

# Social Connected Module 2.1 for Sitecore CMS 7.1 Administrator's and Developer's Guide

A Quick Start Guide and Configuration Reference for Administrators and Developers



### **Table of Contents**

Chapter 1 Introduction 1.1 Features	
1.2 Architectural Requirements and Limitations	
Chapter 2 Social Connector	
2.1 Use Case	
2.2 Configuration Overview	
2.3 Configuring Access to Social Networks	11
2.3.1 Creating and Configuring a Facebook Web Application	11
2.3.2 Creating and Configuring a Twitter Web Application	13
2.3.3 Creating and Configuring a LinkedIn Web Application	
2.3.4 Creating and Configuring a Google+ Web Application	
2.4 Configuring Access to the Visitor's Profile Information	
2.4.1 Web Application Access Request for Facebook, LinkedIn and Google+	
2.4.2 Twitter Web Application Access Request	
2.5 Placing Social Connector Controls on a Web Page	
2.6 Mapping the Fields in the Visitor Profile	
2.7 Synchronizing User Information	
2.8 Disabling the Attachment of a Visitor's Social Network Accounts to their User Profile	
Chapter 3 Posting Messages to Social Networks when a Goal is Triggered	
3.1 Configuration	
3.1.1 Use Case	
3.1.2 Configuration Actions	
3.2 Creating a Message	
3.3 Asking the Visitor if they Want Messages Posted Automatically	
3.4 Placing Goal Context Information in the Message Body	
Chapter 4 Posting Content Messages to Social Networks	
4.1 Use Case	
4.2 Configuration Overview	
4.2.1 Generating URLs.	
4.3 Configuring Access to Social Networks	
4.3.1 Facebook	
4.3.2 Twitter	
4.3.3 Social Marketer Messages	
4.4 Creating a Network Account Item	
Deleting a Network Account Item	
4.5 Creating a Social Marketer Account Item	
Deleting a Social Marketer Account Item	
4.6 Customizing a Workflow	
4.7 Creating a Message	
4.7.1 Posting Messages Automatically when Publishing Content Items	47
4.8 Reviewing Messages	48
4.8.1 Default Workflows	
Social Message Workflow	
Social Marketer Message Workflow	
4.9 Tracking Statistics on a Content Message	
Chapter 5 Analytics Features	
5.1 Tracking Campaign Statistics on a Content Message	
5.2 Putting Like and Tweet Buttons on the Web Page	
5.3 Tracking Like and Tweet Buttons Usage	
5.4 Personalization Rules for the Social Connected Module	
Chapter 6 Developer's Notes	
6.1 Working with Detached Messages	
6.2 The Social Connected Module Pipelines	
6.2.1 CreateSocialMessage Pipeline	

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6.2.2 ReadSocialMessage Pipeline	62
6.2.3 PostSocialMessage Pipeline	
6.2.4 BuildSocialMessage Pipeline	62
6.2.5 MatchUser Pipeline	
6.3 Configuring the Messages Search	64
Chapter 7 Tips and Tricks	65
7.1 The Security Roles Used in the Social Connected Module	66
7.2 How to Use the Error Handling Mechanism	67
7.2.1 Error Handling on the Website	



# **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 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 configureGoal 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 Social Connected module provides the following features:

#### SocialConnector

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 timeline 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 timelines of the selected social network accounts when you publish Sitecore items. You can also post messages manually without publishing Sitecore items.

#### **ReviewingMessages**

You can place a message in a workflow. Workflows ensure that messages move through a predefined set of states before you can post them, usually intended to ensure that content receives the appropriate reviews and approvals before posting to a social network.

#### 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 timeline or the Twitter timeline.



### **1.2** Architectural Requirements and Limitations

The 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 *SitecoreScaling 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 Social Connectedmodule 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 Social Connectedmodule 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:

- Use Case
- Configuration Overview
- 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 Use Case

This use case outlines how a website visitor uses their Facebook credentials to log in to a website.

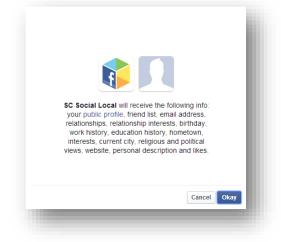
To connect with Facebook credentials:

1. A website visitor navigates to the website:

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.



2. 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.

#### Note

An administrator can configure the number of the fields that the web application requests access to. For more information about that, see the section *Configuring Access to the Visitor's Profile Information*.



If the visitor grants access to their profile information, the social network asks the visitor to grant the web application of the website access to post information to the social network.



Then 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.

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



### 2.2 Configuration Overview

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.



### 2.3 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.

### 2.3.1 Creating and Configuring a Facebook Web Application

To create and configure a web application for Facebook:

1. Go to https://developers.facebook.com/appsand create a new web application.

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 referr above.	ring to the documentation below, or create an app by clicking on the 'Create New App' button
		on your Website allows you to create a more personalized, social experience using ch as the Like Button and simplifies your registration and sign-in process using Login stration Plugin

For more information about how to create a new web application, go to <u>https://developers.facebook.com/docs/web/tutorials/scrumptious/register-facebook-application/</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 ► Basic	
Basic		
Permissions		
Payments	Norman Furniture	
Realtime Updates API	App ID: 351620224868989	
Advanced	App Secret: 4853aa241849661bb35b52f33b2a805c (r	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 en	ter
Related links	Category: [?] Other O	hoose a sub-category 👻
Related links	Hosting URL: (?) You have not generated a URL throug	h one of our partners (Get one)
Use Debug Tool Use Graph API Explorer	Sandbox Mode: [?]	
See App Timeline View	Select how your app integrates with Facebook	
Promote with an Ad Delete App	✓ Website with Facebook Login	×
	Site URL: [?] http://hostname.com	
	App on Facebook Use my app inside Facebook.com	n.
	Mobile Web Bookmark my web app on Faceb	ook mobile.
	✓ Native iOS App Publish from my iOS app to Face	book.
	✓ Native Android App Publish from my Android app to	Facebook.
	Page Tab Build a custom tab for Facebook	2

- 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/applicationtemplate.

#### 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

Application     (1 of 2)     Dest from Template     Edt     Dest from Template     Copy T     Duplicate ~     Duplicate ~	
h 🔍 🥄	Content Schule Content
<ul> <li>⇒ Sisteore</li> <li>⇒ Content</li> <li>⇒ Mome</li> <li>⇒ Social</li> <li>⇒ Media Library</li> <li>⇒ System</li> <li>⇒ System</li> <li>⇒ System</li> <li>⇒ Coloary</li> <li>⇒ Coloary</li> <li>⇒ Languages</li> <li>⇒ Markeing Center</li> <li>⇒ Modules</li> <li>⇒ Problesing targets</li> <li>⇒ Social</li> <li>⇒ Social</li></ul>	Vorman Facebook Connector         Quick Info         Item ID: (B8D2C441-265A-4075-871D-0966EDF8156F)         Item Name: Norman Facebook Connector         Item Rath: (pitecore/system/Social/Applications/Norman Facebook Connector         Template: (sitecore/templates/system/Social/Applications- (80158844-6050-4C56-9808-435A77AA5809)         Created From: [unknown]         Item Owner: sitecore/admin         Data         ApplicationId (inbred):         2329297457         ApplicationSecret (inbred):         S573ffa292097dd16abfb3c         Networks/Facebook

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

### 2.3.2 Creating and Configuring a Twitter Web Application

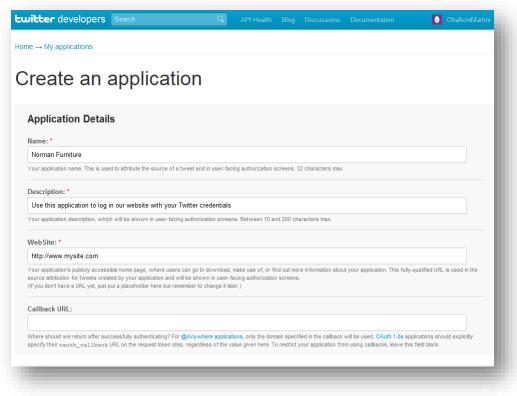
To create and configure a web application for Twitter:

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

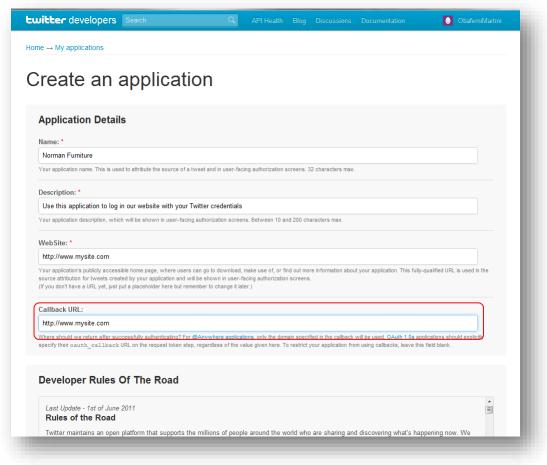


2. In the web application, in the Application details section, fill in all the required fields.





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

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

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

sitecore/templates/system/social/applicationtemplate.

#### 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:

Application     (1 of 2)     Dept T	
Edit     Insert ©     Operations       h     Image: Second sec	Content Conte
General Linedin Default Application     General A	Networks/Twitter

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

#### 2.3.3 Creating and Configuring a LinkedIn Web Application

To create and configure a web application for LinkedIn:

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

t of Applications	
Company	Application Name
Norman Furniture	Norman Furniture
Add New Application Back to LinkedIn Developer Network	
In.com Home   <u>About</u>   <u>Blog</u>   <u>Careers</u>   <u>Advertising</u>   <u>Recruiting Solutions</u>   <u>Tools</u>   <u>Deve</u> Int © 2011 Linkedin Corporation. All rights reserved.   <u>User Agreement</u>   <u>Privacy Policy</u>   <u>Copyrigi</u>	elopers Upgrade Your Account

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

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3. In the **OAuth User Agreement** section, in the **OAuth 1.0 Accept Redirect URL**field, enter the URL of the web page where you want to place the login controls.

Contact Info			
* Developer Contact Email:	dev_nf@nf.com		
* Phone:	+380 94 4578984		
Business Contact Email:			
Phone:			
DAuth Keys			
API Key:	8liva6losj0s		
Secret Key:	IEDu6XbiydhFRTZt Don't share this secret with anyone.		
	Generate Token		
DAuth User Agreement			
Default Scope:	r_basicprofile	r_fullprofile	r_emailaddress
	r_network	r_contactinfo	rw_nus
	rw_groups	w_messages	rw_company_admin
	Selecting both r_basicprofile and r_fu checked.	ullprofile is redundant. r_basicpr	ofile will be selected if neither r_basicprofile nor r_fullprofile is
OAuth 1.0 Accept Redirect URL:	http://www.mysite.com	they grant access. Only used	f you do not pass in the cauth_callback parameter in the requestToken
OAuth 1.0 Cancel Redirect URL:			udalog. If specified, this field will be used for the Cancel button redirect, leter oauth_problem with the value user_refused.
App Logo Secure URL:			
	URL of an 80x80 logo for your app. S	SL is required.	
* Agreement Language:	English	•	

The OAuth 1.0 Cancel Redirect URL field must be blank.

- 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/applicationtemplate.

#### 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:

Image: Second	Image: Cup Sector         Image: Cup Sector
earch 🔍 🔍 🔻	Content 3
Bestecore     Bestecore	Circle Content Application
(B) D Layout     (B) Media Library     (C) Social     (C) Social     (C) Social     (C) Social	Item ID: {05CA0CC5-5750-49F6-8D07-141569797EBC} Item Name: LinedIn Default Application Item Path: /gitecore/system/Social/Applications/Default/LinedIn Default Application
	Template: /sitecore/templates/System/Social/Application - (80158844-6D50-4C56-9808-435A77AA5805 Created From: [unknown] Item Owner: sitecore admin
modules     m	Data ApplicationId [shared]: Chy1y
⊕	ApplicationSecret [shared]: qpWyWHNvCK
Facebook Default Application     Google Default Application     LinedIn Default Application     Twitter Default Application     Morman Facebook Connector	Retwork [shared]: Networks/Linked In
A Norman Facebook Connector     A Norman Twitter Connector     A Norman Twitter Connector     A Societary Socie	

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

### 2.3.4 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:

Start using the Google APIs console         to manage your API usage         Use Google APIs project will let you:         Use Google APIs beyond anonymous limits.         Monitor API usage and control API access.         Share API management with a team.         Create project	oogle apis	
<ul> <li>Use Google APIs beyond anonymous limits.</li> <li>Monitor API usage and control API access.</li> <li>Share API management with a team.</li> </ul>		
<ul> <li>Monitor API usage and control API access.</li> <li>Share API management with a team.</li> </ul>		Creating an APIs project will let you:
		<ul> <li>Monitor API usage and control API access.</li> <li>Share API management with a team.</li> </ul>

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

PI Project	All (29) Active (0) Inactive (29)			
Rename… Delete…	All services Select services for the project.			
Recent projects	Service		Status	Notes
No recent projects Other projects	AdSense Management API	0	OFF	Courtesy limit: 10,000 queries/day
Open	Analytics API	0	OFF	Courtesy limit: 50,000 queries/day
Create Undelete	Audit API	0	OFF	Courtesy limit: 10,000 queries/day
	Blogger API	0	Request access	Courtesy limit: 1,000 queries/day
	🔰 Books API	0	OFF	Courtesy limit: 1,000 queries/day
	31 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	
	Soogle 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+ APItoOn.

🞮 Google Play Game Services	0	OFF	Courtesy limit: 50,000,000 requests/day
Soogle+ API	0		
Stoogle+ Domains API	0	OFF	Courtesy limit: 10,000 requests/day

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

orman Furniture	API Access
Overview	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 Create an OAuth 2.0 client ID
	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)

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- 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 IDandClient secret fields.

Overview	API Access To prevent abuse, Google places limits on API requests. Using a valid OAuth token or API key allows you to exceed anonymous limits by conne
Services	
Team	Authorized API Access
API Access	OAuth allows users to share specific data with you (for example, contact lists) while keeping their usernames, passwords, and other information
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
	Edit branding information Client ID for web applications Client ID: 862916470769.apps.googleusercontent.com
	Client ID for web applications
	Client ID for web applications Client ID: 862916470769.apps.googleusercontent.com
	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
	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

#### 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/applicationtemplate.

#### 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:

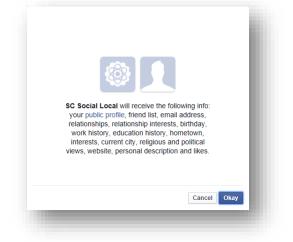
Pe Edit → Edit → E	<sup>™</sup> Copy To <sup>™</sup> Delete <sup>™</sup> Move To <sup>™</sup> Delete <sup>™</sup> Cipboard <sup>™</sup> Display Name <sup>™</sup> Cipboard
rch	🔍 🔽 🞯 Content 🔍
isitecore     Content	Google Default Application
Ga Home     Ga Layout	Quick Info
Layout     Media Library	Item ID: {95C56197-107A-4094-8885-D19E32F8B4AC}
Social	Item Name: Google Default Application
🖃 🔛 System	Item Path: /sitecore/system/Social/Applications/Default/Google Default Application
C Aliases	
Dictionary	Template: /sitecore/templates/System/Social/Application - {8015BB44-6D50-4C56-980B-435A77AA5B09}
<ul> <li>Canguages</li> <li>Anarceting Center</li> </ul>	Created From: [unknown]
Modules	Item Owner: sitecore admin
	Data
🗉 😋 Publishing targets	ApplicationId [shared]:
🗷 📓 Settings	9643579
🗏 🔕 Social	
B      Accounts     G  G    G	ApplicationSecret [shared]:
Graphications     Graphications     Graphications	tLV-J-ctDApm3zsmzm
G Facebook Default Application	
Google Default Application	Network [shared]: Networks/Google+
DiredIn Default Application	
Twitter Default Application	
Norman Facebook Connector Norman Twitter Connector	
<ul> <li>Norman Twitter Connector</li> <li></li></ul>	
Obsolete Messages	
⊕ 🕅 Tasks	

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



### 2.4 Configuring Access to the Visitor's Profile Information

When a 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.

# 2.4.1 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.netw ork_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" />
```

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 <u>https://developers.google.com/+/api/latest/people</u>.

### 2.4.2 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 WriteorRead, Write and Access direct messages check box.

Developers Search	Q	API Health	Blog Discussion	s Documentation	ObafemiMar
e → My applications					
orman Furnitui	e				
Details Settings OAuth tool	@Anywhere do	omains R	eset keys Dele	ete	
Application Dataila					
Application Details					
Name: * Norman Furniture					
Your application name. This is used to attribute the so	surce of a tweet and in	n user-facing auth	prization screens 32 cha	aracters max	
our application nume. This is used to attribute the se		ruser-rueing uutin	5120001 3010013. 32 010	autoro max.	
Description: *					
Use this application to log in our website wi	-				
/our application description, which will be shown in	user-facing authorizat	ion screens. Betw	een 10 and 200 characte	ers max.	
Vebsite: *					
http://www.hostname.com					
Your application's publicly accessible home page, wh source attribution for tweets created by your applica (If you don't have a URL yet, just put a placeholder he	tion and will be shown	n in user-facing au		ormation about your application	This fully-qualified URL is used in the
Application Icon					
Change icon:					
Choose File No file chose	n				
Maximum size of 700k. JPG, GIF, PN	IG.				
Application Type					
Application Type					
Access:					
© Read only ◉ Read and Write					
Read and write Read, Write and Access direct messages	1				
	te: @Anywhere applic	ations require rea	d & write access.		

3. Click **Updatethese 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/1.1/get/users/show</u>.



### 2.5 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. For the MVC layout, use the Social Connected renderings in the sitecore/layouts/Renderings/Social MVC/Connectorfolder. You can fully customize these controls (change images, texts, and so on). To have the renderings work with the MVC layout, in the \Website\Global.asax file, insert the following strings to the Application Strart method:

```
public void Application_Start() {
    AreaRegistration.RegisterAllAreas();
}
```

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

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 code sample, see the section *Disabling the Attachment of a Visitor's Social Network Accounts to their User* Profile.



### 2.6 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.netw ork 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/1.1/get/users/show. .

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

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



### 2.7 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 profileson 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. However, you can use the new parameter in the LoginUser and AttachUser methods to configure the module so that it receives all the user information at the same time.

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/SynchronizeSocialMediaInfo 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:

 In the [website\_root]\app\_config\include\sitecore.social.config file, in the scheduling section, set the interval value:

```
<scheduling>
  <!-- Agent to process social data daily update. -->
  <!-- To enable it set the interval value. -->
    <agent type="Sitecore.Social.Client.Tasks.SynchronizeSocialMediaInfo"
method="SynchronizeData" interval="00:00:00" />
    </scheduling>
```

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

The 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 by default. 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)
const bool updateSocialProfileAsync = true;
      var connectorClientManager = new ConnectorClientManager();
      if (!Sitecore.Context.User.IsAuthenticated)
      {
        connectorClientManager.LogOnUser(
          "Facebook",
          new ApplicationCredentials
            ApplicationKey = "<your app key>",
            ApplicationSecret = "<your app secret>"
          },
          updateSocialProfileAsync);
      }
      else
      {
        connectorClientManager.AttachToUser(
          "Facebook",
          new ApplicationCredentials
          {
            ApplicationKey = "<your app key>",
            ApplicationSecret = "<your app secret>"
          },
          updateSocialProfileAsync);
      }
```



# **Chapter 3**

# Posting Messages to Social Networks when a

# Goal is Triggered

The 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 installed and that Social Connector is configured on the website.

For Facebook, you can post messages both to the visitor's timeline and to their 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 ContextInformation 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 timeline 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 Overview.* 

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 ContextInformation in the Message Body*.

#### Note

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



### 3.2 Creating a Message

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

#### Note

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

To edit the message text:

- 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.

nese messages will be	posted to the social netwo	rks when goal will be trig	igered.		
Select the ta	arget network				
f 🗹					

- 3. In the **Messages**dialog box, click the **Create a FacebookMessage**button **f**or the**Create aTwitterMessage**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 <code>Sitecore/Social/Messages</code> 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 because Facebook structures the links according to Facebook's design.

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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 timelines, you must disable sending of messages by default and create a UI control to ask the visitor what they prefer:

- In the [website\_root]\app\_config\include\sitecore.social.config file, set the value of the Social.AllowMessagePostingByDefault setting to false.
- 2. Use the Sitecore API to create a UI control that asks the visitor whether or not they want to allow the Social Connectedmodule to send messages to their social network timelines.

Use the following methods of the Sitecore.Social.Api.PostingPreferenceManager class:

- o GetPostingPreference
- o SetPostingPreference.

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

var postingPreferenceManager = new PostingPreferenceManager();

var status = postingPreferenceManager.GetPostingPreference(Sitecore.Context.User, messageId).AutomaticPostingPreference;

var newStatus = status == AutomaticPostingPreference.Allowed ?
AutomaticPostingPreference.Denied : AutomaticPostingPreference.Allowed;

postingPreferenceManager.SetPostingPreference(Sitecore.Context.User, messageId, newStatus);



### 3.4 Placing Goal ContextInformation 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

Sitecore.Social.Client.Api.SocialPageEventClientManager class and the TriggerSocialPageEvent 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=""></string,>
{
{
"username", Sitecore.Context.User.Name
}
};
<pre>var socialPageEventClientManager = new SocialPageEventClientManager();</pre>
<pre>socialPageEventClientManager.TriggerSocialPageEvent("Login", parameters);</pre>



# **Chapter 4**

# **Posting Content Messages to Social Networks**

The 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 timeline on Facebook and to a Facebook page. You can post messages (tweets) to the timeline of a Twitter user who has used the web application to create a Twitter account.

The Social Connected module lets you create social marketer messages. A social marketer message is a request to a social media marketer. In this request, an author informs the social media marketer that new content is ready to be promoted in social networks. The media marketers must have access to Sitecore Workbox to be able to work with social marketer messages.

You can use the standard Sitecore workflow functionality to make sure the messages are reviewed before they are posted to social networks.

This chapter contains the following sections:

- Use Case
- Configuration Overview
- Configuring Access to Social Networks
- Creating a Network Account Item
- Creating a Social Marketer Account Item
- Customizing a Workflow
- Creating a Message
- ReviewingMessages
- Tracking Statistics on a Content Message



### 4.1 Use Case

This use case outlines how the module automatically posts messages to a social network when a new webpage is published on the website. All the messages are reviewed before they are posted to a social network.

Your company produces and sells smartphones. When the company produces a new smartphone, a new web page is created on the website describing the features. To attract more attention to the new model, you can automatically post messages to your website's timeline on Facebook or to the corresponding timeline on Twitter informing that you have unveiled a new product. This message can also contain the link to the new webpage. You can assign a campaign to thislink, so you can view DMS statistics.

Your company has a set of accounts in various social networks:

- A Facebook fans page
- A Facebook official page
- A Twitter official timeline

In addition, your company has a media marketer who promotes the company products on social networks.

Youcontrol who creates, edits, approves, and posts social messages to social network accounts:

- Messages for the Facebookfans page are written and posted by content authors without reviewing.
- Messages for theofficial pages are written by content authors, reviewed by management, and posted by authors.
- Content authors create social marketer messages in which they ask media marketers to post messages to specific social networks.

This was an example of how you can use the Social Connected module to post content messages to social networks.



### 4.2 Configuration Overview

To configure the posting of content messages:

- 1. Create and configure a web application on the social network and create a Sitecore item for the web application. The web application links the module with the social network.
- 2. Create a Sitecore item for the social network account or the social marketeraccount.
- 3. Create a message and either post it immediately to the social network or post it later when you publish the Sitecore item.

To configure social marketer messages:

- 1. Create a Sitecore item for the social marketer account.
- 2. Create a social marketer message.

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

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

For more information about how to create a social marketer account item, see the section *Creating a Social Marketer Account Item*.

For more information about how to implement a custom workflow for messages, see the section, *Customizing a Workflow*.

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

#### 4.2.1 Generating URLs

In a single-site solution, where the Content Management and Content Delivery servers are on different domains, specify the content delivery URL in the Sitecore.Social.config file, in the Social.LinkDomainattribute.

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.



### 4.3 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.

#### 4.3.1 Facebook

To configure the 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 create a Facebook account item, see the section *Creating a Network Account Item*.

#### 4.3.2 Twitter

To configure the 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 how to create a Twitter account item, see the section *Creating a Network Account* Item.

#### 4.3.3 Social Marketer Messages

Content authors write a social marketer message and pass it to media marketers via workflow states. Media marketers post the message to social networks using external tools.

To configure social marketer messaging:

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

For more information about how to create a social marketer account item, see the section *Creating a Social Marketer Account Item*.



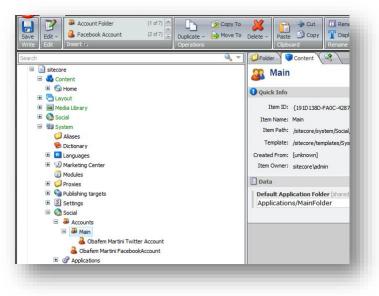
## 4.4 Creating a Network Account Item

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/accountsfolder.
- 2. Click the Account Folder insert option and enter the name of the folder.
- 3. In the new folder, on the **Content** tab, in the **Default Application Folder** field, specify the application folder.

The web applications in the application folder areused 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/accountsfolder and select an account folder.
- 2. To start the Add a Social Network Account wizard, click the FacebookAccount, Twitter Account, LinkedIn Account, Google+ Accountinsert option.

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



## Network Application Page

		En al
Social Network:		
Facebook		20
Network Application:		
FB App		
where an address of the second second	• 10	and an Mala Association
When you click Next, a browser window complete the authorization process.	opens. In this window, enter your social network o	redentials to
	< Back Next >	Cancel

In the **Network Application** field, select the web application that the account should use to cooperate with the social network.

#### **Authentication Page**

Please wait while u	he authorization proce	ss is completed.		<b>H</b>	Ð
		ation is in progr	<del>2</del> 55		
		< Back	Next >	Cancel	



#### Note

An authentication session timeout is set to 60 seconds by default. During this period, the user can log in to the social network. If the user does not log in to a social network within this timeframe, the wizard stops. You can change this default timeout parameter in the social.config file, in the Social.AddNetworkAccountWizard.AuthenticationTimeout setting.

As a 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 posts messages to the timeline of this user or its pages.

Sign Up Fa	cebook helps you connect and share w	ith the people in your life.
	Facebook Login	
	Log in to use your Facebook account wi	the constrained
	Eog in to use your Pacebook account wi	ut se social Local.
	Password:	
	Passworu:	Keep me logged in
		Log In or Sign up for Facebook
		Forgot your password?
	English (US) Vknajiyoska, Español, Portug	guês (Brasil) Francais (France) Deutsch Italiano العربية 同न्दी 中文(简体)

To define the user groups that can see the activity from the web application on Facebook, click the drop-down list and select one of the user groups.

	SKor would like to post to cebook for you.
k Friends ▼	Okay Skip
Friends of Friends	
🗸 🎎 Friends	
Only Me	
<ul> <li>Only Me</li> <li>Custom</li> </ul>	
& Custom	

#### Note

To create an account, you must set all the required permissions to Allow.

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#### Select a Profile or Page

On the **Select a Profile or Page**page, you specify the profile or page that you want the module to update.

Select the profile or the page that y the wall of a social network profile o	rou want to use on the social network.You can select r an assigned page.
Profile or Page:	
Furniture	<b>▼</b>
	< Back Next > Cancel

The module can post messages to the user's timeline or to any assigned Facebook pages. In the drop-down list, select where you want to post messages to.

#### **Social Network Account**

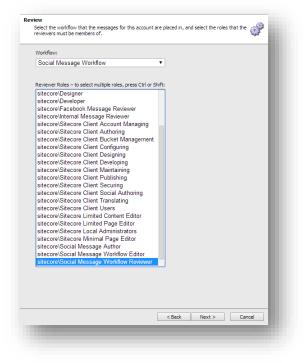
On the **Social Network Account** page, enter the name for this new network account. You can also provide additional information about the account in the **Account Description** and **Language**fields.

Specify the details for the social network account.	
Name:	
FCB Page Facebook Account	
Description:	
Our sports page	
Language:	
English	
	< Back Next > Cancel



#### **Review Page**

On the **Review**page, select a workflow to place the messages for the account in and assign roles for the reviewer.



For more information about security roles that you must assign to a reviewer, see the section, *ReviewingMessages*.

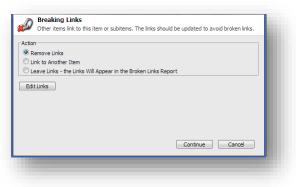
#### **Final Page**

On the last page of the wizard, click Finish to close it.

A new account item is added to the **Content Tree**.

#### **Deleting a Network Account Item**

You can delete a network account item as a standard Sitecore item. When you click **Delete the item** button, the **Breaking Links** dialog box appears:



If the item that you want to delete has attached messages, those messages are not deleted. However, the **Link to another item** option does not link the existing messages to another item. You must create a new message and move the content from the existing message to the new one.

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## 4.5 Creating a Social Marketer Account Item

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

To create an account item:

- 1. In the **Content Editor**, navigate to the sitecore/system/social/accountsfolder and select an account folder.
- 2. To start the **Createa Social Marketer Account** wizard, click the **Social Marketer Account** insert option.

The **Createa Social Marketer Account** wizard guides you through the process of creating an account.

#### Social Marketer Account Page

On the **Social Marketer Account**page, enter the name for this account. You can also provide additional information about the account in the **Description** and **Language** fields.

Create a socia	I marketer account that is responsib	ble for approving and posting messages on soo	cial 🕎
media.			
Name:			
Social Ma	rketer Account Promo		
Description:			
Account	or our marketer Ronald Grape	9	
Language:			
English			
		< Back Next >	Cancel



#### **Review Page**

On the **Review**page, select a workflow to place the messages for the account in and assign roles for the reviewer.

Social Marketer Message Workflow	
sitecore\Developer sitecore\Facebook Message Reviewer sitecore\Sitecore Client Account Managing sitecore\Sitecore Client Account Managing sitecore\Sitecore Client Developing sitecore\Sitecore Client Developing sitecore\Sitecore Client Developing sitecore\Sitecore Client Maintaining sitecore\Sitecore Client Maintaining sitecore\Sitecore Client Securing sitecore\Sitecore Client Social Authoring sitecore\Sitecore Client Translating sitecore\Sitecore Client Translating sitecore\Sitecore Client Users sitecore\Sitecore Client Translating sitecore\Sitecore Client Translating sitecore\Si	
sitecore\Social Marketer Message Reviewer sitecore\Social Message Author sitecore\Social Message Workflow Reviewer sitecore\Social Message Workflow Reviewer sitecore\Twitter Message Reviewer	

For more information about security roles that you must assign to a reviewer, see the section, *ReviewingMessages*.

#### Final Page

On the last page of the wizard, click Finish to close it.

A new account item is added to the **Content Tree**.

#### **Deleting a Social Marketer Account Item**

You can delete a social marketer account item as a standard Sitecore item. For more information about deleting options, see the section *Deleting a Network Account Item*.



## 4.6 Customizing a Workflow

The Social Connected module provides a Social Message workflow that contains two states: *Draft* and *Awaiting Approval*. You can create your own workflow and place application messages into it.

To enable a custom workflow:

1. Create a workflow.

For more information about working with a workflow, see the *Workflow Cookbook* on the <u>Sitecore Developers Network</u>.

- 2. Create security roles that have access to the workflow states and commands.
- 3. If you have several reviewers responsible for different social networks accounts, create a security role for each reviewer.
- 4. Create a social network account. In the **Create a Network Account** wizard, specify the new workflow and the roles for the reviewers.
- 5. Create users for authors and reviewers.

A user that is assigned to an author must be a member of the following security roles:

- o sitecore\Author
- sitecore\Social Message Author
- The role that you created in step 2 of this procedure. This rolegrants access to the appropriate states of the workflow.

A user that is assigned to a reviewer must be a member of the following security roles:

- o sitecore\Author
- The role that you created in step 3 of this procedure—it grants access to the messages of the corresponding social network account.
- The role that you created in step 2 of this procedure—it grants access to the workflow states in which the messages wait for approval.

For more information about security roles, see the section *TheSecurity Roles Used in the Social Connected Module.* 



## 4.7 Creating a Message

When you have configured the web application and created a Sitecore item for the social network or the social marketer 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 Messagesdialog box, click the Create a Facebook Message button for the Create a Twitter Message button or the Create a Social Marketer Message button.

Facebook Message	
Message [shared]:	62960
Hi all, check out photos in our gallery.	02,00
	$\sim$
	$\sim$
nsert Link • Insert Media Link • Insert External Link • Insert Anchor • Insert Email • Insert JavaScript • Follow • Clear	
ink - is displayed at the end of the message by default [shared]:	
/Home.aspx	
Create Campaign Campaign - is triggered when a visitor clicks the link [shared]:	
Campaigns/Social/Facebook/Facebook Content Messages	×
irowse · Properties · Clear · Refresh .ink Image [shared]:	
/Chrysanthemum	
Dimensions: 1024 x 768 Default Alternate Text: "Chrysanthemum"	
.ink Title [shared]:	
.ink Description [shared]:	
Account [shared]:	
All Selected	
Obafemi Martini Facebook Account	
	•
ost automatically (shared).	
Post automatically [shared]:	
	OK Cancel

- 4. In the Facebook Message, Twitter Message or Social Marketer Message dialog box, in the Message field, enter the text of the message.
- 5. In the **Link** field, enter the link to the webpagethat 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 **Post automatically**. You cannot use this option for social marketer messages.

#### Note

If you use a workflow for account messages, only the messages in the final workflow state can be posted to a social network.

- 10. For asocial marketer message, you can enter a comment to a media marketer in the **Comments** field.
- In the Account field, select the social network or social marketeraccounts that you want to post the message to. If you select several accounts, several messages are created – one message for every selected account.
- 12. Click **OK** to close the dialog box.
- 13. In the **Messages** dialog box, click**Post now**to post the message immediately.

Select the target network	
f 🗾	
Edit · Delete	Post now
🚨 Obafemi Martini Twitter Account	Ready to Post
Visit a new smartphone page.	
Edit • Delete	The message will be posted automatically Post now
Obafemi Martini Facebook Account	<u>Draft</u> <del>▼</del>
-	<u>Draft</u> +
Cobafemi Martini Facebook Account	Draft +
-	Draft

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, in the **Text** field, insert the \$link token and in the **Link** field, enter the URL. 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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## 4.7.1 Posting Messages Automatically when Publishing Content Items

The Social Connected module uses a scheduled task called *Post Flagged Messages* to post content messages automatically after you publish the Sitecore items that are related to the messages.

The *Post Flagged Messages* task is stored in the *sitecore/system/tasks/schedules/social/* folder. The task is ready to use and is configured to post every hour. You can customize this schedule so that messages are posted to the social network at the most appropriate time. However, the messages cannot be posted at the exact same time as the content items are published.

#### Note

If you use a workflow for account messages, only the messages in the final workflow state can be posted to a social network.



## 4.8 ReviewingMessages

You assign a workflow to all the messages for the specific account when you create an account item.

If a message is in a workflow, it must be reviewed before you can post it to a social network.

A reviewer uses the Workbox – standard Sitecore tool to process items in workflows.

If you use default Social Connected workflows, you must assign the following security roles to a reviewer so that they can review the messages:

- sitecore\Author
- sitecore\Social Message Workflow Reviewer

For more information about the security roles that you must assign to a reviewer if you use a custom message workflow, see the section *Customizing a Workflow*.

For more information about security roles, see the section *TheSecurity Roles Used in the Social Connected Module.* 

To grant reviewers access to messages for different social networks, assign one of the following roles to a reviewer:

- sitecore\Facebook Message Reviewer
- sitecore\Twitter Message Reviewer
- sitecore\Social Marketer Message Reviewer

We recommend that you use the following combination of workflows and roles for accounts:

Social Network Account	Workflow	Reviewer Role
Facebook	Social Message Workflow	sitecore\Facebook Message Reviewer
Twitter	Social Message Workflow	sitecore\Twitter Message Reviewer
Social Marketer	Social Marketer Message Workflow	sitecore\Social Marketer Message Reviewer

For more information about all security roles that are used in the Social Connected module, see the section *TheSecurity Roles Used in the Social Connected Module*.

## 4.8.1 Default Workflows

The Social Connected module provides two workflows by default:

- The Social Messageworkflow This workflow is for messages that are posted to social networks.
- The Social Marketer Messageworkflow This workflow is for social marketer messages to deliver them to media marketers.

#### Social Message Workflow

The *Social Message* workflow is designed for messages that will be posted to social networks. It contains three states:

State	Description
Draft	When a content author creates a message, the message is assigned to the <i>Draft</i> state.



State	Description
Awaiting Approval	When the content author believes that the message is ready to be posted to a social network, they submit it to the <i>Awaiting Approval</i> state. A reviewer either submits the message to the <i>Approved</i> state or rejects it and moves it back to the <i>Draft</i> state.
Approved	When the message enters the <i>Approved</i> state, it can be posted to a social network automatically along with the content item or manually by clicking <b>Post now</b> .

#### Note

Only the messages in the Approved state can be posted to social networks.

The schema of the Social Messageworkflow is:



## Social Marketer Message Workflow

The *Social Marketer Message* workflow is designed to pass a message to the media marketer who poststhe message to social networks using external tools. The *Social Marketer Message* workflow contains four states:

State	Description
Draft	When a content author creates a message, the message is assigned to the <i>Draft</i> state.
Awaiting Post Review	When the content author believes that the message is ready to be posted to a social network, they submit it to the <i>Awaiting Post</i> <i>Reviews</i> tate. A reviewer, usually a media marketer, submits the message to the <i>Post Accepted</i> state, rejects the message and moves it back to the <i>Draft</i> state or decides that the message does not fit a social network format moving it to the <i>Post Removed</i> state.
Post Removed	The message in this state is never posted to a social network by the reviewer.
Post Accepted	The reviewer poststhe message in this state to a social network.



The schema of the Social Marketer Messageworkflow is:





## 4.9 Tracking Statistics on a Content Message

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

et network	
fresh Statistics	Posted
Witter Account	Approved
check out new gallery! cal.com/?sc_lang=en≻_camp=C792EC69-ADE9-479C-8FA6-1425E604A9DA	
Show cam	npaign reports 💌
fresh Statistics	Posted
pedova Facebook Account	Approved
check out new gallery!	
check out new gallery! Gallery http://social-local.com/?sc_lang=en≻_camp=08FFAF94+F523-452A-9F2A-1FA3292D4647 Gallery	
Gallery           http://social-local.com/?sc_lang=en8sc_camp=08FFAF94-F523-452A-9F2A-1FA3292D4647         Gallery           Gallery         Gallery	npaign reports 💌
Gallery           http://social-local.com/?sc_lang=en8sc_camp=08FFAF94-F523-452A-9F2A-1FA3292D4647         Gallery           Gallery         Gallery	apaign reports 💌
Gallery           http://social-local.com/?sc_lang=en8sc_camp=08FFAF94-F523-452A-9F2A-1FA3292D4647         Gallery           Gallery         Gallery	apaign reports 💌
Gallery           http://social-local.com/?sc_lang=en8sc_camp=08FFAF94-F523-452A-9F2A-1FA3292D4647         Gallery           Gallery         Gallery	npaign reports 💌
Gallery           http://social-local.com/?sc_lang=en8sc_camp=08FFAF94-F523-452A-9F2A-1FA3292D4647         Gallery           Gallery         Gallery	apaign reports 💌
Gallery           http://social-local.com/?sc_lang=en8sc_camp=08FFAF94-F523-452A-9F2A-1FA3292D4647         Gallery           Gallery         Gallery	apaign reports 💌
Gallery           http://social-local.com/?sc_lang=en8sc_camp=08FFAF94-F523-452A-9F2A-1FA3292D4647         Gallery           Gallery         Gallery	ıpaign repor

If you are using the 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**.

	ect the target network	
-	F 🔰 🚇	
Edit	Delete     Refresh Statistics	Poste
2 🌯	skoroedova Twitter Account	Approved
Hi	all, please check out new gallery!	
	p://social-local.com/?sc_lang=en≻_camp=C792EC69-ADE9-479C-8FA6-1425E604A9DA	
	retweets	Show campaign reports



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

#### **Automatically Updating the Statistics**

The Social Connected module uses the scheduled taskthat is called *Update Message Statistics* to update statistics. This task is stored in the Sitecore/system/tasks/Schedules/social/folder. It is ready to use. The task updates statistics atincreasing time intervals dependingon 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

 $\verb|Social.FibonacciRefreshStrategy.StopRefreshAge \ setting.$ 

#### Note

The Social Connectedmodule does not provide message statistics for social marketermessages.



# Chapter 5 Analytics Features

You can use the 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.

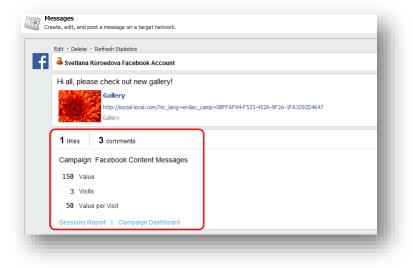
This chapter contains the following sections:

- 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



## 5.1 Tracking Campaign Statistics on a Content Message

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



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

To see the campaign statistics, click Show campaign reports.

By default, a content message usesthegeneric *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 this 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.

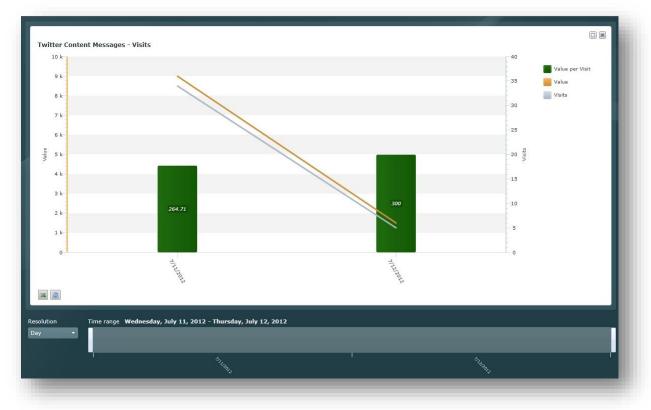
#### Note

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

🔐 Campaign	Line and the second second	ıly 13, 2012 👻					
	📑 Print	Save	14 4	Page 1 of 1 🕨 🕅 🔍 100%	Whole Report	MailReport	
			С	ampaign report		gn Id: c792ec69 Generated: Jul. 1	ade9-479c-8fa6-1425e604a9da 13, 2012
			Rep	ort 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 / CRM	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 / Subscribe / CRM	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  Advanced Experience View  Advanced Experience View  Mode Preview +  Mode New  Insert Lock  Workbox  Publish  Component New  Component New Ne	
* Add to here * Add to here o sitecore	Stecore Webpage Dialog   Select a Rendering Select the rendering that you want to use. Click Select to continue.   Image: Select the rendering that you want to use. Click Select to continue.     Select the rendering that you want to use. Click Select to continue.     Image: Select the rendering that you want to use. Click Select to continue.     Image: Select the rendering that you want to use. Click Select to continue.     Image: Select the rendering that you want to use. Click Select to continue.     Image: Select the rendering that you want to use. Click Select to continue.     Image: Select the rendering that you want to use. Click Select to continue.     Image: Select the rendering that you want to use. Click Select to continue.     Image: Select the rendering that you want to use.     Image: Select the rendering that you want to use.     Image: Select the rendering that you want to use.     Image: Select the rendering that you want to use.     Image: Select the rendering that you want to use.     Image: Select the rendering that you want to use.     Image: Select the rendering that you want to use.     Image: Select the rendering that you want to use.     Image: Select the rendering the rendering that you want to use.     Image: Select the rendering the rendering that you want to use.     Image: Select the rendering the rendering that you want to use.     Image: Select the rendering the rendering the rendering the rendering the rendering the renderi
	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.For the MVC layout, use the Social Connected renderings in the sitecore/layouts/Renderings/Social MVC/Sharing folder. To have the renderings work with the MVC layout, in the \Website\Global.asax file, insert the following strings to the Application\_Strart method:

```
public void Application_Start() {
    AreaRegistration.RegisterAllAreas();
}
```

To make sure that users can put these controls on a webpage, you must enable the controls on the appropriate placeholder:

- 1. In the **Content Editor**, navigate to sitecore/layout/placeholdersettings folder and select the placeholder item where the controls will be located
- 2. In the Allowed Controlsfield, 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 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/goalsfolder. Make sure to configured the *Like* and *Tweet* goals before using them.

Placeholder [shared]:		
Insert link · Clear		
Data Source [shared]:		
		E
Sharing		
Goal [standard value]:		
Goals/Like		~
oods) Eike		
Campaign [standard value]:		
Campaign Standard Values: Campaigns/Social/Facebook/Facebook Share Buttons		~
campaigns/social/racebook/racebook share bucchs		
Caching		Ξ.
Caching [shared]:		
Cacheable		
Vary by Data		
Vary by Device		
Vary by Login Vary by Parameters		-
	OK	Cancel

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 Social Connected module provides the following conditions:

- where the gender of the current user is value
- 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>

lect the conditions for the rule: ter	_
ites	
where the current database name <u>compares to value</u>	
where the current device compares to value	
where the current web site name compares to value	
iocial	
where the gender of the current user is <u>value</u> where the current user is interested in value on any connected social network	
where the current user is interested in <u>value</u> on any connected social network where the current user is connected to the specific social network	
where the <u>network</u> profile <u>specific</u> field <u>compares to value</u>	
Vorkflows	
where the item is a final workflow state	E
where the item is in a workflow	
where the item is locked	
le description (click an underlined value to edit it):	
	_
Condition Name	
This rule has no conditions.	
	ncel
OK Car	

The 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 <code>social.network\_name.config</code> file, in the <code>s</code>



#### Note

The where the current user is interested in value on any connected social networkcondition 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 Social Connected module uses five pipelines. This chapter describes the goals of the pipelines and their processors. In this chapter, you will also find information how to work with the detached messages using API and how to configure the message index.

This chapter contains the following sections:

- Working with Detached Messages
- The Social Connected Module Pipelines
- Configuring the Messages Search



## 6.1 Working with Detached Messages

A detached message is a message that is not bound to any content item. You can create, edit, and post detached messages using API. Once the message is posted to the social network, you can track its campaign statistics using API.

For more information about the Social Connected API, see the document, Social Connected API.



## 6.2 The Social Connected Module Pipelines

The Social Connected module uses five pipelines.

## 6.2.1 CreateSocialMessage Pipeline

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

#### **GetRoot Processor**

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

#### **CreateItem Processor**

The  ${\tt CreateItem}$  processor creates two items under the messages root item: message and source items.

#### SaveData Processor

The SaveData processor saves message data from its fields.

## 6.2.2 ReadSocialMessage Pipeline

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

#### **ReadMessages Processor**

The ReadMessages processor reads all the messages for the specified message IDs.

## 6.2.3 PostSocialMessage Pipeline

The PostSocialMessage pipeline posts the message to the social network.

#### ResolveMessagePostingProvider Processor

The ResolveMessagePostingProvider processor selects a posting provider to post the message.

#### PostMessage Processor

The PostMessage processor posts the message to the social network.

## 6.2.4 BuildSocialMessage Pipeline

The BuildSocialMessage 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 posting configuration (goal or content).

#### BuildMessage Processor

The BuildMessage processor builds the message.

#### **ReplaceTokens Processor**

The ReplaceTokens processor replaces tokens with their values.



## 6.2.5 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  ${\tt FindByEmail}$  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.



## 6.3 Configuring the Messages Search

The Social Connected module stores messages in the Sitecore/Social/Messages folder. This folder is an item bucket that has a configured index. The Social Connected module uses it to search for the messages. This index is based on the Lucene provider and the Sitecore.ContentSearch API (LINQ to Sitecore).

For more information about how to configure the search functionality, see the *Sitecore Search and Indexing Guide*.

You can change the index configuration in the following files:

\Website\App\_Config\Include\Sitecore.Social.config.

In the socialSearch/configurationsection, you can edit the index configuration.

• \Website\App\_Config\Include\Sitecore.Social.Lucene.Index.Master.config

The/sitecore/contentSearch/configuration/indexes/index section contains the index configuration for the Content Management server. This index uses the synchronous strategy. This means that the index is updated after any item in the Message folder is updated. The Sitecore job updates the index according to a schedule, which leads to some delays in updating the index. If you want to update the index faster, use the following settings:

- Social.Messages.UpdateSearchIndexSyncronously
   If this setting is set to *True*, the Social Connected module runs the index update explicitly.
   This guarantees that the index is always up-to-date. However, the usage of this setting reduces the performance of the Sitecore instance.
- Social.MessagesByContainerCacheEnabled
   If this setting is set to *True*, the Social Connected module caches index values found inside a goal item, a content item, or an empty container. If this setting is set to *False*, to see the changes in the messages, click the **Refresh** button in the **Messages** dialog box. You can change the cache size using the Social.MessagesByContainerCacheSize setting.

#### Note

The cache helps you to get the latest indexed data inside a container. Other API methods, for example, GetMessagesByWorkflowStateandGetMessagesByAccount, depend on the corresponding job execution.

• \Website\App\_Config\Include\Sitecore.Social.Lucene.Index.Web.config

The /sitecore/contentSearch/configuration/indexes/index section contains the index configuration for the Content Delivery server. This index uses the OnPublishEndAsynch strategy. The index is updated immediately after you publish items to a Content Delivery server.

If you install the Social Connected module package on the Content Delivery server, you must edit the \Website\App\_Config\Include\Sitecore.Social.Lucene.Index.Web.config file specifying the name of the Content Delivery server database in the database section. If you use one server for the Content Management and Content Delivery servers with the Master and Web databases, you can use the default settings.

If you create a custom index for the Content Management or Content Delivery server, you must specify the index ID in the corresponding setting:

- Social.Messages.Master.SearchIndex name of the Content Management server index.
- Social.Messages.Web.SearchIndex name of the Content Delivery server index.



# Chapter 7

## Tips and Tricks

This chapter contains some tips and tricks for developers and administrators. This chapter contains the following sections:

- TheSecurity Roles Used in the Social Connected Module
- How to Use the Error Handling Mechanism



## 7.1 TheSecurity Roles Used in the Social Connected Module

In the following table, lists thesecurity roles for content authors and reviewers:

Role	Description	Requires	
sitecore\Author	Permissions to the Content Editor, Workbox andMessages dialog box	Author (required) Reviewer (required)	
sitecore\Sitecore Client Social Authoring	This role is a member of the <i>SitecoreVauthor</i> role. Permissions to the <b>Messages</b> button on the Social chunk of the Publish ribbon.	Author (required) Reviewer (required)	
sitecore\Analytics Maintaining	Permissions to create goal/page event messages and campaigns for messages.	Author (optional)	
sitecore\Analytics Reporting	Permissions to view DMS reports for a message	Author (optional)	
sitecore\Social Message Author	Permissions to create, edit, and remove all messages	Author (required)	
sitecore\Facebook Message Reviewer	Permissions to edit Facebook messages	Reviewer (required)	
sitecore\Twitter Message Reviewer	Permissions to edit Twitter messages	Reviewer (required)	
sitecore\Social Marketer Message Reviewer	Permissions to edit social marketer messages	Reviewer (required)	
sitecore\Social Message Workflow Editor	Permissions to use the <i>Draft</i> state and its commands of the <i>Social</i> <i>Message</i> workflow and <i>Social</i> <i>Marketer Message</i> workflow	Author (required)	
sitecore\Social Message Workflow Reviewer	Permissions to use the Awaiting Approval state and its commands of the Social Messageworkflow. Permissions to use the Awaiting Post Review, Post Accepted and Post Removedstates and their commands of the Social Marketer Messageworkflow	Reviewer (required)	



## 7.2 How to Use the Error Handling Mechanism

The 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

```
var exceptionClientManager = new ExceptionClientManager();
    var exceptionInfo =
exceptionClientManager.GetExceptionInfo(HttpContext.Current.Request);
    if (!exceptionInfo.IsEmpty)
    {
        this.ShowExceptionInfo(exceptionInfo);
    }
```

3. Display this information to the website visitors in the same style as the website design.