



## Desktop Soft Client User Guide v1.4

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## Introduction

The Horizon clients have been designed to be used in conjunction with the core Horizon service and will allow connection of a PC desktop/laptop device and/or connection of devices using the Android operating system such as tablets and mobile phones.

The clients also provide additional features via an easy to use software client:

- Soft Phone
- Instant Messaging
- Presence
- Management of your existing Horizon account

This document explains the core functionality of the desktop soft client as well as the steps required to install it. There is some core Horizon functionality referenced in this document that is not explained in detail so please refer to the Horizon User Guide for more information.



## Getting Started

### Minimum system requirements

The PC you install the softphone on must meet the minimum system specification, otherwise you may experience performance issues. The minimum specification is as follows:

- ◆ Operating system: Windows 7, Windows 8/8.1 or Windows 10 (Classic view only)
- ◆ The installation footprint is approximately 215 megabytes (MB)
- ◆ For voice calls, a sound card, speakers, and a microphone or a headset are required
- ◆ A minimum 1 GB random access memory (RAM) is required
- ◆ Minimum 1 gigahertz (GHz); however, 1.5 GHz is recommended
- ◆ Open Graphics Library (OpenGL) 1.5 or higher is recommended.

Please note: the client may work on other versions of Windows or virtual environments, but are not officially supported.

### How the client works

On Horizon, a single user account can be used for each device meaning your user account can be shared over your IP phone, your desktop client and mobile client if applicable. Your existing user account can, in theory, be used by up to 4 devices, enough for an IP phone, a desktop soft client, a mobile soft client or a tablet softphone.

In short this means that if a call is delivered to your user account, it will access all clients attached to the service, as well as your IP phone, allowing you to take the call through a device of your choice.

Likewise if you choose to adjust call settings for your user account via the client, this will then be applied, meaning it implements the change over both your IP phone and the Horizon web interface.

It is therefore key to remember that if you do not want to be contacted on the Horizon client, e.g. on your desktop, but do want your IP phone to ring, that you simply log out of the client rather than implementing Do Not Disturb (DND) for example.

Finally, where the intention is to login to a single account with multiple devices of the same type at the same time (i.e. laptop and desktop using the desktop client, or mobile phone and tablet using the mobile client) calls will be delivered randomly to any of the logged-in devices. It is recommended that you logout of each device if you intend to use multiple devices, so that only one device of each client type is logged-in at any one time.

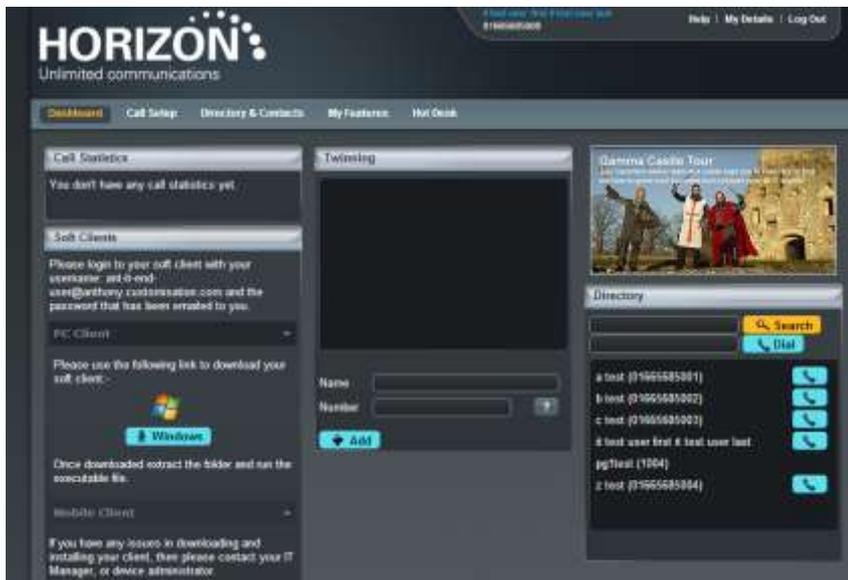
### Number Presentation

Number presentation within the Horizon clients mimics that set up in the Horizon system. As such if you generate a call from the Horizon client, it will output the number presentation assigned to your Horizon user account.

An option to hide your number for outbound calls is available within the settings.

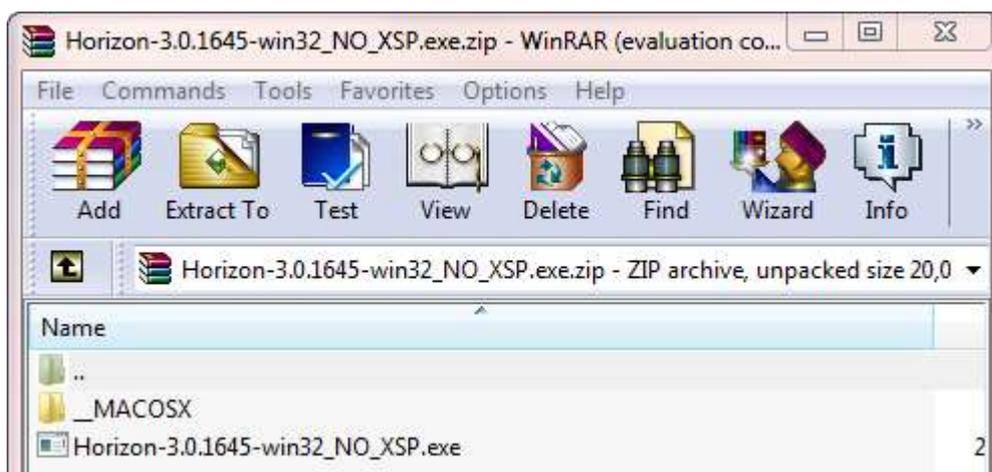
## Installing the Desktop Soft Client

The desktop soft client is allocated by the company Administrator and once you have been allocated with the client, you can download it from your portal dashboard where it will appear like this:



**Please note:** A local install will require admin rights on the relevant machine for the initial installation of an executable file (.exe). You must check with your network administrator before installing the software, to ensure you can run the .exe files.

Once you have downloaded the soft client, double click the ZIP file and extract the file in that folder. Do not click into any other folders. Then unzip the file into a memorable place (such as your desktop).



Click on the Horizon icon.



Select what language you want the installer to run through and then click OK.



On the "Welcome to the Horizon Setup" screen, click "Next>".



Review the License Agreement, and to proceed, click "I Agree".





It is recommended to use the "Normal Installation" option. Click "Next>".



Select if you want Horizon to run when the system starts or not, if you want a desktop icon and then click "Next>".



Select the Destination Folder and then click "Next>".

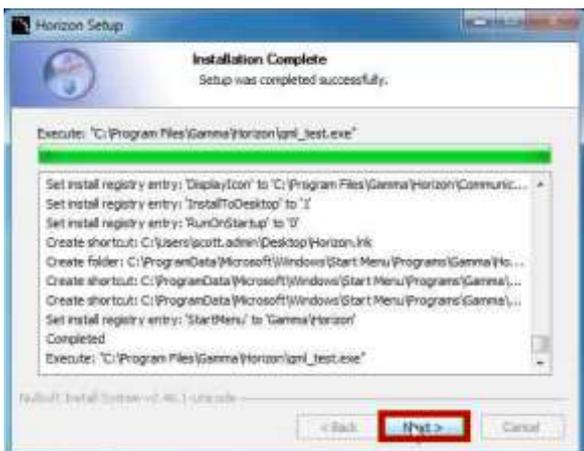




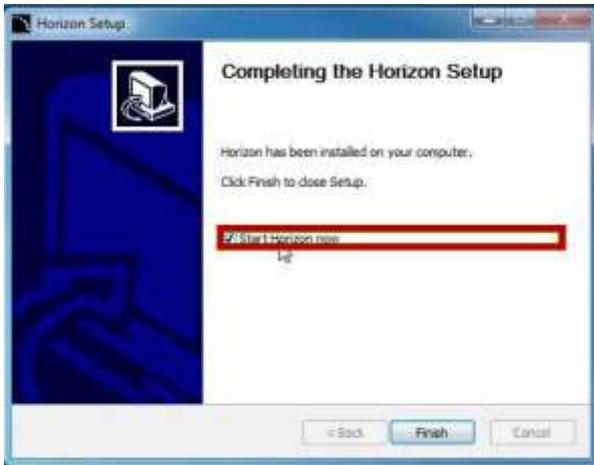
Choose a Start Menu Folder. You can either put it in an existing folder or type a new folder you want it in. Click "Install".



Wait for the installation to complete. The progress will be highlighted by the green bar. Once it has completed, click "Next>".



Select if you want to start Horizon Soft Client now or not, and then click "Finish".



Please note that Horizon portal changes will not be reflected in the soft client but changes made in the soft client will be reflected in the Horizon portal.

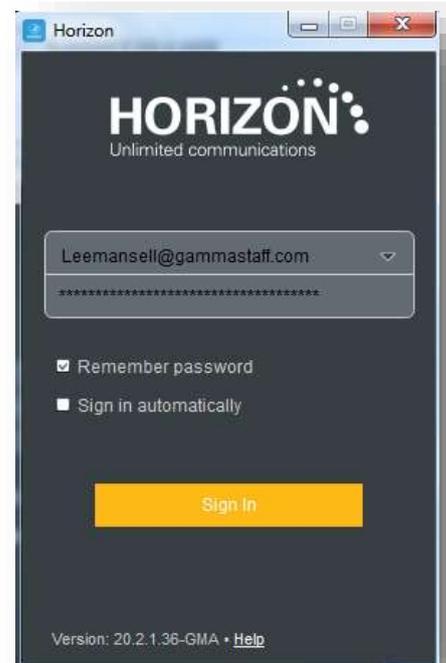
## Passwords

A single password (**that is separate to a user's Horizon portal password**) is generated per user by the system for use with ALL software clients (Integrator, Integrator CRM, desktop soft client and the mobile soft client). If a user is using more than one client (Integrator and the mobile soft client, for example) then only the assignment of the first client will result in a password being generated; this will be received before a confirmation email with download instructions. For all subsequent clients, only the confirmation email will be sent.

## Signing in

When you first sign in you will be prompted to sign in - please note these are different than the Portal login details. Please speak to your Administrator if you don't have your log in details.

If required you can request the softphone to remember the password and sign you in automatically.



## Audio input/output preferences

In order to use the desktop soft client you will need a microphone and speakers - these could be built in, or could be in the form of a USB headset. After you first install the softphone you will want to ensure these settings are correct.

To do this select the menu item (on the bottom right) and select preferences. Select audio at the top, then ensure the output device and input device match are set to your desired choice.



## The Basics

The main sections of the soft client can be seen down the left hand side and along the bottom of the main screen.

Each of the functions is described below;

	<b>My Information</b> – View and update your information, for example, your presence, avatar, and location.
	<b>Contacts</b> – View your contacts.
	<b>Communications History</b> – View previous chats and calls.
	<b>Full Enterprise Directory</b> – Show all contacts of the directory.
	<b>Dial Pad</b> – Make calls, it is integrated with the main window.
	<b>Chat</b> – Start an instant message conversation with a selected contact.
	<b>Call</b> – Make an IP audio call to a selected contact.
	<b>Call from Phone</b> – Make a Click-To-Dial call from your desk phone (or secondary device).
	<b>Menu</b> – Open Call Settings, Preferences, and Help.
	<b>Call settings menu</b> – Use for quick access to call settings such as call forwarding.
	<b>Add</b> – Add a contact, group, or conference.



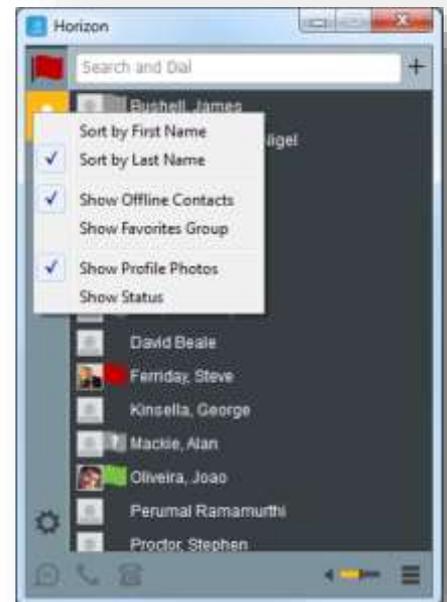


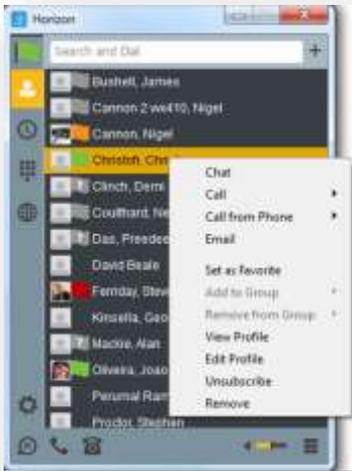
## Contacts

When you start the soft client for the first time, your Contacts list will be empty. The easiest way to add a contact is to click on the directory icon, right click the user you would like to add and select 'Add contact'. They will be sent a request to share presence with you, and once it's accepted you can see each other's presence and instant message each other.



Right clicking on the contacts icon allows a user to arrange the order





## Making a call

To make a call to one of your contacts you can either;

- Right click and select if you would like to call from your softphone or desk phone
- Or highlight the relevant contact and click the icon depending on the type of call you would like to make (as detailed in 'Basics').

## In-call Menu

Once the call has started the in-call menu will appear at the top of the window. From here you can:

- ◆ Hang Up
- ◆ Mute
- ◆ Hold
- ◆ Transfer
- ◆ Conference
- ◆ Call Park



## Drag and Drop Conference

Right clicking on an active call brings up further options (pictured right)

Furthermore, an active call can be dragged and dropped onto a 2nd call to create a conference.



## Initiate a chat

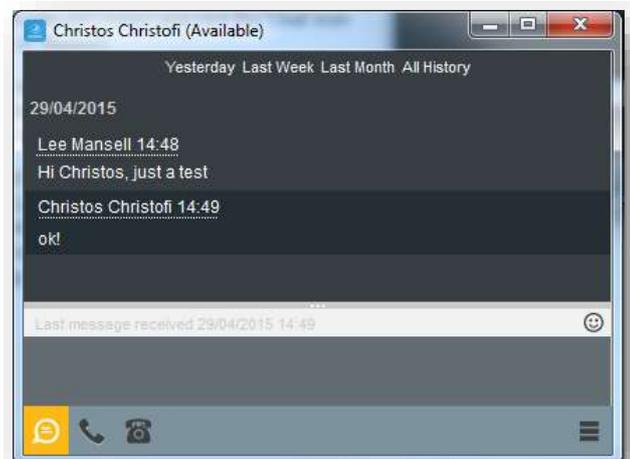
To initiate a chat with one of your contacts, you can either;

- Right click and click 'Chat'
- Or highlight the relevant contact and click the 'Chat' icon (as detailed in 'Basics')

If you would like to initiate a call to your contact, you can do so by clicking one of the call icons from the bottom of the chat window.

At the top of the message area, there are four links: Yesterday, Last week, Last month, and All history. From these links, you can load history from your local storage and different time frames. You can delete the history using the drop-down menu.

You can send instant messages to up to four different contacts in a conference:



## Features

### Communication History

The communication history section will show all of your incoming, outgoing and missed calls, as well as your chats. You can initiate calls or chats from this page by selecting the appropriate icon from the bottom of the softphone or right clicking and selecting the relevant option.

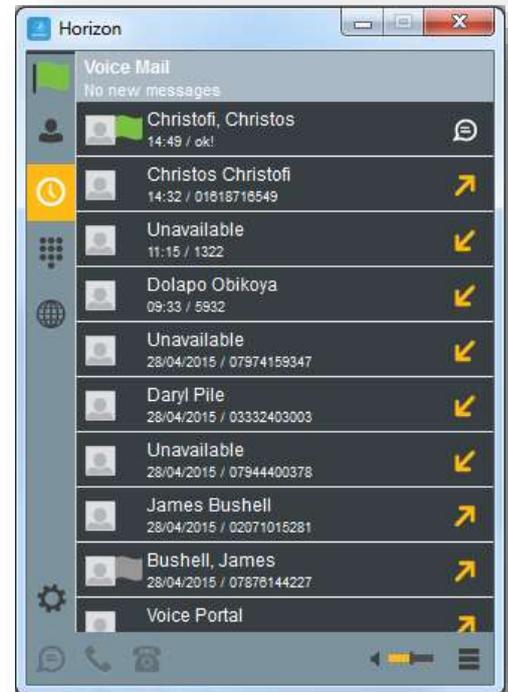
### Voicemail

You can also see if you have any voicemails within this section. If you do, the Voice Mail section at the top will tell you how many. You can call your voicemail box by clicking here.

### Directory

The directory tab will load all users in your company directory. You can use the white bar along the top to search/filter your results. After you locate the relevant person from the directory, you can add them as a contact, initiate a chat or make a call from your softphone/desk phone.

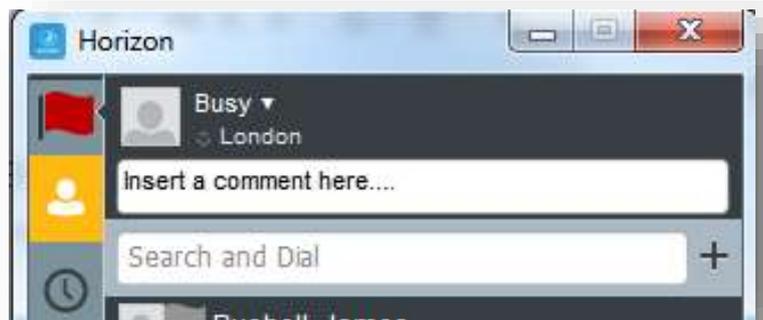
These options are available by right clicking on the mouse.



## Dial Pad

Clicking the dial pad will present the dial pad in a new window to the right. You can input a number by either clicking the numbers with your mouse or entering them with your keyboard. You can then select whether the call is made from your softphone or your desk phone.

Clicking the handset before entering a number will enter the previously dialled number



## My Information

Clicking on the flag will allow you to update your own information. Areas to be edited include;

- Status - by clicking the V next to your current status
- Location - by clicking set location
- Profile picture - by right clicking the image section. You can either clear your current picture or add a new one

## Settings and Configuration

The section contains many options that allow you to customise your desktop soft client and the following covers the most common settings.

### Options menu

The options menu can be located on the bottom right of the softphone, as shown to the right. You can carry out the following;

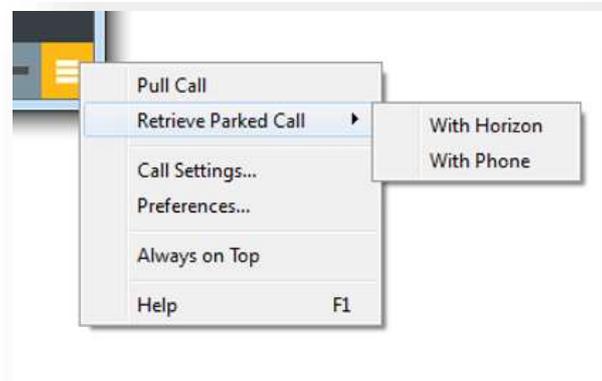
- Pull/retrieve call
- Call settings (for full definitions of features please see the Horizon user guide)
  - Twinning
  - Remote office
  - Forward calls (always/busy/unanswered)
  - Do not disturb
  - Withhold my number
  - Preferences



### Pull/retrieve call

These options allow you to;

- Pull call - this is where a user can over a live call from another device, i.e. their desk phone
- Retrieve call. User would dial the location then # to retrieve the call.



## Twinning

Twinning allows you to specify one or more numbers that will ring any time you receive an incoming call to your Horizon extension. You can activate these individually, or all at once, as required.

## Remote office

Direct calls coming into a user's Horizon number to a remote specific phone. You can also maintain the number being used for remote office.

## Forward calls (always/busy/no answer)

Here you can enable/disable any call diverts for the three scenarios detailed and maintain the divert numbers as required.

## Do not disturb

Do not disturb will stop calls arriving at your phone. This allows you to enable/disable this feature as required.

## Withhold my number

Withhold my number will prevent people receiving a call from seeing a user's DDI. This allows you to enable/disable this feature as required.



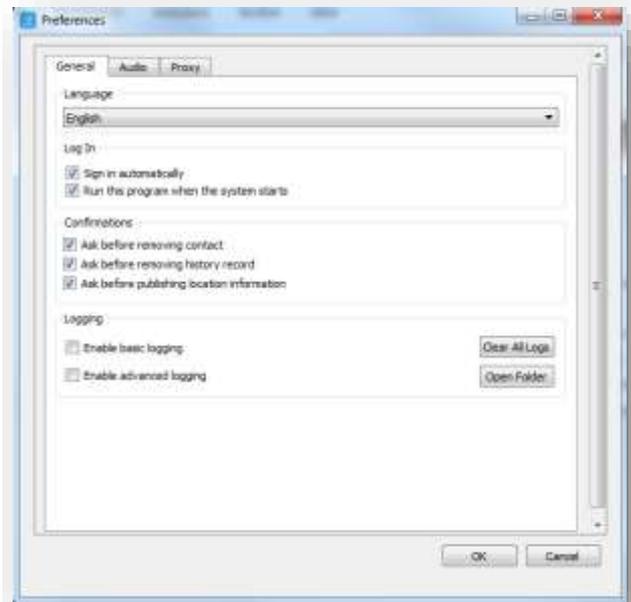


## Preferences

Preferences allows you to define some characteristics of the softphone, such as whether it starts automatically when Windows does. Some of the other common fields are;

- ◆ Confirmation - specify whether you'd like to be prompted for confirmation when removing data
- ◆ Sign in automatically - whether you'd like the softphone to sign you in as soon as it starts
- ◆ Run the programme when the system starts - if you'd like the softphone to start when Windows starts
- ◆ Audio > Output/Input - specify the devices you'd like to use as your speakers and microphone

Please note that presence of monitored parties is only available where the client is logged in.





## Service limitations

The following service limitations should be carefully considered when using the Horizon soft clients.

### 3G and 4G networks

We cannot guarantee any aspect of setting up and conducting a Horizon call over any mobile network, whether using a Horizon mobile client or a desktop client on a tethered laptop. Mobile networks provide no prioritisation of signalling and voice payload packets and some networks will either block or slow down VoIP packets.

Before you report a call quality or availability issue on a desktop or mobile client, please ensure you have checked that a mobile network is not being used to connect to the platform, as we are unable to provide support for such incidents.

Using the clients over 3/4G will consume data that may either result in charges being raised by your mobile operator or be counted against your monthly data allowance. The amount of data transferred during a call will be dependent on codec used.

### Wi-Fi Networks

We cannot guarantee the call quality when Horizon calls are made over Wi-Fi, owing to limitations of Wi-Fi as a transport mechanism for VoIP packets. We also expect the quality of Wi-Fi connections to vary (office Wi-Fi, home Wi-Fi and public Wi-Fi hotspots) and consequently you need to consider how Horizon is used over Wi-Fi and your expectations must be set accordingly.