



Phone lookup for Creatio

Setup Guide

Application setup guide

1. Find out in your web telephony app, how to setup a redirect URL for the completed inbound phone calls.
2. Use this URL to redirect your telephony users after a phone call:

```
http://mydomain.creatio.com/0/Nui/ViewModule.aspx#CardModuleV2/GlbClientSearchPage/+11231234567
```

where:

- mydomain.creatio.com — should be replaced with your Creatio app address;
- +11231234567 — should be replaced with the phone number of a customer you user had a conversation with.

3. Once redirected, users will see the following screen with search results:

The screenshot displays the 'Client search' interface in the Creatio application. The left sidebar contains navigation options: Sales, Dashboards, Feed, Leads, Accounts (highlighted), Contacts, Activities, Opportunities, Orders, Contracts, and Invoices. The main content area shows search results for three categories: Contacts, Accounts, and Leads. Each category has a table of results with columns for Name and various phone numbers.

Contacts

Name	Business phone	Mobile phone	Home phone
Kate Roberts	+1 212 775 9012	+1 212 059 2121	

Accounts

Name	Primary phone	Alternate phone	Fax
Alpha Business	1-212-775-9012	+1 (212) 1541 2944	

Leads

Name	Business phone	Mobile phone
Actual Works, Erlith Roberts	+1 212 775 9012	+1 212 775 9842