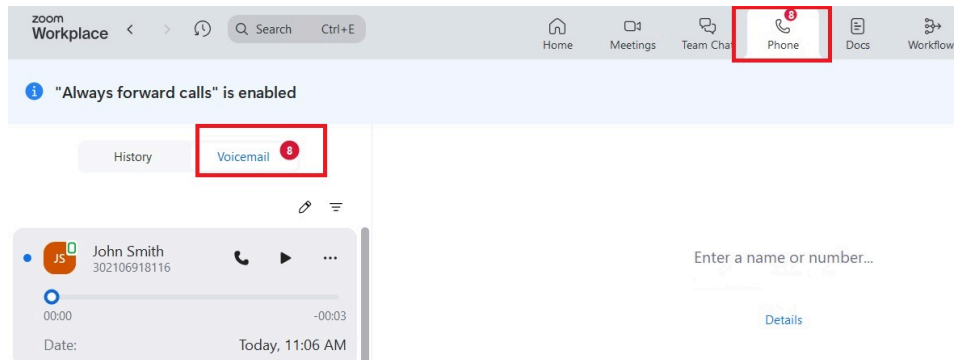
The call is removed from history.



## 7 Visual Voicemail inbox

Visual Voicemail (VVM) allows you to view and manage voicemail messages through the graphical interface of Zoom app (Desktop or mobile).

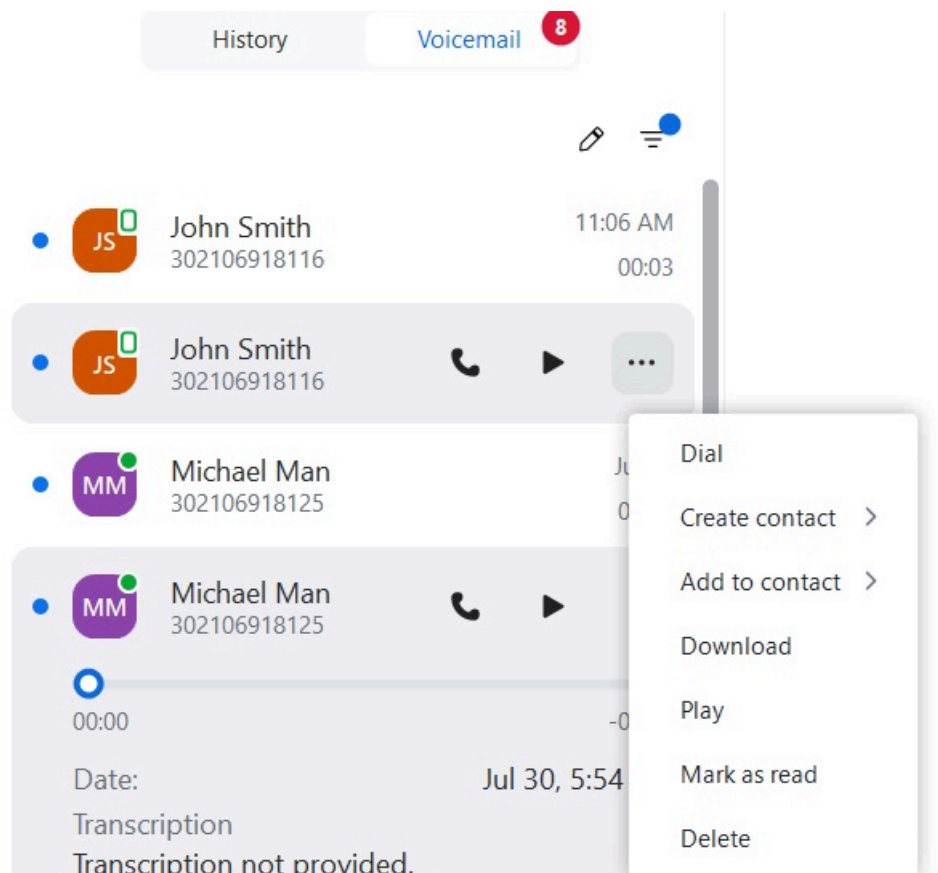
When you have unread voicemail an indication (red circle) appears next to **Phone** and **Voicemail**, displaying the number of unread voicemail.



### 7.1 Opening the voicemail Context Menu

To open the voicemail context menu:

Step 1. Select a voicemail and click on the three dots icon.



The voicemail context menu allows you to perform the following actions:

## Visual Voicemail inbox

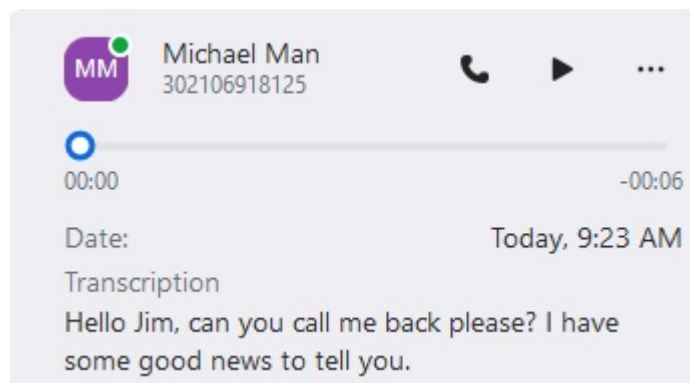
### Listening to voicemail

- **Dial** - Dial the caller that left the voicemail
- **Create contact > Create a Personal contact** - Create a new contact using the information of the caller
- **Add to contact > Add to Personal contact** - Add the caller's number to an already existing contact
- **Chat** - Initiate a chat session with the caller/contact
- **Download** - Download the voicemail
- **Play** - Play the voicemail
- **Mark as read/unread** - Mark the voicemail as read/unread
- **Delete** - Delete the voicemail

## 7.2 Listening to voicemail

You can see a list of voicemail with details such as:

- caller name/number
- date/time that the voicemail was left
- voicemail length
- transcription of the voice message (if the transcription is not available the message "Transcription not provided" appears instead).



To listen to your voice messages:

### Step by Step

- 1) Navigate to **Phone > Voicemail**.  
Your voicemail inbox appears.
- 2) Select a voicemail and click **Play**. Alternatively, open the context menu of a message (see [Opening the voicemail Context Menu](#) on page 25) and click **Play**.

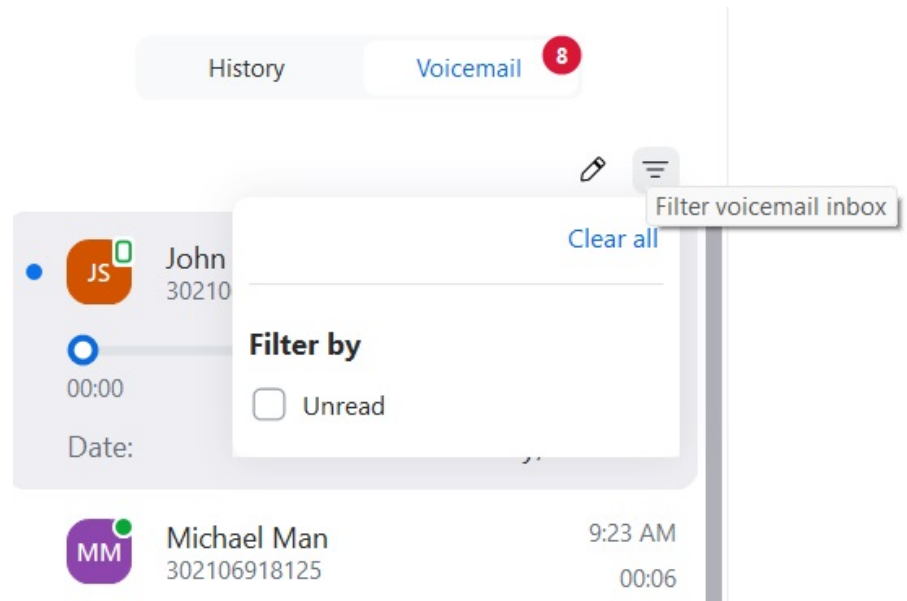
## 7.3 Filtering voicemail

You can only filter unread voicemail. To filter your unread voicemail messages:

### Step by Step

- 1) Navigate to **Phone > Voicemail**.  
Your voicemail inbox appears.

- 2) Click on **Filter voicemail inbox**.
- 3) Click the **Unread** checkbox.



- 4) Click **Clear all** to clear filtering and display all voicemail.  
When filtering is enabled a blue dot appears on top of the **Filter voicemail**



## 7.4 Editing voicemail

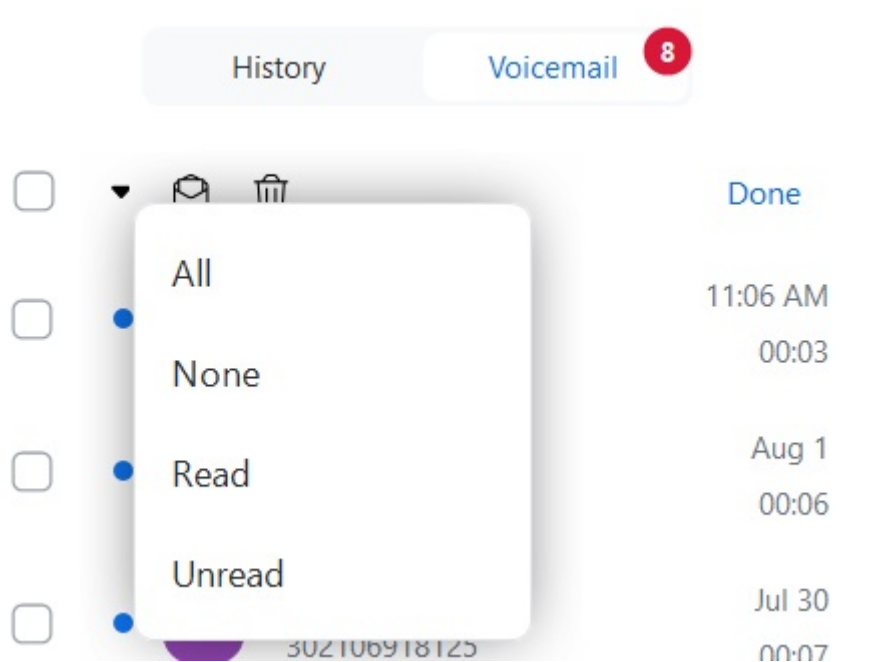
The editing voicemail menu allows you to mark as read/unread and delete voicemail.

### Step by Step

- 1) Navigate to **Phone > Voicemail**.  
Your voicemail inbox appears.
- 2) Click on **Edit voicemail**.
- 3) Select one or more voicemail.  
Alternatively, click
  - **All** to select all messages
  - **None** to deselect all messages
  - **Read** to select only read messages
  - **Unread** to select only unread messages
- 4) Click **Mark as read** or **Mark as unread** depending on the situation.

## Visual Voicemail inbox

5) Click **Delete** to delete the selected voicemail.



6) Click **Done**.

Alternatively, open the context menu of a voicemail (see [Opening the voicemail Context Menu](#) on page 25) and click **Mark as read**, **Mark as unread** and/or **Delete**.

## 8 Presence status

Media presence between the Zoom client and the PBX is synchronized. The user's presence is shown as 'Busy' if either the client or the device is on an active call.

The different presence statuses are described in the following table:

Presence / Availability status	Description
Available	You are online and available to contact.
Busy / On a call	You are online and on a call.
Do not disturb	<p>You do not want to be disrupted. Select one of the available options (20m, 1h, 2h, 4h, 8h, 24h) or set a custom time period for the status to end.</p> <p>This status is server-based and when enabled you will not receive incoming calls to your devices or zoom client. Currently, DND is automatically deactivated from client side when the user logs out. Upon login, Zoom PSI client enables DND again, if it was enabled before logout.</p>
Away	You are currently away from your device.
Out of office	You are offline or logged out of the app.

### 8.1 Setting your presence status

You can see your presence status in the top-right corner of the Zoom client, on the top-right corner of your avatar image.

To set your presence status:

#### Step by Step

- 1) Click on your avatar at the top-right of the app.
- 2) Hover over the current presence status and click to select one of the available options.
- 3) Your new presence status will be displayed to other users and be updated in the top right corner of your avatar.

