#### **Application overview**

"Facebook Form" connector provides integration with Facebook forms used for lead generation and/or other marketing purposes. As a result data from a form submitted by user in Facebook will be saved in the Creatio application for further actions.

The basic functions and customizations are:

- Linking a Facebook page to an application
- · Facebook form fields mapping on the lead fields in the Creatio application
- Lead default values set in the Creatio application

The basic Creatio application settings are:

- Facebook application challenge code used to set verification code of the Creatio application integration service
- Facebook form application Id used to set Id of the Facebook application
- Facebook user token user security token

**Please be noticed:** for setting up the facebook form in Creatio the user must have administration or management rights for the page that will be connected to Creatio, and must be an administrator of the facebook application created according to this manual. If you have an external partner for managing your company's facebook activities, please inform it about this fact. If you don't have a facebook account, you can't set up and use this connector.

If the **facebook application** you need for using the connector **will be set up by anyone else, not you**, you need to sign in Facebook to get User token for the correct working of the connector. For doing this **after you'll be added as a facebook application's administrator go to the chapter 5 Section 1 of this Manual** and obtain your Extended user token for saving in Creatio. Only after this, you might set up the new facebook form in your Creatio.

#### Section 1. Facebook application creating and setting

In order to use "Facebook Form" connector firstly you have to set up and verify Facebook application. For an unexperienced user this operation will take about 10 minutes and has to be done only ones.

#### 1. Preparation

a. Please check the **"Facebook application challenge code"** system setting in your Creatio application. It must be filled. The default value of the setting is **"12345678"**. In further steps you should use this value.

> ≡	System settings New Folder • ADD SETTING ACTIONS •			What can I do for you? > bpmonline	0.
) +	<ul> <li>→ Favorites ×</li> <li>→ ▲ All</li> <li>▲ Landing pages section settings</li> </ul>	♀ Filter ▼ Name: Facebook form application id	Code FacebookFormApplicationid		
211 111	Leads section settings     Administration     Approvals     Bpmonline cloud services	Facebook application challenge code OPEN COPY DELETE Facebook forms application user token	FacebookChallengeCode		]
۳۹ al	Configuration Default values Cacebook forms	1			00
					0

Please notice that work with system settings requires administrative rights.

b. Please be noticed that "Facebook Form" connector requires additional settings on the server side provided by Creatio support team.

Please be sure that service is fully operational – for this please enter the following URL in your browser: https://{your Creatio URL}/0/ServiceModel/FacebookWebhookService.svc. You should see the following page:

FacebookWebhookService Service
You have created a service.
To test this service, you will need to create a cleart and use it to call the service. You can do this using the svould, exe tool from the command line with the following syntax:
sventil.sse https://bastd.sasroduction.cs/2/ReviceNotal/FacebookWebhookEsvuce.svc/redi
You can also access the service description as a single file:
https://huntd.asproduction.og/0/ServiceNodel/FaceNooKNehhookService.svc/sinaleNedi
This will generate a configuration file and a code file that contains the client class. Add the two files to your client application and use the generated client class to call the Service. For example:
C2
<pre>sets vers dest sets vers dest v</pre>
Visual Basic
<pre>Class Inst Date field that Melliclient = Hew Melliclient()</pre>

Otherwise please contact the Creatio support team.

c. Check the system settings for the web leads (find it by the code "WebLead", see the screeshot). If these settings are empty, fill them in with the Creatio's administrator data (recommended).

System settings		What can I do for you?
NEW FOLDER * ADD SETTING ACTIONS *		
- + Favorites X	Code: WebLea X	Code
- All	User password for creating leads from third-party resources	WebLeadUserPassword
Leads section settings	Username for registering leads from external resources	WebLeadUserName
+ 🛅 Administration	OPEN COPY DELETE	
Approvals		
+ 📒 Bpm'online cloud services		
Configuration		

#### 2. Create a new Facebook application.

a. <u>Open "Facebook developers" page</u> under your Facebook account and create a new application, do this by click on the "**My Apps**" item.



b. On the opened page click on the "+ Add a New App" button (or choose this item in "My apps" menu):

🔢 Apps 🜉 Themises 10 1000- 🖬 data balan 🚛 it lancasi datifita 👔 nanasana anatara 🦿 Takini datifati 📳 hamatana anatara 👔 Takini datifati 👔 hamatana anatara 👔 Takini datifati hati 👔 hamatana anatara 👔 Takini datifati hati takini d		
facebook for developers Products Docs Tools & Support News Videos Q Search My Apps -	İ	
Q Search apps by title		

c. Please fill "Display Name" and "Contact Email" fields, then click on the "Create App ID" button:

Q Searc	h apps by title	+ Add a New App		
8	Create a New App ID Get started integrating Facebook into your app or website	35		
	Display Name New integration	<b>o</b>		
63	Contact Email	74		
	By proceeding, you agree to the Facebook Platform Policies. Cancel Create A subjourded by the facebook Platform Policies. Cancel Create A Page 12: 097 090 12/275000 Platform Policies. Cancel Create A	pp ID IU: 100232		

d. Proceed to security check:

	and the second se	
App ID:	Creat Security Check Get start Please type the text in the box	16867113421
Aurik s App ID:	Display N New bp	ктика • 4071878059
App ID:	Contact E ds@au ds@au ds@cal ds@ca	• 0 744040386657
ECM Pr App ID:	C o ji 10? By proceed seasonacement Submit Cancel	те Арр ID нур но-това:82367971613

e. In case everything is good you will see the Facebook application settings page:

🚳 New bpm'online i 👻	APP ID: 289251558231014 Analytics		# Tools & Support Docs	
Dashboard				
Settings				
Roles	Select a product			
Alerts				
App Review			<b>F</b>	
PRODUCTS	A consume Mite	Freebook Lonin	Audiones Network	
+ Add Product	Account Are Seamless account creation. No more passwords.	Facebook Login The world's number one social login product	Autoience network Monetize your mobile app or website with native ads from 3 million Facebook advertisers.	
		$\bigcirc$	@	
	Analytics Understand how people engage with your business across apps, devices, platforms and websites.	Messenger Customize the way you interact with people on Messenger.	Webhooks Subscribe to changes and receive updates in real time without calling the API.	

Now you have to customize your new Facebook application in order to integrate it with your Creatio application. Application Id (**APP ID in the left top corner of the page**) has to be copied to the **"Facebook form application Id**" system setting.

## 3. Facebook application customization

When a user submits a Facebook form, the special event is being generated. This event can be submitted to Creatio application for further proceeding by the user or on the system level. In order to do this, a Webhook within a Facebook application has to be created and customized.

a. On the Facebook application settings page please click on the "Webhooks" option:

🔯 New bpm'online i 👻	APP ID: 289251558231014 At View Analytics		🐞 Tools & Support Docs
Dashboard			
Settings			
Roles	Select a product		
Alerts			
App Review			
5000UCT5			
+ Add Product	Account Kit	Facebook Login	Audience Network
	Seamless account creation. No more passwords.	The world's number one social login product	Monetize your mobile app or website with native ads from 3 million Facebook
			advertisers.
		$\bigcirc$	
			Webhooks
	Analytics	Messenger	Subscribe to changes and receive updates
	Understand how people engage with your business across apps, devices, platforms	Customize the way you interact with people on Messenger.	in real time without calling the API.
	and websites.		Read Docs Set Up
×	(ŵ)		
tacobacty tor developers			-

b. On the opened page please select "**Page**" item from the list:

🔯 New bpm'online i 🔹	APP ID: 289251558231014 - * View Analytics	¥	Tools & Support Docs	1
Dashboard				
Settings	Webhooks Learn More			
Roles				
Alerts	User * <sub>D</sub>			
App Review	Page You are not subscribed to this topic.			
	Permissions Subscribe to this topic			
Webhooks	Application			
+ Add Product	Native Components			
	Instagram			

c. Then click on the "Subscribe to this topic" button:

New bpm'online i 🔻	APP ID: 289251558231014 ->* View Analytics	Tools & Support	Docs	
Dashboard				
Settings	Webhooks Learn More			
Roles				
Alerts	Page 🛩			
App Review	You are not subscribed to this tasks			
PRODUCTS	Subscribe to this topic			
Webhooks				
+ Add Product				

Fill "Callback URL" and "Verify token" fields with the following values: Callback URL - https://{your
 Creatio URL}/0/ServiceModel/FacebookWebhookService.svc/SaveFacebookLeadData (for example:

https://test.creatio.com/0/ServiceModel/FacebookWebhookService.svc/SaveFacebookLeadData), Verify token – "Facebook application challenge code" value that was set in the Creatio application (1a). Default value of the "Verify token" is **1234678**.

Then click on the "Verify and Save" button.

New bpm'online i •	APP ID: 289251558231014 Analytics	🛎 Tools & Support Docs 🚺
Dashboard		
Settings	Webhooks Learn More	
Roles		
Alerts	Data at	
App Review	Edit Page Subscription	
PRODUCTS	Callback URL	
Webhooks	https://bpmtest.asproduction.cz/0/ServiceModel/FacebookWebhookService.svc/SaveFacebookLeadData	
+ Add Product	Verify Token	
	12345678	
	Creat Vieth and Sun	
	Califier Verily and Save	

In case you've got an error, please check provided URL and Verify token value. After this control the URL (https://{your Creatio URL}/0/ServiceModel/FacebookWebhookService.svc/SaveFacebookLeadData) in your browser, you might see the blank page (without any text on it).

If you see information about the mistake, the problem may be in web server configuration or system settings for the web leads (see 1c of this manual). If you have a cloud version of Creatio please contact the Creatio support team and attach the description of the mistake on the page. If you have an on-premise version of Creatio contact your system administrator.

e. In case everything is good, you'll be redirected to the webhooks subscriptions events page, on which you <u>must</u> subscribe on the **leadgen** event:

New bpm'online i 🝷	APP ID: 289251558231014 🛛 🛹 View An	alytics			ä	Tools & Support	Docs	î
Dashboard								
Settings	home	etown	v2.10 - Test	v2.10 × Subs	cribe			
Roles	hours	5	v2.10 - Test	v2.10 - Subs	cribe			
Alerts			-0.40 - 7-4					
App Review	iedug	len .	V2.10 · Test	V2,10 + SUBS	cribe			
	live_v	videos	v2.10 - Test	v2.10 ¥ Subs	cribe			
Webhooks	locati	ion	v2.10 - Test	v2.10 - Subs	cribe			
+ Add Product	mem	bers	v2 10 - Test	v2 10 × Subs	cribe			5
			TAIL IN THE REAL	12.10		_		
	gener	ral_info	v2.10 * Test	v2.10 * Subsc	ribe			
	gener	ral_manager	v2.10 - Test	v2.10 - Subst	ribe			
	home	stown	v2.10 - Test	v2.10 - Subsc	ribe			
	hours		v2.10 - Test	v2.10 × Subsc	ribe			
Webhooks	leadg	jen	v2.10 - Test	v2.10 - Unsub	scribe			
	five_v	ndeos		v2.10 - Subsc	ribe			
		You have successfully subscri	bed to leadgen. 🗙					
	locati	on	v2.10 * Test	v2.10 - Subsc	ribe			
	ment	bers	v2.10 * Test	v2.10 * Subsc	ribe			

## 4. Application domain setting

a. On the Facebook application page open "Settings" page - Basic:

🄯 Test bpmonline in 🕶	APP ID: 720669208137984	View Analytics			🐞 Tools & Support Docs 🚺
Dashboard		current_location	v2.10 • Test	v2.10 * Subscribe	
Settings		description	v2.10 - Test	v2.10 - Subscribe	
Roles		email	v2.10 - Test	v2.10 - Subscribe	
App Review		feed	v2.10 - Test	v2.10 - Subscribe	
PRODUCTS		founded	v2.10 - Test	v2.10 - Subscribe	
Facebook Login		general_info	v2.10 - Test	v2.10 - Subscribe	
Webhooks + Add Product		general_manager	v2.10 - Test	v2.10 - Subscribe	
		hometown	v2.10 - Test	v2.10 - Subscribe	
		Qurs	v2.10 - Test	v2.10 - Subscribe	
		leadgen	v2.10 - Test	v2.10 - Unsubscribe	
		live_videos	v2.10 - Test	v2.10 - Subscribe	

b. Then you should add a platform and domain using the button at the end of the page. We also recommend you adding the app icon and the privacy policy URL on this step (you'll need this data for the reviewing the app by Facebook's team, see the "App Review" file):

🔞 Test bpmonline in 🕶	APP ID: 720669208137984	View Analytics					₩ Tools & S	Support Docs
Dashboard								
Settings		App ID		App 9	ecret			
Basic		720669208137984					Show	
Advanced								
Roles		Display Name		Name	space			
Alerts		rescincegration						
App Review		App Domains		Conta	ict Email			
PRODUCTS				ds@	auriksystems.cz			
Facebook Login		Privacy Policy URL		Terms	of Service URL			
Webhooks		Privacy policy for Login	dialog and App Details	Tern	ns of Service for Login dialo	g and App Details		
+ Add Product		App Icon (1024 x 1024)		Categ	lory			
				Choc	ose a Category 👻			
		+						
		1024 x 1024						
	E E							
				+ Add Platform				
	L							
facebook for developers							D	iscard Save Changes
Dashboard								
Settings		Select Platform						
Basic						1	Show	
Advanced								
Roles		6		é	. 🚔 .			
Alerts								
App Review		Facebook Web Games	Website	ios	Android			
PRODUCTS								
Facebook Login			=1					
Webhooks				$\langle \rangle$	23	and App Details		
+ Add Product		Windows Ann	E Rade Tab	They	PlayStation			
		windows App	rage lab	ADUX	FlayStation			
					Cancel			

c. Fill in the URL of your Creatio application and save settings.

App Review PRODUCTS Facebook Login Webhooks		1024 x 1024	Choose a Category *		
	l⊋	Website Site URL <u>your application</u> URL		Quick Start X	
			+ Add Platform		
facebook for developers					Discard Save Changes

On this step Facebook application customization is complete. The last thing you have to do is to obtain user security token.

## 5. User token obtaining

a. Please click on the "Tools" button:

facebook	for developers			Docs Tools	Support My Apps Q Search develo	pers.facebook.com
	test		APP ID: 720669208137984		💽 💽 Status: Live 🦯	View Analytics
	<ul> <li>Dashboard</li> <li>Settings</li> </ul>		Address			
	Basic		Street Address			
	🛱 Roles	*	Apt/Suite/Other (Optional)			
	App Review					

## Please click on the "Access Token Tool" item:

← → ℃ ŵ	① 🔒 https://developers.facebook.com/tools/			90%	♥ ☆	$\overline{\mathbf{\Lambda}}$	111	-		₽	×
facebook for developers		Docs	Tools	Support	My Apps	Q Search develope	s.facet	ook.c	mo		

# **Developer Tools**

<b>(</b>	20	đ
Graph API Explorer	Sharing Debugger	Access Token Debugger
Test, create, and authenticate API calls and debug responses.	Preview how your content will look when it's shared to Facebook.	See detailed info for an access token
Other Developer Tools		Business Tools
Access Token Tool		all Analytics
		1. SO NO STREES YOU AND A STREET ON ST
Generate user and app access tokens for testing.		🗐 Ads Manager
Generate user and app access tokens for testing.		<ul> <li>Ads Manager</li> <li>Monetization Manager</li> </ul>

c. Find your application in the list, click on the "You need to grant permissions to your app to get an access token" for obtaining user token for the application. User token will be generated.

101 101		
10011000	the second second second second second	Trans.
The Dist.		1000
New integrat	ion	
User Token	You need to grant permissions to your app to get an access token.	
App Token	289251558231014 (GGgLED6UoHW0wA7b1NSNKX5ul0o	Debug
-		
ine line	and the second s	1000
-	Construction of the state of th	100mm

-1478 1476		
-	the second s	1 million
Tan Tituti		100
New integra	tion	
User Token	EAAEHEqBhC2BYBAP16ij2BXP2A2B3CApbPTf50G0cDDqa6w3LDg455iApzuBJcvw2AORXSMYreL4Jaw0cMh7Hmf	Debug
App Token	289251558231014   GGgLED6UoHWOWA7blNSNKX5u10o	Debug
-	C	
	the second	1054
122 1000	Contraction of the service of the se	100m

This first time generated token is a short life token (can be applied during the very short period), thus in case you'll want to extend it, please click on the "**Debug button**", then click on the "**Extend Access Token**" button. Token will be prolonged, the expiration date will be shown.

	er Batch Invalidator Access Token	API Version: [?] v2.10 *
EAAEHEqBhCZBY	BAPI6ijZBXPZAZB3oApbPTf50G0cDDqa6w3LDG455iApzuBJcvwZAORxSMYreL4Ja	wOcMh7Hmfn4FnNyZAd7GVyLuZBYSRI6JQEg0xdGzGzZBa5\ Debug
Access Token	Info	
App ID	289251558231014 : New Integration	
Туре	User	
User ID	1514985885250155 : Dmitry Stepanov User last installed this app via API N/A	
Issued	Unknown	
Expires	1510063200 (in about an hour)	
∂ Valid	True	
Origin	Unknown	
Scopes	user_friends, public_profile	
Extend Access To This new long-	ken lived access token will expire on January 6th, 2018:	
EAAEHEqBhCZi	YBAFIgrcIZATUquKJZ ihugKBXdfXO3 kRz/INs4Cs/BBAC6LmaXTR5J	CCP2KPpvFJsor8ToMMCMV Debug

Please notice that after the expiration date you have to repeat actions described in section 1 paragraph 4c in order to have service fully operational or to obtain a life-long user token.

More about Facebook user tokens you can find here

d. User token has to be copied to the "Facebook user token" system setting in your Creatio application.

Please be noticed, the Facebook API permissions model has been updated. So your app, if it was created before May the 1<sup>st</sup>, 2018, need to be submitted for review by August the 1<sup>st</sup>, 2018. If your app will not be submitted for review by this date, you can lose access to the permissions and features used in the application and the Facebook connector will not work.

All new apps must be submitted for the review even for testing.

## Section 2. Working with Facebook forms in the Creatio application

For setting integration with Facebook forms please use "Facebook Form" section. In case section is not available on the section panel, please add id with workspace designer.

You should create one record in "Facebook Form" section for each Facebook form you are planning to work with.

Please notice that this version of service can only proceed fields of simple data types (text, integer and decimal number).

≡	• + <	Test Facebook lead integration	What can I do for you? > Creatio	Q
Sales		SAVE CANCEL ACTIONS -	VIEW 🕶	*
21	Leads	Facebook form name <sup>®</sup> Test Facebook lead integration CONNECT TO FACEBOOK		1
	Accounts			
-	Feed	Kentersel and the second		
al	Dashboards	Facebook pages		
	Contacts	Facebook page Aurik systems		0
F	Activities	Page parameters		õ
₹	Opportunities	Facebook page kt 716019655509963 Facebook form kt 283444138001174		G
F	Documents	EAAEFlaUCA2cBAD007Uc2sZAyQITCZAOLECidENQaNZCZCYx4x5856FV3kTZAR4wZAV482BGRWM1ckWxEPBIvAyGmC7L92 MzCm20aNxGHu/KHmbwUCZAZAX2Cp8FBFFuZAR947m5dsAA0rkj13qmQ2D2D	IWVgiFZAN1LhkwSRZA3gq24wi9gDDpFbNVl2DCrFyKZAHhCQyb2CRAwV4kTVZCUpe1	ŏ
-	Products	Customer default need * Facebook Lead		
	Knowledge base	Lead fields in Facebook form + 1		
	Encohorali farmer	Facebook form field name Lead field name		
	Pacebook forms	prone_number Mobilernôfié		
		full name Contart		

Field name	Field description
Facebook form name	The displayed Facebook form name
"Connect to Facebook" button	Performs a secure connection to Facebook, loads the list of the pages available for the logged user
Facebook pages	Contains the list of the available Facebook pages for the logged user. <b>Please be noticed</b> , that the list of pages contains only that pages, where you have administration or management rights.
Facebook page	Name of the selected for linking/linked Facebook page
Page is linked	Shows, if the selected page was linked
Facebook page Id	The id of the Facebook page (is filled automatically by linking procedure)
Facebook form Id	Facebook form Id, can be found on the form setting page of by the <u>following link</u>
Facebook page token	Facebook page token (is filled automatically by linking procedure)
Customer default need	Default need in generated lead
Lead fields in Facebook form	Correspondence between Facebook form fields and lead fields
Default values for the lead fields	Default values in lead

2. Facebook page linking. After the new Facebook form record was opened, you have to fill the name of the record and then to connect to Facebook.

Please notice that all the following operations should be done under the same Facebook user account, which was used for User token Generation, otherwise you will get a security exception error.

If the connection to Facebook was established, in the field "**Facebook pages**" all pages available for the logged user will be listed. You should choose the page, which contains the required Facebook form, and click on the "**Link page**" button.

3. Obtaining Facebook form Id and Facebook form fields mapping. To select a specific form that is configured on the linked Facebook page, use using <u>lead testing tool provided by Facebook</u>. Copy the Form Id and fill in the "Facebook form Id" field on the page.

Lead Ads Testing To	bl			
Use this tool to test yo	ur API or CRM integration. You	can create a test lead to	o confirm that your integration is set up to receive data correctly	6
Page: Form:	Aurik systems      Select F Untitled form 24.8.2017-copy	acebook page here Preview form		
Select required Facebook form here	Untitled form 24.8 2017-copy Untitled form 24.8 17 Untitled form 14.8 2017	d 1620049904752420 email full_name	) lead in order to create a new one: On mouse hover over selected form you'll see form id and form field names	
WEBHOOK SUBS	CRIPTION FOR THE SELECT.	phone_number		
App ID			Subscribed Fields	
720669208137984			leadgen	

After the page was linked you should map Facebook form fields on the lead object fields in your Creatio application. For doing this please use "Lead fields in Facebook form" detail on "Facebook form" page and click the "Download" button:

$\equiv$	• +	Credit View Control	0 0
Sales		VIEW ACTIONS*	~ *
A	Leads	Facebook from name." Test Facebook lead integration CONNECT 10 FACEBOOK	
•	Accounts		
-	Feed	BASIC SETTINGS     LEAD DEFAULT VALUES     ATTACHMENTS AND NOTES     FEED	>
-1	Dashboards	Indetbook pages     Facebook pages     Excelosite pages	
		Pacehook page Aurok systems	
-	Contacts	Pagein leinet 🕑	C
F	Activities	Page parameters	ē
Ŧ	Opportunitie	Facebook page 12 716019635599983	ā
Mr.	Documents	Tacabook tram lis 1e20049904792420 EAAK/PEAMOQRABICE41 WU209HB8/F2CQHHUJUg2BCFRigD2AGGRULLU39v/bz/BSKHuJgW75XUTLQLZAhmBubUkI1WY1oq4amc0UhgHw2iWemcV6C2QIYvyrJU2C9UgBF2Cx3bTnFA44UbBrC0Iv9j1W7zqA Facebook page tolem	0
	Products	Customer default news <sup>1</sup> Facebook Laad	
	Knowledge ba	ase Lead fields in Facebook form + :	
		Facebook form field name Lead field name	
f		mn phone_number MobilePhone	
		emai Emai	
		full_name Contact	

**ATTENTION!** You should use only Facebook form field's names for mapping:

Lead fields in Facebook form + :				
Facebook form field name	Lead field name			
phone_number	MobilePhone			
email	Email			
full_name	Contact			

After everything was done, you might to submit an application for review in Facebook. We've prepared for you a detailed instruction – "App Review".

= Leads 🛛 🔻	APP ID: 199151534281698	OFF Status: In Development -> View Analytics
🕈 Dashboard	API Stats	Current Application Level Rate Limit Status
Settings	Calls Errors Average Request Time	Limit Approaching Limit
App Review PRODUCTS Facebook Login Webhooks	220 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	0% 0% 0% Call Count OPU Usage Request Time Current Usage Percentage
Activity Log	Application Level Rate Limit History	Facebook Login
	1005 Last 24 Hours e	Active Login Users Trend Promote Installs
	API Utilization	