



NovelVox Smart CTI Connector for Creatio

User Guide



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1. Introduction

1.1 Document Purpose

The purpose of this document is to provide instructions for installing and configuring the NovelVox Smart CTI Connector within the Creatio environment.

1.2 Document Audience

The document is designed for NovelVox Smart CTI Connector users who intend to install and configure the connector within the Creatio environment.

1.3 Confidentiality Statement

All information contained within this document is strictly confidential and shall not be divulged to any third party without CXInfinity's prior written consent. If you have any questions regarding this document, contact:

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2. Prerequisites

Before beginning, ensure the following:

- Administrator access to the Creatio Instance
- CTI embedded prerequisites.

3. Overview

The process to install the Smart CTI Connector is divided into two key phases:

- **Application Installation** – Download and install the connector from the Creatio Marketplace.
- **CTI Configuration and Activation** – Collaborate with the NovelVox team to configure CTI settings and activate the connector URL.

4. Installation & Configuration Steps

4.1 Install the application from the Creatio workspace

This phase covers installing the application from the public Creatio Marketplace website.

1. Open a web browser and navigate to the Creatio Marketplace:

<https://marketplace.creatio.com/>

2. In the main search bar, type 'NovelVox Smart CTI Connector' and press Enter.
3. Locate the application in the search results and open its dedicated page.
4. Click the Install button.
5. A prompt will appear to log in with a Creatio Marketplace account.
6. After logging in, select the desired Creatio instance for installation.
7. Confirm the selection to proceed with installation.
8. The Marketplace will automatically install the application package into the chosen Creatio instance. This process may take a few minutes.

4.2 Contact the NovelVox team for CTI Configuration and URL activation

NOTE: This is a critical step. The connector will not function until the CTI is configured by the NovelVox team.

What is CTI Configuration?

This is a one-time setup process performed by the NovelVox Support team. During this step, they will:

- Configure the CTI embed solution to connect to the designated telephony system.
- Verify all CTI events (such as call ringing, on-answer, and call-end) and map them to the appropriate actions in Creatio (such as screen pop or activity creation).
- Provision and activate a unique, secure CTI URL for the respective instance.

Actions Required:

1. After the application package is successfully installed (upon completion of Part 1), contact the NovelVox Support team.
2. Inform the team that the "NovelVox Smart CTI Connector" has been installed in the Creatio instance and is ready for configuration.
3. The NovelVox Support team will then perform the CTI configuration as outlined above.
4. Upon completion, the NovelVox Support team will provide a unique CTI URL required for the final setup step.

4.3 Configure the CTI URL in Creatio

After the NovelVox Support team provides the unique CTI URL, it must be added to the Creatio system settings to activate the integration:

1. Log in to the Creatio instance as an administrator.
2. Open the **System Designer** (click the gear icon ⚙).
3. Under the System setup section, select '**System settings.**'

4. In the search bar, type '**NV CTI CONNECTOR URL.**'
5. Locate the setting '**NV CTI CONNECTOR URL**' in the list and open it.
6. In the '**Value**' (or Default value) field, paste the complete URL provided by the NovelVox team.
7. Click **Save**.

5. Final Steps

The installation and configuration process is now complete. Log out of Creatio and log back in (or perform a hard browser refresh using **Ctrl + F5**) to ensure the CTI panel loads correctly.

The NovelVox Smart CTI Connector is now active in the instance.

6. Support

For any issues during the installation or for questions regarding CTI functionality, please contact the **NovelVox Support team**.