

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.



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 client and use it to call the service. You can do this using the svcutil.exe tool from the command line with the following syntax:

```
svcutil.exe https://bpmprod.asproduction.cz/0/ServiceModel/FacebookWebhookService.svc?wsdl
```

You can also access the service description as a single file:
<https://bpmprod.asproduction.cz/0/ServiceModel/FacebookWebhookService.svc?singleWsdl>

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:

```

C#
class Test
{
    static void Main()
    {
        HelloClient client = new HelloClient();
        // Use the 'client' variable to call operations on the service.
        // Always close the client.
        client.Close();
    }
}

```

Visual Basic

```

Class Test
    Shared Sub Main()
        Dim client As HelloClient = New HelloClient()
        ' Use the 'client' variable to call operations on the service.
        ' Always close the client.
        client.Close()
    End Sub
End Class

```

Otherwise please contact the Creatio support team.

- c. Check the system settings for the web leads (find it by the code „WebLead“, see the screenshot). If these settings are empty, fill them in with the Creatio’s administrator data (recommended).

System settings

NEW FOLDER ADD SETTING ACTIONS

Code: WebLead

Name	Code
User password for creating leads from third-party resources	WebLeadUserPassword
Username for registering leads from external resources	WebLeadUserName

OPEN COPY DELETE

2. Create a new Facebook application.

- a. [Open “Facebook developers” page](#) under your Facebook account and create a new application, do this by click on the “My Apps” item.

facebook for developers

Products Docs More My Apps

Facebook Developer Conference

F8 2018 keynotes and sessions on-demand now

Watch Here

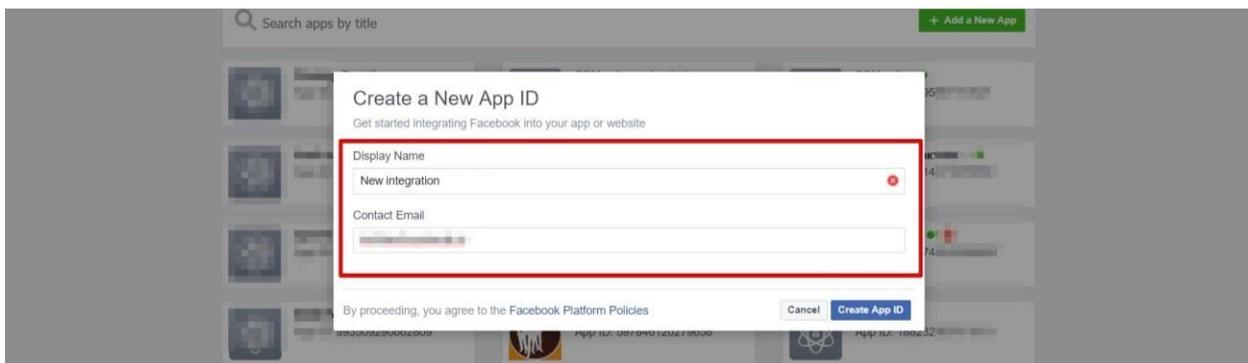
- b. On the opened page click on the “+ Add a New App” button (or choose this item in “My apps” menu):

facebook for developers Products Docs Tools & Support News Videos

Search apps by title

+ Add a New App

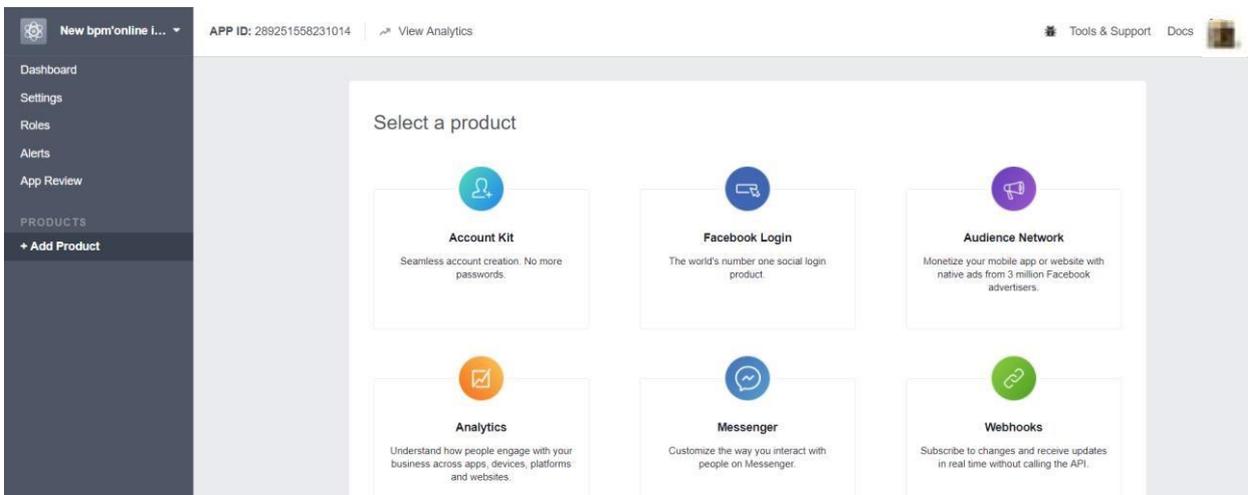
c. Please fill “Display Name” and “Contact Email” fields, then click on the “Create App ID” button:



d. Proceed to security check:



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

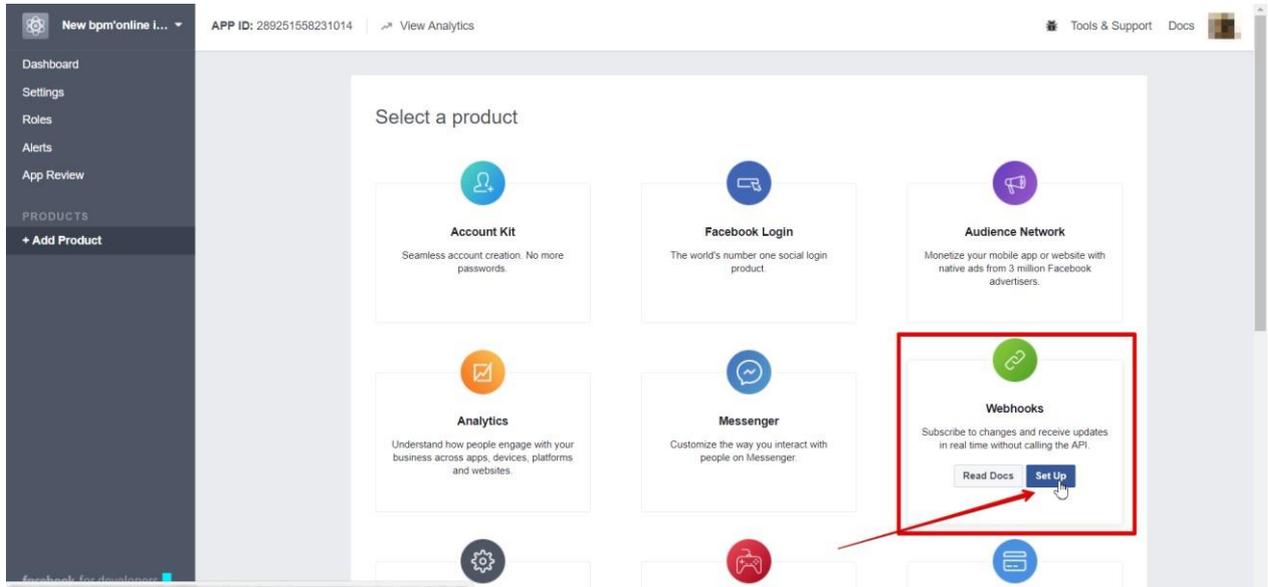


Now you have to customize your new Facebook application in order to integrate it with your Creatio application. Application Id (**APP ID in the left top corner of the page**) has to be copied to the “**Facebook form application Id**” system setting.

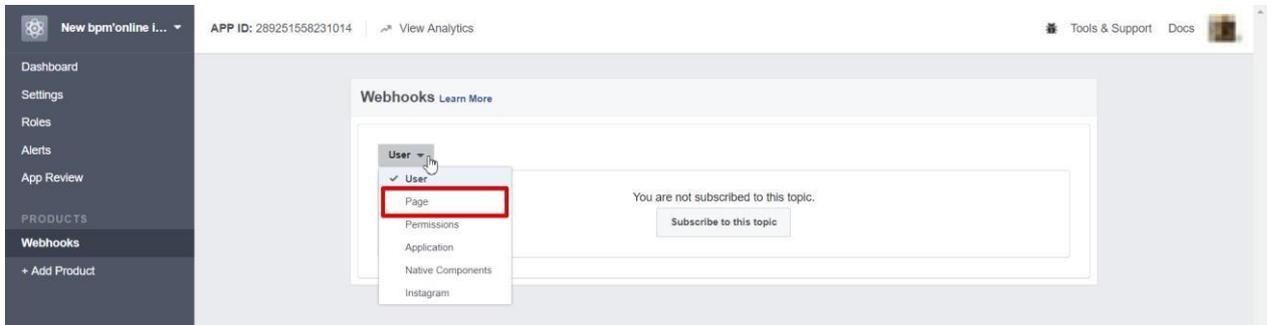
3. Facebook application customization

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.

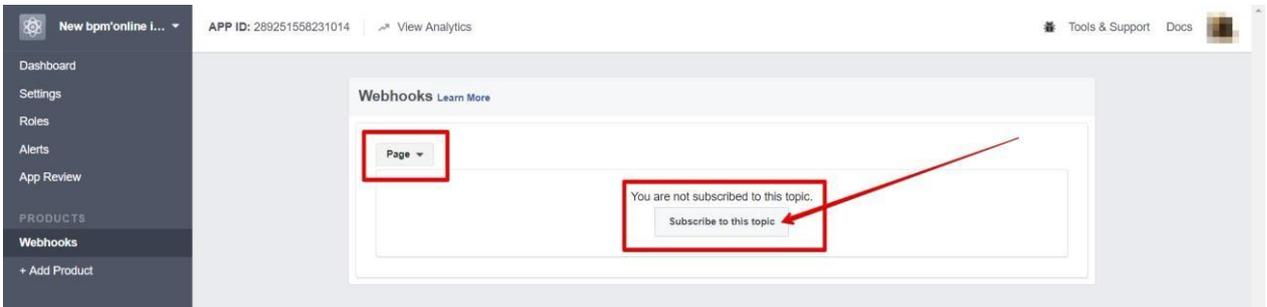
a. On the Facebook application settings page please click on the “**Webhooks**” option:



b. On the opened page please select “Page” item from the list:

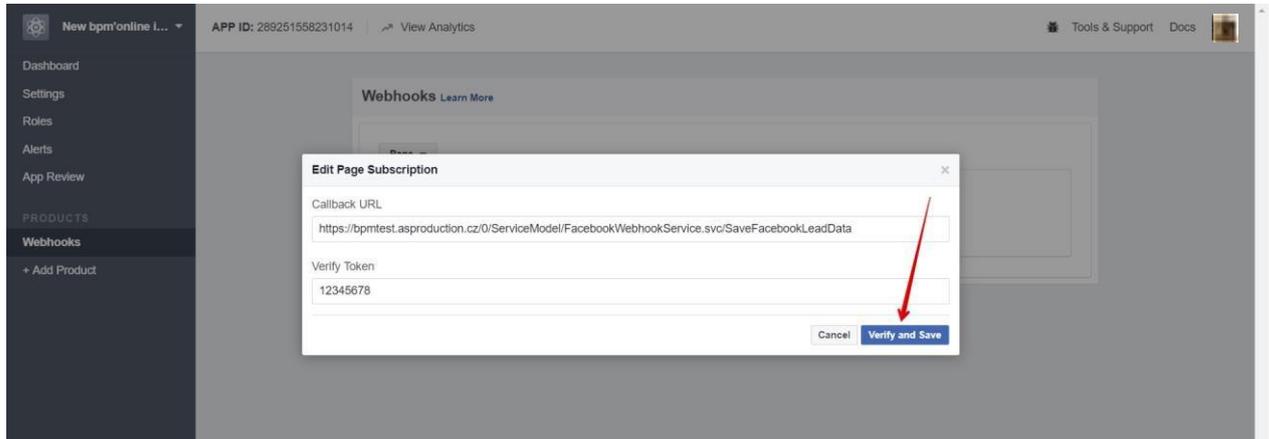


c. Then click on the “Subscribe to this topic” button:



d. 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**.

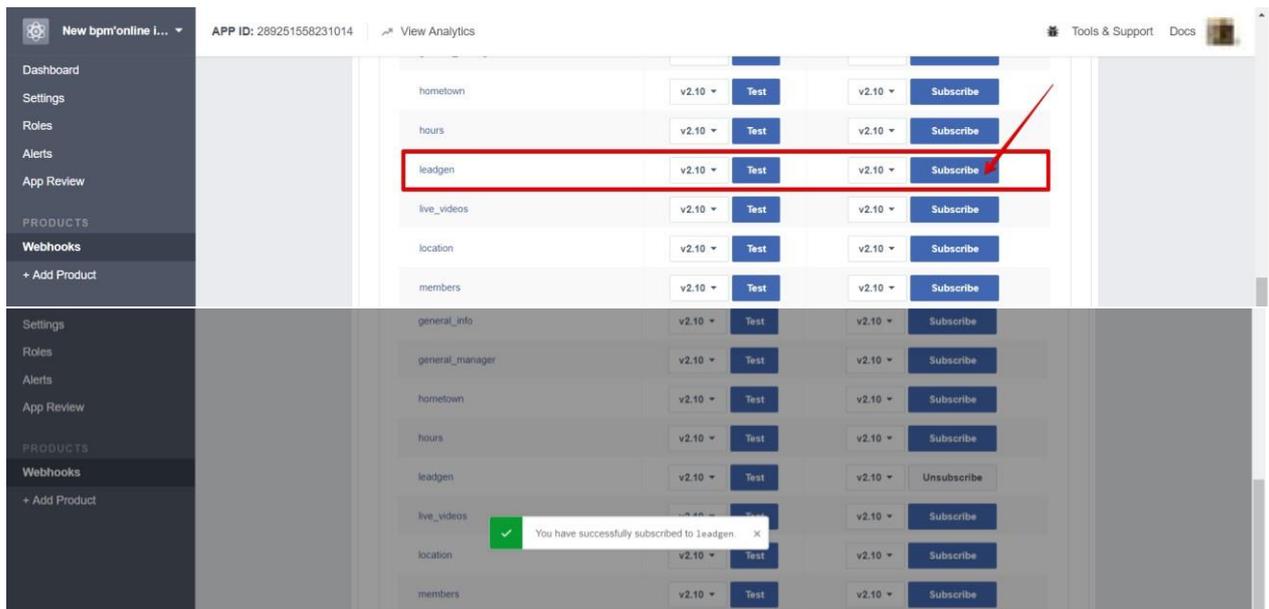
Then click on the “Verify and Save” button.



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).

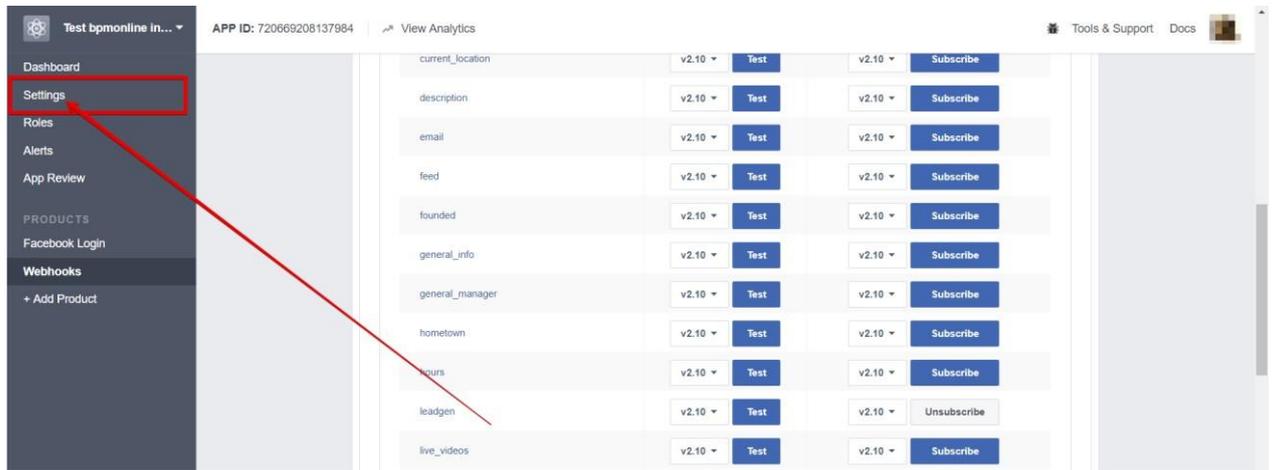
If you see information about the mistake, the problem may be in web server configuration or system settings for the web leads (see 1c of this manual). If you have a cloud version of Creatio please contact the Creatio support team and attach the description of the mistake on the page. If you have an on-premise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

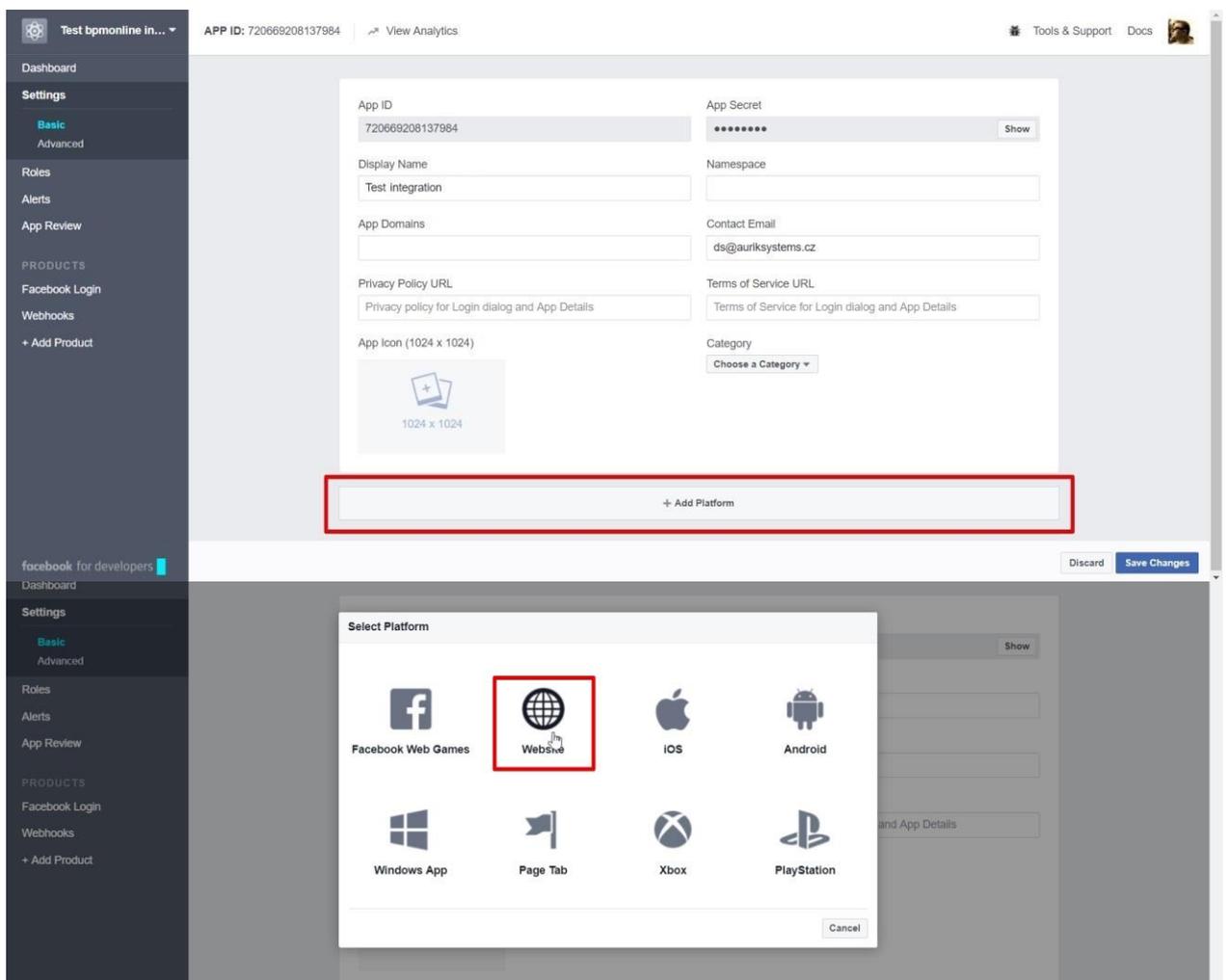


4. Application domain setting

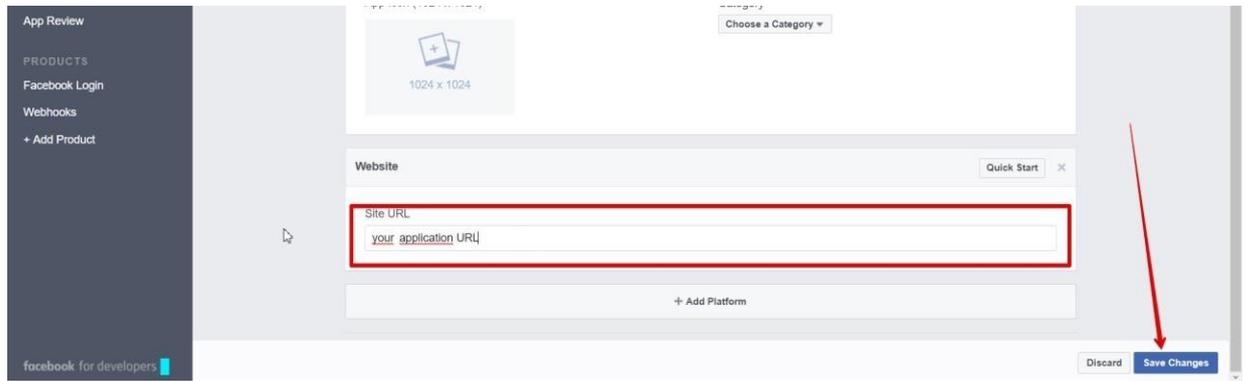
- a. On the Facebook application page open "Settings" page - Basic:



- 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):



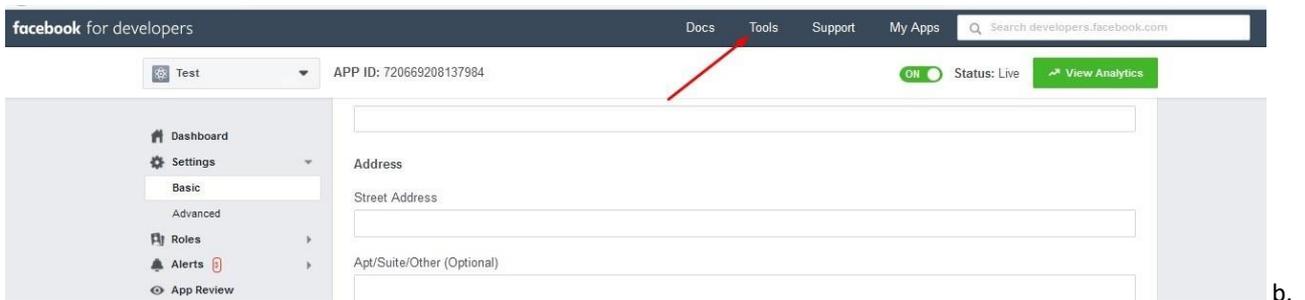
- c. Fill in the URL of your Creatio application and save settings.



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:



Please click on the “Access Token Tool” item:



Developer Tools



Graph API Explorer

Test, create, and authenticate API calls and debug responses.



Sharing Debugger

Preview how your content will look when it's shared to Facebook.



Access Token Debugger

See detailed info for an access token.

Other Developer Tools

Access Token Tool

Generate user and app access tokens for testing.

JS SDK Console

A testing environment for the Facebook SDK for Javascript.

Business Tools

Analytics

Ads Manager

Monetization Manager

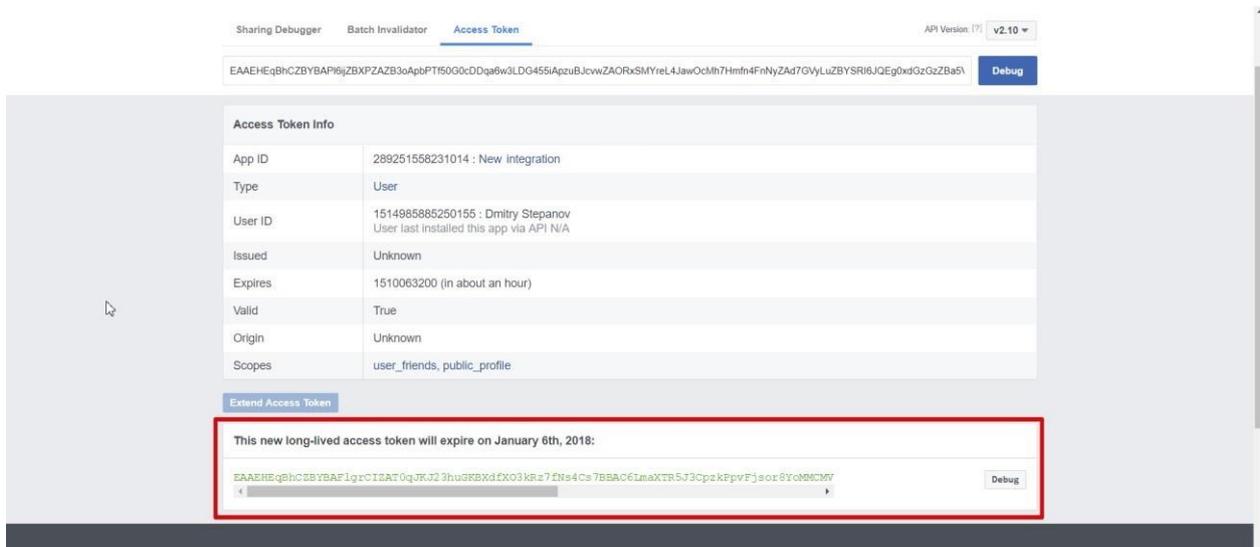
Business Manager

- 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.





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.



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 1st, 2018, need to be submitted for review by August the 1st, 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.

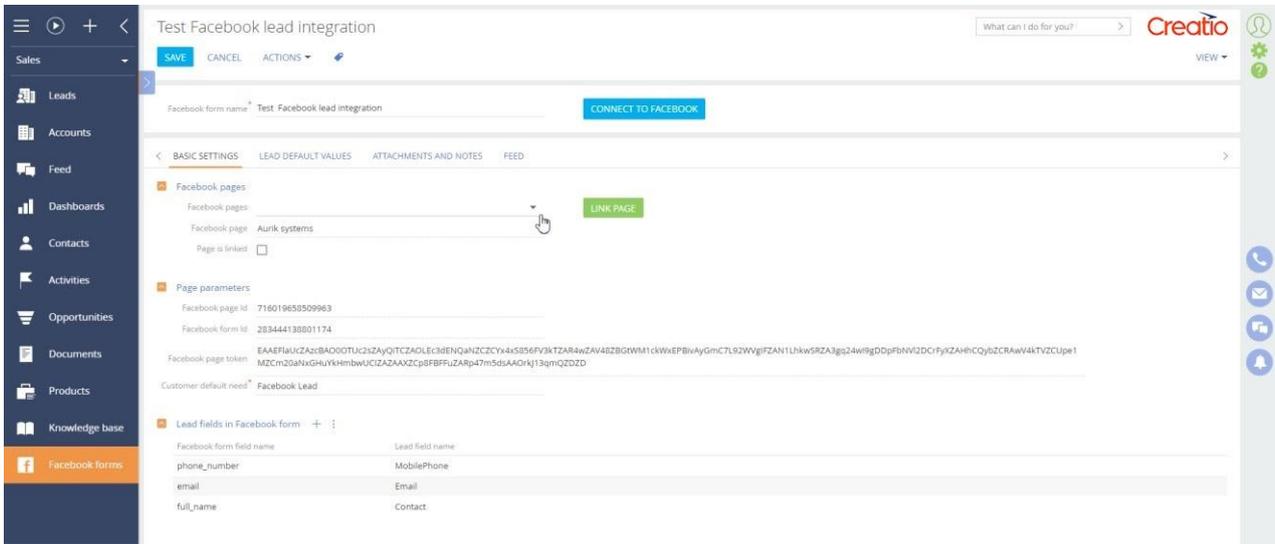
Section 2. Working with Facebook forms in the Creatio application

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).

1. Page description:



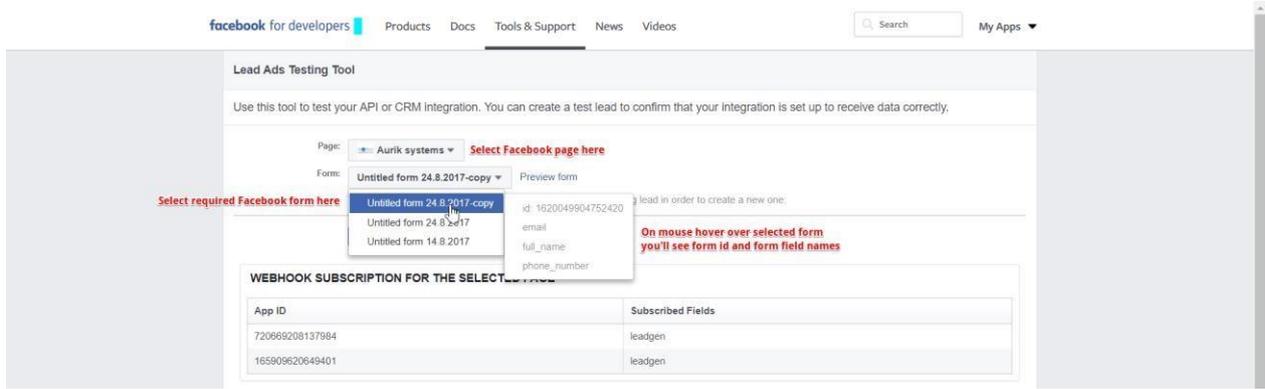
Field name	Field description
Facebook form name	The displayed Facebook form name
“Connect to Facebook” button	Performs a secure connection to Facebook, loads the list of the pages available for the logged user
Facebook pages	Contains the list of the available Facebook pages for the logged user. Please be noticed , 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 following link
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

- 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.

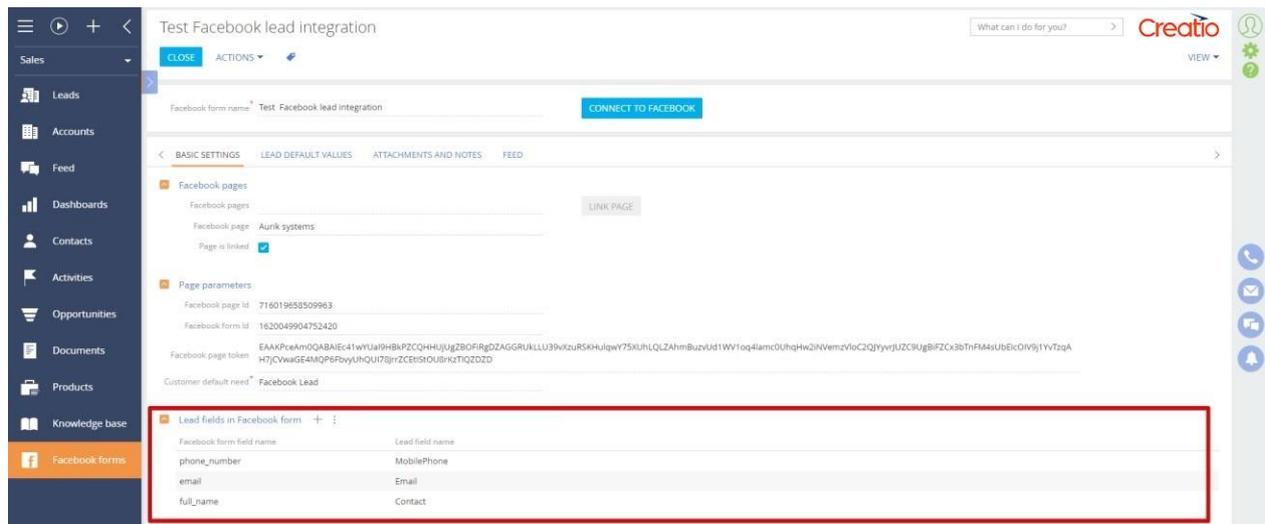
Please notice that all the following operations should be done under the same Facebook user account, which was used for User token Generation, otherwise you will get a security exception error.

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.

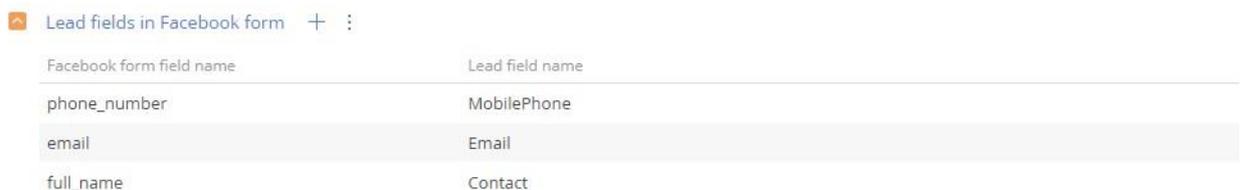
- Obtaining Facebook form Id and Facebook form fields mapping.** To select a specific form that is configured on the linked Facebook page, use using [lead testing tool provided by Facebook](#). Copy the Form Id and fill in the **“Facebook form Id”** field on the page.



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:



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



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

