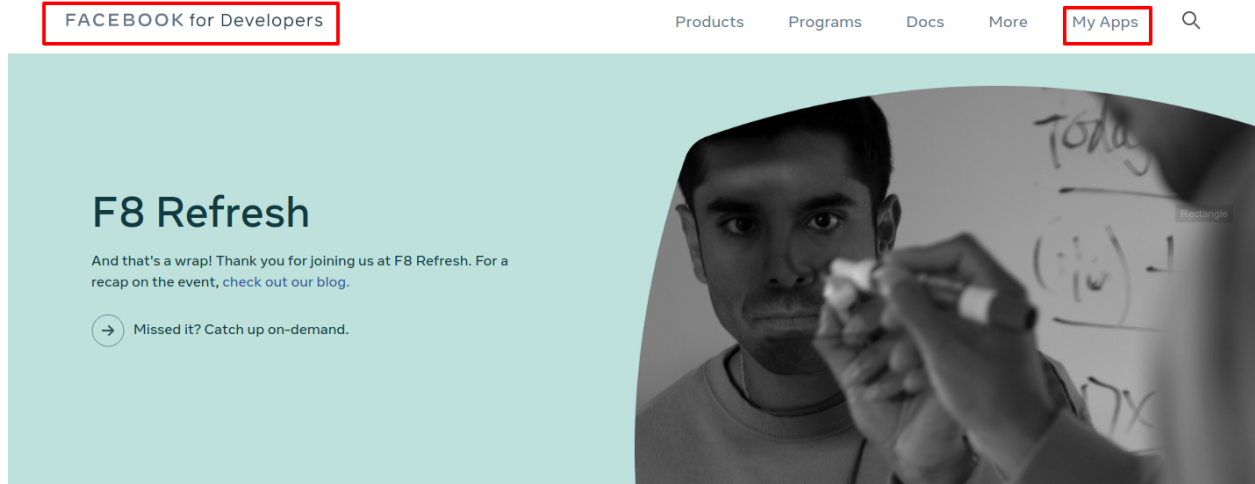# Pragtech CRM Facebook Leads
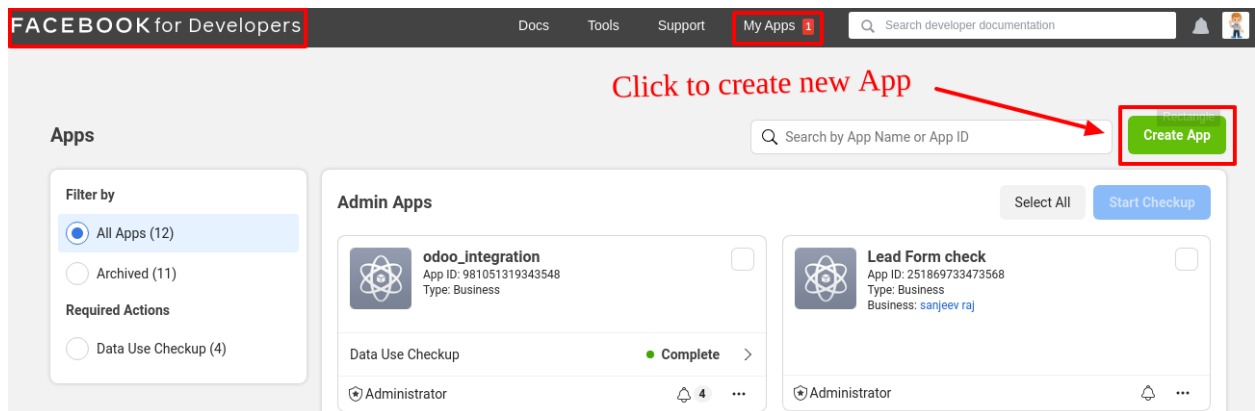
Facebook Developer Account Interface :-

Step 1 : First we have to login into the "Facebook Developer Account" using the following link https://developers.facebook.com/.
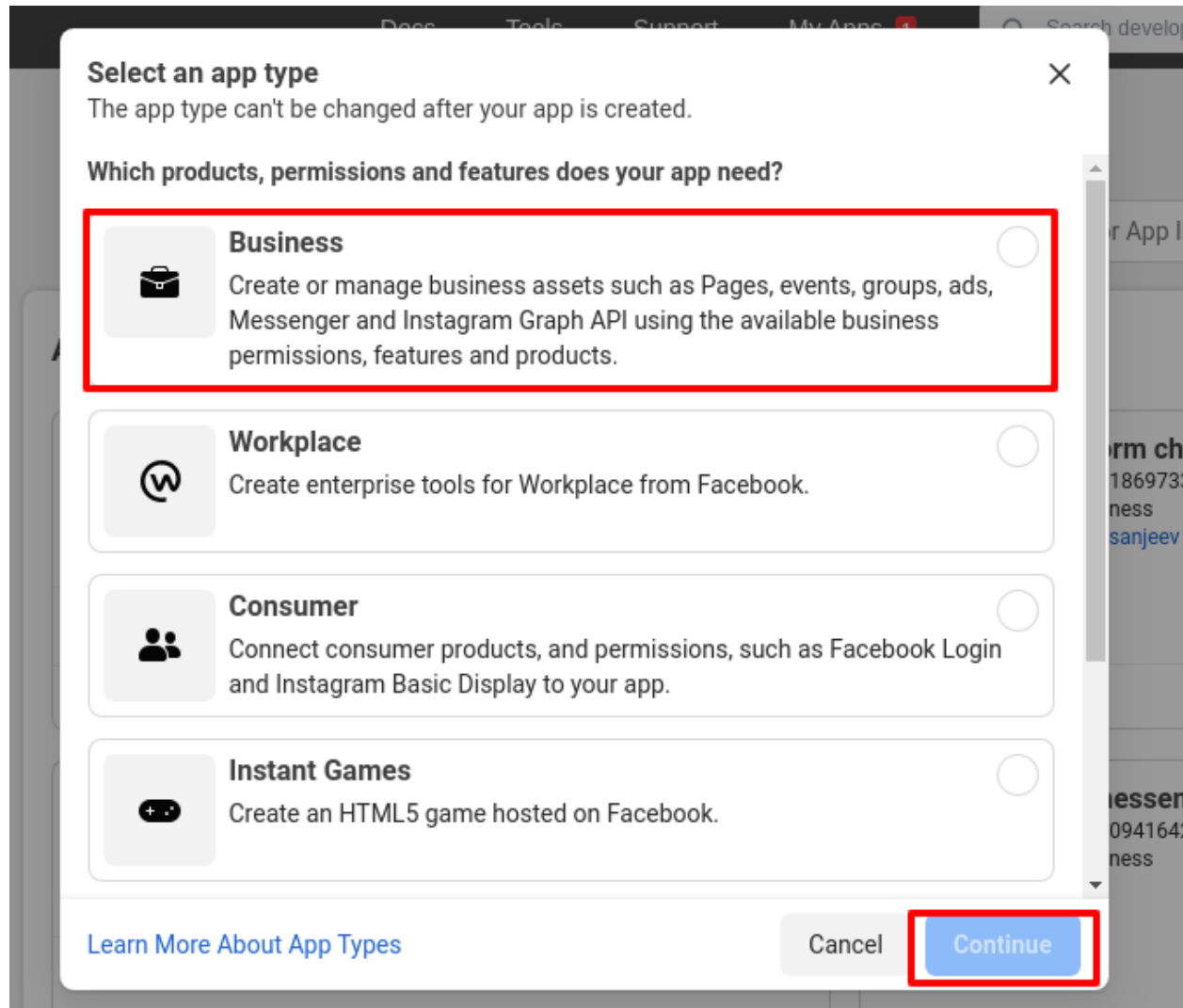
Step 2: Click on "My Apps".

Step 3: Create an app by clicking on the "Create App" button.

Step 4 : Select an app type as "Business" and click on the continue button.

Step 5: Fill "App display Name", Contact Email and choose "App Purpose" as "Yourself or Your own Business", then Click on the "Create App" button.

Step 6: Add Products to Your App by selecting "Facebook Login" , Then click on "Set Up" Button.

Step 7: Go to Facebook Developer Dashboard → Login → Settings of Facebook Developer account page as shown in the image below.
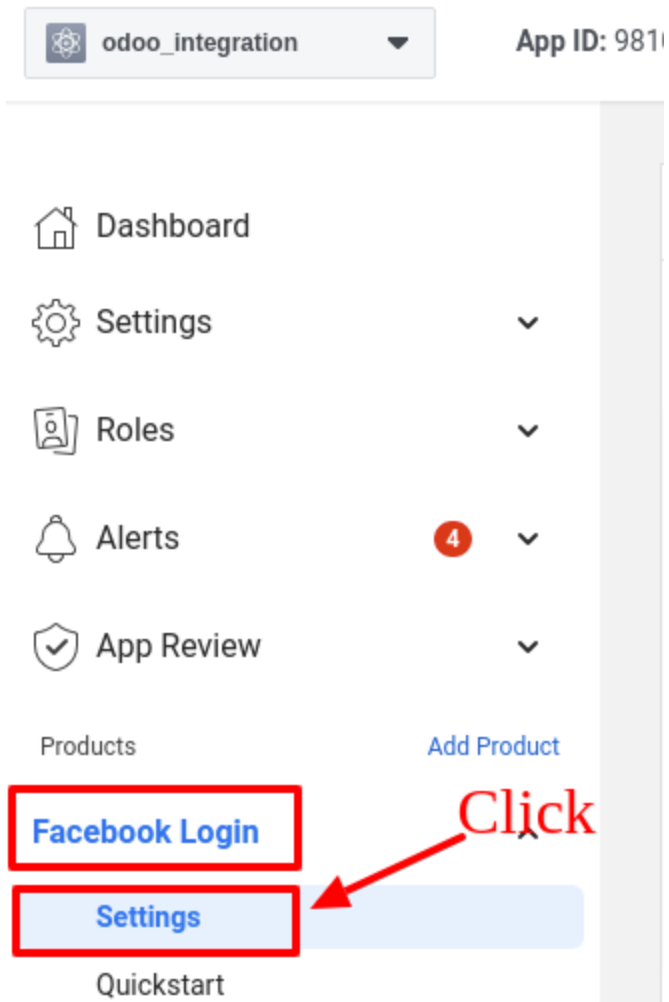
Step 8: Go to Facebook Developer page → Login → Settings. Fill "Valid OAuth Redirect URIs". Given sample as
"https://637c-114-143-52-222.ngrok.io/social_fb_leads/callback
.

The URL should be a https url

It should be appended by the link "/social_fb_leads/callback".

Step 9: On Developer Dashboard Click on Settings → Basic , Copy App ID and App Secret.

Odoo Interface :-

Step 1: Go to CRM → Settings and Check the boolean for "Facebook Account" to Paste the credentials For Facebook App ID and App Secret.
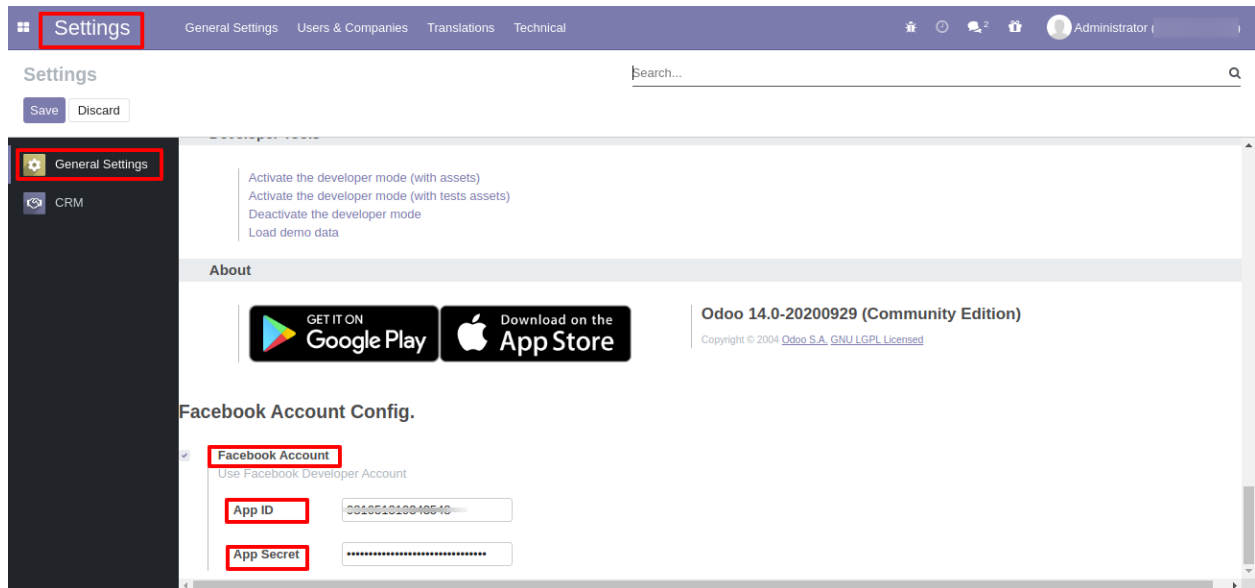
Step 2. Go To Social Dashboard Menu.
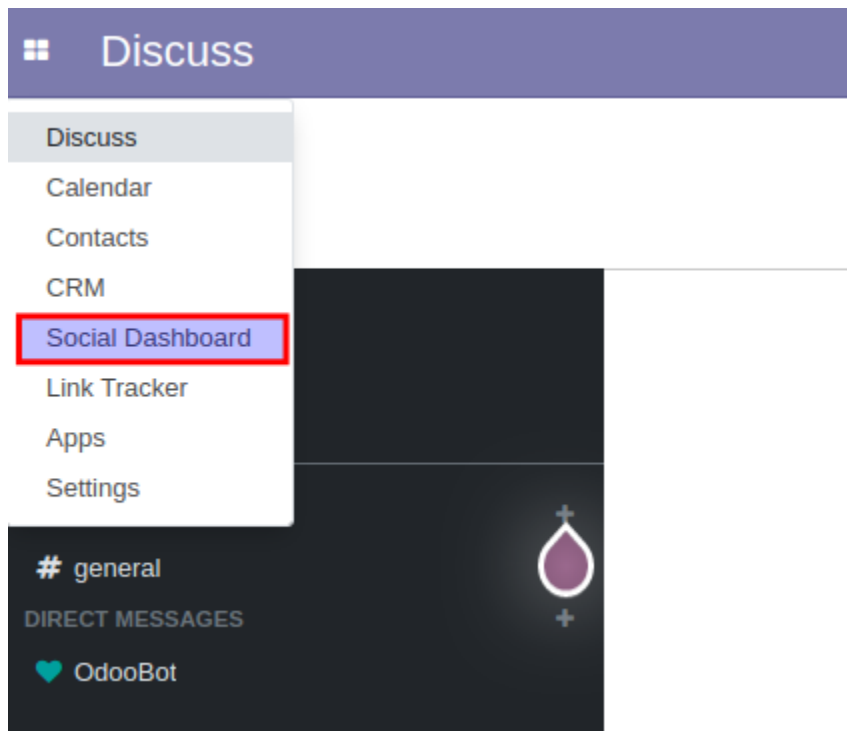
Step 3: On Social Dashboard click on Facebook Dashboard. From this menu you will see the installed module. To authenticate, click on the "Link Account" button.
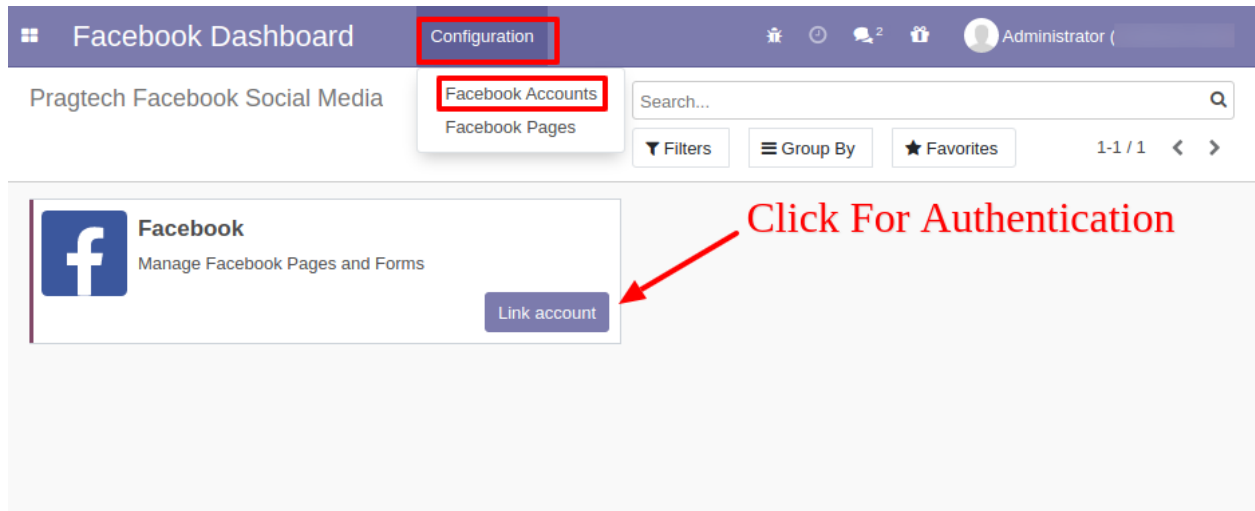
Step 4: After Clicking On "Link Account" button a wizard opens up in which the user can fill in the credentials for the account to be linked.

After filling the credentials the user will be asked to choose pages of Facebook.

Choose one page that you want to link.
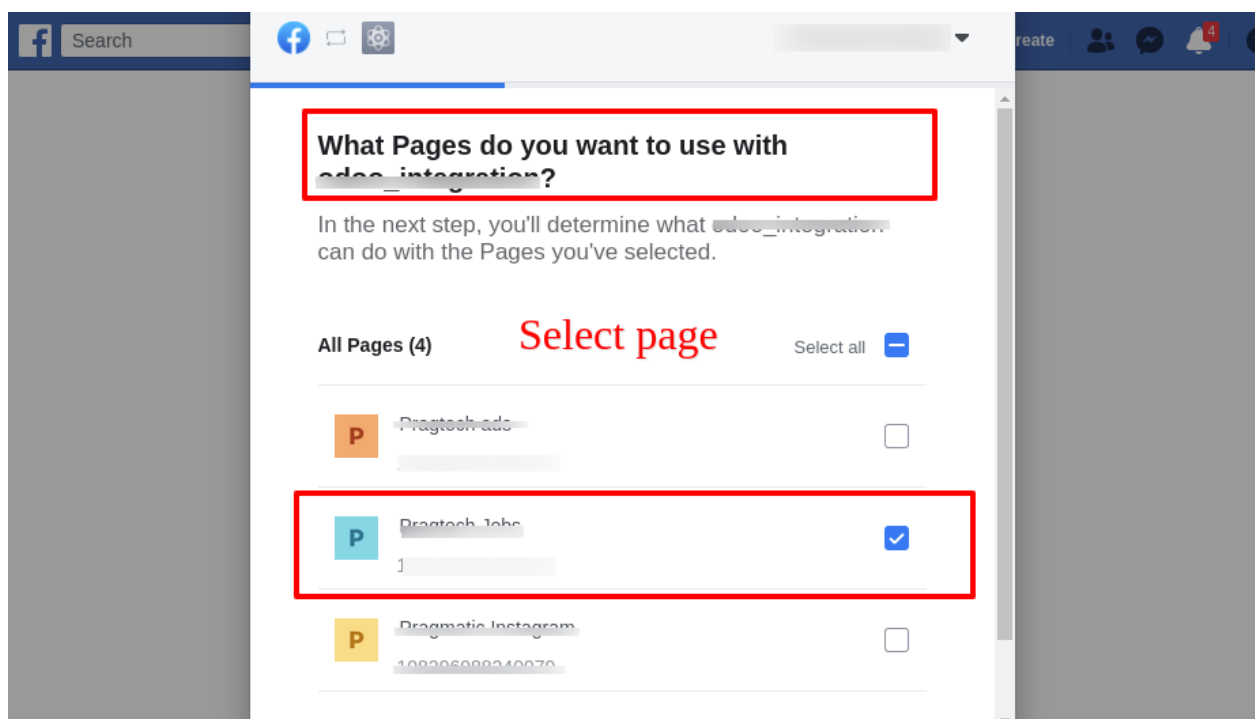
Step 5: After Selecting Page, click on the Done button.
You will be redirected to the confirmation page. click on the "OK" button to complete the authentication part. .
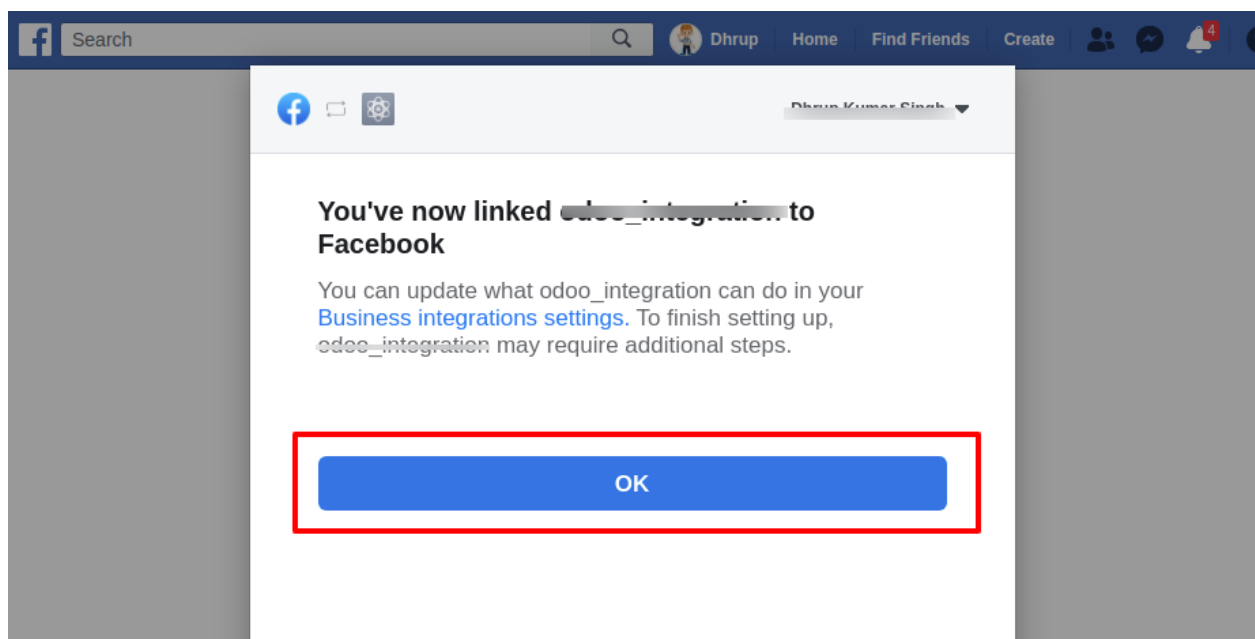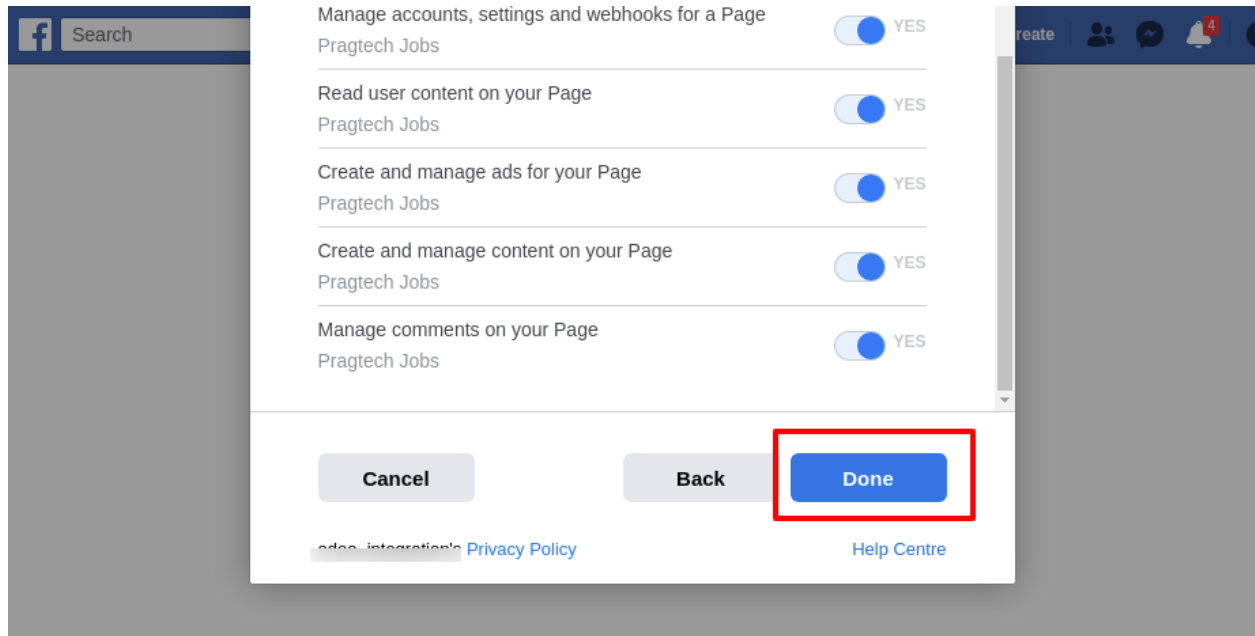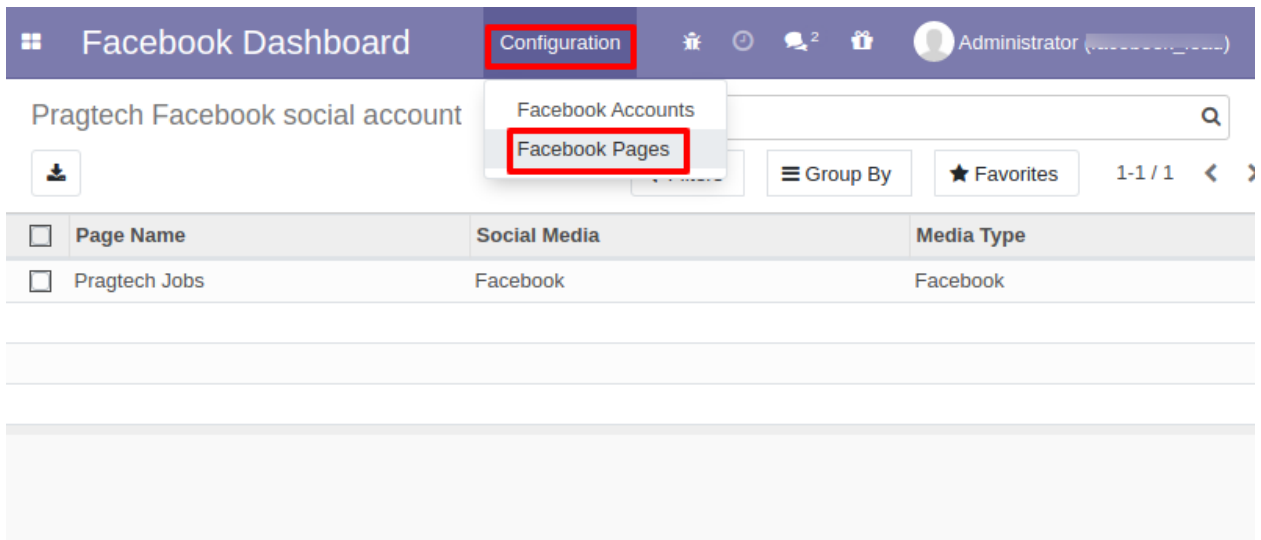
Step 6: After successful authentication the following message will be displayed on the screen shown in the image below.

You can Close this window now

Step 7. Go to Social Dashboard Click on Configuration → Facebook Pages. Here we are going to get "Page Name, Social Media, Media Type , Facebook Page ID, Access Token" from Facebook.
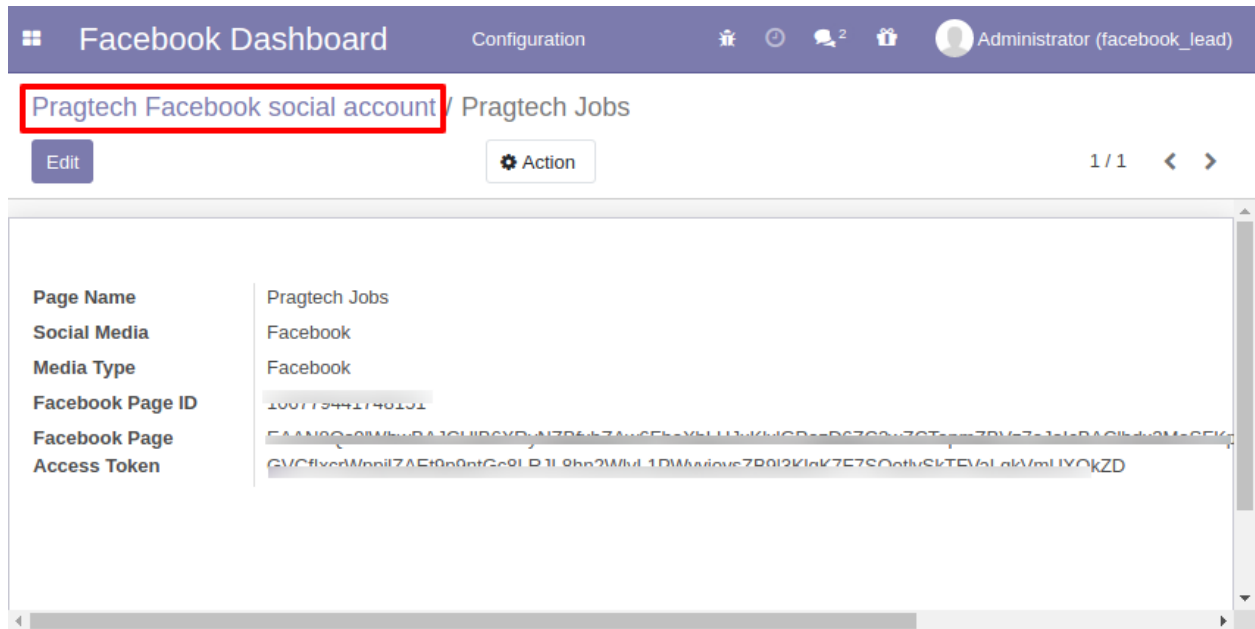
Step 8 : To create Facebook Pages Go to CRM → Configuration → Facebook Pages.
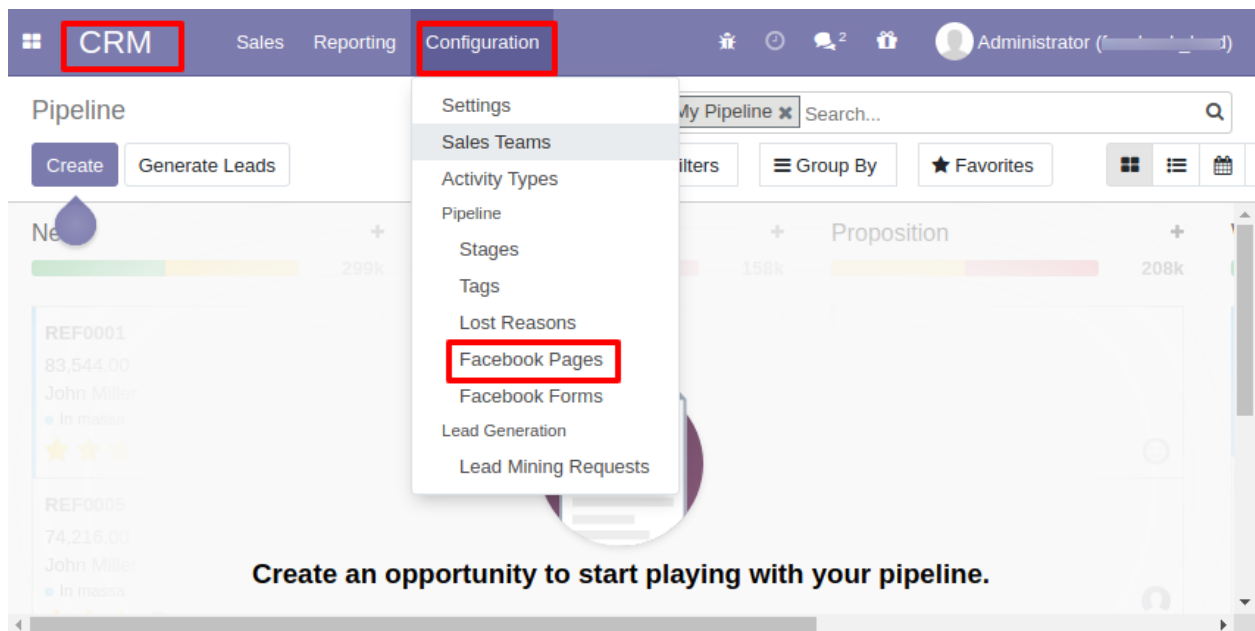
Step 9: Click on the create button→ Select the existing page.

To get the Forms of that page click on the "Fetch Form" Button.

After clicking this button all the Lead Forms of that page will be loaded on the screen.

Step 10 : To Map Lead fields Go to CRM → Configuration → Facebook Forms.

Step 11: On Facebook form View click on "Get Fields" to get Facebook fields .Map existing odoo fields with Fetched Fields of Facebook as shown in the image below.

Facebook Forms / Python Developer

Edit	Create		**Action**	1

Dr

Fetch Fields

Name	Python Developer	**Facebook Page**	Pragtech Jobs
Sales Team	Sales	**Form ID**	370338741292550

Mappings

Mappings

Name	Facebook Field	Odoo Field
Gender	gender	
Full Name	full_name	Contact Name (crm.lead)
Phone/Mobile Number	phone/mobile_number	Mobile (crm.lead)
Email	email	Email (crm.lead)
Are you Ready to Relocate to Pune	are_you_ready_to_relocate_to_pune	

Step 12. On Facebook form after Mapping fields , click on the Validate Form button.

▦	CRM	Sales	Reporting	Configuration					Administrator (	)

Facebook Forms
/ Pragtech Jobs's form created on Wednesday, …

Edit	Create		**Action**	3 / 5	<	>

Validate Form				Draft	Confirm

Get Fields

Name	Pragtech Jobs's form created on Wednesday, 8 September 2021 16:46	**Facebook Page**	Pragtech Jobs
Sales Team		**Form ID**	

Mappings

Mappings

Name	Facebook Field	Odoo Field
Full name	FULL_NAME	
Email	EMAIL	
Phone number	PHONE	

Step 13. To fetch the leads manually Go to Settings→ Technical → scheduled Actions. Select "Fetch Facebook Leads" Scheduled Action (Cron). And click on the "Run Manually" button.

The leads are also fetched automatically by this cron at an interval of 1 hr.

Scheduled Actions / Fetch Facebook Leads

Edit   Create   ⚙ Action   6 / 15   ‹   ›

Run Manually

Fetch Facebook Leads

Model	Lead/Opportunity
Scheduler User	OdooBot
Execute Every	1Hours
Active	⬤
Next Execution Date	09/15/2021 05:59:26
Number of Calls	-1
Priority	5
Repeat Missed	☐

Python Code   Security   Help

Step14 : Lead gets created on odoo with mapped and unmapped fields along with Tracking Information.

Leads /

Edit   Create   ⚙ Action   1 / 1   ‹ ›

dhrup kumar singh

0.00 %

Customer		**Contact Name**	dhrup kumar singh
Company Name		**Email**	
Address		**Email cc**	
Website		**Job Position**	
Language		**Phone**	1236547891 📱 SMS
		Mobile	

Salesperson		**Priority**	☆ ☆ ☆
Sales Team	Sales	**Tags**	

Internal Notes	Extra Info	Facebook Info

Contact Name: dhrup kumar singh

Phone: 1236547891 **Email**: dhup@gmail.com

Gender: male

Are you ready to relocate to pune: yes

Leads / dhrup kumar singh

Edit   Create   ⚙ Action   1 / 1   ‹ ›

Company Name		**Email**	dhup@gmail.com
Address		**Email cc**	
Website		**Job Position**	
Language		**Phone**	1236547891 📱 SMS
		Mobile	

Salesperson		**Priority**	☆ ☆ ☆
Sales Team	Sales	**Tags**	

Internal Notes	**Extra Info**	Facebook Info

Email

Bounce	0

Tracking

Campaign	
Medium	Facebook
Source	Facebook
Referred By	

Analysis

Step15 : More Detailed information on Instagram at 'Instagram Info' page.