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.

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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.

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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*.

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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

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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.

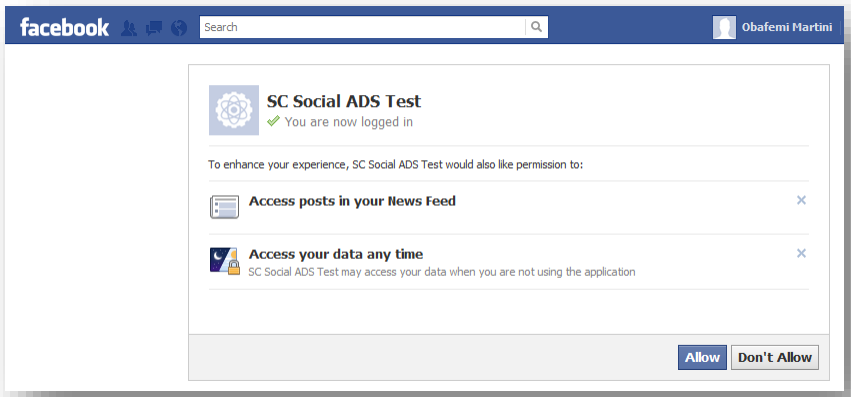
2.1.1 Use Case

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.



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.

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2.2 Configuring Access to Social Networks

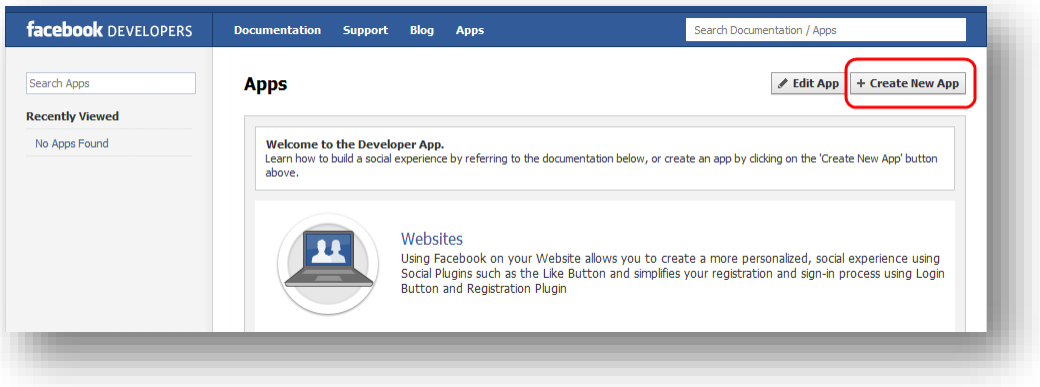
When interacting with social networks, Sitecore Social Connector uses the API of the social networks or the OAuth protocol for Google+. You must create a web application for every social network that you want the module to communicate with. You must also create a Sitecore item for each web application.

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 https://developers.facebook.com/apps and create a new web application.



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

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

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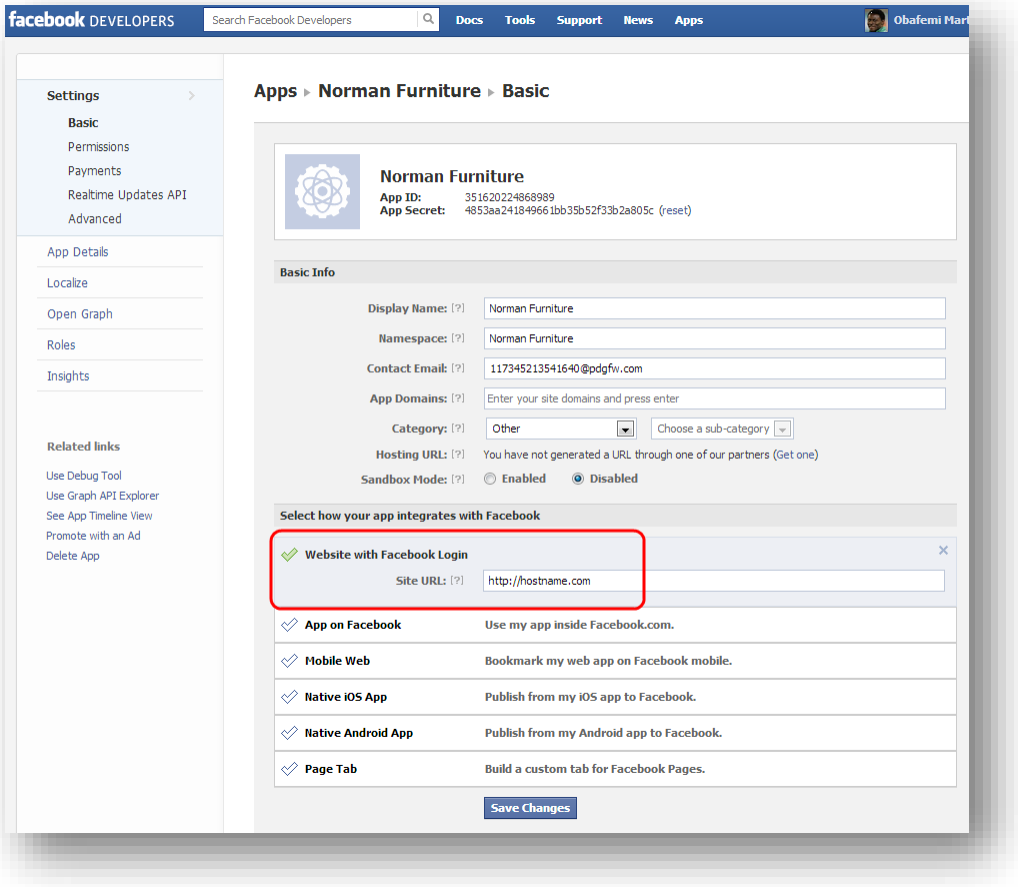
3. In the **Select how your app integrates with Facebook** section, select **Website** and in the **Site URL** field, enter the URL of the web page where you want to place the login controls.



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.

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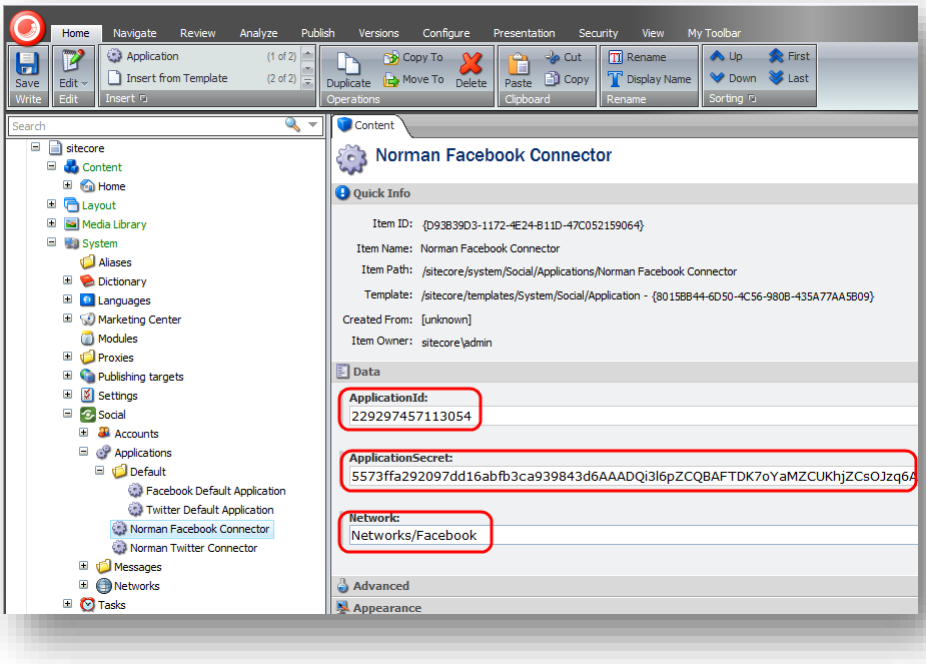
6. In the new item, enter the appropriate information:

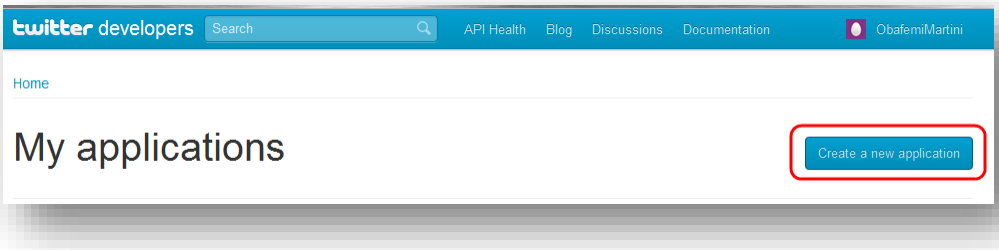


Field	Value
ApplicationId	The **App ID** value of the web application
ApplicationSecret	The **App Secret** value of the web application
Network	Facebook

2.2.2 Creating and Configuring a Twitter Web Application

To create and configure a web application for Twitter:

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



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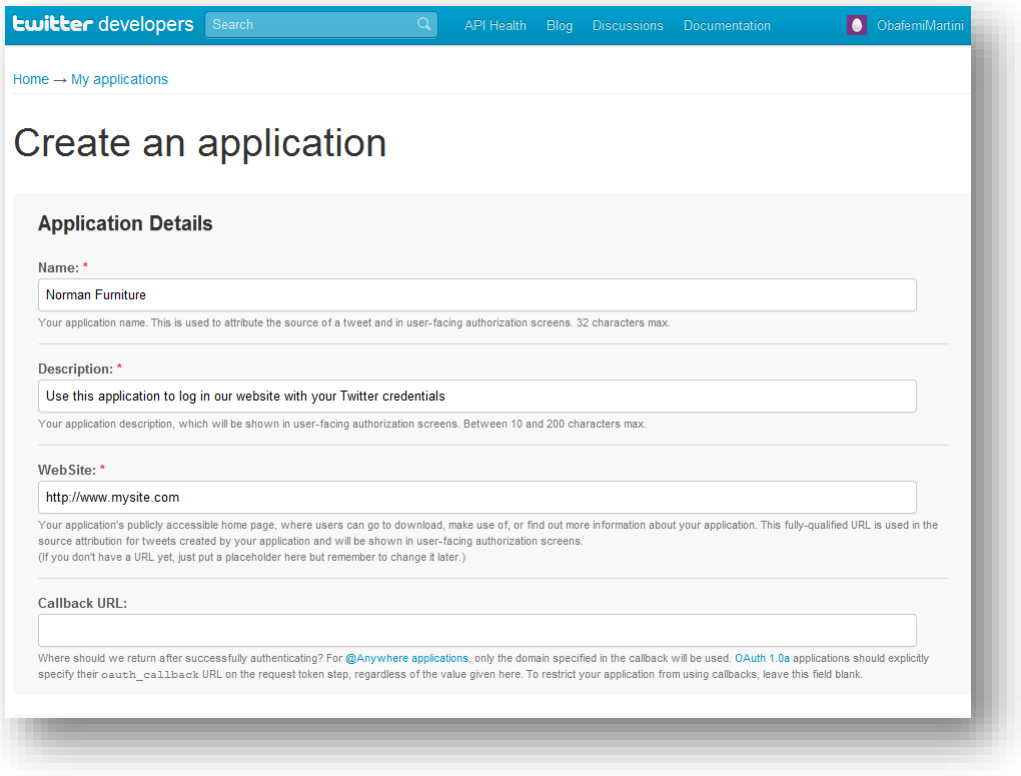
2. In the web application, in the **Application details** section, fill in all the required fields.



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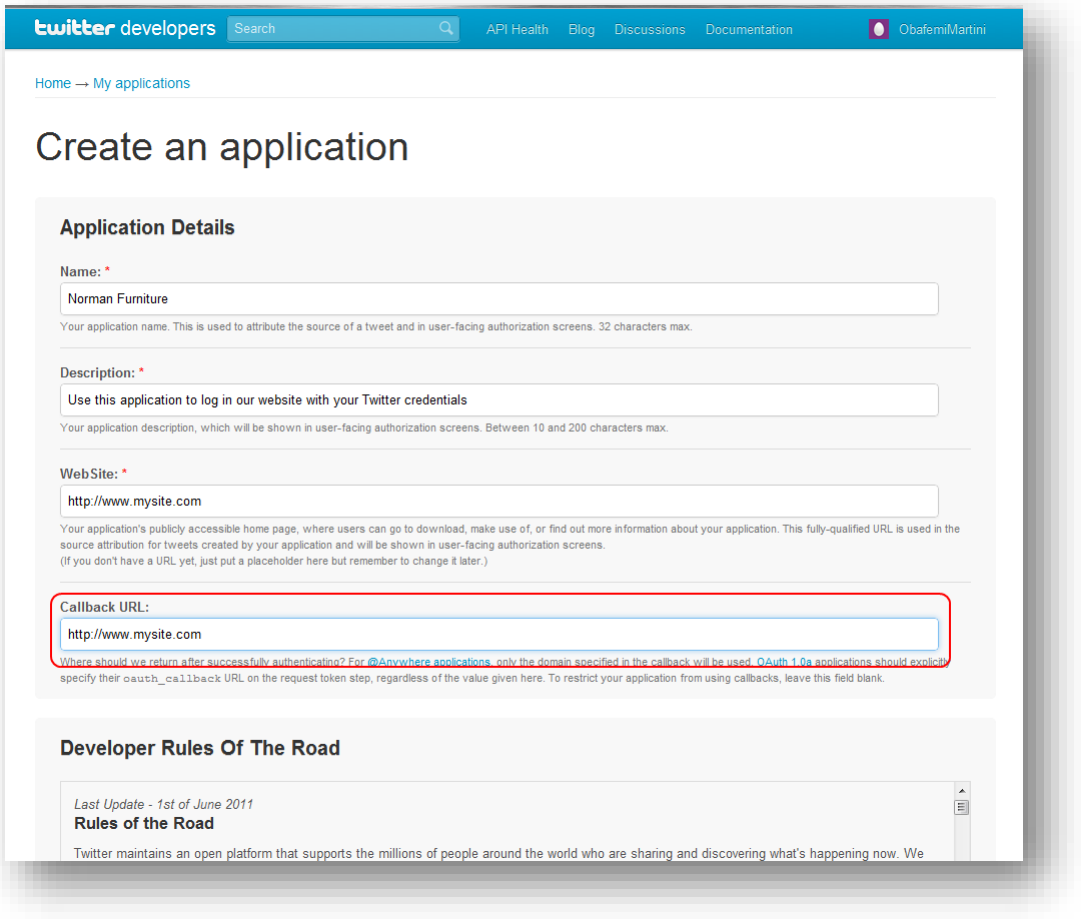
3. In the **Callback URL** field, enter the URL of the webpage where you want to place the login controls.



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.

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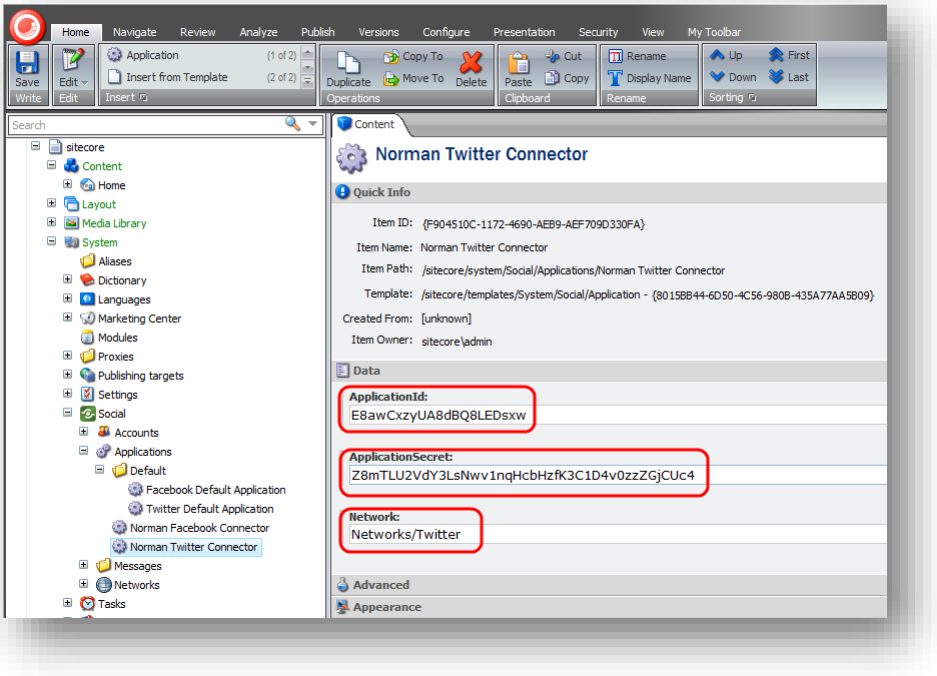
6. In the new item, enter the appropriate information:

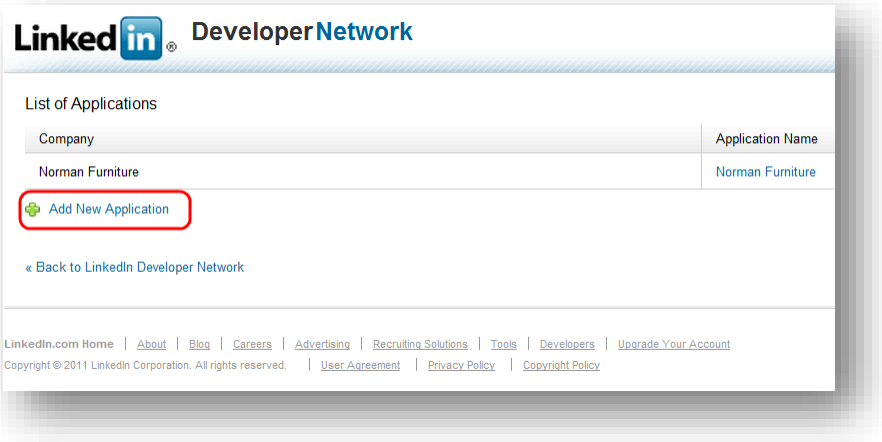


Field	Value
ApplicationId	The **Consumer Key** value of the web application
ApplicationSecret	The **Consumer Secret** value of the web application
Network	Twitter

2.2.3 Creating and Configuring a LinkedIn Web Application

To create and configure a web application for LinkedIn:

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



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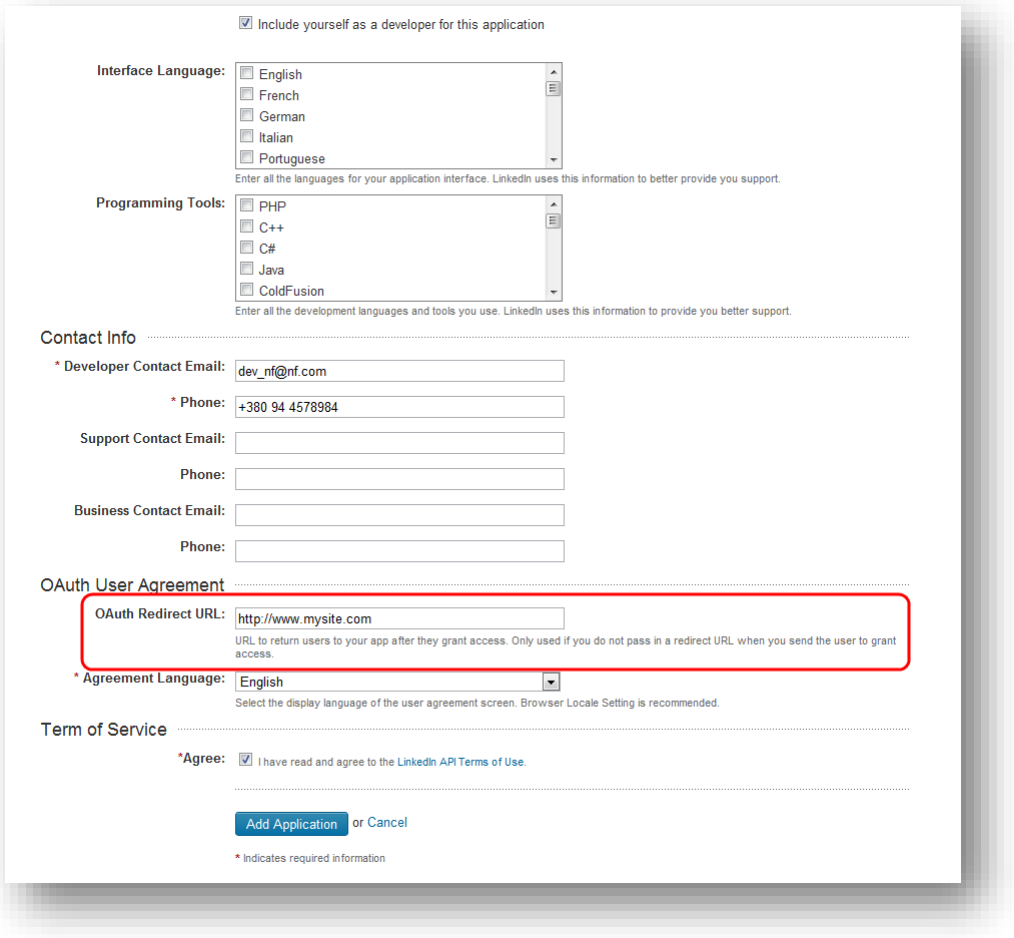
2. In the web application, fill in all the required fields.
3. In the **OAuth User Agreement** section, in the **OAuth Redirect URL** field, enter the URL of the web page where you want to place the login controls.



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.

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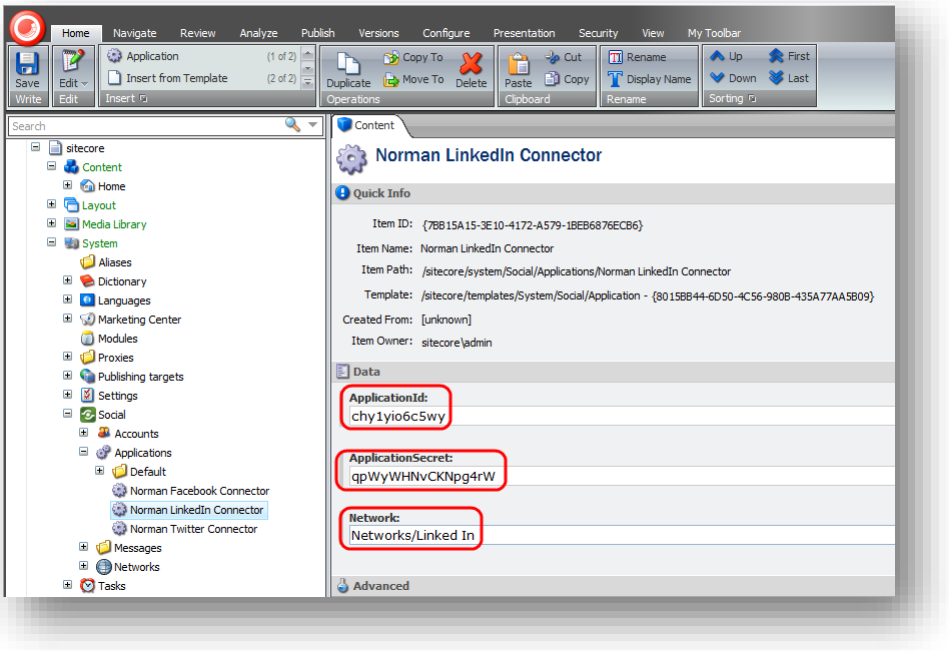
6. In the new item, enter the appropriate information:



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

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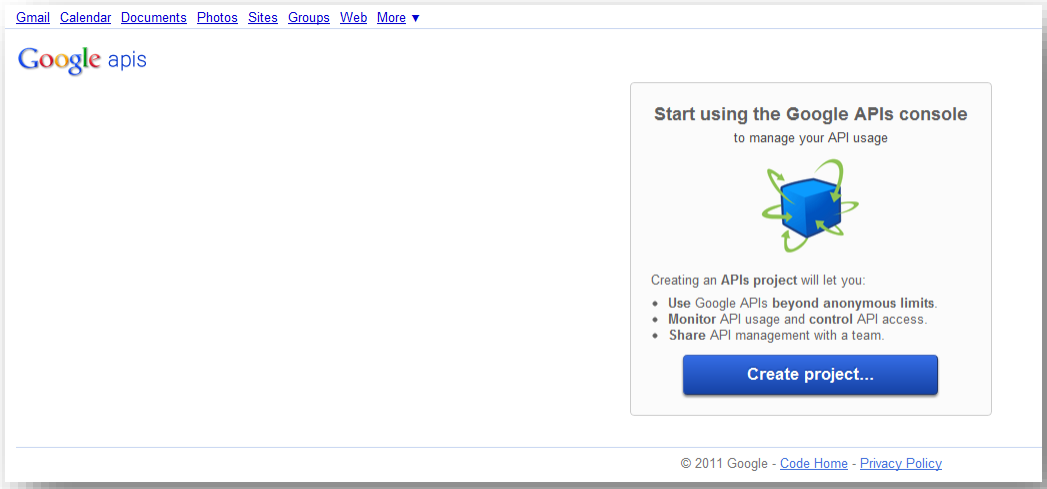
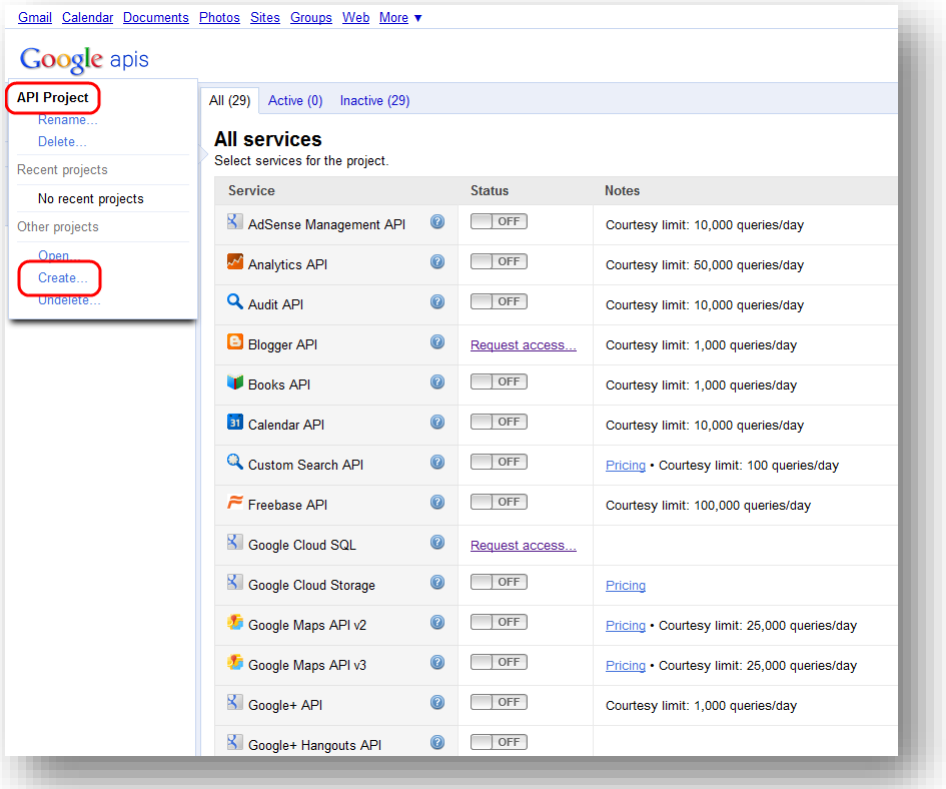
2.2.4 Creating and Configuring a Google+ Web Application

To create and configure a web application for Google+:

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



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



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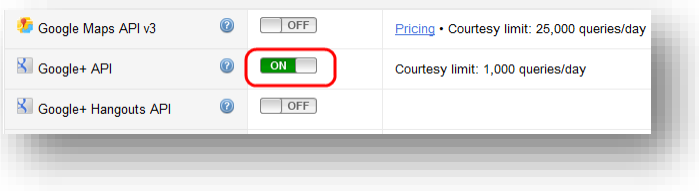
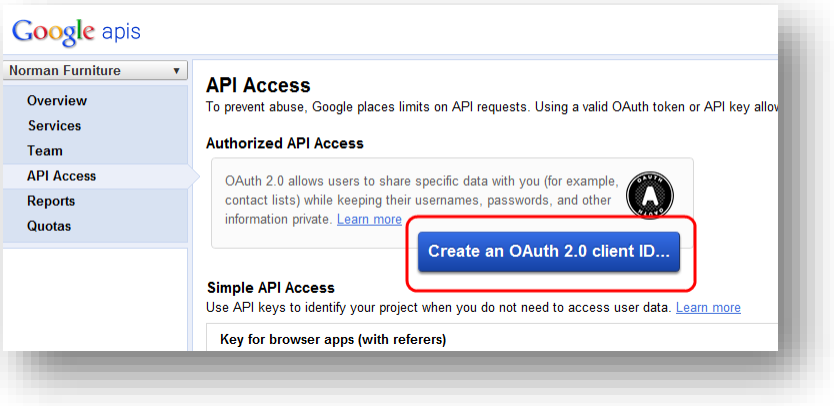
3. In the **Create Project** dialog box, enter the name of the project and then click **Create Project**.
4. On the **All Services** page, set **Google+ API** to **On**.



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



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**.

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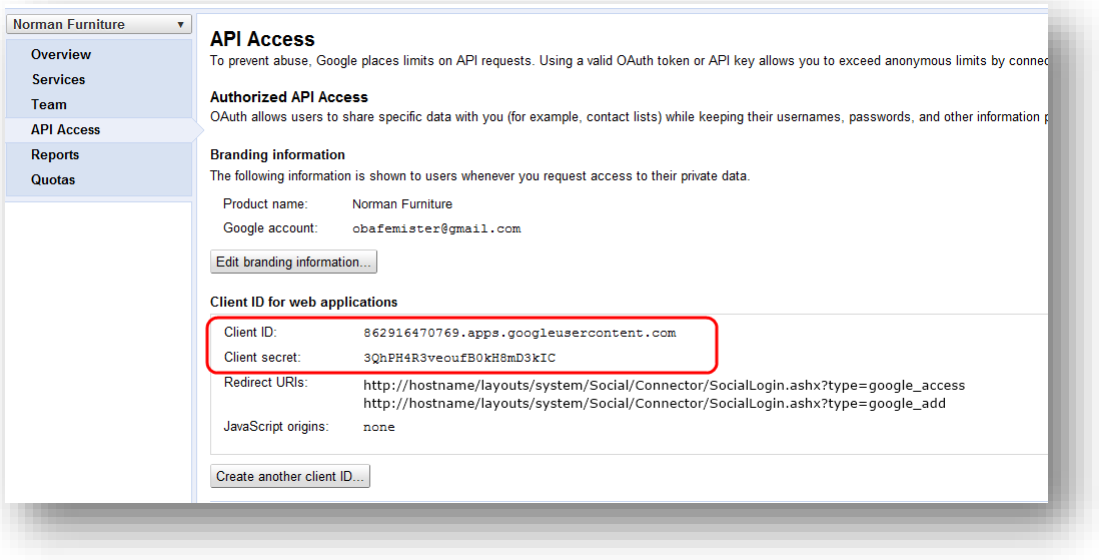
13. On the **API Access** page, save the values of the **Client ID** and **Client secret** fields.



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.

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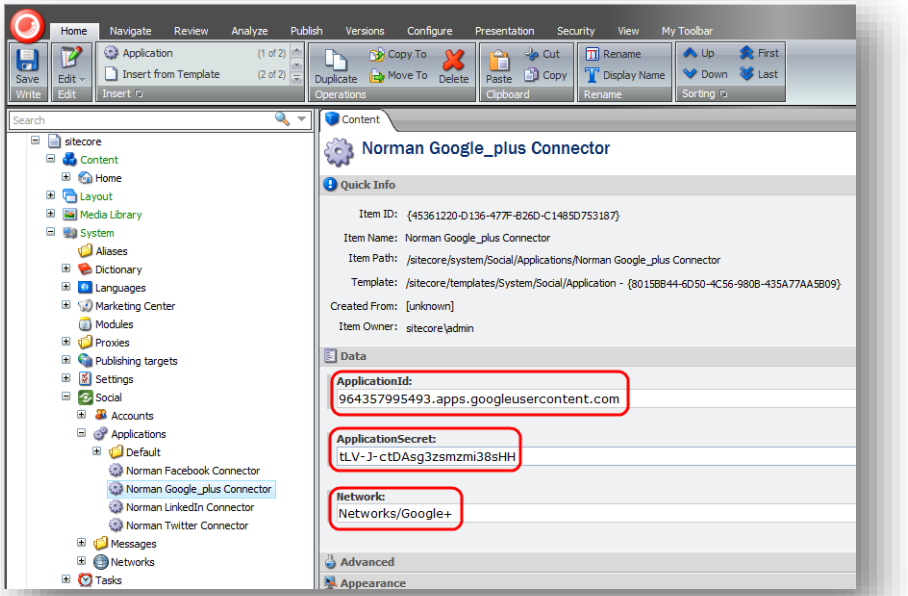
16. In the new item, enter the appropriate information:



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

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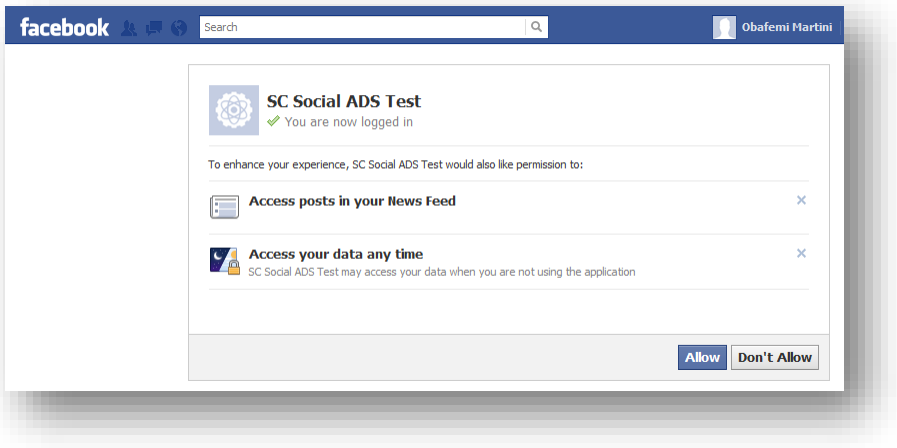
2.3 Configuring Access to the Visitor's Profile Information

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.



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.network_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.

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

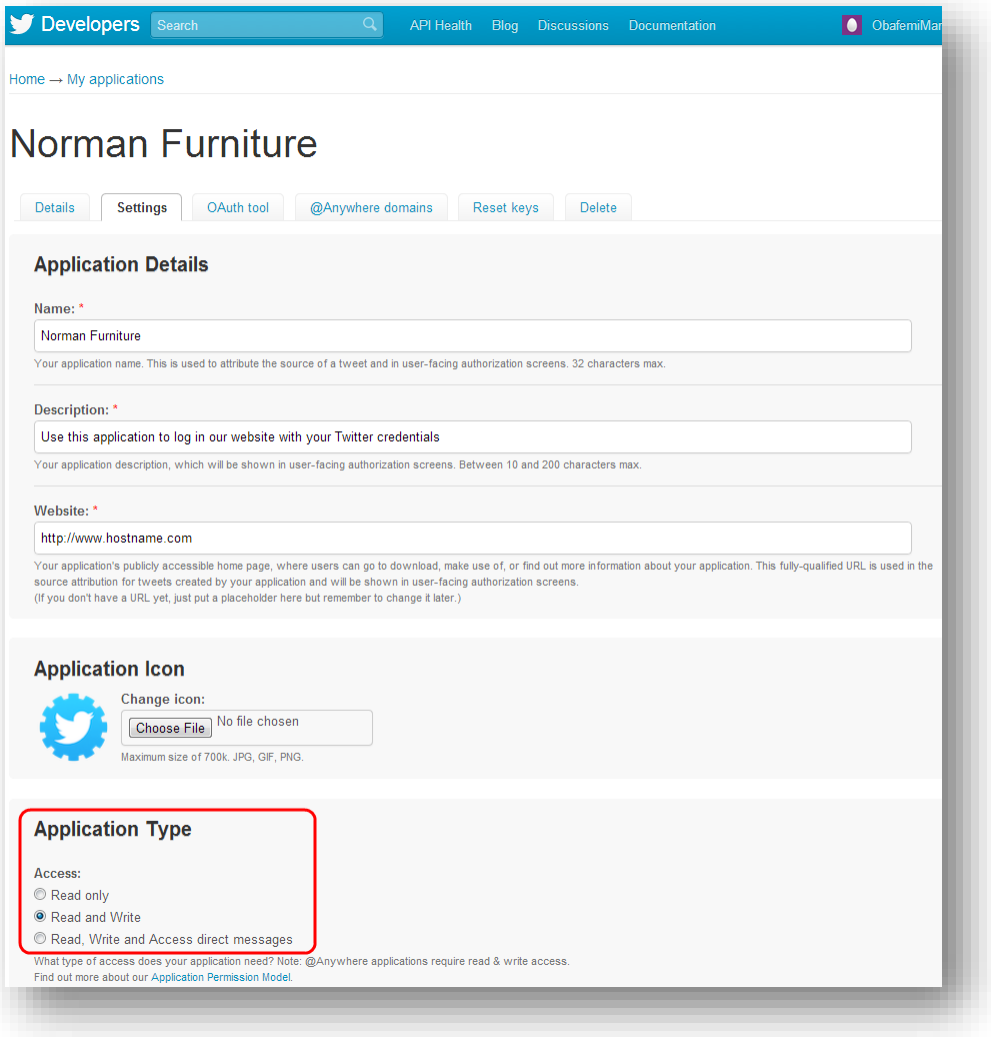
- For Facebook documentation, go to http://developers.facebook.com/docs/reference/api/user/.
- For LinkedIn documentation, go to https://developer.linkedin.com/documents/profile-fields.
- For new Google+ API, go to https://developers.google.com/+/api/latest/people.

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 https://dev.twitter.com/apps 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.



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

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

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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 s`itecore/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.

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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 `aspnet_profile` 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 `sitecore.social.profilemapping.network_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.network_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 https://developers.google.com/+/api/latest/people.
- For Twitter documentation, go to https://dev.twitter.com/docs/api/1/get/users/show.

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:

1. 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 Scheduled Tasks 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:

```
        <agent type="Sitecore.Social.Connector.ScheduledTaskPerformer" method="SynchronizeData"
interval="00:00:00">
        </agent>
```

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.

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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);
             }
           }
```

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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

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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 Marketing Operations Cookbook, 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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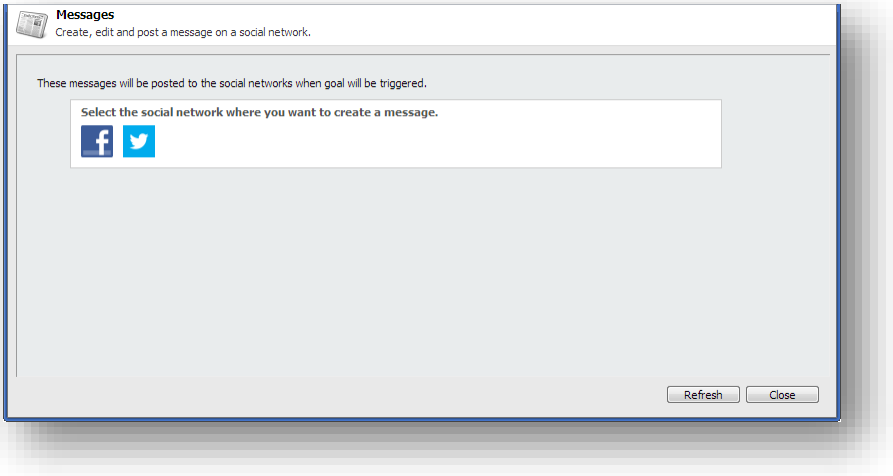
3.2 Creating a Message

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.



3. In the **Messages** dialog box, click the **Create a Facebook Message** button or the **Create a Twitter Message** button .
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 `$link` 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:

   - `GetPreference`
   - `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);
```

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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);
```

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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

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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.

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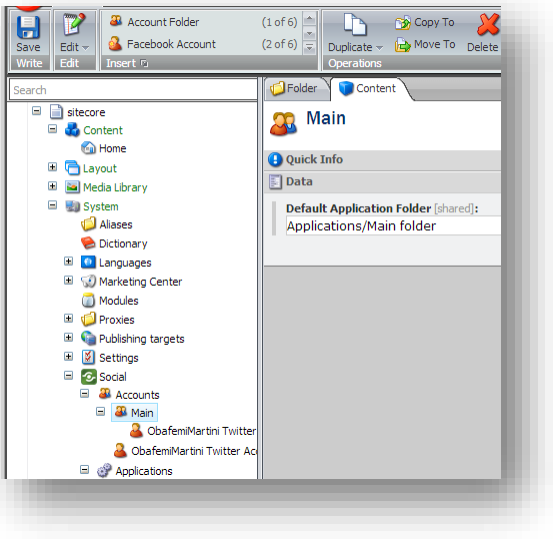
4.3 Creating an Account Item

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.

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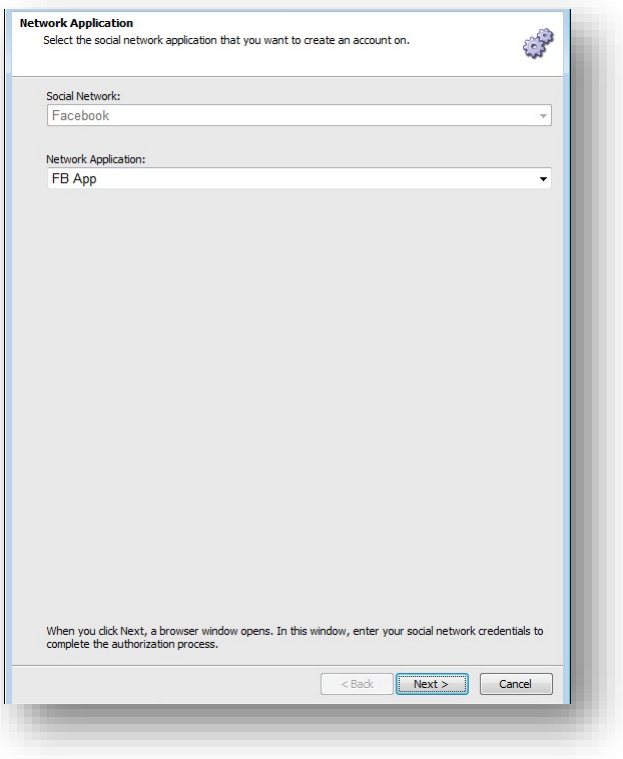
Social Network

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



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.

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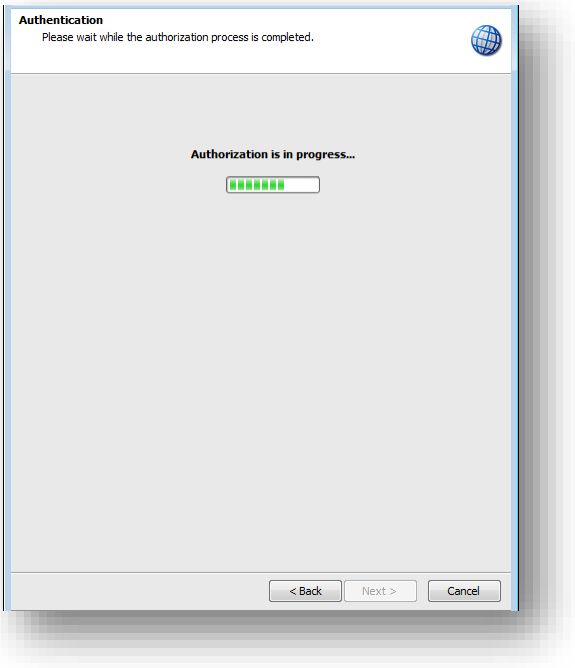
Authentication



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.

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**.

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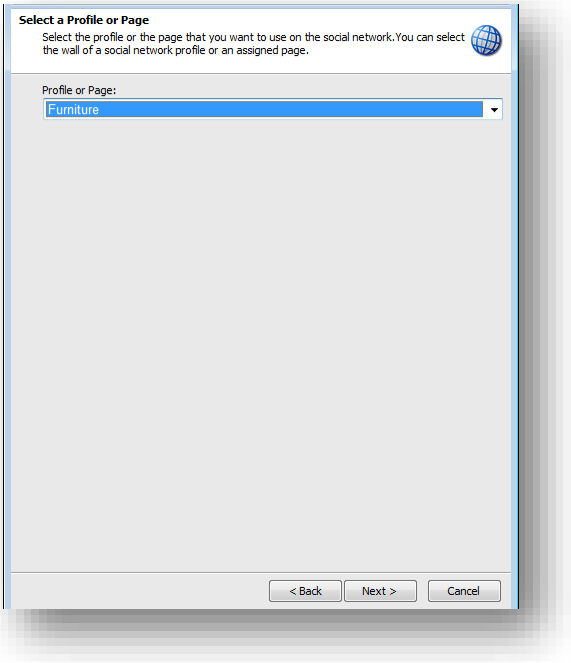
Note
To create an account, you must allow all the required permissions.

Select a Profile or Page

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



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.

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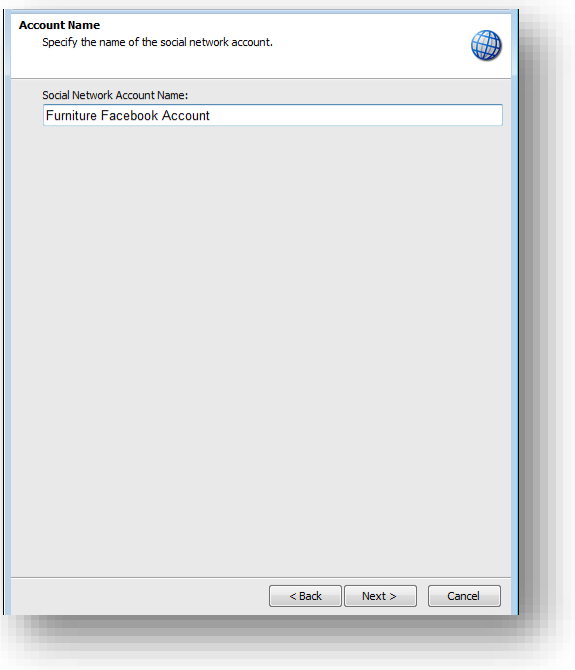
Account Name

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



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.

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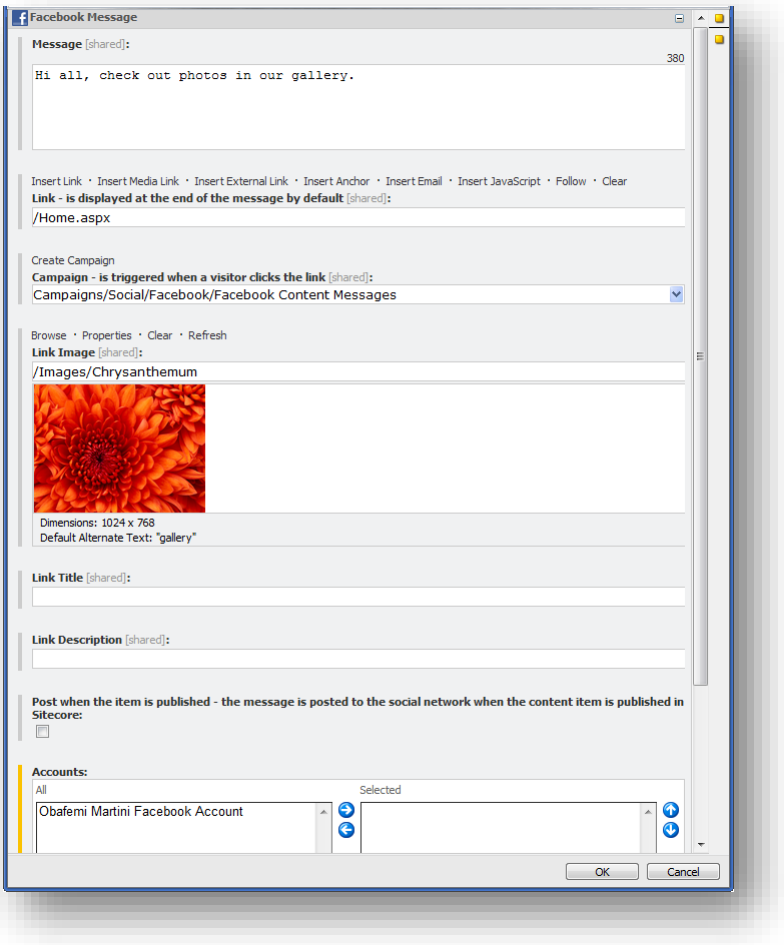
4.4 Creating a Message

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 or the **Create a Twitter Message** button. The **Facebook Message** or **Twitter Message** dialog box appears:



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.

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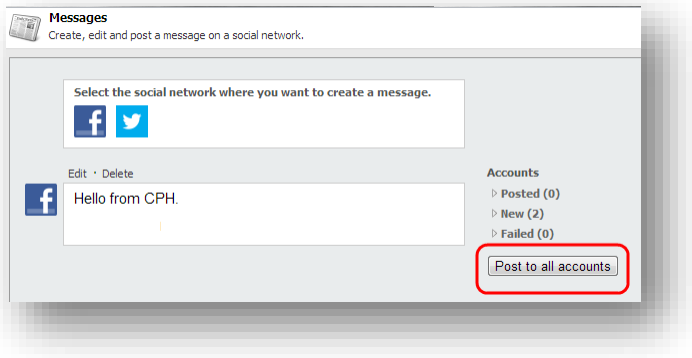
6. In the **Campaign** field, select the campaign that is triggered when a visitor clicks the link.

   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.



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 `$link` 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.

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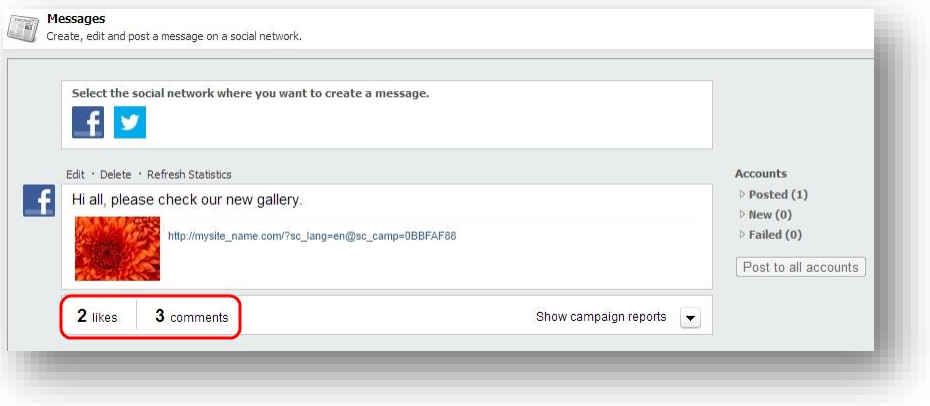
4.5 Tracking Statistics on a Content Message

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

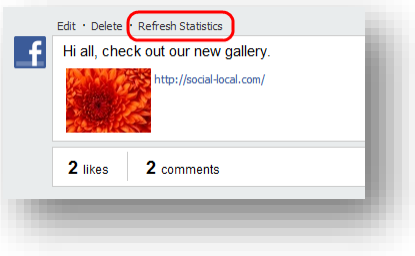


If you are using the Sitecore Social Connected module with DMS, you can also see information about any campaigns that are associated with messages. For more information about campaign statistics, see the section *Tracking Campaign Statistics on a Content Message*.

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
- Personalization Rules for the Social Connected Module

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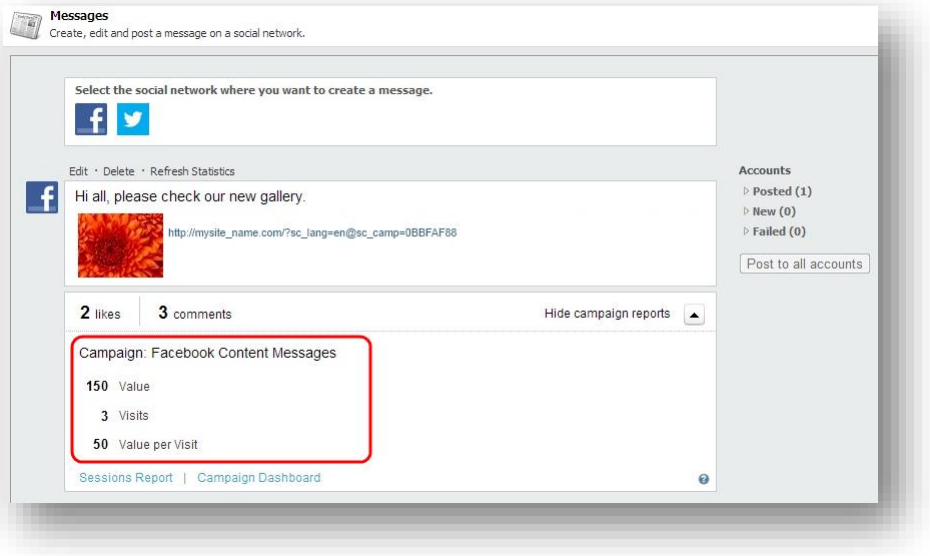
5.1 Tracking Campaign Statistics on a Content Message

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



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.

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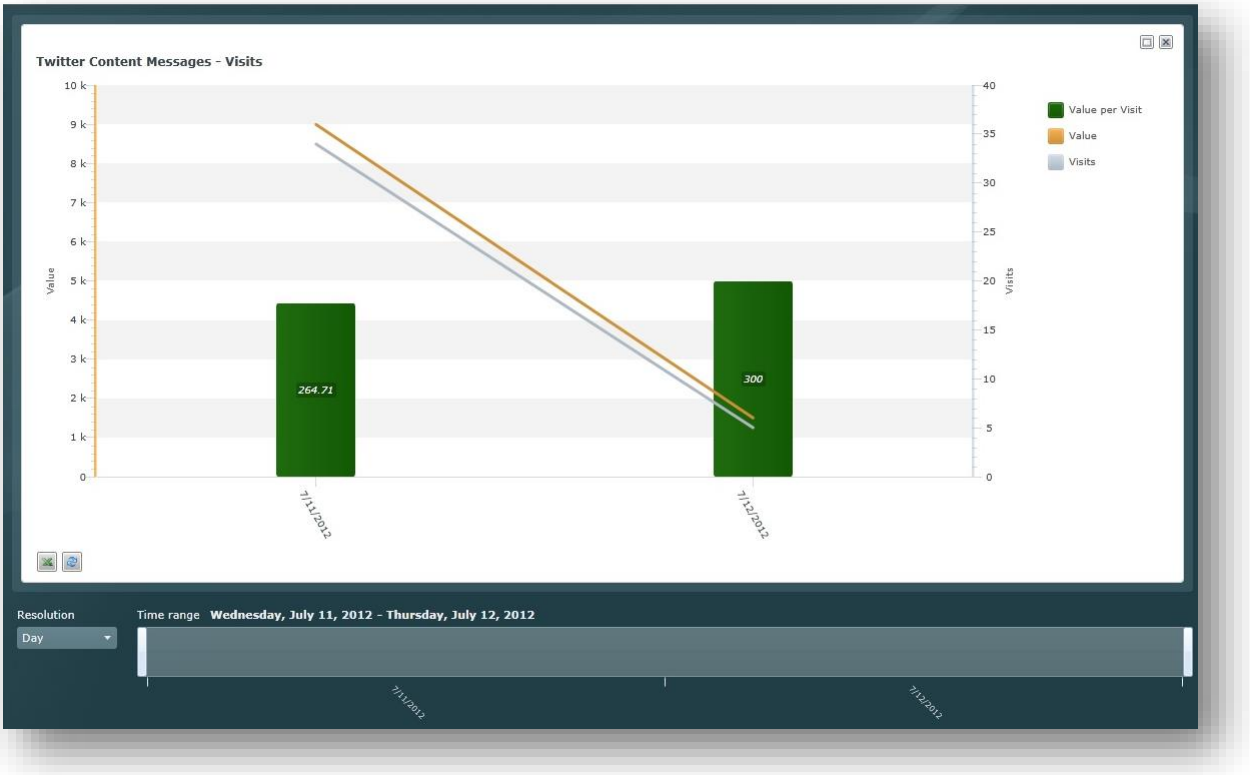
Campaign Dashboard report

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

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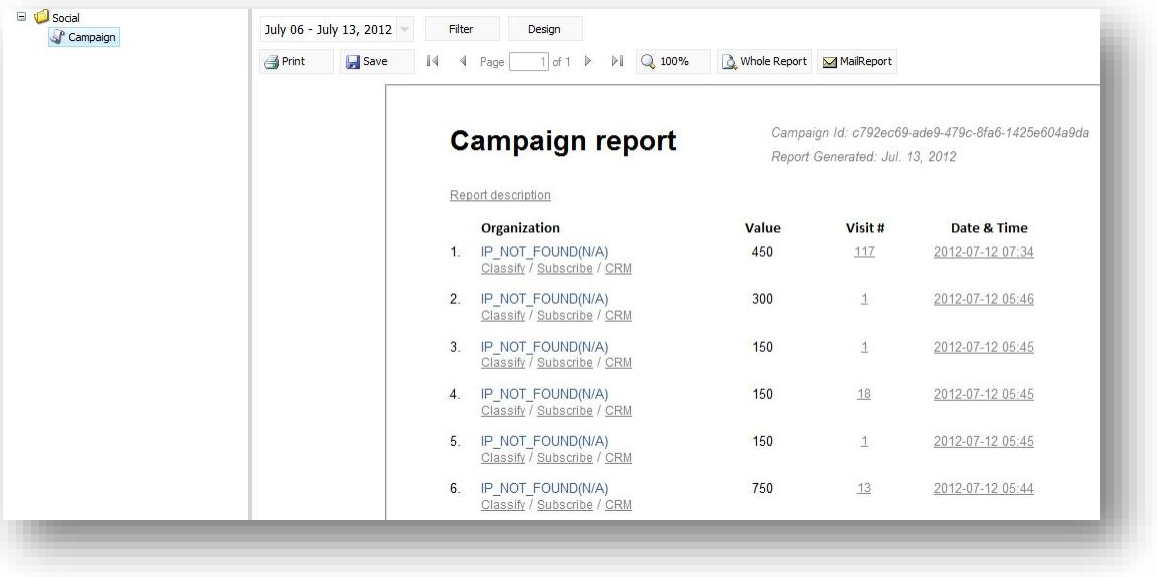
report shows what visitors are doing on the website, what are potential problems in their experience.



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

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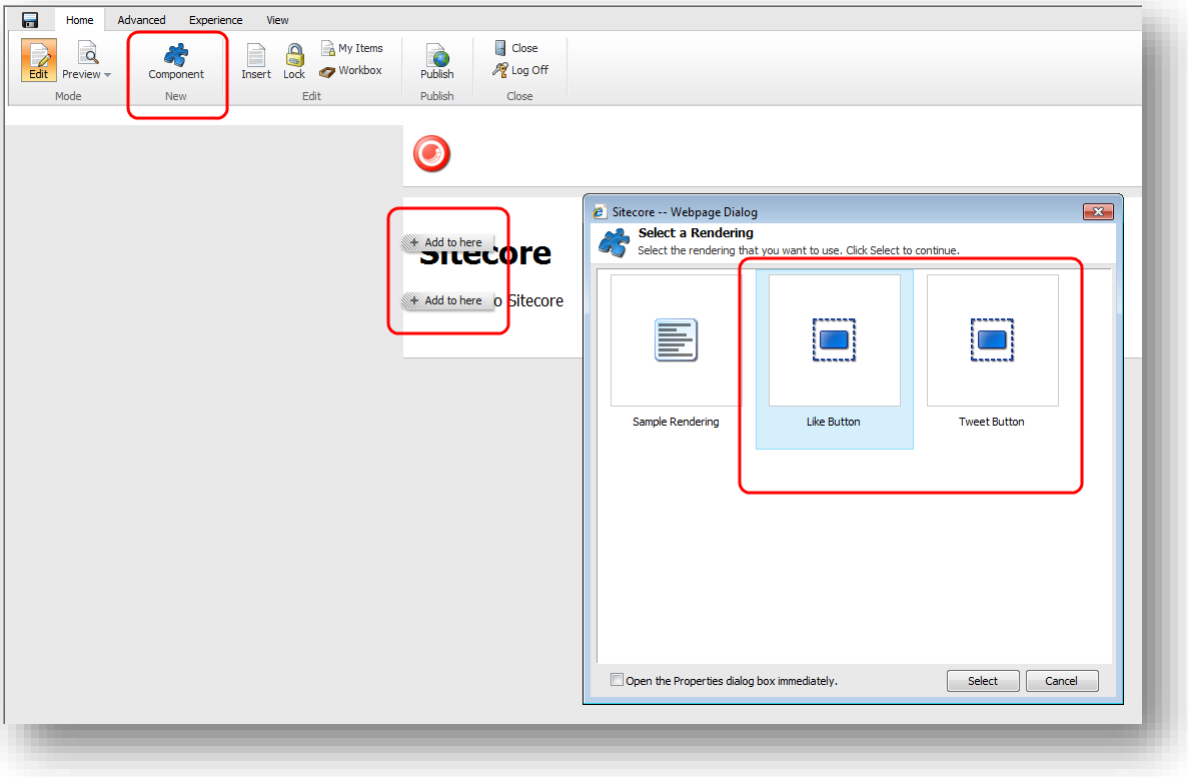
5.2 Putting Like and Tweet Buttons on the Web Page

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



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/

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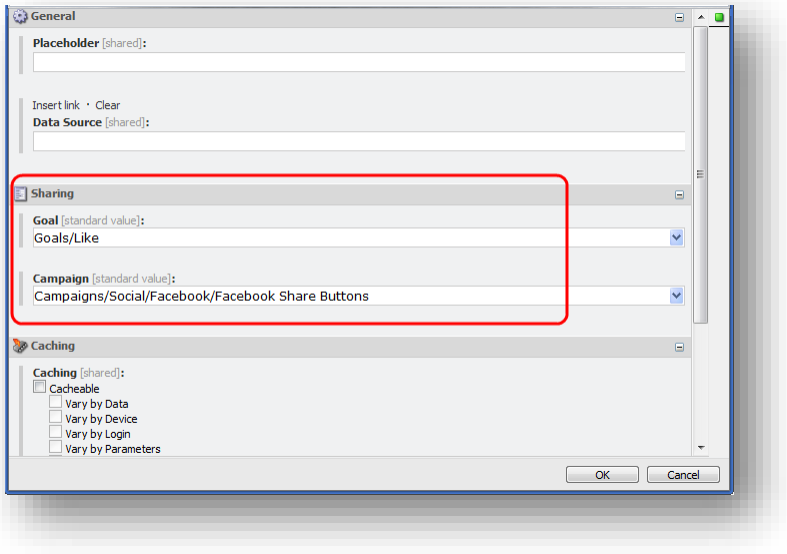
5.3 Tracking Like and Tweet Buttons Usage

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.



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.

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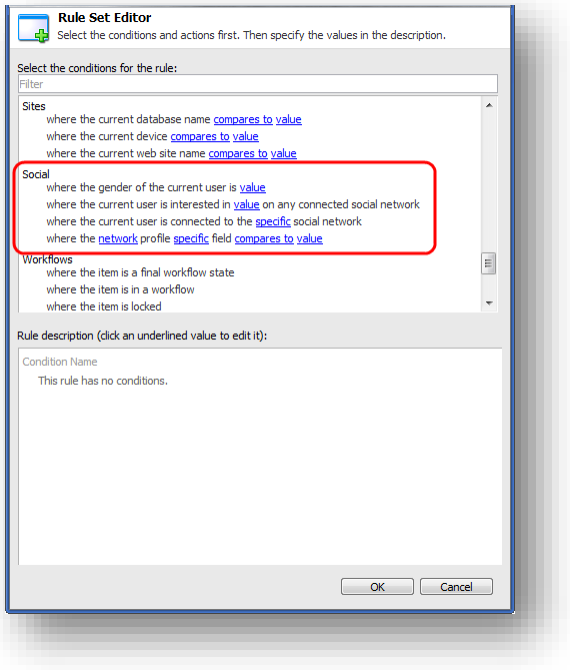
5.4 Personalization Rules for the Social Connected Module

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 value*
- *where the current user is interested in value on any connected social network*
- *where the current user is connected to the specific social network*
- where *the network profile specific field compares to value*



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.

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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.

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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

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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).

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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.

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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?
- How to Use the Error Handling Mechanism

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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.

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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.

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