

Social Connected 1.3 for Sitecore CMS 6.6 Administrator's and Developer's Guide

A Quick Start Guide and Configuration Reference for Administrators and Developers



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Chapter 1

Introduction

This document is designed for Sitecore administrators and developers. It contains information about how to set up, configure, and tune the module.

The document contains the following chapters:

- Chapter 1 Introduction
 An introduction to the Sitecore Social Connected module.
- Chapter 2 Social Connector Instructions for administrators about configuring and using the Social Connector.
- Chapter 3 Posting Messages to Social Networks when a Goal is Triggered Instructions for administrators how to configure Goal Messaging.
- Chapter 4 Posting Content Messages to Social Networks Instructions for administrators how to configure Content Messaging.
- Chapter 5 Analytics Features A description of the analytics features in the module.
- Chapter 6 Developer's Notes Information about module pipelines and processors.
- Chapter 7 Tips and Tricks Tips and tricks for administrators.



1.1 Features

The Sitecore Social Connected module provides the following features:

Social Connector

The Social Connector lets website visitors log in to the website using the credentials from their social network accounts. The website then receives information about the visitor from their social network profile. You can also use the Social Connector to personalize the website.

Posting Messages to Social Networks when a Goal is Triggered

This feature works with the Social Connector and posts messages to the visitor's wall in the social network every time they trigger a goal on the website.

Posting Content Messages to Social Networks

This feature posts messages about Sitecore content automatically to the walls of the selected social network accounts when you publish Sitecore items. You can also post messages manually without publishing Sitecore items.

Analytics

You can place **Like** and **Tweet** buttons on a web page as Sitecore controls and then use Sitecore analytics to track the activity of website visitors.

Note

In this document, the phrase "post message" means to send a message to a social network and put it on the Facebook wall or the Twitter timeline.



1.2 Architectural Requirements and Limitations

The Sitecore Social Connected module cooperates with third party products and services. You should therefore pay special attention to the requirements and limitations related to your Sitecore solution.

Internet Access to Social Services

In a distributed Sitecore solution that is built on one or more environments, such as a Content Management server and one or more Content Delivery servers, make sure the servers have access to the social network services over the Internet.

Configuring Security

The Social Connector creates a new Sitecore user the first time a website visitor uses their social network credentials to log in to the website. If the Sitecore solution is built on one or more environments, such as a Content Management server and one or more Content Delivery servers, make sure you configure security according to the Sitecore recommendations. Security is an inseparable part of the Core database that must be shared between all the Content Management and Content Delivery servers if you want to keep security accounts synchronized. If the Core database cannot be shared between the servers, use database replication instead.

For more information about configuring security in multi-environment solutions, see the *Sitecore Scaling Guide*, the section *Isolating Instances within the CM and CD Environments* and the section *How to:* Address Security Caching Clearing.



Chapter 2

Social Connector

Social Connector is a feature of the Sitecore Social Connected module that lets website visitors log in to the website with their social network credentials. Sitecore does not get access to the visitor's credentials; it uses the API to communicate with the social network.

When a website visitor logs in with their social network credentials, the Sitecore Social Connected module receives all the information from the visitor's profile that the visitor has allowed the social network to share. This information is saved in the user profile, which Sitecore creates automatically in the *extranet* domain.

On the one hand, Social Connector lets website visitors log in to the website with their social network credentials and thereby avoid the registration process. On the other hand, Social Connector lets the website collect more information about a website visitor from their social network profile.

This chapter contains the following sections:

- Configuration
- Configuring Access to Social Networks
- Configuring Access to the Visitor's Profile Information
- Placing Social Connector Controls on a Web Page
- Mapping the Fields in the Visitor Profile
- Synchronizing User Information
- Disabling the Attachment of a Visitor's Social Network Accounts to their User Profile



2.1 Configuration

Before we explain how to configure Social Connector, we will describe a use case in which a website visitor logs in to the website with social network credentials.

2.1.1 Use Case

In this example, a website visitor uses their Facebook credentials to log in to the website.

To connect with Facebook credentials:

- 1. A website visitor navigates to the website:
- 2. To log in to the website with their social network credentials, the visitor clicks the social network icon. The module redirects them to the social network login page.



3. On the login page, the visitor enters their credentials. The social network asks the visitor to grant the web application of the website access to the visitor's profile information.

	SC Social ADS Test Vou are now logged in		
-	To enhance your experience, SC Social ADS Test would also lik	e permission to:	
	Access posts in your News Feed		×
	Access your data any time SC Sodal ADS Test may access your data when you a	e not using the application	×
			Allow Don't Allow
_			

If the visitor does not grant access to their profile information, the system redirects them back to the website. The visitor still has to log in to the website.

If the visitor grants access to their profile information, the system redirects them back to the website where they are already logged in. Sitecore creates a new user profile or updates the information in the existing user profile.

4. The visitor can attach one more social network account to their profile on the website. To attach one more social network account, the visitor clicks the appropriate social network icon and grants access to the web application.

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2.1.2 Configuration Actions

To configure Social Connector:

- 1. Create a web application for each social network and a corresponding Sitecore item. This web application will concatenate the module with the social network. For more information about configuring a web application, see the section *Configuring Access to Social Networks*.
- 2. Configure an access request for the information that the web application will receive from the website visitor's profile on the social network. For more information about configuring an access request, see the section *Configuring Access to the Visitor's Profile Information*.
- 3. Configure and place log in controls for the social networks on the web page. For more information about how to place log in controls, see the section, *Placing Social Connector Controls on a Web Page*.
- 4. Reduce the time that the Social Connector spends to find an existing user when the visitor logs in to the website. Add the following string to the web.config file, to the configuration/system.web/profile/properties section:

<add type="System.String" name="SC_SocialNetworkId" />

After you have performed the obligatory configuration actions, you can:

 Arrange a Sitecore scheduled task to periodically update the user profile with information from the social network.

For more information about how to schedule a Sitecore task, see the section *Synchronizing User Information*.

• Disable attaching the visitor's social network accounts to their user profile.

For more information about how to disable attaching visitor's social network accounts, see the section *Disabling the Attachment of a Visitor's Social Network Accounts to their User* Profile.



2.2 Configuring Access to Social Networks

When interacting with social networks, Sitecore Social Connector uses the API of the social networks or the OAuth protocol for Google+. You must create a web application for every social network that you want the module to communicate with. You must also create a Sitecore item for each web application.

In a multisite scenario, you should create a web application for each website.

2.2.1 Creating and Configuring a Facebook Web Application

To create and configure a web application for Facebook:

1. Go to <u>https://developers.facebook.com/apps</u> and create a new web application.

facebook DEVELOPERS	Documentation Support Blog Apps	Search Documentation / Apps
Search Apps	Apps	✓ Edit App + Create New App
Recently Viewed No Apps Found	Welcome to the Developer App. Learn how to build a social experience by referring to the documentatic above.	on below, or create an app by clicking on the 'Create New App' button
		ws you to create a more personalized, social experience using and simplifies your registration and sign-in process using Login

For more information about how to create a new web application, go to <u>https://developers.facebook.com/docs/guides/canvas/</u>

2. In the web application, on the **Basic** settings page, fill in all the required fields.



3. In the Select how your app integrates with Facebook section, select Website and in the Site URL field, enter the URL of the web page where you want to place the login controls.

Settings >	Apps > Norman Furniture	e ⊳ Basic
Basic		
Permissions		
Payments	Norman Fur	niture
Realtime Updates API	App ID: 35	51620224868989
Advanced	App Secret: 48	353aa241849661bb35b52f33b2a805c (reset)
App Details		
Localize	Basic Info	
Open Graph	Display Name: [?]	Norman Furniture
Roles	Namespace: [?]	Norman Furniture
Insights	Contact Email: (?)	117345213541640@pdgfw.com
	App Domains: [?]	Enter your site domains and press enter
	Category: [?]	Other Choose a sub-category 💌
Related links	Hosting URL: [?]	You have not generated a URL through one of our partners (Get one)
Use Debug Tool	Sandbox Mode: [?]	© Enabled
Use Graph API Explorer See App Timeline View	Select how your app integrates wit	:h Facebook
Promote with an Ad		×
Delete App	✓ Website with Facebook Login	
	Site URL: [?]	http://hostname.com
		Use my app inside Facebook.com.
	🔗 Mobile Web	Bookmark my web app on Facebook mobile.
	🔗 Native i05 App	Publish from my iOS app to Facebook.
	✓ Native Android App	Publish from my Android app to Facebook.
	🗇 Page Tab	Build a custom tab for Facebook Pages.
		Save Changes

4. In Sitecore, in the **Content Editor**, navigate to the

 $\verb|sitecore/system/social/applications/default\ folder.$

5. In this folder, create an item based on the

sitecore/templates/system/social/application template.

Important

The Default folder must contain only one item for the corresponding social network. If you are going to use several web applications for one social network, create the new items in the sitecore/system/social/applications folder.



6. In the new item, enter the appropriate information:

Edit - Insert ©	Duplicate Move To Delete	Paste Cut Cipboard	T Rename Display Name Rename	 ▲ Up ◆ First ◆ Down ♦ Last Sorting © 	
ch 🔍 🗸	Content		rechance		
istecore if the state of the state	Norman Faceb	ook Connect	or		
E Cayout	G Quick Info				
🗉 🔤 Media Library	Item ID: {D93839D3-11	72-4E24-B11D-47C05	2159064}		
🖃 🔢 System	Item Name: Norman Facebo	ok Connector			
💋 Aliases	Item Path: /sitecore/syste	m/Social/Applications/	Norman Facebook Co	nnector	
Dictionary Includes	Template: /sitecore/templ	ates/System/Social/A	polication - {8015884	4-6D 50-4C 56-980B-4354	774458093
 Languages Marketing Center 	Created From: [unknown]		(001000)		
Modules	Item Owner: sitecore\admin				
I Droxies					
🗉 🐚 Publishing targets	📰 Data				
🗉 📓 Settings	ApplicationId:				
🖃 💽 Social	229297457113054				
Accounts					
 Applications <u> ¹ ¹ </u>	ApplicationSecret:				
Default Bracebook Default Application	5573ffa292097dd16at	ofb3ca939843d6	AAADQi3l6pZCQ	BAFTDK7oYaMZC	UKhjZCsOJzq64
Twitter Default Application					
Norman Facebook Connector	Network:				
Norman Twitter Connector	Networks/Facebook				
🗉 🧐 Messages					
Metworks	Second Advanced				
🗉 🚫 Tasks	Appearance				

Field	Value
ApplicationId	The App ID value of the web application
ApplicationSecret	The App Secret value of the web application
Network	Facebook

2.2.2 Creating and Configuring a Twitter Web Application

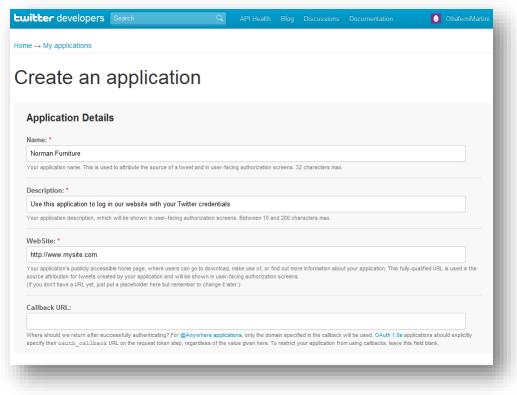
To create and configure a web application for Twitter:

1. Go to <u>https://dev.twitter.com/apps</u> and create a new web application.

twitter developers Search	Q	API Health	Blog	Discussions	Documentation	ObafemiMartini
Home						
My applications						Create a new application
	-		-			_

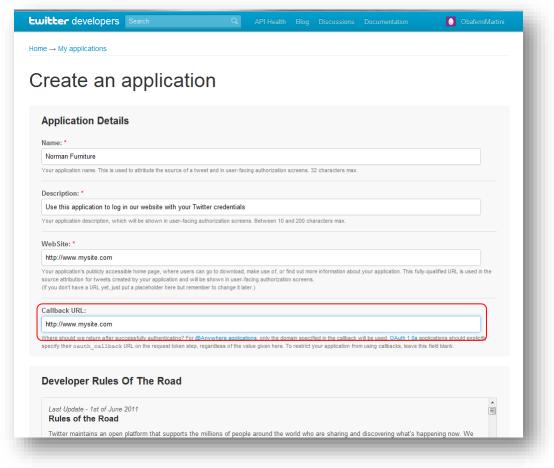


2. In the web application, in the Application details section, fill in all the required fields.





3. In the **Callback URL** field, enter the URL of the webpage where you want to place the login controls.



4. In Sitecore, in the **Content Editor**, navigate to the

sitecore/system/social/applications/default folder.

5. In this folder, create an item based on the

sitecore/templates/system/social/application template.

Important

The Default folder must contain only one item for the corresponding social network. If you are going to use several web applications for one social network, create the new items in the sitecore/system/social/applications folder.



6. In the new item, enter the appropriate information:

Edit ~ Insert from Template (2 of 2) Edit ~ Insert from Template (2 of 2)	Operations Operati
، 🔍 ۲	Content
📄 sitecore 🖃 🍓 Content	Korman Twitter Connector
🗉 🍙 Home	🕒 Quick Info
E Cayout	The ID. for an
Media Library System	Item ID: {F904510C-1172-4690-AEB9-AEF709D330FA}
Aliases	Item Name: Norman Twitter Connector
Solutionary	Item Path: /sitecore/system/Social/Applications/Norman Twitter Connector
Languages	Template: /sitecore/templates/System/Social/Application - {8015BB44-6D50-4C56-980B-435A77AA5B09}
🗉 🤢 Marketing Center	Created From: [unknown]
🔘 Modules	Item Owner: sitecore\admin
🗉 📁 Proxies	
Publishing targets	E Data
🗉 🔯 Settings	ApplicationId:
Social Accounts	E8awCxzyUA8dBQ8LEDsxw
Accounts Accounts Second Se	
Applications	ApplicationSecret:
Facebook Default Application	Z8mTLU2VdY3LsNwv1nqHcbHzfK3C1D4v0zzZGjCUc4
Twitter Default Application	Network:
Norman Facebook Connector	Network: Networks/Twitter
Norman Twitter Connector	(inclusion in the inclusion in the incle
🗉 🧔 Messages	
Networks	Second Se
🗉 🚫 Tasks	Appearance

Field	Value
ApplicationId	The Consumer Key value of the web application
ApplicationSecret	The Consumer Secret value of the web application
Network	Twitter

2.2.3 Creating and Configuring a LinkedIn Web Application

To create and configure a web application for LinkedIn:

1. Go to <u>https://www.linkedin.com/secure/developer</u> and create a new web application.

List of Applications	1
Company	Application Name
Norman Furniture	Norman Furniture
« Back to LinkedIn Developer Network	
inkedin.com Home <u>About Blog</u> <u>Careers</u> <u>Advertising</u> <u>Recruiting Solutions</u> <u>Tools</u> <u>Developers</u> opyright⊜2011 Linkedin Corporation. All rights reserved. <u>User Agreement</u> <u>Privacy Policy</u> <u>Copyright Policy</u>	Upgrade Your Account



- 2. In the web application, fill in all the required fields.
- 3. In the **OAuth User Agreement** section, in the **OAuth Redirect URL** field, enter the URL of the web page where you want to place the login controls.

Interface Language:	
	E French
	German
	🗖 Italian
	Portuguese -
	Enter all the languages for your application interface. LinkedIn uses this information to better provide you support.
Programming Tools:	PHP ^
r rogramming roots.	C++
	C#
	Java
	ColdFusion -
	Enter all the development languages and tools you use. LinkedIn uses this information to provide you better support.
Contact Info	
* Developer Contact Email:	dev nf@nf.com
* Phone:	+380 94 4578984
Current Contrat Frankli	
Support Contact Email:	
Phone:	
Business Contact Email:	
Phone:	
OAuth User Agreement	
OAuth Redirect URL:	http://www.mysite.com
	URL to return users to your app after they grant access. Only used if you do not pass in a redirect URL when you send the user to grant
	access.
* Agreement Language:	English
	Select the display language of the user agreement screen. Browser Locale Setting is recommended.
Term of Service	
**	
*Agree:	I have read and agree to the Linkedin API Terms of Use.
	Add Application or Cancel
	* Indicates required information
	indicated required information

4. In Sitecore, in the **Content Editor**, navigate to the

sitecore/system/social/applications/default folder.

5. In this folder, create an item based on the

sitecore/templates/system/social/application template.

Important

The Default folder must contain only one item for the corresponding social network. If you are going to use several web applications for one social network, create the new items in the sitecore/system/social/applications folder.



6. In the new item, enter the appropriate information:

Home Navigate Review Analyze Ruk Application (1 of 2) Bet Edition Insert from Template (2 of 2) Insert fo	olsh Versions Configure Presentation Security View My Toolbar Duplicate Move To Delete Operations Operations Duplicate Security View My Toolbar III Rename Duplicate Security View My Toolbar III Rename Duplicate Security View My Toolbar III Rename Duplicate Security View My Toolbar
arch 🔍 🔍 🔻	Content
isitecore definition	🔅 Norman LinkedIn Connector
🗉 🙆 Home	9 Quick Info
🗷 🛅 Layout 🗷 🔤 Media Library	Item ID: {78815A15-3E10-4172-A579-1BEB6876EC86}
🖃 👹 System	Item Name: Norman LinkedIn Connector
🕼 Aliases 🗷 🥗 Dictionary	Item Path: /sitecore/system/Social/Applications/Norman LinkedIn Connector
 Dictionary Languages 	Template: /sitecore/templates/System/Social/Application - {8015BB44-6D50-4C56-980B-435A77AA5B09}
	Created From: [unknown]
Modules	Item Owner: sitecore admin
🗉 🧔 Proxies	
🗉 🕥 Publishing targets	E Data
🗉 📓 Settings	ApplicationId:
Social	chy1yio6c5wy
Accounts Annications	
	ApplicationSecret:
Vorman Facebook Connector	qpWyWHNvCKNpg4rW
Norman LinkedIn Connector	
Norman Twitter Connector	Network: Networks/Linked In
🗉 🧔 Messages	
Networks	
🗉 🚫 Tasks	👌 Advanced

Field	Value
ApplicationId	The API Key value of the web application
ApplicationSecret	The Secret Key value of the web application
Network	LinkedIn



2.2.4 Creating and Configuring a Google+ Web Application

To create and configure a web application for Google+:

1. Go to https://code.google.com/apis/console and create a new project:

Google apis	Start using the Google APIs console to manage your API usage
	Creating an APIs project will let you: 9. Use Google APIs beyond anonymous limits. 9. Monitor API usage and control API access. 9. Share API management with a team. Create project
	© 2011 Google - <u>Code Home</u> - <u>Privacy Policy</u>

2. On the All Services page, expand API Project menu and click Create.

All (29) Active (0) Inactive (29)							
Rename Delete	All services						
cent projects	Select services for the project.		C ()	N 4			
No recent projects	Service	~	Status	Notes			
ther projects	AdSense Management API	0	OFF	Courtesy limit: 10,000 queries/day			
Open Create	Analytics API	0	OFF	Courtesy limit: 50,000 queries/day			
Undelete	Audit API	0	OFF	Courtesy limit: 10,000 queries/day			
	Blogger API	0	Request access	Courtesy limit: 1,000 queries/day			
	U Books API	0	OFF	Courtesy limit: 1,000 queries/day			
	3 Calendar API	0	OFF	Courtesy limit: 10,000 queries/day			
	Custom Search API	0	OFF	Pricing • Courtesy limit: 100 queries/day			
	Freebase API	0	OFF	Courtesy limit: 100,000 queries/day			
	Google Cloud SQL	0	Request access				
	Google Cloud Storage	0	OFF	Pricing			
	5 Google Maps API v2	0	OFF	Pricing • Courtesy limit: 25,000 queries/day			
	5 Google Maps API v3	0	OFF	Pricing • Courtesy limit: 25,000 queries/day			
	Google+ API	0	OFF	Courtesy limit: 1,000 queries/day			
	Google+ Hangouts API	0	OFF				



- 3. In the Create Project dialog box, enter the name of the project and then click Create Project.
- 4. On the All Services page, set Google+ API to On.



- 5. In the left-hand menu, click **API Access**.
- 6. On the API Access page, click Create an OAuth 2.0 client ID.

Norman Furniture 🔹 🔻	API Access				
Overview	API ACCESS To prevent abuse, Google places limits on API requests. Using a valid OAuth token or API key allow				
Services					
Team	Authorized API Access				
API Access	OAuth 2.0 allows users to share specific data with you (for example,				
Reports	contact lists) while keeping their usernames, passwords, and other				
Quotas	information private. Learn more				
	Simple API Access Use API keys to identify your project when you do not need to access user data. Learn more				
	Key for browser apps (with referers)				

- 7. In the **Create Client ID** dialog box, on the **Branding Information** page, enter the name in the **Product Name** field and click **Next**.
- 8. In the **Create Client ID** dialog box, on the **Client ID Settings** page, select **Web Application** type. Skip the website field.
- 9. In the Create Client ID dialog box, on the Client ID Settings page, click Create Client ID.
- 10. On the API Access page, in the Client ID for web application section, click Edit Settings.
- 11. In the Edit Client Settings dialog box, enter the following URLs in the Authorized Redirect URLs field:

http://hostname/layouts/system/Social/Connector/SocialLogin.ashx?type=google_access http://hostname/layouts/system/Social/Connector/SocialLogin.ashx?type=google_add http://hostname/layouts/system/Social/Connector/SocialLogin.ashx?type=access where hostname is the name of the host that is running the website.

12. In the Edit Client Settings dialog box, click Update.



13. On the API Access page, save the values of the Client ID and Client secret fields.

Norman Furniture 🔹	API Access				
Overview	To prevent abuse, Google places limits on API requests. Using a valid OAuth token or API key allows you to exceed anonymous limits by connect				
Services					
Team	Authorized API Access OAuth allows users to share specific data with you (for example, contact lists) while keeping their usernames, passwords, and other information p				
API Access	or automotion and a specific data with you (to example, contact lists) while keeping their additiones, passwords, and other monitation p				
Reports	Branding information				
Quotas	The following information is shown to users whenever you request access to their private data.				
	Product name: Norman Furniture				
	Google account: obafemister@gmail.com				
	Edit branding information				
	Client ID for web applications				
	Client ID: 862916470769.apps.googleusercontent.com				
	Client secret: 3QhPH4R3veoufB0kH8mD3kIC				
	Redirect URIs: http://hostname/layouts/system/Social/Connector/SocialLogin.ashx?type=google_access http://hostname/layouts/system/Social/Connector/SocialLogin.ashx?type=google_add				
	JavaScript origins: none				
	Create another client ID				

14. In Sitecore, in the **Content Editor**, navigate to the

sitecore/system/social/applications/default folder.

15. In this folder, create an item based on the

sitecore/templates/system/social/application template.

Important

The Default folder must contain only one item for the corresponding social network. If you are going to use several web applications for one social network, create the new items in the sitecore/system/social/applications folder.



16. In the new item, enter the appropriate information:

Home Navigate Review Analyze Public Bave Edit v • Application (1 of 2) (2 of 2) vert from Template (2 of 2) vert for Insert for Insert for (2 of 2) vert	sh Versions Configure Presentation Security Wew My Toobar
Search Search Sear	Context Current Cu
Applications A	ApplicationSecret: tLV-J-ctDAsg3zsmzmi38sHH Network: Networks/Google+ Advanced Applearance

Field	Value
ApplicationId	The Client ID value of the web application
ApplicationSecret	The Client secret value of the web application
Network	Google+



2.3 Configuring Access to the Visitor's Profile Information

When a website visitor logs in to the website with their social network credentials, the module redirects them to the login page of the social network. On that page, the visitor enters their credentials and the web application asks the visitor to grant it access to their profile information.

SC Social ADS Test Vou are now logged in	
To enhance your experience, SC Social ADS Test would also like permission to:	
Access posts in your News Feed	×
Access your data any time SC Social ADS Test may access your data when you are not using the application	×

You can configure the exact information that the web application will ask for.

2.3.1 Web Application Access Request for Facebook, LinkedIn and Google+

For Facebook, LinkedIn, and Google+ you configure the access request in the Sitecore.social.profilemapping.network name.config file.

To configure the fields that the web application can access:

1. Open the

```
[website_root]\app_config\include\sitecore.social.profilemapping.networ
k name.config file.
```

- 2. In the configuration section for the social network, in the configuration section for the field that you want the web application to use, set the field enabled parameter to true.
- 3. If the field is private, you must set its permission parameter according to the official social network documentation.

For example, to get access to the **Groups'** field on Facebook, the field section in the Sitecore.social.profilemapping.Facebook.config file should look like this:

```
<!-- 'Groups' field. -->
<!-- The Groups that the user belongs to. -->
<field enabled="true" originalKey="" sitecoreKey="fb_groups" permission="user_groups"
access="/me/groups" text="Groups" />
```

Note

At the moment, the Google+ API doesn't allow you to access some user profile fields such as **Formatted name**, **Family name**, **Given name**, and so on. This is why those fields are disabled in the Sitecore.Social.ProfileMapping.GooglePlus.config file by default.



For more information about user profile fields, see the official documentation of the social network:

- For Facebook documentation, go to http://developers.facebook.com/docs/reference/api/user/.
- For LinkedIn documentation, go to https://developer.linkedin.com/documents/profile-fields.
- For new Google+ API, go to https://developers.google.com/+/api/latest/people.

2.3.2 Twitter Web Application Access Request

For Twitter, you can configure access request on the web application page.

To configure the fields that the web application can access:

- 1. Go to <u>https://dev.twitter.com/apps</u> and then go to the web application.
- 2. On the Settings tab, in the Application Type section, select the Read and Write or Read, Write and Access direct messages check box.

Develope	ers Search	Q	API Health	Blog	Discussions	Documentation	ObafemiMar
<u> </u>							
e → My applic	cauons						
orma	an Furniture						
Unna		•					
Details S	Settings OAuth tool	@Anywhere d	omains F	Reset ke	ys Delet	е	
Applicatio	on Details						
Name: *							
Norman Furnit							
Your application na	ame. This is used to attribute the source	of a tweet and i	n user-facing auti.	horization	screens. 32 chara	acters max.	
Description: *							
Use this applic	cation to log in our website with ye	our Twitter cre	dentials				
Your application de	lescription, which will be shown in user-	facing authoriza	tion screens. Betv	ween 10 a	nd 200 character	s max.	
Website: *							
http://www.hos	stname.com						
source attribution f	publicly accessible home page, where u for tweets created by your application a a URL yet, just put a placeholder here bu	ind will be show	n in user-facing a			mation about your application	This fully-qualified URL is used in the
Applicatio							
	Change icon:						
	Maximum size of 700k. JPG, GIF, PNG.						
	Maximum Size of 700k. 3FG, Gil , FNG.						
A 12 47							
Applicatio	on Type						
Access:							
Read only	l-it-						
Read and W Read Write	and Access direct messages						
Creau, write							
What type of acce	ess does your application need? Note: @ ut our Application Permission Model.	Anywhere appli	ications require re	ad & write	access.		

3. Click Update these twitter application settings to save the changes.



For more information about the user profile fields on Twitter, see the official Twitter documentation <u>https://dev.twitter.com/docs/api/1/get/users/show</u>.



2.4 Placing Social Connector Controls on a Web Page

You can configure and place log in controls for the social networks on the website. You can find the controls in the sitecore/layout/sublayouts/social/connector folder. You can fully customize these controls (change images, texts, and so on).

Note

By default, the Social Connector controls use social web applications that are stored in the sitecore/system/social/applications/default folder

In the API, you can specify the social web application to be used by Social Connector. In the ApplicationItemId parameter, specify the ID of the Sitecore item containing social web application settings. For a sample code, see the section *Disabling the Attachment of a Visitor's Social Network Accounts to their User* Profile.



2.5 Mapping the Fields in the Visitor Profile

When a website visitor logs in to the website with their social network credentials, the module receives their visitor profile information from the social network. This information is saved in the corresponding user profile on the website. The information is stored in the *Core* database, in the <code>aspnet_profile</code> table. By default, the module saves the information from the social network in the fields with the corresponding prefixes. For example, fb is a prefix for Facebook fields. You can change the field mappings in the <code>sitecore.social.profilemapping.network</code> name.config file.

To change the field mappings between a social network visitor profile and the user profile on the website:

- 1. Open the
 [website_root]\app_config\include\sitecore.social.profilemapping.networ
 k name.config file.
- 2. In the configuration section for the social network, set the following fields according to the official social network API documentation:

Field	Description
originalKey	All social networks use this field.
Permission	Facebook uses this field.
Access	Facebook uses this field.
xmlPath	LinkedIn uses this field.
text	All social networks use this field.

3. In the configuration section for the social network, set the **sitecoreKey** field to the name of the Sitecore database field.

Important

We recommend that you do not change the **sitecoreKey** field values.

For more information about the user profile fields, see the official documentation of the social network:

- For Facebook documentation, go to http://developers.facebook.com/docs/reference/api/user/.
- For LinkedIn documentation, go to https://developer.linkedin.com/documents/profile-fields.
- For new Google+ API, go to <u>https://developers.google.com/+/api/latest/people</u>.
- For Twitter documentation, go to <u>https://dev.twitter.com/docs/api/1/get/users/show</u>.

For more information about the **originalKey** field for Twitter, see the properties of the **TwitterUser** class in the **Twitterizer 2** library.

For more information about the **originalKey** field for Google+, see the **WellKnownAttribute** class in the **DotNetOpenAuth** library.

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2.6 Synchronizing User Information

When a website visitor logs in to the website, Sitecore Connector receives and saves all the user profile information from the social network that the visitor has allowed the network to share. This information is saved to the user profile.

You can configure whether or not the module should update a user's profile every time they log in. In the Sitecore.social.config file, use the following parameters:

- Social.ProfileUpdating.EnableProfileUpdating enables or disables updating user profiles on log in;
- Social.ProfileUpdating.DaysUserProfileExpiration the number of days after which the module should update the profile of a user when they log in.

The module receives user profile information in two stages:

- When the website visitor enters their social network credentials, the module receives basic data from the social network: ID, email, application key, application secret, access token, and access token secret. The module uses this information to identify the visitor.
- When the visitor is identified, the module receives all the information from the user profile that the visitor has allowed to be shared. As a result this information comes later than basic data. But you can configure the module so that it receives all user information at the same time. For this, use the new parameter in the LoginUser and AttachUser methods. For a sample code, see the section *Disabling the Attachment of a Visitor's Social Network Accounts to their User* Profile.

To regularly update user information with the user profile data from the social network, you can use a Sitecore scheduled task. This allows you to synchronize the user information with the social network regardless of the user's activity on your website.

By default the scheduled task for synchronizing data between the users' profiles on the social networks and their profile information on your website is created but not run.

To run the scheduled task:

- In Sitecore, in the Content Editor, select the Sitecore/system/tasks/schedules/social data synchronization item.
- 2. In the Schedule field, set the schedule.

For more information about using the **Schedule** field, see the <u>Scheduled Tasks</u> article on the SDN.

Alternatively, you can set and run the scheduled task in the sitecore.social.config file:

1. In the [website_root]\app_config\include\sitecore.social.config file, in the scheduling section, set the interval value:

When the module synchronizes information, it follows these rules:

- If the field in the social network user profile has been updated, Sitecore updates this field in the user profile.
- If the field in the social network user profile has become blank, Sitecore clears this field in the user profile.



2.7 Disabling the Attachment of a Visitor's Social Network Accounts to their User Profile

By default, the Sitecore Social Connected module lets the visitor who logged in to the website with their social network account add one more social network account to their user profile. In this case, the module does not create a new account but adds the information to an existing user profile.

You can disable this functionality by editing the following API:

```
protected void FacebookLoginButtonOneClick(object sender, ImageClickEventArgs e)
{
    var connectUserManager = new ConnectUserManager();
    const bool IsAsyncProfileUpdate = true;
    const string ApplicationItemId = "<YourAppItemId>";
    if (!Sitecore.Context.User.IsAuthenticated)
    {
        connectUserManager.LoginUser("Facebook", IsAsyncProfileUpdate,
        ApplicationItemId);
        else
        {
            connectUserManager.AttachUser("Facebook", IsAsyncProfileUpdate,
        ApplicationItemId);
        }
    }
}
```



Chapter 3

Posting Messages to Social Networks when a Goal

is Triggered

The Sitecore Social Connected module can automatically post messages to Facebook and Twitter when a website visitor triggers a goal on the website.

This feature requires that you have the Digital Marketing Suite 2.0 or later is installed and that Social Connector is configured on the website.

For Facebook, you can post messages both to the visitor's wall and Facebook pages. For Twitter you can post tweets to the visitor timeline.

This chapter contains the following sections:

- Configuration
- Creating a Message
- Asking the Visitor if they Want Messages Posted Automatically
- Placing Goal Context Information in the Message Body



3.1 Configuration

The Social Connected module can post messages to social networks when a website visitor triggers a goal on the website. To enable this feature, you must configure the Social Connector because the module requires that the website visitor logs in to the website with their social network credentials.

You can use this feature to post messages to Facebook and Twitter.

Before we explain how to configure posting messages on goal triggering, we will describe a use case in which the module automatically posts messages to social networks when a website visitor uploads a new image to the website.

3.1.1 Use Case

A visitor logs in to the website with their social network credentials. When the visitor triggers a goal the module posts a message to the corresponding social network. You can configure the goal and the text used in the message.

Example:

A website visitor logs in to the website with their Facebook credentials. The visitor uploads an image *Friday Party* to the website. The *uploading an image* goal is triggered and the Social Connected module posts a message to the visitor's wall on Facebook saying that the visitor uploaded the image called *Friday Party*.

3.1.2 Configuration Actions

To configure the posting of messages when a goal is achieved:

1. Configure Social Connector.

For more information about Social Connector configuration, see the section Configuration

2. Create a goal.

For more information about configuring goals and page events, see the document <u>Marketing</u> <u>Operations Cookbook</u>, chapter *Goals, Campaigns, and Events*.

3. Create a goal message that is sent to the social network.

For more information about editing messages, see the section *Creating a Message*.

After you have configured this, you can:

 Create a UI control that asks website visitors for permission to post messages to their social networks when they trigger goals.

For more information about creating UI control, see the section *Asking the Visitor if they Want* Messages Posted Automatically.

• Create personalized messages using goal context parameters.

For more information about the usage of goal context parameters, see the section *Placing Goal Context Information in the Message* Body.

Note

The analytics features used by the Sitecore Social Connected module, such as goals, page events, and so on require Sitecore DMS 2.0.0 or later.

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3.2 Creating a Message

When you have configured Social Connector and assigned a goal to an item, you can edit the message.

Note

Twitter does not allow you to post messages with the same text more than once.

To edit the message text:

- 1. In Sitecore, in the **Marketing Center**, select the goal that you want to bind a message to. Usually, the goals are stored in the folder sitecore/system/marketing center/goals.
- 2. In the **Marketing Center**, on the **Publish** tab, click **Messages**. The **Messages** dialog box appears.

Messages Create, edit and post a message on a social network.	
These messages will be posted to the social networks when goal will be triggered.	
Select the social network where you want to create a message.	
	- 1
	- 1
Refresh	Close

- 3. In the **Messages** dialog box, click the **Create a Facebook Message** button **f** or the **Create a Twitter Message** button **2**.
- 4. In the **Facebook message** or **Twitter message** dialog box, in the **Message** field, enter the text of the message. The rest of the fields are optional.

Note

Facebook limits the message text to 63000 symbols and Twitter limits the text to 140 symbols.

Note

If you select a campaign that will be triggered when a visitor clicks the link, you must deploy this campaign in advance.

5. In the Facebook message or the Twitter message dialog box, click OK to close the dialog box.

Important

You must publish the messages that you have created for the goals before they can be posted to the social networks. You can find the messages folder in the Sitecore/system/social folder.

To put a URL in the middle of the message text, in the **Twitter message** dialog box, use the <code>\$link</code> token in the **Message** field and enter the URL in the **Link** field. This token does not work for Facebook messages in the current version of the module.

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3.3 Asking the Visitor if they Want Messages Posted Automatically

When you have configured Sitecore to post messages to the social network when a visitor achieves a goal on the website, this functionality applies to every visitor.

If you want to ask website visitors whether or not they want messages to be posted on their social network walls, you must disable sending of messages by default and create a UI control to ask the visitor what they prefer:

- 1. In the [website_root]\app_config\include\sitecore.social.config file, set the value of the Social.AllowPublishByDefault setting to false.
- 2. Use the Sitecore API to create a UI control that asks the visitor whether or not they want to allow Sitecore Social Connected to send messages to their social network walls.

Use the following methods of the

Sitecore.Social.Security.Managers.PublishPreferenceManager Class:

- o GetPreference
- o SetPreference.

For example, the following code snippet asks the current visitor to decide whether or not to post a specific message. The message is specified in the message id:

```
var manager = new Sitecore.Social.Security.Managers.PublishPreferenceManager();
var status = manager.GetPreference(id, Sitecore.Context.User);
var newstatus = status == PublishPreference.Allowed ? PublishPreference.Denied :
PublishPreference.Allowed;
manager.SetPreference(id, Sitecore.Context.User, newstatus);
```



3.4 Placing Goal Context Information in the Message Body

You can use the Sitecore API to place some of the context information about how or when a goal is achieved in a personalized message that is posted on a social network.

For example, when a website visitor uploads an image to the website and triggers the *uploading image* goal, you can transfer the name of the image as a goal parameter and then add this information as a token to the message body. Use the GoalUtil class and the RegisterEventParameters method to transfer goal parameters.

For example, the following code snippet passes a username parameter to the social publishing engine:

```
var parameters = new Dictionary<string, string>();
parameters.Add("username", Sitecore.Context.Use.Name);
GoalUtil.RegisterEventParameters("Login", parameters);
```



Chapter 4

Posting Content Messages to Social Networks

When you publish Sitecore items on the website, the Sitecore Social Connected module can post associated messages to one or more accounts in Facebook and Twitter. You can also post a message to the social network without publishing items.

This chapter contains the following sections:

- Configuration
- Configuring Access to Social Networks
- Creating an Account Item
- Creating a Message
- Tracking Statistics on a Content Message



4.1 Configuration

The Sitecore Social Connected module can post messages to social networks when you publish Sitecore items. You bind the message to the content item and the module posts this message automatically when you publish the content item. You can also post these messages manually without publishing the content items.

This feature works with Facebook and Twitter. You can post messages to a visitor's wall in Facebook and to a Facebook page. You can post messages (tweets) to the timeline of a Twitter user who used the web application to create a Twitter account.

Before we explain how to configure posting content messages, we will describe a use case in which the module automatically posts messages to social network when a new web page is published on the website.

4.1.1 Use Case

Your company produces and sells smartphones. Every time the company produces a new smartphone, a new web page is created on the website describing its features. To attract more attention to the new model you can automatically post messages to the website's wall on Facebook or to the corresponding timeline on Twitter publicizing the fact that you have unveiled a new product. This message can contain the link to the new webpage.

4.1.2 Configuration Actions

To configure posting of the content messages:

1. Create and configure a web application in the social network and create a Sitecore item for the web application. The web application will concatenate the module with the social network.

For more information about how to create and configure a web application, see the section *Configuring Access to Social Networks*.

2. Create a Sitecore item for the social network account.

For more information about how to create an account item, see the section *Creating an Account* Item.

3. Create a message and post it immediately to the social network or post it later when you publish the Sitecore item.

For more information about creating and publishing messages, see the section *Creating a Message*.

URL Generating

In a single site solution, where the Content Management and Content Delivery servers are on different domains, in the Sitecore.Social.config file, in the Social.LinkDomain attribute, specify the host name.

In a multisite solution, on the Content Management server, in the web.config file, the module uses the path of the content item that the message is associated with, to look for a matching website in the <sites> section and its startItem attribute. The module then uses the hostName attribute of that website to generate the URLs.

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4.2 Configuring Access to Social Networks

When interacting with social networks, the module uses the API of the social networks. You must create a web application for every social network that you want the module to communicate with and create a Sitecore item for the social network account.

4.2.1 Facebook

To configure posting of content messages to Facebook:

1. Create a new web application or use an existing one and then create a Sitecore item for the web application.

For more information about creating a web application, see the section *Creating and Configuring a Facebook Web Application*.

2. In Sitecore, in the Content Editor, in the /sitecore/system/Social/Accounts/ folder, create a new account item using the wizard. For more information about how to use the wizard, see the section *Creating an Account Item*.

4.2.2 Twitter

To configure posting of content messages to Twitter:

- 1. Create a new web application or use the existing one and create a Sitecore item for the web application. For more information about how to create a web application, see the section *Creating and Configuring a Twitter Web Application*.
- 2. Set the required permissions on the web application.

For more information about the required permissions, see the section Twitter Web Application .

3. In Sitecore, in the Content Editor, in the /sitecore/system/Social/Accounts/ folder, use the wizard to create a new account item.

For more information about the wizard, see the section *Creating an Account* Item.



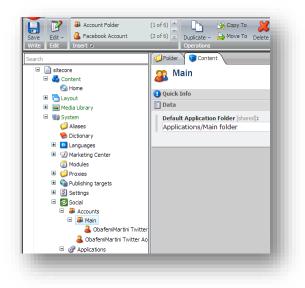
4.3 Creating an Account Item

Before you create an account item, you can create an account folder to store account items.

To create an account folder:

- 1. In the Content Editor, navigate to the sitecore/system/social/accounts folder.
- 2. Click the Account Folder insert option and enter the name of the folder.
- 3. Select the new folder, on the **Content** tab, in the **Default Application Folder** field, specify the application folder.

The web applications in the application folder are used in the **Add a Social Network Account** wizard when an administrator creates accounts from the current account folder.



To create an account item:

- 1. In the **Content Editor**, navigate to the sitecore/system/social/accounts folder and select an account folder.
- 2. To start the Add a Social Network Account wizard, click the Facebook Account, Twitter Account, LinkedIn Account or Google+ Account insert option.

The **Add a Social Network Account** wizard guides you through the process of creating a network account.



Social Network

In the Network Application window, select the social network that you want to create an account for.

Select the social network application that you	want to create an account on.	3
Social Network:		
Facebook		
Network Application:		
FB App		
When you click Next, a browser window open	a Ta this window, optor your	huork crodoptials to
complete the authorization process.	s. In this window, enter your social net	work credentials to
		Cancel
	< Back Next >	

If the assigned default application folder contains more than one web application for this social network, in the **Network Application** field, select the web application that the account should use to cooperate with the social network.



Authentication

Authentication Please wait while	e the authorization process is completed.	
	Authorization is in progress	
	< Back Next >	Cancel

As part of this step, the wizard opens a new browser window, in which you must enter the credentials of the social network user account. The module will post messages to the wall of this user or its pages.

Sign Up Fac	ebook helps you connect and share with the people in your life.
	Facebook Login
	Log in to use your Facebook account with SC Social Local.
	Email:
	Password:
	Keep me logged in
	Log In or Sign up for Facebook
	Forgot your password?
	English (US) Українська Español Português (Brasil) Français (France) Deutsch Italiano العربية 辰君 中文(简体)

To set the user groups which can see activity from the web application on Facebook, click **Public** and select one of the user groups.

Click Go to App.

Review the permissions that the web application asks for and click **Allow**.



Note

To create an account, you must allow all the required permissions.

Select a Profile or Page

In the Select a Profile or Page window, you specify which profile or page the module should update.

Select the profile or the page that the wall of a social network profil	ie or an assigned pa	age.		
Profile or Page:				
Furniture				
		< Back	Next >	Cancel

The module can post messages to the user's wall or to any assigned Facebook pages. Select where you want to post messages to in the drop-down list.



Account Name

In the Account Name window, enter the name for this new network account.

Specify the name of the social network acc	count.	
Social Network Account Name:		
Furniture Facebook Account		
	< Back Next >	Cancel

Final Page

In the last window of the wizard, click Finish to close it.

A new item for the social network account is added to the Content Tree.



4.4 Creating a Message

When you have configured the web application and created a Sitecore item for the social network account, you can create a message.

To create and post a message:

- 1. In the **Sitecore Desktop**, in the **Content Editor**, select the item that you want to bind a message to.
- 2. On the **Publish** tab, click **Messages**. The **Messages** dialog box appears.

Alternatively, you can create a message in the Page Editor. To open the **Messages** dialog box, in the **Page Editor**, on the **Home** tab, click **Messages**.

3. In the **Messages** dialog box, click the **Create a Facebook Message** button **f** or the **Create a Twitter Message** button **2**. The **Facebook Message** or **Twitter Message** dialog box appears:

acebook Message	Ξ	<u>^ </u>
Message [shared]:	380	
Hi all, check out photos in our gallery.		
Insert Link · Insert Media Link · Insert External Link · Insert Anchor · Insert Email · Insert JavaScript · Follow Link · is displayed at the end of the message by default [shared]:	/ • Clear	
/Home.aspx		
Create Campaign Campaign - is triggered when a visitor clicks the link [shared]: Campaigns/Social/Facebook/Facebook Content Messages	▶	
Browse · Properties · Clear · Refresh Link Image [shared]:		E
/Images/Chrysanthemum		-
Dimensions: 1024 x 768 Default Alternate Text: "gallery"		
Link Title [shared]:		
Link Description [shared]:		
Post when the item is published - the message is posted to the social network when the content its Sitecore:	em is published in	
Accounts:		
Obafemi Martini Facebook Account		Ŧ

- 4. In the **Facebook message** or **Twitter message** dialog box, in the **Message** field, enter the text of the message.
- 5. In the **Link** field, enter the link to the webpage that you want the website visitor to go to. By default, the link refers to the current page.



6. In the **Campaign** field, select the campaign that is triggered when a visitor clicks the link.

If you assign a campaign to the message, you will be able to review DMS message statistics including value, visits, and value per visits for all the visitors who click on a link in this message. Note that the campaign must be deployed before you can use it in the message.

- 7. Click **Create Campaign** to create a new campaign. The new campaign is stored in the appropriate folders under *Marketing Center/Campaigns/Social*.
- 8. To stylize the link, use the Link Image, Link Title and Link Description fields. This is available for a Facebook message only.
- 9. To post the message automatically when you publish the current Sitecore item, select the **Post** when the item is published check box.
- 10. In the Accounts field, select the social network accounts that you want to post the message to.
- 11. Click **OK** to close the dialog box.
- 12. In the **Messages** dialog box, click **Post to all accounts** to post the message immediately.

	essages eate, edit and post a message on a social network.	
	Select the social network where you want to create a message.	
	Edit · Delete	Accounts
f	Hello from CPH.	▷ Posted (0) ▷ New (2) ▷ Failed (0)
		Post to all accounts

In a Twitter message, the link is inserted at the end of the message by default. To put the URL in the middle of the message text, in the **Twitter message** dialog box, use the <code>\$link</code> token in the **Text** field and enter the URL in the **Link** field. This token does not work for Facebook messages because Facebook structures the links according to Facebook's design.

Note

You can only post a message to a social network once.



4.5 Tracking Statistics on a Content Message

You can track the social media statistics on a content message: how many times the message is liked, commented, or retweeted.

5	ielect the social network where you want to create a message.	
Edi	lit · Delete · Refresh Statistics	Accounts
f∣⊦	Hi all, please check our new gallery.	▷ Posted (1)
	http://mysite_name.com/?sc_lang=en@sc_camp=0BBFAF88	▷ New (0) ▷ Failed (0)
		Post to all accounts
C	2 likes 3 comments Show of	campaign reports 💌

If you are using the Sitecore Social Connected module with DMS, you can also see information about any campaigns that are associated with messages. For more information about campaign statistics, see the section *Tracking Campaign Statistics on a Content Message*.

You can update the social media statistics manually and automatically.

Manually Updating the Statistics

To update the message statistics manually, click Refresh Statistics.



The module will use APIs of respective social networks to retrieve the updated data.

Automatically Updating the Statistics

The Sitecore Social Connected module uses the scheduled task called *Process Messages Statistics* to update statistics. This task is stored in the *Sitecore/system/tasks/ Schedules/social/process messages statistics* folder. It is ready to use. The task updates statistics at increasing time intervals depending on the *age* of the message, to balance the freshness of the data with the number of web requests to the social network APIs.

The module stops updating the statistics when the message is 107 days old. You can change this parameter in the Sitecore.Social.config file, in the Social.FibonacciRefreshStrategy.StopRefreshAge setting.

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Chapter 5 Analytics Features

You can use the Sitecore Social Connected module and the Sitecore Digital Marketing Suite to personalize your website. The Social Connected module provides the Like and Tweet buttons as standard Sitecore controls that track visitors' activity.

This chapter contains the following sections:

- Tracking Campaign Statistics on a Content Message •
- Putting Like and Tweet Buttons on the Web Page
- Tracking Like and Tweet Buttons Usage ٠
- Personalization Rules for the Social Connected Module



5.1 Tracking Campaign Statistics on a Content Message

If you use the Sitecore Social Connected module with DMS, you can track the campaign statistics on a content message.

	Select the social network where you want to creat	e a message.		
	Edit · Delete · Refresh Statistics			Accounts
f	Hi all, please check our new gallery.			▷ Posted (1) ▷ New (0)
	http://mysite_name.com/?sc_lang=en@s	ac_camp=0BBFAF88		Failed (0)
				Post to all accounts
	2 likes 3 comments	Hide campaign reports		
	Campaign: Facebook Content Messages			
	150 Value			
	3 Visits			
	50 Value per Visit	J		
	Sessions Report Campaign Dashboard		0	

These statistics are available for the messages that are assigned campaigns.

To see the campaign statistics, click Show campaign reports.

By default, a content message uses the generic *Twitter Content Messages* or *Facebook Content Messages* campaigns. The reports for these campaigns give you an overview of the effectiveness of all your Twitter or Facebook messages.

To only see the numbers for a particular message, when you set up the message, click **Create campaign** to create a new campaign for that message. For more information about creating a message, see the section *Creating a Message*.

To get detailed information about a session report or a campaign dashboard, click the respective link.

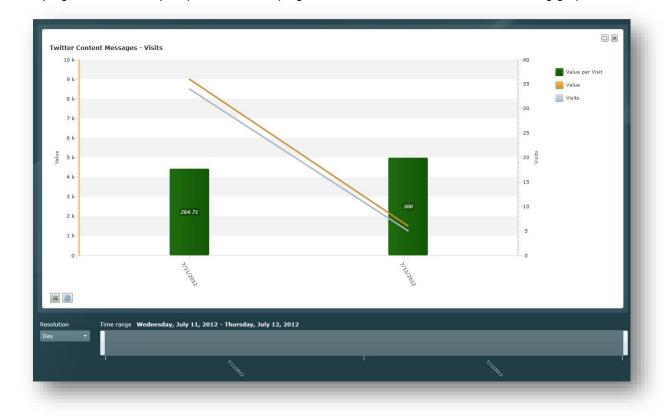
Note

The Sitecore Social Connected module gathers campaign statistics from DMS aggregate tables. As a result, the campaign statistics are updated as often as DMS aggregation task runs.



Campaign Dashboard report

Campaign Dashboard report presents a campaign statistics overview, data over time, using graphs.



Session report

Session report presents detailed campaign information, along with review of individual sessions and visits to understand more about the experience of the visitors after they click the twitter/facebook link. This



report shows what visitors are doing on the website, what are potential problems in their experience.

🛁 Print 🕞 S	ave 🕼	4 Page 1 of 1 ▶ ▶ ■ Q 100%	🛕 Whole Report	🔀 MailReport	
	C	ampaign report		iign ld: c792ec69 Generated: Jul.	-ade9-479c-8fa6-1425e604a9d 13, 2012
	R	eport description			
		Organization	Value	Visit #	Date & Time
	1.	IP_NOT_FOUND(N/A) Classify / Subscribe / CRM	450	<u>117</u>	2012-07-12 07:34
	2.	IP_NOT_FOUND(N/A) Classify / Subscribe / <u>CRM</u>	300	1	2012-07-12 05:46
	3.	IP_NOT_FOUND(N/A) Classify / Subscribe / CRM	150	1	2012-07-12 05:45
	4.	IP_NOT_FOUND(N/A) Classify / Subscribe / CRM	150	<u>18</u>	2012-07-12 05:45
	5.	IP_NOT_FOUND(N/A) Classify / <u>Subscribe</u> / <u>CRM</u>	150	1	2012-07-12 05:45
	6.	IP_NOT_FOUND(N/A) Classify / Subscribe / CRM	750	<u>13</u>	2012-07-12 05:44

For more information about DMS reports, see the documentation on SDN.



5.2 Putting Like and Tweet Buttons on the Web Page

You can put the Like (for Facebook) and Tweet (for Twitter) buttons on the website.

Home Advanced Experience View Eat Preview + Component Insert Lock Workbox Publish Close Mode New Edit Olose Close Close Close	
* Add to here * Add to here itecore	Stecor Webpage Dialog Sect a Rendering Select the rendering that you want to use. Click Select to continue. Sample Rendering Like Button Tweet Button
	Open the Properties dialog box immediately. Select Cancel

Sitecore provides them as standard controls. You can find the controls in the sitecore/layout/sublayouts/social/sharing folder.

To make these controls available for users to put on a webpage, you must enable the controls on the appropriate placeholder:

- 1. In the **Content Editor**, navigate to sitecore/layout/placeholder settings folder and select the placeholder item where the controls will be located
- 2. In the Allowed Controls field add the Like Button and the Tweet Button controls to the list of the selected controls.

For more information about the *Tweet* button, see the official Twitter documentation:

https://dev.twitter.com/docs/tweet-button

For more information about the *Like* button, see the official Facebook documentation:

http://developers.facebook.com/docs/reference/plugins/like/



5.3 Tracking Like and Tweet Buttons Usage

After you placed the *Like* and *Tweet* buttons on the website, you can assign campaigns and goals to these buttons. Every time a website visitor clicks the button a specific goal or campaign is triggered and registered in Sitecore Analytics.

The Sitecore Social Connected module provides *Like* and *Tweet* goals for the *Like* and *Tweet* buttons. You can find these goals in the sitecore/system/marketing center/goals folder. Make sure to configured the *Like* and *Tweet* goals before using them.

General	Ξ	<u>.</u>	
Placeholder [shared]:			
Insert link • Clear			
Data Source [shared]:			
		E	
Sharing	Ξ	-	
Goal [standard value]: Goals/Like	~		
Goals/Like	•		
Campaign [standard value]: Campaigns/Social/Facebook/Facebook Share Buttons	~		
campaigns/social/racebook/racebook share bucchs			
Caching	Ξ		
Caching [shared]: Cacheable U vary by Opta			
Vary by Device Vary by Device Vary by Deameters		-	
Vary by Parameters	OK Cano		-

The module also provides several campaigns specific to social network activities. You can find social campaigns in the sitecore/system/marketing center/campaigns/social folder.

For more information about goals and campaigns, see the manual *Marketing Operation Cookbook* on the SDN.



5.4 Personalization Rules for the Social Connected Module

The Social Connected module adds four personalization conditions and an action to the Sitecore Rule Set Editor.

You can use these personalization conditions and the action with the Social Connected module to personalize the website.

The Sitecore Social Connected module provides the following conditions:

- where the gender of the current user is <u>value</u>
- where the current user is interested in <u>value</u> on any connected social network
- where the current user is connected to the <u>specific</u> social network
- where the <u>network</u> profile <u>specific</u> field <u>compares to value</u>

Select the conditions and actions first. Then specify the values in the description.
Select the conditions for the rule:
Sites where the current database name <u>compares to value</u> where the current device <u>compares to value</u> where the current web site name <u>compares to value</u>
Social where the gender of the current user is <u>value</u> where the current user is interested in <u>value</u> on any connected social network where the current user is connected to the <u>specific</u> social network where the <u>network</u> profile <u>specific</u> field <u>compares to value</u>
Workflows where the item is a final workflow state where the item is in a workflow where the item is locked
Rule description (click an underlined value to edit it):
Condition Name This rule has no conditions.
OK Cancel

The Sitecore Social Connected module provides the following action:

• send associated messages.

For more information about personalization rules, see the manual *Marketing Operation Cookbook* on the SDN.

Where the gender of the current user is value

This condition defines visitor's gender.

Where the current user is interested in value on any connected social network

This condition checks for the existence of the value in multiple profile fields in each connected network.



Editors can use this rule to define visitors interested, for example, in sports, instead of creating multiple rules to check individual profile attributes, such as interests, hobbies, books, and so on.

The set of attributes that this condition checks is configured in the social.network_name.config file, in the *<interestedInRule>* section.

Note

The where the current user is interested in value on any connected social network condition only supports one keyword for the value. Consider creating several conditions to use several values.

Where the current user is connected to the specific social network

This condition checks whether the visitor is connected to the specific social network.

Where the network profile specific field compares to value

This condition checks whether a specific profile field contains a specific value.

Use this condition when you need more specific requirements that are not covered by other rules.



Chapter 6 Developer's Notes

The Sitecore Social Connected module uses 5 pipelines. This chapter describes the goals of the pipelines and their processors.

The chapter contains the following sections:

The Social Connected Module Pipelines •



6.1 The Social Connected Module Pipelines

The Sitecore Social Connected module uses 5 pipelines.

6.1.1 CreateSocialMessage Pipeline

The CreateSocialMessage pipeline is used when the module creates a message for a social network.

GetRoot Processor

The GetRoot processor creates a path in the content tree for the message item.

CreateItem Processor

The CreateItem processor creates two items under the message item: message and source items.

SaveData Processor

The SaveData processor saves message data from its fields.

6.1.2 ReadSocialMessage Pipeline

The ReadSocialMessage pipeline reads all the messages for the current item from the content tree and returns the messages collection.

GetMessagesRoot Processor

The GetMessageRoot processor reads the message item path for the current Sitecore item.

ReadMessages Processor

The ReadMessages processor reads all the messages for the current Sitecore item.

6.1.3 PublishMessage Pipeline

The PublishMessage pipeline posts the message to the social network.

ResolvePublishProvider Processor

The ResolvePublishProvider processor selects a publishing provider to post the message.

PublishMessage Processor

The PublishMessage processor posts the message to the social network.

6.1.4 BuildMessage Pipeline

The BuildMessage pipeline builds the message before it is posted to the social network. It returns the message object that is ready to be posted.

ResolveRenderer Processor

The ResolveRenderer processor returns the message builder for the source (goal or content).



BuildMessage Processor

The BuildMessage processor builds the message.

ReplaceTokens Processor

The ReplaceTokens processor replaces tokens with their values.

6.1.5 MatchUser Pipeline

The MatchUser pipeline uses the data provided by the user to search for an existing user or creates a new user if no existing user is found.

PrepareUserData Processor

The PrepareUserData processor creates data for the user: username and email. This is based on the user basic data.

FindByEmail Processor

The FindByEmail processor uses the email information provided by the user to search for an existing user.

FindByDomain Processor

The FindByDomain processor searches for an existing user by domain.

FindByNetworkCredentials Processor

The FindByNetworkCredentials processor uses the network credentials (ID) to search for an existing user.

CreateUser Processor

The CreateUser processor creates a new user.



Chapter 7 Tips and Tricks

This chapter contains some tips and tricks for developers and administrators.

This chapter contains the following sections:

- What Roles Social Connected Authors Require? ٠
- How to Use the Error Handling Mechanism



7.1 What Roles Social Connected Authors Require?

The Sitecore Social Connected module provides the following security role for content authors and editors:

Sitecore\Sitecore Client Social Authoring

This role gives a user permissions to work with content messaging. This role is assigned to a user together with the *Sitecore Author* role.

You must assign the **Sitecore\Analytics Maintaining** role to a user if you want to enable creating goal/page event messages, and creating campaigns for messages. You must assign the **Sitecore\Analytics Reporting** role to a user if you want to enable viewing DMS reports for a message.



7.2 How to Use the Error Handling Mechanism

The Sitecore Social Connected module contains an error handling mechanism that you can use to display error messages both on the website and in the Sitecore Desktop. This mechanism lets you personalize the look and style of the errors that are displayed in your solution.

The error handling mechanism deals with the module features that directly cooperate with social networks. An error is typically comprised of a simple message and a detailed message. You can find the detailed message in the module log files under the folder [installation_root]\data\logs. The simple message is displayed in the UI.

You can use the language packages provided with the module to localize the simple error messages.

7.2.1 Error Handling on the Website

Any errors that are caused by visitors on the website when they use the Social Connector log in buttons are also registered. The module registers detailed error messages in the log files.

To display the error messages to website visitors in the style used by your website, a developer should follow this procedure:

- 1. Create a control that looks for authentication errors in the query string and gets the GUID of the error.
- 2. Get the simple and detailed error message using exception manager and method Sitecore.Social.Exceptions.ExceptionManager.Get(errorKey)
- 3. Display this information to the website visitors in the same style as the website design.