

Contact Salesforce Integration

Contact can be integrated with third-party Customer Relationship Management (CRM) platforms to enhance the CRM capability provided to a company.

The Salesforce integration allows the company's agents to use Contact within the Salesforce platform. The agents continue to use Salesforce as their main environment, but can use Contact to make and receive calls. Agents can initiate calls from within Salesforce by clicking on the contact's telephone number in the contact page.


Note: In order to make use of Zendesk agents will need to have the required CRM bolt on and the relevant Contact licenses in place.

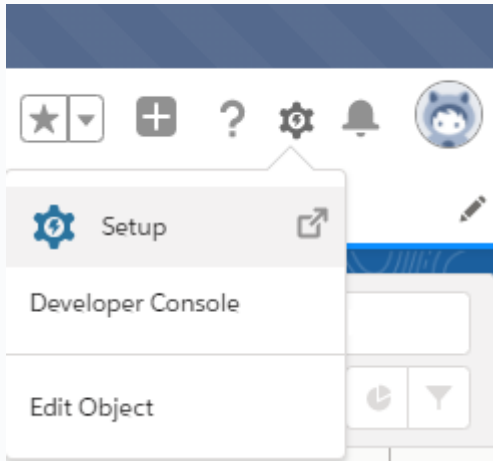
Step 1 - Download the Salesforce integration file

In order to successfully integrate Salesforce and Contact you will need to download the relevant XML file. The file you need to use will depend on the URL being used to log into Contact:

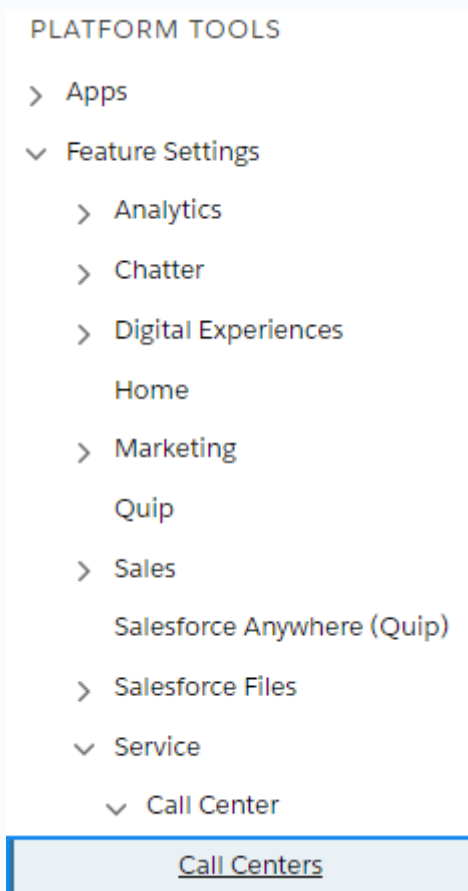
Login URL	File to download
https://contact.unlimitedhorizon.co.uk/login	Horizon-Contact-Salesforce-unlimitedhorizon
https://horizon.contact.gammagroup.co/login	Horizon-Contact-Salesforce

Step 2 - Import the Salesforce file

- Log in to Salesforce as an administrator-level user.
- To go to the Salesforce Setup pages:
 - In the top-right corner, click: 
 - Click Setup.



- Navigate to Platform Tools > Feature Settings > Service > Call Center > Call Centers:



- The All Call Centers dialog is displayed:

SETUP
Call Centers

All Call Centers [Help for this Page ?](#)

A call center corresponds to a single computer-telephony integration (CTI) system already in place at your organization. Salesforce.com users must be assigned to a call center before they can use any Call Center features.

Action	Name ↑	Version	Created Date	Last Modified Date
Edit Del	Horizon Contact		30/11/2020 11:44	15/02/2021 09:03

- Click:
- The Call Center Import dialog is displayed:

SETUP
Call Centers

Call Center Import [Help for this Page ?](#)

To create your first call center record for a CTI adapter that was just installed, import the adapter's default XML call center definition file into salesforce.com. The call center definition file is located in the adapter's installation directory, and is typically named after the type of CTI system that the adapter supports (for example, "CiscoPCCEnterprise7x.xml"). [View sample definition file](#)

New Call Center Import Information | = Required Information

Call Center Definition File | No file chosen

- Import the Salesforce XLM configuration file as follows:
 - Click Choose File.
 - Navigate to the Salesforce XLM configuration file and open it.
 - Click:

Step 3 - Call Centre Settings

- In the All Call Centres dialog, select the name of the appropriate Contact:

All Call Centers [Help for this Page](#) ?

A call center corresponds to a single computer-telephony integration (CTI) system already in place at your organization. Salesforce.com users must be assigned to a call center before they can use any Call Center features.

Action	Name ↑	Version	Created Date	Last Modified Date
Edit Del	Horizon Contact		30/11/2020 11:44	15/02/2021 09:03

- The settings page for Contact is displayed:



SETUP

Call Centers

Call Center

Horizon Contact

[Help for this Page](#)

[All Call Centers](#) » Horizon Contact

Call Center Detail

[Edit](#) [Delete](#) [Clone](#)

Horizon Contact

Internal Name	HorizonContact
Display Name	Horizon Contact
Description	
CTI Adapter URL	https://contact.unlimitedhorizon.co.uk/login?salesforce=true
Use CTI API	true
Softphone Height	750
Softphone Width	350
Compatibility Mode	Classic_and_Lightning

Dialing Options

Outside Prefix	0
Long Distance Prefix	
International Prefix	00

Call Center Users

[Manage Call Center Users](#)

[Call Center Users Help](#)

Call Center Users by Profile

Sales Director	2
System Administrator	3
Total	5

- Click: [Manage Call Center Users](#)
- Navigate to Platform Tools > Apps > App Manager:

PLATFORM TOOLS

▼ Apps

App Manager

AppExchange Marketplace

> Connected Apps


> Lightning Bolt

> Mobile Apps

> Packaging

- The App Manager dialog is displayed:

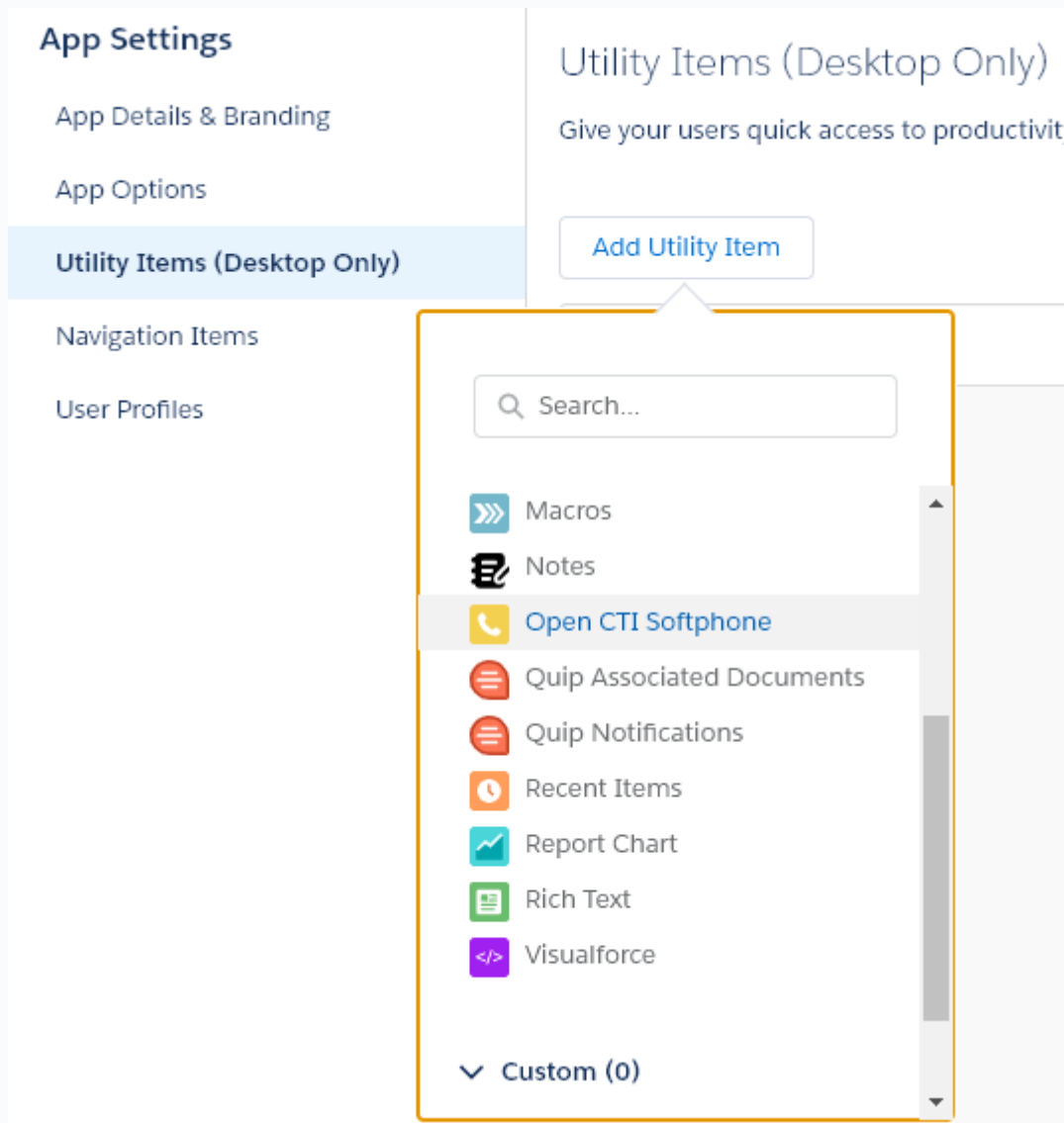
	App Name ↑	Developer Na...	Description	Last Modified...	App Type	Vi...	
1	Accounting	Accounting_Ligh...	FinancialForce Ac...	03/12/2019 19:...	Lightning (Managed)	✓	▼
2	Accounting	Accounting	FinancialForce Ac...	15/08/2020 08:...	Classic (Managed)		▼
3	Accounting Quic...	FFQuickStart		26/07/2020 20:...	Classic (Managed)	✓	▼
4	Action Views	ActionViews	Action Views	03/12/2019 18:...	Classic (Managed)		▼
5	Action Views	ActionViewsLight...	Action Views	03/12/2019 18:...	Lightning (Managed)	✓	▼

- Select the application to which you want to add Contact then click:  and select Edit.

	App Name ↑	Developer Name	Description	Last Modified...	App Type	Vi...	
41	Revenue Management Set...	RevenueManagementSetup		03/12/2019 23:39	Classic (Managed)		▼
42	Sales	LightningSales	Manage your sales process...	30/11/2020 10:32	Lightning	✓	▼
43	Sales	Sales	The world's most popular ...	17/03/2021 14:35	Classic		▼

Step 4 - Softphone Parameters

- Navigate to App Settings > Utility Items (Desktop Only).
- Click Add Utility Item and then select Open CTI Softphone from the dropdown list:



- The Utility Items dialog is displayed.
- Enter parameters for the Open CTI Softphone then click Save.

Utility Items (Desktop Only)

Give your users quick access to productivity tools and add background utility items to your app.

[Add Utility Item](#) Utility Bar Alignment ⓘ Default ▾

Phone	PROPERTIES
Phone	Open CTI Softphone ↑ ↓ Remove
Horizon Contact	

▼ **Utility Item Properties**

* Label ⓘ

Icon ⓘ

Panel Width ⓘ

Panel Height ⓘ

Start automatically ⓘ

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

Step 5 - User Configuration

- Navigate to the Users page under Administration
- On the list of users find the relevant User and click Edit

User Edit
Alex Stanforth

Save Save & New Cancel

General Information Required Information

First Name	<input type="text" value="Alex"/>	Role	<None Specified>
Last Name	<input type="text" value="Stanforth"/>	User License	Salesforce
Alias	<input type="text" value="AStan"/>	Profile	System Administrator
Email	<input type="text" value="alex.stanforth@gamma.co.uk"/>	Active	<input checked="" type="checkbox"/>
Username	<input type="text" value="alex.stanforth-2h9k@force.com"/>	Marketing User	<input type="checkbox"/>
Nickname	<input type="text" value="alex.stanforth-2h9k"/>	Sales Anywhere User	<input type="checkbox"/>
Title	<input type="text"/>	Knowledge User	<input checked="" type="checkbox"/>
Company	<input type="text" value="AWS Company 1"/>	Flow User	<input type="checkbox"/>
Department	<input type="text"/>	Accessibility Mode (Classic Only)	<input type="checkbox"/>
Division	<input type="text"/>	High-Contrast Palette on Charts	<input type="checkbox"/>
		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
		Debug Mode	<input type="checkbox"/>
		Make Setup My Default Landing Page	<input type="checkbox"/>
		Quick Access Menu	<input checked="" type="checkbox"/>
		Development Mode	<input type="checkbox"/>
		Show View State in Development Mode	<input type="checkbox"/>
		Cache Diagnostics	<input type="checkbox"/>
		Salesforce CRM Content User	<input type="checkbox"/>
		Receive Salesforce CRM Content Email Alerts	<input checked="" type="checkbox"/>
		Receive Salesforce CRM Content Alerts as Daily Digest	<input checked="" type="checkbox"/>
		Checkout Enabled	<input type="checkbox"/>
		No MRU Updates	<input type="checkbox"/>
		Call Center	<input type="text"/>
		Phone	<input type="text"/>
		Extension	<input type="text"/>
		Fax	<input type="text"/>
		Mobile	<input type="text" value="+44 7932674074"/> Example: +1 5035550123
		Email Encoding	Unicode (UTF-8)
		Employee Number	<input type="text"/>
		Start of day	06:00

- In the Call Centre field, press the lookup icon
- Select Horizon Contact from the list of results

User Edit
Alex Stanforth

Save Save & New Cancel

General Information

First Name	<input type="text" value="Alex"/>
Last Name	<input type="text" value="Stanforth"/>
Alias	<input type="text" value="AStan"/>
Email	<input type="text" value="alex.stanforth@gamma.co.uk"/>
Username	<input type="text" value="alex.stanforth-2h9k@force.com"/>
Nickname	<input type="text" value="alex.stanforth-2h9k"/>
Title	<input type="text"/>
Company	<input type="text" value="AWS Company 1"/>
Department	<input type="text"/>
Division	<input type="text"/>

Search - Salesforce - Shell Edition - Google Chrome

https://java-site-9979.my.salesforce.com/_ui/common/data/LookupPage?lkm=editPage&lknm=Ca...

Lookup

You can use "*" as a wildcard next to other characters to improve your search results.

< Clear Search Results

Search Results

Name	Version	Created Date	Last Modified Date
Horizon Contact		18/08/2025, 15:46	18/08/2025, 15:46

Copyright © 2000-2025 salesforce.com, inc. All rights reserved.

Checkout Enabled	<input type="checkbox"/>
No MRU Updates	<input type="checkbox"/>
Call Center	<input type="text" value="Horizon Contact"/>
Phone	<input type="text"/>
Extension	<input type="text"/>

- Save the User's settings

Step 6 - Trusted URL

- Navigate to Setup and search for Trusted URLs
- Create a new entry for Horizon Contact:
 - API Name should be Contact
 - URL should be the same as the Contact URL the agent is using

Trusted URL Edit [Save] [Save & New] [Cancel]

Trusted URL Information Help for this Page

Specify the trusted URL information, and select at least one directive.

The trusted URL must include a domain name and can include a port. For example, <https://example.com> or <https://example.com:8080>. To reduce repetition, you can use the wildcard character * (asterisk). For example, *.example.com. For a third-party API, the URL must begin with <https://>. For example, <https://example.com>. For a WebSocket connection, the URL must begin with <wss://>. For example, <wss://example.com>.

API Name:

URL:

Description:

Active:

Content Security Policy (CSP) Settings

To help prevent cross-site scripting (XSS) and other code injection attacks, the Lightning component framework uses CSP to impose restrictions on content. To control which pages can load content from this trusted URL, select the CSP context.

CSP Context:

CSP Directives

Select the directives that Lightning components, third-party APIs, and WebSocket connections can load from this trusted URL. Each CSP directive controls access to a resource type. Lightning components can load the resources within Lightning or within your CSP-secured [Aura or LWR sites](#).

To use the [Salesforce Console Integration Toolkit](#) from within this trusted URL, select the `connect-src (scripts)` directive. Then add the trusted URL in the Security settings of Experience Builder for your [Visualforce sites](#). When you select that directive, connections from Lightning to this trusted URL can use the JavaScript methods in the toolkit. Otherwise, you can't load JavaScript resources from a third-party, even if it's a trusted URL. To use a JavaScript library from a third-party, add the third-party URL to a static resource, and then add the static resource to your component.

connect-src (scripts)

font-src (fonts)

frame-src (iframe content)

img-src (images)

media-src (audio and video)

style-src (stylesheets)

- Save Settings with the Trusted URL configured

Result

Agents should now see Contact softphone within Salesforce.

To use Contact, agents must enter their Contact login details into the softphone.

All Search...
★ + ? ⚙️ 🔔 👤

Sales | Home | Opportunities | Accounts | Contacts | Campaigns | Dashboards | Reports | Chatter

Quarterly Performance

As of Today 1:49 PM

CLOSED GRP.0 OPEN (~70%) GRP.0 GOAL

Horizon Contact

Sign in to your account

Username *

Password *

Sign In

[Forgot password?](#)

you're working on, then come back here to view

Jan Feb Mar

Goal Closed + Open (>70%)

Assistant

Nothing needs your attention right now. Check back later.

Today's Tasks

Nothing due today. Be a go-getter, and check back soon.

☎️ Horizon Contact

Agents can now answer calls within Salesforce

All Search...
★ + ? ⚙️ 🔔 👤

Sales | Home | Opportunities | Accounts | Contacts | Campaigns | Dashboards | Reports | Chatter

Quarterly Performance

As of Today 1:52 PM

CLOSED GRP.0 OPEN (~70%) GRP.0 GOAL

☎️ Horizon Contact

Call In Progress 00:02

Unknown Contact
+441489602967

Queue	Service	Group
Sales Queue	Service Number	Default group
🕒 00:04	441398317410	

Transfer and Consult

Destination

🔍 🔄 ➡️ ✕

Browser | 🔄 📄 ⏪ ⚙️

you're working on, then come back here to view

Jan Feb Mar

Goal Closed + Open (>70%)

Assistant

Nothing needs your attention right now. Check back later.

Today's Tasks

Nothing due today. Be a go-getter, and check back soon.

☎️ Horizon Contact