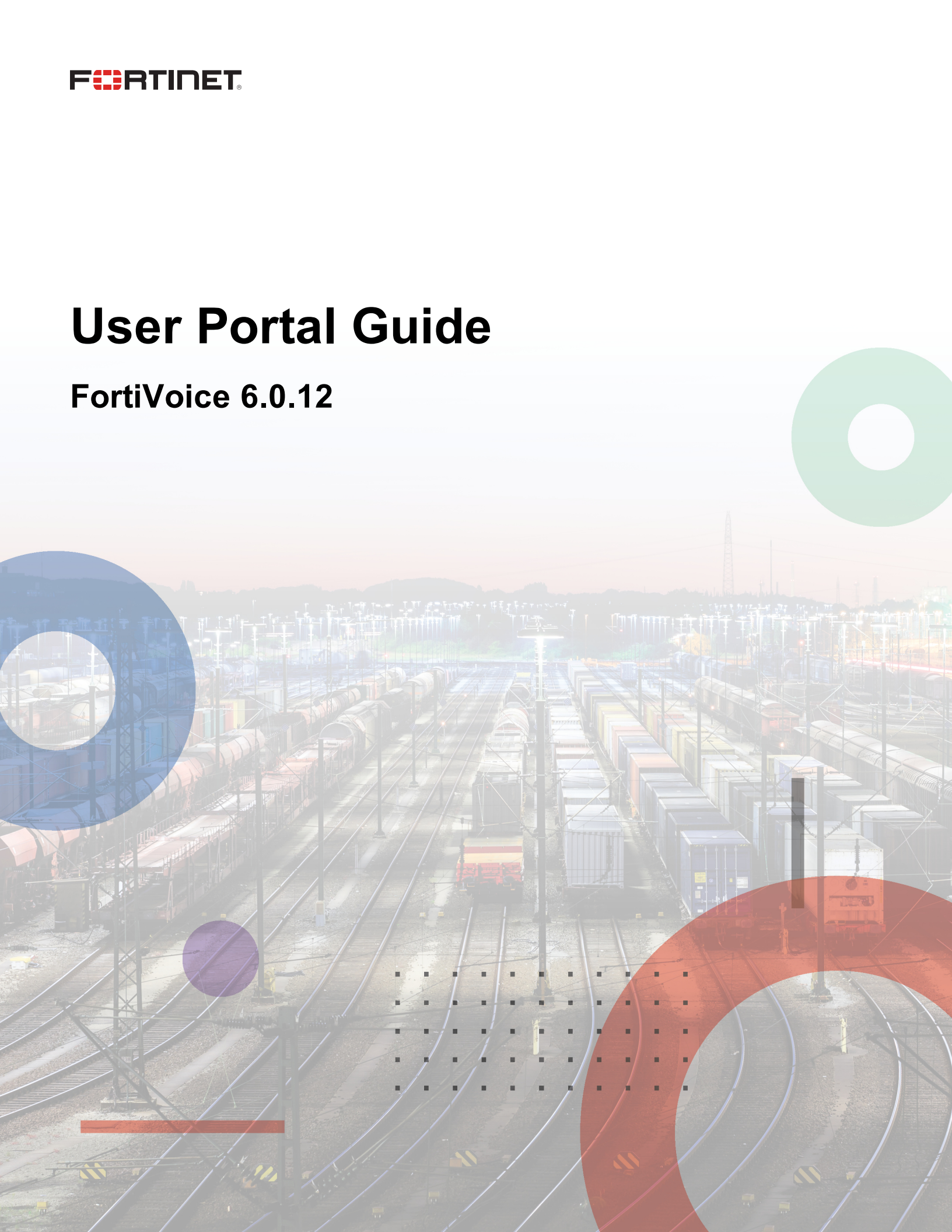


User Portal Guide

FortiVoice 6.0.12



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March 10, 2023

FortiVoice 6.0.12 User Portal Guide

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Change log

Date	Change description
2023-02-23	Initial release of the FortiVoice 6.0.12 User Portal Guide.

Introduction

When you have a phone extension on the FortiVoice phone system, the web-based FortiVoice user portal 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 recorded calls.
- Receive and send faxes.
- Set up reminder events and invite guests.
- Add user conference call events in your calendar and invite attendees by email.
- View device details of desk phones and soft phones.
- Set up programmable keys for your desk phone.
- Configure your extension according to your preferences.
- Use the Operator console to process organization calls.
- Use the Call center console to process call queues.



Available functions may vary depending on the privileges assigned to your phone extension by your FortiVoice system administrator.

Logging in and logging out of the FortiVoice user portal

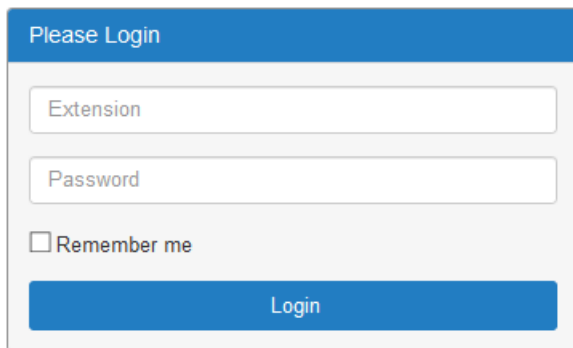
Before you begin

- After completing the configuration of your extension on the FortiVoice phone system, the system administrator can share details about your account. Take note of the FortiVoice user portal link, your phone extension on FortiVoice and the user password for web access. You will need those details to log in to the FortiVoice user portal.
- Use one of the recommended web browsers:
 - Google Chrome version 110
 - Microsoft Edge version 110
 - Mozilla Firefox Standard Release version 110
 - Apple Safari version 16

To log in to the FortiVoice user portal

1. Open a web browser and go to `https://<IP_address_or_FQDN>/voice`.
Where <IP_address_or_FQDN> is the IP address or the FQDN of the FortiVoice phone system.
If the FortiVoice system administrator has changed the access port, then you must also include the port. For example: `https://<IP_address_or_FQDN>:446/voice`.

The web browser prompts you to log in:



By default, if 3 failed login attempts occur within 3 minutes, you're temporarily blocked from logging in to the FortiVoice user portal. You need to wait for 3 minutes before you can try to log in again.

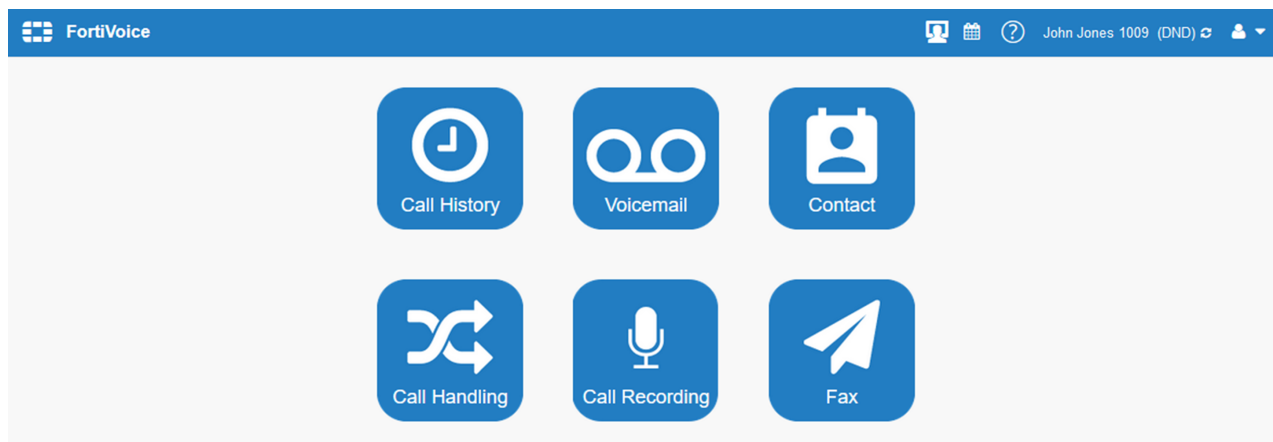
However, your system administrator can set the login blocking period on the FortiVoice Phone System (**Security > Intrusion Detection > Setting**).

2. In **Extension**, enter your extension.
3. In **Password**, enter the user password for your extension.
4. If you want the user portal to remember your extension and password and use them the next time you log in, click **Remember me**.
5. Click **Login**.

The main page of the FortiVoice user portal appears.

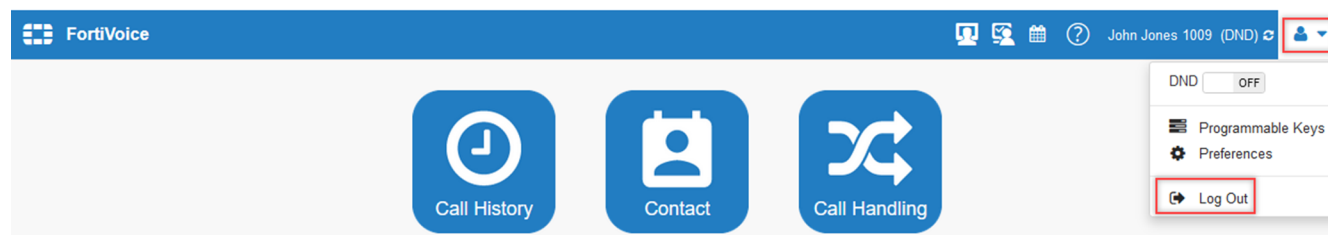


The widget selection may vary depending on the privileges that the FortiVoice system administrator has assigned to your extension.



To log out of the FortiVoice user portal

1. Click the account icon.
2. Click **Log Out**.

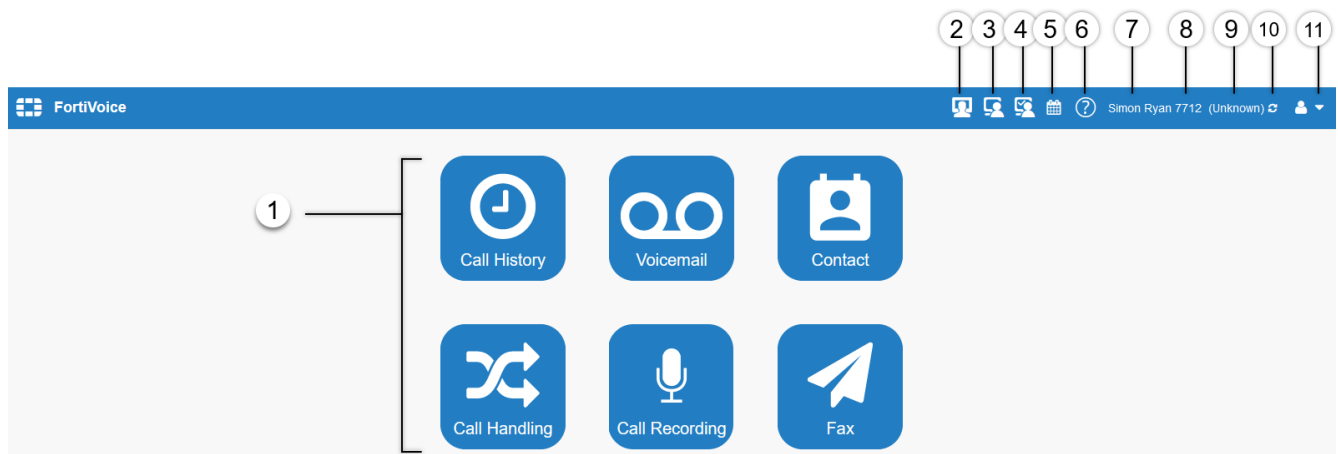


Navigating the FortiVoice user portal

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

- [Main page overview on page 10](#)
- [Widget page example on page 11](#)
- [Calendar page example \(monthly format\) on page 12](#)

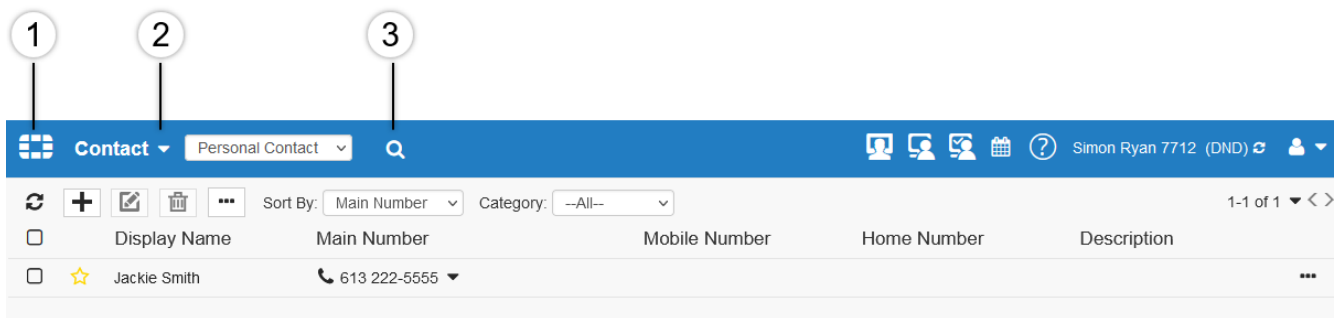
Main page overview



No.	Description
1	The main page gives you quick access to the widgets. To open a widget, click on the icon.
2	To access the operator console. For more details, see Operator console on page 50 .
3	To access the monitor view. For details, see Monitor view on page 73 .
4	To access the call center console. For more details, see Call center console on page 56 .
5	To access the calendar. For more details, see Calendar page example (monthly format) on page 12 .
6	To access the FortiVoice user portal documentation in HTML and PDF formats.
7	The display name associated with your extension.
8	Your extension number.

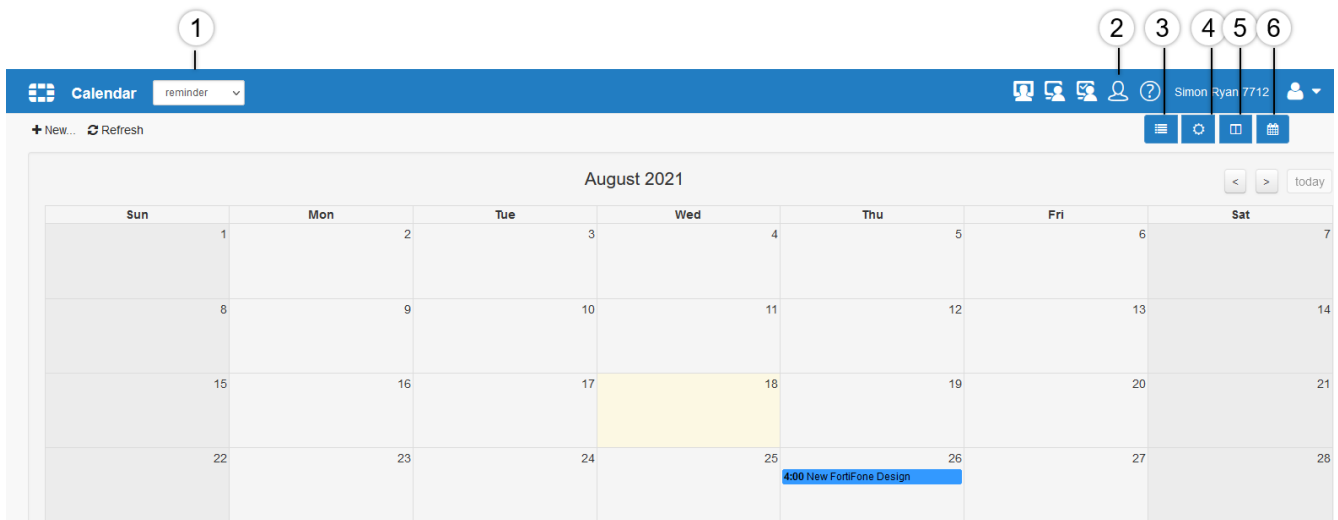
No.	Description
9	The status of your extension such as: <ul style="list-style-type: none"> • DND (do not disturb) • In use • Not in use • Ringing • Unknown
10	To refresh the status of your extension.
11	To log out of the FortiVoice user portal, click the down arrow and click Log Out .

Widget page example



No.	Description
1	To return directly to the main page, click the Fortinet icon.
2	To select another widget without going to the main page, click the down arrow and select the widget.
3	To access the search function.

Calendar page example (monthly format)



No.	Description
1	To select the reminder or conference function. <i>Note:</i> To have access to the conference function, the FortiVoice system administrator must give you the privilege to organize conference calls.
2	To return to the main page of the user portal.
3	To view the calendar items in an agenda format.
4	To view the calendar items in a daily format.
5	To view the calendar items in a weekly format.
6	To view the calendar items in a monthly format.

See also:

- [Conference on page 32](#)
- [Reminder on page 37](#)

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

Calling a person

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

1. In **Call History**, locate the entry of 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, detailed information, and call flow. Here are section examples:

User portal

Call Information ▾

From: Softclient 1005

To: 16133029384

Start: 2021-04-20 10:47:29

Duration: 00:00:19 (19 seconds)

Disposition: Answered

Detail Information ▾

Answer: 2021-04-20 10:47:37

End: 2021-04-20 10:47:48

Source: 1005

Dialed number/DNIS: 16133029384

Destination: 16133029384

Trunk: FortiCall

Usage duration: 00:00:10 (10 seconds)

Direction: Outgoing

Department:

Unique ID: 1618930049.33

Call type: Voice



Account code:

Call Flow ▾

🔄 Download 1-5 of 5 ▾ < >

Time	Description
10:47:29	match outbound dialplan:outgoing_default, dialed number:16133029384
10:47:29	dial number 16133029384 via trunk trunk_FortiCall with caller id "Softclient" <0000000>
10:47:37	call answered by , "" <>
10:47:48	call hangup by callee, status:NORMAL
10:47:48	call hangup by caller, status:

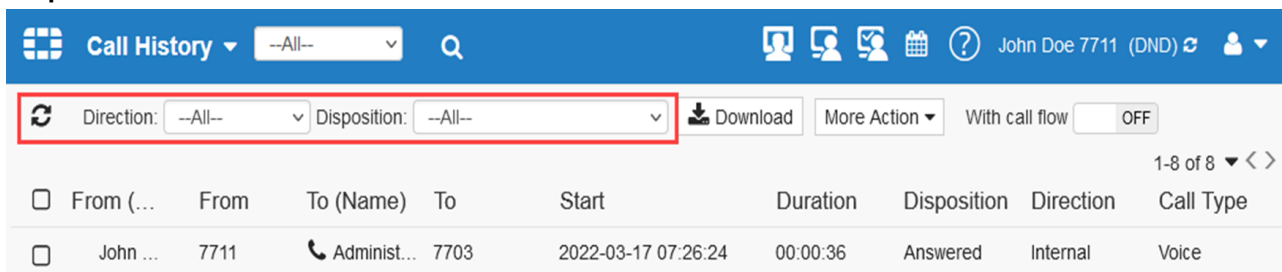
Searching call records

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 apply additional filtering by selecting options available under the following drop-down menus:

- **Direction**
- **Disposition**



Call History ▾ --All-- ▾ 🔍

🔄 Direction: --All-- ▾ Disposition: --All-- ▾ Download More Action ▾ With call flow OFF

1-8 of 8 ▾ < >

<input type="checkbox"/>	From (...)	From	To (Name)	To	Start	Duration	Disposition	Direction	Call Type
<input type="checkbox"/>	John ...	7711	Administ...	7703	2022-03-17 07:26:24	00:00:36	Answered	Internal	Voice


Downloading call records

You can save call records (all or from a search result) to a CSV file.

To download all 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. Open the downloaded file.
4. If the downloaded file shows # 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**.



Downloading call records with detailed call flows takes time and can impact the performance of the system.

The system can download the first 20,000 records only.

3. If you want to download call records with their call flow, then set **With call flow** to **On**.

The screenshot shows the 'Call History' interface. At the top, there is a blue header with 'Call History' and a search icon. Below the header, there are filters for 'Direction' and 'Disposition', both set to '--All--'. There are buttons for 'Download' and 'More Action'. A red box highlights the 'With call flow' toggle, which is currently set to 'ON'. Below the filters, there is a table with columns: 'From (...)', 'From', 'To (Name)', 'To', 'Start', 'Duration', 'Disposition', 'Direction', and 'Call Type'. The table shows 1-8 of 8 records.

4. Click **Download > Search Result**.
5. To confirm, click **OK**.
6. Open the downloaded file.
7. If the downloaded file shows # characters, expand the columns to display all the text.

Adding a personal contact

You can select a caller in the call history to create a new personal contact.

1. In **Call History**, select the checkbox at the beginning of the row for the caller that you want to add.
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 system administrator must enable the functionality on the FortiVoice phone system.

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:

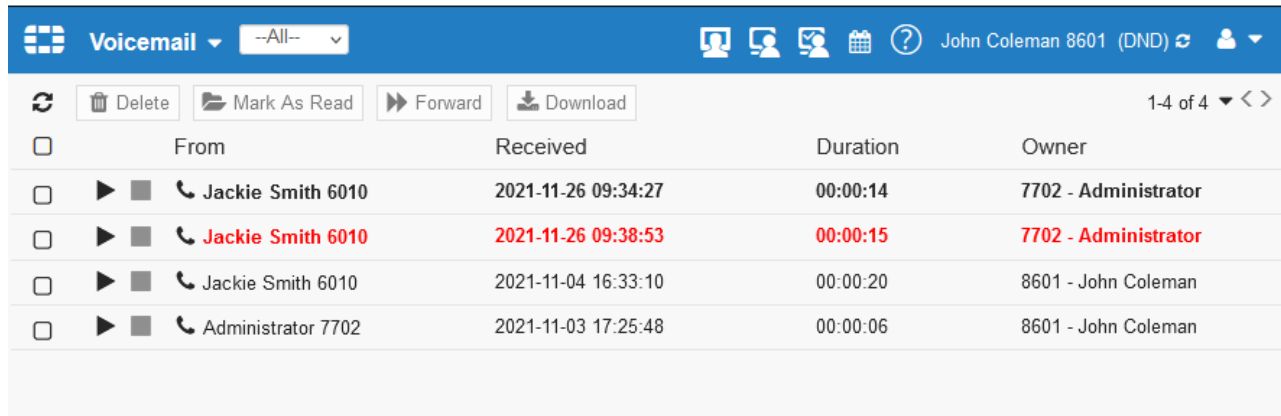
- [Displaying your voicemails on page 18](#)
- [Playing a voicemail on page 19](#)
- [Deleting a voicemail on page 19](#)
- [Forwarding a voicemail on page 19](#)
- [Downloading a voicemail on page 19](#)

For details about voicemail options, see [Preferences on page 39](#).

Displaying your voicemails

Use this procedure to display voicemails for your extension. If the FortiVoice administrator has configured your extension with this function, then the **Voicemail** menu can also show voicemails from other users or groups.


1. Go to **Voicemail**.
2. From the drop-down menu, select one of the following filter choices:
 - **All**: Shows all voicemails for your extension.
 - 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 administrator has allowed your extension to receive a notification when other users or groups receive a voicemail, then the **Owner** column is visible to show the extension to which the voicemail belongs to. Here is an example:



The screenshot shows the Voicemail interface with a blue header bar. The header bar contains the word "Voicemail" and a dropdown menu set to "--All--". To the right of the header bar are several icons: a person, a person with a checkmark, a person with a speech bubble, a calendar, a question mark, and the user name "John Coleman 8601 (DND)" with a refresh icon and a user profile icon. Below the header bar is a toolbar with icons for "Delete", "Mark As Read", "Forward", and "Download". To the right of the toolbar is the text "1-4 of 4" with navigation arrows. The main content area is a table with the following columns: "From", "Received", "Duration", and "Owner". The table contains four rows of voicemail data.

	From	Received	Duration	Owner
<input type="checkbox"/>	▶ Jackie Smith 6010	2021-11-26 09:34:27	00:00:14	7702 - Administrator
<input type="checkbox"/>	▶ Jackie Smith 6010	2021-11-26 09:38:53	00:00:15	7702 - Administrator
<input type="checkbox"/>	▶ Jackie Smith 6010	2021-11-04 16:33:10	00:00:20	8601 - John Coleman
<input type="checkbox"/>	▶ Administrator 7702	2021-11-03 17:25:48	00:00:06	8601 - John Coleman

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

You can forward a voicemail to another extension or a general voicemail.



The general voicemail forwarding function requires that the FortiVoice administrator has configured a general voicemail on the FortiVoice phone system first.

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 or general mailbox.
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**.

Contact and corporate directory

The **Contact** menu displays all of the extensions in your organization, including details such as display name on the phone, main number, and location.

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

You can sort the **Personal Contact**, 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** but the FortiVoice system administrator manages the **Business Contact** and **Directory**.

This section includes the following topics:

- [Calling a contact on page 20](#)
- [Adding a personal contact on page 20](#)
- [Editing a personal contact on page 21](#)
- [Deleting a personal contact on page 21](#)
- [Importing a list of personal contacts on page 21](#)
- [Exporting a list of personal contacts on page 22](#)
- [Updating a personal contact favorite list on page 22](#)
- [Updating a speed dial list of personal contacts on page 22](#)
- [Configuring a personal block list on page 22](#)

Calling a contact

1. Go to **Contact > Business Contact, Personal Contact, or Directory**.
2. To initiate a call, click the phone icon  next to the extension or 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 box to the left of the display name 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 box to the left of the display name and then click .
3. To confirm, click **Delete**.

Importing a list of personal contacts




When you import a list of contacts, you overwrite any existing contacts in the personal contact list.

Use this procedure to import contacts from a file with data represented in a comma-delimited format also referred to as comma-separated values (CSV) in **Personal Contact**.

1. Go to **Contact > Personal Contact**.
2. Click  and select **Import**.
The File Upload dialog opens.
3. Find the CSV file to import and click **Open**.
The personal contact list includes the newly imported contacts.



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. Choose to save the CSV file and click **OK**.


Updating a personal contact favorite list

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

1. Go to **Contact > Personal Contact**.
 - To add a contact to a favorite list, click the star icon  next to the display name.
 - To remove a contact from a favorite list, click the star icon  next to the display name.
 - 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 main number, click the down arrow  .
 - To add a phone 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**.
 - To remove a phone number from the speed dial list, select **Remove from Speed Dial**
3. 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 system administrator must enable the functionality on the FortiVoice phone system.

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 main 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:

- [Managing a call on page 24](#)
- [Configuring Quick call handling on page 26](#)
- [Configuring the Follow Me setting on page 26](#)
- [Enabling the Do Not Disturb setting on page 27](#)

Managing a call

1. Go to **Call Handling**.
2. Under **Setting**, select a call status from the drop-down 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 22](#).

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**.

Setting ▾

Configure how to handle calls when in status: Normal ▾

Call Process

System default action (Ring Phone)

User defined

+ New... Edit... ↑ Move ▾ 🗑 Delete

Schedule Call from Action Info

4. If you selected **User defined**, click **New** to define a call process according to a schedule.
 - a. Select a default **Schedule** for the call action. Once a schedule is assigned, you can click **View** to display the schedule details.
 - b. Select whether this call process applies to **Internal**, **External**, and/or **Office peer** calls.
 - c. 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.
 - d. If you select **Follow me**, select a follow me profile. For information about configuring follow me, see [Configuring the Follow Me setting on page 26](#).
This option is only available if your administrator enables call forwarding in your extension's user privilege.
 - e. If you select **Play announcement**, you have the option to select one of the default sound files or customize the sound file. For details about customizing the sound file, see [Customizing a sound file for an announcement on page 27](#).
 - f. If you select **Auto attendant**, select a default auto attendant.
 - g. 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**.

Configuring Quick call handling

Use Quick call handling to change your call handling settings for a short period of time and leave your regular call handling settings unaffected by this change. The quick call handling settings are tied to the settings under **Preferences > Quick Mode** (see [Preferences on page 39](#)).

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 drop-down 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 the Follow Me setting

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.

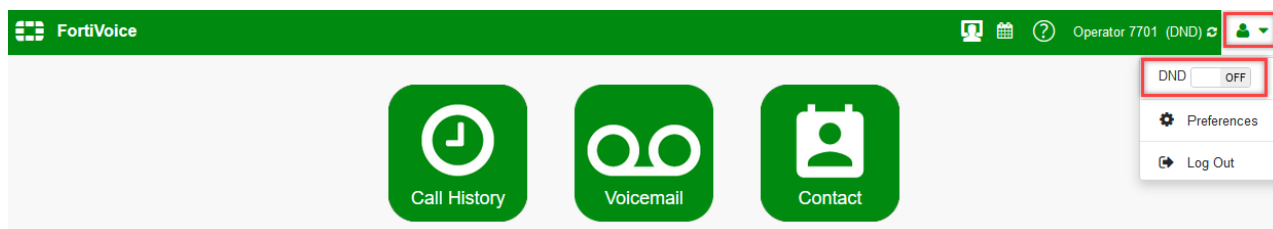
Enabling the Do Not Disturb setting

You can enable the Do Not Disturb (DND) setting for your extension.

When you enable the DND setting, the FortiVoice phone system sends your calls to your voicemail unless you have changed the setting in [Managing a call on page 24](#).

To enable the DND setting for your extension

1. Click the account icon.
2. Go to **DND**.



3. Turn on the **DND** toggle.

Customizing a sound file for an announcement

In **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 details about the call process configuration, see [Call handling on page 24](#).

To customize a sound file

1. Option 1: Go to **Call Handling > Setting**.
 - a. In **Call Process**, click **User defined**.
 - b. Click **New**.
2. Option 2: Go to **Call Handling > Quick call handling**.
 - a. In **Call Process**, 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**. A **Sound file** drop-down menu appears.
5. Click **New** (the plus + icon next to the drop-down menu).
6. Enter a **Name** for the sound file.
7. In **Action**, you have two options:
 - a. **Option 1:** Record your announcement.
 - i. Click **Call me**. A message appears stating that a voice recording request (or call) has been sent to your extension.
 - ii. Answer the call and record your announcement using the phone.
 - iii. Click **Yes** when you have finished recording your announcement.
 - iv. To save the recorded announcement, click **Download**.
 - b. **Option 2:** Import 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 WAV file.
 - iv. Click **Open**.
8. Click **Close** and click **OK** to finish the call process configuration.

Call recording

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

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



FortiVoice supports two types of recordings:

- **Personal recording:** You can access your phone call recordings from the FortiVoice user portal.
- **System recording:** With the administrator privilege, you can access phone call recordings from the FortiVoice web-based manager. For more details about this recording type, see the Call recording section in the [FortiVoice Cookbook](#).

Before you begin

- **To record a phone call:** Make sure that the FortiVoice system administrator applies a user privilege (Phone System > Profile), with the Monitor/Recording > Personal recording option enabled, to your extension.
- **To access a phone call recording:** Make sure that the FortiVoice system administrator applies a user privilege (Phone System > Profile), with the User Portal > Call recording option enabled, to your extension.


To record a phone call



Before recording a phone call, make sure that the person you are talking to agrees to have the conversation recorded or check your local laws regarding phone recording.

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

To manage recorded phone calls

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 faxes received on that fax extension.

This section includes the following topics:

- [Viewing a fax received on your extension on page 30](#)
- [Sending a fax on page 30](#)
- [Viewing a fax sent from your extension on page 31](#)
- [Monitoring a fax extension on page 31](#)

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** and click **New**.
2. Configure the following fields:

GUI field	Description
To	Enter the fax number to which you want to send the fax.
Attachment (PDF and JPEG only)	Click the plus (+) icon to locate the fax 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.

3. 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.

Monitoring a fax extension



To monitor incoming faxes on a fax extension, the FortiVoice 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 for 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 to the left, and click **Delete**.
 - To resend the fax, select the checkbox to the left, and click **Resend**.
 - To forward the fax, select the checkbox to the left, and click **Forward**

Conference

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



To have access to **Conference**, the FortiVoice system administrator must give you the privilege to organize conference calls.

FortiVoice allows two types of conferencing:

- **User conferencing:** You can set up conferences using the FortiVoice user portal.
- **Admin conferencing:** The administrator can set up conferences using the FortiVoice web-based manager. For details, see the [FortiVoice Phone System Administration Guide](#).

This section includes the following topics:

- [Specifications for conference call events on page 32](#)
- [Adding a conference call event on page 33](#)
- [Adding a conference announcement on page 35](#)

Specifications for conference call events

User conference call events include the following specifications:

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

The following table lists specifications for user conference call events.

Model	Conference call event	
	Attendee limit	Concurrent event limit
FVE-VM-100 / FVE-100E	8	3
FVE-VM-200 / FVE-200F	8	3
FVE-300E	8	3
FVE-VM-500 / FVE-500E / FVE-500F	20	3
FVE-VM-1000 / FVE-1000E	20	5
FVE-VM-2000 / FVE-2000E / FVE-2000F	20	5
FVE-VM-3000 / FVE-3000E	20	8

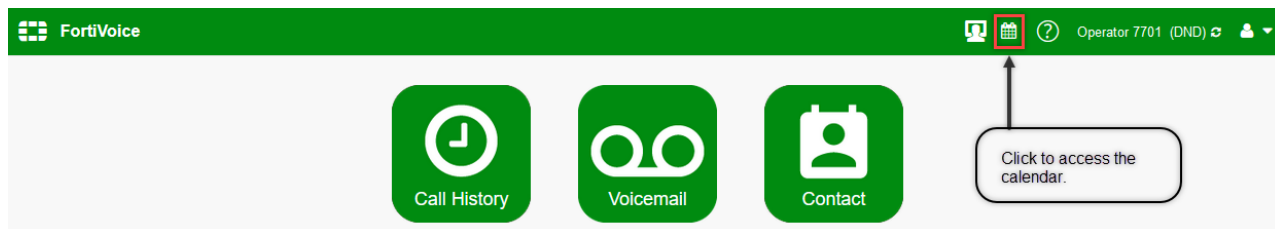
Model	Conference call event	
	Attendee limit	Concurrent event limit
FVE-VM-5000 / FVE-5000F	20	10
FVE-VM-10000	20	20
FVE-VM-20000	20	20
FVE-VM-50000	20	20

Adding a conference call event

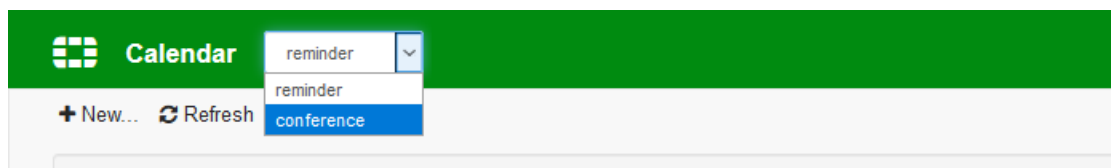


To have access to **Conference**, the FortiVoice system administrator must give you the privilege to organize conference calls.

1. Access the calendar.





2. Select **conference**.



3. In the monthly calendar, double-click a date.
4. Complete the following fields:

GUI field	Description
Title	Add a title for the conference call event.
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:

GUI field	Description
	<ul style="list-style-type: none"> • Use voicemail PIN: This code is also used to access your voicemail messages and is stored on the FortiVoice phone system under Extension > Extension > User Setting, Phone Access. • Use personal code: This code is also used to access restricted calls and is stored on the FortiVoice phone system under Extension > Extension > User Setting, Phone Access. • Specific: You can 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	<div style="border: 1px solid black; padding: 5px;">  Both start and end times use the time zone setting available in Preferences > Display Preference. </div> <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.</p>
End time	<p>Select the time for the conference call event to end. If the event will last all day, do not select an end time.</p>
All day event	If the duration of the conference call will be an entire day, select the check box.
Recurrence	If you want the conference call event to be on a repeating schedule, click None , update the recurrence settings, and click OK .
Attendee	<div style="border: 1px solid black; padding: 5px;">  For details about the attendee limit for user conferencing, see Specifications for conference call events on page 32. </div> <hr/> <ol style="list-style-type: none"> 1. Click Add Attendee. 2. For every attendee, add an email and a display name, and click Create. 3. Repeat for every attendee.

5. To save the conference call event, go near the top left of the window and click **OK**.

Example email received by an invited attendee

Juliet [redacted] has invited you to a Conference Call - Marketing meeting

Subject: Marketing meeting
 Organizer: Juliet [redacted] - [redacted] @gmail.com'
 When: Thu Jun 04 2020 06:30
 Location: Ottawa
 Conference ID: 903903
 Conference PIN: 193311
 Access: Please dial ext 7501 to attend this conference.
 Attendees: Nathalie - [redacted] @fortinet.com'
 Description: New phone models

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

6. To exit the calendar and return to the main page:

Adding a conference announcement

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.

To add a conference announcement

1. Click the account icon.
2. Click **Preferences**.

3. In **Conference Options**, you have two options:
 - Option 1: To initiate the creation of an announcement:
 - i. Click **Call me**.
 - ii. Answer your extension.
 - iii. Follow the prompts to record the announcement.

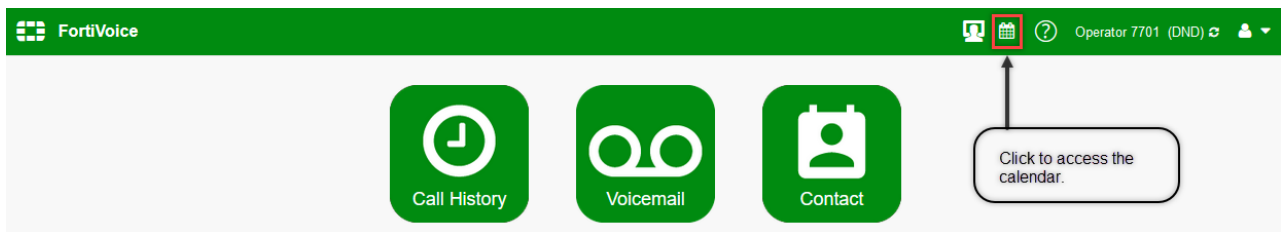
- Option 2: To use an announcement that you have already recorded:
 - i. Verify that the file meets the following requirements:
 - Format: WAV
 - Channel: Mono
 - Bit rate: 8000 Hz (8 kHz)
 - Sampling: 16-bit PCM
 - ii. Click **Upload**.
 - iii. Follow the prompts to upload the file.
- 4. To save the changes, click **OK**.

Reminder


You can add a reminder event in your calendar and set the extensions to which you want to send the event reminder calls.

Adding a calendar reminder

1. Access the calendar.

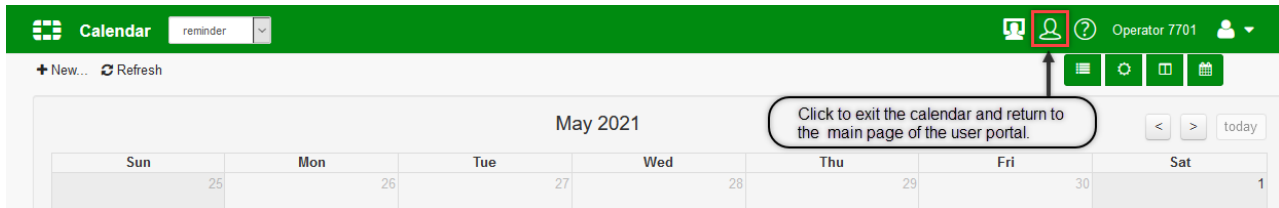


2. In the monthly calendar, double-click a date.
3. Complete the following fields:

GUI field	Description
Title	Add a name for the reminder event.
Description	Optionally, add a description for the reminder event.
Location	Optionally, add a location for the reminder event.
Start time	 The start time uses the time zone setting available in Preferences > Display Preference . Specify when the reminder event starts.
Recurrence	If you want the reminder event to be on a repeating schedule, click None , update the settings, and click OK .
Guest	Select the internal and external phone numbers to which you want to send the event reminder call.
Reminder audio	To send a reminder audio to the selected guest phones, select one of the following options: <ul style="list-style-type: none">• Default: Select to send a beep sound as the reminder audio. To hear the beep sound, click Play.• Customized: Select to customize the reminder audio.<ol style="list-style-type: none">a. Click Create New.b. You have two options to create a customized message:

GUI field	Description
	<ul style="list-style-type: none"> Option 1: To record your message, select an extension and click Call me. You can then follow the prompts to create a new message. Option 2: To upload a message that you have already recorded, verify that the file meets the requirements (8 bit, 8 kHz, mono, and WAV file format). Click Upload. <p>c. Click Close.</p>

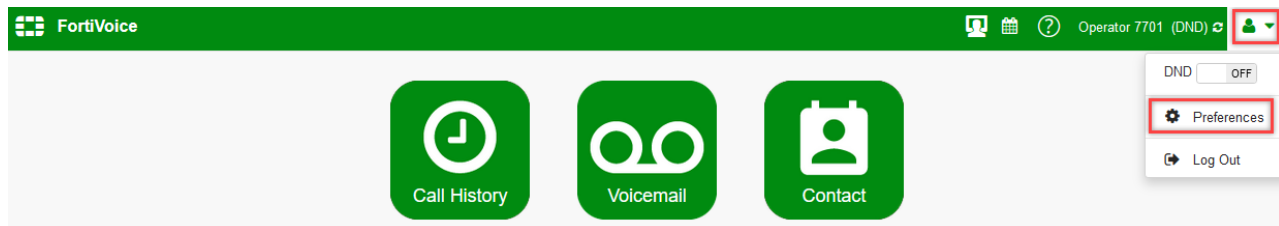
- To save the reminder event, go near the top left of the window and click **OK**.
- To exit the calendar and return to the main page:



Preferences

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


1. Click the account icon.
2. Click **Preferences**.



3. You can customize the settings for the following preferences:


- [User Setting](#) on page 39
- [Display Preference](#) on page 40
- [Incoming Calls](#) on page 40
- [Quick Mode](#) on page 40
- [Notification Options](#) on page 41
- [Voicemail Options](#) on page 41
- [Conferencing Options](#) on page 42
- [Twinning Setting](#) on page 42

GUI field	Description
User Setting	
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).
Emergency caller ID	Displays the caller ID to display on the destination phone when the emergency number is dialed (read-only).
External caller ID	Displays a particular caller ID on a called phone instead of the FortiVoice main number or the trunk phone number (read-only). The format must be <code>name<phone number></code> , such as <code>jdoe<2221111234></code> . If you are not sure about this feature, contact your administrator for more information.
Call forward	Enable to forward phone calls and enter the phone number to forward the calls.
Idle timeout	Enter the duration of time in minutes before you are logged out of the user portal. Set the value between 1 and 1440 (maximum of one day in minutes).

GUI field	Description
Change PIN number	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	<div data-bbox="657 367 738 472" style="text-align: center;">  </div> <p>The Change User Password is available when the FortiVoice Cloud system administrator has set your extension to use the local authentication type for web access.</p> <hr/> <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>
Click and scan to login softclient	Click to view and scan your softclient QR code. To scan the QR code, open the FortiFone softclient application on your smartphone and go to Account > Scan QR Code . For more details, see the FortiFone Softclient User Guide .
Display Preference	
Default portal	Set the default portal to open when you log in: User portal (by default), Operator console , or Call center console . For more information about the different consoles, see Call center console on page 56 and Operator console on page 50 .
Phone language	Set the phone language for the extension.
Web language	Set the user portal language (English by default).
Theme	Set the display color theme for the user portal (Green by default).
Time zone	Set the time zone for the user portal (GMT -8:00 Pacific Time US & Canada by default).
Incoming Calls	
Retain original caller ID	Enable to display the original caller's number of an incoming call.
Call screening	Enable to request callers to state who they are and why there are calling when receiving an incoming call, allowing you to safely answer expected calls or cancel unwanted and spam calls.
Record caller name	Enable to record the names of incoming callers.
Ring duration	Specify the duration of time in seconds that incoming calls will ring for before going to voicemail.
Call waiting	Enable to allow you to answer an incoming call while on another call.
Quick Mode	Quick mode allows you to enable a secondary set of call handling rules that do not affect your regular user call handling settings (from Managing a call on page 24). To define the behavior of the quick mode settings (Out of office, Away, and Other), see Configuring Quick call handling on page 26 .

GUI field	Description
Effective mode	Shows the mode that is active. For example: Out of office: (expiring at 2021-10-28 09:00:00) If Effective mode is blank, then none of the quick modes are 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.
Notification Options	
Voicemail	Select the email notification option to use when this extension receives a voicemail: <ul style="list-style-type: none"> • None: Do not send a notification. • Simple: Send an email notification. • With attachment: Send an email notification with the voicemail attached.
Fax	Select the type of email notification option to use when this extension receives a fax: <ul style="list-style-type: none"> • None: Do not send a notification. • Simple: Send an email notification. • With attachment: Send an email notification with the fax 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 for voicemails, faxes, and missed calls to be sent.
Voicemail Options	
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.

GUI field	Description
	<div data-bbox="657 321 738 426" data-label="Image"> </div> <p data-bbox="781 275 1419 336">If you want to import a pre-existing sound file, make sure that the file meets the following requirements:</p> <ul data-bbox="792 344 1097 478" style="list-style-type: none"> • Format: WAV • Channel: Mono • Bit rate: 8000 Hz (8 kHz) • Sampling: 16-bit PCM <p data-bbox="613 520 1419 613">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 file requirements.</p>
<p data-bbox="483 638 589 665">Greeting</p>	<p data-bbox="613 638 1442 732">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:</p> <ul data-bbox="625 741 1412 940" style="list-style-type: none"> • 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. • Conditional: The greeting that applies when you are either busy or unavailable.
<p data-bbox="248 968 522 995">Conferencing Options</p>	<div data-bbox="657 1035 738 1140" data-label="Image"> </div> <p data-bbox="781 1043 1401 1136">To access conferencing options, your FortiVoice system administrator must add your extension to the user conferencing call feature.</p> <p data-bbox="613 1184 1273 1211">To add a conference announcement, you have two options:</p> <ul data-bbox="625 1220 1396 1312" style="list-style-type: none"> • Option 1: Initiate the creation of an announcement by clicking Call me, answer your extension, and follow the prompts to record the announcement. <div data-bbox="657 1402 738 1507" data-label="Image"> </div> <p data-bbox="781 1354 1419 1415">If you want to import a pre-existing announcement file, make sure that the file meets the following requirements:</p> <ul data-bbox="792 1423 1097 1558" style="list-style-type: none"> • Format: WAV • Channel: Mono • Bit rate: 8000 Hz (8 kHz) • Sampling: 16-bit PCM <ul data-bbox="625 1600 1373 1661" style="list-style-type: none"> • Option 2: To upload an announcement that you have already recorded, click Upload and follow the prompts to upload the file.
<p data-bbox="248 1684 461 1711">Twinning Setting</p>	

GUI field	Description
<p>Setting</p>	<div style="border: 1px solid #ccc; padding: 10px;">  <p>To access the twinning setting, your FortiVoice system administrator must enable twinning in the user privilege for your extension.</p> <hr/> <p>Twinning allows an external telephone (cell phone or home phone) to replicate your internal office extension.</p> <ul style="list-style-type: none"> • Disabled: Select to disable twinning. • Simple: Select to configure basic twinning by adding a phone number. • Scheduled: Select to configure twinning by adding phone numbers based on a schedule or multiple schedules (three maximum). </div>

4. When you have finished customizing your preferences, click **OK**.

Programmable keys



The FortiVoice user portal only shows the Programmable Keys menu, if you are using a FortiFone desk phone that supports programmable keys.

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

Your FortiVoice system administrator can define keys as admin-assigned (Phone System > Profile > Programmable Keys). You cannot customize these keys. However, your FortiVoice system 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 system administrator may choose to reserve up to the first four lines.

To set programmable keys

1. Click the account icon.
2. Click **Programmable Keys**.


Option:	Function	Resource	Label
1.	Reserved	Reserved	Reserved
2.	Reserved	Reserved	Reserved
3.	Extension appearance	126 (126)	126 (126) 126
4.	Line appearance	LINE_126_341 (1)	LINE_126_341
5.	--User Assigned--		
6.	--User Assigned--		
7.	--User Assigned--		
8.	--User Assigned--		
9.	--User Assigned--		
10.	--User Assigned--		
11.	--User Assigned--		
12.	--User Assigned--		




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




For this example extension, the user has one **Page**, or twelve keys. Lines 1 and 2 designated as **Reserved**, followed by two more lines that have been admin-assigned to specific functions. 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**.

3. 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 45](#).
 - 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.
4. Click **OK**.

Programmable key descriptions

Function	Description	Resource	Label
Call forward	Allows you to enable or disable and configure the call forward function.	Stays blank.	Edit the label or keep the default label (Call forward).
DTMF	 The DTMF function is only available during a call.		
	DTMF (dual-tone multi-frequency) 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. This key is useful when you need to enter consistent codes at an interactive voice response (IVR) system.	Enter the DTMF digits to dial when you press this programmable key on your phone.	Edit the label or keep the default label (DTMF).
Extension appearance	Allows you to perform the following actions: <ul style="list-style-type: none"> • 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 system administrator configures this setting as one of the following transfer types: <ul style="list-style-type: none"> • Blind: Allows you to transfer a call without talking to the person 	Select an extension from the list.	Edit the label or keep the one associated with the selected extension.

Function	Description	Resource	Label
	<p>receiving the transfer.</p> <ul style="list-style-type: none"> Attended: Allows you to announce the call to the person receiving the transfer and then complete the transfer. 		
Intercom	 <p>The Intercom function works for internal extensions (not for external extensions).</p>		
	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).
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	 <p>The FortiVoice system administration configures the call parking settings (park call number, park line start, and park line end).</p>		
	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).
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).
Record	 <p>The Record function is only available if the FortiVoice system administrator has applied a profile with personal recording enabled to your extension.</p>		
	Allows you to record a phone call.	Stays blank.	Stays blank to use the Record label.
Reserved for line	By default, the FortiVoice phone system reserves the first two programmable keys for lines on the phone so you can monitor your own calls on those lines.	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
	If your phone has additional lines, then you can use the Reserved for line function to program the appearance of those lines.		
System speed dial	 <p>Before using the system speed dial key, the FortiVoice system administrator must configure the speed dial numbers on the system.</p>		
	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 system administrator.
Twinning	 <p>Before using the twinning function, make sure that:</p> <ul style="list-style-type: none"> The FortiVoice system administrator has applied a profile (with twinning enabled) to your extension. Configure the twinning function. See twinning settings in Preferences on page 39. 		
	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).
User speed dial	 <p>The User speed dial function shows personal contact choices that you have configured on the FortiVoice user portal. For details, see Updating a speed dial list of personal contacts on page 22.</p>		
	Allows you to quickly place a call to the selected extension or phone number at a touch of a button.	Select a contact from your speed dial list.	Edit the label or keep the one associated with the selected contact.

Softclient

With the FortiFone softclient (Android, iOS, or desktop), you stay connected to the office, never missing an important call. You transform your device into an extension connected to the FortiVoice phone system.



To display softclient details in the FortiVoice user portal, the FortiVoice system administrator must upload the required softclient license and set the softclient license allocation for your extension.

This section includes the following topics:

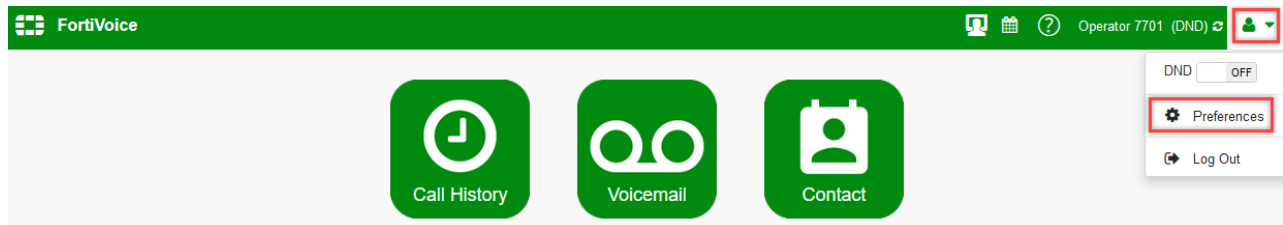
- [Displaying the softclient QR code for scanning on page 48](#)
- [Displaying FortiFone softclient details on page 49](#)
- [Revoking a FortiFone softclient license on page 49](#)

Displaying the softclient QR code for scanning

The FortiFone softclient (Android or iOS) installation requires that you display the softclient QR (quick response) code on your PC screen for scanning.

For more details about installing, configuring, and using the FortiFone softclient, see the [FortiFone Softclient User Guide \(Android or iOS\)](#).

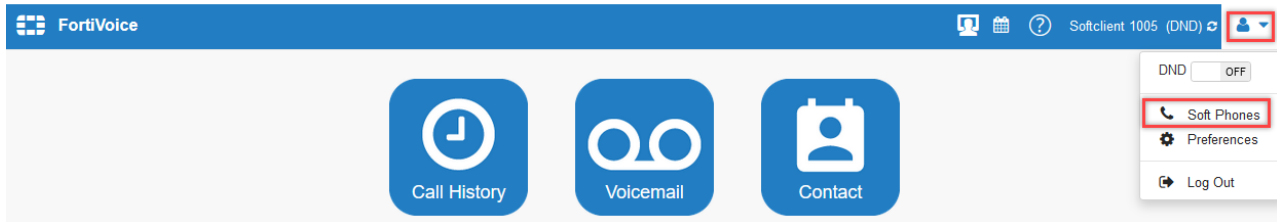
1. Click the account icon.
2. Click **Preferences**.



3. In **User Setting**, click the link **Click and scan to login softclient**.
The QR code displays on the screen.
4. When the FortiFone softclient on your mobile device is ready to scan the QR code, point your mobile camera at the PC screen displaying the QR code. For details, see the Adding a FortiVoice account using the QR code section in the [FortiFone Softclient User Guide \(Android or iOS\)](#).

Displaying FortiFone softclient details

1. Click the account icon.
2. Click **Soft Phones**.



The FortiVoice user portal displays softclient details. Here is an example:

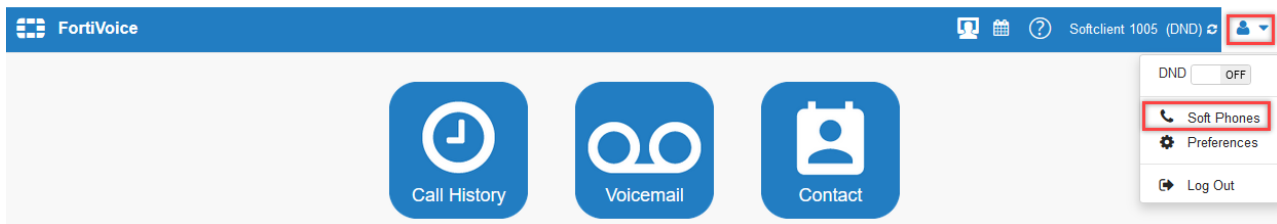
 A screenshot of the FortiVoice user portal showing the 'Soft Phones' section. The table below has the following data:

Extension Number	Client Version	Phone Info	OS Platform	OS Version	Revoke
1005	3.0.7.123	ot-canderson-nb	Windows	10.0.19042	

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. Click the account icon.
2. Click **Soft Phones**.



3. For the softclient license that you want to remove, go to the **Revoke** column and click

 A screenshot of the FortiVoice user portal showing the 'Soft Phones' section. The table is the same as in the previous image, but the 'Revoke' column for the row with extension number 1005 is highlighted with a red box.

Extension Number	Client Version	Phone Info	OS Platform	OS Version	Revoke
1005	3.0.7.123	ot-canderson-nb	Windows	10.0.19042	

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

Operator console



To have access to the **Operator console**, the FortiVoice system administrator must assign the operator role (Phone System > Profile > User Privilege > Operator Role) to your extension.

In the **Operator console**, you can perform the following tasks:

- Process phone calls on the web as your organization's phone operator.
- Manage hotel room status.

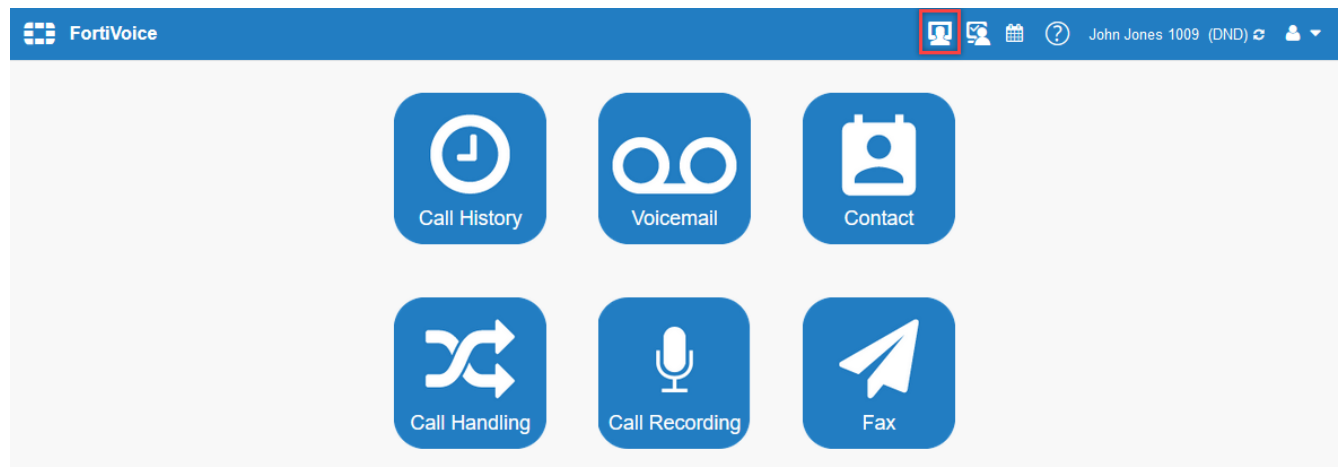
This section includes the following topics:

- [Logging in and logging out of the Operator console on page 50](#)
- [Managing active calls on page 51](#)
- [Making a call on page 51](#)
- [Managing parked calls on page 52](#)
- [Checking the directory on page 52](#)
- [Managing hotel room status on page 52](#)

Logging in and logging out of the Operator console

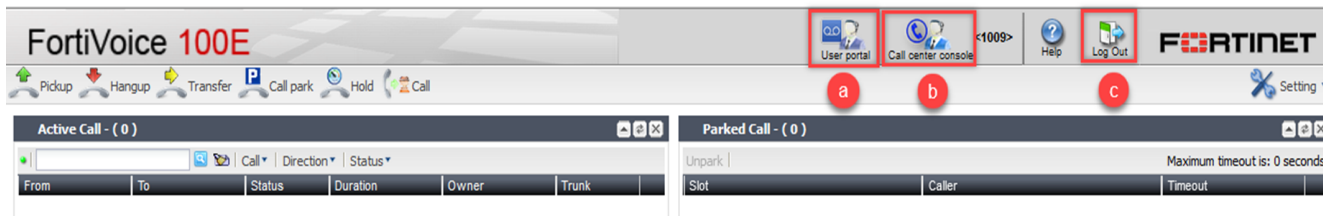
To log in to the Operator console

1. Go to the top of the user portal window and click **Operator console** .



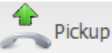

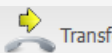


To log out of the Operator console

1. Click one of the following options:
 - a. Go to the **User portal**.
 - b. Go to the **Call center console**, if your extension includes this privilege.
 - c. Log out of the **Operator console**.



Managing active calls

When an active call appears in the **Active Call** widget, you can select the call and click the one of the following icons:

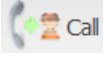
Icon	Description
 Pickup	Pick up the call.
 Hangup	Hang up the call.
 Transfer	Transfer the call by dragging and dropping it to an extension (or the voicemail of an extension) in Idle , In Use , Busy , Ringing , or On Hold status in the Directory widget.
 Call park	Park the call.
 Hold	Hold the call.

In the **Active Call** widget, you can filter the calls by category, direction, and status. The **Call** filter has the following options:

- **All**: Displays all phone calls.
- **Short**: Displays ringing calls and calls to and from the operator extension.
- **Mine**: Displays calls to and from the operator extension.

Making a call


If you need to make a call as your organization’s phone operator using the Operator console, then you can do one of the following actions:

- Right-click an extension from the **Directory** widget and click **Call**.
- Click **Call**  and either enter or select an extension to call.

The **Active Call** widget shows the extension that you are calling.

Managing parked calls

Here is how the **Parked Call** widget works:

1. An extension parks a call on the system.
2. The call appears in the **Parked Call** widget of the Operator console.
3. In the list of the **Parked Call** widget, one of the users of the Operator console can then select the call, and click **Unpark**. The phone of that Operator console user rings with the parked call.
4. To refresh the list of parked call, click Refresh .

Checking the directory

The **Directory** widget lists the extensions for your organization. You can filter the extensions by user, group, conference, location, and type.

Managing hotel room status



Prior to accessing the Room Status widget, make sure that the FortiVoice system administrator performs the following tasks on the FortiVoice phone system:

- Load the hotel management license.
- Configure the hotel management settings. For details, see the Working with Property Management System section in the [FortiVoice Phone System Administration Guide](#).
- Set the user privilege of your extension with the Operator Role - Hotel room active (Phone System > Profile > User Privilege).

The Room Status widget shows the hotel room status which is related to the information available or updated on the FortiVoice phone system under Hotel Management > Room Status.

This section includes the following topics:

- [Showing the Room Status widget on page 53](#)
- [Checking the PMS connection status on page 53](#)
- [Checking the room setting status on page 53](#)
- [Editing room settings for a single room on page 54](#)
- [Editing room settings for multiple rooms on page 55](#)
- [Setting up or editing a wake up call on page 55](#)

Showing the Room Status widget

If the Room Status widget is not visible, then perform this procedure to show this widget:

1. Click **Setting**.



2. Go to **Add Content > Room Status**.
The Operator console shows the Room Status widget.

Checking the PMS connection status

The Room status widget can give you an indication of the connection status of FortiVoice with the PMS.

Check the connection of FortiVoice with the PMS:
Dot color and connection status:
Green: Connected
Red: Not connected

Room Status									
Edit... Check-in Check-out Privilege Room condition Room setting VIP setting									
Page 1 / 1 Records per page: 50 Guest rooms --All-- Search: Total: 4									
	Guest	VIP	Room	Number	Checkin	Condition	DND	Wake Up	
<input type="checkbox"/>	●	●	7701-west wing	7701	●	2 (Clean)	●	🕒	
<input type="checkbox"/>	●	●	7711	7711	●	6 (Occupied/Clean)	●	🕒	
<input checked="" type="checkbox"/>	●	●	7712	7712	●	8 (Vacant/Clean)	●	🕒	
<input type="checkbox"/>	●	●	7713	7713	●	2 (Clean)	●	🕒	

Checking the room setting status

The Room Status widget uses dots with the following colors:

- Red: Shows that the room setting is disabled.
- Green: Shows that the room setting is enabled.

	Guest	VIP	Room	Number	Checkin	Condition	DND	Wake Up
<input checked="" type="checkbox"/>	●	●	7701-west wing	7701	●	2 (Clean)	●	
<input type="checkbox"/>	●	●	7711	7711	●	6 (Occupied/Clean)	●	
<input type="checkbox"/>	●	●	7712	7712	●	8 (Vacant/Clean)	●	
<input type="checkbox"/>	●	●	7713	7713	●	2 (Clean)	●	

Editing room settings for a single room

1. Select the row of the room that you want to edit.
2. In the first column, select the check box.
3. Click **Edit**.
4. Edit one or more of the following settings, as required:

GUI field	Description
Number	The extension number of the room. This field is read-only.
Room	Click to edit the hotel room number.
Location	Click to enter a room location.
Checkin status	Enable the status as Checked-out or Checked-in.
Guest name	Enter the name of the guest for this room. This option is available only if Checked-in is enabled.
Privilege	Select the phone call restriction (internal, local, or long distance) or option (1, 2, 3) for the room. The FortiVoice administrator sets privileges on the FortiVoice phone system (Phone System > Profile > User Privilege). This option is available only if Checked-in is enabled.
DND	Select if the guest of the room does not want to be disturbed. This option is available only if Checked-in is enabled.
VIP setting	Select to set the guest as a VIP. Specific VIP treatments are determined by each hotel.
Room condition	Select the cleaning status of the room. You can add a new code or edit the current one: <ol style="list-style-type: none"> 1. To add a new code, click New. To edit an existing code, select the code and click Edit. 2. Select the protocol for connecting to your PMS. 3. Enter a code number.

GUI field	Description
	4. Enter the code description.
	5. Click Create .

5. Click **OK**.

Editing room settings for multiple rooms

1. Select more than one room in the list.
2. When you select multiple rooms that have one or more identical settings, then you can edit those settings.

Available settings can include:

- Check-in
- Check-out
- Privilege
- Room condition
- Room setting
- VIP setting

Example of available settings for rooms 7712 and 7713:

Room Status									
Edit...									
Check-in Check-out Privilege Room condition Room setting VIP setting									
Page 1 / 1 Records per page: 50 Guest rooms --All-- Search: Total: 4									
	Guest	VIP	Room	Number	Checkin	Condition	DND	Wake Up	
<input type="checkbox"/>	●	●	7701	7701	●	2 (Clean)	●	🕒	
<input type="checkbox"/>	●	●	7711	7711	●	6 (Occupied/Clean)	●	🕒	
<input checked="" type="checkbox"/>	●	●	7712	7712	●	8 (Vacant/Clean)	●	🕒	
<input checked="" type="checkbox"/>	●	●	7713	7713	●	2 (Clean)	●	🕒	

3. Select the setting that you want to edit.
4. Depending on the setting, confirm the change by clicking **Yes** or **Apply to All**.

Setting up or editing a wake up call

1. Go to the row for the room that wants a wake up call.
2. In the **Wake Up** column, click wake up 🕒.
3. To create a new wake up call, click **New**.
To edit a wake up call, locate and expand the date in the Agenda list, and click on the wake up entry.
4. Edit the fields, as required.
5. Click **Create** or **OK**, as applicable.

Call center console

The call center console offers your organization an efficient way to receive, answer, and organize a large volume of phone calls.



To have access to the call center console, the FortiVoice system administrator must:

- Load the Call center license on the FortiVoice phone system.
- Complete the call center setup. For details, see the [Setting up a call center section in the FortiVoice Phone System Administration Guide](#).
- Enable and set up the call center option for your extension (Extension > Extension > IP Extension > Call Center).

Depending on your agent or manager profile, you can perform the following functions:

- Pick up a waiting call.
- Transfer a waiting call to an extension.
- Adjust caller priorities in a queue.
- Pause and resume your agent status with reason codes.
- Manage agents (coach, listen, log in, log out, and pause and resume agent statuses with reason codes).
- Initiate a callback.
- Monitor agent and queues status in real time.
- Receive alerts by email, phone call, or pop-up window of prolonged waiting callers, too many callers (queue overflow) for the number of available agents.
- View call and agent details.
- View agent and queue statistics.



To set up and generate call center reports, you need to access the FortiVoice phone system. For more details, see the [Configuring call center report profiles and generating reports section in the FortiVoice Phone System Administration Guide](#).

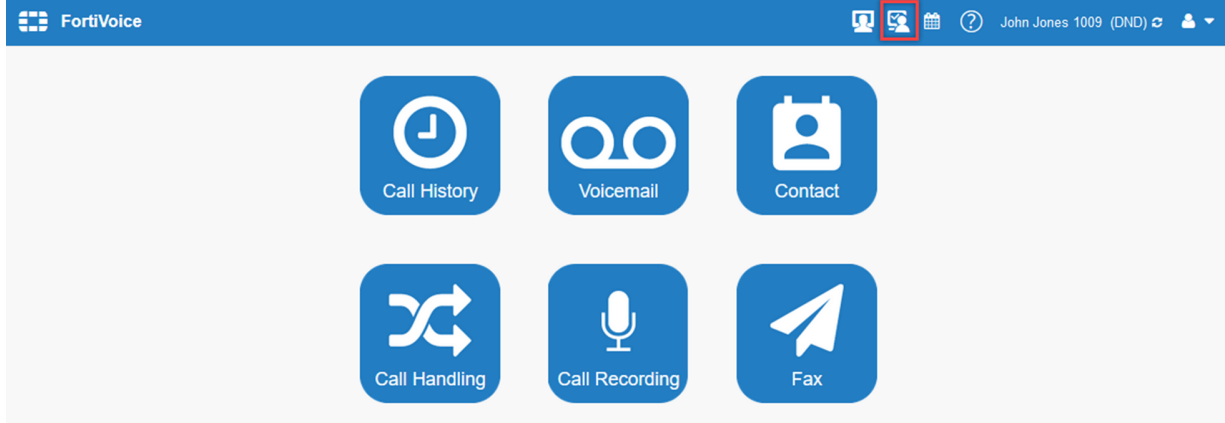
This section includes the following topics:

- [Logging in to the call center console on page 57](#)
- [Logging in to queues on page 57](#)
- [Checking the queue status on page 59](#)
- [Taking a pause from queues on page 60](#)
- [Resuming taking calls from queues on page 60](#)
- [Managing widgets on page 61](#)
- [Widgets on page 61](#)
- [Service-level alerts on page 72](#)
- [Monitor view on page 73](#)
- [Logging out of queues on page 74](#)
- [Logging out of the call center console on page 75](#)

Logging in to the call center console

1. To log in to the call center console, use one of the following two methods:

- **Using the FortiVoice user portal:** When logged in to the portal, click **Call center console** .



- **Using the direct access to the call center console:**
 - Ask your FortiVoice system administrator for the IP address or FQDN (and access port, if required) of the FortiVoice phone system that is managing your extension.
 - Know your phone extension on the FortiVoice phone system and user password for web access.
 - In a web browser, go to the following URL:
`https://<IP_address_or_FQDN>/agent`
 Where <IP_address_or_FQDN> is the IP address or FQDN of the FortiVoice phone system. If the FortiVoice system administrator has changed the access port, then you must also include the port, for example:
`https://<IP_address_or_FQDN>:446/agent`
 - Enter your extension and password.
 - Click **Login**.

2. You are now ready to go to [Logging in to queues on page 57](#).

Logging in to queues

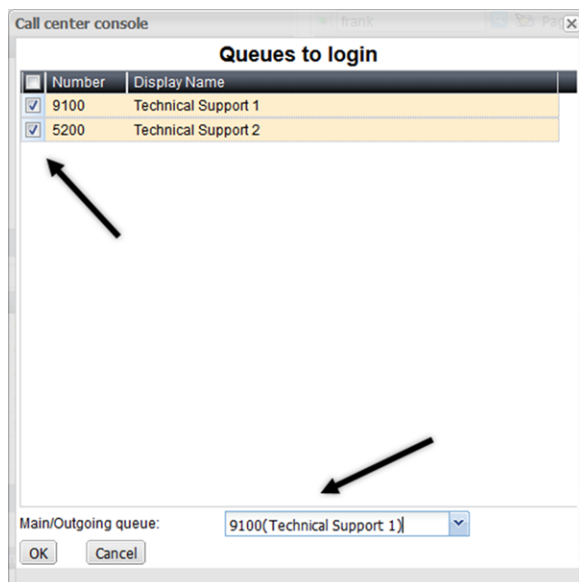
After logging in to the call center console, you need to log in to queues.

To log in to queues

1. Click  Queue Login.



2. Select one or more queues from the list.
3. In **Main/Outgoing queue**, select a queue to specify the following behaviors:
 - **Main:** When you are a member of multiple queues, this selection addresses how calls are distributed to you. The queue you select is the one that rings your extension, if there is a possibility of multiple calls offered by multiple queues.
 - **Outgoing:** This queue is your default call queue used to track outbound calls such as taking a call from callback or returning a call. When the manager generates a queue report, the report includes outbound calls associated with the Main/Outgoing queue that you selected.
4. Click **OK**.



5. When you are logged in to the queues, you can see the following UI changes:
 - The **Pause/Resume** icon is available instead of grayed out.
 - Depending on the queue status, the **Agent** icon can be green or yellow. For more details about the queue

status, see [Checking the queue status on page 59](#).






Checking the queue status

The color of the **Agent** icon gives you an indication of the queue status.

To understand the queue status

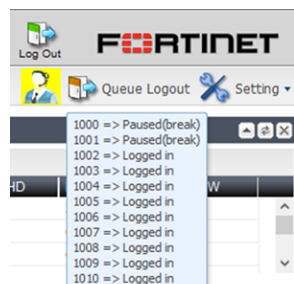
The following table lists the **Agent** icon colors and their descriptions:

Agent icon	Description
	Indicates that you are logged in to all the queues that you are a member of. You are ready to take calls.
	<ul style="list-style-type: none"> Indicates one of the following conditions: <ul style="list-style-type: none"> The status of one or more of your queues is set to <i>Pause</i>. If you are a member of multiple queues, you are logged in to at least one queue out of all the queues but not all of them. Indicates that the extension is <i>in use</i>.
	Indicates that you are logged out of queues.

To display the queue list and status

1. Hover over the **Agent** icon.

The UI displays a queue list with status.



Taking a pause from queues

Take a pause from answering calls in queues without logging out of queues by assigning a pause reason code. Let's say that you initially assign *Lunch break* as the reason code but you will be attending a meeting immediately after lunch. The call center console allows you to reset the reason code to *Meeting* and extend your pause from answering calls in queues.

To assign a reason code

1. Click **Pause/Resume**.

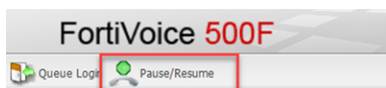


2. Click **Pause**.
3. Select queues.
4. Select a **Reason code**.
5. Click **OK**.

To reset a reason code

You can stay on pause from taking calls but you change the assigned reason code.

1. Click **Pause/Resume**.



2. Click **Reset Reason Code**.
3. Select a new **Reason code**.
4. Click **OK**.

Resuming taking calls from queues

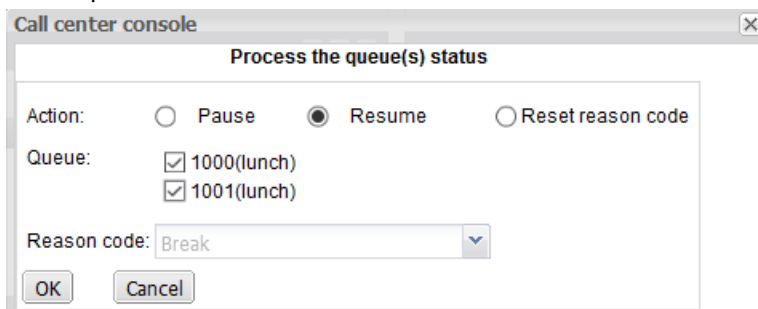
End your pause from queues and start answering calls again.

1. Click **Pause/Resume**.



2. Click **Resume**.

3. Select queues and click **OK**.

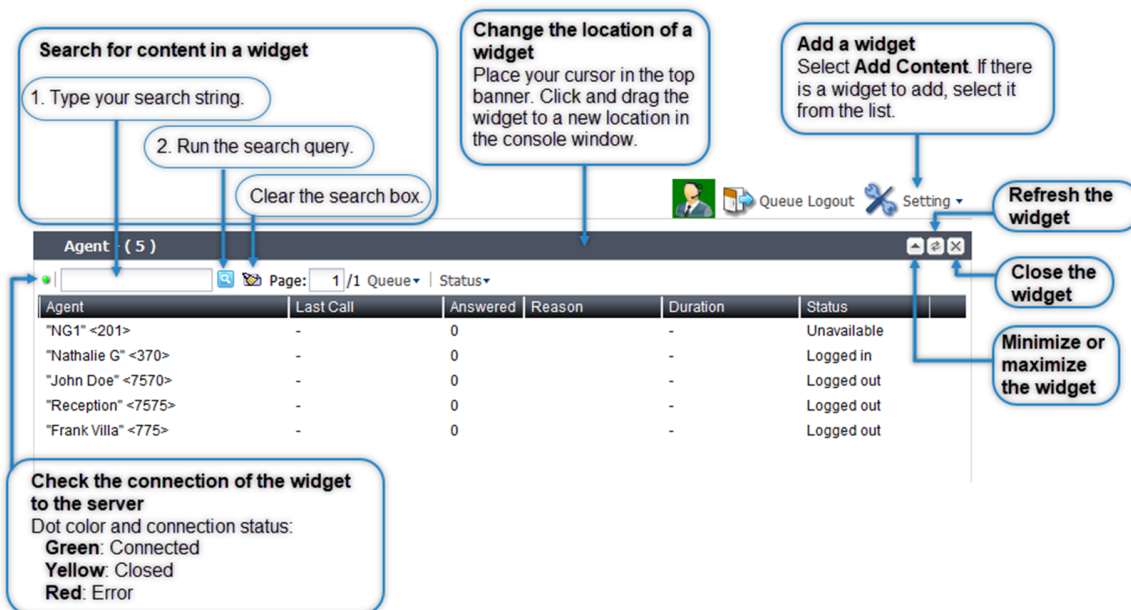


You are ready to take calls from queues.

Managing widgets

You can manage widgets to perform the following tasks:

- Minimize, maximize, refresh, close, and add widgets.
- Arrange the position of widgets in the call center console window.
- Search for content in a widget.
- Check the connection of a widget to the server.



Widgets

Depending on your agent or manager profile, the call center console can display the following widgets:

- [Waiting Caller on page 62](#)
- [Active Call on page 63](#)
- [Recent Calls on page 65](#)
- [Directory on page 66](#)
- [Agent on page 67](#)
- [Queue Stat Today on page 70](#)
- [Queue Agent Summary on page 71](#)
- [Queue Callback List on page 72](#)

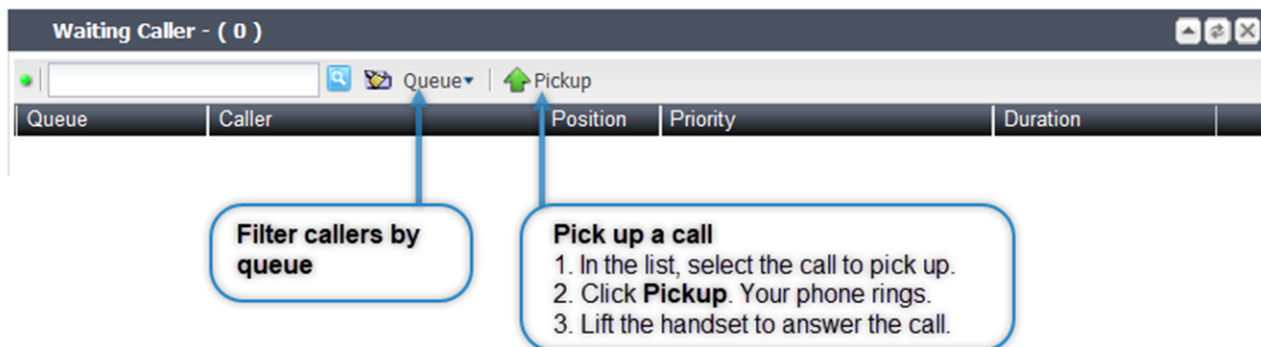
Waiting Caller

The **Waiting Caller** widget shows calls that are in a queue and waiting to be answered.

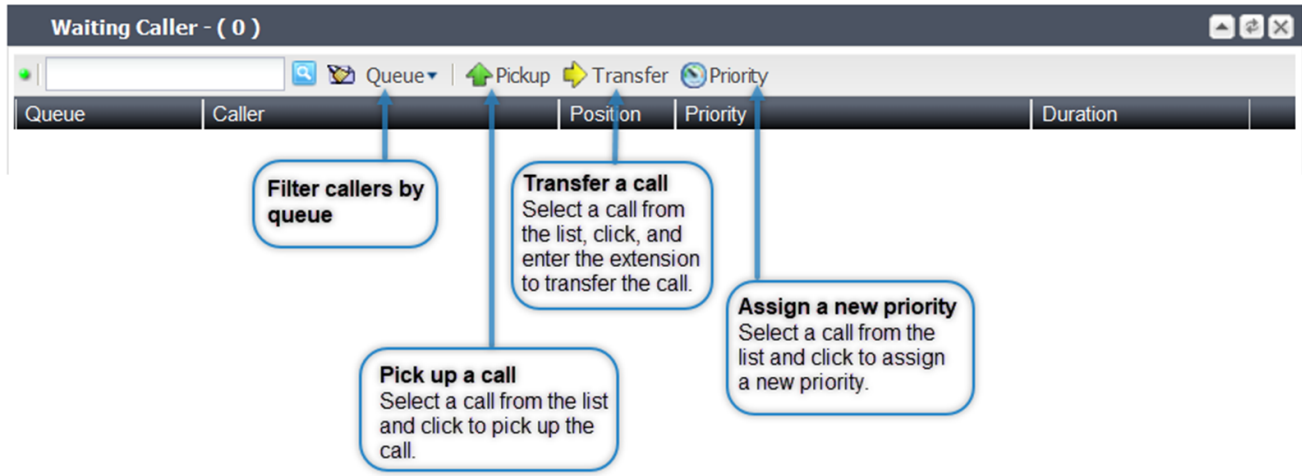
Depending on your profile, the **Waiting Caller** widget allows you to perform the following tasks:

- Filter callers by queue.
- Pick up the call of a selected caller.
- Transfer a call to another extension.
- Change the priority of a call.

Waiting Caller (agent profile view)



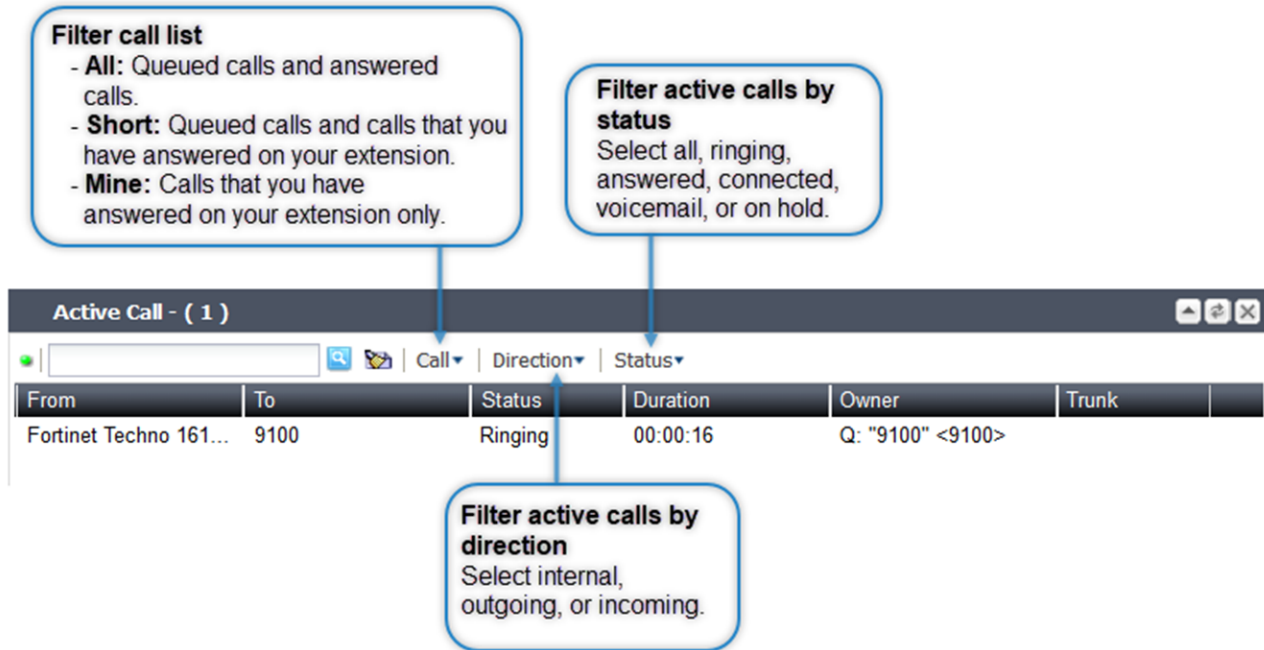
Waiting Caller (manager profile view)



Active Call

The **Active Call** widget displays all ongoing phone calls in real time.

Active Call (agent profile view)



Active Call (manager profile view)

Filter call list

- **All:** Queued calls and answered calls.
- **Short:** Queued calls and calls that you have answered on your extension.
- **Mine:** Calls that you have answered on your extension only.

Filter active calls by status

Select all, ringing, answered, connected, voicemail, or on hold.

Active Call - (1)

Monitor Call Direction Status

From	To	Status	Duration	Owner	Trunk
UNKNOWN 161322...	Support Level 1 1100	Ringing	00:05:02	Q: "Support Level 1"...	trunk_FortiCall

Monitor call

Select a call from the list and then click to select one option:

- **Coach:** To speak to the agent only while the agent is on the call.
- **Listen:** To listen to a call.

Filter active calls by direction

Select internal, outgoing, or incoming.

Active call popup



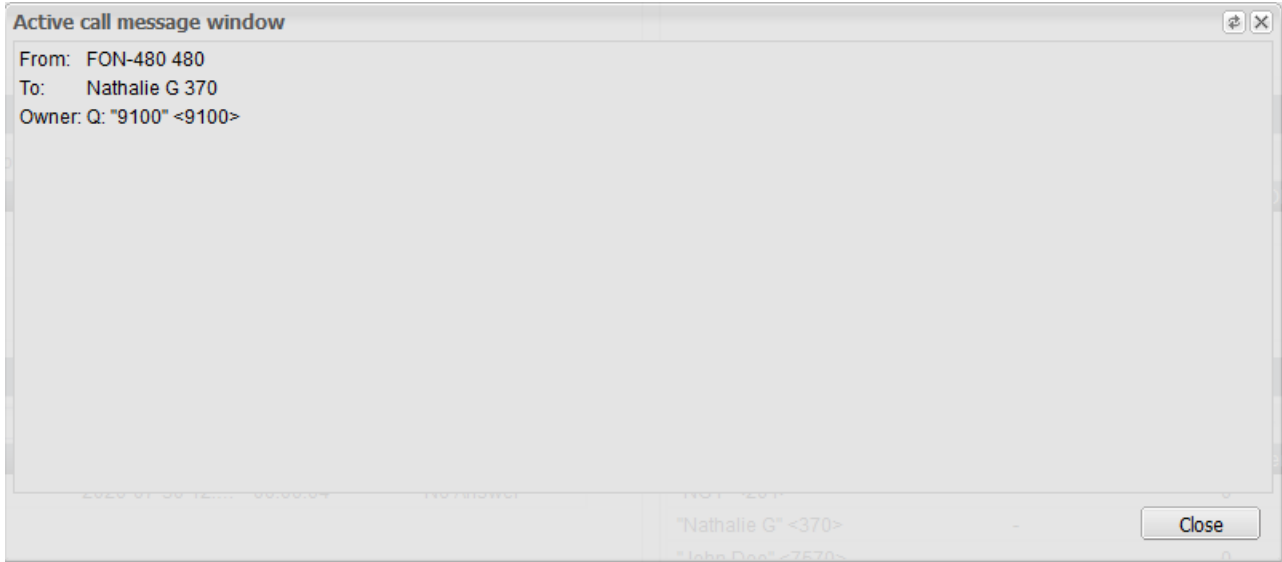
To see the active call popup, the FortiVoice system administrator must update the agent or manager profile to enable the popup active call setting

When you answer an active call, an active call window pops up.

This window displays the following details:

- From (name and extension)
- To (name and extension)
- Queue number for the owner
- IVR (interactive voice response), if available

Here is a window example of an active call popup:



Recent Calls

The **Recent Calls** widget shows a history of recent phone calls.

Recent Calls (agent and manager profiles view)

Filter recent calls by direction
 Select all, internal, outgoing, or incoming.

Filter recent calls by disposition
 Example choices are: no answer, failed, busy, answered, voicemail.

Recent Calls - (17)

Page: 1 / 0 Direction: --All-- Disposition: --All--

From (Name)	From	To (Name)	To	Start	Duration	Disposition
Arthur Curry	7205	Diana Prince	7207	2020-03-10 08...	00:00:12	Answered
Arthur Curry	7205	Diana Prince	7207	2020-03-10 08...	00:00:01	No Answer

Viewing recent call details

1. In the **Recent Calls** widget, double-click on a recent call entry.
2. You can review the call information, detail information, and call flow. Here is an example:

The screenshot displays the 'Call center console' interface with three main sections:

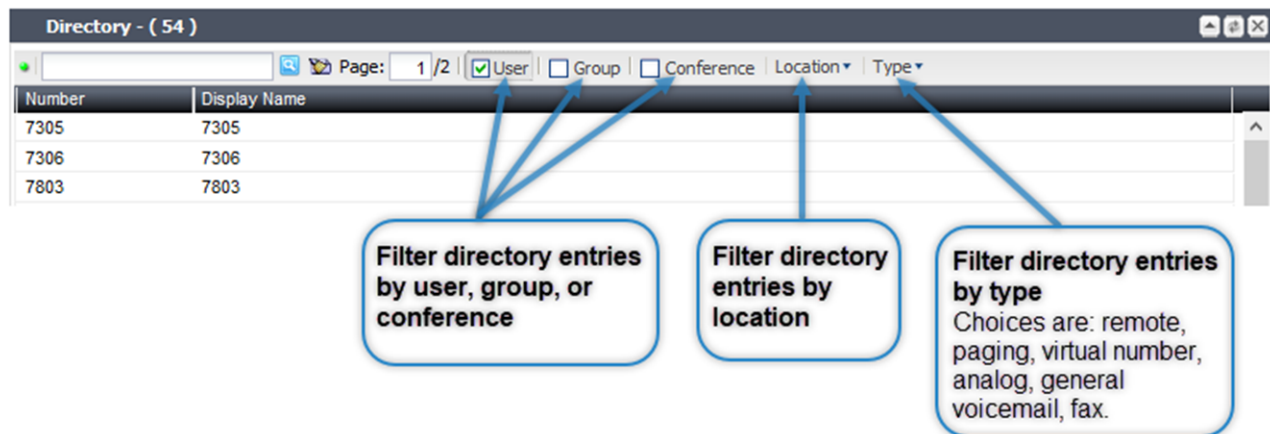
- Call Information:**
 - From: 16132259381
 - To: 370
 - Start: 2020-07-30 16:30:59
 - Real duration: 00:00:16 (16 seconds)
 - Disposition: Answered
- Detail Information:**
 - Answer: 2020-07-30 16:30:59
 - End: 2020-07-30 16:31:16
 - Source: 16132259381
 - Dialed number/DNIS: 13438821528
 - Destination: 9100
 - Trunk: 3438821528
 - Bill duration: 00:00:16 (16 seconds)
 - Direction: Incoming
 - Department:
 - Unique ID: 1596141039.30
 - Call type: Voice
 - Account code:
- Call Flow:**

Navigation: Page 1 / 1 | Records per page: 50 | Download | Total: 9

Time	Description
16:30:39	incoming call matched dialplan:FortiCall_Inbound on trunk:trunk_3438821528, caller:"Fortinet Techno" <16132259381>
16:30:45	enter auto attendant:auto_attendant_default
16:30:51	user input:3 through auto attendant:auto_attendant_default
16:30:51	deliver call to queue 9100 with priority 0
16:30:52	caller enter queue 9100 at position 1 with real priority 0
16:30:59	call picked up by 370
16:31:16	call hangup by agent 370
16:31:16	agent 370 start wrapup until 2020-07-30 16:31:16
16:31:16	call hangup by callee, status:NORMAL

Directory

The **Directory** widget shows the company directory and lists the extension (number) and display name for every entry.



Agent

With the agent profile, you can perform the following tasks in the **Agent** widget:

- View a list of agents that are members of your queue.
- Access agent details.
- Take a pause from answering calls in a queue without logging out of a queue by assigning a pause reason code. To resume taking calls again, you unpause your status.

With the manager profile, you can perform the following additional tasks in the **Agent** widget:

- Log in or log out an agent of a queue.
- If you want a logged in agent to pause from answering calls from a queue, but you do not want to log that agent out of the queue, you can pause that agent and assign a pause reason code. The agent stops receiving calls until you unpause that agent.

For more details, see also the following sections:

- [Checking the queue status on page 59](#)
- [Taking a pause from queues on page 60](#)
- [Resuming taking calls from queues on page 60](#)

Agent (agent profile view)

Pause or resume your agent status

Click to pause your logged in status for a selected queue and assign a reason code or resume your active logged in status.

FortiVoice 1000E

Queue Login Pause/Resume

Agent - (4)

Agent	Last Call	Answered	Reason	Duration	Status
"NG2" <7370>	-	0		-	Logged in
"John Doe" <7570>	-	0		-	Logged out
"Reception" <7575>	-	2		-	Logged in

Filter agents by queue

Filter agents by status

Choices are: in use, logged out, logged in, paused, wrap up, hold off, and unavailable.

Agent (manager profile view)

The screenshot shows the 'Agent - (7)' interface. At the top, there is a search bar, a 'Page: 1 / 1 Queue' indicator, and a 'Status' dropdown menu. Below the search bar are icons for 'Login', 'Logout', and 'Pause/Resume'. The main area is a table with columns: Agent, Last Call, Answered, Reason, Duration, and Status. The table contains four rows of agent data.

Agent	Last Call	Answered	Reason	Duration	Status
"Juliet Higgins" <7101>	-	0		-	Logged in
"Room 1" <1001>	-	0		-	Logged out
"Luke Fox" <7107>	-	0		-	Logged out
"Barry Allen" <7203>	-	0		-	Logged out

Filter agents by queue

Filter agents by status
Choices are: in use, logged out, logged in, paused, wrap up, hold off, and unavailable.

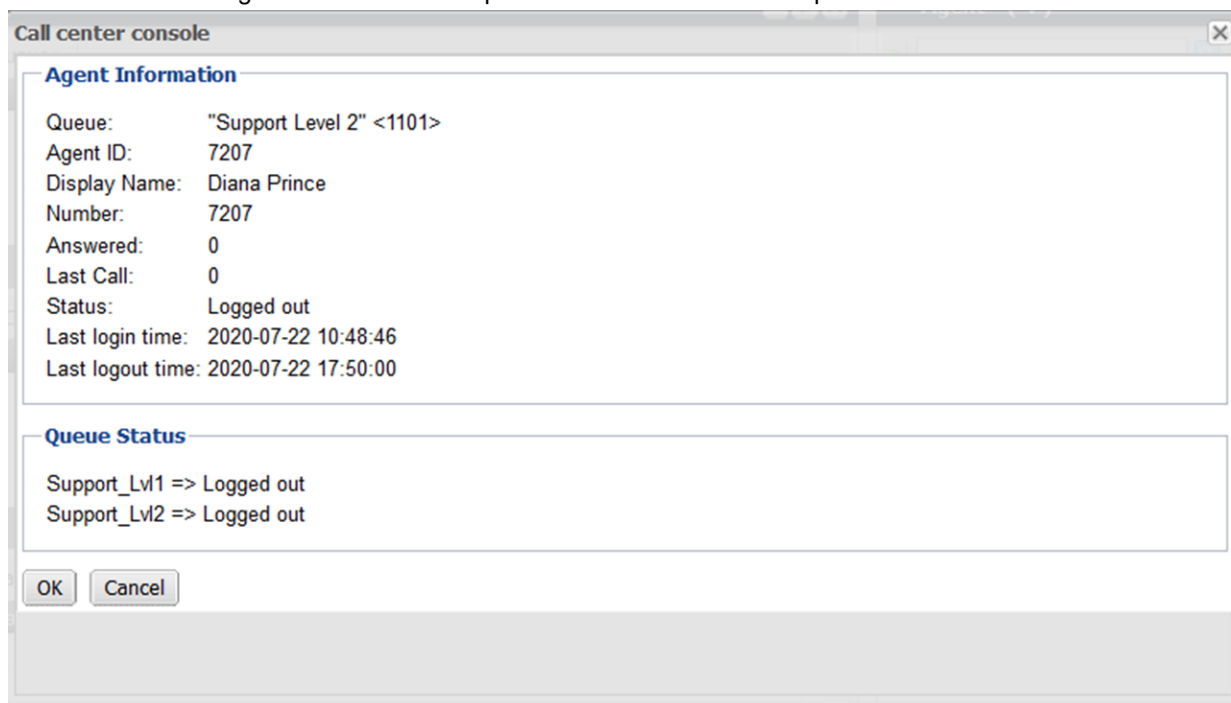
Log in an agent in a queue
Select an agent and click to log that agent in a queue.

Log out an agent of a queue
Select an agent and click to log that agent out of a queue.

Pause or resume an agent status
Select a logged in agent and click to select a queue and assign a reason code or resume normal status.

Viewing agent details

1. In the **Agent** widget, double-click on an agent.
2. You can review the agent information and queue status. Here is an example:



Queue Stat Today

With the **Queue Stat Today** widget, you get a statistics summary of the call activities for the day.

For more details about the abbreviations used in the column headings, see [Abbreviations used in the Queue Stat Today widget on page 70](#).

Queue	CT	CAn	CAb	COF	CTr	CTO	CTT	AWT	OB	OBT
"TAC_CS8000" <8000>	0	0	0	0	0	0	00:00:00	00:00:00	0	00:00:00
"TAC_CS8003" <8003>	0	0	0	0	0	0	00:00:00	00:00:00	0	00:00:00

Abbreviations used in the Queue Stat Today widget

Abbreviation	Full name
CT	Call Total
CAn	Call Answered
CAb	Call Abandoned
COF	Call Overflowed

Abbreviation	Full name
CTr	Call Transferred
CTO	Call timed out
ATT	Average Talk Time
AWT	Average Waiting Time
OB	Outbound Call
OBT	Outbound Call Average Talk Time

Queue Agent Summary

With the **Queue Agent Summary** widget, you get statistics of agent activities.

For more details about the abbreviations used in the column headings, see [Abbreviations used in the Queue Agent Summary widget on page 71](#).

Queue	AT	ALI	AAv	ATK	APS	AHD	LTT	LCW	CW
"Support Level 1" <1100>	4	2	2	0	0	0	00:00:00	00:00:00	0
"Support Level 2" <1101>	4	1	1	0	0	0	00:00:00	00:00:00	0

Abbreviations used in the Queue Agent Summary widget

Abbreviation	Full name
AT	Agent Total
ALI	Agent Logged In
AAv	Agent Available
ATK	Agent Talking
APS	Agent Paused
AHD	Agent Onhold
LTT	Longest Talk Time
LCW	Longest Call Waiting Time
CW	Call Waiting

Queue Callback List

With the **Queue Callback List** widget, the agent and manager get a list of callers that have requested to be called back instead of waiting for a prolonged hold time to speak with an agent.



For the **Queue Callback List** widget to display call information, the FortiVoice system administrator must complete the following changes on the FortiVoice phone system:

- In **Call Center > Call Queue > Call Queue**, edit the **Additional Setting** of a queue:
 - Enable **Callback Setting**.
 - Update the **Callback mode** to **Agent Call Back Manually**.

Queue Callback List (agent and manager profiles view)

The screenshot shows the 'Queue Callback List' interface. It includes a table with columns: Queue, Call ID, Caller Number, Caller Name, Callback Num..., Position, and Create Time. A callout 'Initiate a callback' points to a call in the list. Another callout 'Change refresh setting' points to a refresh icon in the top right. A third callout 'Filter callback callers by queue' points to the 'Queue' dropdown menu.

Queue	Call ID	Caller Number	Caller Name	Callback Num...	Position	Create Time
Support_Lvl1	1595600449.1...	16132259381	UNKNOWN	16132259381	1	2020-07-24 10...

Service-level alerts

When setting up a call queue, the FortiVoice system administrator can configure the FortiVoice unit to notify managers by email, phone call, or GUI pop-up window when an event occurs on the system.

The FortiVoice system administrator can configure one or more of the following events:

- **Queue overflow:** The manager receives a notification when the system reaches the maximum queue capacity. The FortiVoice system administrator configures this setting and the related overflow call handling during the queue creation.
- **Agent available ratio below:** This setting specifies a percentage for the agent available ratio. If the ratio falls below the specified percentage, the FortiVoice phone system sends an alert.
- **Caller waiting timeout:** If a call is not answered within the maximum number of minutes specified in the maximum queuing time, the FortiVoice phone system sends an alert and handles the call according to the timeout call handling setting.

- **Caller waiting over:** Specifies the maximum number of minutes that a caller can wait before the system sends an alert.
- **Number of waiting caller over:** Specifies the maximum number of waiting callers that the system can have before the system sends an alert.

Monitor view

With the **Monitor view**, you get access to a wallboard to monitor items such as queues and agent performance.



To have access to the monitoring function, the FortiVoice system administrator must update the manager profile to enable the monitoring console privilege.

This section includes the following topics:

- [Setting up the Monitor view on page 73](#)
- [Accessing the Monitor view on page 73](#)
- [Opening a wallboard in the Monitor view on page 73](#)

Setting up the Monitor view

The FortiVoice administrator accesses the FortiVoice phone system to set up the Monitor view. For more details, see the Setting up the Monitor view section in the [FortiVoice Phone System Administration Guide](#).

Accessing the Monitor view



Opening a wallboard in the Monitor view

1. Access the **Monitor view**.
2. Locate the wallboard that you want to view and click **Open**.



In the following example, the FortiVoice administrator completed the creation of two monitoring views on the FortiVoice phone system to observe the following performances:

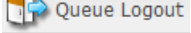
- Queue performance

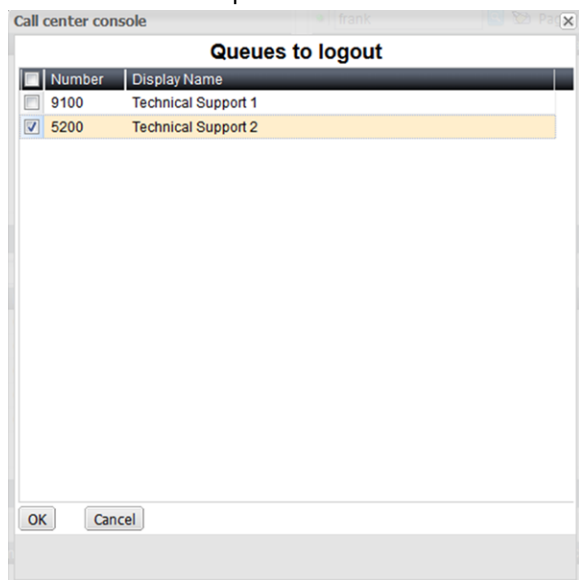
FortiVoice 200F8		Queue_Perfo...				
Help Desk 8500		Calls in Queue	Longest Waiting	Abandoned	Received Today	Answered Today
		0	0:00:00	0	1	1

- Agent performance

Help_Desk	Status	Time	Status	Time	Status	Time
Agent-1 3011	Idle	1:04:59				
Agent-2 3012	Idle	0:03:40				

Logging out of queues

1. To log out of queues, click  Queue Logout.
2. Select one or more queues.



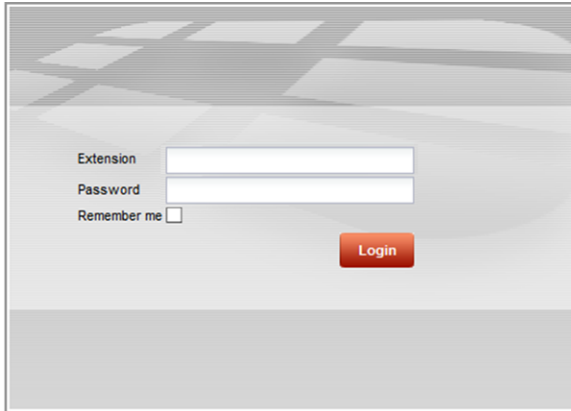
3. Click **OK**.

Logging out of the call center console

1. Click  .



2. If you are still logged in to one or more queues, follow the prompts to log out or not of the queues.
3. After completing the console logout, the following dialog box appears:



The screenshot shows a login dialog box with a light gray background and a subtle grid pattern. It contains three input fields: 'Extension', 'Password', and 'Remember me' with an unchecked checkbox. Below these fields is a red 'Login' button.



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