# Oracle Responsys®

## **Facebook Lead Ads Integration**

**ORACLE**<sup>°</sup> | responsys<sup>°</sup>

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### **Executive Summary**

The Facebook Lead Ads integration with Responsys allows marketers to target Facebook users with an ad, that when clicked on, will present the user with a Facebook Form. When the user completes the Form, s/he will be added to the Responsys Profile list it is associated with. Configuration of this solution requires that objects be created in both the Facebook and Responsys systems, and then for the CSM or customer to work with the Support team to complete the configuration by mapping the Facebook and Responsys objects.

This document summarizes the steps necessary to setup a Facebook Lead Ads integration with Responsys, mainly from the Responsys point of view. It outlines the different teams/roles that need to be involved in this process and their respective responsibilities.

## **Solution Components**

- 1. Facebook Lead Ad A Facebook ad, when clicked on, will take the user to a Facebook Form.
- 2. Facebook Form A Form that captures various information to be imported into the Responsys account. The fields on the form are specified by the marketer and need to map to the fields in the Responsys Form.
- 3. Responsys Form a Form created in the Responsys account that is required to capture the Facebook Form data upon submission. The Responsys Form will not be accessed directly by any user.
- 4. Responsys List The List that will capture the submitted Facebook Form data. The Responsys Form fields need to map to the Facebook Form and must exist on the Responsys List that will capture the submitted data.

Group	Role	Responsibility
Client	Marketer	Define the end-to-end Marketing workflow for collecting information from Facebook and communicating with the Customer.
Responsys/Client	Solution Architect	Help architect the orchestration workflow starting with data collection to driving cross

### **Roles and Responsibilities**

		channel communication to the customer as a real time process. This role can also guide the Client on how to receive any event data created as a result of this orchestration flow for
		reporting purposes.
Client	Developer or Product Consultant	<ol> <li>Build the Lead Ads form in Facebook</li> <li>Build the Responsys hosted FORM that will collect the information and write to the tables stored in Responsys.</li> <li>Build any Campaigns or Programs that are triggered as result of user action on the Facebook hosted form.</li> <li>Responsys Technical Support to setup the link in OAG between FB Form ID and Responsys FORM URL.</li> </ol>
Responsys	Technical Support	Complete configuration, mapping Facebook Page id to Responsys FORM URL.

## Configuration

This section describes the steps you need to follow to configure the Responsys portion of this solution. It is assumed that the Facebook Lead Ad and corresponding Facebook Form has already been created and configured in the client's Facebook account. You can refer to Facebook's help section on Lead Ads for more information.

#### **Step 1: Creating Tables**

Create a profile list for the form to store the data. Optional PETs and supplemental tables can also be created to expand the storage of personalization data.

Profile List

	S
Create list — Define the name	and location of the List.
Save	cel
Name:	[bla_list Names cannot be longer than 100 characters and can include only these characters: A 2 a 2 0-3 space 1 - $\oplus \_[]$ {}
Folder:	select folder 🗸
Description:	

fbla\_list FBLA Test

Name: Folder:

#### Schema

System Fields	
RIID_	Integer Field
CREATED_SOURCE_IP_	Text Field (to 255 chars)
CUSTOMER_ID_	Text Field (to 255 chars)
EMAIL_ADDRESS_	Text Field (to 500 chars)
EMAIL_DOMAIN_	Text Field (to 255 chars)
EMAIL_ISP_	Text Field (to 255 chars)
EMAIL_FORMAT_	Single character field
EMAIL_PERMISSION_STATUS_	Single character field
EMAIL_DELIVERABILITY_STATUS_	Single character field
EMAIL_PERMISSION_REASON_	Text Field (to 255 chars)
EMAIL_MD5_HASH_	Text Field (to 50 chars)
EMAIL_SHA256_HASH_	Text Field (to 100 chars)
MOBILE_NUMBER_	Text Field (to 50 chars)
MOBILE_COUNTRY_	Text Field (to 25 chars)
MOBILE_PERMISSION_STATUS_	Single character field
MOBILE_DELIVERABILITY_STATUS_	Single character field
MOBILE_PERMISSION_REASON_	Text Field (to 255 chars)
POSTAL_STREET_1_	Text Field (to 255 chars)
POSTAL_STREET_2_	Text Field (to 255 chars)
CITY_	Text Field (to 50 chars)
STATE_	Text Field (to 50 chars)
POSTAL_CODE_	Text Field (to 25 chars)
COUNTRY_	Text Field (to 50 chars)
POSTAL_PERMISSION_STATUS_	Single character field
POSTAL_DELIVERABILITY_STATUS_	Single character field
POSTAL_PERMISSION_REASON_	Text Field (to 255 chars)
CREATED_DATE_	Time Stamp Field (date + time)
MODIFIED_DATE_	Time Stamp Field (date + time)
Custom Fields	

CITY FULL\_NAME Text Field (to 100 chars) Text Field (to 100 chars)

#### Create PET from profile list page.

fbla_	list			Cha	nge List: fbla_list		Create New List	
	List Inform	ation						
	st Health				Last File Load:Feb 2	23, 2021 05:34 AM		
Vie	ew: Email	Mobile   Print		ist refresh: Jan 07, 2021 01:46 AM 🔄	Import Data	Change Schema		
	Ont-In	Deliverable	Undeliverable	Total	View Import History View Properties	Access Control Create App Channe	l List	
1								
	Create Pro	ofile Extension			?	Brand		
	Select the r	method to create a new prof	ile extension.					
Filt	Choos	se a method						
		Table with Data Upload a File			it All		Reset Submit	
F	III (	Empty Table Specify Fields						Create Profile Extension
Nar						Created date	Expiration Date	List Type
Sky						Dec 03, 2019 23:45	:31	List
0.51						Dec 02, 2010 22:45	.04	Link

#### Format of sample PET

It should have valid extraction key from profile list.

Properties	
Created by admin@qa	52 on Dec 03, 2019 11:45 PM
Name:	SkywalkerLeadsPet
Folder:	FBLA Test
List:	fbla_list
Schema	
RIID_	Integer Field
FIRST_NAME	Text Field (to 100 chars)
LAST_NAME	Text Field (to 100 chars)
CITY	Text Field (to 100 chars)
CREATED_DATE_	Time Stamp Field (date + time)
MODIFIED_DATE_	Time Stamp Field (date + time)
Key Fields	
Data Extraction:	RIID_

#### **Create Supplemental Table:**



Table should have valid extraction key from the profile list. Supplemental Table and PET should not have duplicate column.

Name:	Sup Table
Folder:	FBLA Test
Schema	
FULL_NAME	Text Field (to 500 chars)
FATHER_NAME	Text Field (to 500 chars)
MOTHER_NAME	Text Field (to 500 chars)
CREATED_DATE_	Time Stamp Field (date + time)
MODIFIED_DATE_	Time Stamp Field (date + time)
Key Fields	
Data Extraction:	FULL_NAME
Table Primary Key F	ields
Primary Key:	FULL_NAME

#### Step 2: Create the HTML document to use in Form

Upload the HTML document that will be used to create form in Content library from hamburger menu.

The document should have <form> ...</form> and table column should be with in form tag. The table column should match how it was created in List/PET/Supplemental table.



Step 3: Create the Responsys Form

Form Summary	Form Name Define the gener	al characteristics	of this form.				
Name • Prefill Data List Personalization Data	Name:	Facebook Lead Names cannot I A-Z a-z 0-9 spa	Ads Form be longer than 150 ce ! - = @ _ [ ] { }	haracters and can inc	lude only these chara	acters:	
• Message Form Document Dynamic Content	Folder: Description:	(auto-assign) This FORM will	✓ be used to capture	email address, first,			
Form Rules Auto-close Options Defaults & Variables		last hane and	city name from a Pa	LEDOOK HUSLED AU.			
Deploy					$\sim$		
	Paciniant Locale	u Epolish					
	Recipient Locale	:: English					

#### Step 4: Choose the table and the primary key to handle incoming data

In the Opt-in/Opt-out Status Values section, populate the fields with the expected incoming values from your form. If the form does not have incoming Opt-in/Opt-out Status values, then set the opt-in value to "I" and opt-out value to "O".

Similarly, in the Email Format Values section, populate the fields with the expected incoming values from your form. If the form does not have incoming Email Format values, then set the HTML value to "H" and Text value to "T".

Back Next	Select a List
Form Summary	Select the list to use for pre-filling the form and for collecting form submissions.
Name	List: RESPONSYSAPPCLOUD_LIST V
Prefill Data	
List	List Data Handling Rules
Message	Match form submits to a customer record using one of the following:
Form Document	Hatch form submits to a customer record using the or the following.
Dynamic Content	● EMAIL_ADDRESS_ ✓
Settings	
Form Rules	○Select field v andSelect field v
Defaults & Variables	If there is a match
Deploy	De pot undate a record (follow up campaigns will not be cont)
	Do not update a record (follow-up campaigns will not be sent)
	O Di NC Cleate new rectif (follow-up campaigns win not be sent)  Default permission for the newly added channels:     Opt Out     Opt In
	Opt-in/Opt-out Status Values (Email, Mobile, and Postal)
	In submitted form data, what value represents opt-in status?
	In submitted form data, what value represents ont-out status?
	Email Format Values
	All incoming values to the EMAIL_FORMAT_ field will be translated to "H" for HTML format and "T" for Text format In submitted form data, what value represents HTML?
	In submitted form data, what value represents Text?

**Step 5: Choose the personalization data:** 



Step 6: Choose the HTML file that has the FORM fields aligned with the Facebook form used for data collection.

Note the following:

- The Oracle Responsys form will not be displayed to the user or used to directly capture information. It is used to post content passed from the Facebook form into the Responsys account by way of a form post.
- For the integration to work correctly, both the Facebook lead form and the Oracle Responsys Contact List must have matching fields. We may use the document that is uploaded via content library.

For example, if your Oracle Responsys Contact List uses EMAIL\_ADDRESS\_, the Facebook form must also include an EMAIL\_ADDRESS\_ field. If your Responsys Contact List uses FIRST\_NAME, the Facebook form must also have a FIRST\_NAME field.

If your Facebook form has fields that do not match exactly to a Responsys Contact List, the integration will not work, and the form data will not be posted to the Responsys Contact List.

	Back Net: Form Summary Name Prefil Data Lit Personalization Data Hessage Form Occument Prom Rules Auto-doce Options Deploy	HTML Documents	HTML Document Clear
--	--	----------------	---------------------

#### Step 7: Complete all remaining steps with defaults and Publish the FORM.

- a. Define a default form rule. A default is required to complete a form but has no bearing on the integration itself.
- b. No other options need to be set beyond the defaults

## Step 8: Once the FORM is active, go back into the FORM dashboard and select FORM Usage:

Form Summary	Summary
Prefill Data	Description: This FORM will be used to capture email address, first, last name and city name from a Facebook host
Message	Recipient Locale: English (UTF-8)
Settings	
Deploy     1. Preview     2. Form Usage     3. Live Report     4. Close (Currently     Enabled)	Form Components         Form Document:         Prefill List:         Pynamic Content:         no
	Form Actions

**Step 9:** Use the 'Form action URL', '\_ri\_', '\_di\_' and '\_ei\_' parameter to <u>construct</u> your Form URL.



Using the example above, your **FORM URL** would be:

http://sns6.rsys5.net/pub/rf?<mark>\_ri\_=</mark>

X0Gzc2X%3DYQpglLjHJlYQGjYv92YFzcJgOFzfzfCNCP7s8E3zchoTLzbzbzdanVwjpnpgHlpgne HmgJoXX0Gzc2X%3DYQpglLjHJlYQGnPq2SCGc5l6cYwL9nzcrUIAAGzdeu5zckzbzdf&\_ei\_=616 8bb2c-a070-484a-98ad-f56ded774415&\_di\_=f7471bc0-44a3-4765-bf85-977d9c53f3e0

That is Form hostname+?\_ri\_+"value"+ &+\_di\_+"value" +&+\_ei\_+"value"

## Step 10: Create your Facebook Page and obtain the Page ID by following steps outlined below:

- a. Login to <u>https://www.facebook.com/</u> using your Facebook username and password.
- b. Create a page from home page-> left panel, you will see pages, click "Create New Page"

•••• See All Pages	
+ Create New Page	

c. Create New Page, with valid category.



d. In the Facebook Page, click on 'Publishing Tools'.

On the left-hand side, click on 'Lead Adverts Forms' and then click 'Create'.

Skywalker Computers	(	۹.	Orcle I	Home Fin	ıd Friends	R 🖬 6	) 🗎 🖛 🔻
Page Messages Notifications 1	Insights Publishin	g Tools				Settings	Help •
Posts Published Posts	<ul> <li>Leads will be available</li> </ul>	ilable for downlo	oad for up to 90	) days from	the time they	are submitted	l by a user. Help Centre
Scheduled Posts Drafts Expiring Posts	Forms Library	Q Actions -					+ Create
Videos	Name	Locale	Created		Leads Count	Leads	
Video library	Profile Update (Preview)	English (US)	25 May 2016 at	t 17:00	0	Download	
▼ Lead Adverts Forms Forms Library	Profile (Preview)	English (US)	25 May 2016 at	t 16:41	0	Download	

#### e. Enter details as below

1	Ads Lead Builder	×
D	Preview your Form	Edit Back Next
	This form preview is an approximation and does not reflect how an actual form will appear to users.	
ł	Form Details // Name	
	Profile Update	Email
	English (US)	Full Name
1		
r		
f.		
		Nothing you share will be posted on Facebook. This info is sent to Forms Library.
g.		Next
Oracle Re	Back	Cancel Create Form

	Skywalker Computers	×
	Placeholder	
First name	Orcle	
Last name	MCloud	
Email	responsys.fbtest@gmail.com	
City	Bangalore	
By clicking Submit, you agre it according to their privacy p including to auto-fill forms fo	e to send your info to Skywalker Computers who agrees to us policy. Facebook will also use it subject to our Data Policy, r ads. <u>Facebook Data Policy Privacy Policy</u>	8
	Cancel	ıbmit

#### Step 11: Create a MOS ticket to request that FBLA be configured for the account

This ticket MUST have the following three pieces of information:

- a. Account Name
- b. FORM ID which you have noted in Step 7e described above.
- c. FORM URL which have created in Step 6 above.

Support will use this information to complete the configuration of the feature. Once done, the MOS ticket will be updated.

#### Step 12: Register your Facebook pages with the Lead Ads app.

a. Once you get confirmation that your request has been implemented, log in to https://fbleadads.responsys.net/subscribepage/ and follow instructions on the screen.

Note: Only the Users with Admin Access can Register/Unregister a page to FB. Users with normal user access cannot perform the registering action. Please contact Responsys FBLA Team for more details.



b. Once you login you will see this additional information:

<ul> <li>After successfully logging in to your company's Facebook account, its available Facebook pages will be displayed below.</li> </ul>	
<ul> <li>Click on each of the pages you'd like register with the Facebook Lead Ads app.</li> </ul>	
<ul> <li>Once registered, data submitted from the Facebook forms associated with these pages will be recorded in your account.</li> </ul>	
Available Facebook Pages	
customer facebook page 1 Register page	
Customer facebook page 2 Unregister page	

Once you register the Page, the setup is complete!

### Testing

Facebook provides a Lead Ads testing tool to make it easy to check that you've configured your Forms correctly. The testing tool is found at

<u>https://developers.facebook.com/tools/lead-ads-testing</u>. Before you can begin testing, you will need to complete all Configuration steps as outlined above.

#### **Testing Instructions**

1. Log in to your company's Facebook account.

- 2. Make sure your pages have been registered with the Responsys Lead Ads app (see Step 9 in the Configuration section above.)
- 3. Go to <u>https://developers.facebook.com/tools/lead-ads-testing</u>.
- 4. Select the Page and associated Form you want to test

, agoi	P-DC CARL CHARTER OF	National Franker
Form:	icecream_form <del>•</del>	Preview form
	You can create one lea	ad per form. You'll need to delete an existing lead in order to create a new one

- 5. Click the 'Preview form' link to display your FB form
- 6. Complete the form and submit it
- 7. After submitting the form, click the Track Status button to see the status of your form Submit. If the status is 'Pending', wait about 10 seconds and click the Track Status button again. Repeat until the status changes and there is a corresponding HTTP Code and Payload. If the form submission was successful, the Status will be 'success', the HTTP code will be '200' and you will see the Payload passed on the form submission.

ealtime Update ID	App ID	Subscribed Field	Status	HTTP Code	Payload
642520330374812	1201508788525829	leadgen	success	200	{"entry":{{"changes":{{"field":"leadgen","value":

8. Login to your Responsys account and verify the record was added to the relevant tables.