

Administration Guide

Organization Portal 25.2



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May 03, 2025

Organization Portal 25.2 Administration Guide

57-252-1142356-20250503

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Change Log

Date	Change Description
2025-05-03	Initial release.

Introduction

FortiCloud Organization is a centralized account management service that consolidates multiple FortiCloud accounts into Organization/Organizational Units (OUs). The service provides a single pane of visibility management across FortiCloud accounts to manage assets and cloud services, inviting accounts, hierarchical account grouping (OUs), and access roles for user permissions.

The Organization Portal includes the following features:

Create Organization

- Create a new Organization to consolidate multiple accounts.

Manage OU hierarchy

- Create a hierarchy of Organizational Units (OUs).

Invite/Join Organization

- Invite FortiCloud accounts to join the organization to manage the invited accounts.

Dashboard and visibility

- Single pane of glass visibility into your Organization resources across multiple FortiCloud accounts.



For the purpose of this document, the term "users" will be used to describe available user types, such as IAM users and external IdP roles.



Organization features defined in this guide are not available for the FortiCare Legacy portal.

What's new in version 25.2

There are no new features included in Organization Portal version 25.2. See the [FortiCloud Services Release Notes](#) for more information.

Standard versus unlimited access to the Organization Portal

The Organization Portal is available for limited, standard access for all FortiCloud users or for unlimited access for FNDN users:

Standard access

The Organization Portal is available to anyone with a FortiCloud account in a limited capacity. Standard FortiCloud accounts can access the Organization Portal.

Standard access accounts include the following limitations:

- Up to 10 member accounts can be added to the organization.
- Member accounts using real email addresses cannot be created.

See [Creating new Member Accounts on page 22](#).

Unlimited access

To access the full capabilities of the Organization Portal, the organization Root Account must have access to a basic Fortinet Developer Network (FNDN) subscription. See [Accessing Fortinet Developer Network](#) in the FortiOS Administration Guide for more information.



Accounts with a FortiCloud Premium license can also have an unlimited number of member accounts to be added to the organization until the license expires, at which point they will need FNDN access.

To register a FortiCloud Premium contract, contact a Fortinet Partner and see [Registering assets](#) in the Asset Management guide.

All Master users of the FortiCloud account can access the Organization Portal in the FortiCloud *Services* dropdown menu by selecting *Organizations*.

IAM users of the FortiCloud account will see the Organization Portal if the account has Organizations enabled and allowed access in the permission profile to the Organization Portal.

Getting started

This section outlines how to get started with the Organization Portal:

- [Key concepts on page 7](#)
- [Overview of creating and managing Organizations on page 8](#)



More information on creating and managing Organizations can be found in the [Asset Management](#) and [Identity & Access Management](#) guides.

Key concepts

Organization:

An *Organization* is a hierarchy comprised of Organizational Units (OU) and Member Accounts. Each Organization can have a maximum three levels of OUs.

Organizational Units (OU):

Organizational Units (OU) are nodes in your Organization. How you choose to define the nodes is up to you. For example, a node can be a region or a division of your company. In the Organization Portal, OUs appear as folders that contain accounts and sub-OUs.

Root Account:

The *Root Account* is the account that created the Organization. An Organization can have only one Root Account.

The Root Account user:

- Can create an IAM user and delegate permissions to manage the organization
- Is responsible for managing the entire organization
- Adds and deletes an organization and sub-OUs
- Invites members to join an organization
- Cannot be changed to a Member Account

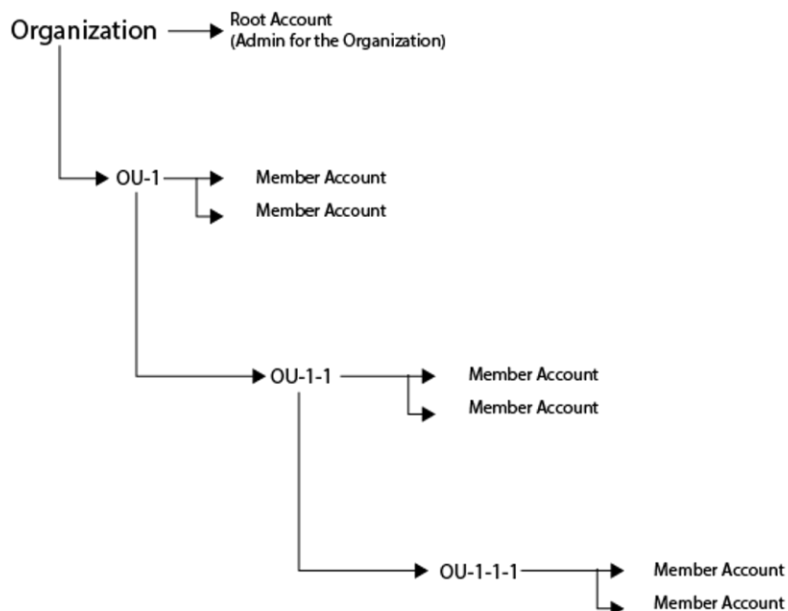
Member Account:

A *Member Account* is a FortiCloud account that joins an Organization. To join an Organization, the Member Account must accept an invitation. A Member Account can be a member of only one organization at a time.

Member Accounts:

- Cannot remove themselves from an Organization. To leave the Organization, they must request to be removed.
- Member Accounts cannot see the other members in the organization.

Example Organization structure



While the organization is divided into a hierarchy, the user location within the hierarchy is independent of their permissions. The user's access is dependent on their permission profile and scope, including the available and selected scope. For more information, see [Available and selected scope](#) in the Identity & Access Management (IAM) Guide.

Overview of creating and managing Organizations

When creating an Organization and adding Organizational Units (OUs) and Member Accounts, there is a general process that you can follow.

To create and manage an Organization:

1. [Set up the Organization on page 9.](#)
2. [Invite accounts to join the Organization on page 9.](#)
3. [Manage users on page 10.](#)
4. [Access the Organization on page 10.](#)



More information on creating and managing Organizations can be found in the [Asset Management](#) and [Identity & Access Management](#) guides.

Set up the Organization

The first step for creating an Organization requires the Root Account user to create the Organization and define the Organization hierarchy with OUs.

The process for setting up the Organization and OUs is as follows:

1. Log in to the FortiCloud account that will act as the Organization Root Account.
2. Access the Organizational portal:
 - Go to *My Account > My Account (IAM version) > Account Preferences* and click *Enable Organization Feature*. See [Enabling Organizations](#) in the Identity & Access Management guide.
 - Go to <https://support.fortinet.com/organizations/>.
3. Click *Create Organization* and follow the prompts to create the Organization. See [Creating an organization on page 12](#).
4. Go to the Organization portal and create the OUs and Organization hierarchy. See [Adding and deleting OUs on page 19](#).

See [Organizations on page 12](#) and [Organizational Units \(OU\) on page 18](#) for more information about creating Organizations and hierarchy.



The Root Account user performs all of the steps in Step One.

Invite accounts to join the Organization

Once the Organization and OUs have been created, you can invite Member Accounts to join the Organization OUs using invitation tokens.



Member Accounts can also be created directly in the Organization Portal using the New Member Account button. See [Creating new Member Accounts on page 22](#).

The process for inviting accounts is as follows:

1. The Root Account user generates the invitation token for each OU from the *Invitation Token* page. See [Creating invitation tokens on page 30](#).
2. The Root Account user invites accounts to join the Organization OUs by sharing the assigned invitation token and Organization portal link (<https://support.fortinet.com/organizations/>) with Member Account users.
3. Member Account users go to <https://support.fortinet.com/organizations/>.
4. Member Account users select *Join Organization* and use the provided invitation token to request access.
5. The Root Account user approves Member Account requests from the *Invitation Token* page. See [Invitation Approval on page 32](#).

See [Invitations on page 29](#) for more information about invitation tokens.



Member Accounts can create the account password by using the *Forgot Password?* feature when logging into the portal.

Manage users

Once Member Accounts are added to the OUs, you can create an Organization administrative IAM user that can create and manage IAM users for the Organization OUs.

The process for creating an Organization administrative IAM user is as follows:

1. Go to the IAM portal.
2. Create a new permission profile for the Organization administrative IAM user:
 - a. Go to *Permission Profiles* and create a new profile.
 - b. Set the type to *Organization*.
 - c. Add the Organization portal, IAM portal, Asset Management portal, and any other necessary portals.
 - d. Set the Organization portal, IAM portal, and Asset Management portal access to *Admin*.See [Permission profiles within Organizations](#) in the Identity & Access Management guide for more information.
3. Create the Organization administrative IAM user:
 - a. Go to *Users* and create a new IAM user.
 - b. Set the type to *Organization*.
 - c. Set the *Permission Scope* to the Organization.
 - d. Select the permission profile created in the previous step.
 - e. Generate the password.See [Creating users, user groups, and roles within Organizations](#) in the Identity & Access Management guide for more information.



The Root Account user performs all of the steps in Step Three.

Access the Organization

Once you have created the Organization administrative IAM user, you can begin accessing the Organization, OUs, assets, and so on.

The process to accessing the Organization is as follows:

1. Log into FortiCloud as the new Organization administrative IAM user:
 - a. Go to <https://support.fortinet.com>.
 - b. Log in using the new administrative IAM user credentials.
 - c. Select the top level Organization when prompted.See [Logging into an OU account](#) in the Identity & Access Management guide for more information.

2. Create permission profiles and IAM users for each of the OUs. See [Permission profiles within Organizations](#) and [Creating users, user groups, and roles withing Organizations](#) in the Identity & Access Management guide for more information.



If an IAM user has administrative access to the Organization portal and a permission scope set to an OU, this IAM user can create new IAM users below them in the hierarchy. See [Permission scope with organizations](#).

3. Access OUs or OU Member Accounts using the context switch dropdown menu:
 - Go to the Asset Management portal to switch to OU Member Accounts or OUs, view the OU consolidated view, or transfer assets across OU Member Accounts. See the [Asset Management guide](#) for more information.
 - Go to the IAM portal to manage OU Member Account users or switch to OU Member Accounts. See the [Identity & Access Management guide](#) for more information.

See [OU context switch](#) and [Permission scope with Organizations](#) in the Identity & Access Management guide for more information.



The Organization administrative IAM user performs all of the steps in Step Four. The Root Account user cannot access other OU accounts directly.

Organizations

This section contains information on:

- [Creating an organization on page 12](#)
- [Joining an organization on page 14](#)
- [Deleting organizations on page 16](#)

Creating an organization

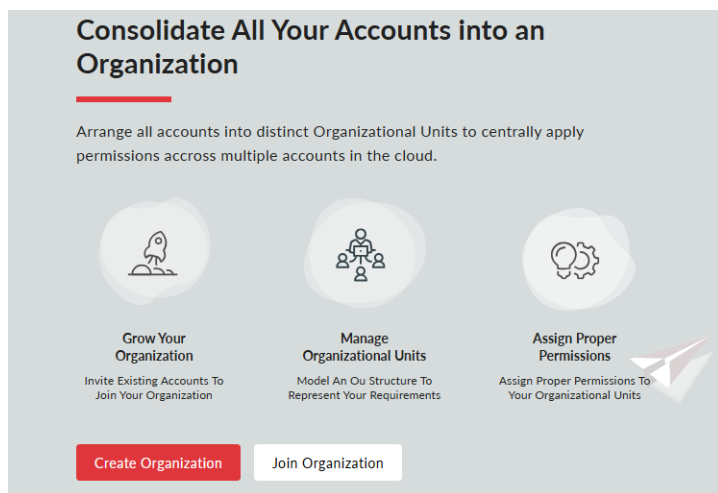
When you create an Organization your account becomes the Root Account for the organization. Users with the proper permissions can add Organizational Units (OU) and invite members to join the organization.



The Organization Portal must first be enabled by the Master user. See [Enabling Organizations](#) in the Identity & Access Management (IAM) Guide.

To create an organization:

1. In the Organization Portal (<https://support.fortinet.com/organizations/>), click *Create Organization*.



The *Master Account* page opens.

The screenshot shows the 'Create New Organization' page with a progress bar at the top indicating three steps: 1. Master Account (active), 2. Set up Organization, and 3. Complete. Below the progress bar, the title 'STEP 1 Master Account' is displayed. The text states: 'Your current account will be used as master account of the organization. Please note that the master account of an organization CANNOT be changed.' A blue box contains a note: 'A maximum of 10 accounts is allowed in your account. To gain unlimited access, please [Register FNDN](#) (Fortinet Developer Network). [Learn more](#)'. At the bottom left is a 'Cancel' link, and at the bottom right is a red 'Next' button.

2. Click *Next*. The *Set up Organization* page opens.
3. Set up your organization.

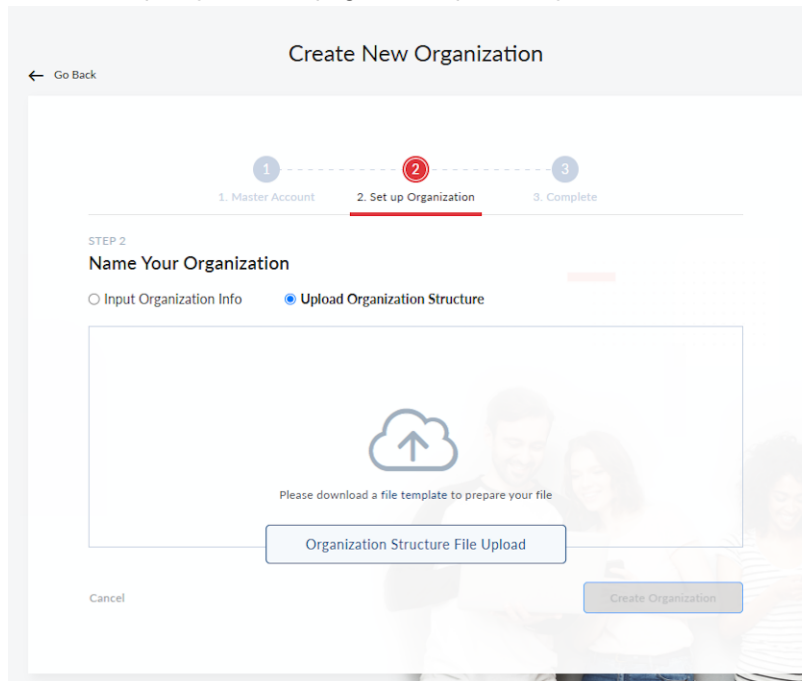
Input Organization Info	Select this option to create your organization with the GUI.
Upload Organization Structure	Select this option to create the organization and Organizational Units with an Excel sheet. See To create an organization with the Bulk Import template .
Organization Name	Enter a name for the organization.
Description	Enter a brief description of the organization.

The screenshot shows the 'Create New Organization' page with the progress bar updated: 1. Master Account, 2. Set up Organization (active), and 3. Complete. The title is 'STEP 2 Name Your Organization'. There are two radio button options: 'Input Organization Info' (selected) and 'Upload Organization Structure'. Below these are two text input fields labeled 'Organization Name: *' and 'Description:'. At the bottom left is a 'Cancel' link, and at the bottom right is a red 'Create Organization' button.

4. Click *Create Organization*. The *Complete* page opens.
5. Click *Close & Go To General*. The *General* page opens.

To create an organization with the Bulk Import template:

1. On the *Set up Organization* page, click *Upload Organization Structure*.



2. Download the *Bulk Import* template.
3. Use the template instructions to enter the OU information and create the organization hierarchy.
4. After you have completed the template, click *Organization Structure File Upload*, and upload the file.
5. Click *Confirm*.

Joining an organization

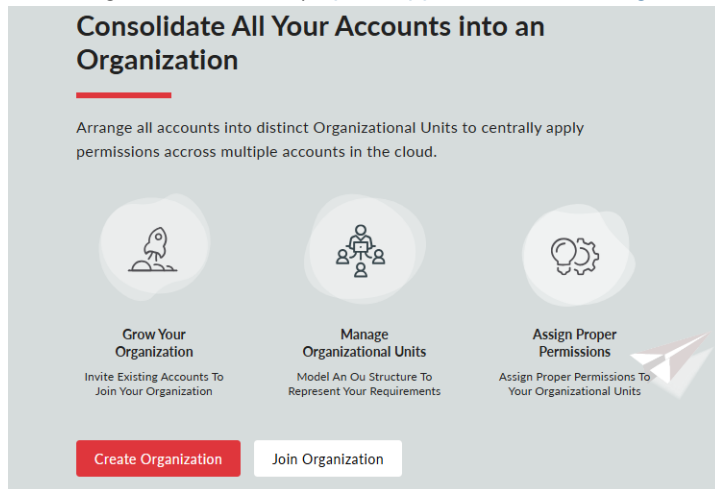
A Member Account must have an Invitation Token to join an organization. See [Invitations on page 29](#).



Member Accounts can also be created directly in the Organization Portal using the New Member Account button. See [Creating new Member Accounts on page 22](#).

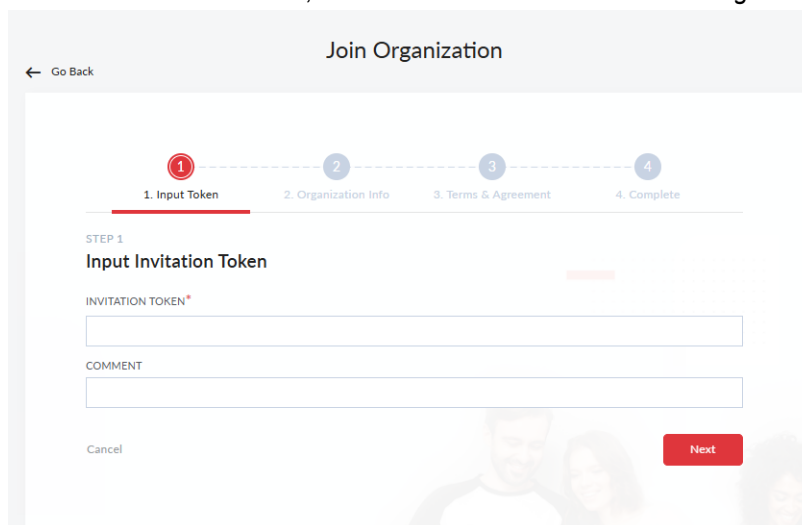
To join an organization:

1. In the Organization Portal (<https://support.fortinet.com/organizations/>), click *Join Organization*.



The *Input Invitation Token* page opens.

2. In the *Invitation Token* field, enter the token and click *Next*. The *Organization Info Preview* page opens.



3. Review the information and click *Next*. The *Terms & Agreement* page opens.
4. Read and accept the terms of the agreement and click *Next*. The *Complete* page opens.
5. Click *Close & Go to IAM*.

You will be notified when your request to join has been approved.



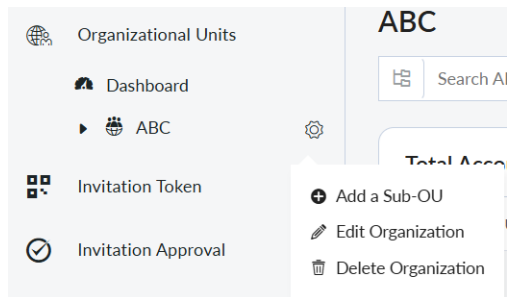
Member Accounts can create the account password by using the *Forgot Password?* feature when logging into the portal.

Deleting organizations

The Root Account user can delete an organization from the left-hand menu. Deleting the root organization is permanent and cannot be undone.

To delete an organization:

1. Hover over the organization name and click the gear icon. A dropdown list is displayed.



2. Select *Delete Organization*. A confirmation message is displayed.



Confirm to delete organization

You are about to delete your organization - **ABC**. This action cannot be undone. Are you sure you want to proceed?

☐ I confirm and accept responsibility for the deletion of the organization.

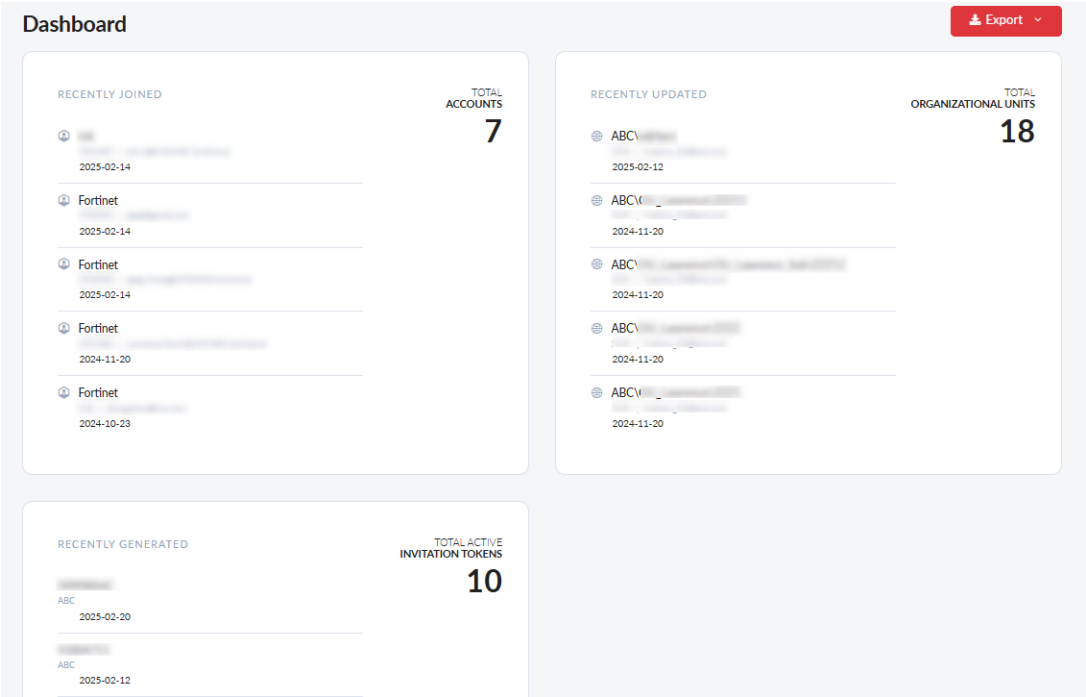
Yes, I Want To Continue.

Cancel

3. Select the checkbox to confirm you understand that the organization will be deleted.
4. Click *Yes, I Want To Continue*. The organization will be deleted.

Dashboard

If the user had proper Organization/ Organizational Unit (OU) permission, the *Dashboard* displays information about your organization. Use the dashboard to monitor the number of accounts, Organizational Units, and Invitation Tokens. The Dashboard is only visible to users with the proper permissions. The views in the account will vary depending on the scope of the user's role.



The *Dashboard* displays the following information:

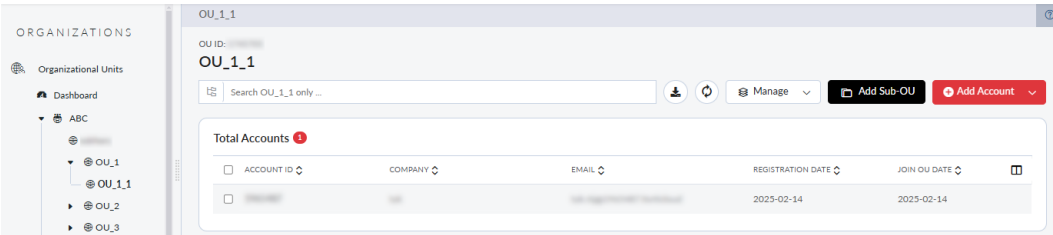
Recently Joined	Displays the accounts that joined the organization and the total number of accounts.
Recently Updated	Displays the organizations that were updated (moved, renamed, and so on) and the total number of organizations.
Recently Generated	Displays recently generated invitation tokens and the total number of active invitation tokens.

Select *Export* to export details on the OU and accounts or OU structure.

Organizational Units (OU)

Organizational Units (OU) are folders for organizing your accounts. You can create a maximum of three levels of OUs to build the structure of your organization. Users with the proper permissions can move Member Accounts between OUs and remove accounts from the organization.

Logging in as a user with the proper permissions will allow you to see OUs and Organization Portal features. Depending on the user's available scope, the user can delegate permissions to other users and define what they can access.

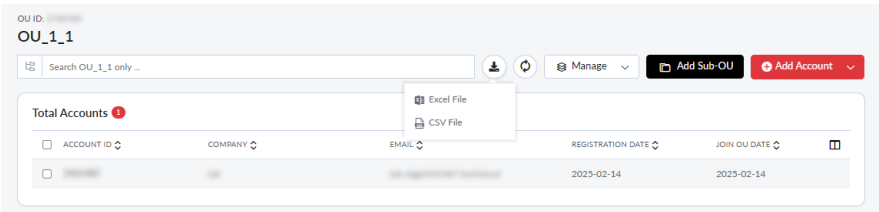


The *Organizational Units* page displays the following information:

Account ID	The ID for the Member Account.
Company	The company the account belongs to.
Email	The email address for the account.
Registration Date	The date the account was created.
Join Date	The date the account became a member of the organization.

To export the Organizational Unit:

In the banner, click *Export > Export File* or *CSV File*.



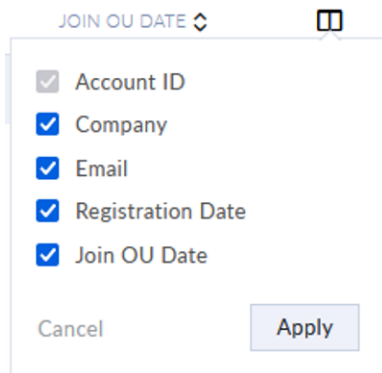
To switch views in the search field:

Click the folder icon in the search bar to include or exclude OUs in the search.



To show or hide columns:

1. At the left side of the page, click the *Select columns to display* menu.
2. Select the columns you want to hide or display and click *Apply*.

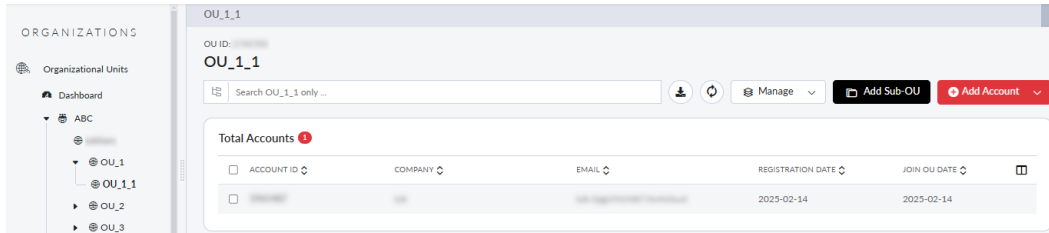


Adding and deleting OUs

You can create up to three levels of Organizational Units (OU). After the OU is created, you can edit the organization details, move the OU or delete it.

To create an Organizational Unit:

1. In the navigation menu, select the organization or OU you want to add a subOU to.



2. Click *Add Sub-OU*.
3. Select *Input Organization Info*.

Add a SubOU to OU_1_1

☒ Input Organization Info ☐ Upload Organization Structure

PARENT OU NAME: PARENT OU ID:

OU NAME*:

OU DESCRIPTION:



You can also bulk upload the organization structure using *Upload Organization Structure*. See [Updating an organization with a bulk import on page 24](#).

4. Enter the *OU Name* and *OU Description*.
5. Click *Confirm*. The unit is added to the organization.

To edit an Organization's details:

1. Click *Manage* > *Edit OU*. The *Edit <OU_name>* dialog opens.

Edit OU_1_1

OU NAME*:

OU DESCRIPTION:



If you are in a sub-OU, the button will display *Edit Sub-OU* instead.

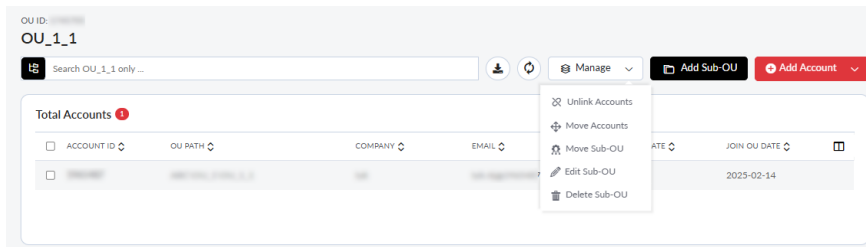
2. Update the *OU Name*, and *OU Description* and click *Confirm*.

Moving OUs

Organization Units can be moved within a organization using the *Manage* feature.

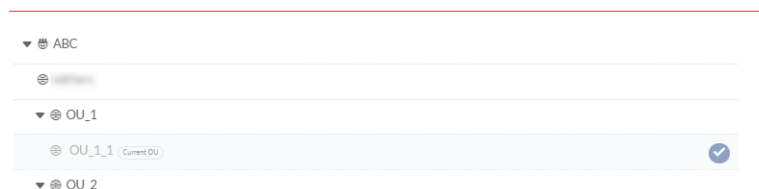
To move an Organizational Unit:

1. Navigate to the OU in the left-side menu.
2. Click *Manage* > *Move Sub-OU*.



3. Click *Select* next to the folder you want to move the OU.

Move OU_1_1 to



Deleting OUs

You can delete an organizational unit using the *Manage* feature.



You cannot delete an OU if it contains accounts. You cannot restore an OU after it is deleted.

To delete an Organizational Unit:

1. Click *Manage* > *Delete OU*. The *Confirm to delete this organizational unit* dialog opens.



Confirm to delete this organizational unit

You are about to delete your organization - **OU_2_1**. This action **CANNOT** be undone.

☐ I confirm and accept responsibility for the deletion of the organization.

Confirm

Cancel



If you are in a sub-OU, the button will display *Delete Sub-OU* instead.

- 2.** Accept the terms of the deletion and click *Confirm*.

Creating new Member Accounts

New Member Accounts can be created directly within the Root account Organization or a SubOU without an invitation token.

The new Member Account can be linked to a real email address or a new dummy email address generated at the same time as the Member Account. If you use a real email address, a notification email will be sent to the address and authentication is required. If you use a dummy email address, you cannot perform the features of a Master Account, such as resetting the password. However, the dummy account can still perform standard tasks, such as moving assets.

To create a Member Account:

1. Select the Organization or SubOU that you want to add the Member Account to.



The Organization level that you can select and add a Member Account to is dependent on your permission scope. See [Permission scope with Organizations](#) in the Identity & Access Management (IAM) guide.

The screenshot shows the 'Organizations Units' section of the interface. On the left sidebar, under 'Organizational Units', there's a tree view with 'OU_1' selected. The main panel displays details for 'OU_1'. At the top, it says 'OU ID: [redacted]'. Below that is a search bar with the placeholder 'Search OU_1 only ...'. To the right of the search bar are icons for user management and a dropdown menu labeled 'Manage'. Further right are two buttons: 'Add Sub-OU' and 'Add Account'. Below this is a section titled 'Total Accounts' with a red indicator showing 1 account. A table lists the accounts with columns for selection, account name, company, email, registration date, and join OU date.

	ACCOUNT ID	COMPANY	EMAIL	REGISTRATION DATE	JOIN OU DATE
<input type="checkbox"/>	[redacted]	[redacted]	[redacted]	2025-02-14	2025-02-14

2. Click *Add Account > Create Account*. The *New Member Account* dialog is displayed.

New Member Account

☐ I want to use a real email

• Choose an OU

ABC/OU_1

• First Name

• Last Name

Title

• Company

• Address

• Country

Select a Country

Cancel

Submit



If you have a standard account and have reached the 10 account limit, you cannot add new accounts. See [Standard versus unlimited access to the Organization Portal on page 6](#).

3. Define the Member Account's email status:

- Select *I want to use a real email* to input an existing email address. Fields are displayed to enter the email address.

New Member Account

☒ I want to use a real email

The screenshot shows a web form titled 'New Member Account'. At the top, there is a checkbox labeled 'I want to use a real email' which is checked. Below this, there are two input fields for 'Email' and 'Confirm Email'. Underneath these is a dropdown menu labeled 'Choose an OU' with 'ABC/OU_1' selected. Below the dropdown are four input fields: 'First Name', 'Last Name', 'Title', and 'Company'. At the bottom left is a 'Cancel' button, and at the bottom right is a red 'Submit' button.



Creating member accounts with a real email address is only available for accounts with unlimited access to the Organization Portal. See [Standard versus unlimited access to the Organization Portal on page 6](#).

- Leave *I want to use a real email* unselected to have a dummy email address created for the Member Account.
-



If required, the dummy email account can be converted into a real email address. Contact Fortinet Inc. Support for assistance.

4. Select the SubOU that you want the Member Account to be linked to from the *Choose an OU* dropdown menu.
5. Configure the *New Member Account* dialog fields as required.
6. Click *Submit*.
7. If the Organization Portal detects a more accurate match for the inputted address, a dialog is displayed:
 - Select *Use the suggested address and continue to next step* to replace the inputted address with the suggested address.
 - Select *Use the address you entered as is and continue to next step* to use the inputted address.
 - Select *Go back and edit the address manually* to edit the inputted address.
8. Click *Continue*.
9. If the inputted address is detected as incomplete or incorrect, a warning message is displayed:
 - Select to continue with the inputted address to ignore the message.
 - Select to return to the previous step and edit the inputted address.
10. Click *Continue*. A confirmation message is displayed.

Managing Member Accounts

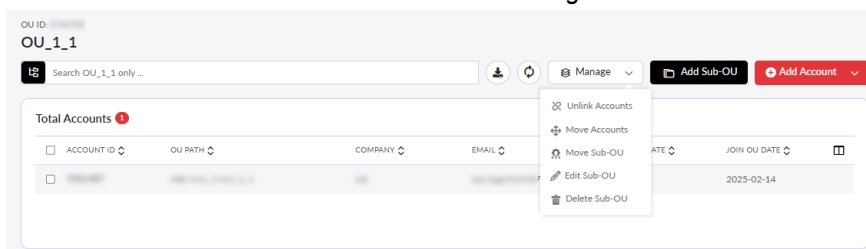
Users with the proper permissions can move a Member Account between Organizational Units.



Select multiple accounts in the list to perform a bulk removal or move a group of accounts between OUs.

To move a Member Account:

1. Select an Organizational Unit from the side menu.
2. Select a Member Account in the list and click **Manage > Move Accounts**.



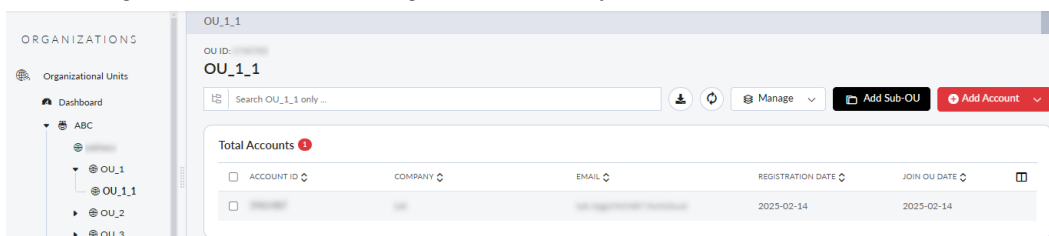
3. Select an OU from the list and click **Select**. The *Confirm to move* dialog opens.
4. Click **Confirm**.

Updating an organization with a bulk import

You can use the Bulk Import template to update the organization.

To bulk upload the organization structure:

1. In the navigation menu, select the organization or OU you want to add a subOU to.



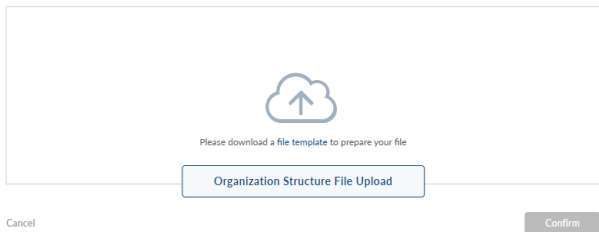
2. Click **Add Sub-OU**.

3. Select *Upload Organization Structure*.

Add a SubOU to OU_1

☐ Input Organization info

☒ Upload Organization Structure



Please download a file template to prepare your file

Organization Structure File Upload

Cancel Confirm

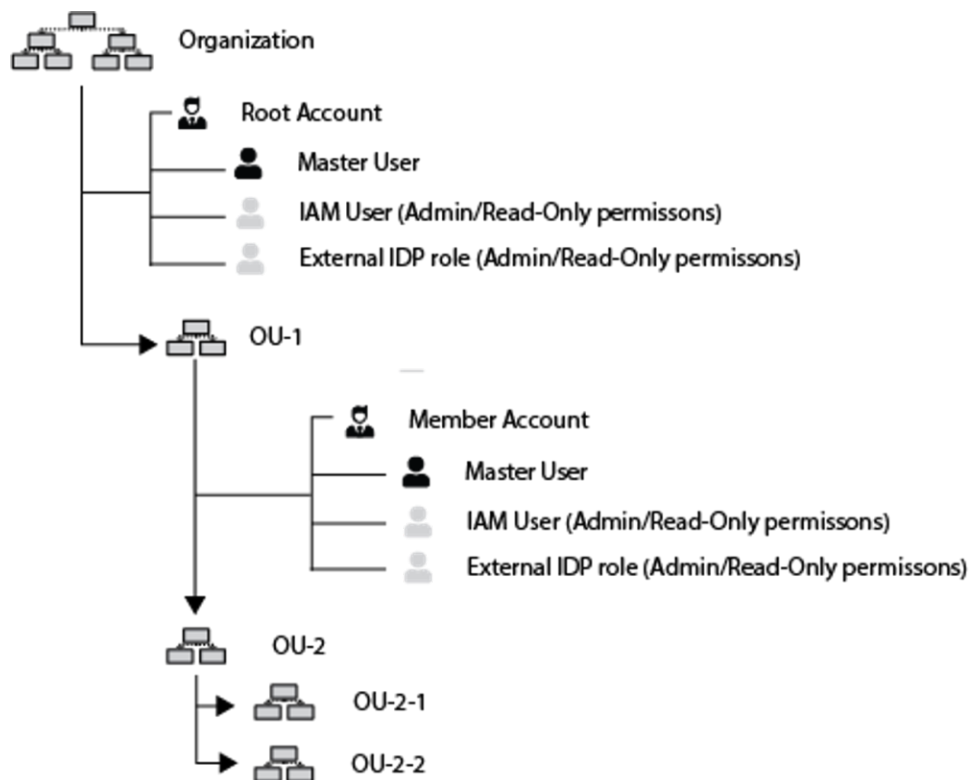
4. Select *file template* to download the template file.
5. Complete the template with your organization's information and save it.
6. Select *Organization Structure File Upload*. The File Explorer opens.
7. Select the file you want to upload and click *Open*.
8. Click *Confirm*.

User permissions

After the Master User creates the organization, they can create an IAM user with the same level of permissions. This IAM user can then be used to create other IAM users and delegate their permissions. For more information, see the [Identity & Access Management \(IAM\) Administration Guide](#).

Accounts, Users and Permissions

Account Type	This role applies to the organization. There are different types of accounts: <ul style="list-style-type: none">• Root Account: The account that created the organization.• Member Account: Accounts invited to organization with no administrative privileges
User Type	Under each account is a different type of user: <i>Master User</i> , <i>IAM User</i> , and <i>IDP role</i> .
Permissions	Each user type has permissions: Master User: <ul style="list-style-type: none">• Owns the Root Account for the Organization. IAM user and IDP role: <ul style="list-style-type: none">• Access Role permissions: <i>Admin</i>, <i>Read-Only</i>, and Not Assigned.
Access Roles	Admin access or Read-Only access within the selected account.



While the organization is divided into a hierarchy, the user location within the hierarchy is independent of their permissions. The user's access is dependent on their permission profile and scope, including the available and selected scope. For more information, see [Available and selected scope](#) in the Identity & Access Management (IAM) Guide.

Root Account

View	Action	Master User	Access Role		
		Root Account	Admin	Read Only	Not assigned
Organization	Update	✓	✓		
	Delete	✓	✓		
	Export	✓	✓	✓	

View	Action	Master User	Access Role		
		Root Account	Admin	Read Only	Not assigned
Organizational Unit	Read	✓	✓	✓	
	Add	✓	✓		
	Update	✓	✓		
	Delete	✓	✓		
	Bulk Delete	✓	✓		
	Move	✓	✓		
	Export	✓	✓	✓	
Invitation Token	Read	✓	✓	✓	
	Add	✓	✓		
	Update	✓	✓		
Invitation Approval	Read	✓	✓	✓	
	Approve	✓	✓		
	Decline	✓	✓		
General	Read	✓	✓	✓	✓
Settings	Read	✓	✓		
	Update	✓	✓		

Member Account

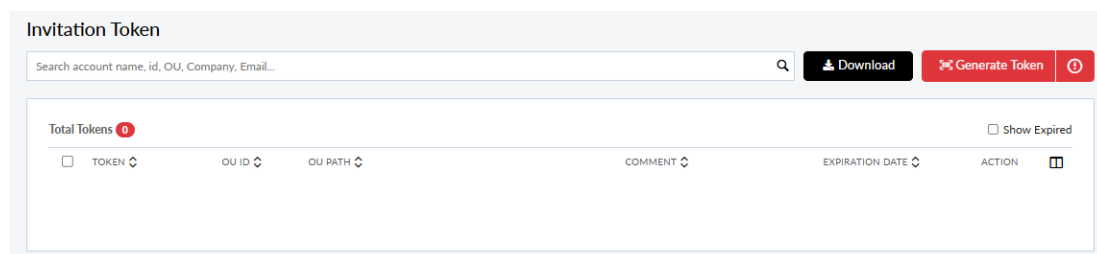
View	Action	Master	No Org Role
General	Read	✓	✓

Invitations

Invitation tokens are secure method of inviting Member Accounts to join your organization. See [User permissions on page 26](#).

After you generate a token, you can distribute it via SMS, Teams, or Slack. After a Member Account replies to the invitation, you can verify the invitation and accept or decline the response.

Invitation Tokens

The screenshot shows the 'Invitation Token' management interface. At the top, there's a search bar with the placeholder text 'Search account name, id, OU, Company, Email...'. To the right of the search bar are three buttons: 'Download' (with a download icon), 'Generate Token' (with a plus icon), and a red button with a minus icon. Below the search bar, there's a section titled 'Total Tokens' with a red circle containing the number '0'. To the right of this section is a checkbox labeled 'Show Expired'. Below this is a table with columns: 'TOKEN', 'OU ID', 'OU PATH', 'COMMENT', 'EXPIRATION DATE', and 'ACTION'. Each column has a small downward arrow icon next to its header. The table is currently empty.

The *Invitation Token* page displays the following information:

Token	The invitation token for email invitations.
OU ID	The unique ID for the invitation token.
OU Path	The OU's branch in the organization.
Comment	Any notes about the invitation token.
Expiration Date	The date the token expires.

Invitation process

1. Create an invitation token. See [Creating invitation tokens on page 30](#)
2. Send the invitation token and a link to the Organization Portal (<https://support.fortinet.com/organizations/>) to the Member Account master users. You can share the Organization Portal link by copying the URL from your browser.
3. The Member responds to the invitation by joining the organization.
4. The invitation is approved. See [Invitation Approval on page 32](#).
5. The Member Account is notified they can access the portal.



Creating invitation tokens

Create invitation tokens to invite Member Accounts through email.

To create an invitation token:

1. Go to the *Invitation Token* page and click *Generate Token*. The *Generate Token* dialog opens.

Generate Token

CHOOSE AN ORGANIZATION

ABC

▼

TOKEN EXPIRY DATE

2025-02-25

📅

COMMENT

Generate a separate token for each Sub-OU

☐

Cancel

Generate Token



If you have a standard account and have reached the 10 account limit, the *Generate Token* button will be grayed out. See [Standard versus unlimited access to the Organization Portal on page 6](#).



Invitation token can also be generated by selecting an Organization or Organizational Unit in the left-side menu and clicking *Invite*.

2. Configure the token settings:

Choose An Organization	Select the Organization or OU from the dropdown.
Token Expiry Date	Click the calendar icon to select the token expiry date.
Comment (Optional)	Enter a description of the token.
Generate a separate token for each Sub-OU	Enable this option to create unique token for each OU in the organization.

3. Click *Generate Token*.

To download a token:

1. Go to the *Invitation Token* page and select a token in the list.
2. Click *Download* to save it to your computer as an Excel file.

To edit the token expiration date:

1. Go to the *Invitation Token* page.
2. Click the *Edit* icon next to the token *Expiration Date*.

Invitation Token

Search account name, id, OU, Company, Email...

[Download](#) [Generate Token](#) [?](#)

Total Tokens 1 Show Expired

TOKEN	OU ID	OU PATH	COMMENT	EXPIRATION DATE	ACTION
[Token ID]	[OU ID]	ABC		2025-02-25	Edit Token Expiry Date

3. In the *Token Expiry Date* field, set the new expiry date.

Edit Token Expiry Date

TOKEN [Token ID] OU ID [OU ID]

TOKEN EXPIRY DATE [?](#)

COMMENT

[Cancel](#) [Save Change](#)

4. Click *Save Change*.



One token can be used for multiple Member Accounts to join the Organization under the same location.

Invitation Approval

After the invitation token has been sent, the recipient can then use it to join the organization. When they request to join the organization, the request will appear on the *Invitation Approval* page, which displays the generated tokens and the accounts that received an invitation. Use the *Invitation Approval* page to approve the invitation response.

Invitation Approval

Search

Decline

Approve

TOKEN	OU ID	OU PATH	COMMENT	# OF ACCOUNT REQUESTED	# OF ACCOUNT PENDING FOR APPROVAL	EXPIRATION DATE	
123456789	ABC	ABC		0	0	2024-08-13	
▶ 123456789	ABC	ABC\OU		1	0	2024-08-20	
123456789	ABC	ABC		0	0	2024-08-25	
▶ 123456789	ABC	ABC\OU		1	0	2024-08-28	
▶ 123456789	ABC	ABC		1	0	2024-08-31	

The *Invitation Approval* page displays the following information.

Token	The Invitation Token number.
OU ID	The Organizational Unit ID.
OU Path	The Organizational Unit name and the sub-OU.
Comment	Comments entered when the token was created.
# of Accounts Requested	Number of accounts submitted a joined organization request.
# of Accounts Pending Approval	The number of accounts that have not been approved.
Expiration Date	The token expiry date.

To approve an invitation:

- 1. Go to *Invitation Approval* and expand a token in the list.
- 2. Select an invitation and click *Approve*.
The *Confirm to approve* dialog opens.



If you have a standard account and have reached the 10 account limit, the *Approve* button will be grayed out. See [Standard versus unlimited access to the Organization Portal on page 6](#).

- 3. Select the acknowledgment.
- 4. Click *Confirm*.



You can also approve the invitations in bulk by clicking the *Select all* checkbox at the top of the list.

General

The *General* page displays information about the account.

General

ORGANIZATION NAME
ABC

ORGANIZATION ID
123456789

DESCRIPTION
ABC Organization Description

REGISTRATION DATE
2024-08-12

COMPANY
Fortinet

MASTER ACCOUNT EMAIL
admin@fortinet.com

The *General* page displays the following information:

Organization Name	The name of the parent organization.
Description	The description of the organization.
Master Account Name	The name of the master account.
OU Path	The Organizational Unit's branch in the organization hierarchy.
Organization ID	The organization's unique ID.
Registration Date	The date the organization was created.
Master Account Email	The email address of the master account.

Settings

The *Settings* page is used to manage the Organization settings.

Use the *Settings* page to enable the following settings:

Hide Organization Info for managed account	Hides the Organization link in the <i>Assets & Accounts</i> menu in Member accounts.
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