

# User Guide

**FortiVoice Cloud User Portal**



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FortiVoice Cloud User Portal User Guide

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# Change log

Date	Change description
2026-03-05	DTMF programmable key added. See <a href="#">Programmable key descriptions on page 52</a> .
2025-09-18	New and updated sections: <ul style="list-style-type: none"><li>• <a href="#">Browser recommendation in Logging in and logging out of the FortiVoice Cloud user portal on page 7</a></li><li>• <a href="#">Filtering call records on page 14</a></li><li>• <a href="#">Downloading call records on page 15</a></li><li>• <a href="#">Managing the status of voicemails on page 18</a></li><li>• <a href="#">Importing a list of personal contacts on page 22</a></li><li>• <a href="#">Customizing a sound file for an announcement on page 28</a></li><li>• <a href="#">Reminder on page 40</a></li><li>• <a href="#">Customizing programmable keys on your FortiFone desk phone on page 58</a></li><li>• <a href="#">Change Voicemail PIN in Customizing user settings on page 56</a></li><li>• <a href="#">Registering your FortiFone phone on page 50</a></li></ul>
2025-04-15	Updated release of the FortiVoice Cloud User Portal Guide.
2022-01-28	Initial release of the FortiVoice Cloud User Portal Guide.

# Introduction

This document describes how to use the FortiVoice Cloud user portal. Although it aims to provide guidance for end users, administrators may also find the guide helpful.

The FortiVoice Cloud administrator must enable the user portal in the admin portal and also enable specific features for individual users in their user privileges.

To provide feedback about this document, you can send an email to [techdoc@fortinet.com](mailto:techdoc@fortinet.com).

## Features

The FortiVoice Cloud user portal is a web-based platform that allows you to perform the following tasks:

- Check your call history for received, placed, or missed calls.
- Check your voicemail including playing, deleting, forwarding, or saving voicemails.
- Manage your business and personal contacts, and view the business and corporate phone directories.
- Manage how the phone system handles your phone calls.
- Check your recorded calls including playing, deleting, or saving the voicemails.
- Receive and send faxes.
- Set up reminder events and invite guests.
- 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

This section describes how to access the user portal.

## **Before you begin**

After configuring your extension on FortiVoice Cloud, your FortiVoice Cloud administrator sends you a welcome email with the information for you to access your user portal account for the first time.

The welcome email contains:

- Link to log in to the user portal
- Extension number
- Password

Browser recommendation:

We recommend you use the latest version and official build of the following web browsers:

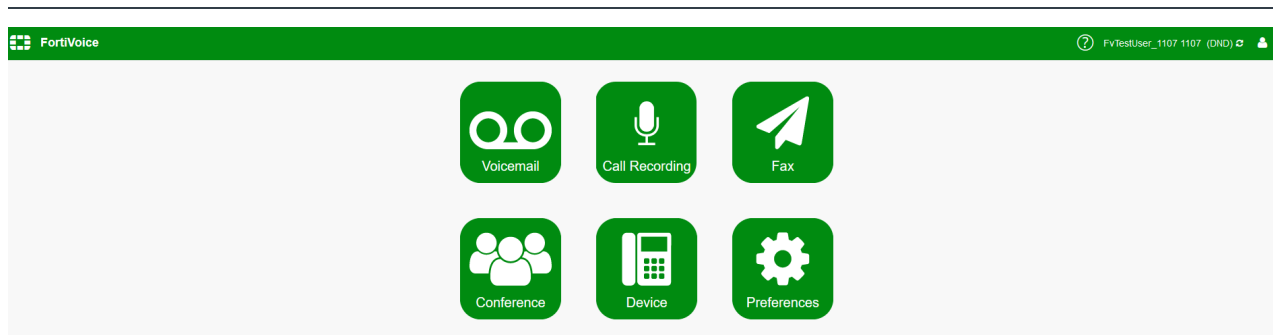
- Google Chrome
- Microsoft Edge
- Mozilla Firefox
- Apple Safari

## To log in to the FortiVoice Cloud user portal


1. Open the welcome email.
2. Go to the **User Portal Login** section and click the hyperlinked text **user portal**.  
A web browser opens and prompts you to log in.
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 opens on the main page.

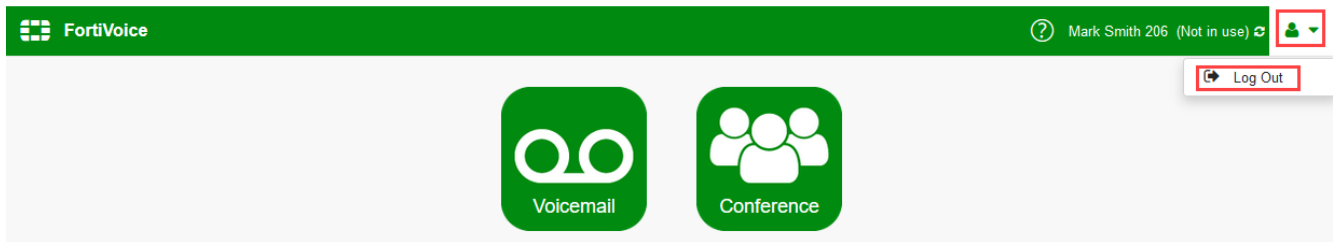


The **Conference** tile is available if your FortiVoice Cloud administrator has assigned the privilege to your extension.



## To log out of the FortiVoice Cloud user portal

Click  and then click **Log Out**.

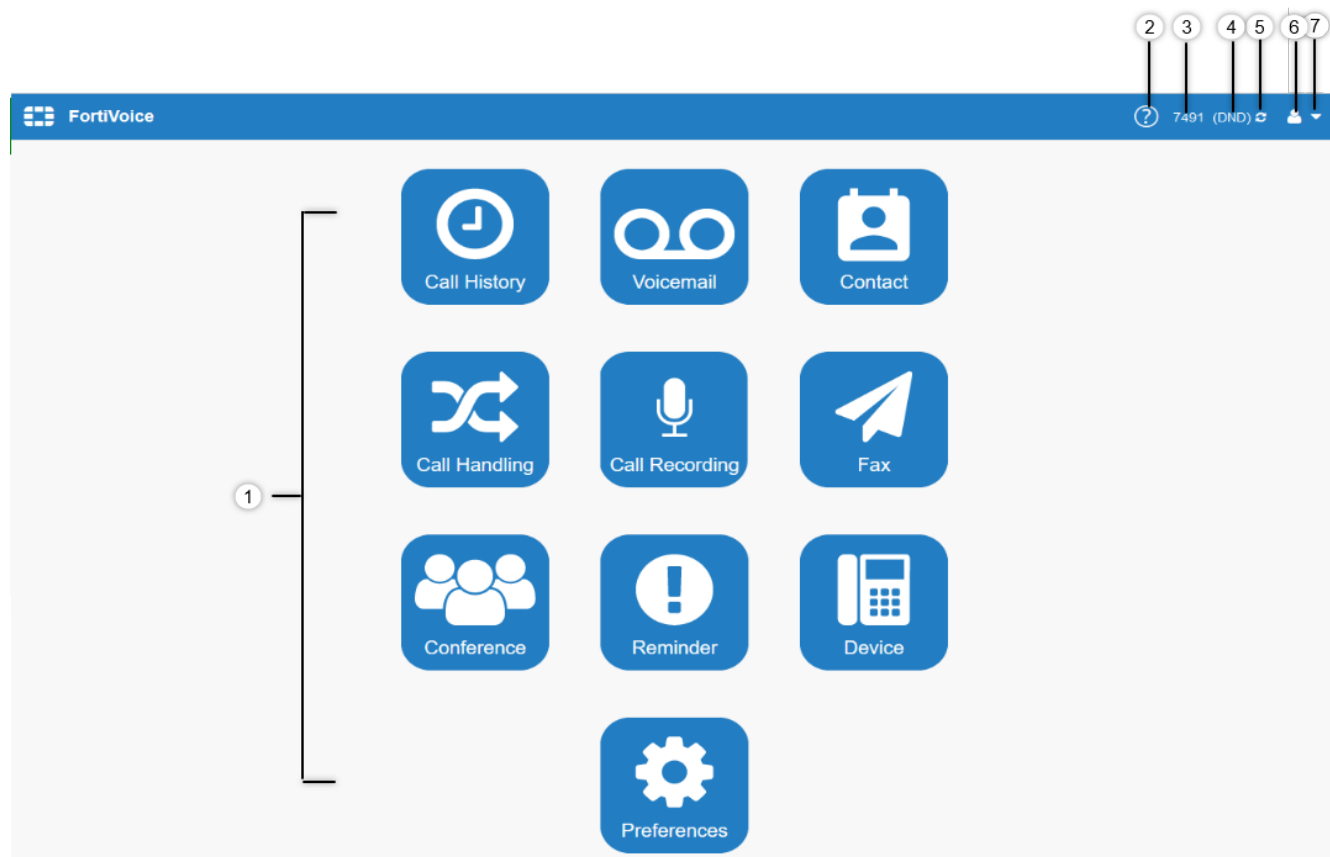


# Navigating the FortiVoice Cloud user portal

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

- [Main page overview on page 10](#)
- [Widget page example on page 11](#)

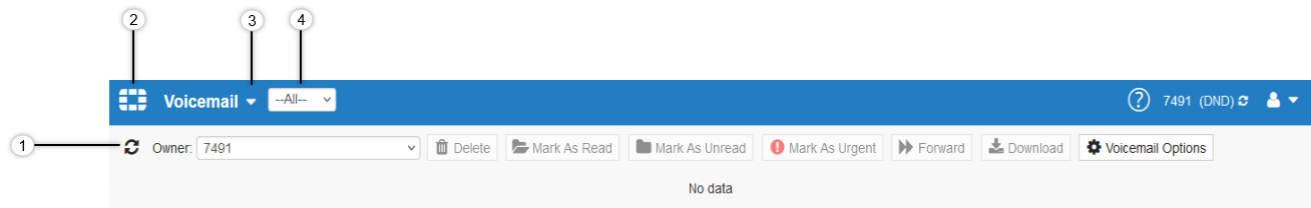
## Main page overview



No.	Description
1	The main menu gives you quick access to the widgets.

No.	Description
	To open a widget, click on the icon. <b>Note:</b> To see the <b>Conference</b> 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: <ul style="list-style-type: none"> <li>• DND (do not disturb)</li> <li>• In use</li> <li>• Not in use</li> <li>• Ringing</li> </ul>
6	To refresh the extension status.
7	To log out of the FortiVoice Cloud user portal, click the down arrow and click <b>Log Out</b> .

## 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.

# Call history

The **Call History** menu displays all incoming and outgoing calls made to and from your extension. Your phone call records include the following details:


- Caller and receiver
  - The FortiVoice Cloud administrator can enable the **Match personal contact** option. This option can affect the content in the **From (Name)** column of the **Call History**. With this option enabled, you can observe the following behavior: When an extension receives a phone call from a caller that already exists in the **Personal Contact** list, the **Call History** list will show the same ID (or caller ID) as the one used in the **Personal Contact** list.
- Time of the call
- Call duration
- Call status or disposition
- Call direction
- Call type

This section includes the following topics:

- [Calling a person on page 12](#)
- [Viewing call details on page 13](#)
- [Searching call records on page 14](#)
- [Filtering call records on page 14](#)
- [Downloading call records on page 15](#)
- [Adding a personal contact on page 15](#)
- [Blocking a phone number on page 16](#)

## Calling a person

You can use **Call History** to call a person that has called you or a person that you have called.

1. In **Call History**, locate the entry for the person that you want to call.
2. To initiate the call, click  beside the name.

# Viewing call details

1. In the call history list, double-click on an entry.
2. You can view the call information, detail information, and call flow. Here are section examples:

**Call Information** ▾

From: John Snow 8500

To: Juliet Higgins 7101

Start: 2021-02-12 13:27:52

Real duration: 00:00:07 (7 seconds)

Disposition: No Answer

**Detail Information** ▾

Answer: 2021-02-12 13:27:52

End: 2021-02-12 13:28:00

Source: 8500

Dialed number/DNIS: 7101

Destination:

Trunk:

Bill duration: 00:00:07 (7 seconds)

Direction: Internal



Department:

Unique ID: 1613165266.327

Call type: Voice


Account code:

**Call Flow** ▾

  Download 1-7 of 7 ▾ < >

Time	Description
13:27:46	dial local number:7101, device:PJSIP/7101
13:27:46	process call handling state:<NORMAL> for user:<7101>
13:27:46	dial local extension:PJSIP/7101, callee id:"Juliet Higgins" <7101>
13:27:52	call unsuccessful, status: NOANSWER
13:27:52	process call handling state:<NOANSWER> for user:<7101>
13:27:52	enter voicemail number:7101, device:7101@system
13:28:00	no message left to voicemail account 7101@system <7101>

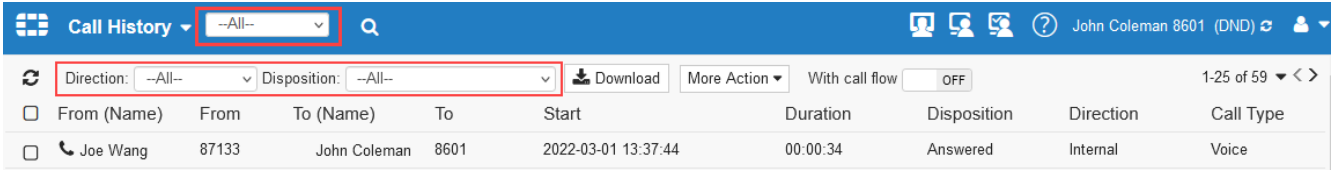
## Searching call records

1. In **Call History**, click **Search**.
2. Enter a search string.
3. If you do not want to configure search settings, press **Enter**.
4. If you want to configure search settings, click , make your selections, and click **Search**.

## Filtering call records

In **Call History**, you can filter call records by making selections in the following dropdown lists:

- By default, all calls are displayed in the list. However, you can filter by calls that were:
  - Missed
  - Received
  - Placed
- **Direction** has the following choices:
  - All
  - Internal
  - Outgoing
  - Incoming
- **Disposition** has the following choices:
  - Answered
  - Voicemail
  - No Answer
  - Busy
  - Failed
  - Denied
  - Transferred - Blind
  - Transferred - Attended
  - Other



The screenshot shows the 'Call History' interface. At the top, there is a search bar with a dropdown menu set to '--All--'. Below the search bar, there are two more dropdown menus: 'Direction: --All--' and 'Disposition: --All--', both highlighted with red boxes. To the right of these dropdowns are buttons for 'Download', 'More Action', and a toggle for 'With call flow' set to 'OFF'. On the far right, it shows '1-25 of 59' records. Below this is a table with the following columns: From (Name), From, To (Name), To, Start, Duration, Disposition, Direction, and Call Type. A single call record is visible:

From (Name)	From	To (Name)	To	Start	Duration	Disposition	Direction	Call Type
☐ Joe Wang	87133	John Coleman	8601	2022-03-01 13:37:44	00:00:34	Answered	Internal	Voice



Filtering the list affects which options you can access for downloading call detail records. For more information, see [Downloading call records on page 15](#).

## Downloading call records

### To download all call records

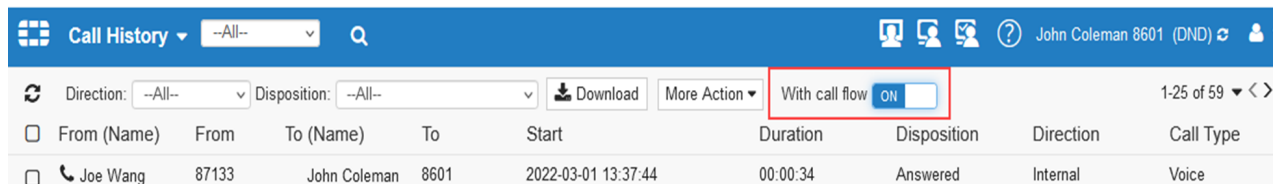


- Downloading all call records is available when **With call flow** is set to **OFF**.
- You may wish to apply filters from the dropdown lists **Direction** and **Disposition** before clicking **Download > All**, otherwise FortiVoice Cloud downloads the first 20,000 call records.

1. In **Call History**, click **Download > All**.
2. Depending on your web browser settings, the CSV file may download automatically or you can take action to save the file.
3. If the downloaded file shows pound (#) characters, expand the columns to display all the text.

### To download call records from a search

1. In **Call History**, click **Search**.
2. Enter a search string and press **Enter**.
3. If you want to download call records with their call flow, then set **With call flow** to **ON**.



- Downloading all call records or a selection of call records with detailed call flows takes time and can impact the performance of the system.
- FortiVoice Cloud downloads the first 20,000 records only.

4. Click **Download > Search Result**.
5. To confirm, click **OK**.
6. Depending on your web browser settings, the CSV file may download automatically or you can take action to save the file.
7. Open the downloaded file.
8. If the downloaded file shows pound (#) characters, expand the columns to display all the text.

## Adding a personal contact

In the call history, you can select a caller to create a new personal contact.

1. In **Call History**, select the caller that you want to add to your person contacts.
2. Select **More Action > Add to Contact**.
3. Add a unique **Display Name** and other details for this contact.
4. Click **Create**.
5. To verify that the contact is in the personal contact list, go to **Contact > Personal Contact**.

## Blocking a phone number

To prevent a caller from calling your extension, add the caller's phone number to the personal block list.

---



To be able to block phone numbers, the FortiVoice Cloud administrator must enable the functionality on FortiVoice Cloud.

---

1. In **Call History**, select the phone number that you want to block.
2. Select **More Action > Block**.
3. To confirm, click **Block**.
4. To verify that the phone number is in the block list, go to **Contact** and click **Personal Block List**.

# Voicemail

The **Voicemail** menu allows you to manage your voicemails.

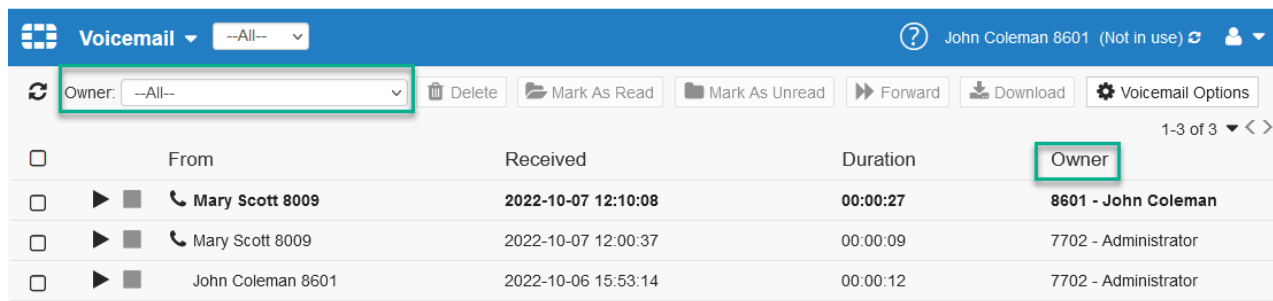
This section includes the following topics:

- [Displaying voicemails on page 17](#)
- [Playing a voicemail on page 18](#)
- [Deleting a voicemail on page 18](#)
- [Forwarding a voicemail to another extension on page 18](#)
- [Downloading a voicemail on page 19](#)
- [Setting voicemail options on page 19](#)

## 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 dropdown 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:




The screenshot shows the Voicemail interface. At the top, there is a blue header with the 'Voicemail' menu and a dropdown set to '--All--'. Below the header, there is a toolbar with icons for 'Delete', 'Mark As Read', 'Mark As Unread', 'Forward', 'Download', and 'Voicemail Options'. A table of voicemails is displayed below the toolbar. The table has columns for 'From', 'Received', 'Duration', and 'Owner'. The 'Owner' column is highlighted with a green box. The first row shows a voicemail from 'Mary Scott 8009' received on '2022-10-07 12:10:08' with a duration of '00:00:27' and owner '8601 - John Coleman'. The second row shows a voicemail from 'Mary Scott 8009' received on '2022-10-07 12:00:37' with a duration of '00:00:09' and owner '7702 - Administrator'. The third row shows a voicemail from 'John Coleman 8601' received on '2022-10-06 15:53:14' with a duration of '00:00:12' and owner '7702 - Administrator'.

	From	Received	Duration	Owner
<input type="checkbox"/>	<b>Mary Scott 8009</b>	<b>2022-10-07 12:10:08</b>	<b>00:00:27</b>	<b>8601 - John Coleman</b>
<input type="checkbox"/>	Mary Scott 8009	2022-10-07 12:00:37	00:00:09	7702 - Administrator
<input type="checkbox"/>	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** .

## Managing the status of voicemails


### To manage the status of voicemails

1. Go to **Voicemail**.
2. At the beginning of a row, select the checkbox for that voicemail.
3. Click one of the following buttons:
  - **Mark as Read**
  - **Mark as Unread**
  - **Mark as Urgent**

You can change the status as many times as you like.

You can also change the status of multiple voicemails at once by first selecting multiple voicemails.


## 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.

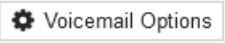
6. Click **OK**.

## 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 .
3. Configure the following fields:

GUI field	Description
<b>Voicemail handling</b>	Enable to allow a caller to press 0 to talk to the operator during an announcement.
<b>Name</b>	<ul style="list-style-type: none"> <li>• Set to <b>Standard</b> to use the system default name for the voicemail (the extension number), or set to <b>Personal</b> to use your own name for the voicemail.</li> <li>• If you select <b>Personal</b>, click <b>Call me</b> to record your own message using the phone, or click <b>Upload</b> to import an existing sound file that meets the requirements {WAVE file (.wav) in PCM format or MP3 file and with a maximum size of 10 MB}.</li> </ul>
<b>Greeting</b>	<p>Select the voicemail greeting mode and greeting content. Click <b>Audio file</b> to record or import a sound file for various scenarios, depending upon the greeting type selected:</p> <ul style="list-style-type: none"> <li>• <b>Standard</b>: The default system defined greeting.</li> <li>• <b>Simple</b>: The greeting that applies to any time.</li> <li>• <b>Scheduled</b>: The greeting that comes with a schedule. Click <b>New</b> to add a system <b>Schedule</b> and assign a <b>Greeting</b>.</li> </ul> <p>This option is only available if you administrator has assigned this privilege to your extension.</p>

GUI field	Description
	<ul style="list-style-type: none"><li>• <b>Conditional:</b> The greeting that applies when you are either busy or unavailable.</li></ul>

4. Click **OK**.

# Contact

The **Contact** menu displays all of the extensions in your organization, including the extension number, display name on the phone, location of the extension, and the extension type.

You can filter contacts by **Personal Contact**, **Business Contact**, or **Directory** from the top dropdown menu.

You can sort the **Personal Contact** list, by using the following filters:

- **Sort By:** Allows you to show contacts by display name or main number.
- **Category:** Allows you to show contacts for speed dial, favorite, or all.




You can update the **Personal Contact** list but the FortiVoice Cloud administrator manages the **Business Contact** and **Directory** lists.

---

This section includes the following topics:


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## Calling a contact

1. Go to **Contact**, and then the list that you want to access (**Personal Contact**, **Business Contact**, or **Directory**).
2. To initiate the call, click  beside the phone number.

## Adding a personal contact

Use this procedure to add a contact to **Personal Contact**.

1. Go to **Contact > Personal Contact**.
2. Click .




Make sure to fill in the **Main Number** field. This field is mandatory.


---

3. Fill in the fields.
4. Click **Create**.

## Editing a personal contact

1. Go to **Contact > Personal Contact**.
2. Select the checkbox at the beginning of the row for that contact, and then click .
3. Edit the contact details.
4. To save the changes, click **OK**.

## Deleting a personal contact

1. Go to **Contact > Personal Contact**.
2. Select the checkbox at the beginning of the row for that contact, and then click .
3. To confirm, click **Delete**.

## Importing a list of personal contacts

You can bulk import contacts in a comma-separated value (CSV) file.

You can edit the contacts after they are imported successfully.

### Before you begin

---



Each contact must have a **main number** otherwise the contact is not imported.


---

Each column in the CSV file can have the following headers which you map in this procedure to the new entries in the user portal:

- Main number (mandatory)
- Display name
- Mobile number
- Home number

- Email
- Description

**To import contacts**

1. Go to **Contact > Personal Contact**.
2. Click the three dots icon  and select **Import**.
3. Browse and open a CSV file for your contacts.
4. Click **Open**.



Wait for the CSV file to upload.  
When the file upload is complete, the **Import Contacts** dialog appears.


5. In the **Import Contacts** dialog, make the following settings:

Import setting	Description
<b>Delete all existing contacts before importing</b>	By default, the import is set to overwrite existing contacts. To retain existing contacts, switch this setting to <b>OFF</b> .
<b>Skip CSV first line</b>	By default, the import is set to skip the first line in the CSV file which may contain the headers. To include the first line in your import, switch this setting to <b>OFF</b> .
<b>Select Mapping Fields</b>	Select the relevant headers from the dropdown lists: <ul style="list-style-type: none"> <li>• <b>Main number</b> (mandatory)</li> <li>• <b>Display name</b></li> <li>• <b>Mobile number</b></li> <li>• <b>Home number</b></li> <li>• <b>Email</b></li> <li>• <b>Description</b></li> </ul>

6. Click **OK**.  
A notification displays to confirm how many records were imported out of the total number of records.  
Successfully imported contacts appear in your personal contacts list.

## Exporting a list of personal contacts



Use this procedure to export contacts from **Personal Contact** to a CSV file.

1. Go to **Contact > Personal Contact**.
2. Click  and select **Export**.

3. Depending on your web browser settings, the CSV file may download automatically or you can take action to save the file.


## Updating a personal contact favorite list

Use this procedure to add or delete a contact from your favorite list.

1. Go to **Contact > Personal Contact**.
2. To add a contact to a favorite list, click the star icon  next to the display name.
3. To remove a contact from a favorite list, click the star icon  next to the display name.
4. To show only favorites in the contact list, in **Category**, select **Favorite**.

## Updating a speed dial list of personal contacts

You can associate a phone number with a key pad number and create a contact speed dial list. Use this procedure to add or delete a number from a speed dial list.

1. Go to **Contact > Personal Contact**.
2. Next to the contact's number, click the down arrow .
3. To add a number to the speed dial list:
  - a. Select **Add to Speed Dial**.
  - b. To associate the phone number with a key pad number, click a number in the list.
  - c. Click **OK**.
4. To remove a number from the speed dial list, select **Remove from Speed Dial**.
5. To show only speed dial numbers in the contact list, in **Category**, select **Speed Dial**.

## Configuring a personal block list

Use this procedure to maintain a phone number block list to prevent those defined numbers from calling your extension.




To be able to block phone numbers, the FortiVoice Cloud administrator must enable the feature in the FortiVoice Cloud admin portal.

---

**To block a phone number (not included in the personal contact list)**

1. Go to **Contact > Personal Contact** and click **Personal Block List**.
2. Click **New**.
3. Enter a **Number**, and optionally a **Display name** and **Description**.
4. Click **Create**
5. To finish configuring your block list, click **Close**.

**To block a phone number (included in the personal contact list)**

1. Go to **Contact > Personal Contact**.
2. In the main number list, locate the number that you want to block.
3. Next to the contact's number, click the down arrow .
4. Select **Add to Block List**.
5. Optionally, add a **Description**.
6. To confirm, click **OK**.

# Call handling

The **Call Handling** menu allows you to manage the call process. For example, you can configure the process to forward a call to another number on a specific schedule.

This section includes the following topics:

- [Enabling the Do not disturb setting on page 26](#)
- [Enabling the Call forward setting on page 26](#)
- [Managing a call on page 26](#)
- [Configuring Quick call handling on page 29](#)
- [Configuring the Follow Me setting on page 29](#)
- [Configuring the Twinning setting on page 59](#)

## Enabling the Do not disturb setting

1. Go to **Call Handling**.
2. Under **Quick setting**, set **Do not disturb** to **ON**.

## Enabling the Call forward setting

1. Go to **Call Handling**.
2. Under **Quick setting**, set **Call forward** to **ON**.
3. In the field provided, enter the telephone number to forward the calls.

## Managing a call

1. Go to **Call Handling**.
2. Under **User's call handling**, select a call status from the dropdown menu. Your choices are:
  - Normal
  - No answer
  - Busy
  - Do not disturb
  - Phone not connected
  - Block list

- Voicemail

Each status can only be used for one call management configuration.

If you select **Block list**, the call management configuration will apply to the numbers added in the **Personal Block List** configuration. See [Configuring a personal block list on page 24](#).

3. Set **Call Process** to either **System default action** or **User defined**.

The **System default action** changes depending on the status selected. As shown in the example, a **Normal** status means the system default action is **Ring Phone**.

The screenshot shows the 'User's call handling' configuration page. At the top, there is a dropdown menu labeled 'User's call handling' with a downward arrow. Below this, there is a section titled 'Configure how to handle calls when in status:' with a dropdown menu set to 'Normal'. Underneath, there is a section titled 'Call Process' with two radio button options: 'System default action (Ring Phone)' (which is selected) and 'User defined'. Below the radio buttons are four buttons: '+ New...', 'Edit...', 'Move' (with a dropdown arrow), and 'Delete' (with a trash icon). At the bottom, there is a table with four columns: 'Schedule', 'Call from', 'Action', and 'Info'.

4. If you selected **User defined**, click **New** to define a call process according to a schedule.

- Select a default **Schedule** for the call action. Once a schedule is assigned, you can click **View** to display the schedule details.
- Select whether this call process applies to **Internal**, **External**, and/or **Office peer** calls.
- Select an **Action** for the call process. Multiple user defined call process actions can be defined to process a call in a specific sequence. For example, you can create one call process with a **Play announcement** action, followed by another with an **Auto attendant** action.

The **Default action** is the same as the system default action, determined by the call handling status.

- If you select **Follow me**, select a follow me profile. For information, see [Configuring the Follow Me setting on page 29](#).  
This option is only available if your administrator enables call forwarding in your extension's user privilege.
- If you select **Play announcement**, select a sound file. For information about configuring sound files, see [Customizing a sound file for an announcement on page 28](#).
- If you select **Auto attendant**, select a default auto attendant.
- If you select **Forward**, enter the number to which you want to forward the call. This option is available only if your administrator enables call forwarding in your extension's user privilege.
- Click **OK**.

5. Your call process actions are shown. If necessary, you can change the order of the actions by selecting an action's checkbox and clicking **Move > Up** or **Move > Down**.

**Call Process**

System default action (Ring Phone)  
 User defined

	Schedule		Action	Info
<input checked="" type="checkbox"/>	business_hour	↑ Up ↓ Down	Play announcement	welcome_default
<input type="checkbox"/>	business_hour		Auto attendant	auto_attendant_default

6. Click **OK**.

## Customizing a sound file for an announcement

When configuring user-defined **Call Process** settings under **Call Handling**, you have the option to set the **Action** to **Play announcement**. You must then assign a sound file to play, or create one.

For more information about the call process configuration, see [Call handling on page 26](#).

### Sound file requirements



Make sure that the files meet the following requirements:

Supported formats:

- MP3
- WAV

File size:

For an announcement sound file, the maximum size is 5 MB.

### To customize a sound file

1. Go to either **Call Handling > User's call handling** or **Call Handling > Quick call handling**.



**Quick call handling** is used to determine the call process for when your status is either **Out of office** or **Away**, or for another reason (**Other**).

2. In **Call Process**, select **User defined**, and then click **New**.
3. Assign a **Schedule** as necessary, and determine whether this call process applies to **Internal**, **External**, and/or **Office peer** calls.
4. Set **Action** to **Play announcement**.  
An **Announcement** dropdown list appears.

5. Click **New** (the plus + icon) next to the dropdown list.
6. Enter a **Name** for the sound file.
7. To record your own announcement:
  - a. Set **Action** to **Call me**.  
A message appears stating that a voice recording request (or call) has been sent to your extension.
  - b. Answer the call and record your announcement using the phone.
  - c. Click **Yes** when you have finished recording your announcement.
  - d. Click **Close**.
8. To import a preexisting audio file:
  - a. Set **Action** to **Upload**.
  - b. Locate and select the sound file.
  - c. Click **Open**.
  - d. Click **Close**.
9. To finish the call process configuration, click **OK**.
10. To save the call handling changes, click **OK**.

## Configuring Quick call handling

Use Quick call handling to change your call handling settings temporarily while leaving your regular call handling settings unchanged. The quick call handling settings are tied to the settings under **Preferences > Quick Mode** (see [Preferences on page 56](#)).

You can manage Quick call handling by dialing a code to enter into a default mode and configure the call process for when your status is either **Out of office** or **Away**, or for another reason (**Other**).

### To configure Quick call handling

1. Go to **Call Handling**.
2. Under **Quick call handling**, select a call status from the dropdown menu. Each status can only be used for one call management configuration.
3. Under **Call Process**, click **New** to define a call process according to a schedule.
  - Select a default **Schedule** for the call action. Once a schedule is assigned, you can click **View** to display the schedule details.
  - Select whether this call process applies to **Internal**, **External**, and/or **Office peer** calls.
  - Select an **Action** for the call process. Multiple call process actions can be defined to process a call in a specific sequence.
  - Click **OK**.
4. Click **OK**.

## Configuring the Follow Me setting

This feature allows a call to your extension to be transferred to another destination when you are not available.

**To configure follow me**

1. Go to **Call Handling**.
2. Under **Follow Me Setting**, click **New**.
3. Enter a **Name**.
4. Under **Follow Me Numbers**, click **New** to enter a phone number to which the call to your extension can be transferred.  
Additionally, define the **Ring duration** in seconds. This setting defines how long to ring the Follow Me number before following the No Answer call handling setting of the extension. Click **OK**.
5. Click **OK**.  
Repeat the steps to add more numbers if you want to transfer a follow me call to multiple numbers in a sequence. The numbers will be dialed according to the sequence in the follow me setting.
6. To save **Call Handling** 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 **Deactivated**.
    - **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 phone on page 50](#).

# 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 on page 31](#)
- [Managing recorded calls on page 32](#)

## Recording a phone call

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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 on page 33](#)
- [Sending a fax on page 33](#)
- [Viewing a fax sent from your extension on page 34](#)
- [Adding a fax cover page on page 34](#)
- [Monitoring a fax extension on page 35](#)

## 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
<b>To</b>	Enter the fax number to which you want to send the fax.
<b>Cover sheet type</b>	<p><b>Uploaded:</b> Select this option to attach a cover sheet and update the next field (Attach cover sheet).</p> <p><b>Dynamic:</b> Select this option to add details without attaching a cover sheet and configure the following fields:</p> <ul style="list-style-type: none"><li>• <b>From:</b> Enter your name.</li><li>• <b>Email:</b> Enter your email address.</li><li>• <b>Subject:</b> Enter the subject of this fax.</li><li>• <b>Company:</b> Enter the business name.</li><li>• <b>Comments:</b> Optionally, enter a description.</li></ul>

GUI field	Description
<b>Attach cover sheet</b>	Select a cover sheet. For details, see <a href="#">Adding a fax cover page on page 34</a> .
<b>Attachment (PDF and JPEG only)</b>	Click the plus (+) icon to locate the fax that you want to send as either a PDF or JPEG attachment.
<b>Advanced</b>	
<b>Fax header</b>	Enter the fax header such as the receiver's name, subject, or number of pages.
<b>Station ID</b>	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 33](#).

### 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 33](#).

## 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 36](#)
- [Adding a conference call event on page 37](#)
- [Adding a conference announcement on page 38](#)

## 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 three 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
<b>Title</b>	Add a title for the conference call event. This field is mandatory.
<b>Conference ID</b>	The ID associated with the conference call. This field is read-only.
<b>Attendee PIN</b>	The PIN that an attendee must enter to join the conference call. You can use the one generated by the system or change it.
<b>Organizer PIN</b>	The PIN that you must enter to host a conference call. Select one of the following options: <ul style="list-style-type: none"> <li>• <b>Use voicemail PIN</b> - This code is also used to access your voicemail messages.</li> <li>• <b>Use personal code</b> - This code is also used to access restricted calls.</li> <li>• <b>Specific</b> - You can use the suggested code or specify your own code.</li> </ul>
<b>Description</b>	Optionally, add details about this conference call event.
<b>Location</b>	Optionally, add information about the location of this conference call event.
<b>Start time</b>	<div style="text-align: center;">  </div> <p>Both start and end times use the time zone setting available in Preferences &gt; Display Preference.</p> <hr/> <p>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 <b>All day event</b> below.</p>
<b>End time</b>	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 <b>All day event</b> below.
<b>All day event</b>	Enable if the duration of the conference call will be an entire day.
<b>Recurrence</b>	If you want the conference call event to be on a repeating schedule, click <b>None</b> , update the recurrence settings, and click <b>OK</b> .

GUI field	Description
Attendee	 <p>For details about the attendee limit for user conferencing, see <a href="#">Specifications for conference call events on page 36</a>.</p> <hr/> <ol style="list-style-type: none"> <li>1. Click <b>Add Attendee</b>.</li> <li>2. Add an email and a display name, and click <b>Create</b>.</li> <li>3. Repeat steps 1 and 2 for every attendee.</li> </ol>

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 - [redacted]@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 - '[redacted]@fortinet.com' Simon - '[redacted]@bell.net'
Description:	

Attending? [Accept](#) - [Tentative](#) - [Reject](#)

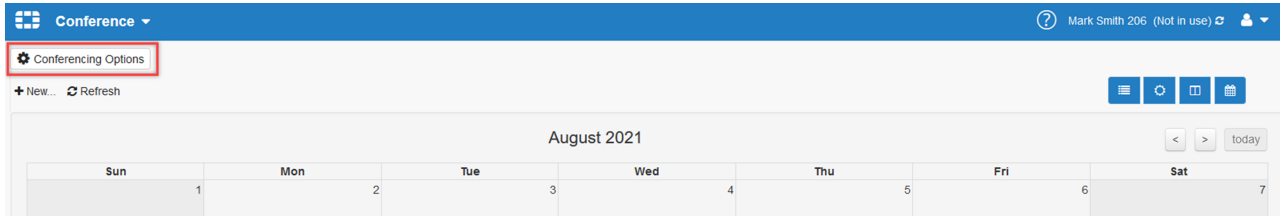
## Adding a conference announcement



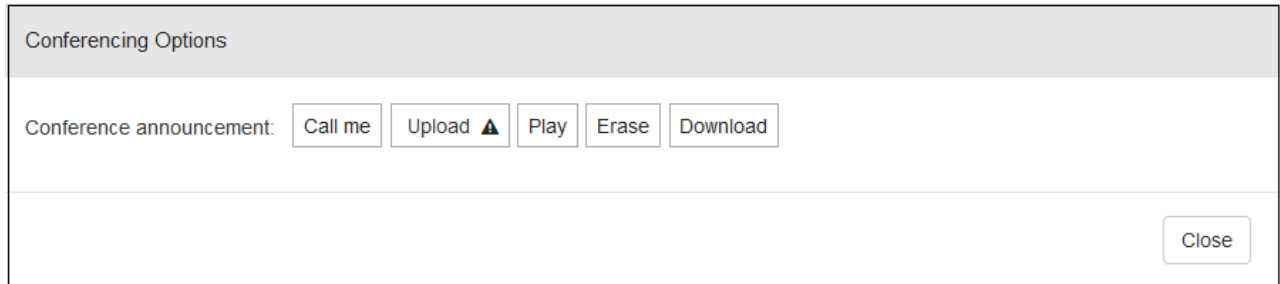
To have access to **Conference**, your FortiVoice Cloud administrator must update FortiVoice Cloud (Call Feature > Conferencing > User Conferencing > Users) to give your extension the privilege to organize conference calls.

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**.

# Reminder



The FortiVoice administrator must enable the **Reminder** feature for the user portal.

---

The **Reminder** menu allows you to add a reminder event in your calendar and set the extensions to which you want to send the event reminder calls.

---



Sound files for audio reminders must be WAV files in PCM format.  
The maximum file size is 5 MB.

---

This section contains the following topics:

- [To view calendar reminders on page 40](#)
- [To view calendar reminders on page 40](#)
- [To copy an existing reminder on page 41](#)
- [To edit a reminder on page 41](#)
- [To delete a reminder on page 42](#)

## To view calendar reminders


You can change how you view the calendar by clicking the following icons in the top-right of the page:

- Agenda—displays a list of your calendar events for today's date in the format of a daily agenda
- Day—displays the calendar view for today's date
- Week—displays the calendar view for the current calendar week
- Month—displays the calendar view for the current calendar month

## To add a calendar reminder

1. Go to **Reminder**.
2. In the calendar, click **New**.
3. Complete the following fields:

GUI field	Description
<b>Title</b>	Add a name for the reminder event.
<b>Description</b>	Optionally, add a description for the reminder event.
<b>Location</b>	Optionally, add a location for the reminder event.

GUI field	Description
<b>Start time</b>	 <p>The start time uses the time zone setting available in <b>Preferences &gt; Display Preference</b>.</p> <hr/> <p>Specify when the reminder event starts.</p>
<b>Recurrence</b>	<p>If you want the reminder event to be on a repeating schedule, click <b>None</b>, update the settings, and click <b>OK</b>.</p>
<b>Guest</b>	<p>From the available and external lists, make your selections and click the arrow right icon (&gt;) to update the selected list. Guests in the selected list will receive your reminder event.</p>
<b>Reminder audio</b>	<p>To send a reminder audio to the selected guest phones, select one of the following options:</p> <p><b>Default:</b> Select to send a beep sound as the reminder audio. To hear the beep sound, click <b>Play</b>, and save the GSM file.</p> <p><b>Customized:</b> Select to customize the reminder audio.</p> <ol style="list-style-type: none"> <li>1. Click <b>Create New</b>.</li> <li>2. You have two options to create a customized message: <ul style="list-style-type: none"> <li>• To create a new message, select an extension and click <b>Call me</b>. Follow the prompts.</li> <li>• Upload a prerecorded message. <ol style="list-style-type: none"> <li>i. Click <b>Upload</b>.</li> <li>ii. Select an audio file from your local machine.</li> <li>iii. Click <b>Open</b>.</li> </ol> </li> </ul> </li> <li>3. Click <b>Close</b>.</li> </ol>

4. To save the reminder event, click **OK**.

### To copy an existing reminder

1. Go to **Reminder**.
2. Click the reminder event in the calendar that you want to copy.
3. Click **Copy**.
4. Click **Close**.
5. Click **New**.
6. Click **Paste**.
7. Make any changes in the pasted reminder event.
8. Click **OK**.

### To edit a reminder



You can edit your own reminders but you cannot edit reminders set by other people or the system.

1. Go to **Reminder**.
2. Click the reminder event in the calendar.
3. Make the changes.
4. Click **OK**.

**To delete a reminder**

1. Go to **Reminder**.
2. Click the reminder event in the calendar that you want to delete.
3. Click **Delete**.
4. In the popup, click **OK**.

# Device

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

This section includes the following topics:

- [Registering your devices using a phone activation email on page 43](#)
- [Registering your FortiFone Softclient for mobile on page 45](#)
- [Registering your FortiFone Softclient for desktop on page 48](#)
- [Registering your FortiFone phone on page 50](#)
- [Customizing programmable keys on your FortiFone phone on page 50](#)
- [Displaying FortiFone phone details on page 54](#)
- [Displaying FortiFone Softclient details on page 54](#)
- [Revoking a FortiFone Softclient license on page 55](#)

## Registering your devices using a phone activation email

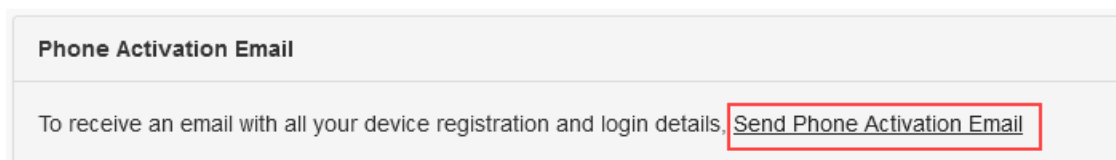
Use the welcome email from your FortiVoice Cloud administrator to register your devices. If you no longer have that welcome email, use this procedure to send the phone activation email to your email address.

### Before you begin

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**.



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:
  - 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:

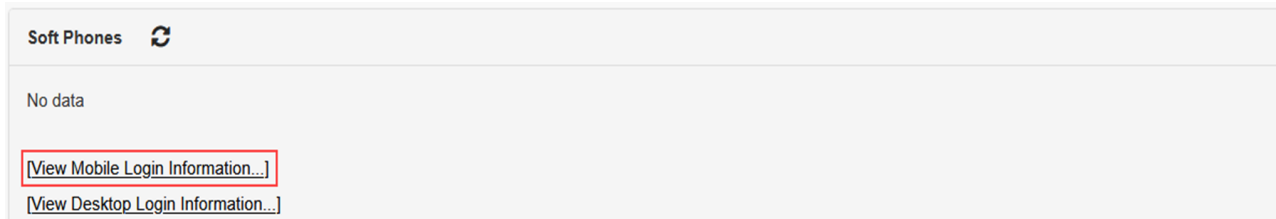
- [Automatically register](#) your FortiFone Softclient for mobile account using a QR code.
- [Manually register](#) your FortiFone Softclient for mobile account.

## 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**.

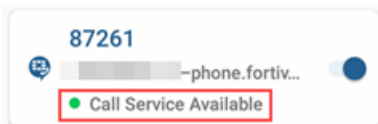





The generated QR code expires in 24 hours, however, you can generate a new one.

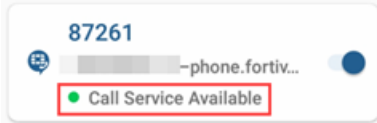
The web browser displays the QR code and login details. Here is an example:



3. If you are a first time user:
  - a. In 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.  
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**.



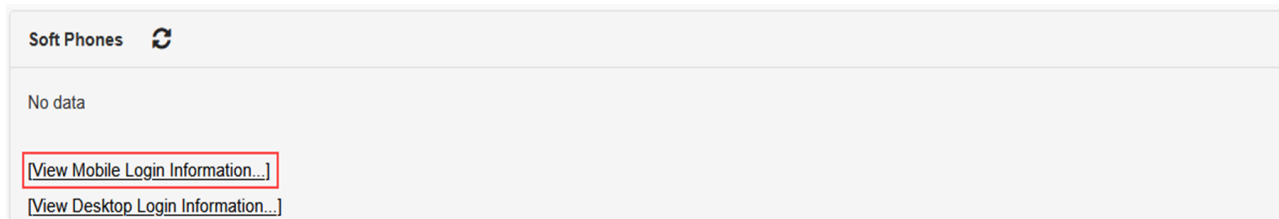
4. If you skipped the initial setup or you are a current user and want to add an additional account:
  - a. In FortiFone Softclient on your mobile phone, tap .
  - b. Tap **Account**.
  - c. Tap  (on Android) or  (on iOS).
  - d. Tap **Scan QR Code**.
  - e. Point your mobile camera at the PC screen displaying the QR code. Make sure that the QR code appears clearly on the screen of your mobile device.  
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**.



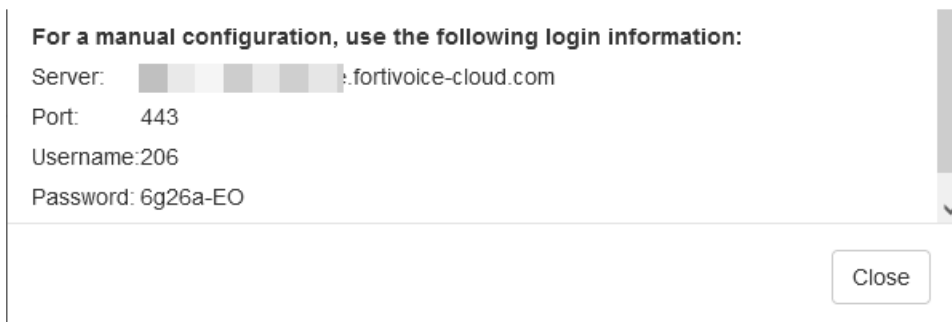
5. For details about using the FortiFone Softclient for mobile, see the document for your platform:
  - [FortiFone Softclient for Android User Guide](#)
  - [FortiFone Softclient for iOS User Guide](#)

## 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**.

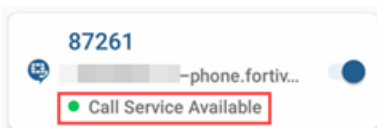


The web browser displays the login details. Here is an example:




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 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.

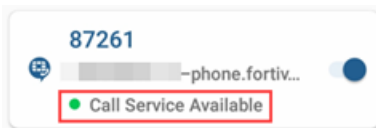
f. Enter the **Server**.

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 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

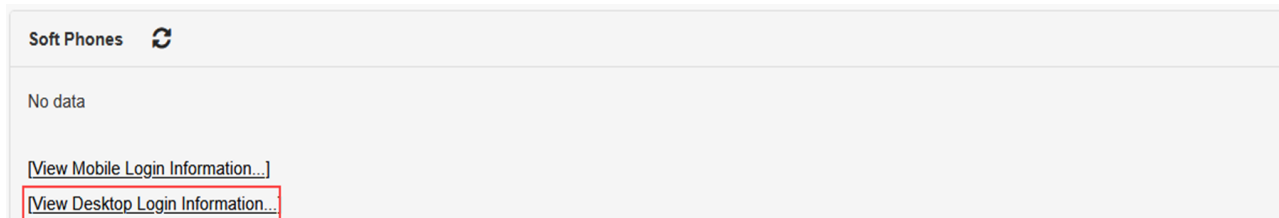
If you are not using the [activation email](#) to register your device, then you can alternatively manually register your FortiFone Softclient for desktop account.

### 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 59](#).

### 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**.



- The user portal displays the configuration details. Leave the dialog open. Here is an example:

Configuration

**Use this information to configure and log into your desktop softclient account:**

Server:

Port:

Username:

Password:

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

FortiVoice Login

9000

Remember me [Forgot password?](#)

[< Back](#)

- Click **Login**.  
After FortiFone Softclient establishes a connection with FortiVoice Cloud, the UI opens.
- You can now start using FortiFone Softclient for desktop. For details, see the [FortiFone Softclient for Desktop User Guide](#).

# Registering your FortiFone phone

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

## Before you begin

Connect the phone.

For more information, 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](#)
- [FON-W80B Quick Start Guide](#)

## To register your FortiFone 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, however, you can generate a new one.

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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. Follow the procedure **Registering with FortiVoice Cloud** in the appropriate User Guide.

### See more

- [FON-x80/x80B Series User Guide](#)
- [FON-W80B User Guide](#)

# Customizing programmable keys on your FortiFone 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. 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 52](#).


- 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
DTMF	Dual-tone multi-frequency (DTMF) refers to the touch tone digits on the keypad of your desk phone. When you are on a call and you press the DTMF key, the system dials the configured DTMF digits.	Enter the DTMF digits to dial when you press this programmable key on your phone.	Edit the label or keep the default label (DTMF).
	 The DTMF function is only available during a call.		
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).

Function	Description	Resource	Label
Extension appearance	<p>Allows you to perform the following actions:</p> <ul style="list-style-type: none"> <li>Monitor the status of the selected extension (idle, ringing, in use, DND, and on hold).</li> <li>On FON-x80/x80B series and FON-780B phones: Transfer a call to the selected extension. The FortiVoice Cloud administrator configures this setting as one of the following transfer types: <ul style="list-style-type: none"> <li>Blind: Allows you to transfer a call without talking to the person receiving the transfer.</li> <li>Attended: Allows you to announce the call to the person receiving the transfer and then complete the transfer.</li> </ul> </li> </ul>	Select an extension from the list.	Edit the label or keep the one associated with the selected extension.
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).
Shared Line appearance	For more information, see <b>Appendix A</b> in the <a href="#">FortiVoice Cloud Advanced Administration Guide</a> .		
Record	Allows you to record a phone call.	Stays blank.	Stays blank to use the Record label.
	 <p>The Record function is only available if the FortiVoice Cloud administrator has applied a profile with personal recording enabled to your extension.</p>		
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).
Reserved for line	<p>By default, FortiVoice Cloud reserves the first two programmable keys for lines on the phone so you can monitor your own calls on those lines.</p> <p>If your phone has additional lines, then you can use the Reserved for line function to program the appearance of those lines.</p>	If multiple accounts have been configured on this extension, choose which account to monitor.	Edit the label or keep the one associated with the selected line (or account).

Function	Description	Resource	Label
Twinning	 <p>Before using the Twinning function make sure that:</p> <ul style="list-style-type: none"> <li>The FortiVoice Cloud administrator has selected Twinning in a user privilege profile and applied that profile to your extension.</li> <li>You configure the twinning function in <b>Preferences</b> (see <a href="#">Configuring the Twinning setting on page 59</a>).</li> </ul>		
	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).
Speed dial	Places a call to the specified extension or phone number.	Enter an extension or a phone number.	Edit the label or keep the default (Speed dial).
Private Hold	Allows you to put a call on hold.	Stays blank.	Stays blank to use the Private Hold label.

## Displaying FortiFone phone details

You can display details about your registered FortiFone phones.

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

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 <input type="button" value="Generate"/>					


### See also

[Registering your FortiFone phone on page 50](#)

## 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:

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 FortiFone Softclient for Android or iOS, click **View Mobile Login Information**.
4. To display the login information of FortiFone Softclient for desktop, click **View Desktop Login Information**.


**See also:**

- [Registering your FortiFone Softclient for mobile on page 45](#)
- [Registering your FortiFone Softclient for desktop on page 48](#)

## 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 .

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 56](#)
- [Customizing display preferences on page 57](#)
- [Customizing programmable keys on your FortiFone desk phone on page 58](#)
- [Customizing incoming calls preferences on page 58](#)
- [Customizing quick modes on page 58](#)
- [Customizing notification options on page 59](#)
- [Configuring the Twinning setting on page 59](#)

## Customizing user settings

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

GUI field	Description																											
<b>Number</b>	Displays your extension number (read-only).																											
<b>Display name</b>	Displays the caller ID on the extension, usually the name of the extension user (read-only).																											
<b>Access Level</b>	There are three user access levels with associated features as following: <table border="1"><thead><tr><th rowspan="2">Features</th><th colspan="3">Access Level</th></tr><tr><th>Basic</th><th>Standard</th><th>Premium</th></tr></thead><tbody><tr><td>Configuration</td><td>No</td><td>Yes</td><td>Yes</td></tr><tr><td>Contacts and Click to dial</td><td>No</td><td>Yes</td><td>Yes</td></tr><tr><td>Console (appearance)</td><td>No</td><td>No</td><td>Yes</td></tr><tr><td>Call center console</td><td>No</td><td>No</td><td>No</td></tr><tr><td>Faxing</td><td>No</td><td>Yes</td><td>Yes</td></tr></tbody></table>	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
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
<b>Picture</b>	<p>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.</p> <p>Before uploading a picture file, make sure that the file meets the following requirements:</p> <ul style="list-style-type: none"> <li>• Supported formats: JPEG and PNG</li> <li>• Width and height ratio: between 0.85 and 1.2</li> <li>• File size: 5 MB or less</li> </ul> <p>To upload a picture, click .</p> <p>To delete a picture, click .</p>
<b>Change Voicemail PIN</b>	Click to enter and confirm a new PIN for accessing your voicemail.
<b>Change User Password</b>	<div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;">  <p><b>Change User Password</b> is available when your FortiVoice Cloud administrator has set your extension with a local authentication type for web access.</p> </div> <p>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.</p>

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
<b>Phone language</b>	Set the phone language for the extension.
<b>Web language</b>	Set the user portal language. The default is <b>English</b> .
<b>Theme</b>	Set the display color theme for the user portal. The default is <b>Green</b> .
<b>Time zone</b>	Set the time zone for the user portal. The default is <b>GMT -8:00 Pacific Time US &amp; Canada</b> .

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

# Customizing programmable keys on your FortiFone desk phone

For details, see the [Customizing programmable keys on your FortiFone phone on page 50 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 <b>Out of office</b> 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 <b>Away schedule</b> , dial *722 on your phone.

GUI field	Description
	To modify the option and time settings for this quick mode, click the underlined text.
*723	To enable the <b>Other schedule</b> , 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
<b>Voicemail</b>	Select the email notification option to use when this extension receives a voicemail: <ul style="list-style-type: none"> <li>• <b>None</b>: Do not send a notification.</li> <li>• <b>Simple</b>: Send an email notification.</li> <li>• <b>With attachment</b>: Send an email notification with the voicemail attached.</li> </ul>
<b>Missed call</b>	Enable to send an email notification when you miss an incoming call.
<b>Email address</b>	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 **Deactivated**.
    - **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 phone on page 50](#).



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