

Facebook lead generation

Set up automatic lead registration from social networks

Version 8.0



This documentation is provided under restrictions on use and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this documentation, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

Table of Contents

Set up automatic lead registration from social networks

4

Set up automatic lead registration from social networks

PRODUCTS: **MARKETING**

You can set up automatic lead registration in Creatio when a customer fills in a form on Facebook or Instagram. The setting is available for users with a preconfigured Facebook Ads Manager account.

Before you start setting up lead generation from social networks, make sure that the values of the following Creatio [system settings](#) are populated:

- “Identity server Url” (“IdentityServerUrl” code)
- “Identity server client id” (“IdentityServerClientId” code)
- “Identity server client secret” (“IdentityServerClientSecret” code)

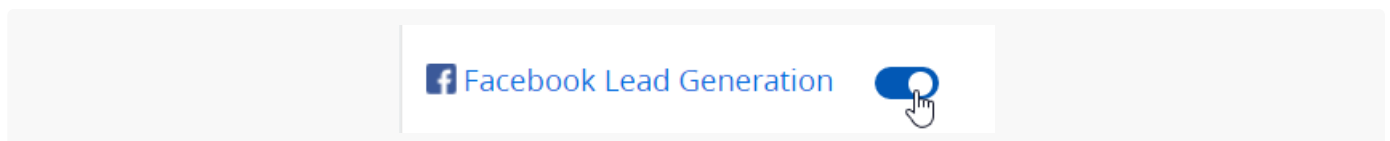
If the values of these settings are empty, contact Creatio support.

Attention. If you use Safari, make sure to allow pop-up windows for your Creatio instance.

To set up lead registration from social networks:

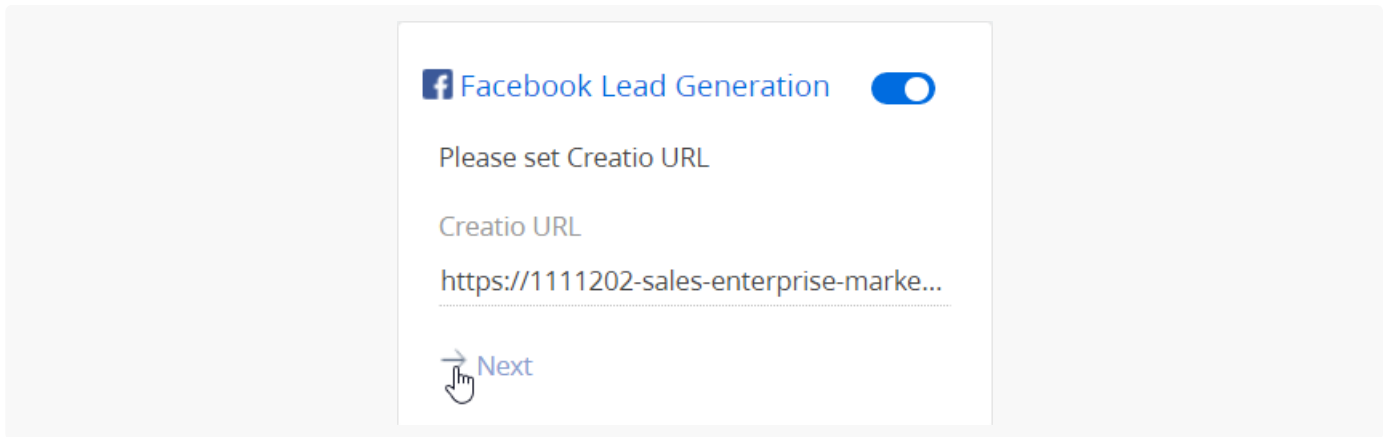
1. **Open** the [*Landing pages and web forms*] section.
2. **Click** [*New*] → [*Lead registration form*].
3. **Populate** the fields on the opened page:
 - a. [*Name*] - the record title that will display in the section list and the connected records;
 - b. [*Website domains*] - facebook.com.
4. **Save** the record.
5. Open the created record and **activate** the [*Facebook Lead Generation*] switcher.

Enabling Facebook lead generation



6. **Click** the [*Creatio URL setting*] link.
7. **Specify** your application URL in the [*Creatio URL*] field and click [*Next*].

Specifying Creatio URL



8. Click [*Select a source*].
9. If synchronization with social networks is **already configured** in Creatio, proceed with step 10 of the current guide.
If you are setting up lead registration from social networks **for the first time** and Creatio is not synchronized with any Facebook account yet, click [*Manage pages*].
 - a. **Log in** to Facebook. To ensure the correct setup, log in to your user account with administrator permissions to your Facebook public page and the “Ads manager” role.

Attention. After you set up the integration, do not degrade the administrator user permissions. This may cause issues with the functionality operation.

- b. **Select** one or several pages for setting up synchronization with Creatio. Click [*Next*].

Selecting a Facebook page to synchronize with Creatio

What Pages do you want to use with Creatio Social?

In the next step, you will determine what Creatio Social can do with the Pages you selected.

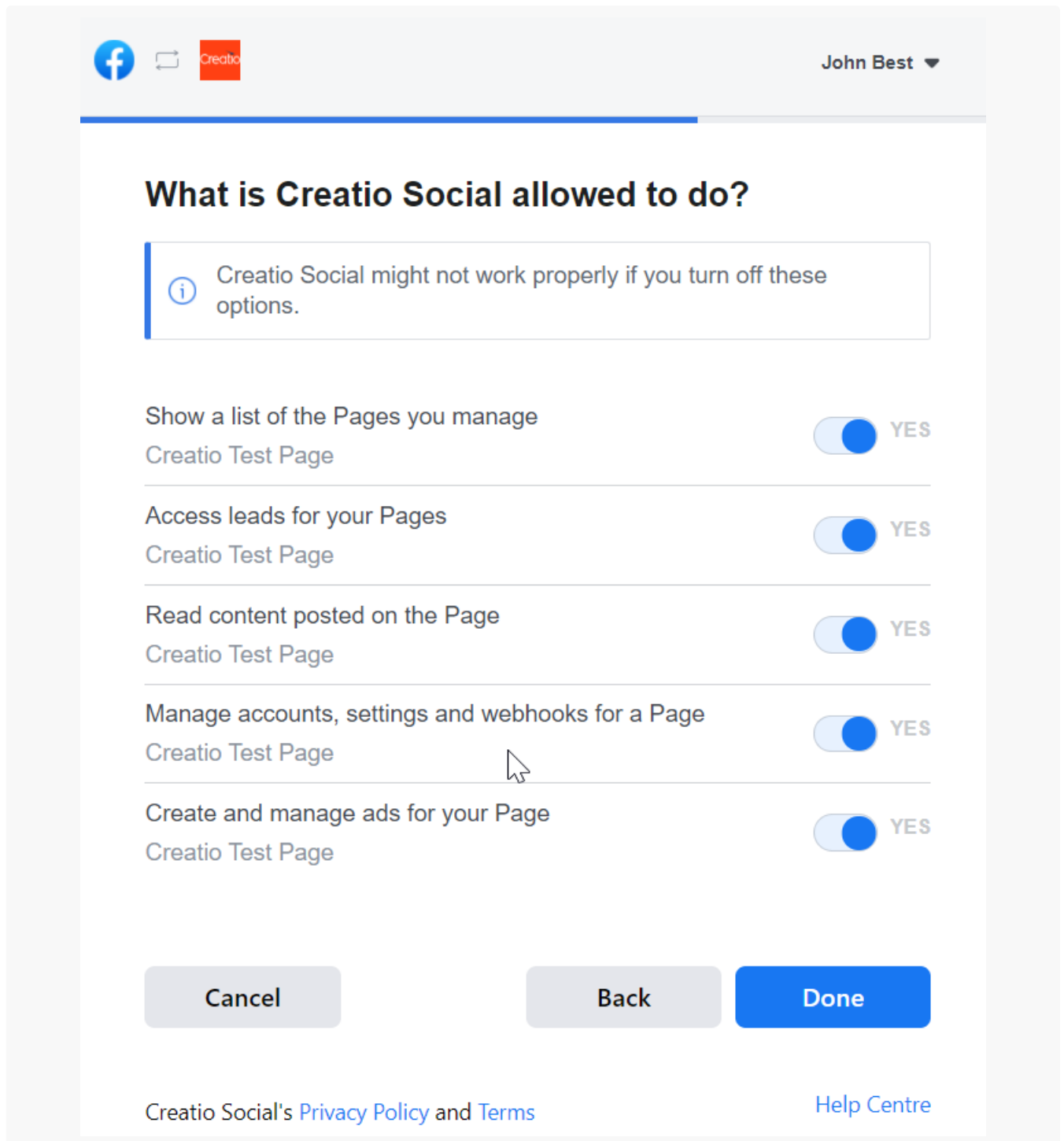
All Pages (1) Select All

A Our company

[Creatio Social's Privacy Policy and Terms](#) [Help Center](#)

- c. Permit Creatio to **manage your public page**. This will enable passing the data from social networks to Creatio. If you restrict Creatio from managing the page, lead registration may not work properly.

Setting up access to managing the page

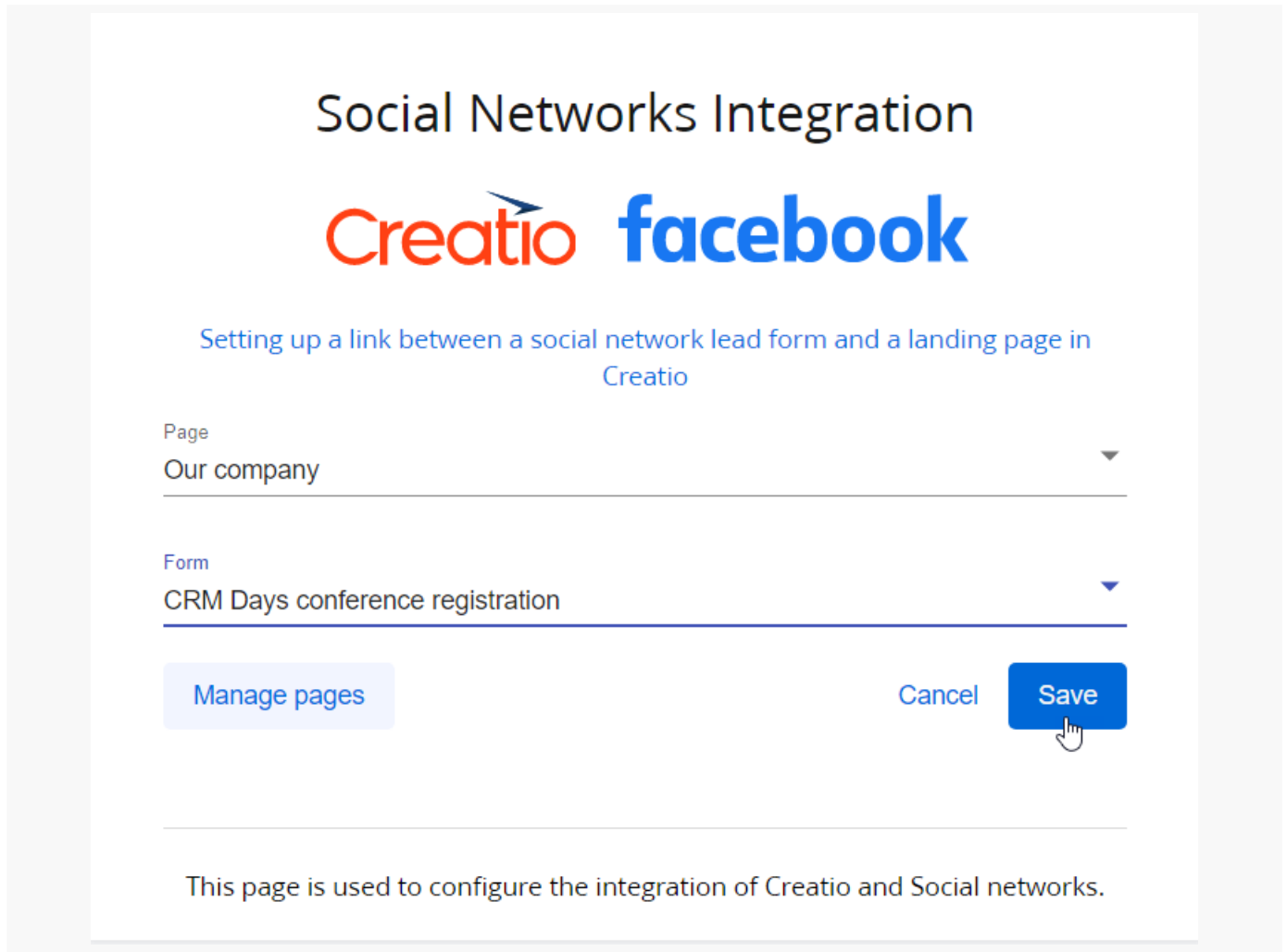


10. On the page of selecting a form, specify:

- The **Facebook page** with a configured campaign;
- Lead registration form** that has been created for this page in Ads Manager.

11. Click [Save].

Selecting a Facebook page and form to synchronize with Creatio



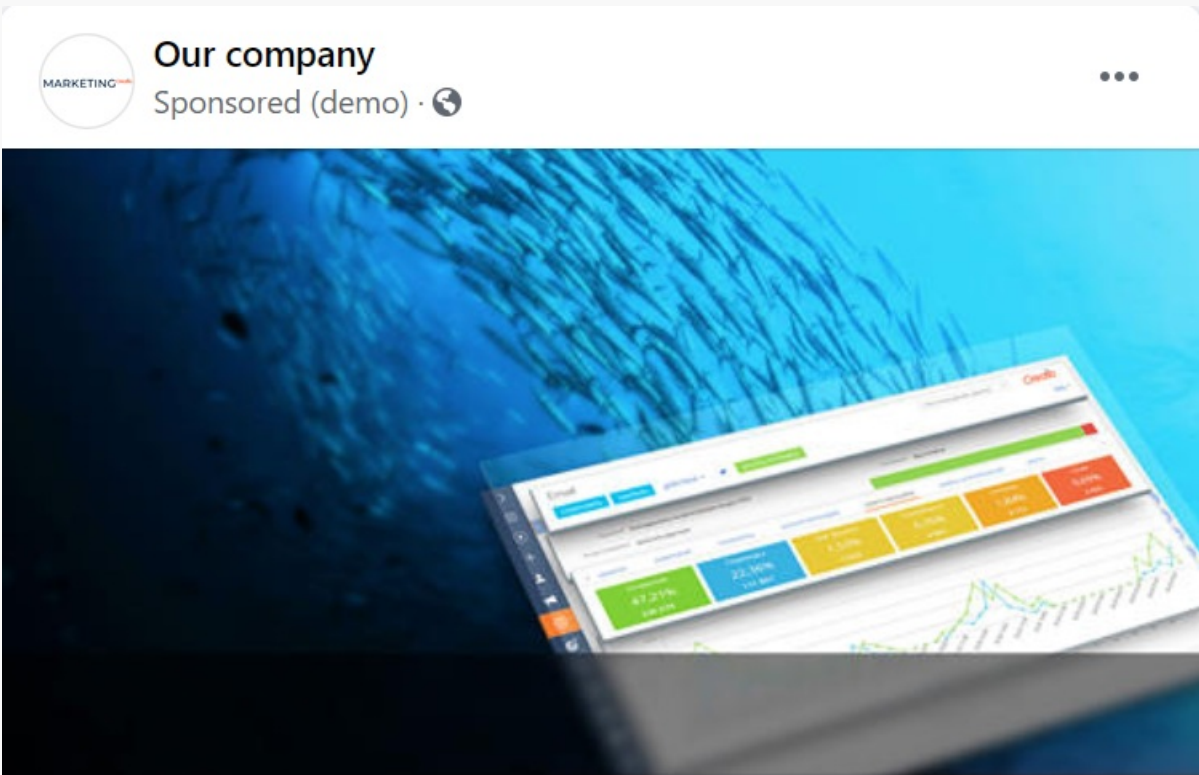
12. Close the setup window and return to the **landing page in Creatio**.

13. Refresh the page. As a result, the [*Facebook Lead Generation*] block will be populated with data from the synchronized Facebook page.

14. **Save** the landing record.

As a result, after the campaign is triggered in Facebook and Instagram, the ad record available for users will be connected to the form. Each time a form is submitted, a new lead will be added in Creatio.

Displaying an ad record with a lead registration form in the Facebook feed



Our company
Sponsored (demo) · 🌐

FORM ON FACEBOOK

Network CRM Day
Main meeting of CRM professionals

Sign Up

Like Comment

The following values can be passed to the leads added via social networks: email, phone number, address, city, region, country, postal code, full name, position, work phone, work email, account name. If you add other fields to the Facebook form, their values will be stored in the [*Notes*] detail. You can only pass text field values to Creatio due to restrictions on the Facebook side.

Note. If you change the default captions of the Facebook Ads Manager fields in the form, the field values may not be passed to Creatio properly.