

Facebook to CRM

From March 11 2011, Facebook fan pages can fully exploit iFrames in 'tabs'. Despite the tabs moving from the top the the left hand side, this new functionality provides great flexibility to Clicktools customer with many potential applications. 'Madlib' type forms to process information requests, raise cases/issues, event registration, weekly surveys, job applications, product suggestions. Clicktools could even be used to provide a custom Welcome page (without any questions at all!) or a jump page containing links to lots of other content... the list is almost endless.

This document outlines how Clicktools can be used with the new functionality in Facebook to provide custom 'tabs' within Facebook to feed information in to your CRM (Salesforce.com, Oracle, SugarCRM or from April, Microsoft Dynamics) like this:



You can see this example on Clicktools Facebook page at:

http://www.facebook.com/pages/Clicktools/191731155955?sk=app_158593864194887

Step 1: Build your content.

When building content for Facebook, there are several tips that you should be aware of:

- **Width must be limited to 520px.**
If you are using an advanced template and setting width, ensure your width does not exceed this or you will see unsightly tool bars. If you are using a basic template the Clicktools will ensure your content is contained within the allowed space.
- **Create a Thank you page to display on Exit**
The thank you page can just contain some text saying thank you but, as you are creating an app, you can also put in a 'Like' page (as in the example). You can get the necessary code for this at <http://developers.facebook.com/docs/reference/plugins/like/>. Copy the Code in to a Clicktools text element. Once you have created the Thank you page, copy the URL in to the 'Exit Page' setting for your actual content.

You may also want to put in the URL for the Content in to the Exit Page for the Thank you page so that people can refresh the form by clicking Submit on the Thank you page,

All other capabilities of Clicktools work as expected, including multi-page, same page conditions, and document upload.

Step 2: Get content URL

Once you have created your content, get the 'Shared URL' as this will form the basis of the integration in Facebook. The first thing you will need is the your Content URL from Clicktools. The URL is available from Clicktools 'Deployment' menu:

Survey URL (?)	http://web.clicktools.com/go	
Shared URL (?)	Yes ▾	Survey URL
Allow Answers on URL (?)	Yes ▾	

Shared URL must be set to 'Yes' and you can copy the link by clicking your right mouse button (Apple users CTRL+click) on [Survey URL](#) to copy the link.)

Paste this link somewhere (Notepad) as we will use it in a second.

Step 3. Set Up New App

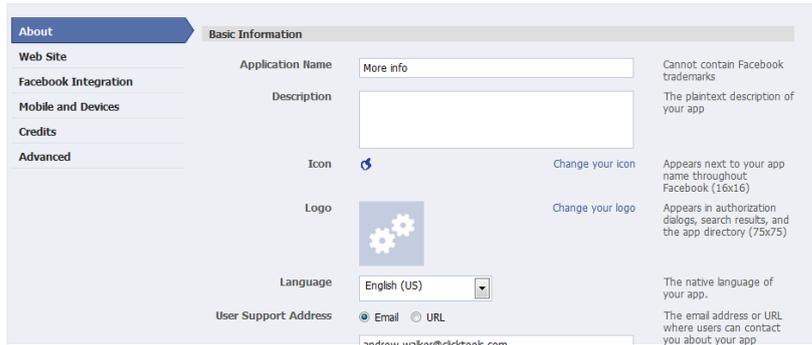
The next step is to add the app in Facebook. To do this you will need access to the Facebook developers app. If you don't have this, go to <http://facebook.com/developers> and 'Allow' access to your basic profile.



Once you have access, click the 'Set up New App' button (as shown on the left). This will ask for a name for your app and request you repeat a horrible captcha. If you manage to decipher and enter the unreadable text - Your app is now ready to setup.

There are lots of settings available, but I am going to describe the basic setup (which is about as far as we have got with the new facebook functionality!). We are only concerned with the 'About' and 'Facebook Integration' settings.

Step 4: About settings



For our purposes, the only important setting is the icon. If you don't have one, a standard 'cog' will be displayed but we recommend you use a favicon or other specially designed icon. This will be displayed alongside your App on the left hand side.

Step 5: Facebook Integration settings



The screenshot shows the Facebook Integration settings page. The 'Canvas' section contains the following fields and options:

- Canvas Page:** `http://apps.facebook.com/[]/`
- Canvas URL:** `http://web.clicktools.com/` (highlighted with a red box)
- Secure Canvas URL:** [Empty field]
- Canvas Type:** iFrame FBML (highlighted with a red box)
- iFrame Size:** Show scrollbars Auto-resize (highlighted with a red box)
- Bookmark URL:** [Empty field]

The 'Page Tabs' section contains the following fields and options:

- Tab Name:** More info (highlighted with a red box)
- Page Tab Type:** iFrame FBML (highlighted with a red box)
- Tab URL:** `http://apps.facebook.com/[CANVAS_URL]/go?w=3912e9aec` (highlighted with a red box)
- Edit URL:** [Empty field]

At the bottom of the page, there is a 'Save Changes' button.

Canvas URL
Paste the whole content URL copied from Clicktools and 'Cut' the final part (everything after the last '/').

Canvas Type
Set to iFrame

iFrame Size
Set to Auto-resize

Tab Name
Enter your title

Page Tab Type
Select iFrame

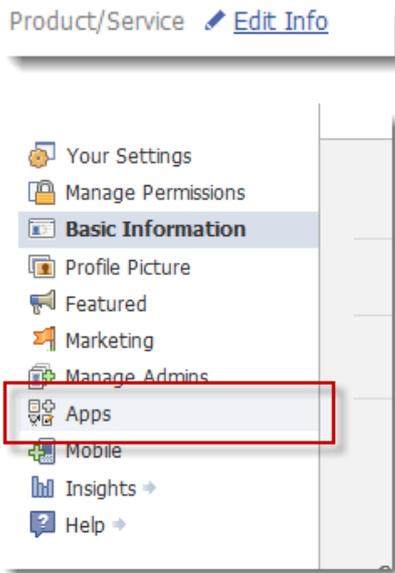
Tab URL
Paste the final part of the Clicktools link 'Cut' earlier (everything after the final '/')

Click Save Changes

Step 6: Add App to Fan Page(s)

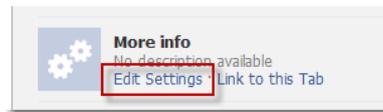
Before I start this, I understand you are 'supposed' to be able to add an App to more than one page at a time through the 'Application Profile Page' available against the App but I can't get this to work and this action simply creates a new fan page (I am unsure whether this is since the Facebook changes or whether I am just being an idiot).

As an alternative go to your Fan Page and:



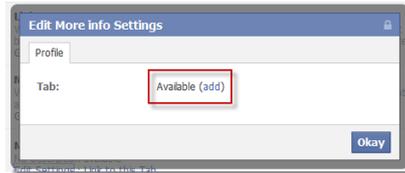
Click on Edit Info for the required page.

From the resulting additional menus that become available on the right hand side, Click on the 'Apps' menu.



From there, find your App (it is only here that you realize putting a description in may have helped

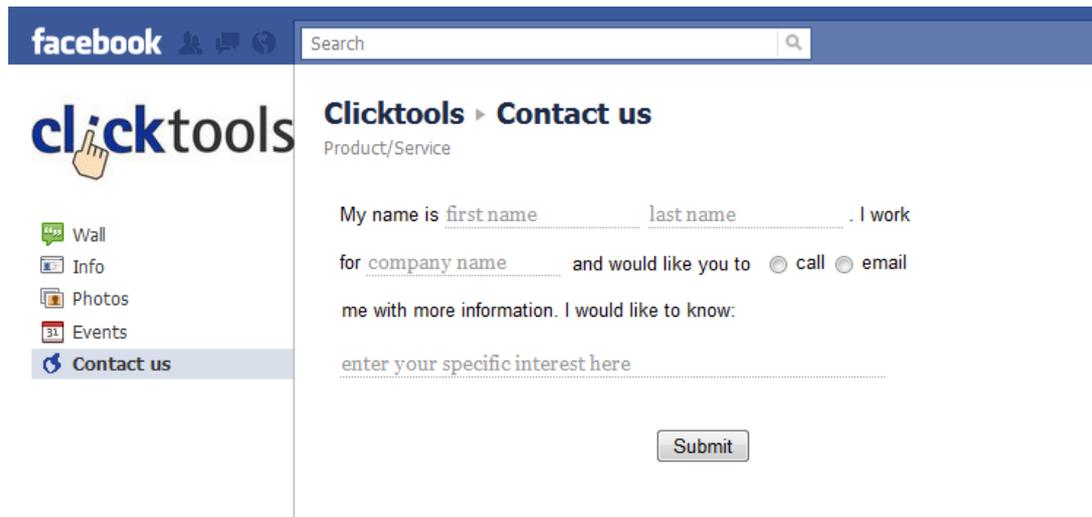
☺) and click on 'Edit Settings'.



Click on 'Add'. The window will change and allow you to put in a different tab name (if required). Click **Okay**.

Step 7: View your fan page with new tab

The new 'tab' will have been added to the list on the left hand side and when clicked, the form will appear...



That's it. You now have your form working with Facebook.