User Portal Guide

FortiVoice Cloud

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Change log

Date	Change description
2023-12-20	Added Call recording on page 15 and Fax on page 17.

Introduction

As a user of a phone extension on FortiVoice Cloud, the FortiVoice Cloud user portal is a web-based platform that allows you to perform the following tasks:

- Check your voicemail including playing, deleting, forwarding, or saving voicemails.
- Check your recorded calls including playing, deleting, or saving the voicemails.
- Receive and send faxes.
- Register your FortiFone desk phone and FortiFone softclient (mobile and desktop) with FortiVoice Cloud.
- Add user conference call events in your calendar and invite attendees by email.
- View device details and set up programmable keys on your FortiFone desk phone.
- Configure various preferences for your extension and the user portal.

Logging in and logging out of the FortiVoice Cloud user portal

Before you begin

- After configuring your extension on FortiVoice Cloud, your FortiVoice Cloud administrator will send you a welcome email with registration details. Make sure to keep this email because you will need the details to complete the steps to log in to the FortiVoice Cloud user portal and register your device.

  Example of welcome email (showing the User Portal Login section only):

  Thu 12/2/2021 10:13 AM

  noreply@youcompany.com
  Your FortiFone account is ready for sign in

  To   Nathalie Gauthier

  Phish Alert

  User Portal Login

  1. Log in to the <u>user portal</u>.

  2. Use the following credentials:

  Extension: **206**
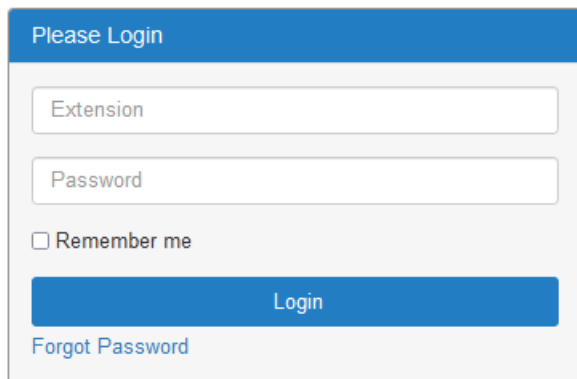
  Password: ▮▮▮▮

  3. Click Login.
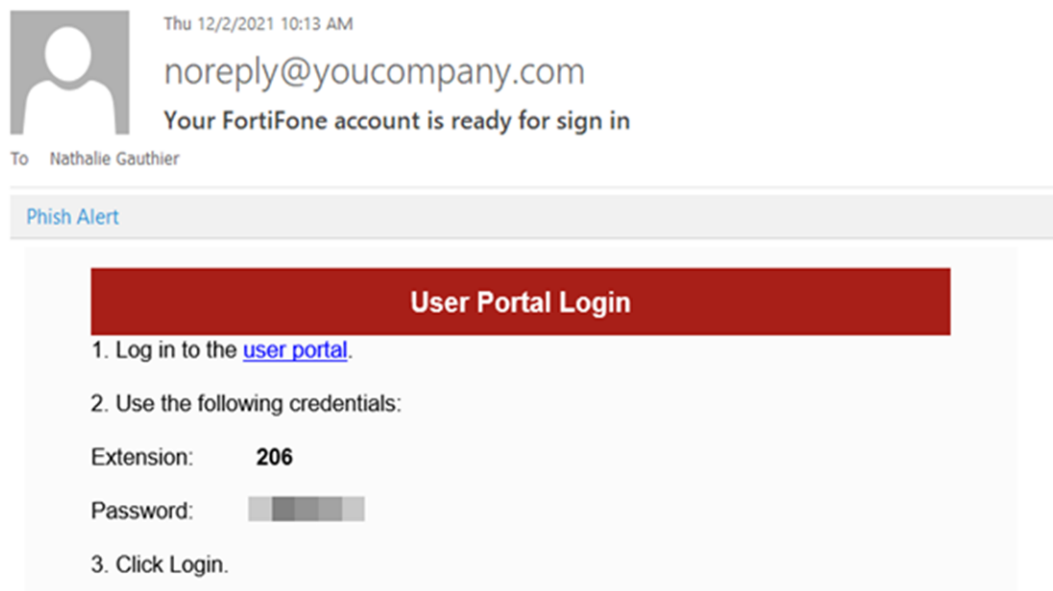
- Use one of the recommended web browsers:
  - Google Chrome version 119 or later
  - Microsoft Edge version 119 or later
  - Mozilla FireFox version 119 or later
  - Apple Safari version 16 or later

To log in to the FortiVoice Cloud user portal

1. Open the welcome email.

2. Go to the User Portal Login section and click **user portal**.
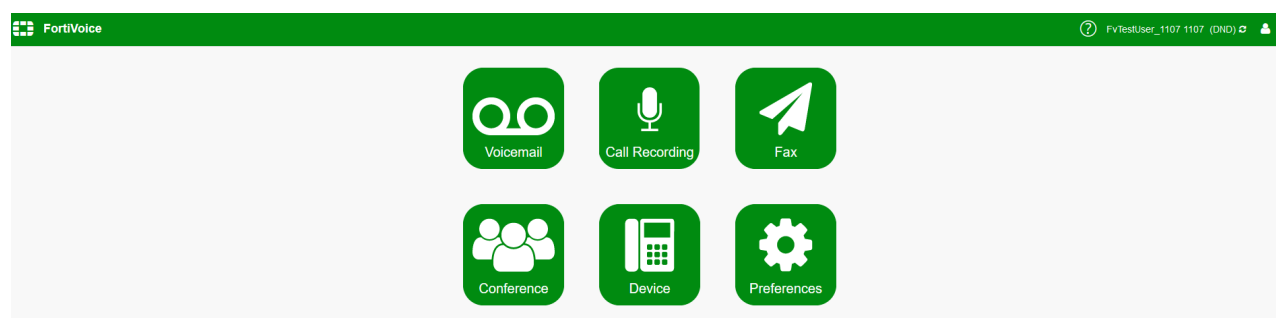   A web browser opens and prompts you to log in:

   Please Login

   | Extension |
   | Password |
   ☐ Remember me
   Login
   Forgot Password

3. Enter your **Extension**.

4. Enter your **Password**.

5. If you want the user portal to remember your extension and password and use them the next time you log in, click **Remember me**.

6. Click **Login**.
   The FortiVoice Cloud user portal shows the main page.

   > 💡 To have access to **Conference**, your FortiVoice Cloud administrator must update FortiVoice Cloud (Call Feature > Conferencing > User Conferencing > Users) to give your extension the privilege to organize conference calls.

   FortiVoice   FvTestUser_1107 1107 (DND)

   Voicemail   Call Recording   Fax

   Conference   Device   Preferences

To log out of the FortiVoice Cloud user portal

1. Click and then click **Log Out**.
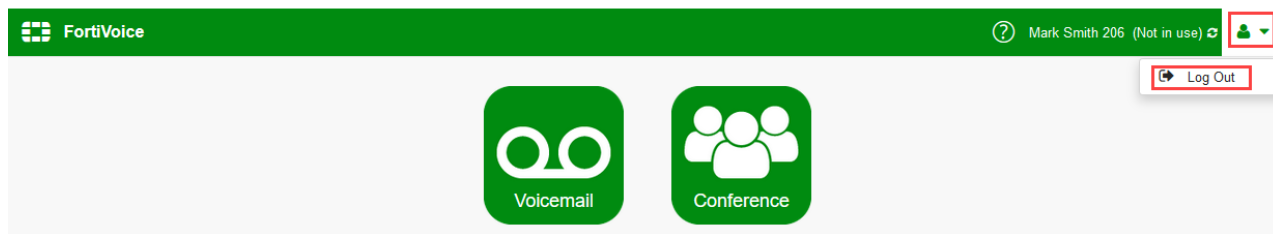
Navigating the FortiVoice Cloud user portal

To help you navigate the FortiVoice Cloud user portal, this section includes the following topics:

-
-

Main page overview

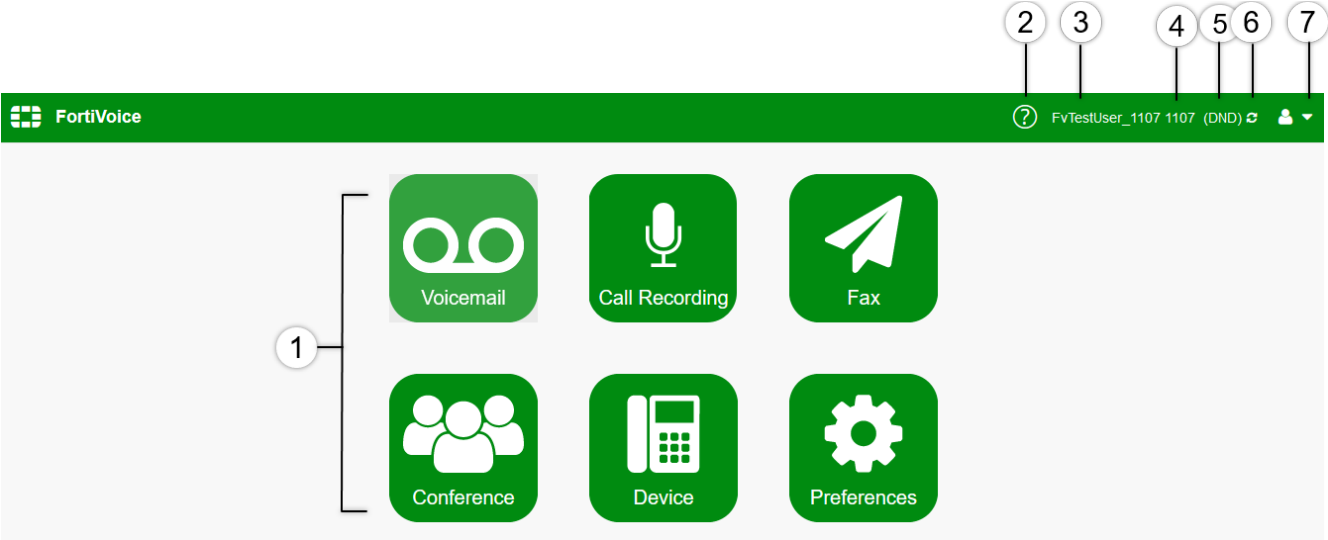| No.	Description
1	The main menu gives you quick access to six widgets (Voicemail, Call Recording, Fax, Conference, Device, and Preferences). To open a widget, click on the icon. **Note**: To see the **Conference** widget, your FortiVoice Cloud administrator must update FortiVoice Cloud to give your extension the privilege to organize conference calls.
2	To access the FortiVoice Cloud user portal documentation in HTML and PDF formats.
3	The display name associated with your extension.
4	Your extension number.
5	The status of your extension such as: • DND (do not disturb) • In use • Not in use • Ringing

No.	Description
6	To refresh the extension status.
7	To log out of the FortiVoice Cloud user portal, click the down arrow and click **Log Out**.

Widget page example
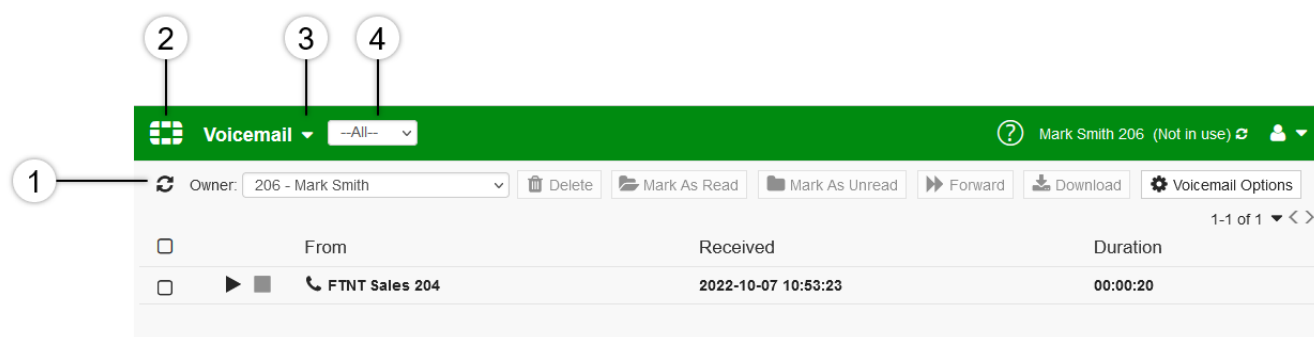
No.	Description
1	To refresh the widget page.
2	To return directly to the main page, click the Fortinet icon.
3	To select another widget without going to the main page, click the down arrow and select the widget.
4	To filter entries on the widget page.

Voicemail

The **Voicemail** menu allows you to manage your voicemails.
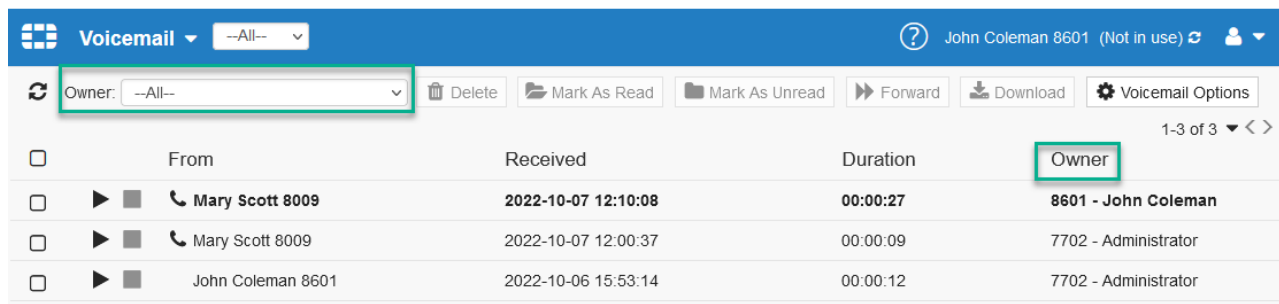
This section includes the following topics:

- Displaying voicemails on page 12
- Playing a voicemail on page 13
- Deleting a voicemail on page 13
- Forwarding a voicemail to another extension on page 13
- Downloading a voicemail on page 13
- Setting voicemail options on page 14

Displaying voicemails

Use this procedure to display voicemails for your extension. The **Voicemail** menu can also show voicemails from other users or groups in the **Owner** column, if the FortiVoice administration has configured your extension with this function.

1. Go to **Voicemail**.
2. From the drop-down menu, select one of the following filter choices:
    - **All**: Shows all voicemails for your extension and from other users or groups, if applicable.
        - New voicemails show in bold.
        - Urgent voicemails show in red.
    - **Inbox**: Shows new voicemails. After you listen to a voicemail, the system moves the voicemail to the **Old** list and removes the bold style.
    - **Urgent**: Shows voicemails marked as urgent by the caller. Urgent voicemails show in red.
    - **Old**: Shows voicemails that you have already listened to.
3. If the FortiVoice Cloud administrator has allowed your extension to receive a notification when one or more users or groups receive a voicemail, then the **Owner** filter and column are visible to show the extension to which the voicemail belongs to. Here is an example:

	From	Received	Duration	Owner
	Mary Scott 8009	**2022-10-07 12:10:08**	**00:00:27**	**8601 - John Coleman**
	Mary Scott 8009	2022-10-07 12:00:37	00:00:09	7702 - Administrator
	John Coleman 8601	2022-10-06 15:53:14	00:00:12	7702 - Administrator

Playing a voicemail

1. Go to **Voicemail**.
2. In the list, locate the voicemail that you want to listen to.
3. Click **Play** ▶.

Deleting a voicemail

1. Go to **Voicemail**.
2. In the list, locate the voicemail that you want to delete.
3. At the beginning of the row, select the checkbox for that voicemail.
4. Click 🗑 Delete .

Forwarding a voicemail to another extension

1. Go to **Voicemail**.
2. In the list, locate the voicemail that you want to forward to another extension.
3. At the beginning of the row, select the checkbox for that voicemail.
4. Click ⏩ Forward .
5. In **Forward to**, select the extension.
6. Click **OK**.

Downloading a voicemail

You can download a voicemail to a Waveform Audio (WAVE) file.

1. Go to **Voicemail**.
2. In the list, locate the voicemail that you want to download.
3. At the beginning of the row, select the checkbox for that voicemail.
4. Click ⬇ Download .
5. To confirm the download of the WAV file, click **OK**.

Setting voicemail options

1. Go to **Voicemail**.

2. Click [⚙ Voicemail Options].

3. Configure the following fields:

GUI field	Description
Voicemail handling	Enable to allow a caller to press 0 to talk to the operator during an announcement.
Name	• Set to **Standard** to use the system default name for the voicemail (the extension number), or set to **Personal** to use your own name for the voicemail. • If you select **Personal**, click **Call me** to record your own message using the phone, or click **Upload** to import a pre-existing sound file that meets the requirements {WAVE file (.wav) in PCM format or MP3 file and with a maximum size of 10 MB}.
Greeting	Select the voicemail greeting mode and greeting content. Click **Audio file** to record or import a sound file for various scenarios, depending upon the greeting type selected: • **Standard**: The default system defined greeting. • **Simple**: The greeting that applies to any time. • **Scheduled**: The greeting that comes with a schedule. Click **New** to add a system **Schedule** and assign a **Greeting**. This option is only available if you administrator has assigned this privilege to your extension. • **Conditional**: The greeting that applies when you are either busy or unavailable.

4. Click **OK**.

Call recording

The **Call Recording** menu displays all your recorded calls.

FortiVoice Cloud allows you to record phone calls to have a permanent record of particularly important phone calls.

> FortiVoice Cloud supports two types of recordings:
> - **Personal recording**: You can access your phone call recordings from the FortiVoice Cloud user portal.
> - **System recording**: With the administrator privilege, you can access phone call recordings from the FortiVoice Cloud GUI. For more details about this recording type, see the Call recording section in the FortiVoice Cookbook.

This section includes the following topics:

Recording a phone call

> Before recording a phone call, have the agreement of the person you are talking with or check your local laws regarding phone recording.

Prerequisite

To record a phone call: Make sure that the FortiVoice Cloud system administrator applies a user privilege, with the monitor/recording, personal recording option enabled, to your extension.

Procedure steps

1. During a phone call, start the personal recording by pressing *30.
2. To pause the personal recording, press *31. To resume the recording, press *30 again.
   The recording continues until you hang up.

Managing recorded calls

Prerequisites

- **To access a phone call recording**: Make sure that the FortiVoice Cloud system administrator applies a user privilege, with the user portal, call recording option enabled, to your extension.

Procedure steps

1. Go to **Call Recording**.
2. Select a recorded call.
3. Perform one of the following actions:
   - To listen to the recorded phone call, click ▶.
   - To remove the recorded phone call, click **Delete**. To confirm the deletion, click **Yes**.
   - To send the recorded phone call to another extension, click **Forward**. Select the extension and click **OK**.

   > When you download multiple recorded phone calls at the same time, they are saved in the TGZ file format. To decompress and extract the recorded phone calls from this file, use a third-party tool that supports the TGZ file format.

   - To save the recorded phone call (WAV file format), click **Download**. Select to save the file and click **OK**.

Fax

The **Fax** menu allows you to send and receive faxes. If your administrator enables you to monitor a fax extension, you can also manage all of the faxes received on that fax extension.

This section includes the following topics:

Viewing a fax received on your extension

1. Go to **Fax > Inbox**.
2. Locate the row for the fax that you want to view.
3. Go to the **Download** column and click the link.

Sending a fax

1. Go to **Fax > Sent** or **Fax > Inbox**.
2. Click **New**.

3. Configure the following fields:

GUI field	Description
To	Enter the fax number to which you want to send the fax.
Cover sheet type	**Uploaded**: Select this option to attach a cover sheet and update the next field (Attach cover sheet). **Dynamic**: Select this option to add details without attaching a cover sheet and configure the following fields: • **From**: Enter your name. • **Email**: Enter your email address. • **Subject**: Enter the subject of this fax. • **Company**: Enter the business name. • **Comments**: Optionally, enter a description.
Attach cover sheet	Select a cover sheet. For details, see Adding a fax cover page on page 18.
Attachment (PDF and JPEG only)	Click the plus (**+**) icon to locate the fax that you want to send as either a PDF or JPEG attachment.
Advanced	
Fax header	Enter the fax header such as the receiver's name, subject, or number of pages.
Station ID	Enter a station ID that shows on each fax sent from the FortiVoice unit.

4. Click **Send**.

Viewing a fax sent from your extension

1. Go to **Fax > Sent**.
2. Locate the row for the fax that you want to view.
3. Go to the **Download** column and click the link.

Adding a fax cover page

You can upload a cover page or add details in a dynamic cover page.

To upload a fax cover page

Requirements for the fax cover page are:
- Supported file types: JPEG and PDF
  - If you are using a PDF file as a fax cover page, make sure that the file is one page only.
- File size: 200 MB or less.

1. Go to **Fax > Cover Page**.
2. Click **New**.
3. Add a **Name**.
4. Optionally, add a **Description**.
5. Click **Upload**.
6. Locate and select the file.
7. Click **Open**.
8. Click **OK**.
9. You can then use this cover page in Sending a fax on page 17.

To add a dynamic cover page

1. Go to **Fax > Cover Page**.
2. Click **Dynamic Cover Page**.
3. Configure the following settings:
   - **To**: Enter the fax receiver's name.
   - **From**: Enter your name.
   - **Email**: Enter your email address.
   - **Subject**: Enter the subject of this fax.
   - **Company**: Enter your business name.
   - **Comments**: Optionally, enter a description.
4. Click **OK**.
5. You can then use this cover page for Sending a fax on page 17.

Monitoring a fax extension

To monitor incoming faxes on a fax extension, the FortiVoice Cloud system administrator must enable this function on your extension.

1. Go to **Fax > Monitor**.
2. In **eFax Account**, select the fax receiving account.
3. Locate the row of the fax that you want to view, delete, resend, or forward.
   - To view a fax, go to the **Download** column and click the link.
   - To delete the fax, select the checkbox at the beginning of that row and click **Delete**.
   - To resend the fax, select the checkbox at the beginning of that row and click **Resend**.
   - To forward the fax, select the checkbox at the beginning of that row and click **Forward**.

Conference

	To have access to **Conference**, your FortiVoice Cloud administrator must update FortiVoice Cloud (Call Feature > Conferencing > User Conferencing > Users) to give your extension the privilege to organize conference calls.

You can add a conference call event in your calendar and invite attendees by email.

FortiVoice allows two types of conferencing:

- **User conferencing**: You can set up conferences using the FortiVoice Cloud user portal.
- **Admin conferencing**: The administrator can set up conferences using the FortiVoice web-based manager. For details, see the Configuring conference calls section in the FortiVoice Cloud Advanced Administration Guide.

This section includes the following topics:

- Specifications for conference call events on page 20
- Adding a conference call event on page 21
- Adding a conference announcement on page 22

Specifications for conference call events

User conference call events include the following specifications:

- **User conference**: The maximum number of conference call events that you can host simultaneously.
- **Participant**: The maximum number of attendees that can join a conference call event.
- **Event duration**: There is no limit as to how long a conference call event can last.

Extension range	User conference	Participant
0 to 200	3	8
201 to 500	3	20
501 to 1000	5	20
1001 to 5000	10	20
5001 to 10000	20	20
10001 +	20	20

Note: For example, if you have 400 extensions, FortiVoice Cloud can host simultaneously 3 user conferences with a maximum of 20 participants for each conference.

Adding a conference call event

To have access to **Conference**, your FortiVoice Cloud administrator must update FortiVoice Cloud (Call Feature > Conferencing > User Conferencing > Users) to give your extension the privilege to organize conference calls.

You can add a conference call event in your calendar and invite attendees by email.

1. Go to **Conference**.
2. In the monthly calendar, click a date for your conference call event.
3. Complete the following fields:

GUI field	Description
Title	Add a title for the conference call event. This field is mandatory.
Conference ID	The ID associated with the conference call. This field is read-only.
Attendee PIN	The PIN that an attendee must enter to join the conference call. You can use the one generated by the system or change it.
Organizer PIN	The PIN that you must enter to host a conference call. Select one of the following options: • **Use voicemail PIN** - This code is also used to access your voicemail messages. • **Use personal code** - This code is also used to access restricted calls. • **Specific** - You can use the suggested code or specify your own code.
Description	Optionally, add details about this conference call event.
Location	Optionally, add information about the location of this conference call event.
Start time	Both start and end times use the time zone setting available in Preferences > Display Preference. Select the time for the conference call event to start. If the event will last all day, do not select a start time but enable **All day event** below.
End time	Select the time for the conference call event to end. If the event will last all day, do not select an end time but enable **All day event** below.
All day event	Enable if the duration of the conference call will be an entire day.
Recurrence	If you want the conference call event to be on a repeating schedule, click **None**, update the recurrence settings, and click **OK**.

GUI field	Description
Attendee	For details about the attendee limit for user conferencing, see Specifications for conference call events on page 20. 1. Click **Add Attendee**. 2. Add an email and a display name, and click **Create**. 3. Repeat steps 1 and 2 for every attendee.

4. To save the conference call event and sent the invitation email, click **OK**.

Email example received by an invited attendee

Juliet Higgins has invited you to a Conference Call - New phone model	
Subject:	New phone model
Organizer:	Juliet Higgins - ▮▮▮@gmail.com'
When:	Fri Jan 28 2022 21:00
Location:	Ottawa
Conference ID:	551749
Conference PIN:	216578
Access:	Please dial ext 7500 to attend this conference.
Attendees:	Nathalie - '▮▮▮@fortinet.com' Simon - '▮▮▮@bell.net'
Description:	

Attending?   **Accept** - **Tentative** - **Reject**

Adding a conference announcement

> To have access to **Conference**, your FortiVoice Cloud administrator must update FortiVoice Cloud (Call Feature > Conferencing > User Conferencing > Users) to give your extension the privilege to organize conference calls.

You can add a conference announcement to personalize the greeting that all attendees will hear after they enter the conference ID to join your conference call event.

1. Go to **Conference**.
2. Click **Conferencing Options**.
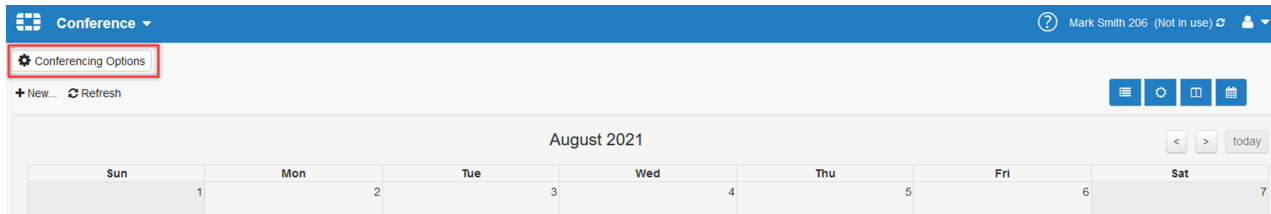
The UI displays the following pop-up window:
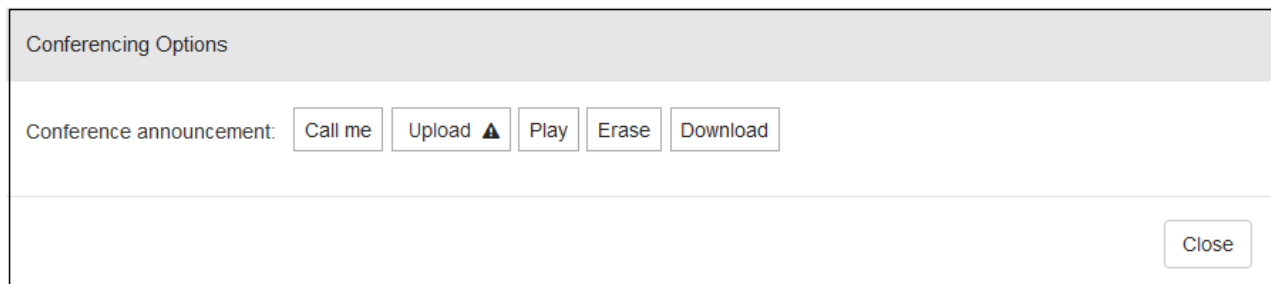
3. You have two options:
   - Option 1: To initiate the creation of an announcement:
      i. Click **Call me**.
      ii. Answer your phone.
      iii. Follow the prompts to record the announcement.
   - Option 2: To use an announcement that you have already recorded:
      i. Verify that the file meets the following requirements:
         - Format: WAV
         - Channel: Mono
         - Bit rate: 8000 Hz (8 kHz)
         - Sampling: 16-bit PCM
      ii. Click **Upload**.
      iii. Select the file and click **Open**.
4. Click **Close**.

Device

The **Device** menu allows you to register your devices, set programmable keys on your FortiFone desk phone, and perform other tasks for the FortiFone softclient.

This section includes the following topics:

Registering your devices using a phone activation email
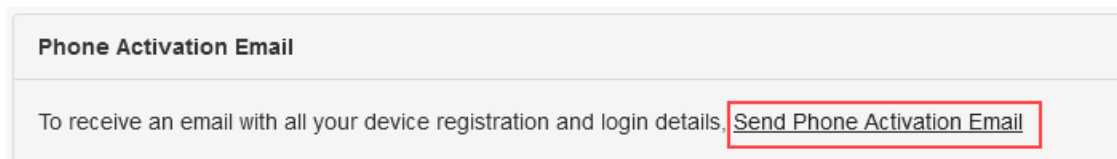
Use the welcome email from your FortiVoice Cloud administrator to register your devices. If you no longer have that welcome email, use this procedure to send the phone activation email to your email address.

Before you begin

- Make sure that you have entered your email address in **Preferences > Notification Options**.

To register your devices using a phone activation email

1. Go to **Device**.
2. In **Phone Activation Email**, click **Send Phone Activation Email**.

> **Phone Activation Email**
>
> To receive an email with all your device registration and login details, Send Phone Activation Email

3. Click **OK**.
   Here is an example email (showing selected sections only):

Thu 12/2/2021 10:13 AM

noreply@youcompany.com

Your FortiFone account is ready for sign in

To
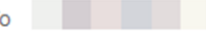
Phish Alert

FortiVoice Cloud

Welcome to FortiVoice Cloud! Mark Smith <206>, your FortiFone account is ready.
Please follow the instructions below to register your device.
(The Cloud PIN and QR Code will expire in 24 hours.)

FortiFone Desk Phone Registration

To register your FortiFone with FortiVoice Cloud:

1. Press the Menu button on the FortiFone.

2. Select Cloud

3. Input the following information and press Submit when done:

Cloud ID: 707 013 7030

Extension No.:   206

Cloud PIN: 285369

When accessing voicemail please use your voicemail PIN: **123123**

FortiFone Mobile Softclient Registration

To register the FortiFone Mobile Softclient with FortiVoice Cloud:

1. Install the FortiFone Mobile Softclient to your phone if you haven't already.

- Android users can download the latest version here.
- iOS users can download the latest version here..

2. To configure the FortiFone Mobile Softclient:

a. First time users:
     o Select "Scan QR Code" and scan the QR code below.
b. Current users:

4. Complete the device registration by following the instructions in the email. If you need more details, go to the applicable procedure and related video:

- Registering your FortiFone softclient for mobile
- Registering your FortiFone softclient for desktop
- Registering your FortiFone desk phone

Registering your FortiFone softclient for mobile

If you are not using the activation email to register your device, then you can alternatively use one of the following methods:

- Automatically register your FortiFone softclient for mobile account using a QR code.
- Manually register your FortiFone softclient for mobile account.

Before you begin

- If you are an Android user, download the latest Android version to your mobile phone and complete the installation.
- If you are an iOS user, download the latest iOS version to your mobile phone and complete the installation.

To register your FortiFone softclient for mobile account using a QR code

1. From the main menu of the FortiVoice Cloud user portal, click **Device**.
2. To prepare the QR code for scanning, go to **Soft Phones** and click **View Mobile Login Information**.
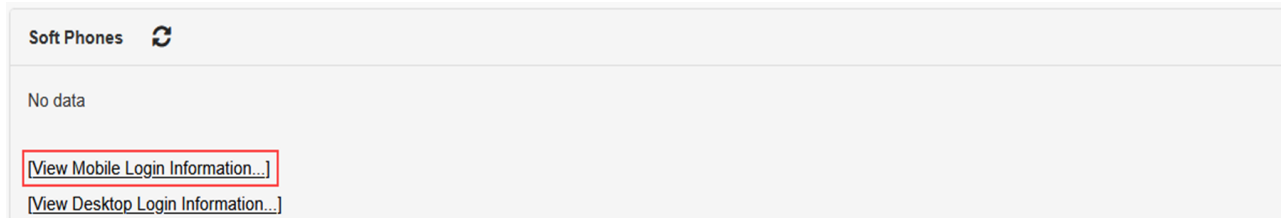
⚠ The generated QR code expires in 24 hours.

The web browser displays the QR code and login details. Here is an example:

3. If you are a first time user:

   a. In the FortiFone softclient on your mobile phone, tap **Scan QR code**.

   b. Point your mobile camera at the PC screen displaying the QR code. Make sure that the QR code appears clearly on the screen of your mobile device.

      The FortiFone softclient scans the QR code and configures the account settings for your extension.

      When the scan is complete and the account registration is successful, a green dot appears next to **Call Service Available**.
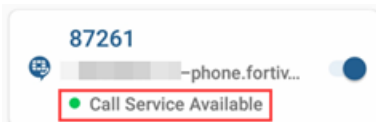
4. If you skipped the initial setup or you are a current user and want to add an additional account:

   a. In the FortiFone softclient on your mobile phone, tap .

   b. Tap **Account**.

   c. Tap (on Android) or (on iOS).

   d. Tap **Scan QR Code**.

   e. Point your mobile camera at the PC screen displaying the QR code. Make sure that the QR code appears clearly on the screen of your mobile device.

      The FortiFone softclient scans the QR code and configures the account settings for your extension.

      When the scan is complete and the account registration is successful, a green dot appears next to **Call Service Available**.
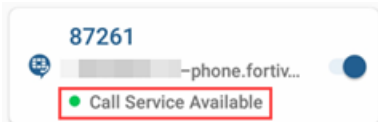
5. For details about using the FortiFone softclient for mobile, see the document for your platform:
   - FortiFone Softclient for Android User Guide
   - FortiFone Softclient for iOS User Guide

To manually register your FortiFone softclient for mobile account

1. From the main menu of the FortiVoice Cloud user portal, click **Device**.
2. Go to **Soft Phones** and click **View Mobile Login Information**.
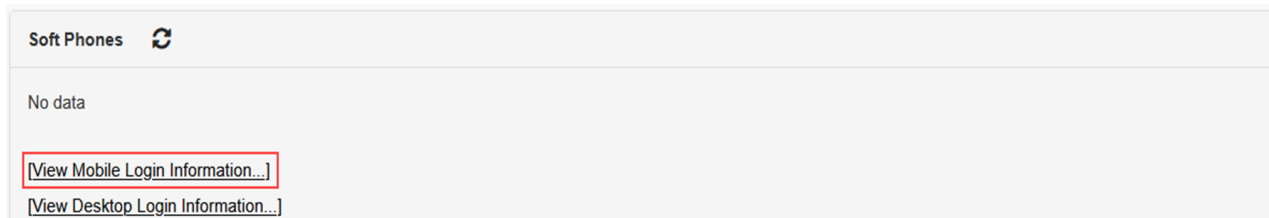
The web browser displays the login details. Here is an example:
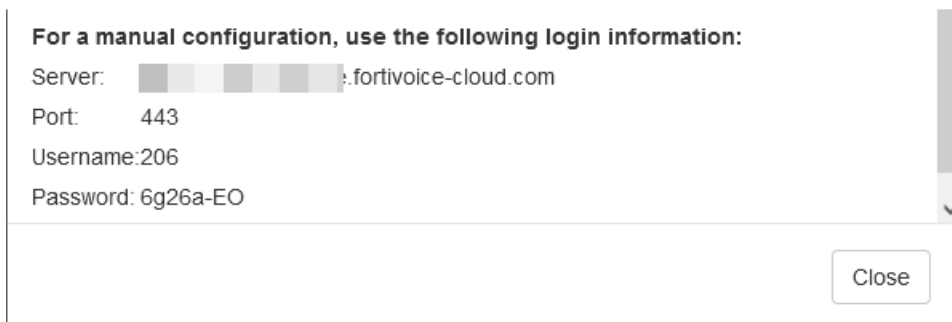
3. After the FortiFone softclient for mobile installation, the application prompts you to add a first account.
   a. Tap **Add FortiVoice Account**.
   b. In **Account name**, enter a name to identify the account.
   c. Enter the **Server**.
   d. Enter the **Username**. This is your extension.
   e. Enter the **Password**.
   f. Tap **Save**.

   When the scan is complete and the account registration is successful, a green dot appears next to **Call Service Available**.
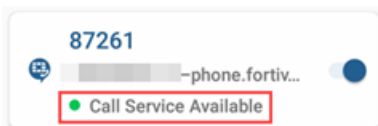
4. If you skipped the initial setup or you are a current user and want to add an additional account:

   a. In the FortiFone softclient on your mobile phone, tap [≡].

   b. Tap **Account**.

   c. Tap [⋮] (on Android) or [•••] (on iOS).

   d. Tap **Add FortiVoice Account**.

   e. In **Account name**, enter a name to identify the account.

   f. Enter the **Server**.

   g. Enter the **Username**. This is your extension.

   h. Enter the **Password**.

   i. Tap **Save**.

      When the scan is complete and the account registration is successful, a green dot appears next to **Call Service Available**.
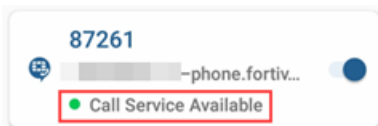
5. For details about using the FortiFone softclient for mobile, see the document for your platform:
   - FortiFone Softclient for Android User Guide
   - FortiFone Softclient for iOS User Guide

Registering your FortiFone softclient for desktop

If you are not using the activation email to register your device, then you can alternatively manually register your FortiFone softclient for desktop account.
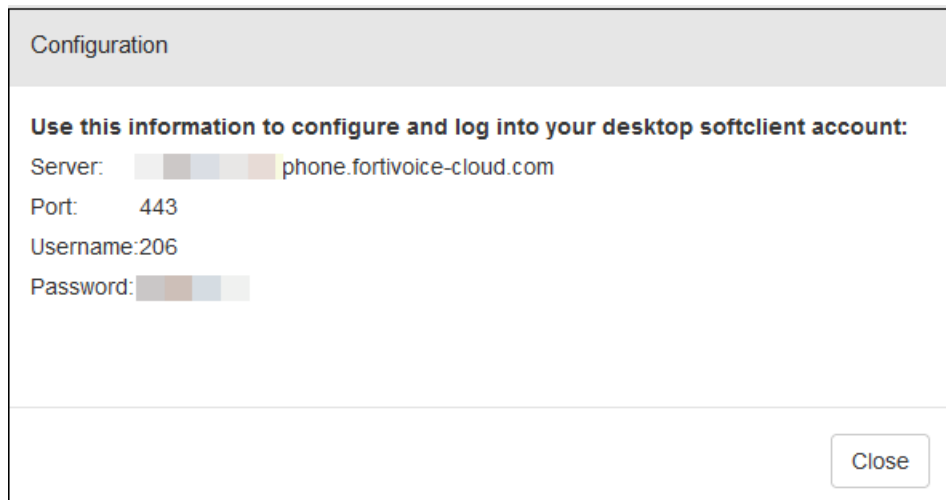
Before you begin

- Download the desktop version (MacOS or Windows) on your computer and complete the installation.
- If you want to automatically register your FortiFone softclient for desktop account, make sure to use the correct email address in Customizing notification options on page 41.

To manually register your FortiFone softclient for desktop account

1. From the main menu of the FortiVoice Cloud user portal, click **Device**.
2. In **Soft Phones**, click **View Desktop Login Information**.
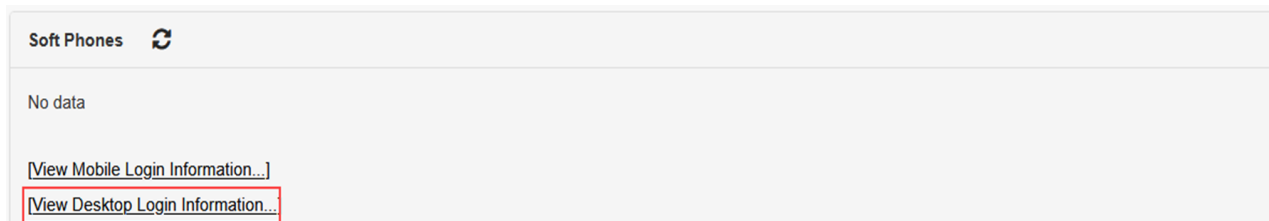
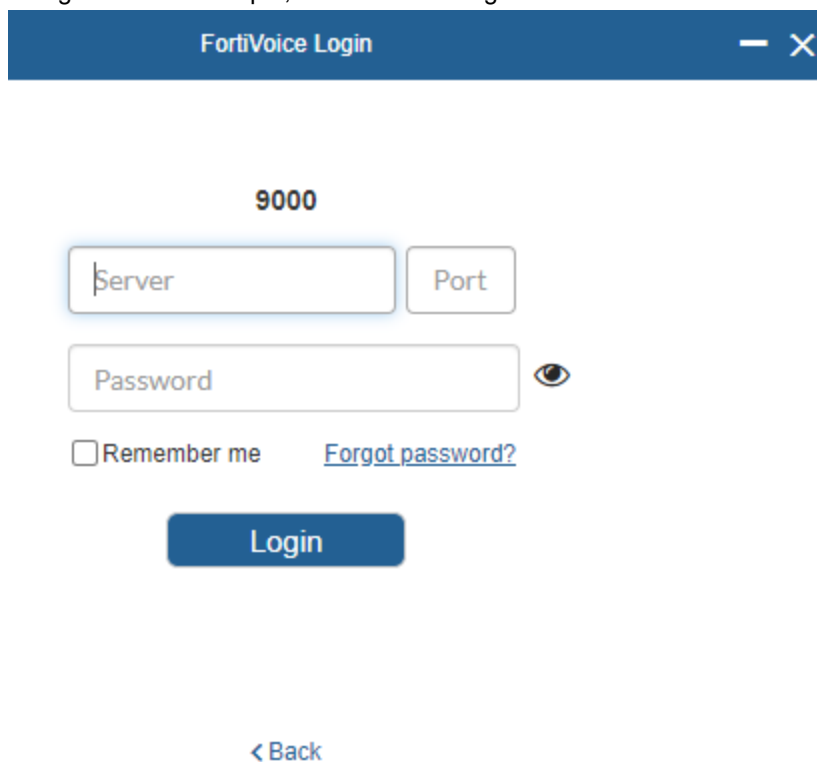3. The user portal displays the configuration details. Leave the dialog open. Here is an example:

4. On your computer, open the FortiFone softclient.
5. Enter your user name or extension number and click **Next**.
6. Using details from step 3, fill in the following fields:

7. Click **Login**.
   After the FortiFone softclient establishes a connection with FortiVoice Cloud, the UI opens.
8. You can now start using the FortiFone softclient for desktop. For details, see the FortiFone Softclient for Desktop User Guide.

Registering your FortiFone desk phone

Use this procedure to allow your FortiFone desk phone to register with FortiVoice Cloud.

Before you begin

- Connect the phone. For more details, see the guide for your phone model:
    - FON-280B Quick Start Guide
    - FON-380 Quick Start Guide
    - FON-380B Quick Start Guide
    - FON-480 Quick Start Guide
    - FON-480B Quick Start Guide
    - FON-580 Quick Start Guide

To register your FortiFone desk phone

1. From the main menu of the FortiVoice Cloud user portal, click **Device**.
2. In **Desk Phones**, click **Generate**.

| | | | The generated Cloud PIN expires in 24 hours. |

3. Leave the **Device** page open to access the new Cloud PIN, as well as the Cloud ID and Extension. You will need those details to complete the next step.
4. On the FortiFone desk phone, perform the following steps:
    a. Press the 🏠 button.
    b. Use the navigation keys to select **Cloud** ☁.
    c. Enter the **Cloud ID**.
    d. Press **OK**.
    e. Enter the **Extension No**.
    f. Press **OK**.
    g. Enter the **Cloud PIN**.
    h. Press **Submit**.
       The phone downloads the configuration and registers with FortiVoice Cloud.
    i. After the registration process is complete, press **OK**.

When you see the main screen, you can start using your FortiFone desk phone. For details, see the FON-x80 Series User Guide.

Customizing programmable keys on your FortiFone desk phone

The FortiVoice user portal only shows the **Programmable Key** menu, if you are using a FortiFone device that supports programmable keys.

The **Programmable Key** menu allows you to program phone keys for specific functions and easier call control.

Your FortiVoice Cloud administrator can define keys as admin-assigned (Phone System > Profile > Programmable Keys). You cannot customize these keys. However, your FortiVoice Cloud administrator can also define other keys as user-assigned, allowing you to program them yourself from the user portal.

Keys 1 and 2 are reserved by default and you cannot edit them. Your FortiVoice Cloud administrator may choose to reserve up to the first four lines.

To customize programmable keys

1. Go to **Device > Programmable Key**.

   In the list, you can see which keys are reserved, admin-assigned, and user-assigned.

   In the following example, the user has one **Page** of keys. Lines 1 and 2 are designated as **Reserved**. The remaining keys are designated as **User Assigned**. If necessary, contact your administrator to get more user assigned keys, which would then be configured under **Page 2** and **Page 3**.

Set Programmable Phone Key			
Page 1 ⌄			
Option:	Function	Resource	Label
1.	Reserved	Reserved	Reserved
2.	Reserved	Reserved	Reserved
3.	Extension appearance	2000 (AH100 Kitchen)	AH100 Kitchen 2000
4.	Line appearance	fve126 (1)	home
5.	Reserved for line	Account 1	
6.	--User Assigned--		
7.	--User Assigned--		

   Page 2 >

   Page 3 >

   Page 4 >

   ✔ OK   ✘ Cancel

2. For each **User Assigned** key that you want to add, complete the following fields. For more details about each key, see Programmable key descriptions on page 34.

    - In **Function**, select the type of action to occur when you press the programmable key.
    - In **Resource**, select the result of the selected function, if applicable.
    - In **Label**, keep the default or enter a name that will appear beside the programmable key on the FortiFone device.

3. To save changes, click **OK**.
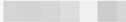
Programmable key descriptions

Function	Description	Resource	Label
Park	The FortiVoice Cloud administrator configures the call parking settings (park call number, park line start and end).		
	Places the call into the first available call park slot. You will hear a prompt telling you which slot the call has been parked in.	Stays blank.	Edit the label or keep the default label (Auto park).
System speed dial	Before using the system speed dial key, the FortiVoice Cloud administrator must configure the speed dial numbers on the system.		
	Allows you to quickly place a call to the selected extension or phone number at a touch of a button.	Make a selection.	Edit the label or keep the one assigned by the FortiVoice Cloud administrator.
User speed dial	Allows you to quickly place a call to an extension or a phone number at a touch of a button.	Click in the field and enter an extension or a phone number.	Edit the label or keep the one associated with the selected contact.
Intercom	The Intercom function works for internal extensions (not for external extensions).		
	Allows you to use the phone speaker of a local extension as an intercom.	Stays blank.	Edit the label or keep the default label (Intercom).
Extension appearance	Allows you to perform the following actions: • Monitor the status of the selected extension (idle, ringing, in use, DND, and on hold). • On FON-x80 series phones: Transfer a call to the selected extension. The FortiVoice Cloud administrator configures this setting as one of the	Select an extension from the list.	Edit the label or keep the one associated with the selected extension.

Function	Description	Resource	Label
	following transfer types: • Blind: Allows you to transfer a call without talking to the person receiving the transfer. • Attended: Allows you to announce the call to the person receiving the transfer and then complete the transfer.		
Line appearance	Allows you to monitor the status of a line (available, busy, or on hold).	Select a line.	Edit the label or keep the one associated with the selected line (or trunk).
Park appearance	Monitors the selected call park slots, informing you if there is a call parked.	Select the park slot to monitor.	Edit the label or keep the one associated with the selected line (or slot).
Twinning	Before using the Twinning function, make sure that: • The FortiVoice Cloud administrator has selected Twinning in a user privilege profile (Phone System > Profile > User Privilege - Basic Setting, Twinning) and applied that profile to your extension. • You configure the twinning function in **Preferences** (see Configuring the twinning setting on page 41).		
	Allows an external phone to ring along with your office phone, so you can answer the call at either phone. Pressing the Twinning programmable key enables or disables the function.	Stays blank.	Edit the label or keep the default label (Twinning).
Private Hold	Allows you to put a call on hold.	Stays blank.	Stays blank to use the Private Hold label.

Displaying FortiFone desk phone details

You can display details about your registered FortiFone desk phones.

1. Go to **Device**.
2. In **Desk Phones**, you can view details about your phones. Here is an example:

Desk Phones ⟳					
Phone model	**MAC**	**IP**	**Phone Info**	**Registry time**	**Expiry time**
Main - FortiFone-380			Fortinet FON-380 3.0.10.192	2021-12-02 09:44:59	2021-12-02 09:45:59

Cloud ID: 707-013-7030 (please ignore the "-" when input this number on the phone)

Extension: 206

Cloud PIN: To get a Cloud PIN, click [Generate]

See also:

Registering your FortiFone desk phone on page 31

Displaying FortiFone softclient details

You can display details about registered FortiFone softclient (mobile and desktop) and login information.

1. Go to **Device**.
2. In **Soft Phones**, you can view details about your FortiFone softclient. Here is an example:

Soft Phones ⟳					
Extension Number	**Client Version**	**Phone Info**	**OS Platform**	**OS Version**	**Revoke**
206	3.0.17.308	samsung-SM-J327W	Android	8.1.0	⊗

[View Mobile Login Information...]
[View Desktop Login Information...]

3. To display the login information of the FortiFone softclient for Android or iOS, click **View Mobile Login Information**.
4. To display the login information of the FortiFone softclient for Windows or Mac, click **View Desktop Login Information**.

See also:

- Registering your FortiFone softclient for mobile on page 26
- Registering your FortiFone softclient for desktop on page 29

Revoking a FortiFone softclient license

You can revoke a license for a device that you no longer want associated with your extension and managed by the FortiFone softclient.

1. Go to **Device**.
2. In **Soft Phones**, locate the softclient license that you want to remove.

3. Go to the **Revoke** column and click ⊗.

Soft Phones ⟳					
Extension Number	Client Version	Phone Info	OS Platform	OS Version	Revoke
87261	3.0.14.291	samsung-SM-J327W	Android	8.1.0	⊗

4. To confirm, click **Delete**.

Preferences

The **Preferences** menu allows you to customize some settings for your extension and the FortiVoice Cloud user portal.

This section includes the following topics:

- Customizing user settings on page 38
- Customizing display preferences on page 39
- Customizing programmable keys on your FortiFone desk phone on page 40
- Customizing incoming calls preferences on page 40
- Customizing quick modes on page 40
- Customizing notification options on page 41
- Configuring the twinning setting on page 41

Customizing user settings

1. Go to **Preferences**.
2. In **User Setting**, configure the following fields:

GUI field	Description
Number	Displays your extension number (read-only).
Display name	Displays the caller ID on the extension, usually the name of the extension user (read-only).
Access Level	There are three user access levels with associated features as following:

Features	Access Level		
	Basic	**Standard**	**Premium**
Configuration	No	Yes	Yes
Contacts and Click to dial	No	Yes	Yes
Console (appearance)	No	No	Yes
Call center console	No	No	No
Faxing	No	Yes	Yes

GUI field	Description
Picture	You can upload a picture file. When you place a call, the callee's phone displays the uploaded picture, if the phone model supports this feature. Before uploading a picture file, make sure that the file meets the following requirements: • Supported formats: JPEG and PNG • Width and height ratio: between 0.85 and 1.2 • File size: 5 MB or less To upload a picture, click ⬆. To delete a picture, click 🗑.
Change Voicemail PIN	Click to enter and confirm a new PIN for accessing your voicemail. You must enter your current PIN before choosing a new PIN.
Change User Password	The Change User Password is available when your FortiVoice Cloud administrator has set your extension with a local authentication type for web access. Click to enter and confirm a new user password for accessing the user portal. You must enter your current password before choosing a new password.

3. To save the changes, click **OK**.

Customizing display preferences

1. Go to **Preferences**.
2. In **Display Preference**, configure the following fields:

GUI field	Description
Phone language	Set the phone language for the extension.
Web language	Set the user portal language. The default is **English**.
Theme	Set the display color theme for the user portal. The default is **Green**.
Time zone	Set the time zone for the user portal. The default is **GMT -8:00 Pacific Time US & Canada**.

3. To save changes, click **OK**.

Customizing programmable keys on your FortiFone desk phone

For details, see the Customizing programmable keys on your FortiFone desk phone on page 32 in **Device**.

Customizing incoming calls preferences

1. Go to **Preferences**.
2. In **Incoming Calls**, you can configure the following settings:

GUI field	Description
Ring duration	Specify the length of time in seconds that incoming calls will ring before going to voicemail.
Call waiting	Enable to allow you to answer an incoming call while on another call.

3. To save the changes, click **OK**.

Customizing quick modes

Use quick mode settings to configure temporary call handling rules that do not affect your regular call handling settings.

1. Go to **Preferences**.
2. In **Quick Mode**, configure the following settings:

GUI field	Description
Effective mode	Shows the mode that is active. For example: Out of office: (expiring at 2022-01-15 09:00:00) If the Effective mode is blank, then none of the quick modes is enabled.
*720	To cancel the quick mode and revert the system to its regular schedule, dial *720 on your phone.
*721	To enable the **Out of office** schedule, dial *721 on your phone. To modify the option and time settings for this quick mode, click the underlined text.
*722	To enable the **Away schedule**, dial *722 on your phone. To modify the option and time settings for this quick mode, click the underlined text.
*723	To enable the **Other schedule**, dial *723 on your phone. To modify the option and time settings for this quick mode, click the underlined text.

3. To save the changes, click **OK**.

Customizing notification options

You can customize notifications for received voicemails, missed calls, and phone activation email.

1. Go to **Preferences**.
2. In **Notifications Options**, you can configure the following settings:

GUI field	Description
Voicemail	Select the email notification option to use when this extension receives a voicemail: • **None**: Do not send a notification. • **Simple**: Send an email notification. • **With attachment**: Send an email notification with the voicemail attached.
Missed call	Enable to send an email notification when you miss an incoming call.
Email address	Enter the email address(es) to which you would like email notifications (such as for voicemails, missed calls, and phone activation details) to be sent.

3. To save the changes, click **OK**.

Configuring the twinning setting

> The twinning option is only available if the FortiVoice Cloud administrator has selected Twinning in a user privilege profile (Phone System > Profile > User Privilege - Basic Setting, Twinning) and applied that profile to your extension.

With twinning, you allow an external telephone (cell phone or home phone) to replicate your internal office extension. When your desk phone rings, so does the twin phone.

1. Go to **Preferences**.
2. In **Twinning Setting**, select one of the following **Setting** choices and associated options, as applicable:
   • **Disabled**: Select to disable twinning.
   • **Simple**: Select to configure basic twinning by adding a phone number.
      • **Operation status**: Select **Activated** or **De-activated**.
      • **Number**: Enter the phone number to associate with your internal office extension.
   • **Scheduled**: Select to configure twinning by adding phone numbers based on a schedule or multiple schedules (three maximum).
3. To configure a programmable key on your desk phone for the twinning function, see Customizing programmable keys on your FortiFone desk phone on page 32.

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