



Facebook Leads to File Service

September 2023

1 Foreword

Copyright

The contents of this manual cover material copyrighted by Marigold. Marigold reserves all intellectual property rights on the manual, which should be treated as confidential information as defined under the agreed upon software licence/lease terms and conditions.

The use and distribution of this manual is strictly limited to authorised users of the Marigold Interactive Marketing Software (hereafter the “Software”) and can only be used for the purpose of using the Software under the agreed upon software licence/lease terms and conditions. Upon termination of the right to use the Software, this manual and any copies made must either be returned to Marigold or be destroyed, at the latest two weeks after the right to use the Software has ended.

With the exception of the first sentence of the previous paragraph, no part of this manual may be reprinted or reproduced or distributed or utilised in any form or by any electronic, mechanical or other means, not known or hereafter invented, included photocopying and recording, or in any information storage or retrieval or distribution system, without the prior permission in writing from Marigold.

Marigold will not be responsible or liable for any accidental or inevitable damage that may result from unauthorised access or modifications.

User is aware that this manual may contain errors or inaccuracies and that it may be revised without advance notice. This manual is updated frequently.

Marigold welcomes any recommendations or suggestions regarding the manual, as it helps to continuously improve the quality of our products and manuals.

2 Table of Contents

1	Foreword	2
2	Table of Contents	3
3	Creating the App	4
3.1	Create the Facebook App	4
3.2	App Review	5
3.3	Leads Access Manager	5
4	Creating Tokens	6
4.1	Create short lived access token	6
4.2	Create long lived access token	6
4.3	Create never expiring access token	7
4.3.1	Find the Pageld	7
4.4	Verifications	8
4.4.1	Create a test lead	8
4.4.2	Test retrieving a Form	8
4.4.3	Test retrieving Leads for a Form	8
5	Functionality	9
5.1	Form retrieval	9
5.2	Lead exporting	9
5.2.1	DATA Loader setup	9
6	Configuration table	11
6.1	Add configuration table in Campaign	11
6.2	Edit configuration table in Campaign	12

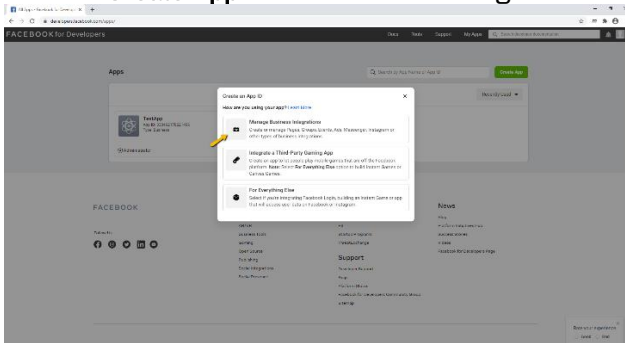
3 Creating the App

To have access to the lead forms data we need a page access token from the customer. This token should be a token that can never expire.

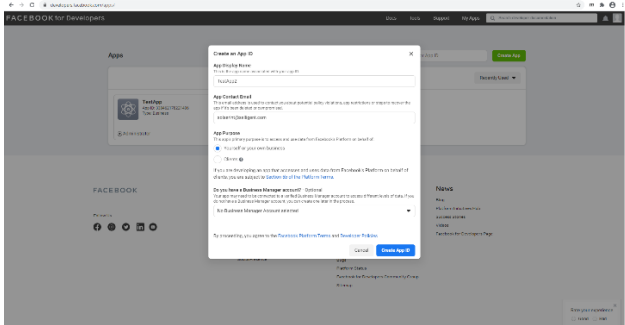
3.1 CREATE THE FACEBOOK APP

Retrieving leads is done with a Facebook App. So, if you have not created an app yet, then you need to create an app at <https://developers.facebook.com/apps/>

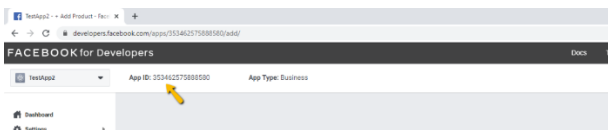
Click on **Create App** and then select **Manage Business Integrations**



Fill in the necessary information and click **Create App ID**



You can find your App ID on the top left corner



3.2 APP REVIEW

Your app needs to be in Live Mode for you to receive Leads with the GraphAPI.

- **Submit** your app for review following these guidelines.

<https://developers.facebook.com/docs/app-review>

!Note : [App Types](#) determine what permissions and features can be requested for approval through the App Review process. Set the App Type to None (to allow the server-to-server app review)

- Use the server to server App submission:

<https://developers.facebook.com/docs/app-review/resources/sample-submissions/server-to-server>

a. Permissions

- ads_management
- pages_show_list
- pages_read_engagement
- pages_manage_Ads
- leads_retrieval
- business_management
- pages_manage_metadata

b. Explanation:

We use this App to automatically import forms and the leads who fill in a Facebook form. This automatic process enables us to send out communication to new leads as soon as they register. We will only import leads who gave their opt-in consent and will target them according to the GDPR guidelines in our CRM platform.

Facebook requires these permissions to read leads and form data as described in the Facebook help page : <https://developers.facebook.com/docs/marketing-api/guides/lead-ads/retrieving>

c. Screen recording

If you need to submit a screen recording of the app ask you Marigold contact, we can provide this video to you.

!Note : if your leads are in different organizations you might need to apply for advanced access permissions during the app review. <https://developers.facebook.com/docs/graph-api/overview/access-levels/>

3.3 LEADS ACCESS MANAGER

If you have leads access manager enabled in your Facebook this affects how you retrieve leads with the graph API and you will need to set the pages settings up correctly, so the user linked to the token you created has the correct permissions to access the leads.

!Note : if the leads access manager is enabled and not setup correctly you will only receive test leads from the graph API or an empty data result.

The leads access manager can be found at business manager -> settings -> integrations -> lead access -> There you can select the specific page -> and assign the correct user to access leads.

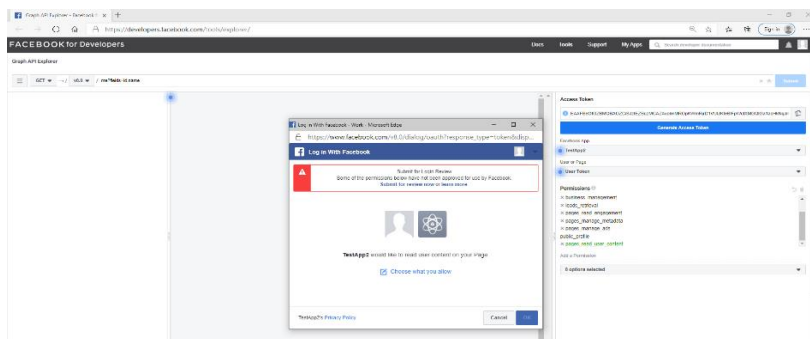
More information: <https://www.facebook.com/business/help/1440176552713521?id=735435806665862>

4 Creating Tokens

4.1 CREATE SHORT LIVED ACCESS TOKEN

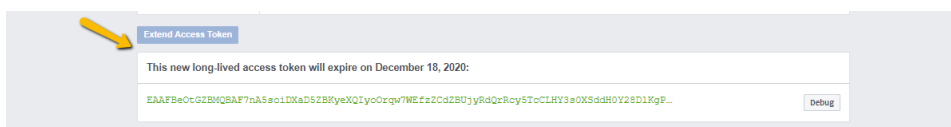
- Go to tool explorer <https://developers.facebook.com/tools/explorer/>
- Select your Facebook App and the option ‘Page Access Token’
If no pages are added yet a popup window will appear asking to select the pages you want to add to the Facebook App.
- Add the necessary permissions
 - ads_management
 - pages_show_list
 - pages_read_engagement
 - pages_manage_Ads
 - leads_retrieval
 - business_management
 - pages_manage_metadata
 In the popup window you must submit the permissions to the App.
- A new access token is automatically generated in the Access Token field.

! Do not click Generate Access Token because it will create a new blank token
! Verify the settings of the access token by clicking on the i-button next to the token.



4.2 CREATE LONG LIVED ACCESS TOKEN

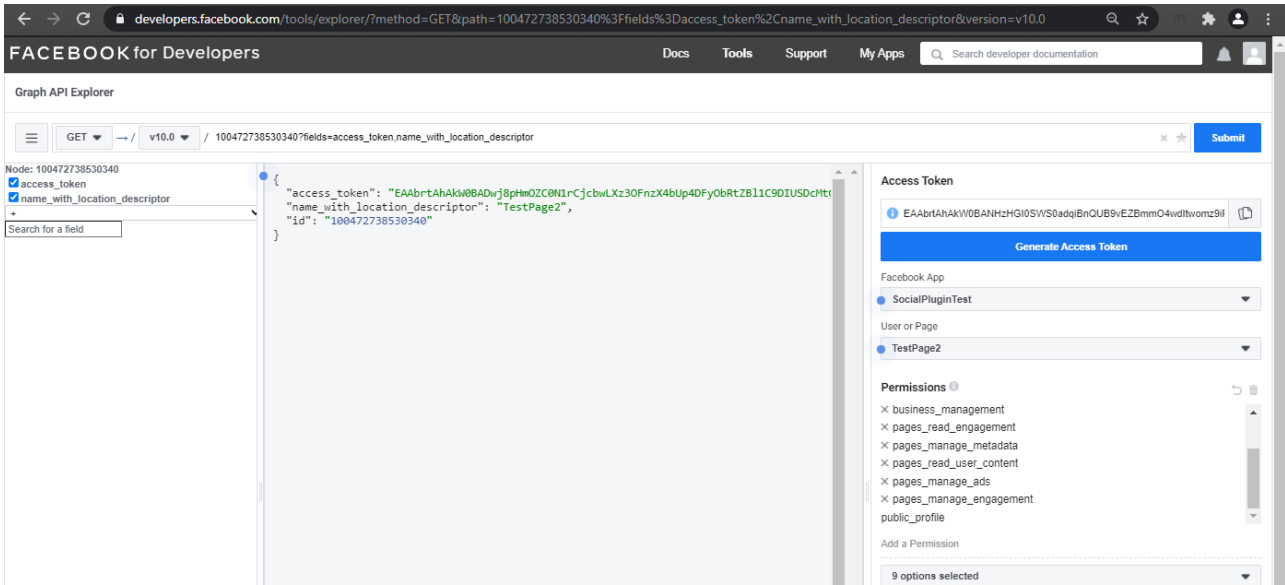
- Go to <https://developers.facebook.com/tools/debug/accesstoken/> and copy the access token in the text field and click debug.
- If this is a short-lived user token (with the necessary permissions) then at the bottom of the debug page you will find the button “Extend Access Token”, pressing that will extend the expiry time of the access token with 60 days.
- Copy that Access Token and proceed to create a never expiring page access token
! not the entire access token is shown, click debug to open a new debugger to copy the token.



4.3 CREATE NEVER EXPIRING ACCESS TOKEN

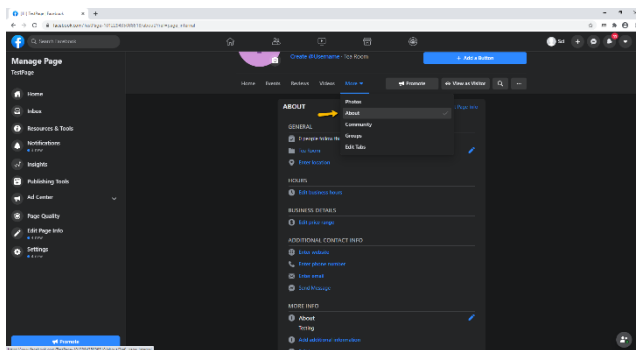
- Go to <https://developers.facebook.com/tools/explorer/>.
- Paste the long-lived access token generated in previous step inside “Access token” field.
! Do **not** change any settings and **do not click** generate access token
- Get the Access token

At the top inputbar: fill in [YourPageID]?fields=access_token (ex: 123456789?fields= access_token)
Copy the access token in the middle pane and verify this in the [access token tool](#).

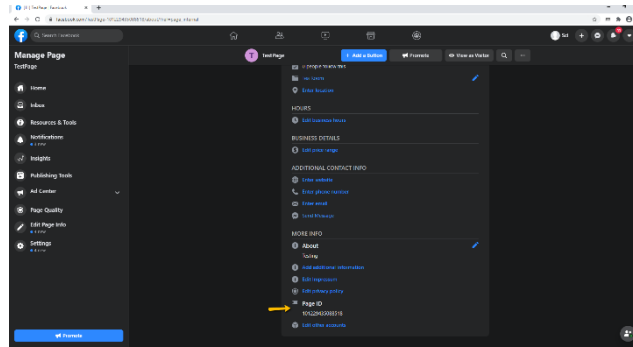


4.3.1 FIND THE PAGEID

- Go to facebook.com.



- Go to your page and click on More > About.
- You will find the PageId in the section more info



4.4 VERIFICATIONS

4.4.1 CREATE A TEST LEAD

- Go to <https://developers.facebook.com/tools/lead-ads-testing>
- Select the Page, Form.
- Create a Lead.

4.4.2 TEST RETRIEVING A FORM

- Go to https://graph.facebook.com/v8.0/{PageID}/leadgen_forms?access_token={YourAccessToken}
- This should return a list of forms in your browser.

4.4.3 TEST RETRIEVING LEADS FOR A FORM

- Go to https://graph.facebook.com/v8.0/{FormId}/leads?fields=created_time,id,ad_id,form_id,field_data,custom_disclaimer_responses&access_token={YourAccessToken}
- This should return a list of leads for that form in your browser.

5 Functionality

5.1 FORM RETRIEVAL

There's also an option to download lead form metadata from Facebook into the configuration table. This way you don't have to copy them over manually. The only thing is that Facebook doesn't allow to provide filters so if this is activated, it will download all forms.

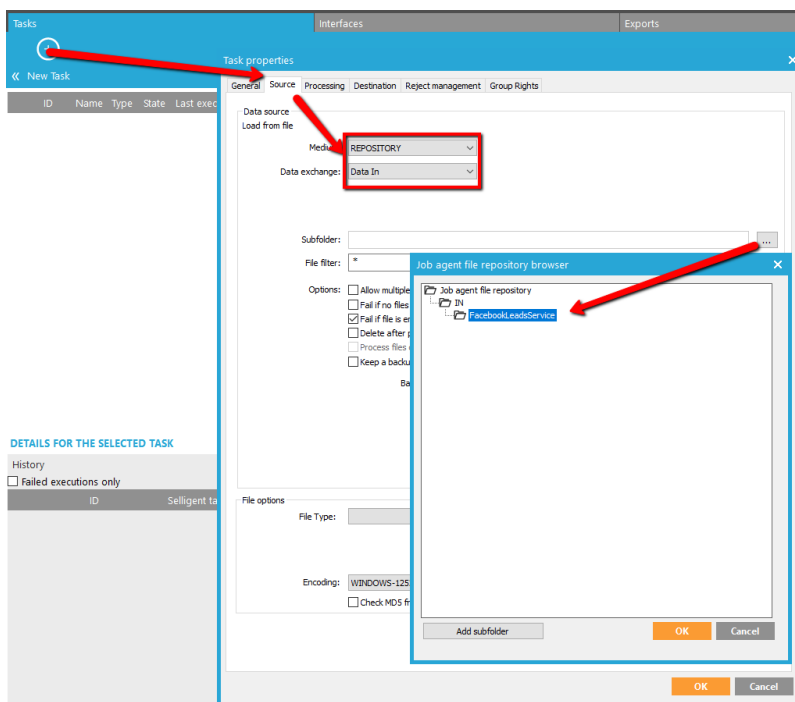
By default, they will be set to Disabled = 1. So, after retrieval you will have to provide a filename and set the disabled to 0 before files are generated.

This functionality fills FORM_ID, FORM_NAME and FORM_STATUS. To activate this functionality, we need a Facebook access token that can access the list and the Facebook Page Id where the lead forms reside.

5.2 LEAD EXPORTING

The application will export leads captured by a Facebook lead generation form. It will retrieve new entries every 5 minutes and will put them as a CSV file on an internal storage space accessible via the Campaign tools. (e.g. to be processed by a data load process). For this we need at least the APP_KEY, FORM_ID (of the lead form) and an EXPORT_FILE_NAME (it uses this name to write a file on internal storage).

An example of where to find the folder in Campaign:



When we receive an “ARCHIVED” state from Facebook on the form, we will retrieve leads one more time and set the DISABLED = 1 right after that. From then on, the leads will not be retrieved anymore.

5.2.1 DATA LOADER SETUP

You can use a data loader to read the CSV file into the solution.

In order to set this up you will need to generate a lead and map the fields from the csv file into the correct table, fields.

The CSV file will contain the fields : "id";"created_time";"form_id";"ad_id";
and the form specific fields from your Facebook form : "formfield1";"formfield2"; ...

6 Configuration table

Physical table name: CFG_FACEBOOK_LEADGEN_CONFIG

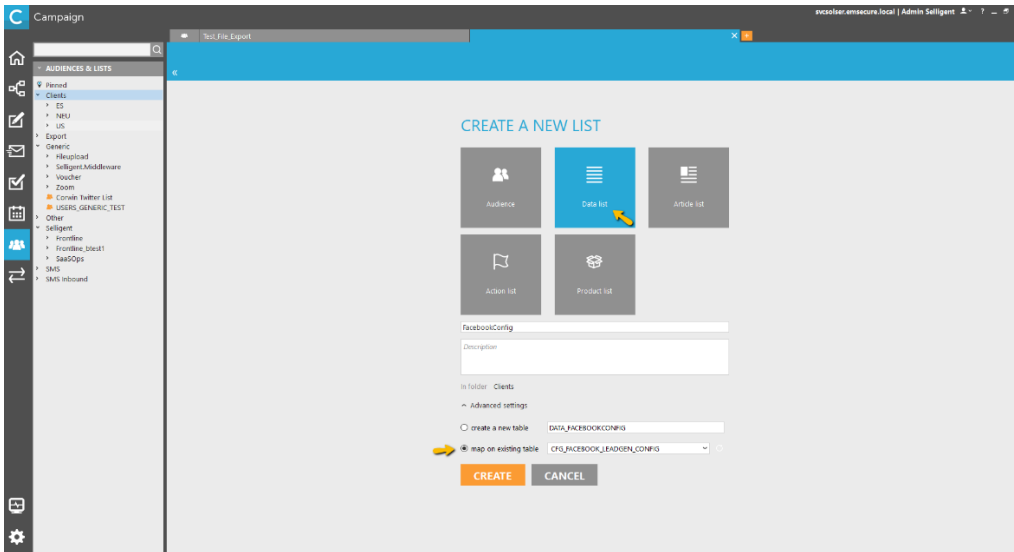
FIELDNAME	DATA TYPE	DEFINITION
ID (S)	INT	Autoincrement id
APP_KEY*	NVARCHAR(250)	Facebook access token. To be generated by customer (see next chapter).
FORM_ID*	NVARCHAR(25)	The id of the Facebook form from which to retrieve data
LAST_SYNC_DT (S)	DATETIME	The last time the sync ran
EXPORT_FILE_NAME*	NVARCHAR(50)	The name of the filename. One replacement param available: [DATETIME] > YYYY-MM-DD-hh-mm-ss
CREATED_DT	DATETIME	Date the config record was created
MODIFIED_DT	DATETIME	Date the config record was last modified
DISABLED	BOOLEAN	When set to 1, this form won't be processed
FORM_NAME	NVARCHAR(255)	Name of the form (optional)
FORM_STATUS	NVARCHAR(50)	
LAST_LEAD_DT (S)	DATETIME	Autoincrement id

Fields with *: Mandatory to fill out

Fields with S: System fields. Don't change or fill

6.1 ADD CONFIGURATION TABLE IN CAMPAIGN

- Go to Campaign.
- Click on Audiences & lists.
- Click on Create New.
 - select Data list.
 - enter a Name and description.
 - click on advanced settings.
 - select map on existing.
 - Select CFG_FACEBOOK_LEADGEN_CONFIG.



6.2 EDIT CONFIGURATION TABLE IN CAMPAIGN

- Click on tap data
- Optionally you can fill in a value to filter on
- Click on Query to get the data
- There you can view, add, edit or delete the forms that the facebook.leadstofile.app loads.

