

Horizon Soft Phone Client PC Guide

About

The Horizon Soft Phone and Collaborate client has been designed to be used with the Horizon service allowing you to make and receive calls (Soft Phone) on your computer, and take advantage of additional services such as Chat, Presence, Audio Conference, Video Calls and Video Conferencing (Collaborate).

A user can have either the Soft Phone only service or Collaborate. They can however still use a desk phone and a mobile client and use the desktop client. Calls will be delivered to all devices that are logged into the Horizon platform.

There are certain settings that can also be controlled in the client, and this guide will explain that. Please be aware that there are some Horizon features that are mentioned in this document that are not explained in detail. For full detail on Horizon features not mentioned here, please contact your Company Administrator.

Getting Started

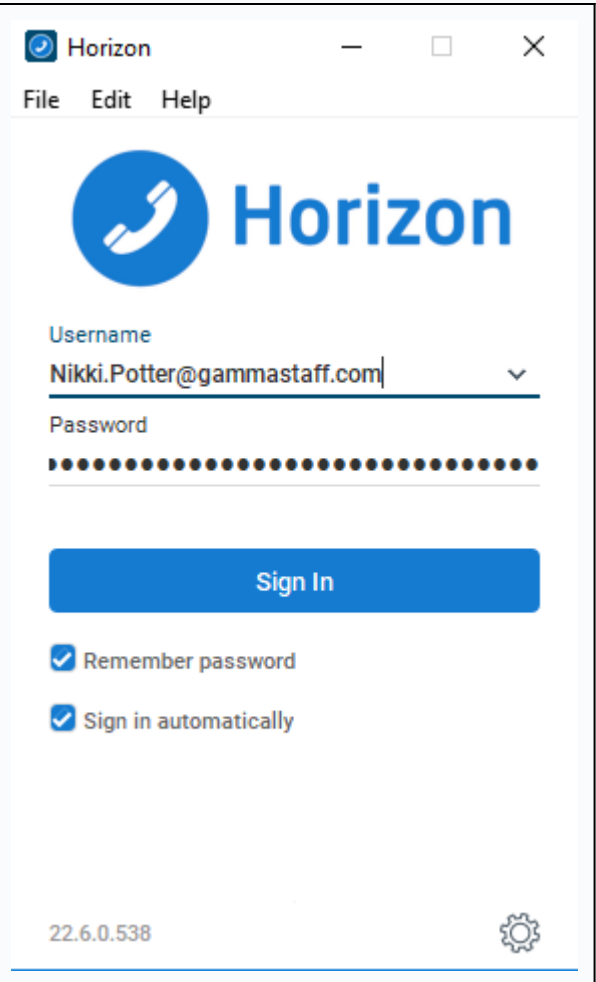
Minimum system requirements

- Windows 7 SP1, Windows 8/8.1 or Windows 10 (Classical 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 4GB random access memory (RAM) is required.
- Minimum 1.5 gigahertz CPU (GHz)
- 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.

Signing in and Your Password

To sign in, you need your Horizon username and your client password. These will be emailed out to you separately by your Company Administrator. Enter your username and password, and before you click sign in, you can select the “Remember password” tick box so that you don’t need to remember your client password. You can also tick the “Sign in automatically” tick box so that Horizon automatically logs in when you log into your PC - providing it is connected to an internet connection.



I've forgot my password

If you have forgotten your password, you can go to the below link with your Horizon Username and your email address. Enter these details and a new client password will be emailed to you.

<https://www.unlimitedhorizon.co.uk/webapp/resetClientPassword?lang=en>

If these details don't match what is on the Horizon system, you will need to contact your Company Administrator.

Please be aware that this will log you out of all clients that you are logged into, including Horizon Mobile clients, Integrator, Receptionist, Connect.

The client is saying my password is incorrect

On the rare occasion that you have reset your password and it still doesn't work, we recommend that you complete the “Forgotten password” steps one more time before contacting your Company Administrator.

Headsets & Audio Devices

In order to use the Horizon Soft Phone client, you will need a microphone and speaker. This could be built into your computer, or a headset. We'd recommend that once you first start your client, you make sure that you get your audio settings correct in order to make and receive calls through your

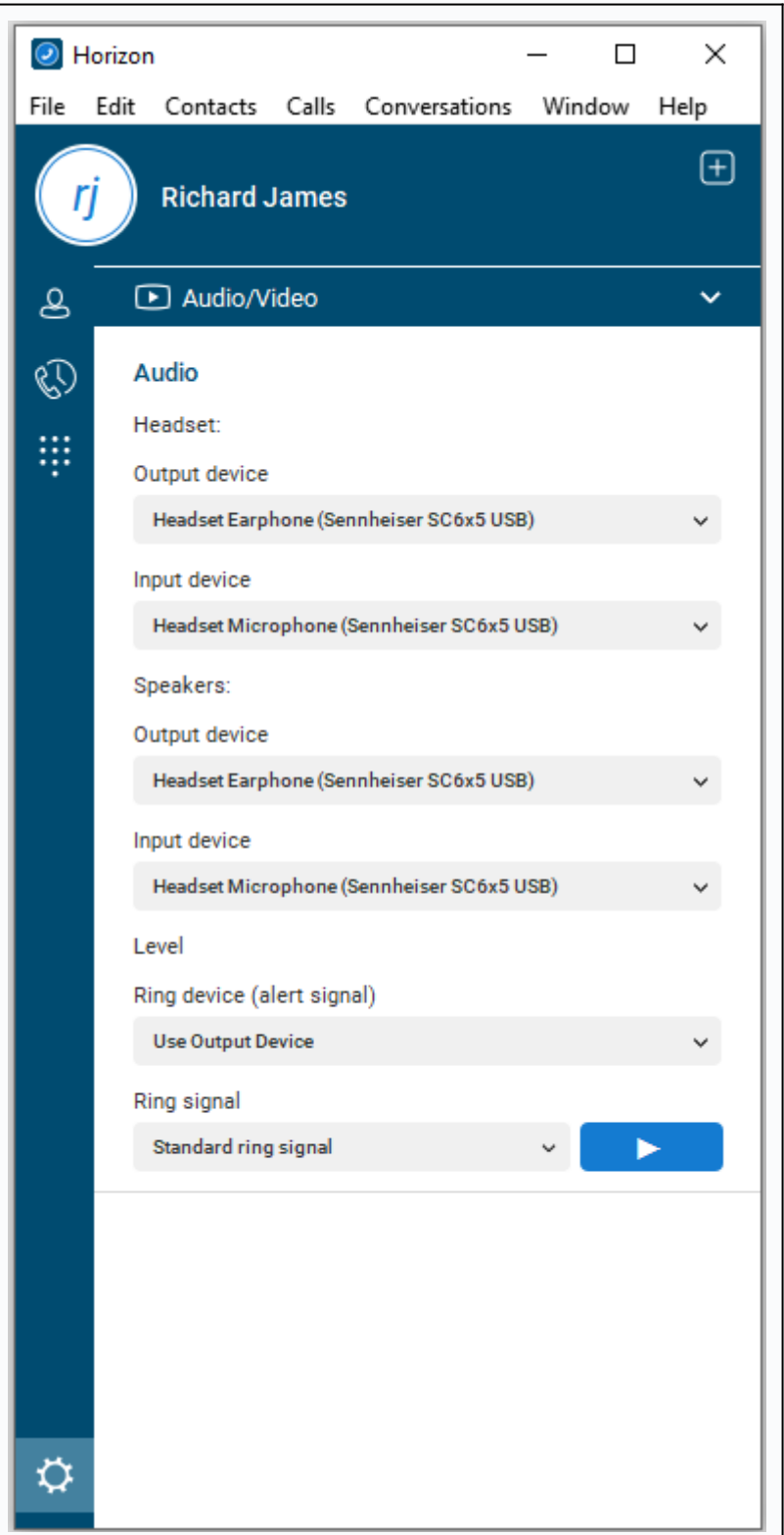
preferred audio device.

If you are using a device other than your computers built in speakers and microphone, please make sure that you follow that devices installation instructions first.

To change the Horizon settings to your preferred device you should go to your Settings which is the cog icon in the bottom left hand corner of your client, and then select "Audio / Video" from the drop down at the top of the client.

The panel is split into three sections: Headset, Speakers and Level.

- Headset Output Device - this should be the speaker you wish to use or calls.
- Headset Input Device - this should be the microphone you wish to use for calls
- Speakers Output Device - this is for your computer speakers. You can change this to a headset if you want all sounds to go through your headset.
- Speakers Input Device - this is for your computer microphone and not for calls. You can change this to a headset if you wish all recordings to go through this microphone.
- Level - Ring Device (alert signal) - This is the speaker that you want to ring when you receive a call
- Level - Ring Signal - your ringtone



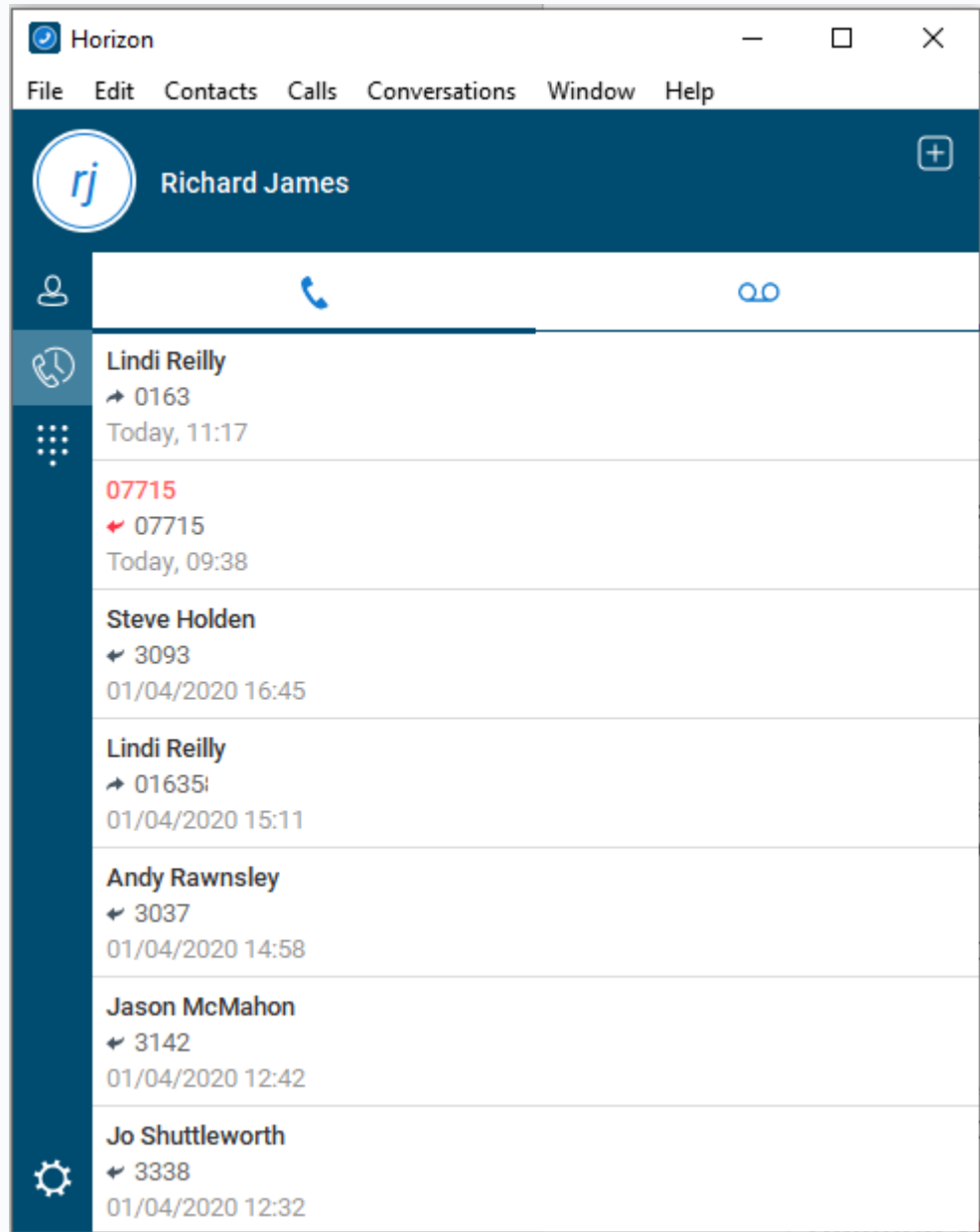
Making a Call

Call History

Once you've logged in, the first screen you'll see is your Call History. This is all calls made and receive from your Horizon account, so will include calls made and received by any desk phone or other Horizon client. This will also show calls received into any call groups that you may be in.

An arrow pointing to the left signifies an incoming call, and an arrow pointing to the right signifies a call you've made. If you have missed a call, the number and arrow will show red. Black is a connected call.

You can double click on any of these entries to call someone back.



Missed Calls

If you have received a call that you've not answered, this will show as a "Missed Call". You will have a red circle with a number in it which tells you how many missed calls you've had in the Call History banner. When you are already on the call history page there will also be a red circle icon next to the phone icon at the top of the client.

The screenshot shows the Horizon software interface. At the top, there is a menu bar with options: File, Edit, Contacts, Calls, Conversations, Window, and Help. Below the menu bar, the user's profile is displayed as "Richard James" with a circular avatar containing the initials "rj". To the right of the profile is a plus sign icon. Below the profile, there is a navigation bar with a person icon, a phone icon with a red circle containing the number "1", and a search icon. The main area displays a list of missed calls:

- Emma Green**
← 3470
Today, 11:30
- Lindi Reilly**
→ 01635
Today, 11:17
- 07715**
← 07715
Today, 09:38
- Steve Holden**
← 3093
01/04/2020 16:45
- Lindi Reilly**
→ 01635
01/04/2020 15:11
- Andy Rawnsley**
← 3037
01/04/2020 14:58
- Jason McMahon**
← 3142
01/04/2020 12:42

Directory & Contacts

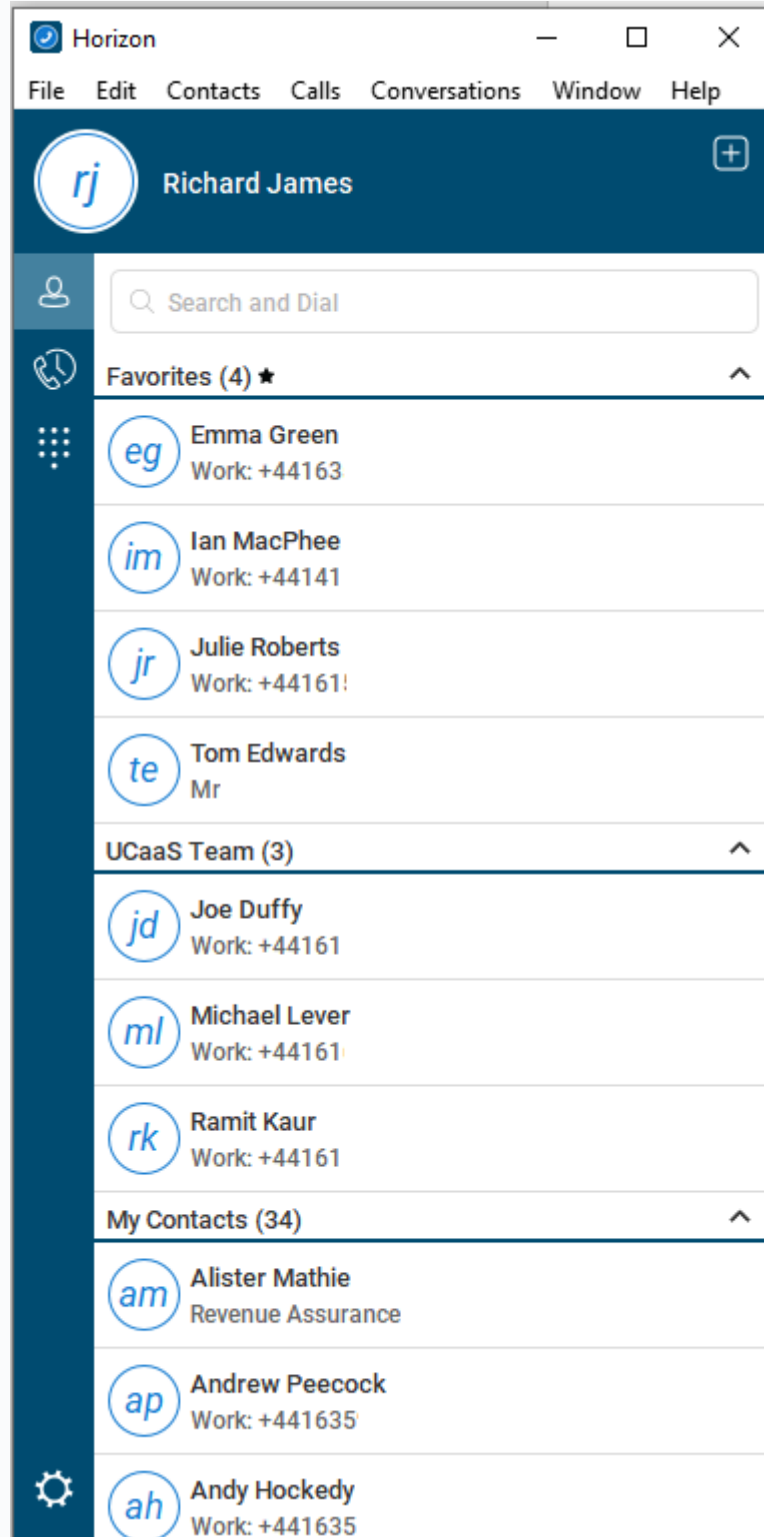
The contacts tab allows you to search throughout the company directories available to you, and also create a list of contacts that you frequently contact, making it easier for you to get in contact with the people you need to.

The “Search and Dial” bar at the top allows you to type in a name, number or extension number, which will then search all available Horizon directories and Outlook.

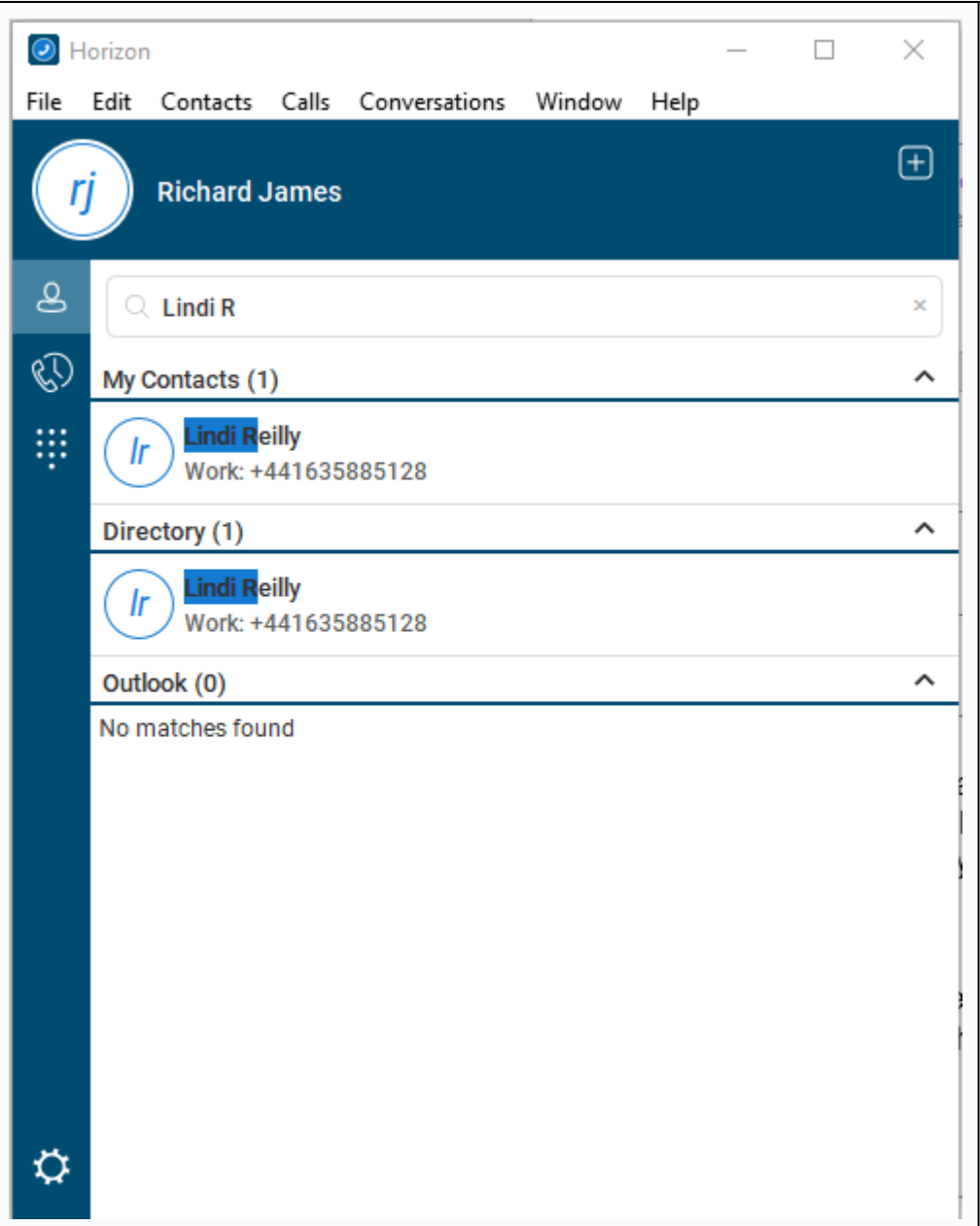
In the example here, you can see that there are Favourites, and then there is a group called “UCaaS Team”, then “My Contacts” below that.

Favourites will always be at the top, and these are entries you’ve added from your Contacts to be at the top of your contact list.

The “UCaaS Team” is a group that has been created by the user within the client itself. “My Contacts” are all the contacts that a user has added to their contacts list. The below instructions will show you how to manage and edit these options, as well as making calls to these entries.

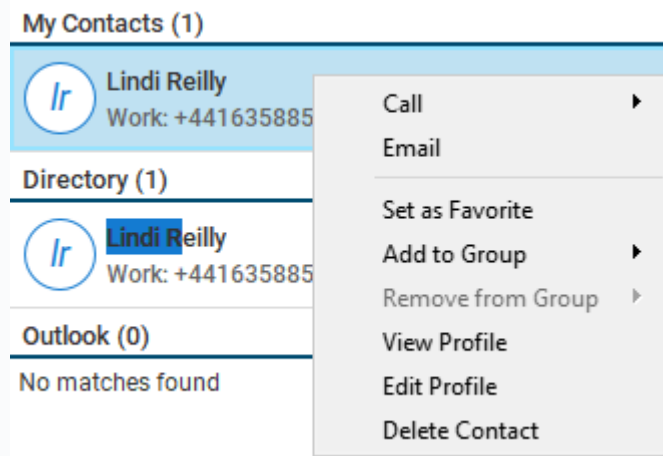


Using the search bar at the top, you can search your entire Horizon Company, any contacts that your Company Administrator has set up in the corporate directory, such as suppliers, any contacts that you've added yourself or, if you have given the client permission to, any contacts that you have set up in Outlook. Type in the contact you wish to search for, and Horizon will search all these directories in one go. Double clicking a contact result will start a call.



You can also right click on a contact which will display a list of actions that are available to you. These include:

- Calling the contact
- Emailing the contact (if an email address is assigned to the contact - this will load up your default email application)
- Set a contact as a favourite (see below for more details)
- Add contact to a group (see below for more details)
- View / Edit profile
- Delete contact

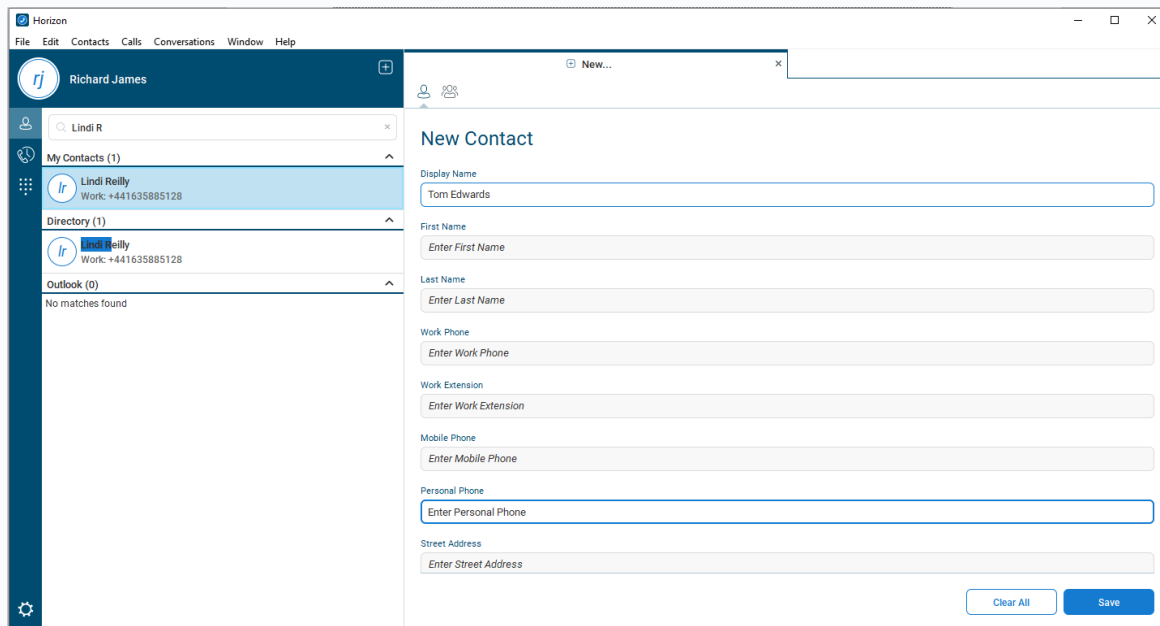


Adding a new contact

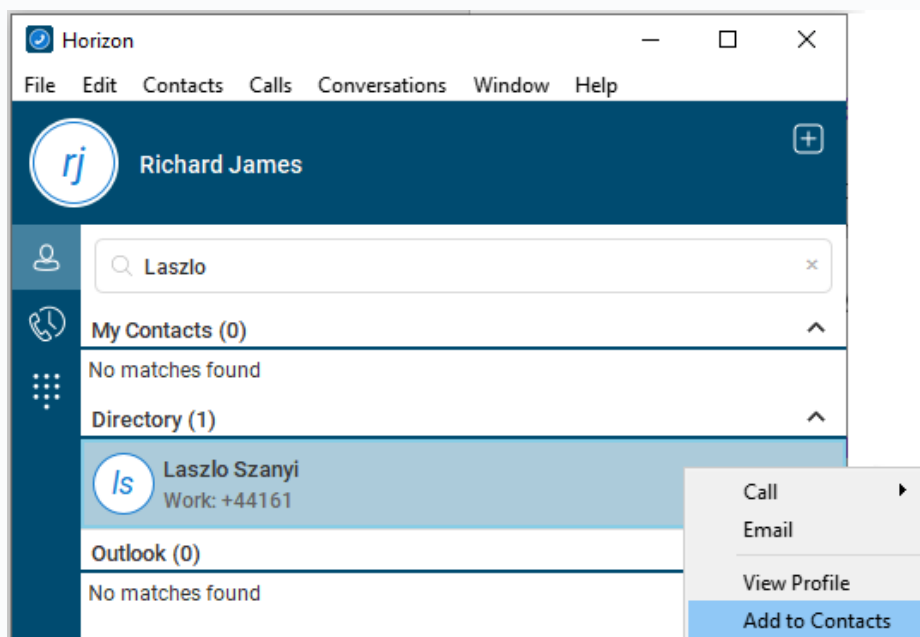
If you want a new Directory entry adding so all users can have access to this, contact your Company Administrator and request that they add an entry to the Corporate Directory.

If you want to add a contact to your account that is available on your all your devices and clients, you will need to log into your Horizon Portal and add your directory entries there. Full details on how you can do this are available in the Horizon Features guide.

You can add new contacts to your Horizon client only by clicking on the “+” icon in the top right of the application. Once you’ve done this, complete the Display Name and Personal Phone details. All other fields are disabled, and you cannot add any details in them.



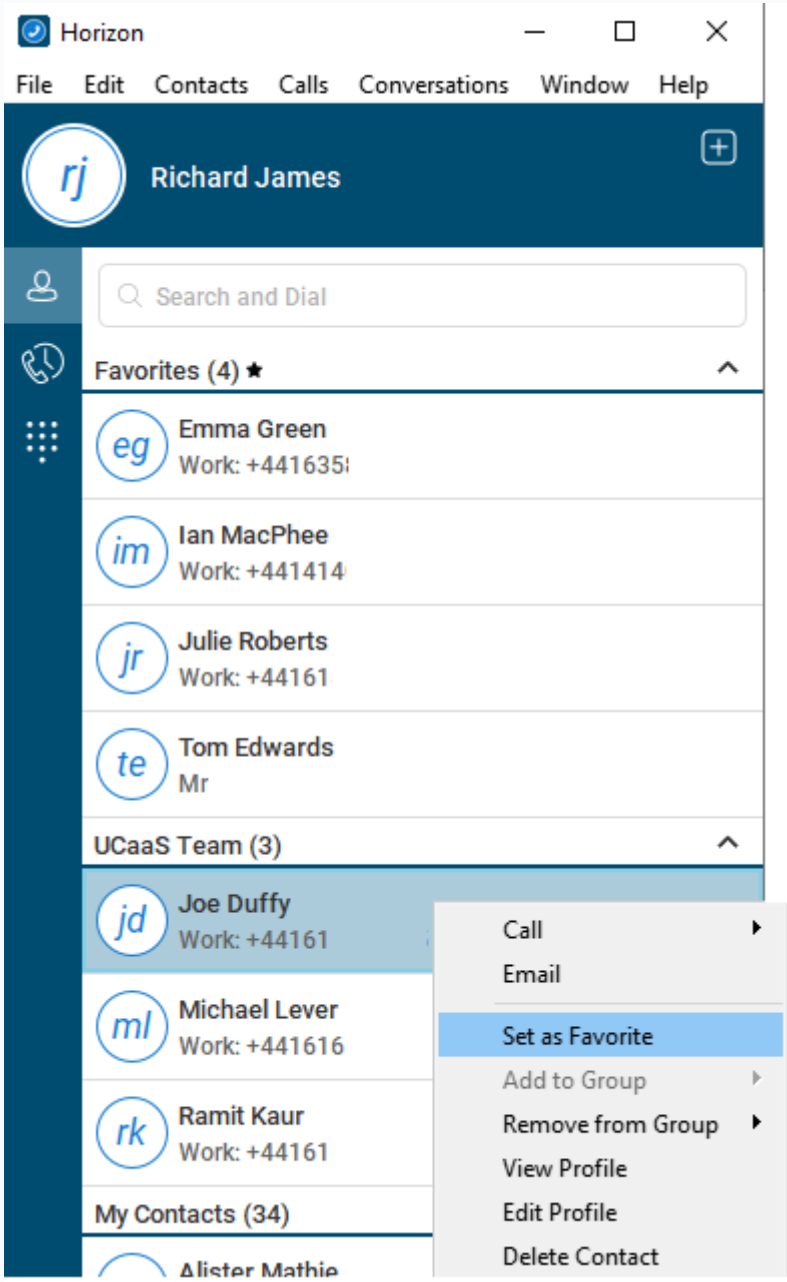
You can also add contacts from the any of the Horizon directories available to your Company by searching for a contact, right clicking on them and selecting “Add Contact”. This will save this contact in the Contacts Tab for easy access.



Contact Groups & Favourites

Favourites

To add a contact to your Favourites, you simply need to right click on a contact and select "Set as Favourite".

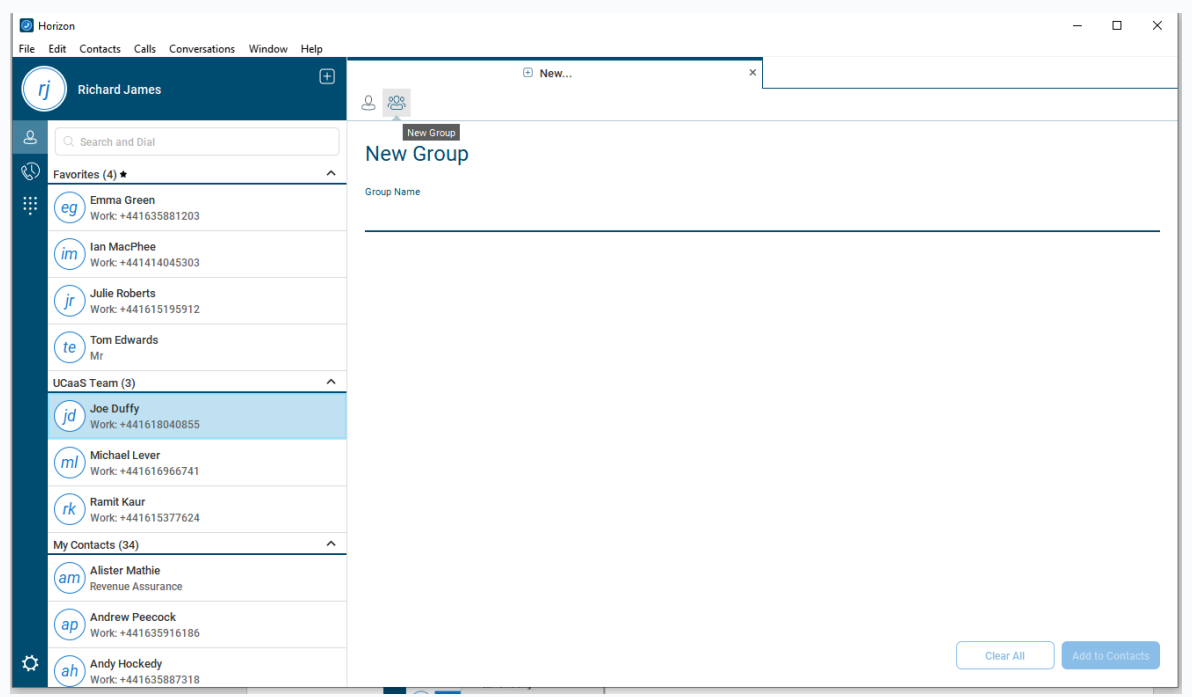


The screenshot shows the Horizon application window with a contact list. The contact 'Joe Duffy' is selected, and a context menu is open over it. The menu options are: Call, Email, Set as Favorite (highlighted), Add to Group, Remove from Group, View Profile, Edit Profile, and Delete Contact. The contact list includes: Richard James (profile), Search and Dial, Favorites (4) with contacts Emma Green, Ian MacPhee, Julie Roberts, and Tom Edwards; UCaaS Team (3) with contacts Joe Duffy, Michael Lever, and Ramit Kaur; and My Contacts (34) with contact Alistair Mathie.

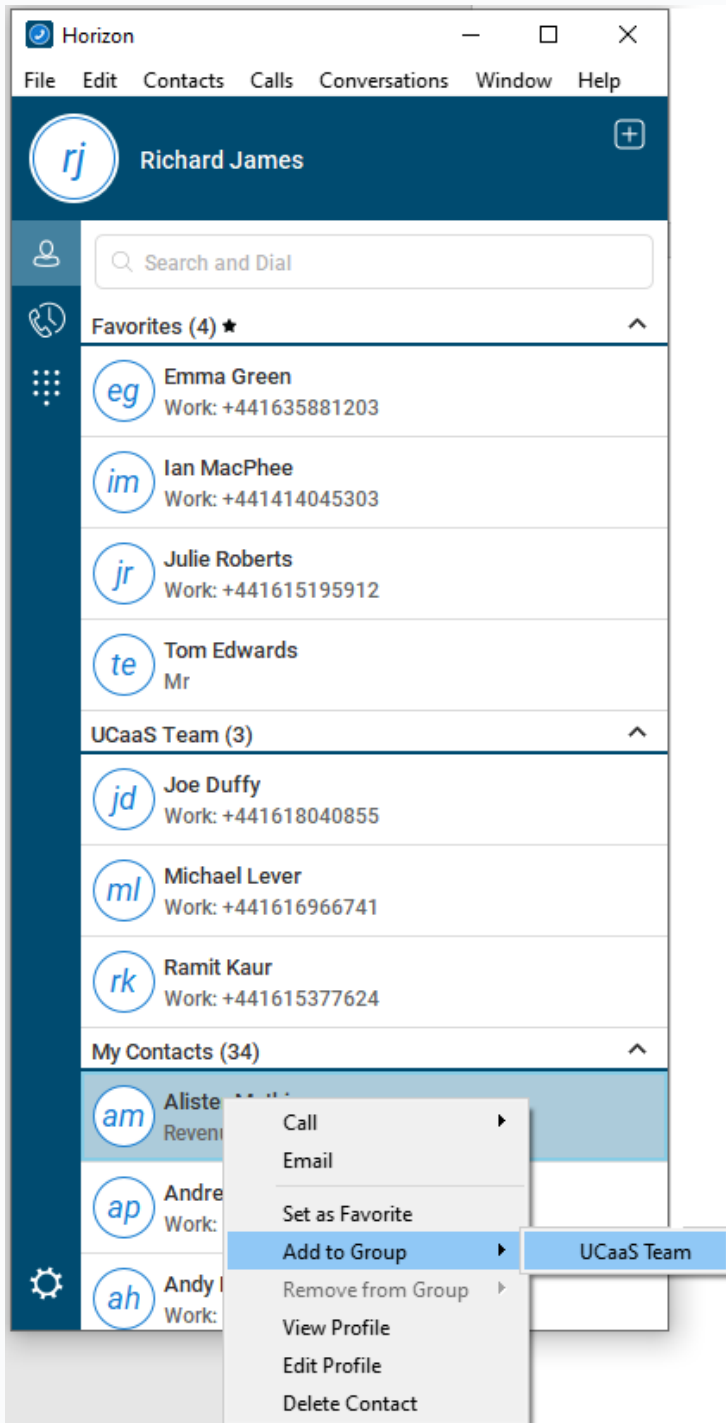
Contact Groups

Contact Groups are a useful tool to organise contacts into an order of your choosing.

Select the “+” icon in the top right-hand corner of the application and then select the “New Group” icon”. Enter a new Group Name and then click “Add to Contacts”.



Once you have added your new group, you can then order your contacts by right clicking on contact, "Add to Group" and select the group that you want that contact to be added into. To remove a contact from a group, you simply right click the contact and select "Remove from Group" and select the group to remove the contact from. When you remove a contact from a group, they will remain in the "My Contacts" section until you remove the contact.

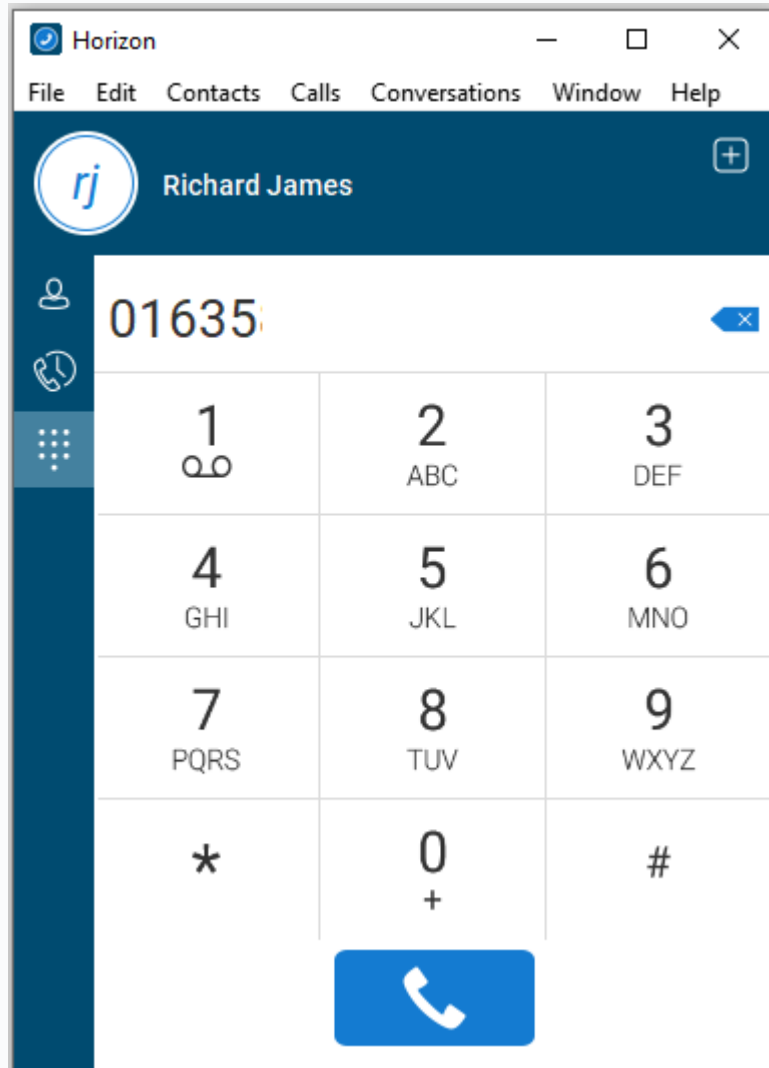


Dialpad

The dialpad allows you to enter a telephone number to be called, much like using your mobile phone or desk phone. You can use numbers on your keyboard or use your mouse to point and click at the numbers on screen.

If you've made a mistake, you can press the backspace icon on the application or on your keyboard.

If you have desk phone or Connect also associated with your Horizon account, then you will see two phone icons, whereas if you are a client only user you will only see the one icon.









This icon is what you would select to make a call from your Horizon Soft Phone Client.

This icon is what you would select to make a call from your desk phone or Connect number. Selecting this icon will generate a call to your physical device, and when you answer that call, the number you've entered in the client will immediately be dialed and ringing.

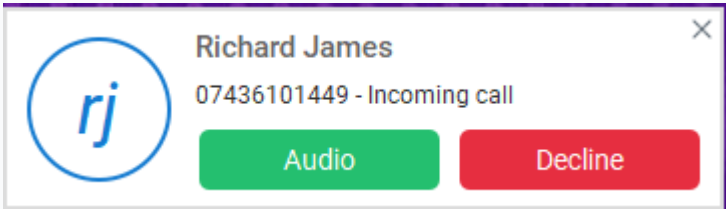
In Call Management

When you are in the middle of a telephone call, Horizon has in call management features that can help you control a call. These are:

Hang Up		To end the current call that you are on.
Hold		To place the current call on hold. If your Company Administrator has configured Music on Hold, the party you have placed on hold will hear hold music, otherwise it will be silence.

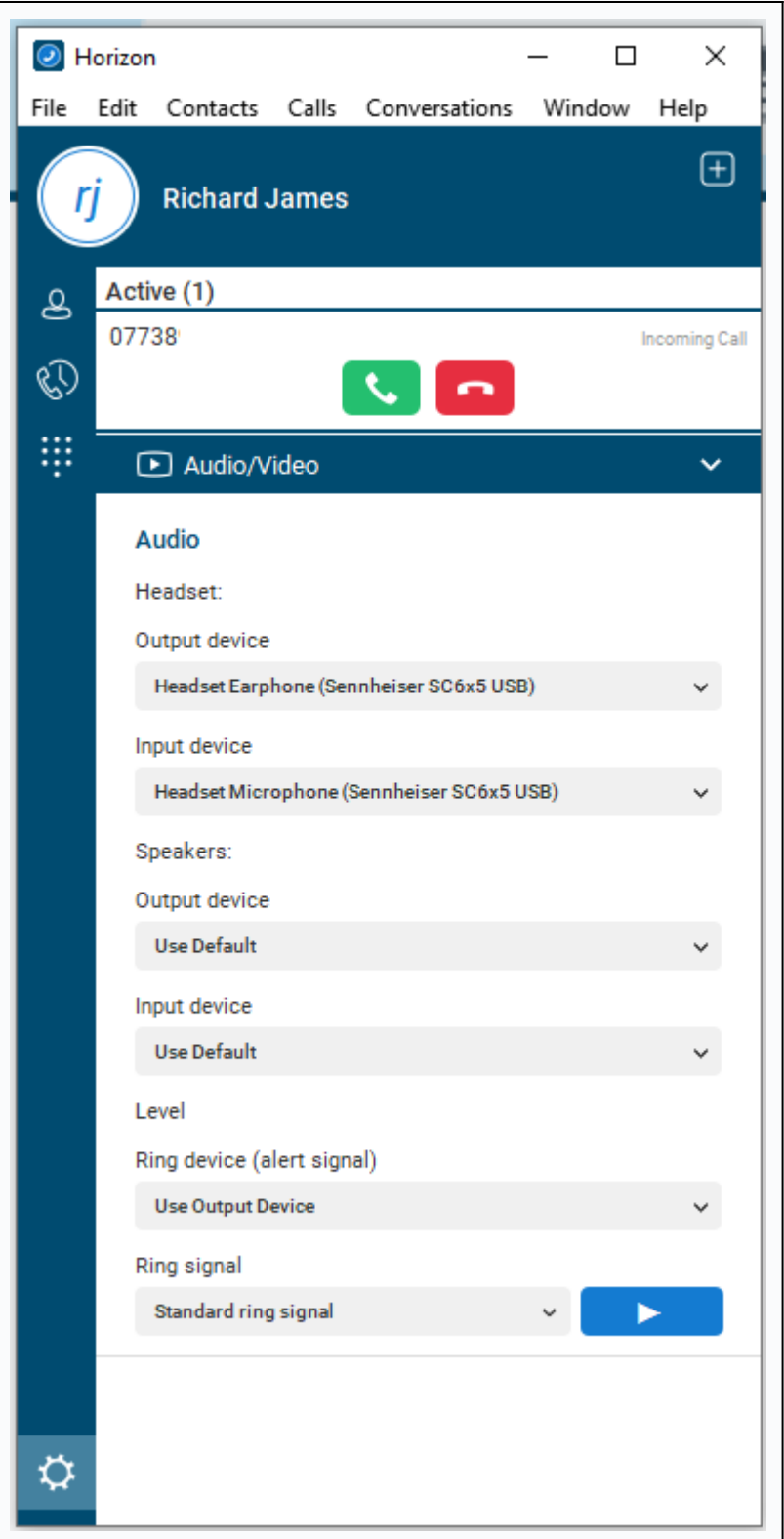
Mute		You can mute your microphone whilst still hearing what is being said on the call with the other parties. This can be particular useful when in a loud environment, however remember to unmute yourself to be heard!
Transfer		You can transfer the call to another telephone number or Horizon extension number.
Conference		This allows you to perform a conference call of up to 4 other people. Selecting this option allows you to create your conference.
Park (Call Park)		The Call Park service allows you to place a call on hold for an extended period, giving you access to other features & calls as well as making the call available to other users who are notified. For more information on Call Park Groups, please contact your Company Administrator.
Merge Calls (3 Way Calling)		If you are on a call with someone and you need someone else to join, you can place your current call on hold, call the other party, and then merge the calls together into a 3 way call.
Call Pull		If you have answered a call on another one of your Horizon devices and you want to move the call over to your Horizon client, you can do this by going to "Calls" in the menu and then selecting "Pull Call". Alternatively you can press "Ctrl+P" on your keyboard when the client is open to bring the call over from your other Horizon device to your PC client.
Retrieved Parked Call		If you want to retrieve a call that you've parked, you can do this by going to "Calls" in the menu and then selecting "Retrieve Parked Call". Alternatively, you can press "Ctrl+Alt+Shift+P" on your keyboard when the client is open.

Receiving a call

<p>Even if your Horizon client is minimised, it will always alert you to a call if you are logged in. When you receive a call, you will see a notification above the clock on your Windows machine, like the following. Clicking the green "Audio" button accepts the call as an audio call. "Decline" sends the call to whatever busy treatment your Company Administrator has set up for you. This could be sending the call to your voicemail, another telephone number or to end the call and the calling party will hear three beeps and then the call ends.</p>	
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If your client is open, you will still see the notification above your Windows clock like above and you will also see the call appearing in your client, like this.

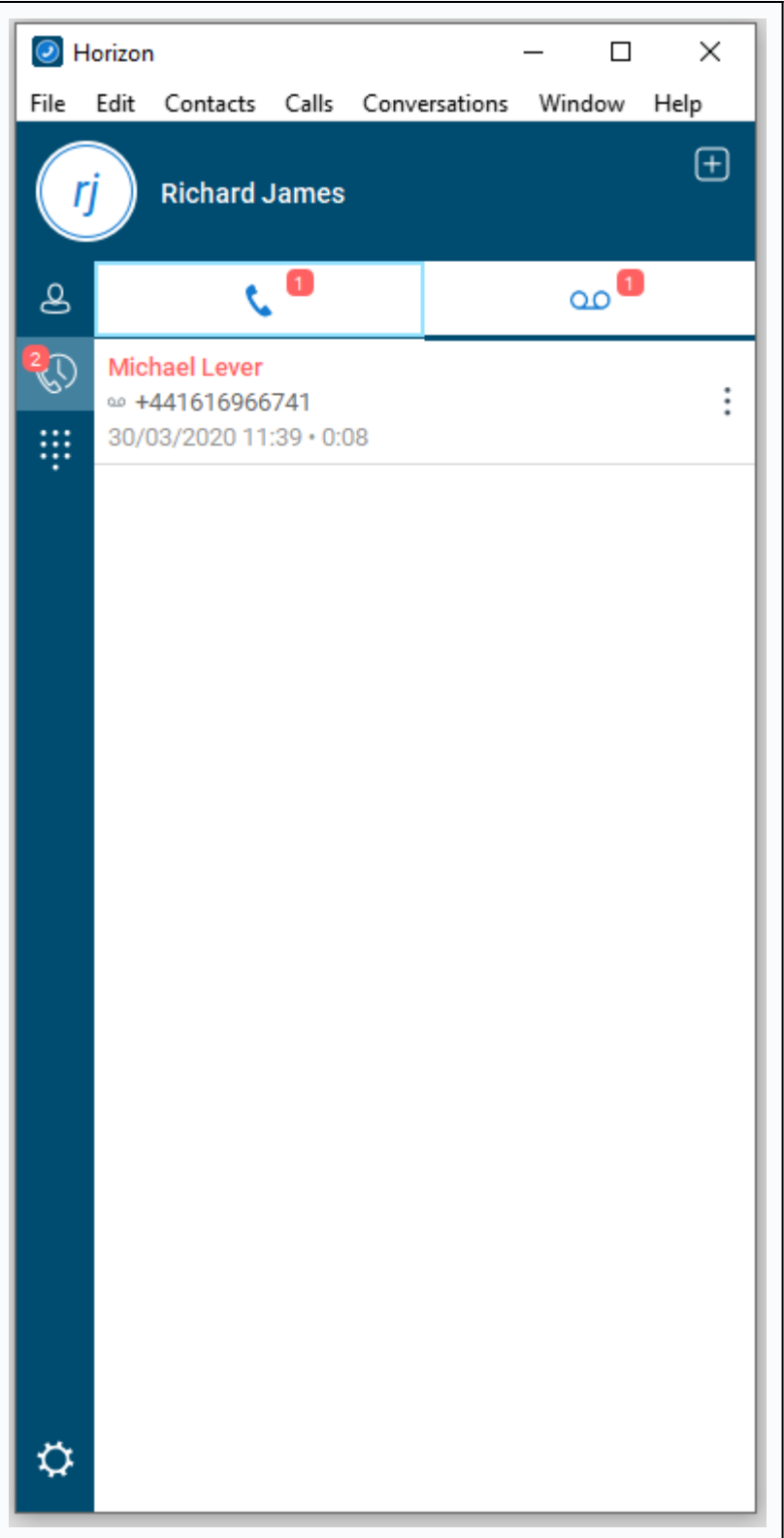
Clicking the green “answer” button accepts the call as an audio call. The red “hang up” button sends the call to whatever busy treatment your Company Administrator has set up for you. This could be sending the call to your voicemail, another telephone number or to end the call and the calling party will hear three beeps and then the call ends.



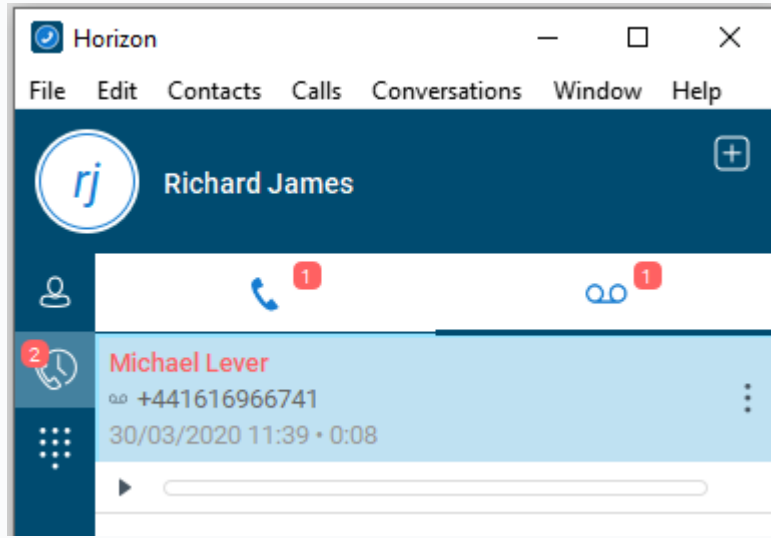
Voicemail

The Horizon Soft Phone client includes Visual Voicemail as a standard feature. This means that you can see all your voicemails without having to dial a telephone number to get access to them. Further to this, you can manage your voicemails by clicking your mouse, such as playing, deleting, marking as new etc.

To view your voicemails, you should go to your Call History and then select the voicemail tab. If you have new voicemails, a red icon will appear on your call history and on the voicemail icon, like shown in this screenshot. You may notice that the Call History red icon has a "2" in here, even though there is only one voicemail. This is because it is showing that there is a missed call as well so adds these figures together.



To listen to a voicemail, click on the voicemail you'd like to listen to and click on the play icon that appears underneath this.



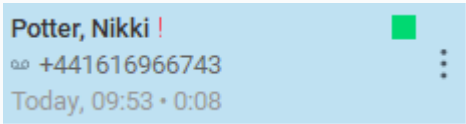
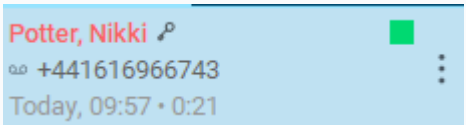
Voicemail Management

Clicking on the three dots that for a corresponding voicemail will give you numerous management options. These are:

Play	This will play the selected voicemail through the speaker that you've selected to use in your Horizon client settings.
Mark as New / Read	If it is a brand-new voicemail, you can mark this as "read" so that the icon disappears. If it is a voicemail that you've already listened to and want to keep it as unread, you can mark it as "New" which will highlight the voicemail in red again.
Save As	You can download the voicemail and save this as a audio file (.wav) on your PC.
Delete	You can delete your voicemail
Call	Call back the person who left you the voicemail, unless it was left by a withheld number.
Copy Phone Number	You can copy the phone number to your computers clipboard, so this can be pasted into any document or field in any application on your PC.
View Profile	You can view the callers profile if they are in the directory.
Edit Profile	You can edit the caller's profile, though this is only for your PC and is not shared with other users within the same Horizon Company.

Voicemail Sensitivity Tags

When a caller leaves a voicemail, they can press certain keys at the end of the message to add "sensitivity tag", which then highlights to you when viewing your voicemail in the client. For a caller to get access to these tags, they need to press "#" at the end of the message and follow the prompts.

Urgent		An “Urgent” voicemail will show a red exclamation mark next to it.
Confidential		A “Confidential” voicemail will show a key icon next to it.

If you are set up to receive emails as well when you receive a voicemail, then these tags will show on your emails as well. For “Urgent” tags, the email will be marked with high importance. For “Confidential” tags, it will be marked as “Private”

Logging in / out Call Centre or Call Queue Groups

The PC Client can be used with Call Queue Groups and Call Centre on Horizon (the corresponding agent bolt ons are required for each). The queues menu can be accessed from “Settings” and then “Services”. Once selected the following options are available for an agent:

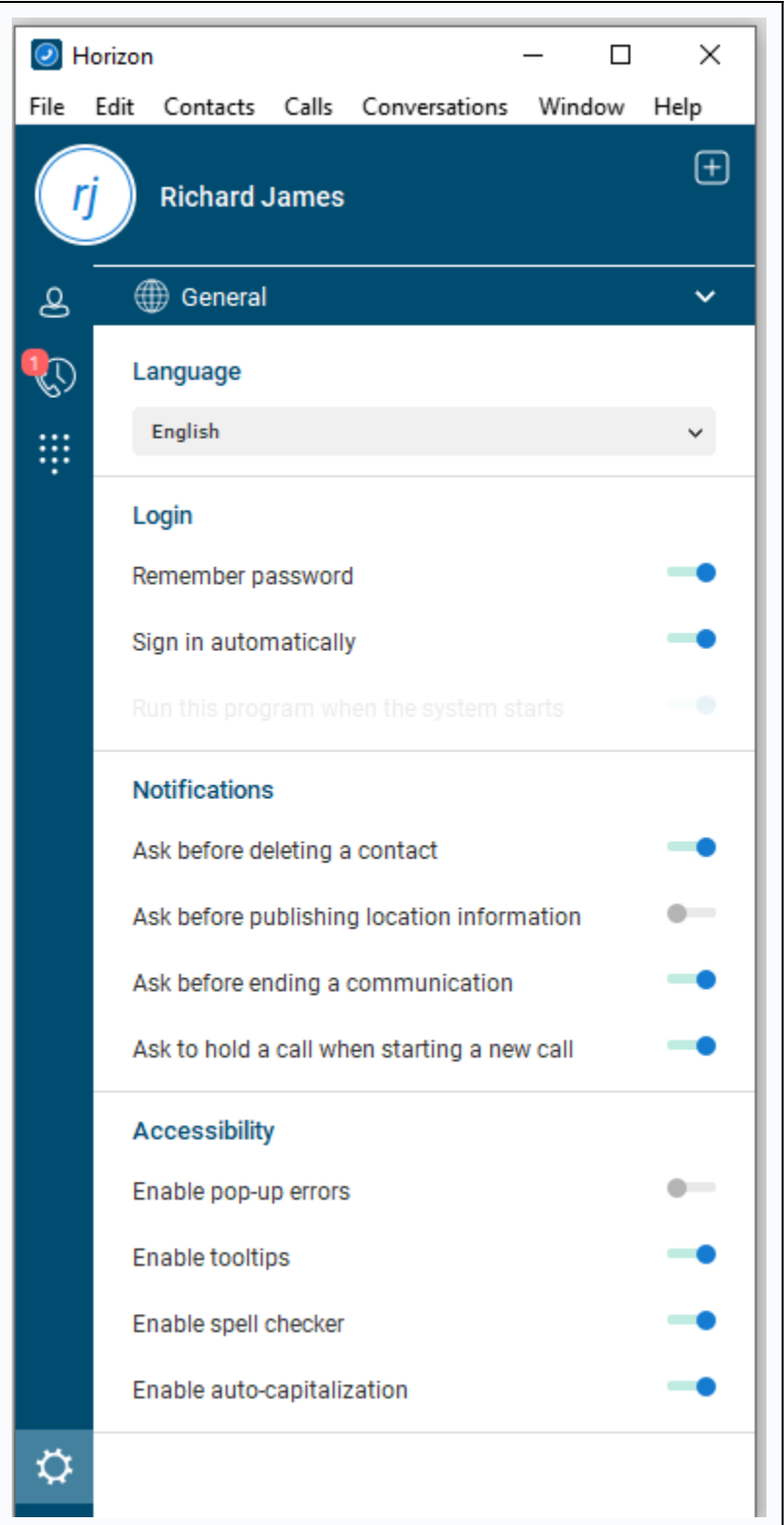
- Sign in - sign into a particular Call Centre group or Call Queue Group. This is only available if the Company Administrator has allowed an agent to log in and out of queues.
- Sign out - sign out of a particular Call Centre group or Call Queue Group. This is only available if the Company Administrator has allowed an agent to log in and out of queues.
- Agent statuses
 - Available - calls will be routed to available agents, depending on the settings defined by the Company Administrator
 - Wrap Up - Calls will not be routed to the agent for a defined period of time set by the Company Administrator. Once this time has expired, the agent will automatically change to Available.
 - Unavailable - Calls will not be routed to an agent. A Company Administrator may have set up numerous unavailable codes, so the agent has to define the reason for change.

Settings

Client Notifications

There are several notifications that are available within the Horizon Soft Phone client. These settings are available under the “General” tab when in the settings menu.

- Ask before deleting a contact - this is to make sure that you don’t delete a contact in error. This is defaulted to “enabled”.
- Ask before publishing location information - this is not applicable in the Horizon Soft Phone Client - this is a Horizon Collaborate feature.
- Ask before ending a communication - this is not applicable in the Horizon Soft Phone Client - this is a Horizon Collaborate feature.
- Ask to hold a call when starting a new call - If you are in an active call, the client will check that you want to start a new call and place the current call on hold. This is defaulted to “enabled”.



Login Settings

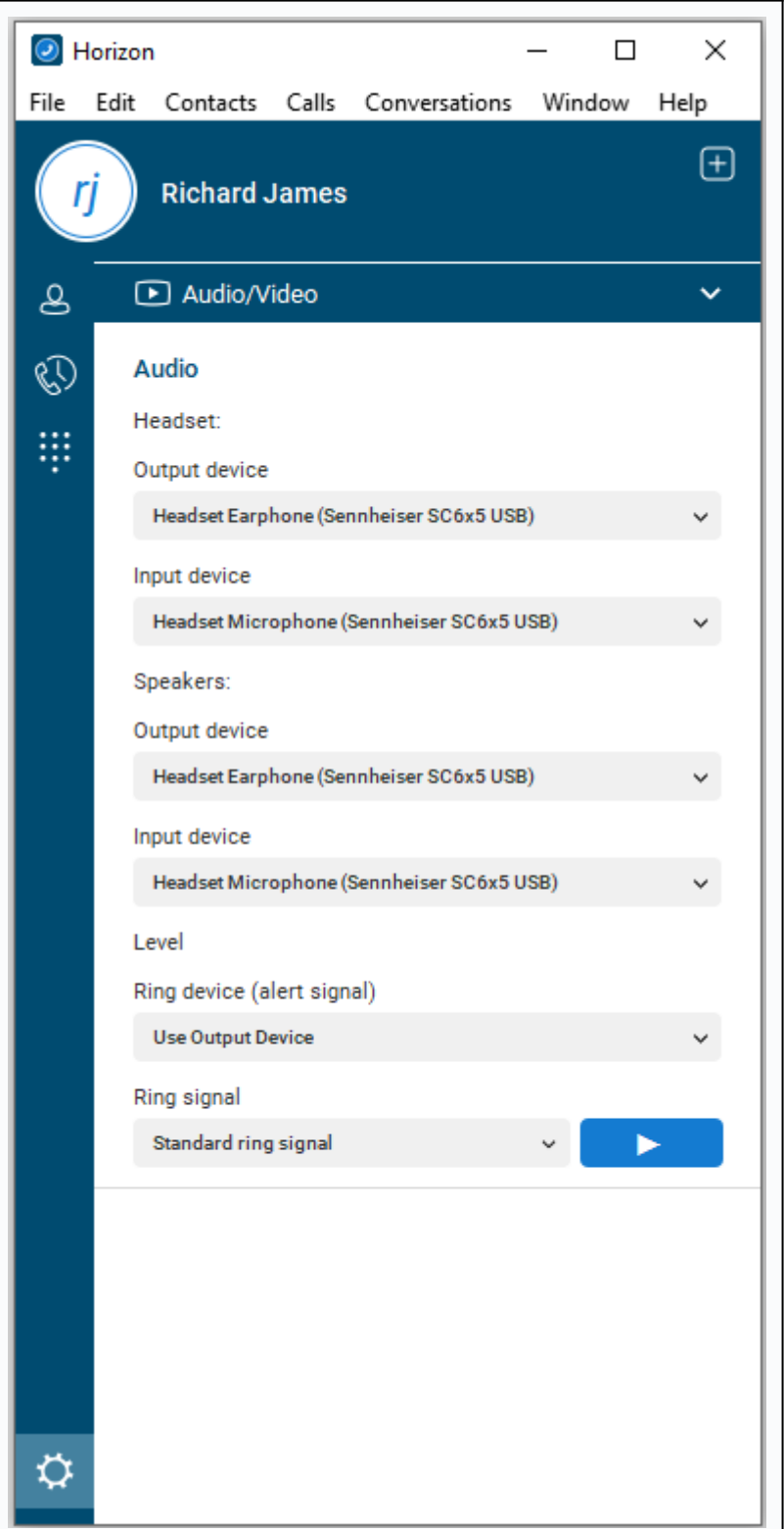
If you have forgotten to set the client to remember your password, or if you need to change your automatically when windows starts setting, you can do this when you’re logged in by going to “Settings” and “General”, and toggling the relevant setting.

Headsets and Audio settings

If you want to change your headset or audio settings, please see the Headsets and Audio settings section at the top of this document.

Ringtones

There are 10 different ring tones that you can select within the Horizon Soft Phone client, or you can select to have no ringtone. To change the ringtone, you should go to Settings and then select the "Audio/Video" setting and then change the "Ring Signal" option.



Incoming Calls

Your incoming call settings are available under the Settings tab and then selecting “Incoming Calls” from the down drop.

Do Not Disturb	<p>Do Not Disturb (DND) allows you to turn off call notifications to all your Horizon devices and clients whilst enabled.</p> <p>When you have enabled this setting, all calls will be sent to whatever call treatment you have set up for “Call Busy”. To confirm what this is, you should speak to your Company Administrator.</p>
Anonymous Call Rejection	<p>Any calls made by someone who is withholding their number will be blocked from reaching you. You will not receive any notification that a call has been attempted.</p>
Call Forwarding	<p>You can set your calls to forward to another telephone number, depending on which setting you have activated. The options are:</p> <ul style="list-style-type: none">• Always - calls will always be forwarded to another telephone number that you have defined.• When Busy - this will send calls to another number if you are on a call and are unable to answer the phone.• When No Answer - this will send calls to another number after a defined number of rings• When Not Reachable - this will send calls to another number if you are not logged into any Horizon client and don't have a handset assigned to you.
Remote Office	<p>Remote Office allows you to use their home phone, mobile phone or even a hotel phone as their business phone. Using the click to dial functionality from Horizon Portal a user can make phone calls from this remote phone and have them billed to the Horizon Company. This service also directs all calls coming to your business phone to ring the remote office phone.</p> <p>When the service is active, incoming calls to the user are redirected to their remote phone number and are subject to the user's terminating services.</p>
Call Waiting	<p>Call Waiting allows you to receive multiple calls at the same time. If you are on a call and you receive another call, it will display on your screen, and you'll also hear a beeping noise in the headset or speaker. You can receive up to 3 external calls.</p>
Twinning	<p>Twinning allows you to ring up to 5 other numbers at the same time when you receive a call. This could be a home office or another mobile phone. If numbers have been set up already by your Company Administrator, these will appear in the list here.</p>

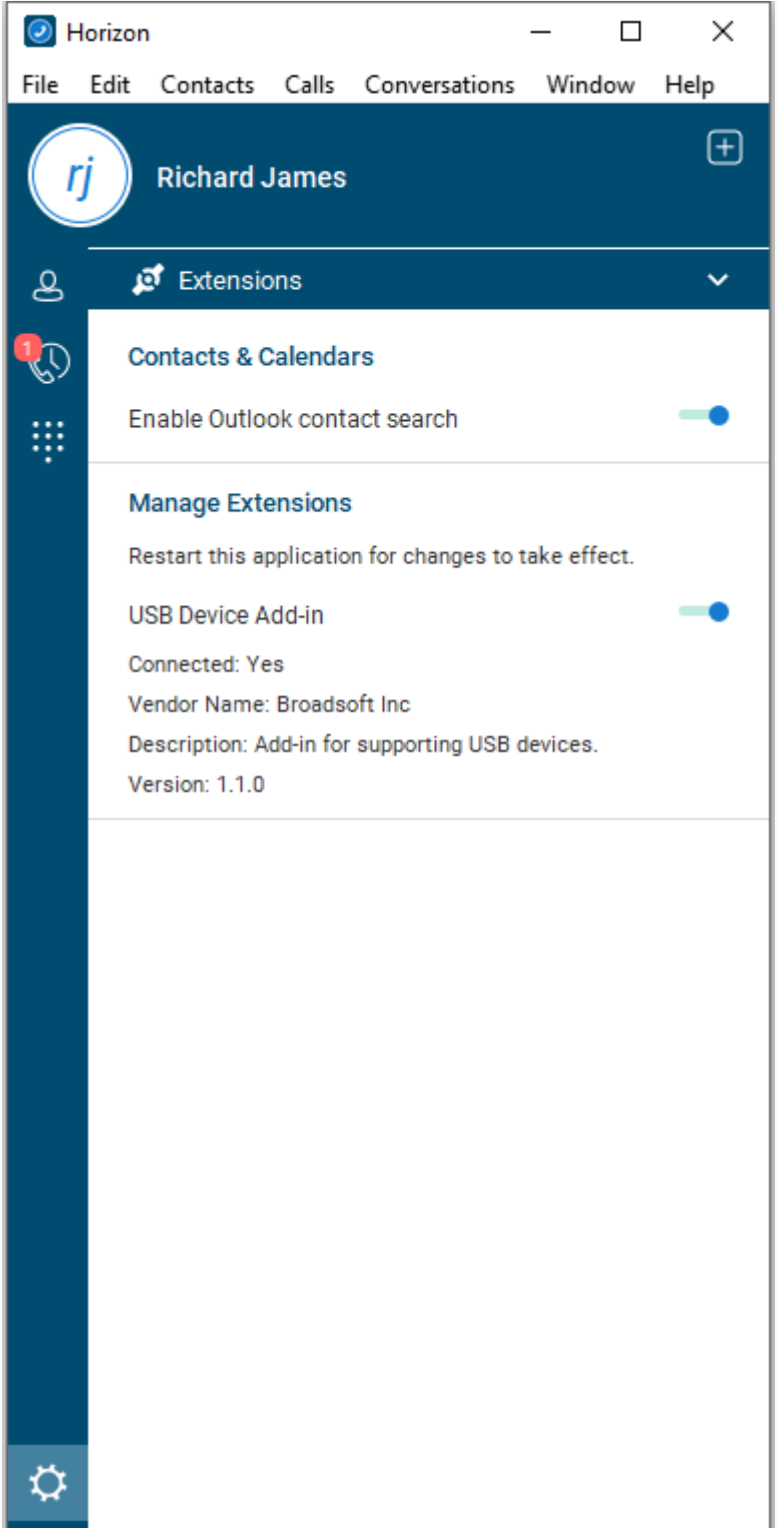
Outgoing Calls

Your incoming call settings are available under the Settings tab and then selecting “Outgoing Calls” from the down drop.

Block My Caller ID	<p>If you want to withhold your telephone number when making an outgoing call, you can enable this setting.</p>
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Highlight to Call	If this setting is enabled, you can set a hotkey (default is “Ctrl+Shift+C”), then you can highlight a telephone number in an application or a website and press the hotkey, which will generate an outgoing call to the telephone number highlighted.
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Outlook Integration

<p>You can search through your Outlook contacts in your Horizon client. To do this, or to change this setting, you should go to Settings and then select “Extensions”.</p>	 <p>The screenshot shows the Horizon client interface. The window title is "Horizon". The menu bar includes "File", "Edit", "Contacts", "Calls", "Conversations", "Window", and "Help". The user profile is "Richard James". The "Extensions" dropdown is open, showing "Contacts & Calendars" with a toggle for "Enable Outlook contact search" turned on. Below that is the "Manage Extensions" section for "USB Device Add-in", which is connected and has a version of 1.1.0.</p>
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Contacts Order

You can change how contacts are ordered. If you select "Contacts", you then have the option to "Sort by First Name" or "Sort by Last Name".

