



# FortiVoice™ Phone System 5.3.0 User Guide



## FortiVoice Phone System 5.3.0 User Guide

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# Using FortiVoice user web portal

FortiVoice user web portal is a special web site located on a FortiVoice unit. This web portal allows you to:

- check your voicemail including playing, deleting, or saving the voicemails
- receive and send fax
- check your call record for received, placed, or missed calls
- check your recorded calls including playing, deleting, or saving the voicemails
- view your corporate phone directory
- check the feature codes that you can dial on your phone keypad
- configure your extension according to your preferences
- manage calls
- configure phone profiles
- customize sound files
- set phone call reminders
- use the operator console to process organization calls
- use the call center console to process call queues

Several modern, popular web browsers are supported, so you can use FortiVoice user web portal through the web browser of your choice.

To access FortiVoice user web portal, in your browser's location or address bar, enter the URL that was provided to you by your network administrator. You will need your extension number and voicemail PIN to log into the portal.

This topic includes:

- [Managing voicemail](#)
- [Working with fax](#)
- [Managing recorded calls](#)
- [Checking call records](#)
- [Viewing corporate directory](#)
- [Managing calls](#)
- [Customizing sound files](#)
- [Viewing feature access codes](#)
- [Configuring phone profiles](#)
- [Setting a reminder](#)
- [Choosing extension preferences](#)
- [Using the operator console](#)
- [Using the call center console](#)

## Managing voicemail

*Voicemail > Inbox/Old* menu displays all of your voicemails including urgent and old ones. You can select a voicemail and click *Play* to listen to it, *Stop* to pause it, *Delete* to remove it, or *Download* to save it.

## Working with fax

You can send and receive faxes using the portal. If your administrator enables you to monitor a fax extension, you can also manage all of the faxes received on that fax extension.

To view and download a fax received on your extension, go to *Fax > Inbox*.

To view and download a fax sent from your extension, go to *Fax > Sent*.

To send a fax, go to *Fax > Sent*. Click *New* and configure the following:

| <b>GUI field</b>           | <b>Description</b>   |
|----------------------------|--|
| <b>To</b>                  | Enter the fax number to which you want to send the fax.                    |
| <b>Header information:</b> | Enter the fax header such as receiver's name, subject, or number of pages. |
| <b>Attachment type</b>     | Select the fax attachment type.  |
| <b>Attachment</b>          | Click <i>Browse</i> to locate the fax you want to send.                    |
| <b>Send</b>                | Click to send the fax.   |

To monitor a fax extension, go to *Fax > Monitor*. Click the fax you want to monitor. You can view, delete, resend, forward, and download a fax sent to this fax extension.

## Managing recorded calls

The *Call Recording* menu displays all of your recorded calls. You can select a call and click *Play* to listen to it, *Stop* to pause it, *Delete* to remove it, or *Download* to save it.

You can record a call by entering the call recording feature code on the keypad while in call. For information on the feature codes, see [“Viewing feature access codes” on page 6](#).

## Checking call records

The *Call Log/CDR* (Call Detail Record) menu displays all your phone call records, including the time of the call, the caller and receiver, the call duration, the call status, and the call direction.

You can filter the call records display by clicking the *Search* button and enter criteria that records must match in order to be visible. You can also save the call records by clicking the *Download* button.

To view missed calls, go to *Call Log/CDR > Missed*.

To view received calls, go to *Call Log/CDR > Received*.

To view placed calls, go to *Call Log/CDR > Placed*.

## Viewing corporate directory

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

You can call an extension by double-clicking it.

## Managing calls

*Call Handling* 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.

### To manage a call

1. Go to *Call Handling*.
2. Select a call status at the top of the page.  
Each status can only be used for one call management configuration.  
If you select *Black List*, the call management configuration will apply to the numbers added in the *Black List* configuration. See [“Black List” on page 13](#).
3. For *Call Process*, select *System default action* or *User defined action*.  
The *System default action* changes depending on the status selection.
4. If you select *User defined*, click *New* to define a call process according to a schedule.
  - Select a default *Schedule* for the call action. You can click *View* to display the schedule details.
  - Select an *Action* for the call process. You can select multiple actions to process a call in sequence. For example, you can select *Play announcement* and then *Auto attendant*. In this case, an incoming call will be transferred to the auto attendant after an announcement is played.  
*Default action* is equal to the action when you select *System default action* under *Call Process*.
    - If you select *Follow me*, select a follow me profile. For information on configuring follow me, see [“Follow Me” on page 13](#).  
This option is available only if your administrator enables call forwarding in your extension’s user privilege.
    - If you select *Play announcement*, select a sound file. For information on configuring sound files, see [“Customizing sound files” on page 5](#).
    - If you select *Auto attendant*, select a default auto attendant.
    - If you select *Forward*, enter the number to which you want to forward the call.  
This option is available only if your administrator enables call forwarding in your extension’s user privilege.
  - Click *Create*.
5. Click *OK*.

## Customizing sound files

You can make sound files to be used in call management when you select the *Play announcement* action in call process configuration. For details, see [“Customizing sound files” on page 5](#).

### To customize a sound file

1. Go to *Custom Sounds > Custom Sounds*.
2. Click *New*.
3. Enter a name for the sound file.

4. For *Action*, click *Call me* to ring your extension and record an announcement using the phone. Click *Upload* to import an announcement and *Download* to save an announcement.

## Viewing feature access codes

By default, the FortiVoice unit has defined the following codes for you to access certain features by dialing the codes on your phone keypad. Your administrator may have redefined the codes.

Go to *Feature Code Index* and view the codes and their descriptions.

The default codes include:

| Code       | Description  |
|------------|--|
| <b>**</b>  | <p>Direct Inward System Access (DISA) service allows external users to dial into PBX and use PBX service just like the local extensions.</p> <p>To use DISA, dial the PBX main number and then **. The PBX will prompt you to enter the account code assigned by your administrator. Once you pass authorization, you can use PBX service just like a local extension.</p> |
| <b>*1</b>  | <p>During a call, dial *1 and then the extension number of a second person to transfer the call to the person without talking to the person.</p>   |
| <b>*10</b> | <p>Hot-desking refers to the sharing of one phone by multiple users at different time periods.</p> <p>Dial *10 to check hot desk login status including login expiry time.</p>   |
| <b>*11</b> | <p>Hot-desking refers to the sharing of one phone by multiple users at different time periods. Each user can log into the phone by pressing *11 and enter his extension number and voicemail PIN following the prompts.</p>  |
| <b>*12</b> | <p>To log out hot desking, press *12 and enter your extension number and voicemail PIN.</p>  |
| <b>*15</b> | <p>This code is used to remove the extension number of a FortiFone by the administrator.</p> <p>Dial *15 on any FortiFone that connects to the FortiVoice unit and enter the administrator PIN.</p>  |
| <b>*16</b> | <p>This code is used to remove the extension number of a FortiFone.</p> <p>Dial *16 on your FortiFone that connects to the FortiVoice unit and enter the voicemail PIN.</p>  |
| <b>*17</b> | <p>This code is used to set an extension number for a FortiFone by the administrator.</p> <p>Dial *17 on any FortiFone that connects to the FortiVoice unit and enter the administrator PIN. You can then enter an existing extension to set it as the extension of this phone.</p>  |

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| <b>*18</b>  | <p>This code is used to set an extension number for a FortiFone by a phone user.</p> <p>Dial *18 on any FortiFone that connects to the FortiVoice unit and enter the voicemail PIN provided by the administrator. You can then enter an existing extension to set it as the extension of this phone.</p> |
| <b>*2</b>   | <p>During a call, dial *2 and then the extension number of a second person to transfer the call to the person. Since you want to inform the second person about the call, you can have a private conversation with the person without the first person who made the call hearing it.</p>                 |
| <b>*3</b>   | <p>Dial *3 to record a phone conversation.</p> <p>Before doing so, have the agreement of the person you talk with or check your local laws regarding phone recording.</p>  |
| <b>*4</b>   | <p>Dial *4 to park a call.</p>   |
| <b>*411</b> | <p>Dial *411 to access the phone directory where you can look for an extension by entering a person's name.</p>  |
| <b>*5</b>   | <p>Dial *5 to monitor a call by listening to it. You also need to enter your voicemail PIN.</p>  |
| <b>*61</b>  | <p>Dial *61 to log into the queues of which your extension is a member.</p>  |
| <b>*62</b>  | <p>Dial *62 to log out of the queues of which your extension is a member.</p>  |
| <b>*63</b>  | <p>Dial *63 and enter your voicemail password and the queue extension to log into this queue.</p> <p>The voicemail password is required only if this option is selected for your extension by the administrator.</p>   |
| <b>*64</b>  | <p>Dial *64 and enter your voicemail password and the queue extension to log out of this queue.</p> <p>The voicemail password is required only if this option is selected for your extension by the administrator.</p>   |
| <b>*65</b>  | <p>Dial *65 and enter your voicemail password to login all members of a queue of which your extension is a member.</p> <p>The voicemail password is required only if this option is selected for your extension by the administrator.</p>  |
| <b>*66</b>  | <p>Dial *66 and enter your voicemail password to logout all members of a queue of which your extension is a member.</p> <p>The voicemail password is required only if this option is selected for your extension by the administrator.</p>   |
| <b>*67</b>  | <p>Dial *67 and enter your voicemail password and the reason code to pause all queues of which this extension is a member.</p>   |
| <b>*68</b>  | <p>Dial *68 and enter your voicemail password and the reason code to unpause all queues of which this extension is a member.</p>   |

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|---------------|--|
| <b>*72</b>    | Dial *72 followed by 1, 2, or 3 and enter your voicemail password to temporarily replace the original personal schedule with one of the three default ones. You may also modify the temporary schedule. Dial *720 to go back to the original schedule.                               |
| <b>*75</b>    | Dial *75 and enter a maid code to show the room cleaning status.   |
| <b>*77</b>    | Dial *77 and enter a time for a wake-up call. The time format should be in the format of hhmm. For example, 15:30 is entered as 1530.  |
| <b>*78</b>    | Dial *78 to turn on the Do Not Disturb service. Callers will hear the busy sound when they dial your number.   |
| <b>*79</b>    | Dial *79 to turn off the Do Not Disturb service. Otherwise, callers will hear the busy sound when they dial your number.   |
| <b>*80</b>    | As a pickup group member, you can dial *80 on your phone to pick up a call from any ringing extension.   |
| <b>*81</b>    | As a pickup group member, you can dial *81 or the code you set on your phone followed by a ringing extension number to pick up a call from that extension.   |
| <b>*82</b>    | An administrator with the privilege can dial *82 followed by 1, 2, or 3 and the administrator PIN to temporarily replace the original system schedule with one of the three default ones. You may also modify the temporary schedule. Dial *820 to go back to the original schedule. |
| <b>*92</b>    | Dial *92 and an extension to intercom that extension.  |
| <b>*97</b>    | Dial *97 from your own phone and then enter your voicemail password to directly access your voice mailbox.   |
| <b>*98</b>    | Dial *98 from any extension and then enter your extension number and voicemail password to access your voice mailbox.  |
| <b>0</b>      | Dial 0 to access the operator.   |
| <b>DNDTGL</b> | This is for supporting the DND key on the FortiFones. Press the DND key on the FortiFone to turn DND on or off.  |
| <b>UNPARK</b> | This is for supporting the Unpark key on the FortiFones. Press this key on the FortiFone to unpark a call.   |

## Configuring phone profiles

This option is only available for FortiFone 260i and above.

Phone profiles contain the phone configurations that are mostly used and customized, such as the programmable phone keys. Phone profiles make extension configuration more flexible because phone users are allowed to choose the profile they want. In addition, any changes the administrator makes to a profile is automatically applied to the extensions that use the profile.

If your administrator has applied an administrator defined phone profile to your extension, you can only view your phone profile. If your administrator has applied a user defined phone profile to your extension or you choose *User defined* phone profile in “[Choosing extension preferences](#)” on [page 10](#), you can configure your phone profile.



### To configure a phone profile

1. Go to *Phone Profile*.
2. Configure the following:

| <i><b>GUI field</b></i>           | <i><b>Description</b></i>  |
|-----------------------------------|--|
| <b>Automatic Configuration</b>    |  |
| <b>Display option</b>             | Select what to display on the extension: your name only or name and number.  |
| <b>Set Programmable Phone Key</b> | <p>Allows you to program the phone keys for FortiFone-260i to 560i. For FortiFones with expansion modules, you can select the module to program the keys.</p> <p>After completing programing the keys, you can click <i>Download printable label</i> to save and print out the configuration and label it on the phone.</p> <p>Note that keys 1 and 2 are reserved and cannot be programmed.</p> <p>If you select <i>One key dial</i> or <i>User defined</i> function for a key, you need to enter the information in the <i>Resource</i> field based on your phone configuration. For example, if you select <i>User defined</i> for key 3 and you want to map this key to your voicemail code such as *78, enter *78 in the <i>Resource</i> field.</p> |

3. Click *Apply*.

## Setting a reminder

You can schedule daily events and send event reminders. One reminder record can contain multiple reminder events.

### To schedule an event

1. Go to *Reminder* and click *New*.
2. Configure the following:

| <i><b>GUI field</b></i> | <i><b>Description</b></i>                           |
|-------------------------|---|
| <b>Title</b>            | Enter a name for the reminder event.                |
| <b>Location</b>         | Enter the location for the event.                   |
| <b>Start time</b>       | Specify when the event starts.                      |
| <b>Recurrence</b>       | Click <i>None</i> to configure recurrence settings. |
| <b>Description</b>      | Enter any notes as required.                        |

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|-----------------------|--|
| <b>Guest</b>          | <p>Click <i>Add</i> to select the internal and external phone numbers to which you want to send event reminder calls.</p> <p>If you want to delete a number, select the number and click <i>Remove</i>.</p>  |
| <b>Reminder audio</b> | <p>Configure the reminder audio that are sent to the selected guest phones.</p> <ul style="list-style-type: none"> <li>• <i>Default</i>: The reminder audio will be a beep sound.</li> <li>• <i>Create New</i>: Click to customize the reminder audio. For <i>Action</i>, click <i>Call me</i> to record a message from an extension; <i>Upload</i> to look for an existing reminder audio; and <i>Download</i> to save the audio file. For <i>Extension</i>, if you select <i>Call me</i> for <i>Action</i>, select the extension on which you want to record a message.</li> <li>• Click <i>Create</i> and <i>Create</i> to exit.</li> </ul> |

## Choosing extension preferences

The *Preferences* menu lets you customize your extension settings, including basic settings, sound files, web user portal display, speed dial, voicemail PIN, phone transfer, phone number black list, and phone profile.

### To set extension preferences

1. Go to *Preferences > Preferences*.
2. Configure the following:

| <b>GUI field</b>           | <b>Description</b>  |
|----------------------------|---|
| <b>Settings</b>            |   |
| <b>Number</b>              | Displays your extension number. This is view-only.  |
| <b>Display name</b>        | Displays the caller ID on the extension. This is usually the name of the extension user and is view-only.   |
| <b>Emergency caller ID</b> | Enter the caller ID to display on the destination phone when you dial emergency number such as 911.   |
| <b>External caller ID</b>  | <p>If you want to display a particular caller ID on a called phone instead of the FortiVoice main number or the trunk phone number, enter it here. The format must be <code>name&lt;phone number&gt;</code>, such as <code>jdoe&lt;2221111234&gt;</code>.</p> <p>If you are not sure about this feature, contact your administrator for more information.</p> |
| <b>Ring duration</b>       | Enter the phone ringing duration in seconds before an incoming call goes to voicemail.  |
| <b>Call forward</b>        | Select to forward phone calls and enter the phone number to forward the calls.  |
| <b>Call waiting</b>        | Select to enable call waiting.  |

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|--|--|
| <b>Do not disturb</b>  | Select to enable DND.  |
| <b>Message waiting indication</b>                              | Select to enable phone indication that a message is received.  |
| <b>Voicemail handling (Caller press 0 during announcement)</b> | Select to allow a caller to press 0 to talk to the operator during announcement.   |
| <b>Notification Options</b>                                    |  |
| <b>Voicemail</b>   | <p>Select the type of email notification when this extension has a voicemail:</p> <ul style="list-style-type: none"> <li>• <i>None</i>: Do not send any notification.</li> <li>• <i>Simple</i>: Send an email notification.</li> <li>• <i>Attachment</i>: Send an email notification with the voicemail attached.</li> </ul> |
| <b>Fax</b>   | <p>Select the type of email notification when this extension has a fax:</p> <ul style="list-style-type: none"> <li>• <i>None</i>: Do not send any notification.</li> <li>• <i>Simple</i>: Send an email notification.</li> <li>• <i>Attachment</i>: Send an email notification with the fax attached.</li> </ul>             |
| <b>Missed call</b>   | Select <i>On</i> if you want to send an email notification when an incoming call is missed.  |
| <b>Email address</b>   | Enter the email address(es) to which the email notifications for voicemails, faxes, or missed calls are sent.  |

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## **Voicemail Options**

Configure greeting, unavailable, and busy messages.

*Name:* Your name of the voicemail. For example, John Doe.

- *Default:* Use the system default name for the voicemail. This will be the extension number.
- *Personal:* Use your own name for the voicemail.
  - Click *Call me* to ring your extension and record a name using the phone, such as your name or extension number.
  - Click *Upload* to import a name, such as your name or extension number.
  - Click *Play* to listen to a recorded name.
  - Click *Erase* to delete a recorded name.
  - Click *Download* to save a recorded name.

*Greeting:* Select the voicemail greeting mode and greeting content.

- *Default:* The system defined greeting.
- *Simple:* The customer-recorded greeting that applies to any time.
- *Scheduled:* The customer-recorded greeting that comes with a schedule.
- *Audio file:* Click to configure the greeting. This option is only available when you select *Simple* or *Scheduled*.
  - Click *Call me* to ring your extension and record a message such as a greeting, unavailable, or busy message using the phone. This applies to the *Simple* and *Scheduled* modes.
  - Click *Upload* to import a message such as a greeting, unavailable, or busy message.
  - Click *Play* to listen to a message such as a greeting, unavailable, or busy message.
  - Click *Erase* to delete a message such as a greeting, unavailable, or busy message.
  - Click *Download* to save a message such as a greeting, unavailable, or busy message.

If you select *Scheduled* for *Greeting*, click *New* to add a system schedule or create a new one. You can also add a greeting which is the audio file you configured when clicking *Audio file*.

The purpose of having a separate voice mail name file is for occasions that you just want to change the name without touching the greeting file.

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## **Display Preference**

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### **Default portal**

Select the default user web portal.

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### **Prompt language**

Select the prompt language for the extension. The default is English.

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|   |  |
|---|--|
| <b>Web GUI language</b>                         | Select the language for the user web portal.   |
| <b>Theme</b>                                    | Select the display theme for the user web portal.  |
| <b>Time zone</b>                                | Select the time zone for the user web portal.  |
| <b>Account Management</b>                       | Click <i>Change Voicemail PIN Number</i> to change the password for accessing the voice mailbox and the user web portal.   |
| <b>Agent</b>                                    |  |
| <b>PIN required to login/logout from phone</b>  | <p>Select to enable an agent to log into/log out of a queue from the extension using the user PIN.</p> <p>For information on feature access codes, see <a href="#">“Viewing feature access codes” on page 6</a>.</p>   |
| <b>PIN required to pause/unpause from phone</b> | <p>Select to enable an agent to pause/unpause a queue from the extension using the user PIN. To pause means the agent is not answering calls.</p> <p>For information on feature access codes, see <a href="#">“Viewing feature access codes” on page 6</a>.</p>  |
| <b>Auto-pause after agent login queue</b>       | <p>Select to automatically put the agent in pause (not ready) status after the agent logs into a queue. The agent can unpause a queue to answer calls.</p> <p>For information on feature access codes, see <a href="#">“Viewing feature access codes” on page 6</a>.</p>   |
| <b>Speed Dial Setting</b>                       | Collapse and enter a phone number in the <i>Number</i> field to map a phone key with a phone number for speed dialing.   |
| <b>Follow Me</b>                                | <p>This feature allows a call to your extension to be transferred to another destination when you are not available.</p> <p>To configure follow me:</p> <ol style="list-style-type: none"> <li>1. Click <i>New</i>.</li> <li>2. Enter a <i>Name</i> for this setting.</li> <li>3. Under <i>Follow Me Numbers</i>, click <i>New</i> to enter a phone number to which the call to your extension can be transferred.</li> <li>4. Enter the phone ringing duration in seconds before the call goes to voicemail.</li> <li>5. Click <i>Create</i>, then <i>Create</i>.</li> </ol> <p>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.</p> |
| <b>Black List</b>                               | Click <i>New</i> to enter the phone number you want to block from calling your extension.  |

|                                  |   |
|----------------------------------|---|
| <b>Call Handling</b>             | <p>For more information on quick call handling, see <a href="#">“Handling calls” on page 14</a>.</p> <p><i>Effective mode</i> lists the three default schedules. After you set up quick call handling schedules, you can dial *721, *722, or *723 followed by the voicemail password to temporarily replace the original schedule with one of the three default ones. You may also modify the temporary schedule. Dial *720 to go back to the original schedule.</p>  |
| <b>Phone Profile</b>             | <p>Phone profiles contain the phone configurations that are mostly used and customized, such as the programmable phone keys. Phone profiles make extension configuration more flexible because phone users are allowed to choose the profile they want. In addition, any changes the administrator makes to a profile is automatically applied to the extensions that use the profile.</p> <p>This option is only available for FortiFone 260i and above.</p>   |
| <b>Phone profile</b>             | <p>Select a profile type if your phone type is FortiFone 260i and above:</p> <ul style="list-style-type: none"> <li>• <i>Admin defined</i>: Choose this type to select a system level phone profile which defines the phone configuration. You can only view the profile.</li> <li>• <i>User defined</i>: Choose this type to set the programmable phone keys. For details, see <a href="#">“Configuring phone profiles” on page 8</a>.</li> </ul> <p>Select a profile if your phone type is other than FortiFone 260i and above.</p> |
| <b>FortiFone Call Preference</b> | <p>If this extension is for a FortiFone, you can configure its call preferences.</p>  |
| <b>Direct call</b>               | <p>Select to add direct call function to this phone, that is, as soon as you pick up the phone, it dials the number you set automatically.</p>  |
| <b>Direct call number</b>        | <p>If you select <i>Direct call</i>, enter the number to call. For example, the number of your paging system.</p>   |
| <b>Direct call timer</b>         | <p>Enter the time in seconds to wait before the number dialing starts after the phone is picked up.</p> <p>You can enter a different number to call before the set time expires.</p>  |
| <b>Auto answer</b>               | <p>Select to enable this phone to automatically answer phone calls without being picked up.</p>   |

6. Click *Apply*.

## Handling calls

*Preferences > Preferences > Call Handling* 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.

You can manage quick call handling by dialing a code to enter into a default mode and configure the call process for that particular mode if required.

If the extension with configured call handling action is part of another FortiVoice function that also has configured call handling action (for example, a member of a ring group or used for a virtual number), then the call handling action of the other FortiVoice function overrides the extension call handling action.

### To handle a quick call

1. Go to *Preferences > Preferences > Call Handling*.
2. Click *Quick call handling*.
3. Select a call status at the top of the page.  
Each status can only be used for one call management configuration.
4. For *Call Process*, select *System default action* or *User defined action* except for the *Out of office* status.
5. If you select *System default action*, the three quick call modes are the same as listed under *Effective mode*.
6. If you select *User defined*, click *New* to define a call process according to a schedule.
  - Select a pre-configured *Schedule* for the call action. You can click *View* to display the schedule details. Schedules can be created when configuring *Voicemail Options*.
  - Add an *Action* for the call process. You can add multiple actions to process a call in sequence. For example, you can add *Play announcement* and then *Auto attendant*. In this case, an incoming call will be transferred to the auto attendant after an announcement is played.  
*Default action* is equal to the action when you select *System default action* under *Call Process*.
    - If you select *Follow me*, select a follow me profile. For information on configuring follow me, see [“Follow Me” on page 13](#).  
This option is available only if call forwarding is enabled by your administrator in the extension’s user privilege.
    - If you select *Play announcement*, select a sound file. For information on configuring sound files, see [“Customizing sound files” on page 5](#).
    - If you select *Auto attendant*, select a system auto attendant profile.
    - If you select *Forward*, enter the number to which you want to forward the call.  
This option is available only if call forwarding is enabled by your administrator in the extension’s user privilege.
  - Click *Create*.
7. Click *OK*.

## Using the operator console

If your extension is assigned the operator role by your administrator, an *Operator Console* button appears on the top of your web portal. Clicking the button opens the operator console where you can process phone calls on the Web as your organization’s phone operator.

## Managing active calls

In the *Active Calls* pane, when an active call appears, you can select the call and click the icons at the top of the pane to:

- pick up the call
- hang up the call
- transfer the call by dragging and dropping it to an extension in *Idle*, *In Use*, *Busy*, *Ringing*, or *On Hold* status in the *Directory* pane
- hold the call
- transfer the call by dragging and dropping it to the voicemail of an extension in *Idle*, *In Use*, *Busy*, *Ringing*, or *On Hold* status in the *Directory* pane

If the operator needs to make a call using the console, do one of the following:

- in the *Directory* pane, select the extension you want to call and click the *Call* icon at the top of the *Active Calls* pane.
- click the *Call* icon at the top of the *Active Calls* pane. Enter the extension to call and click *Call*.

The FortiVoice unit will first ring the callee's extension and, once the call is connected, will then ring the caller's extension.

In the *Active Calls* pane, 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.

## Checking the directory

The *Directory* pane of the console lists the extensions of your organization in various statuses. You can filter the extensions using the buttons at the top.

## Managing hotel room status

The *Room Status* pane lets you set hotel room statuses.

Once the PMS and the FortiVoice unit is properly connected and the PMS is enabled on the FortiVoice unit, all hotel room extensions appear on the FortiVoice unit.

### To batch-configure hotel room statuses

1. In the *Room Status* pane.
2. Select more than one room in the list.  
Depending on the situations of the rooms you select, the *Check in*, *Check out*, *Privilege*, *Condition code*, and *Guest status* buttons become active.
3. Click a button to batch-configure the room status and apply it to all rooms.

### To configure a single hotel room status

1. In the *Room Status* pane.
2. Select a room extension and click *Edit*.



3. Configure the following:

| <b>GUI field</b>   | <b>Description</b>   |
|--|--|
| <b>Number</b>  | The extension number of the room. You can click the number and modify it if required.  |
| <b>Guest phone</b>   | Select to bind the extension with the room and make the room a guest room.   |
| <b>Room</b>  | The hotel room number. You can click the number and modify it if required.   |
| <b>Location</b>  | Click to enter the room location.  |
| If you have selected <i>Guest phone</i> , configure the following: |  |
| <b>Checkin status</b>  | Choose the room status to configure: <i>Checked-out</i> or <i>Checked-in</i> .   |
| <b>Guest name</b>  | Enter the name of the guest for this room.<br>This option is available only if the <i>Checkin status</i> is <i>Checked-in</i> .  |
| <b>Privilege</b>   | Select phone call restriction (internal, local, or long distance) and user privilege (option 1, 2, 3) for the room. For information on setting user privileges, see <a href="#">FortiVoice Enterprise Phone System Administration Guide</a> .<br>This option is available only if the <i>Checkin status</i> is <i>Checked-in</i> . |
| <b>DND</b>   | Select if the guest of the room does not want to be disturbed.<br>This option is available only if the <i>Checkin status</i> is <i>Checked-in</i> .  |
| <b>Room condition</b>  | Select the cleaning status of the room. You can add a new code or edit the current one. For more information, see <a href="#">“To set room condition codes” on page 17</a> .   |

4. Click *OK*.

#### To set room condition codes

1. In the *Room Status* pane.
2. Click *New* for *Room condition* to add a code or select an existing code and click *Edit* to modify it.
3. Select the protocol for connecting to your PMS.
4. Enter a code number.
5. Enter the code description.
6. Click *Create*.

## Using the call center console

Depending on the call queues of which you are a member and your agent profile, you may click *Call Center Console* to work with the queues and agents of the queues.

Once in the *Call Center Console*, you can log into the queues you want and work with active calls, directory, queues, waiting callers, agents of the queues, and recent calls.

The following tables list the field name abbreviations used in two widgets of the Call Center Console:

**Table 1:** Queue Agent Summary widget

| <b><i>Abbreviation</i></b> | <b><i>Full name</i></b>   |
|----------------------------|---------------------------|
| <b>AT</b>                  | Agent Total               |
| <b>ALI</b>                 | Agent Logged In           |
| <b>AAv</b>                 | Agent Available           |
| <b>ATK</b>                 | Agent Talking             |
| <b>APS</b>                 | Agent Paused              |
| <b>AHD</b>                 | Agent Onhold              |
| <b>LTT</b>                 | Longest Talk Time         |
| <b>LCW</b>                 | Longest Call Waiting Time |
| <b>CW</b>                  | Call Waiting              |

**Table 2:** Queue Stat Today widget

| <b><i>Abbreviation</i></b> | <b><i>Full name</i></b>         |
|----------------------------|---------------------------------|
| <b>CT</b>                  | Call Total                      |
| <b>CAn</b>                 | Call Answered                   |
| <b>CAb</b>                 | Call Abandoned                  |
| <b>COF</b>                 | Call Overflowed                 |
| <b>CTr</b>                 | Call Transferred                |
| <b>CTT</b>                 | Average Talk Time               |
| <b>CWT</b>                 | Average Waiting Time            |
| <b>OB</b>                  | Outbound Call                   |
| <b>OBT</b>                 | Outbound Call Average Talk Time |

# Appendix: Using Voicemail

To use the FortiVoice voicemail, press the Voicemail or Message button on your phone and enter the voicemail PIN provided by your administrator. You can then follow the voice prompts to manage your voicemail.

Following is the FortiVoice voicemail menu structure. Numbers represent the keys on the phone.

|  |
|--|
| 1 Play voicemail message.  |
| 3 Advanced options.  |
| 1 Reply to a voicemail.  |
| 3 Listen to the date and time when the message was left and the caller's phone number. |
| 5 Leave a message in the mailbox of an extension.                                      |
| 4 Play previous message.   |
| 5 Repeat current message.  |
| 6 Play next message.   |
| 7 Delete current message.  |
| 8 Forward message to another mailbox.  |
| 1 Prepend the message.   |
| 2 Forward message without prepending.  |
| 9 Save message into a folder.  |
| 0 Save into the new message folder.  |
| 1 Save into the old message folder.  |
| 2 Save into the work message folder.   |
| 3 Save into the family message folder.   |
| 4 Save into the friends message folder.  |
| # Exit.  |
| 2 Change folders.  |
| 0 Play messages in the new message folder.   |
| 1 Play messages in the old message folder.   |
| 2 Play messages in the work message folder.  |
| 3 Play messages in the family message folder.  |
| 4 Play messages in the friends message folder.   |
| # Exit.  |

---

### 3. Advanced options.

---

5 Leave a message for an extension.

---

\* Return to the main menu.

---

0 Greeting options. (After recording a message, press 1 to accept it, 2 to listen to it, and 3 to redo the recording.)

---

1 Record your “unavailable” message.

---

2 Record your “busy” message.

---

3 Record your name.

---

4 Record your temporary greeting.

---

1 Record your temporary greeting.

---

2 Erase your temporary greeting.

---

5 Change your password.

---

\* Return to the main menu.

---

\* Repeat the current voice prompt.

---

# Exit.

---

