



Mac Soft Client User Guide v1.0

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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 either a PC desktop/laptop device and/or connection of devices using the iOS (Apple) and 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 Mac 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 Mac 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 (OS): Mac OS 10.10 Yosemite, Mac OS 10.11 El Capitan, Mac OS 10.12 Sierra
- HDD: The installation footprint is approximately 125 megabytes (MB), for voice calls, a sound card, speakers, and a microphone or a headset are required
- RAM: Minimum 4GB is required
- CPU: A minimum 1.5 GHz CPU is recommended
- For voice calls, a sound card, speakers, and a microphone or a headset are required

Please note: the client may work on other versions of Mac 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 Mac 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 Mac 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 Mac using the Mac 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.

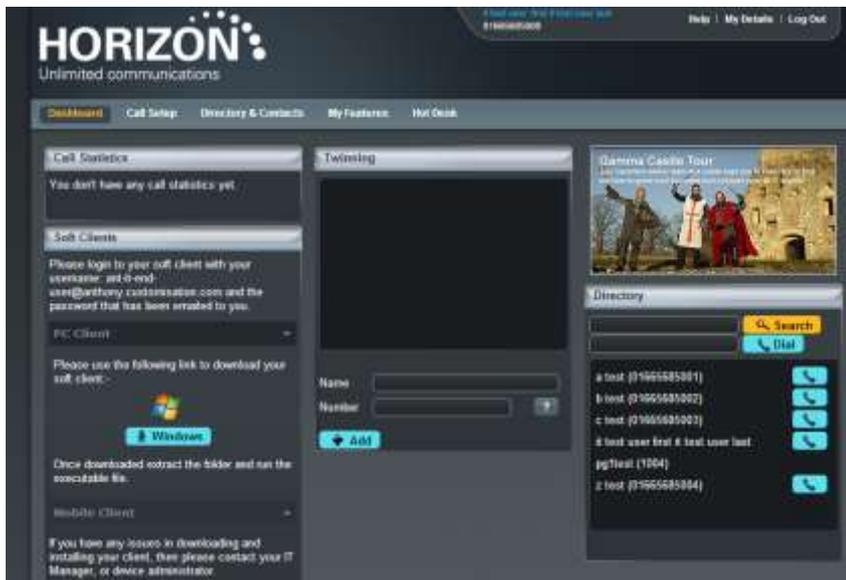
Number Presentation

Number presentation within the Horizon client 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.

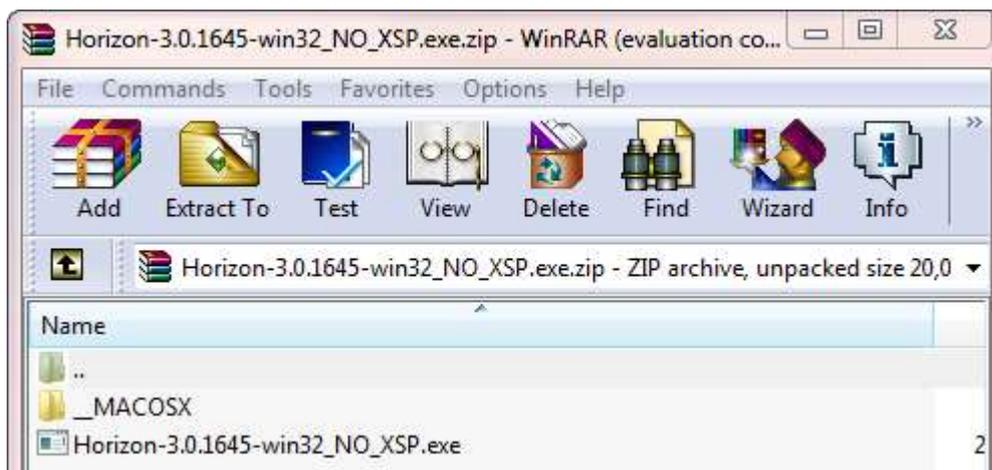
Installing the Mac Soft Client

The Mac 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>".

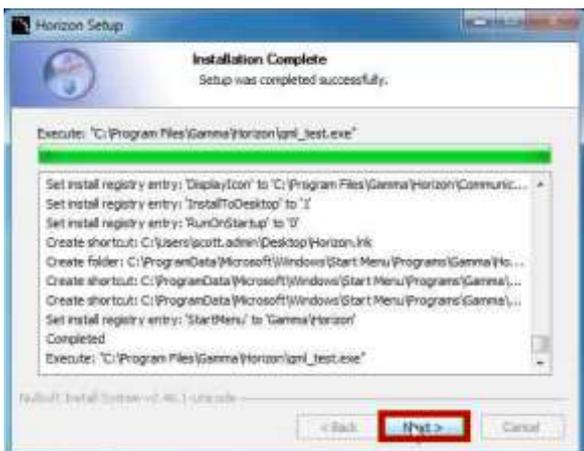




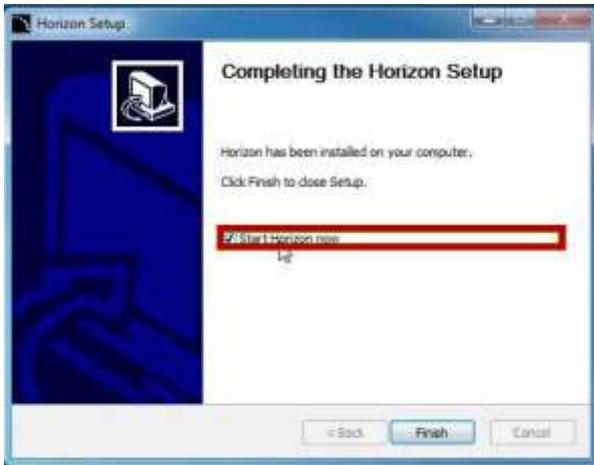
Choose a Start Menu Folder. You can either put it in an existing folder or type a new folder you want it in. Click "Install".



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, Mac 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 open the client, 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.

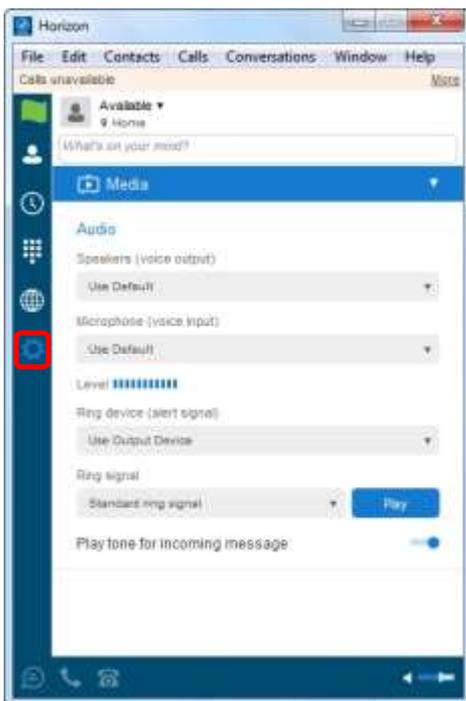
If required, you can request the softphone to remember the password and sign you in automatically.



Audio input/output preferences

To use the Mac 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 Preferences icon and select Media from the drop-down. Select audio at the top, then ensure the output device and input device match are set to your desired choice. Make sure you select the correct built-in/headset option from the drop-down fields in the Speakers, Microphone and Ring Device section.



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;

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

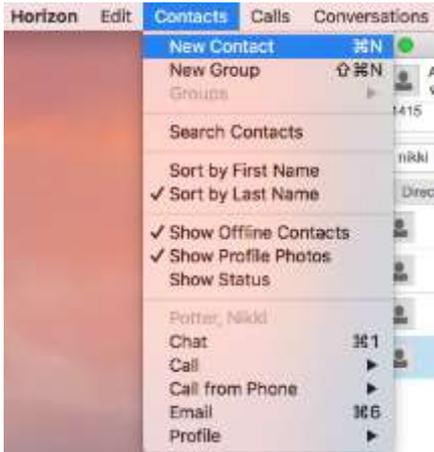




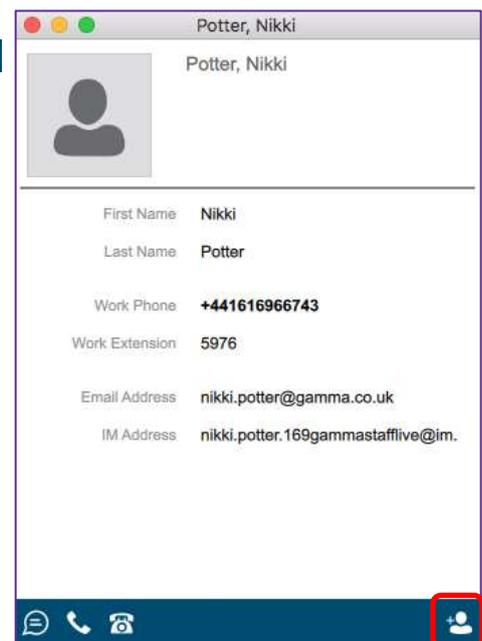
Contacts

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, search for and click the user you would like to add and select 'New contact' from the menu bar.

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.



Their details will then pop up and you can add them by clicking the  icon. They will then be sent a request to share presence with you, once accepted you can see each other's presence and instant message between each other.

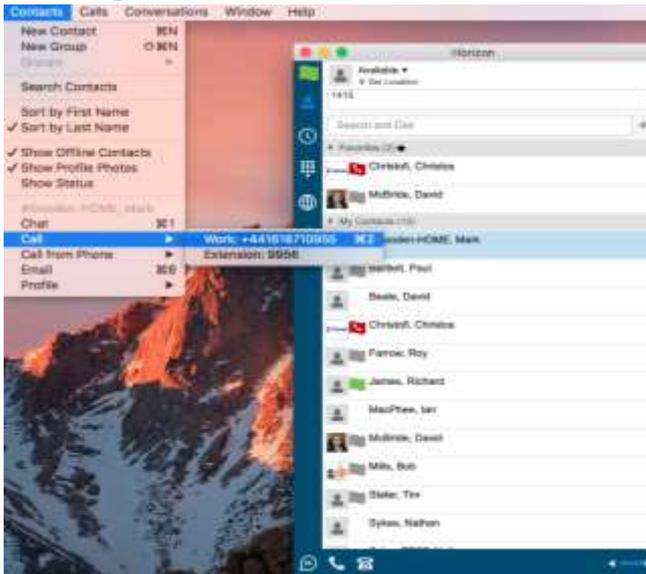


Directories

Contacts stored in the Enterprise Directory (internal), Company Directory (external) and Personal Directory can all be searched using the Contacts tab.

The directory tab will only display contacts from the internal enterprise directory.

Making a call



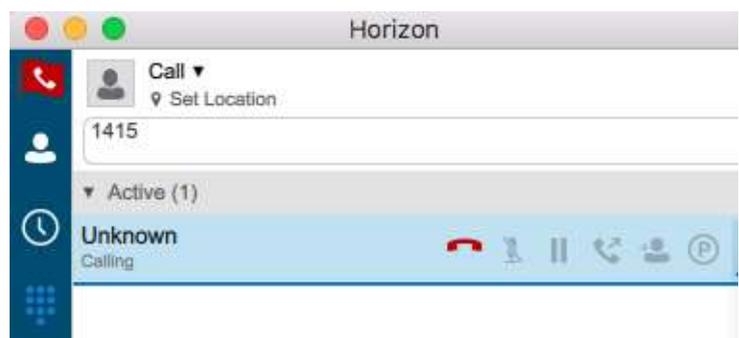
To make a call to one of your contacts you can either;

- You will need to select the Contacts icon from the menu bar and select whether you want to call from your softphone or desk phone
- Highlight the relevant contact and click the  icon depending on the type of call you'd 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

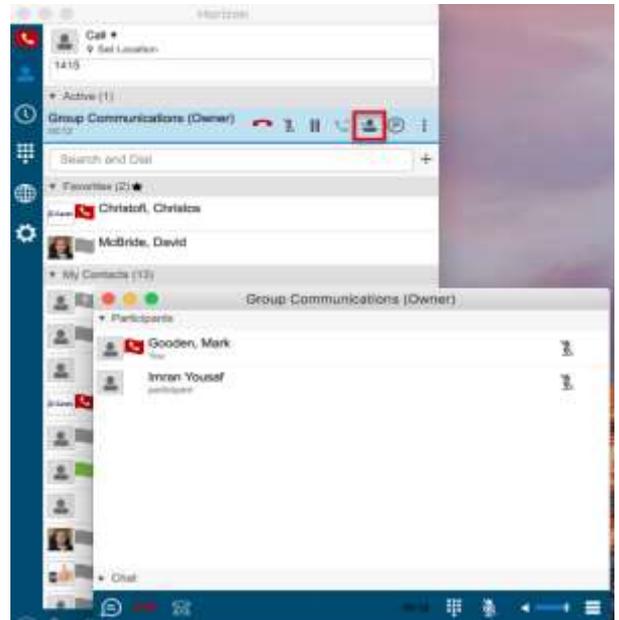




Drag and Drop Conference

You can select the 'Add People' icon (pictured right) and enter the details of the participant for a conference.

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



Initiate a chat

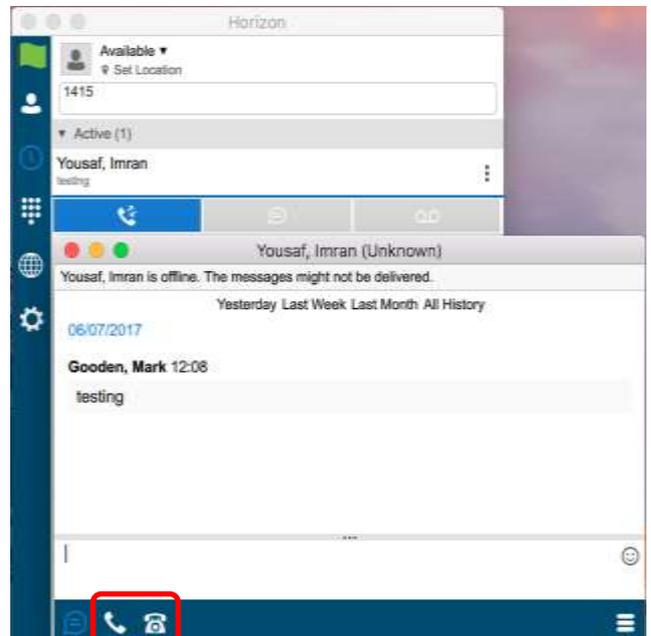
To initiate a chat with one of your contacts, you can either;

- Double click on the contact or
- 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

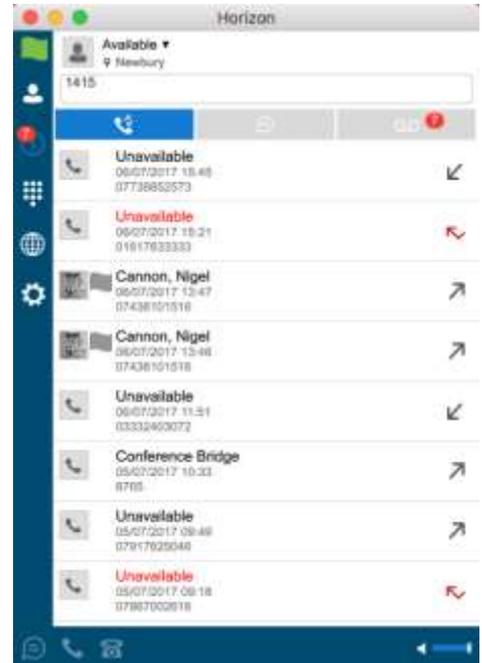
Communication History

The communication history section will show all 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.

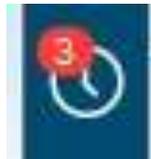
The window has 3 main tabs:

-  Incoming and outgoing call history
-  Chat history
-  Voicemail history

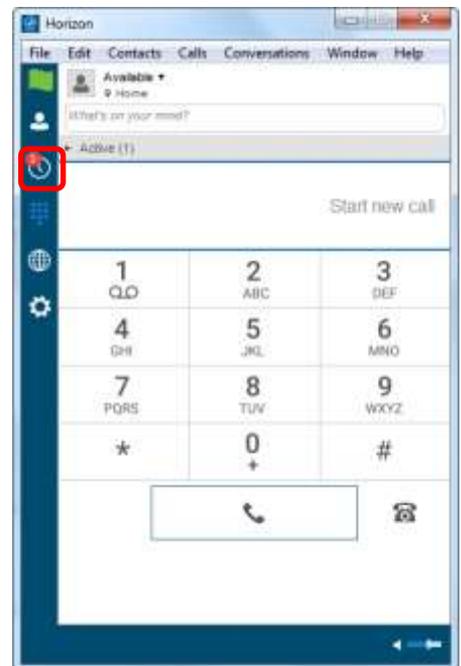
A number being displayed next to the main Communication History icon on the left-hand side bar will represent any missed communications



Any missed communications will be represented by a number being displayed next to the main Communication History icon on the left-hand side bar.



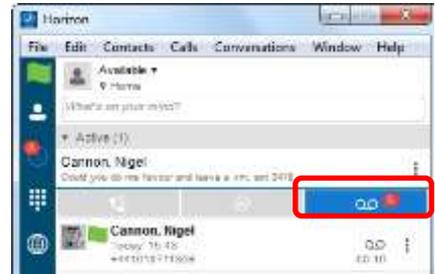
Clicking on the Communication History will reveal what the missed communication was, in this case it was Voicemail notification.



Visual Voicemail

The Voicemail icon at the top of the tab will tell you how many are unplayed. Voicemails are accessed by selecting the tab.

Note: Listening to voicemail on the soft client uses data instead of calling into the voice portal, so internet access would be required to retrieve and play back the voicemail.



Managing the Visual Voicemail

You play back the voicemail by selecting and highlighting the voicemail and then clicking on the play icon.

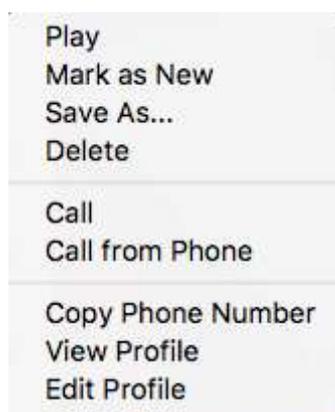
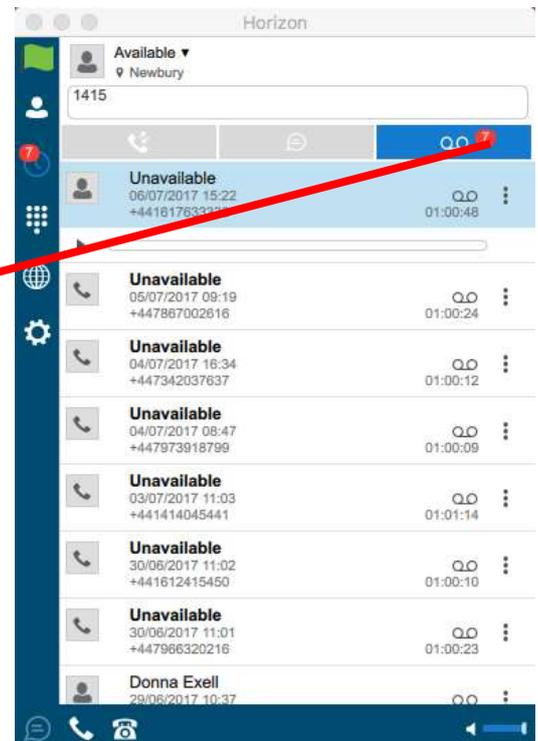
You can also select the  icon to display the Voicemail management actions where you can:

- Play
- Mark as Viewed
- Save as
- Delete



Additionally, you can initiate a Call or Chat to the person or send them an email. The return communication options will vary depending on the level of detail Horizon has within the Horizon directory.

You also have the option to Copy the number, add to or edit a contact profile from the menu.

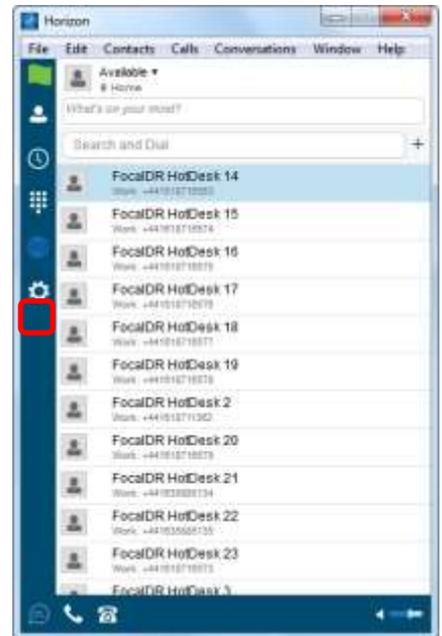




Directory

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 (subject to being added and accepted as a contact) or make a call from your softphone/desk phone.

These options are available via the Contacts in the menu bar or by clicking the relevant icons in the bottom left of the window.



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 dialed number





My Information

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

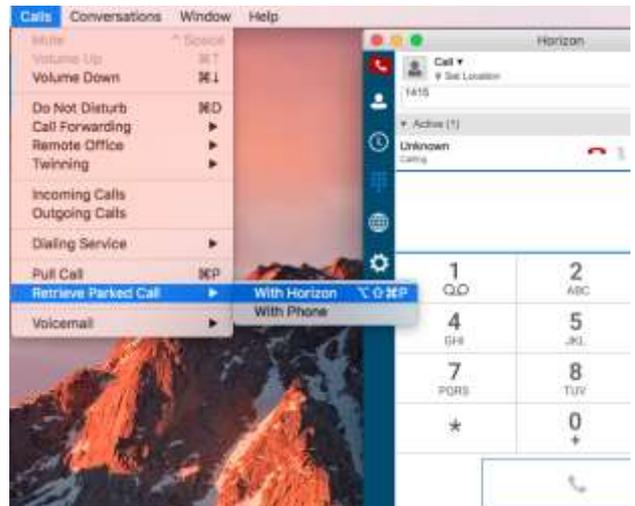
- Status - by clicking the V next to your current status
- Location - by clicking set location
- Profile picture - by right clicking the image section. You can either clear your current picture or add a new one



Pull/retrieve call

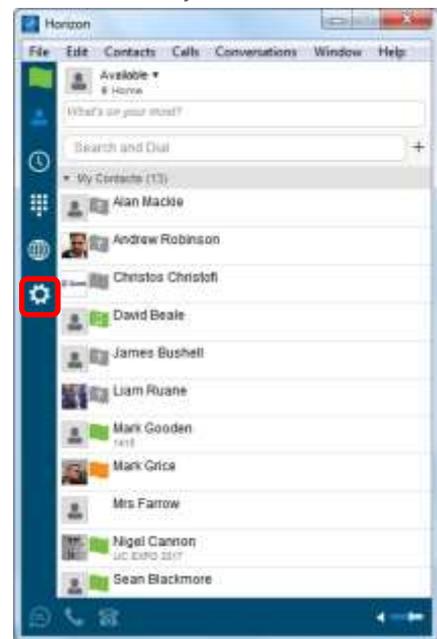
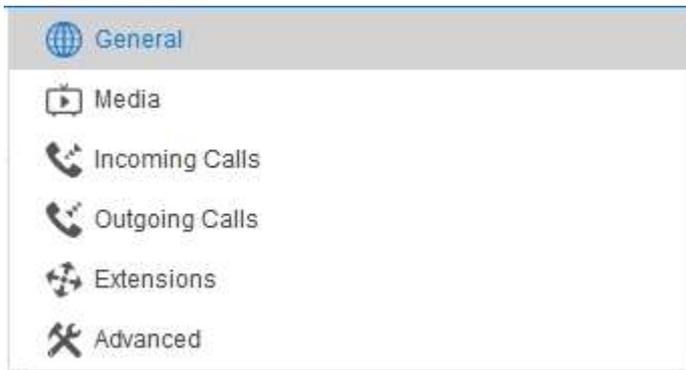
To perform this task, you will need to select Calls from the menu bar and these options allow you to;

- 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.



Preferences menu

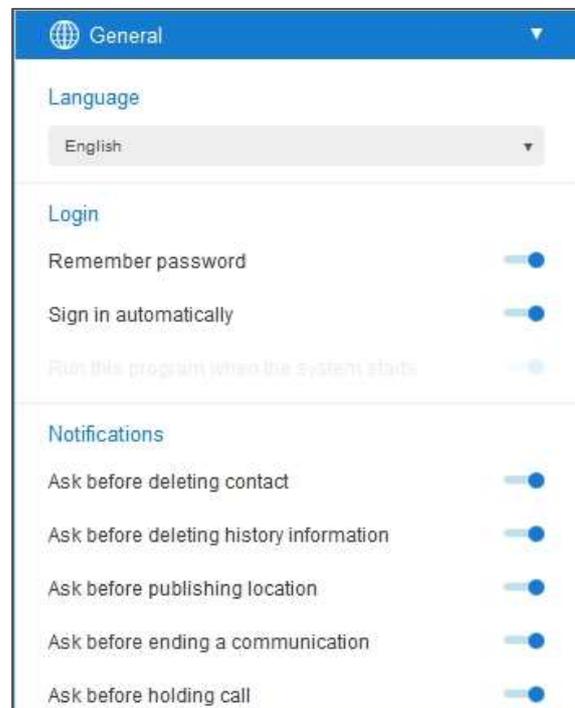
The Preferences menu can be located as indicated in the image to the right. Within here you can access the following topics and settings menus



General

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

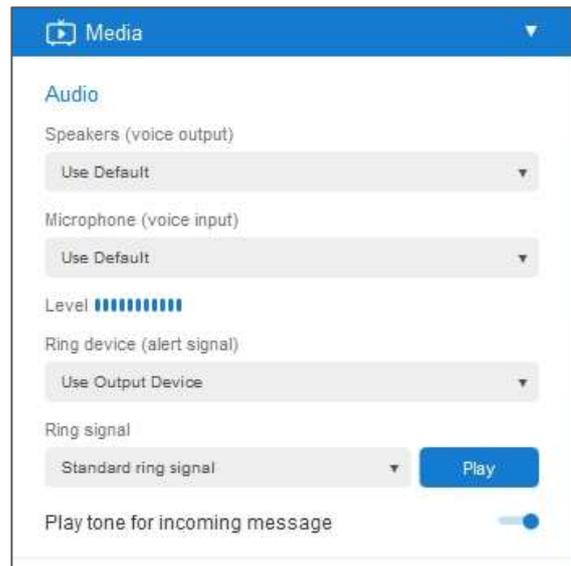
- ◆ Sign in automatically - whether you'd like the softphone to sign you in as soon as it starts
- ◆ Run the programme when the system starts - if you'd like the softphone to start when the Mac starts
- ◆ Enable / disable certain notifications





Media

Here you can specify the devices you'd like to use as your speakers and microphone



Incoming Calls

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

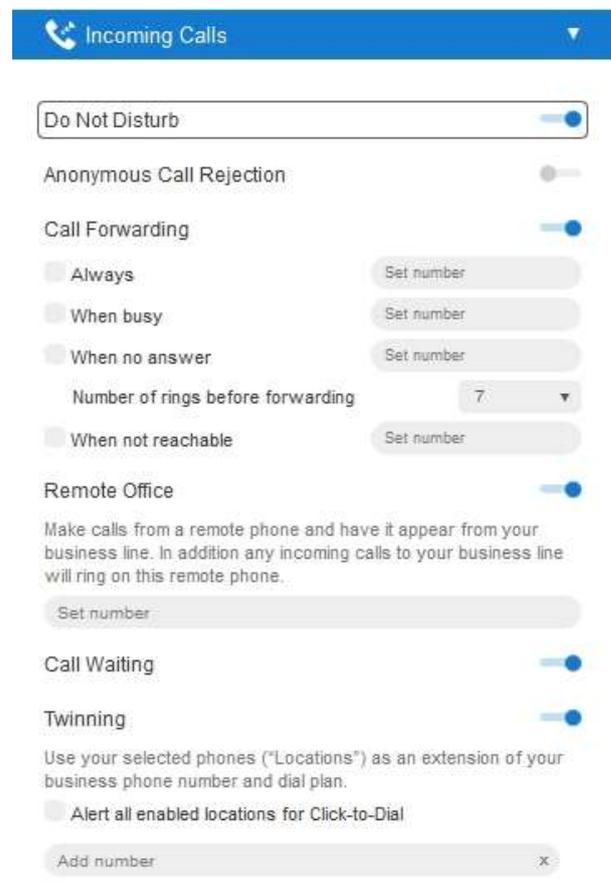
Enable/Disable the rejection of any calls from a caller where their ID is anonymous or withheld.

Here you can enable/disable any Call Forwarding for the four scenarios detailed and maintain the divert numbers 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.

Enable/Disable the Call Waiting feature

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.

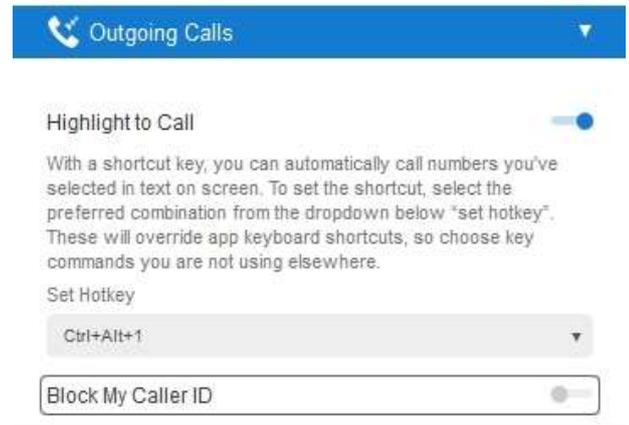


Outgoing Calls

Highlight to Call feature allows you to highlight a number on any of your applications and press a hot key to call the number

It's advised that you select a hot key combination that is not already being used by another application

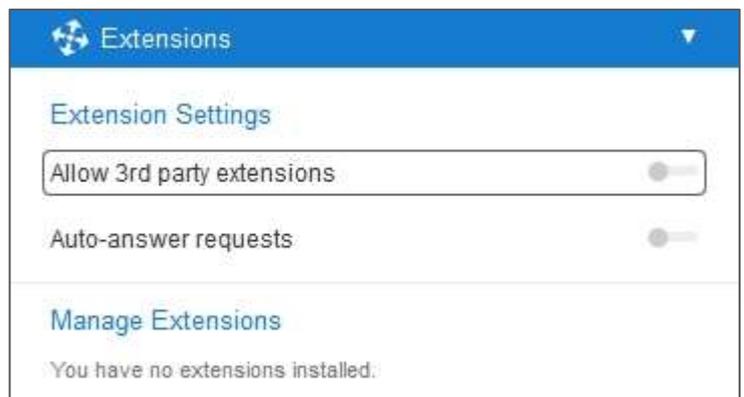
Enable / Disable the sending of your call ID on an outgoing call.



Extensions

This enables enhanced connectivity between a 3rd party extension, for example a headset, and can facilitate call answering and volume control directly via the headset. These extensions sit outside the scope of support and therefore if a 3rd party extension does not work Gamma cannot guarantee to resolve the issue.

You can also choose default behaviour to always reject or accept requests from third-party applications and allow or reject individual third-party applications.



Services

NB: this only appears if the user is assigned as an agent to a relevant Call Centre or Group

The Mac soft client can be used with Call Queue Groups and Call Centre on Horizon (the corresponding agent licence is required for each). The queues menu can be accessed from the settings options at the bottom right of the client. Once selected the following options are available for an agent:

Sign In/Out

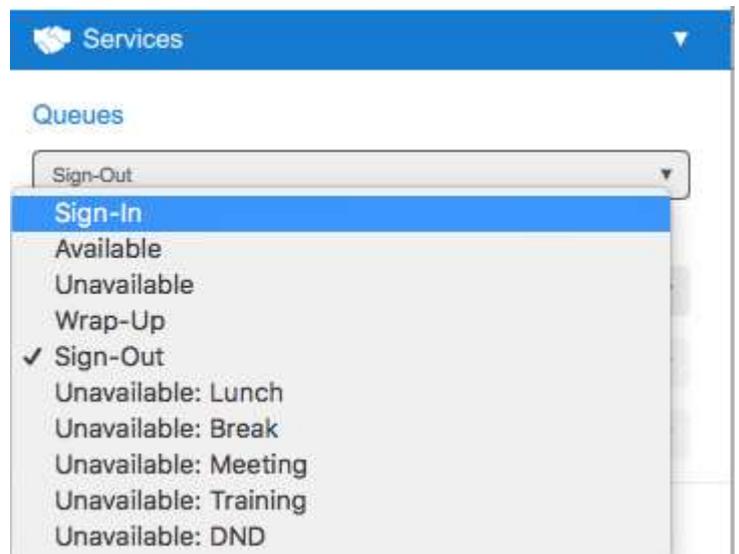
- ◆ Sign-In: Agent can sign in to the call centre

- ◆ Sign-Out: Sign out of the call centre

Agent Status

An agent can also change their status

- ◆ Available - Calls will be routed to the agent
- ◆ Wrap Up - Calls will not be routed to the agent for a period of time set by the administrator. Once this time has expired, the agent will change to available.
- ◆ Unavailable - Calls will not be routed to the Agent

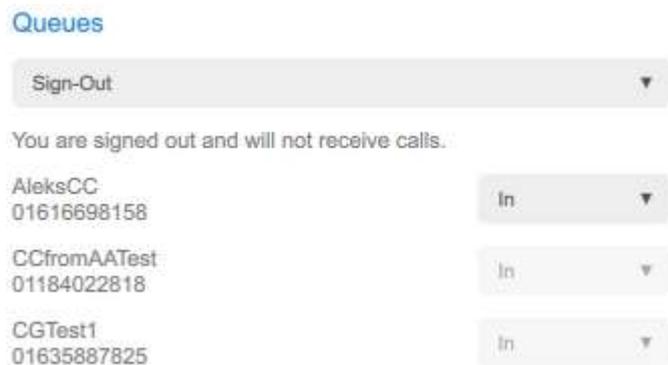


Unavailable Codes

In the example above right, the administrator has switched unavailable codes on and pre-set some options. When the agent selects unavailable, they will now have to choose a reason for the change.

Log in and Out of Queues

If the administrator has set "Allow Agents to Join Call Centres" in the Horizon GUI, then the Mac soft client can be used by the agent to select which call centres/queues groups they want to join.





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 Mac 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 Mac 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.