

Facebook Lead Integration with CRM – Implementation Guide

This document provides step-by-step instructions for integrating Facebook online leads into your CRM system. The integration allows seamless lead capture from Facebook Lead Ads directly into the CRM, enabling efficient lead management and faster response times.

Step 1: File Integration

To begin the integration process, necessary files must be transferred to your CRM directory.

Instructions:

1. **Locate the `online_lead` folder** from the uploaded Facebook lead integration script package.
2. **Copy** the entire `online_lead` folder.
3. **Paste** it into the target CRM directory, specifically within the `view` folder of your CRM project.

 *This folder contains essential scripts required for syncing Facebook leads with your CRM interface.*

Step 2: Database Configuration

You need to modify your CRM's database to store Facebook lead data effectively.

Instructions:

Run the following SQL queries in your CRM database. These queries add necessary fields and create a new table to store page and form details associated with Facebook leads.

-- Extend enquiry_master table to store Facebook lead data

```
ALTER TABLE enquiry_master
```

```
ADD COLUMN lead_id INT,
```

```
ADD COLUMN page_id INT,
```

```
ADD COLUMN form_id INT;
```

Facebook Lead Integration with CRM – Implementation Guide

-- Create a new table for managing Facebook pages and forms

```
CREATE TABLE facebook_pages (  
    id INT PRIMARY KEY AUTO_INCREMENT,  
    user_id INT NOT NULL,  
    page_id INT NOT NULL,  
    page_name VARCHAR(255),  
    form_id INT,  
    form_name VARCHAR(255),  
    created_at DATETIME DEFAULT CURRENT_TIMESTAMP,  
    updated_at DATETIME DEFAULT CURRENT_TIMESTAMP ON UPDATE CURRENT_TIMESTAMP  
);
```

-- Add Facebook access token column in roles table for authentication

```
ALTER TABLE roles  
ADD COLUMN fb_access_token LONGTEXT;
```

Explanation:

- `lead_id`, `page_id`, and `form_id` fields in `enquiry_master` help link CRM inquiries with Facebook lead details.
- The `facebook_pages` table stores metadata about connected Facebook pages and lead forms.
- `fb_access_token` in the `roles` table enables secure communication between Facebook and the CRM.

⚠ Important: Always backup your database before executing these queries.

Facebook Lead Integration with CRM – Implementation Guide

Step 3: Configuration in Code (Final Step)

After placing the `online_lead` folder, you need to configure the integration settings in the codebase.

Instructions:

1. Navigate inside the `online_lead` folder.
2. Open the subfolder named `facebook`.
3. Locate and open the file: `constant.php`.

In `constant.php`, update the following values:

Update the CRM Base URL


Replace the base URL with the correct path of your CRM instance:

```
define('BASEURL', 'https://clientdomain.com/demo-6/crm/'); // Change this to  
your CRM's URL
```




Update Database Connection Details

Replace the existing values with the database credentials for your CRM:

```
$host = "localhost";  
$username = "username";  
$password = "password";  
$db_name = "database_name";
```

 *Ensure these credentials are accurate and secure. Incorrect settings will prevent the integration from connecting to the database.*

Post-Integration Checklist

-  `online_lead` folder is correctly placed in the CRM's view directory.
 -  Database queries executed successfully.
 -  `constant.php` configured with accurate base URL and database details.
-