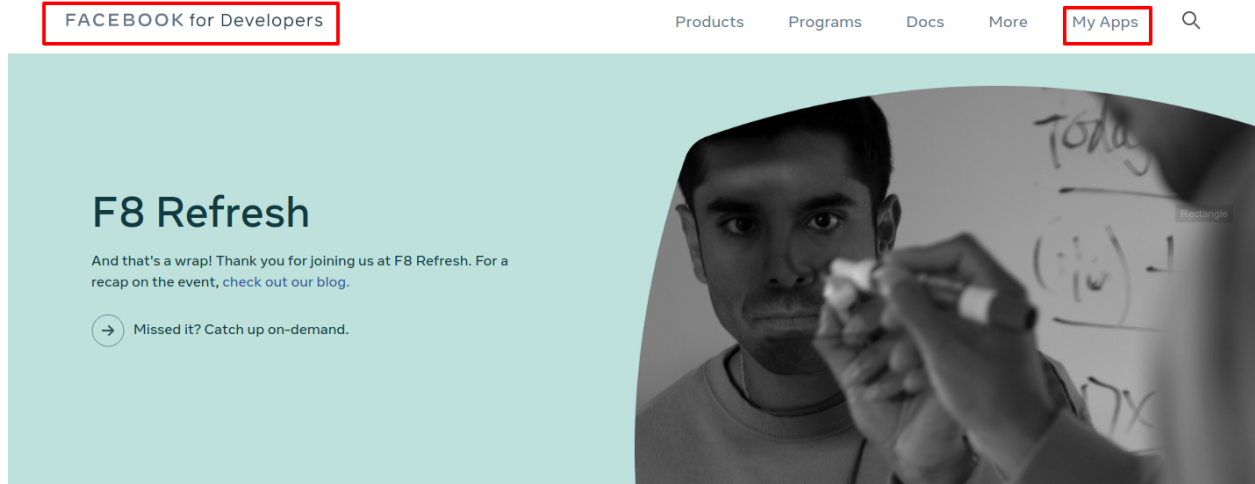


Pragtech CRM Facebook Leads

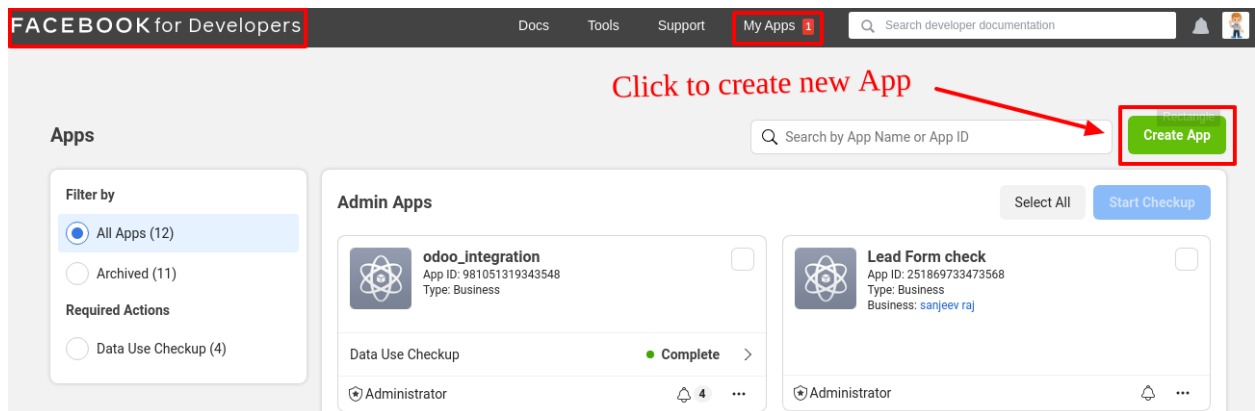
Facebook Developer Account Interface :-

Step 1 : First we have to login into the “Facebook Developer Account” using the following link <https://developers.facebook.com/>.

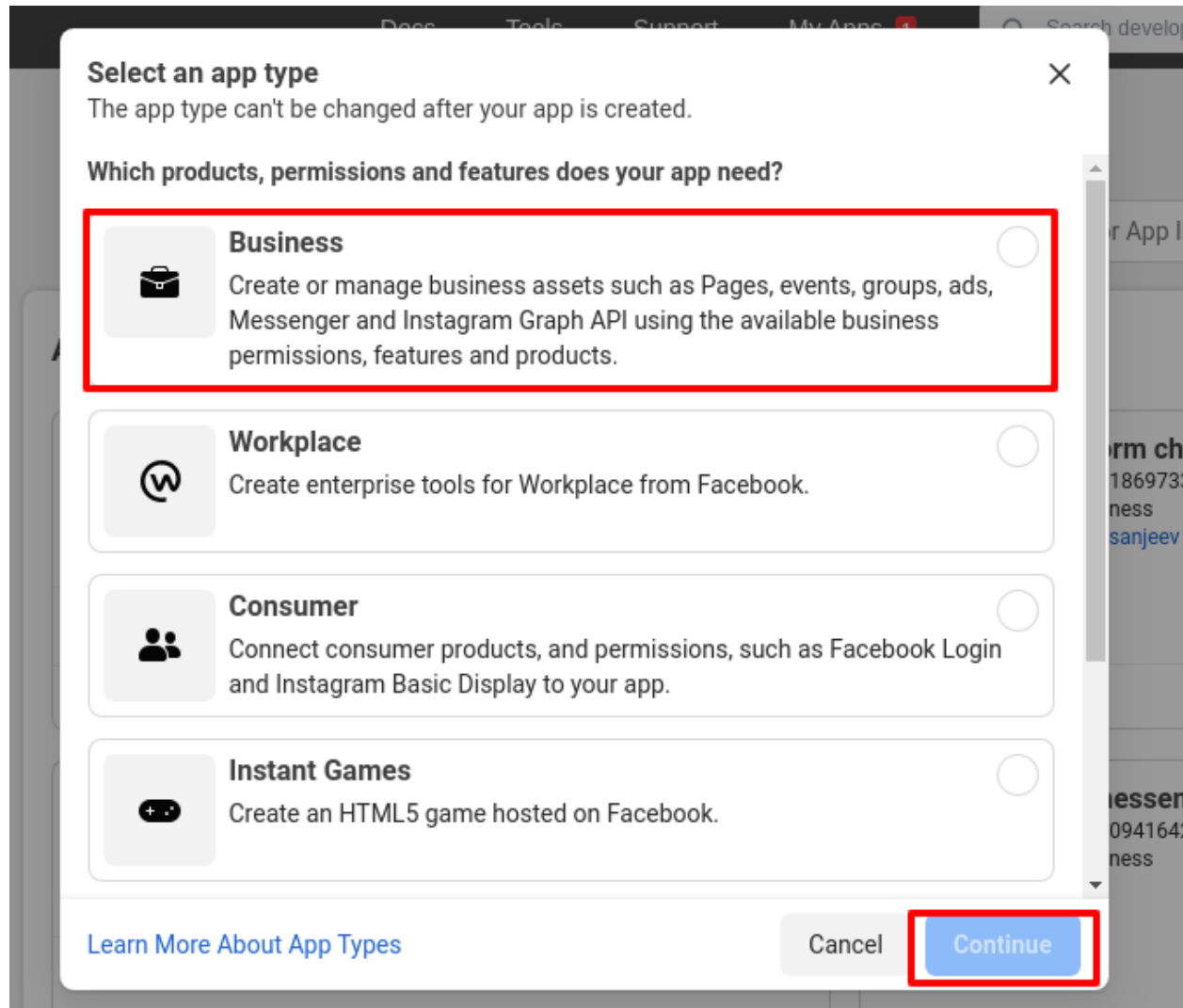
Step 2: Click on “My Apps”.



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.

Create an App

App Display Name

This is the app name associated with your app ID.

App Contact Email

This email address is used to contact you about potential policy violations, app restrictions or steps to recover the app if it's been deleted or compromised.

App Purpose

This app's primary purpose is to access and use data from Facebook's Platform on behalf of:

☒ Yourself or your own business

☐ Clients ⓘ

If you are developing an app that accesses and uses data from Facebook's Platform on behalf of clients, you are subject to [Section 5b of the Platform Terms](#).

Do you have a Business Manager account? · Optional

In order to access certain aspects of the Facebook platform, apps may need to be connected to a verified Business Manager account. If you haven't yet set up an account, you can create one now or later in the process.

< Back

Create App

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

Add Products to Your App

We've streamlined the app creation process by surfacing the products and permissions needed to build the app type you selected.



App Events

Understand how people engage with your business across apps, devices, platforms and websites.

[Read Docs](#)

[Set Up](#)



Audience Network

Monetize your app and grow revenue with ads from Facebook advertisers.

[Read Docs](#)

[Set Up](#)



Facebook Login

The world's number one social login product.

[Read Docs](#)

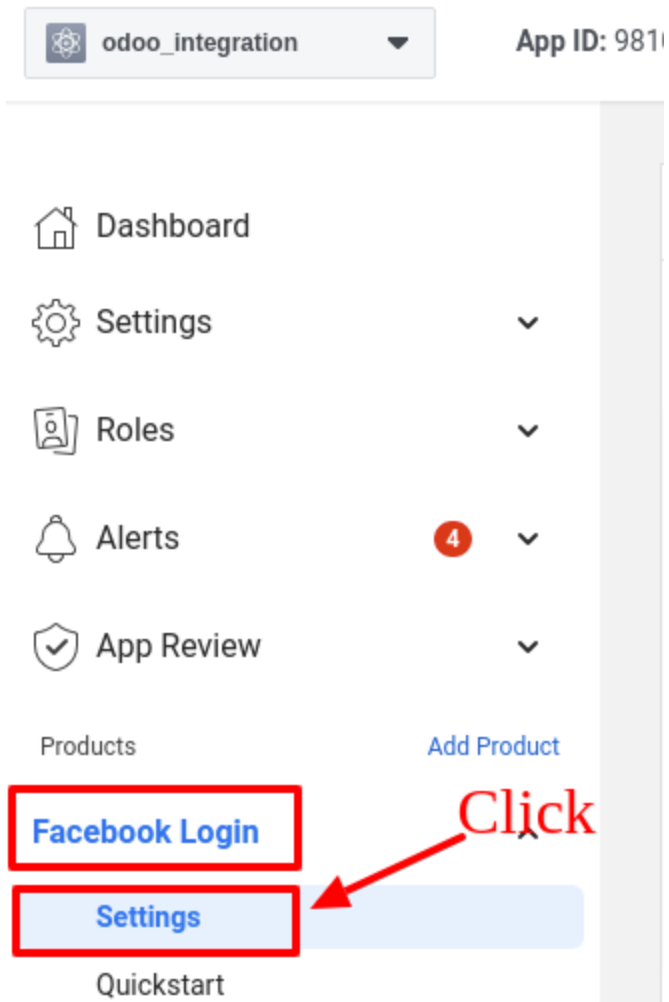
[Set Up](#)

Click



Step 7: Go to Facebook Developer Dashboard → Login → Settings of Facebook Developer account page as shown in the image below.

FACEBOOK for Developers



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"`.

FACEBOOK for Developers Docs Tools Support My Apps 1 Search developer documentation

odoo_integration App ID: 981051319343548 App Type: Business Help

Dashboard Settings Roles Alerts 4 App Review Products Add Product Facebook Login Settings Quickstart Activity Log

Valid OAuth Redirect URIs

Use Strict Mode for Redirect URIs
Only allow redirects that exactly match the Valid OAuth Redirect URIs. Strongly recommended. [?]

A manually specified redirect URI used with Login on the web must exactly match one of the URIs listed here. This list is also used by the JavaScript SDK for in-app browsers that suppress popups. [?]

<https://1e3e-2409-4042-2e83-a89b-af30-93ce-a0bf.ngrok.io/> ×
https://1e3e-2409-4042-2e83-a89b-af30-93ce-a0bf.ngrok.io/social_fb_leads/callback ×

☐ No Login from Devices
Enables the OAuth client login flow for devices like a smart TV [?]

☐ No Login with the JavaScript SDK
Enables Login and signed-in functionality with the JavaScript SDK. [?]

Allowed Domains for the JavaScript SDK
Login and signed-in functionality of the JavaScript SDK will only be available on these domains. [?]

Allowed Domains for the JavaScript SDK

Deauthorize

Deauthorize Callback URL

Discard **Save changes**

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

FACEBOOK for Developers Docs Tools Support My Apps 1 Search developer documentation

odoo_integration App ID: 981051319343548 App Type: Business Help

Dashboard **Settings** Basic Advanced Roles Alerts 4 App Review Products Add Product Facebook Login Activity Log

App ID 981051319343548 **App Secret** Show

Display Name: odoo_integration Namespace:

App Domains:

Contact Email: userdemo@pragtech.co.in

Privacy Policy URL: <https://www.pragtech.co.in/privacy-policy.pdf>

Terms of Service URL: Terms of Service for Login dialog and App Details

App Icon (1024 x 1024)

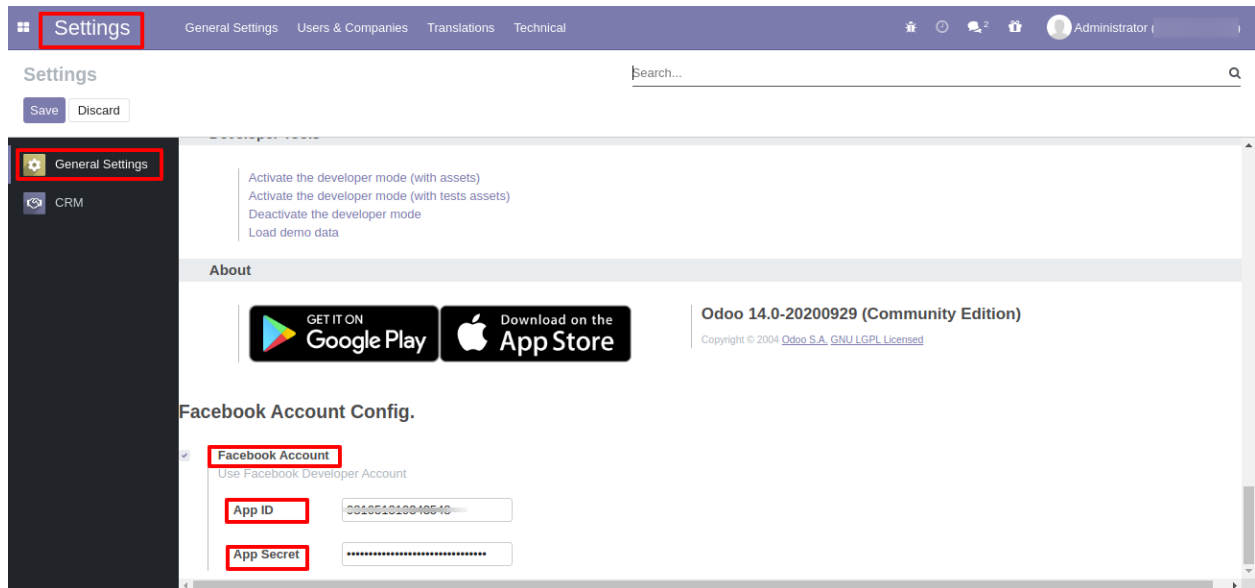
Category: Choose a Category

Find out more information about app categories [here](#)

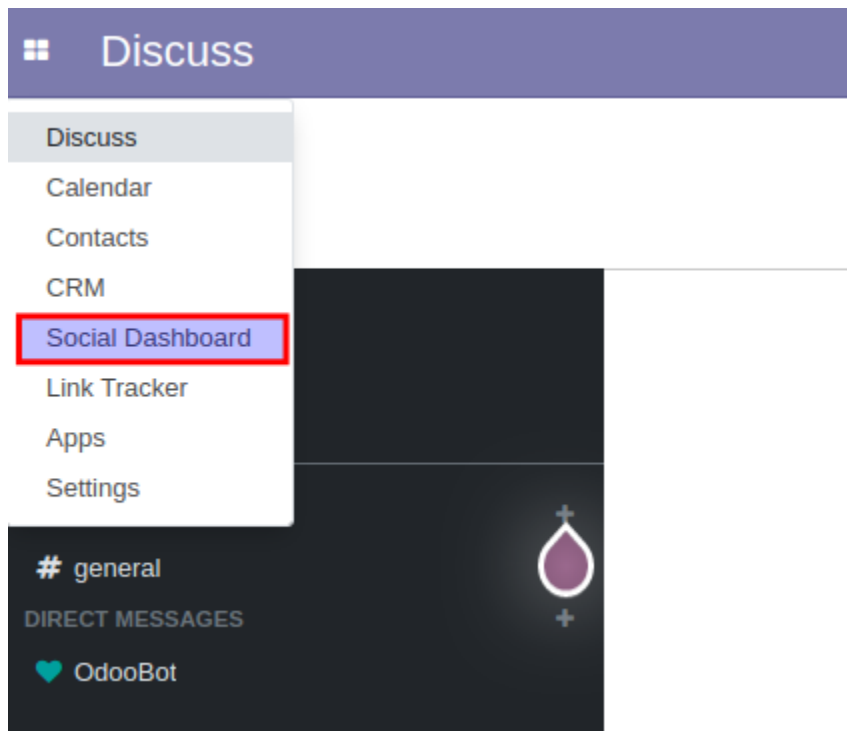
Discard **Save changes**

Odoo Interface :-

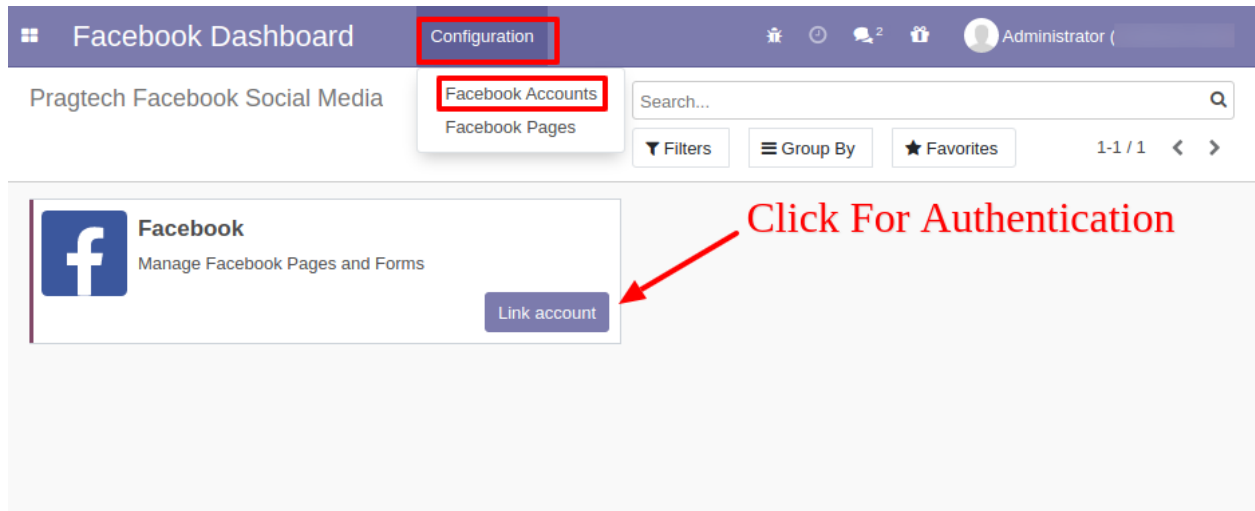
Step 1: Go to CRM → Settings and Check the boolean for “Facebook Account” to Paste the credentials For Facebook App ID and App Secret.



Step 2. Go To Social Dashboard Menu.



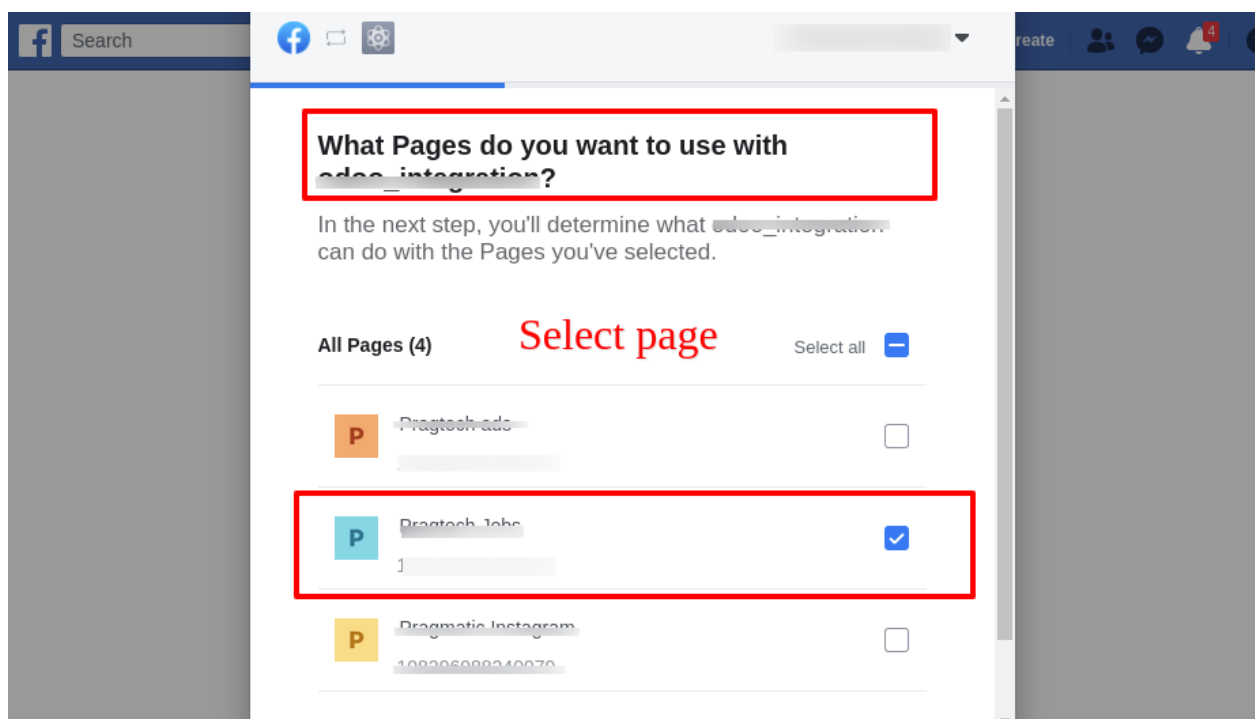
Step 3: On Social Dashboard click on Facebook Dashboard. From this menu you will see the installed module. To authenticate, click on the “Link Account” button.



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.

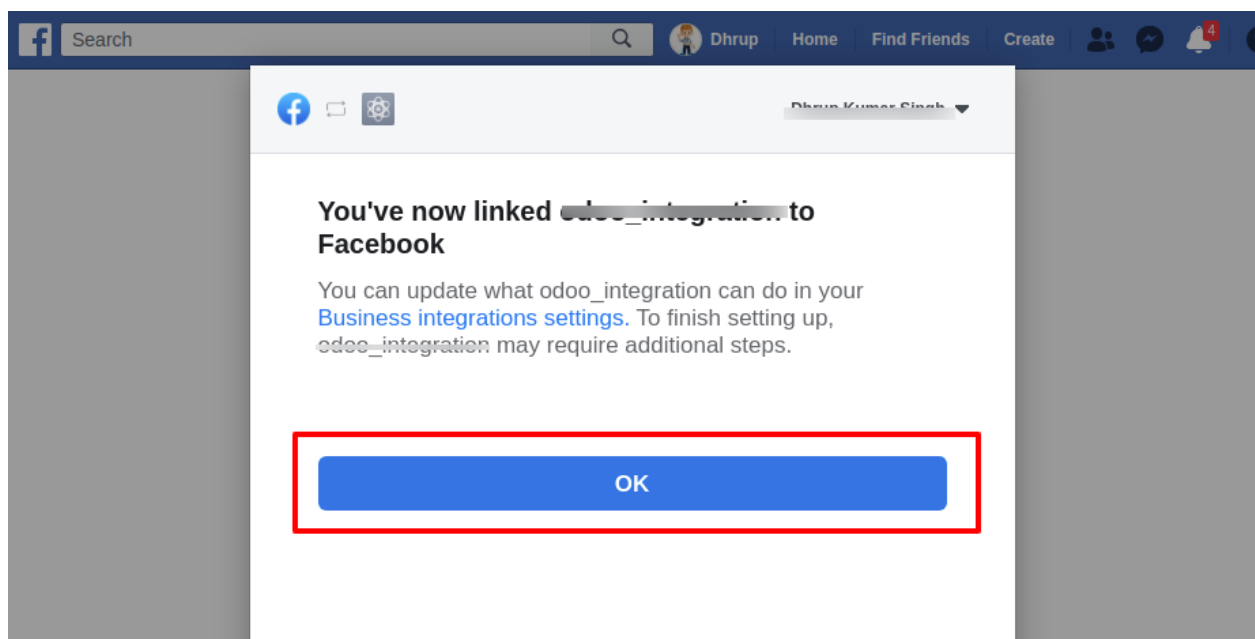
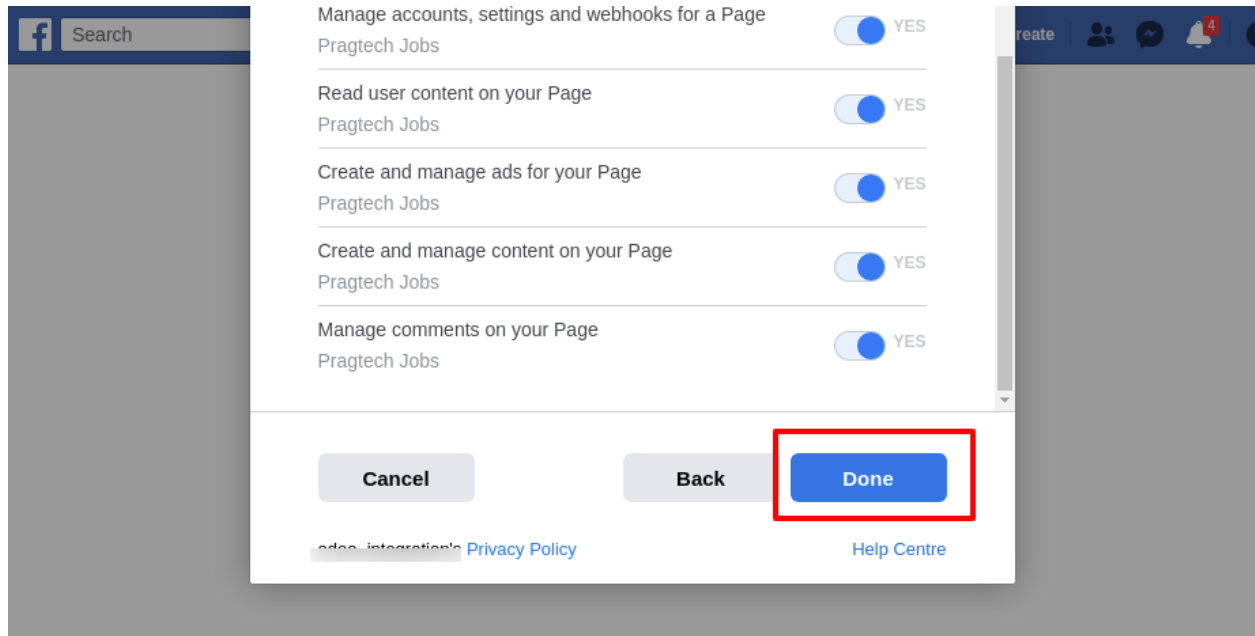
After filling the credentials the user will be asked to choose pages of Facebook.

Choose one page that you want to link.



Step 5: After Selecting Page, click on the Done button.

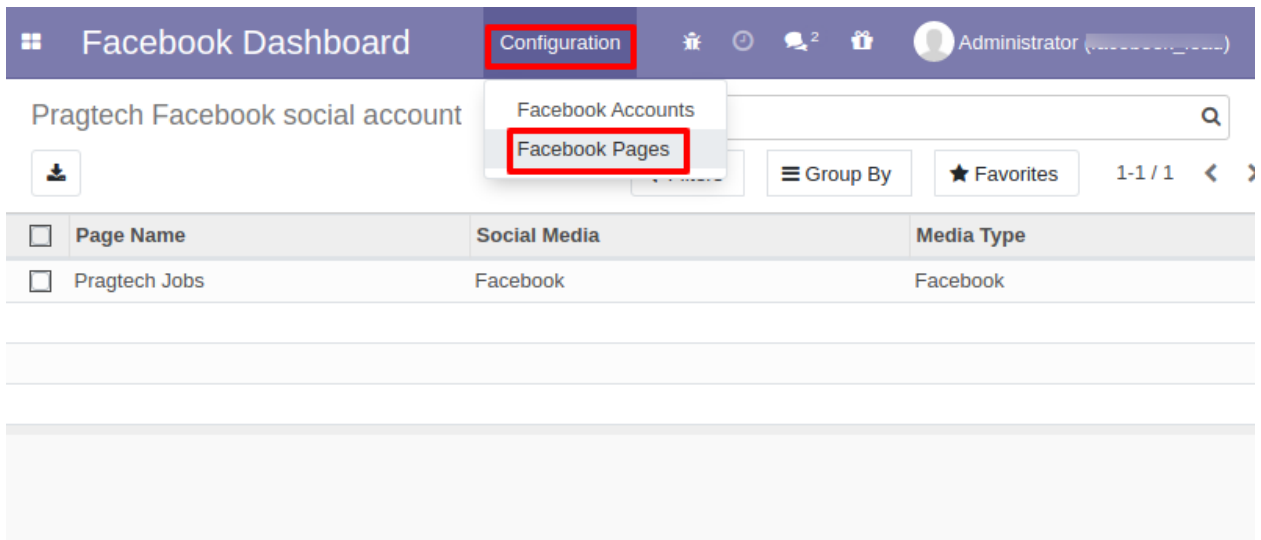
You will be redirected to the confirmation page. click on the “OK” button to complete the authentication part. .



Step 6: After successful authentication the following message will be displayed on the screen shown in the image below.

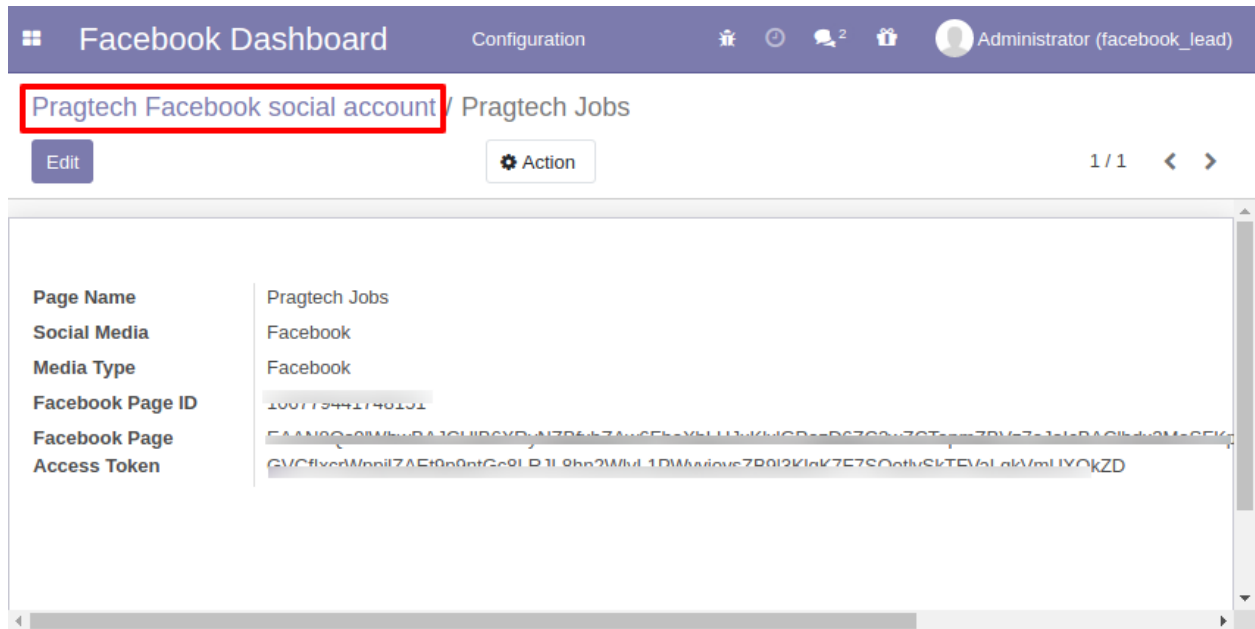
You can Close this window now

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.

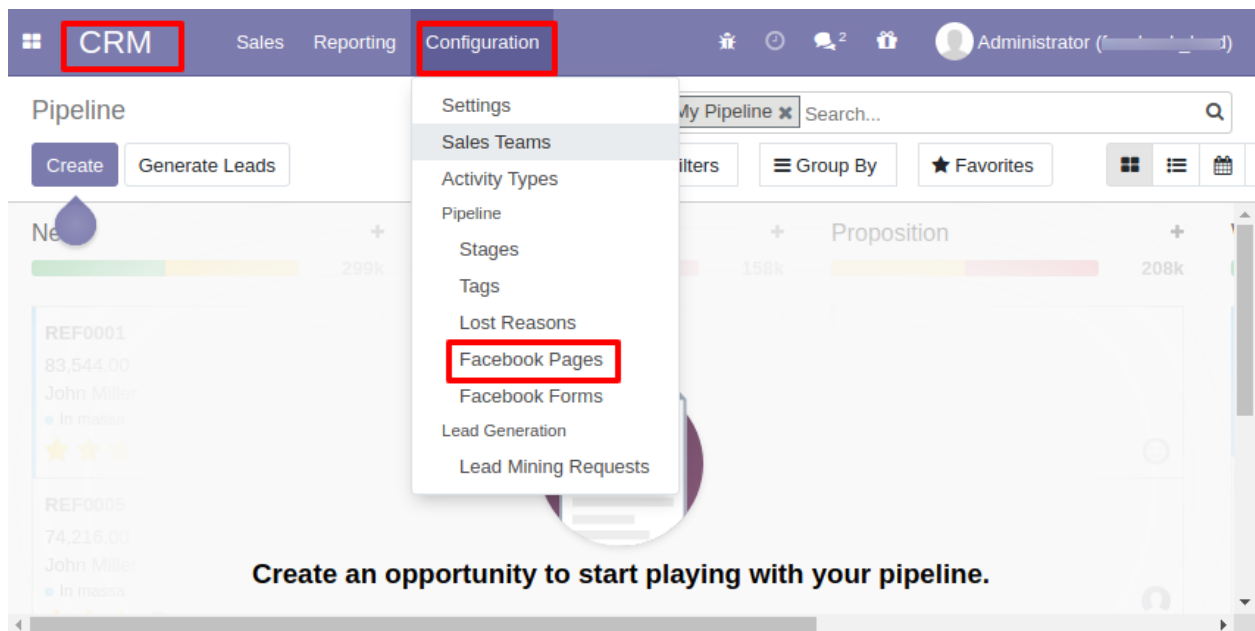


The screenshot shows the Facebook Dashboard interface. The top navigation bar is purple and contains the text "Facebook Dashboard", a "Configuration" button (highlighted with a red box), and several icons. Below the navigation bar, the main content area is titled "Pragtech Facebook social account". A dropdown menu is open under the "Configuration" button, showing "Facebook Accounts" and "Facebook Pages" (highlighted with a red box). To the right of the dropdown menu, there are buttons for "Group By" and "Favorites", and a pagination indicator "1-1 / 1". Below these elements, there is a table with three columns: "Page Name", "Social Media", and "Media Type". The table contains one row with the following data: "Pragtech Jobs", "Facebook", and "Facebook".

<input type="checkbox"/>	Page Name	Social Media	Media Type
<input type="checkbox"/>	Pragtech Jobs	Facebook	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.

CRM Sales Leads Reporting Configuration

Facebook Pages / Pragtech Jobs

Edit Create Action

Fetch Forms

Page Name: Pragtech Jobs
Page ID: 106779441748151

Lead Forms	Name	Form ID
	Python Developer	370338741292550
	Hiring Python Developer	280602420211232
	Pragtech Jobs's form created on Wednesday, 8 September 2021 16:46	1998382287004677
	Hiring Python Developer	286430606203710
	Python Developer Job	283141426590739

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

CRM Sales Reporting Configuration

My Pipeline Search...

Filters Group By Favorites

Settings
Sales Teams
Activity Types
Pipeline
Stages
Tags
Lost Reasons
Facebook Pages
Facebook Forms
Lead Generation
Lead Mining Requests

Create Generate Leads

Ne 196k

REF0001
31,104.00
Wendi Baltz
Integer vilas
☆☆☆

REF0005
97,578.00
Thomas D...

Proposition 212k

Won 226k

REF0004
97,354.00
John Miller
☆☆☆

REF0008
61,992.00
Carrie Helle

Create an opportunity to start playing with your pipeline.

Step 11: On Facebook form View click on “Get Fields” to get Facebookfields .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	Contact Name (crm.lead)
Full Name	full_name	Mobile (crm.lead)
Phone/Mobile Number	phone/mobile_number	Email (crm.lead)
Email	email	
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 (i)

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 Sales 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.

CRM

SalesLeadsReportingConfiguration

Administrator (f)

Leads

EditCreateAction

1 / 1

0.00 %

Customer

Company Name

Address

Website

Language

Contact Name

Email

Email cc

Job Position

Phone

Mobile

Salesperson

Sales Team

Priority

Tags

Internal Notes

Extra Info

Facebook Info

Contact Name: dhrup-kumar-singh

Phone: 1236547891 Email: dhrup@gmail.com

Gender: male

Are you ready to relocate to pune: yes

CRM

SalesLeadsReportingConfiguration

Administrator (f)

Leads

EditCreateAction

1 / 1

Company Name

Address

Website

Language

Email

Email cc

Job Position

Phone

Mobile

Salesperson

Sales Team

Priority

Tags

Internal Notes

Extra Info

Facebook Info

Email

Bounce

0

Tracking

Campaign

Medium

Source

Referred By

Facebook

Facebook

Analysis

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

CRM

SalesLeadsReportingConfiguration

Administrator

Leads

EditCreate

Action

1 / 1 < >

Salesperson		Priority	☆☆☆
Sales Team	Sales	Tags	

Internal Notes

Extra Info

Facebook Info

Facebook Info

Facebook Lead

Facebook Date

Create

Facebook Page

Facebook Form

Facebook Adset

Facebook Ad

Facebook Campaign

Facebook Is Organic

202177507055200

09/14/2021 13:18:28

Pragtech Jobs

Python Developer

Facebook

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