

Install Hootsuite connector for Creatio

Streamline your social media customer service with the Hootsuite connector for Creatio. This powerful tool empowers you to leverage Hootsuite for superior customer engagement by:

Enriching customer profiles: Automatically add social interaction history to existing profiles and create new contacts for improved customer insights.

Generating cases: Effortlessly convert social media comments into Creatio cases, ensuring timely issue resolution.

Tailoring data processing: Harness the Creatio business process engine to customize data management based on your specific needs.

Install the app

To install the app, follow the instructions in Creatio documentation: [Install apps from the Marketplace](#).

Download the **Hootsuite connector for Creatio** app via the following link: <https://marketplace.creatio.com/app/hootsuite-connector-creatio>

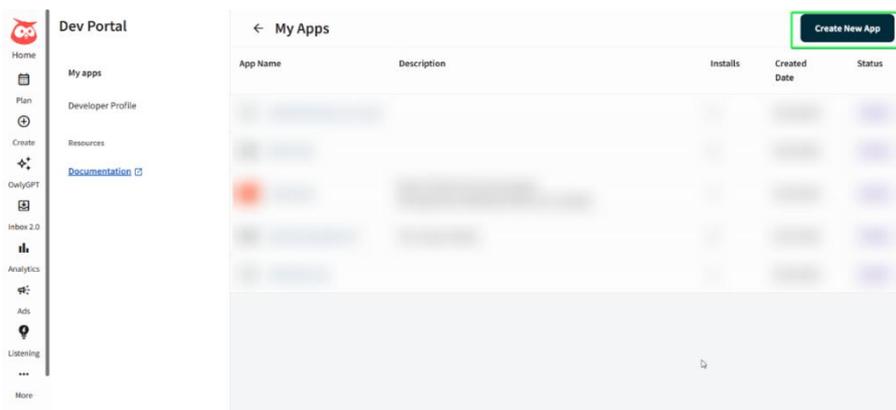
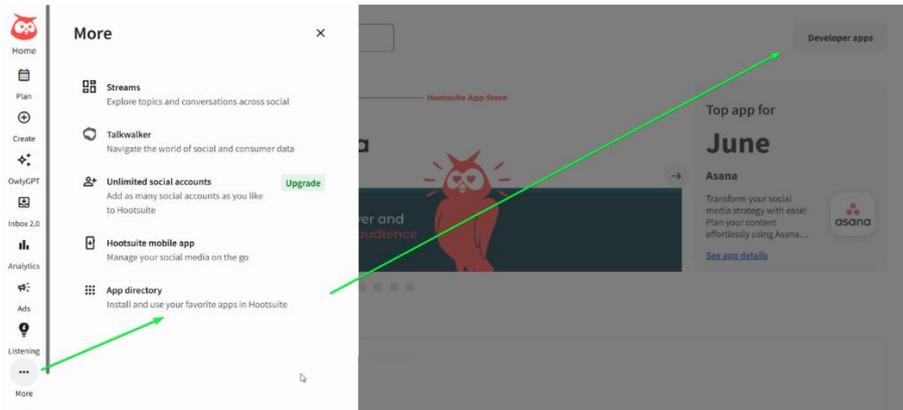
The app is compatible only with Freedom UI. To switch Creatio to Freedom UI, follow the instructions: [Turn on Freedom UI](#).

Set up the app

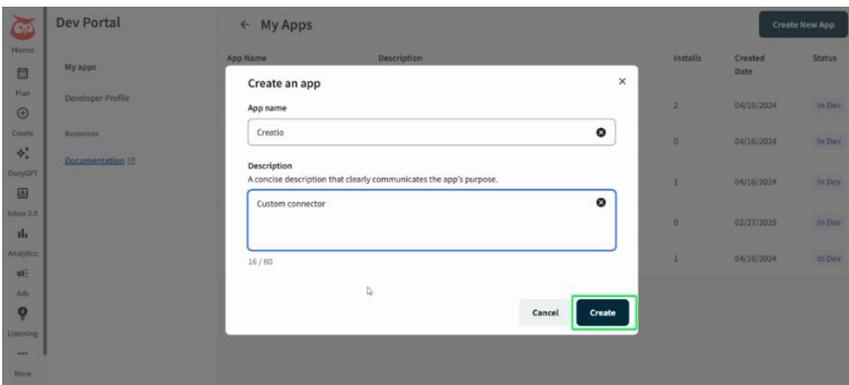
Note: The setup requires developer access in Hootsuite. Hootsuite verifies every developer.

To create an app:

1. Go to Hootsuite app directory → “Create New App”.

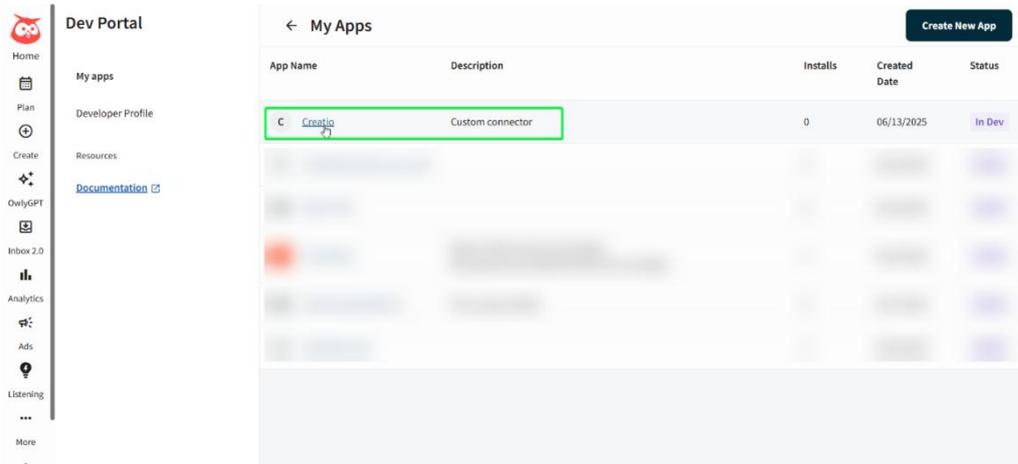


2. Fill out the following fields:
 - a. App Title, e.g, “My App Name”
 - b. Description, e.g, “My App Description”
3. Click “Create”.

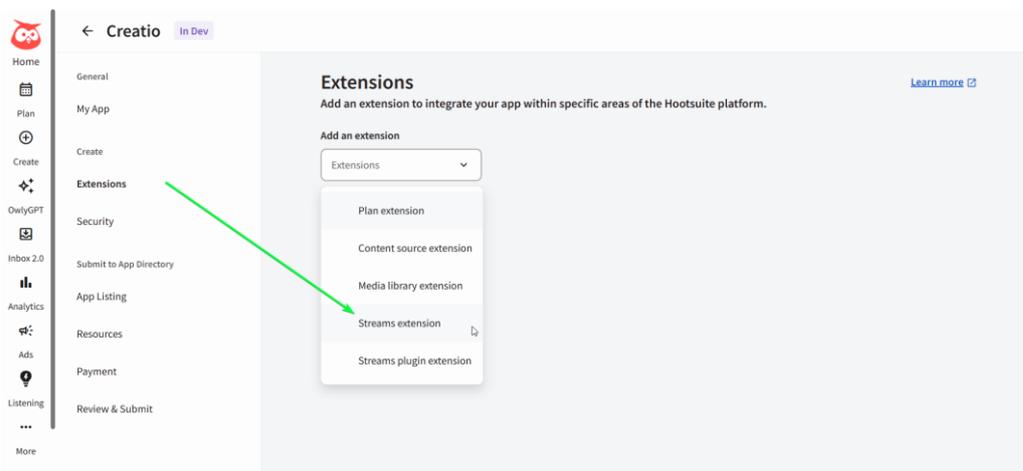


To create a plugin for your App in My Apps:

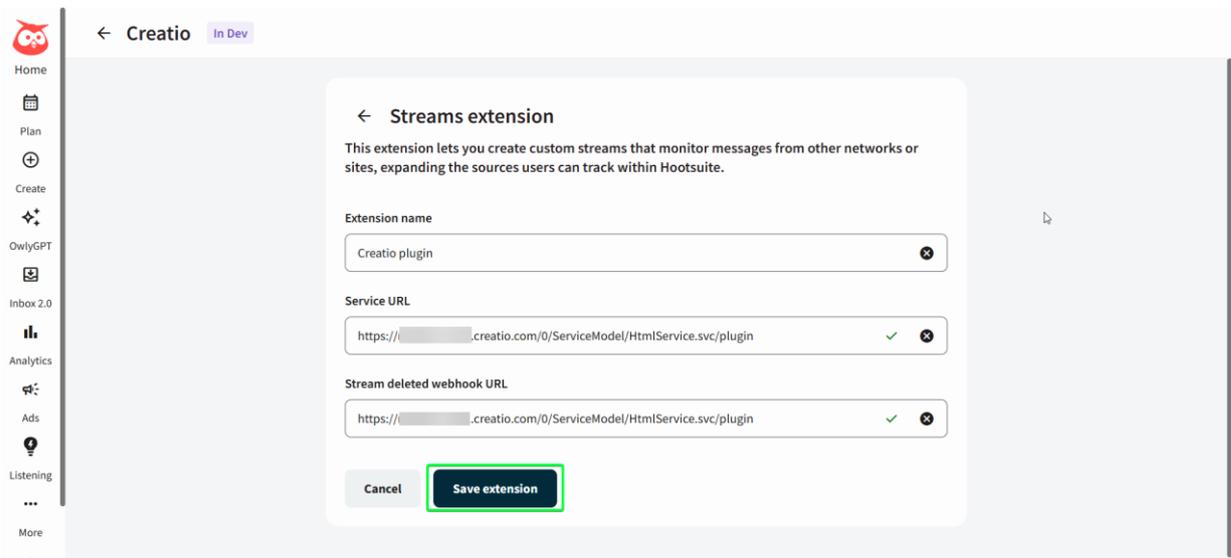
1. Click your app name.



2. Go to "Extensions" tab.
3. Select "Streams extension" in the "Add an extension" field.



4. Enter a title for your plugin in the "App Extension Title" field.
5. Specify the URL required to load your app plugin by typing it in the "Service URL" field (ex. <https://YourSiteURL/0/ServiceModel/HtmlService.svc/plugin>).
6. Specify the URL required to load your app plugin by typing it in the "Service URL" field (ex. <https://YourSiteURL/0/ServiceModel/HtmlService.svc/plugin>).
7. Click "Save extension".

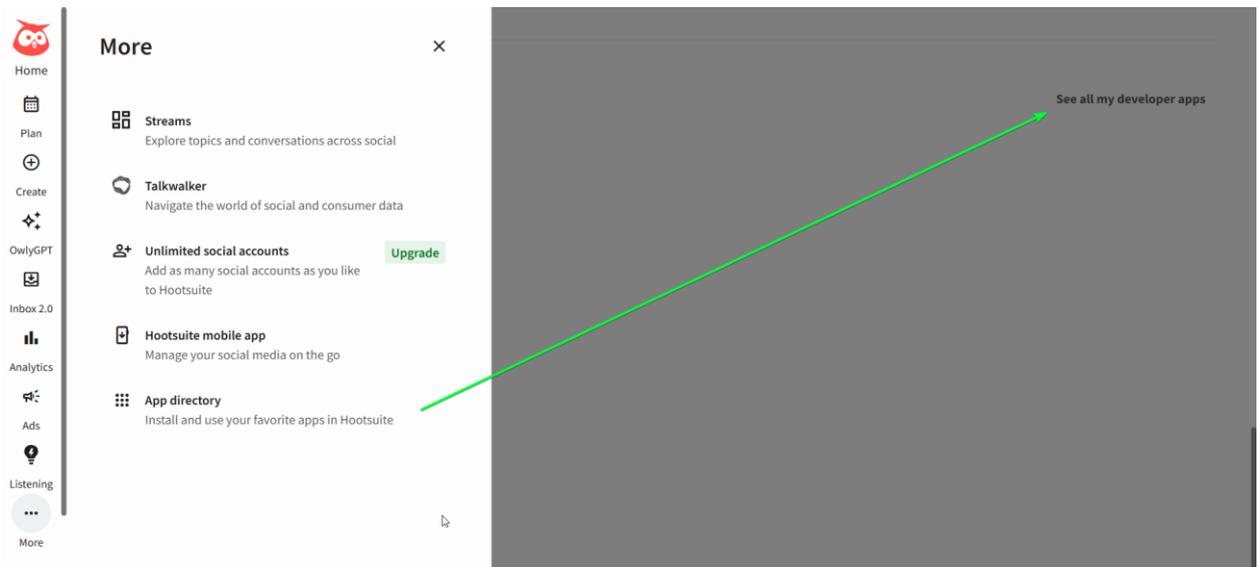


As a result, Hootsuite will create a stream plugin.

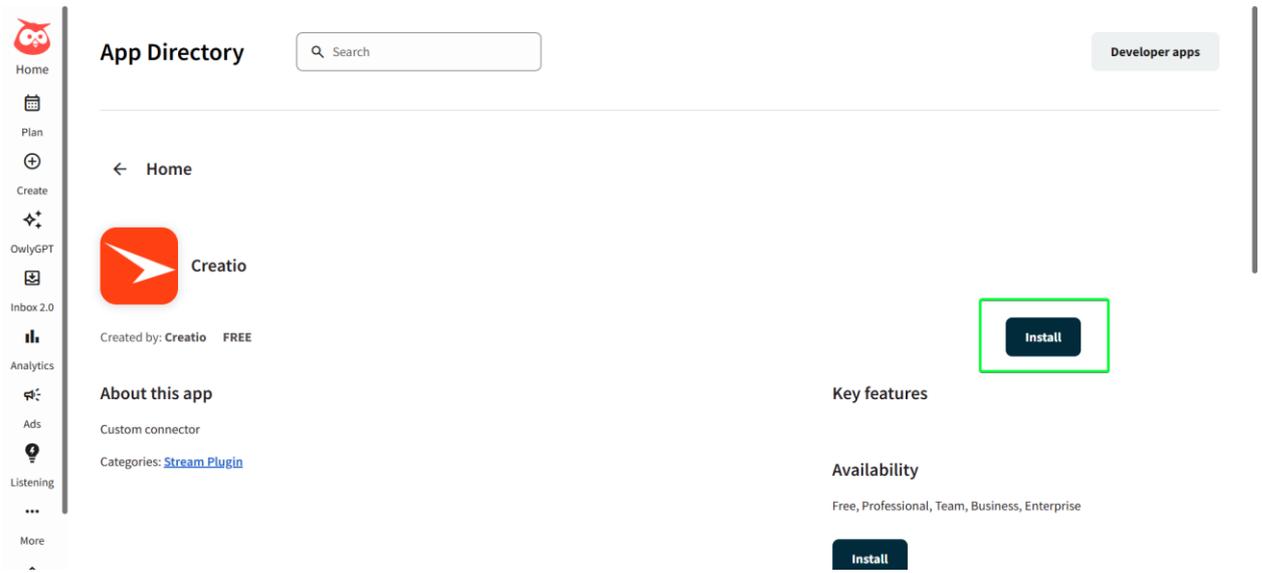
To install the app plugin

In your Hootsuite dashboard:

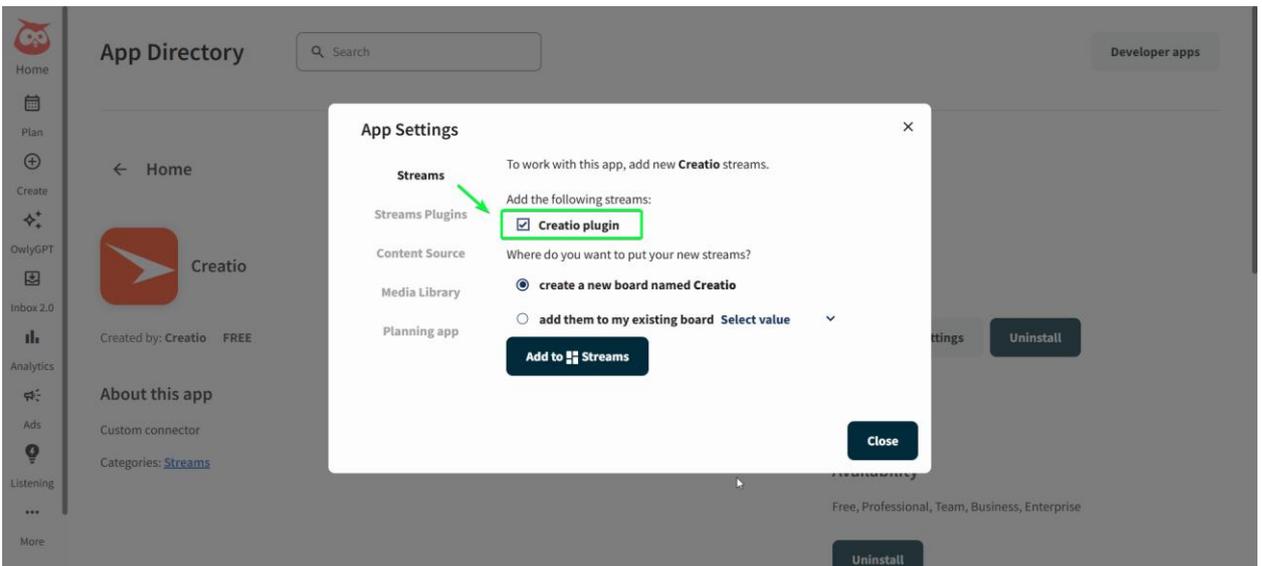
1. Go to Launch Bar → More → App Directory.
2. Click “See all my developer apps” at the bottom of the page.



3. Select created developer app.
4. Click Install next to your app name.



5. Look for the plugin you created earlier in the "Stream" tab and make it active. As a result, Hootsuite will install your plugin.



Proceed to setting up your Creatio environment. If you use Creatio in the cloud, send the following instructions to support@creatio.com. If you use Creatio on-site, take the steps manually:

1. Configure anonymous service.
 1. Register the custom web service
 - i. Go to the `..\Terrasoft.WebApp\ServiceModel` directory.
 - ii. Create a `HtmlService.svc` file and add the following record to it.


```
<% @ServiceHost Language="C#" Debug="true"
```

```
Service="MrktHootSuiteApp.WebService.HtmlService" %>
```

- iii. Enable both HTTP and HTTPS support. Open the ..\Terrasoft.WebApp\ServiceModel\http\services.config file and add the following record to it.

```
<service name="MrktHootSuiteApp.WebService.HtmlService">  
  <endpoint name="HtmlServiceEndPoint"  
    address=""  
    binding="webHttpBinding"  
    behaviorConfiguration="RestServiceBehavior"  
    bindingNamespace="http://Terrasoft.WebApp.ServiceModel"  
    contract="MrktHootSuiteApp.WebService.HtmlService" />  
</service>
```

- iv. Enable all users to access the custom web service that uses anonymous authentication.
 - a. Open the ..\Terrasoft.WebApp\Web.config file.
 - b. Add the element that defines the relative path and access permissions to the web service.

```
<location path="ServiceModel/HtmlService.svc">  
  <system.web>  
    <authorization>  
      <allow users="*" />  
    </authorization>  
  </system.web>  
</location>
```

- v. Add the relative web service path to the value attribute of the AllowedLocations key in the element:

```
<configuration>  
...  
  <appSettings>  
    ...  
    <add key="AllowedLocations" value="[Previous  
values];ServiceModel/HtmlService.svc"/>  
    ...  
  </appSettings>  
...  
</configuration>
```

2. Configure headers.

1. Update external Web.config (comment out X-Frame-Options and X-Content-Type-Options):

```
<httpProtocol>  
  <customHeaders>
```

```

<!-- <add name="X-Frame-Options" value="SAMEORIGIN" /> -->
<!-- <add name="X-Content-Type-Options" value="nosniff" /> -->
<remove name="X-Powered-By" />
<!--
X-Content-Type-Options:
https://developer.mozilla.org/en-US/docs/Web/HTTP/Headers/X-Content-
Type-Options
Cache-Control:
https://developer.mozilla.org/en-US/docs/Web/HTTP/Headers/Cache-Control
-->
<!--<add name="Cache-Control" value="no-cache, no-store, must-revalidate"
/>
<add name="Pragma" value="no-cache" />-->
</customHeaders>
</httpProtocol>

```

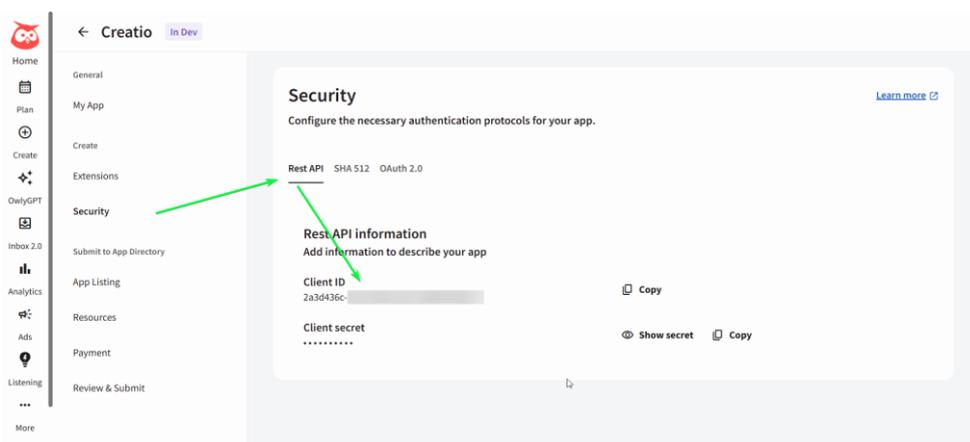
2. Check that "HTTP response headers" lookup has the following:

Header Name	Header value	Endpoint url	Request method
X-Frame-Options	SAMEORIGIN	*	*
X-Content-Type-Options	nosniff	*	*
X-Frame-Options	ALLOWALL	/ServiceModel/HtmlService.svc/modal	*
X-Frame-Options	ALLOWALL	/ServiceModel/HtmlService.svc/plugin	*

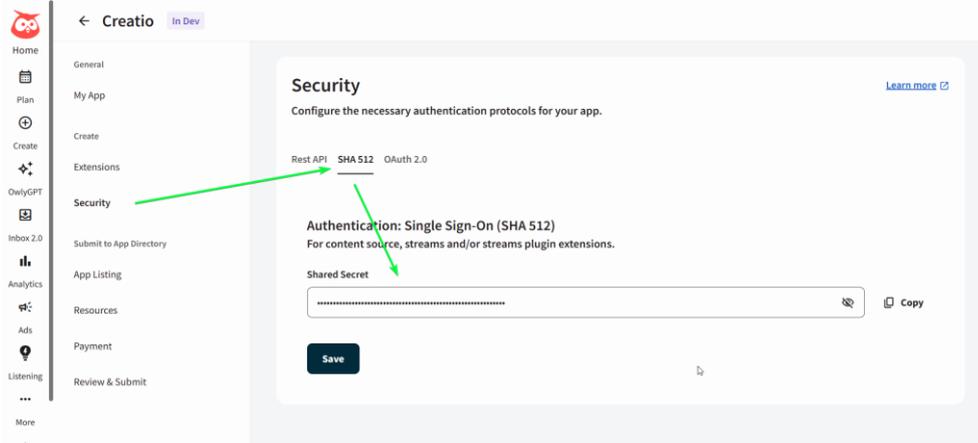
Note: This package does not provide data binding for "HTTP response headers" lookup. You need to add the records manually.

3. Fill out the following system settings in Creatio.
You will find necessary values in app settings ("Security" tab).

1. Hootsuite SDK key ("MrktHootsuiteSdkApiKey" code)



2. Hootsuite SSO password (“MrktHootsuiteSharedSecret” code)



This field is empty by default. You must generate an own token and save it in Hootsuite and Creatio.

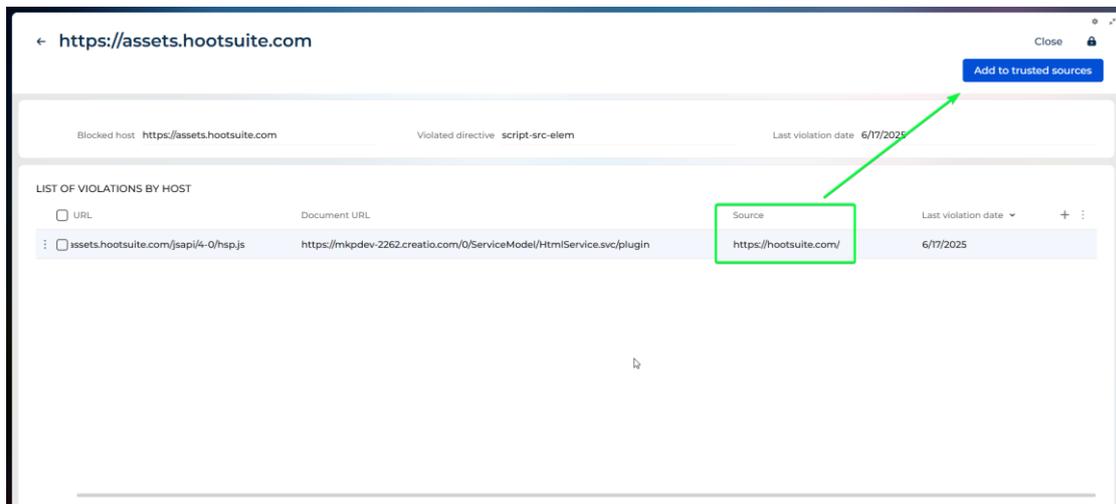
3. Hootsuite JWT secret (“MrktHootsuiteJwtSecret” code)

Required to verify queries from Hootsuite. Generate it using password randomizer. Must be 20 characters or longer.

4. Go to “System Designer” and open “Content Security Policy” section.

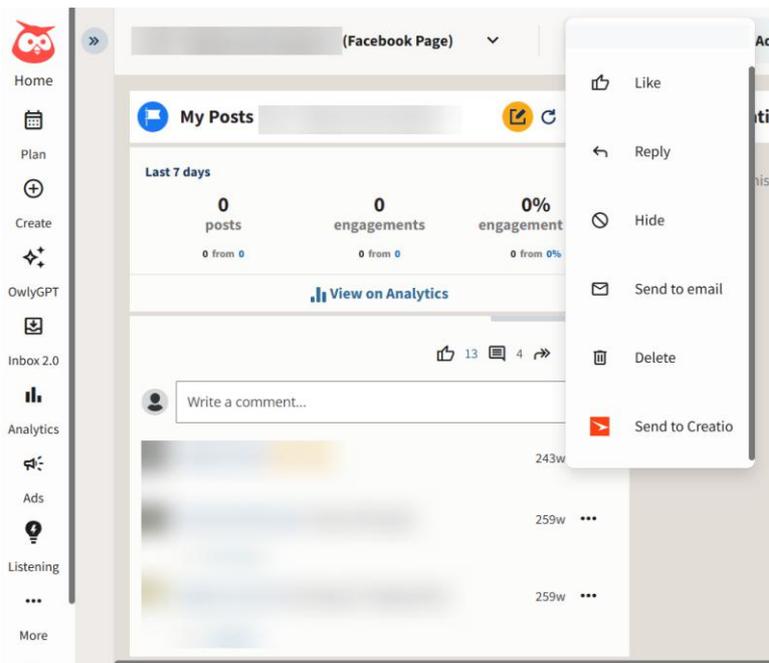
Find all records with source <https://hootsuite.com/> and add them to the trusted sources.

For example:



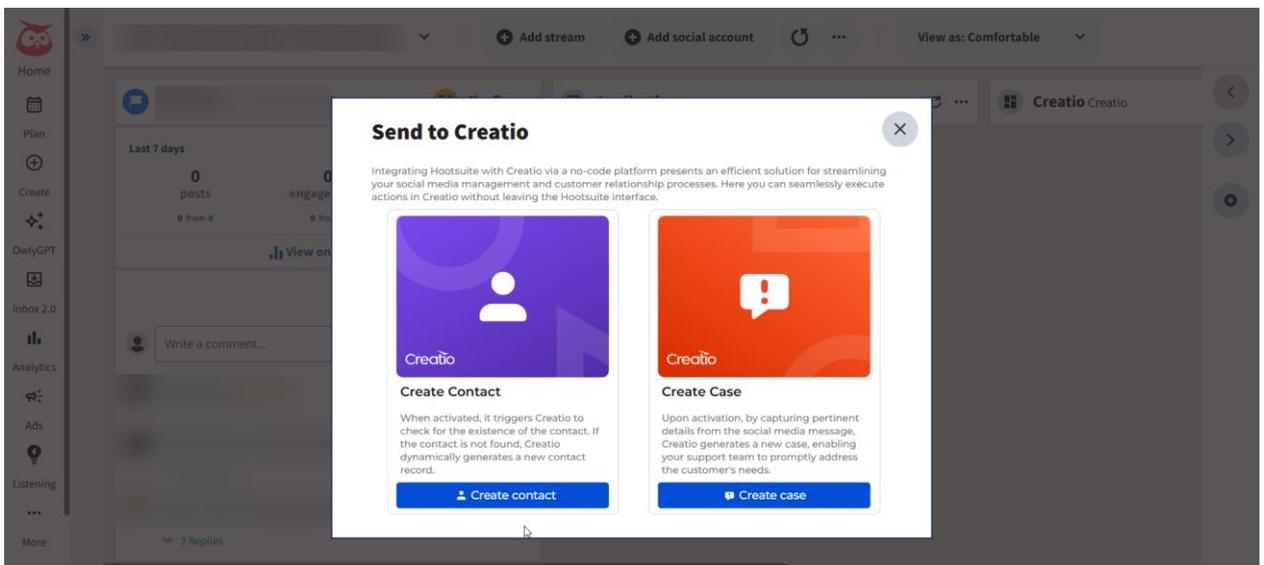
Note: The plugin button will be unavailable if Creatio instance is off.

Once setup on Hootsuite side is completed, you can send messages from any connected social network.



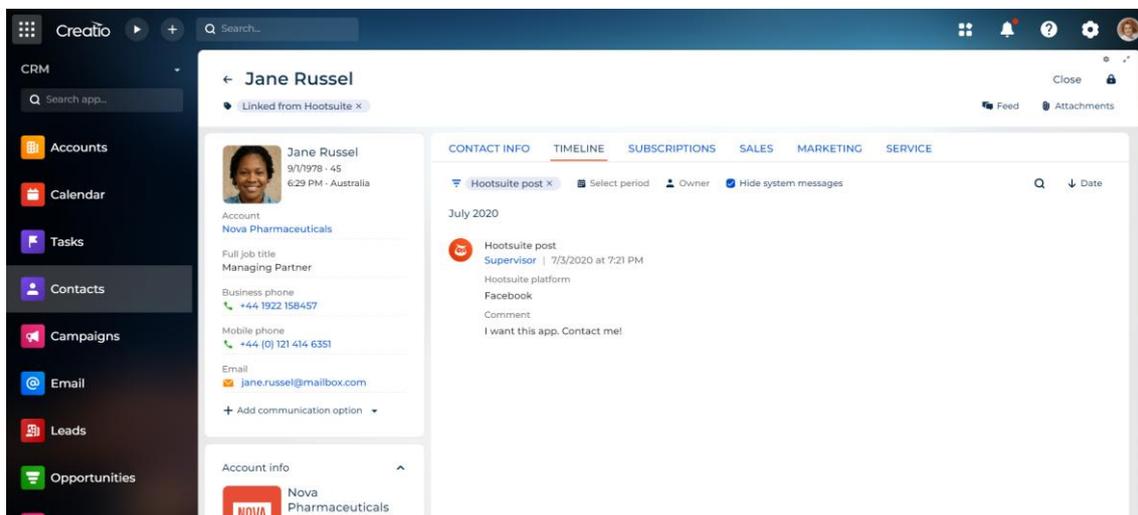
Create contact

1. Go to "Streams" Hootsuite dashboard. This is where you can see all your social media conversations.
2. Locate the message to create a contact.
3. Click "More actions" to the right of the message → "Send to Creatio."
4. Click "Create contact" to fill out the Contact form.



5. Edit the contact details if needed. The contact form will be pre-populated using some information from the social media profile:
 - a. Full Name: You can modify the pre-populated name based on your communication with the contact.
 - b. Language: Select the appropriate language from the available options.

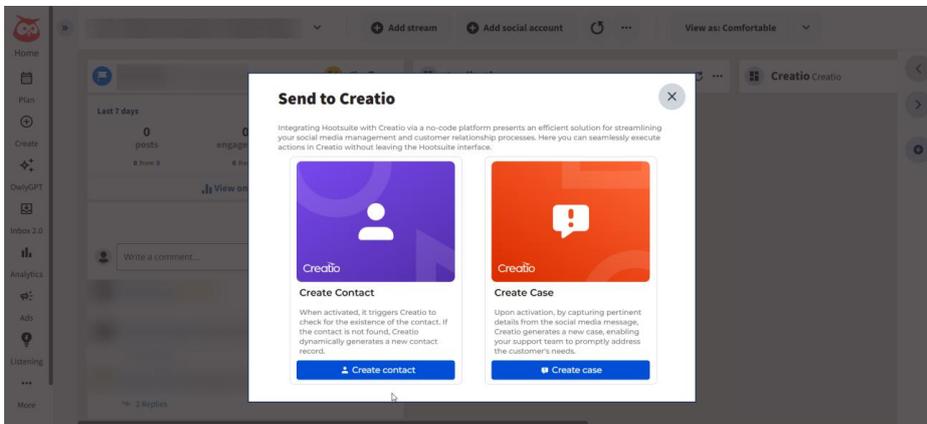
- c. Phone: Enter the contact's phone number (optional).
 - d. Email: Provide the contact's email address if available. Creatio will use this to search for existing contacts.
 - e. Address: Enter the contact's physical address (optional).
 - f. State/Province: Fill in the state or province associated with the address. Creatio will compare this with its internal "State" lookup for accuracy.
 - g. Website URL: Pre-populated using the URL from the social media profile.
 - h. Nickname: This field is pre-populated using the social media username and cannot be changed
6. Click "Save" to send the contact information to Creatio. Creatio will then run a business process "Hootsuite. Contact identification" to link the message to a new or existing contact record. The record will be tagged "Created from Hootsuite" for unique contacts or "Linked from Hootsuite" for existing contacts.



Note: Creatio does not overwrite any existing data in a linked contact using the information received from Hootsuite.

Create case

1. Go to the "Streams" Hootsuite dashboard.
2. Find the message to convert into a case.
3. Click "More actions" button to the right of the message → "Send to Creatio."



4. Select "Create case" to open the case form.
5. Enter essential details about the customer's issue in the case form:
 - a. Subject: Provide a clear and concise summary of the issue.
 - b. Description: Elaborate on the customer's concerns.
 - c. Email: Enter the customer's email address if available. Creatio will search for existing cases based on this information.
 - d. Priority: Select the appropriate priority level (Low, Medium, High, or Critical) from the drop-down menu. Custom priority values defined in Creatio are not available in Hootsuite.
6. Click "Save" to submit the case to Creatio.

Creatio will then execute a business process "Hootsuite. Create case". This process will link the message to a new case record in the timeline. The record will be tagged "Created from Hootsuite" for unique cases or "Potential duplicate" if the message ID already exists in another case.

