CONVERTR PRODUCT GUIDE

## Convertr Connected Apps

# Facebook App Creation & Review Submission Process



## **Prerequisites**

- Your Business Manager must be verified www.facebook.com/business/help/2058515294227817
- You need to have admin permissions on the business manager
- You need to create a developer account <a href="https://developers.facebook.com/">https://developers.facebook.com/</a>
- A campaign must be set up in your Convertr instances with a Publisher, Form and Link set up.
- You are allowed up to 4 Facebook pages associated to each app

### **Creating the Facebook App**

1) Go to <u>https://developers.facebook.com/apps</u> (login with your FB account) and select Add a New App.



2) Complete the information in Create a New App ID and click Create App ID.

- Display Name is the name of the app e.g. Convertr FB Connected App
- Contact Email is your work email

Create a New App ID	
Get started integrating Facebook into your app or website	
Display Name	
The name you want to associate with this App ID	
Contact Email	
Used for important communication about your app	

3) In left side navigation, select Settings and then Basic.



4) Complete this page:

- App Domains is Convertr enterprise URL you are using e.g. https://{enterprise}.cvtr.io
- Privacy Policy URL is the privacy policy URL on your advertiser's website
- Terms of Service URL is the terms of use URL on your advertiser's website
- App Icon requires a JPG, GIF, or PNG file and the image size must be between 512 x 512 and 1024 x1024 pixels. File size limit is 5 MB.
- Business Use select Support my own business
- Category select **Business and Pages** from the drop down menu

App ID	App Secret	
1264642340326580	******	Show
Display Name	Namespace	
Convertr		
App Domains	Contact Email	
[enterprise].cvtr.io ×	benson.mensah-bonsu@convertr.io	
Privacy Policy URL	Terms of Service URL	
https://www.convertr.io/privacy-policy/	https://www.convertr.io/terms-and-conditi	ons/
App Icon (1024 x 1024)	Category	
	Business and Pages 🔻	
Convertr	Find out more information about app cate	egories here
Business Use		
This appluses Facebook tools or data to		
<ul> <li>Support my own business</li> </ul>		
Dravida convises to other husinesses		

5) Copy and store the App ID and App Secret as you will need to reference this step every time you connect to a form in Convertr. To reveal the App Secret, click the Show button.

App ID	App Secret	_
1264642340326580	••••••	Show

The App Secret will be revealed.

App ID	App Secret	
1264642340326580	ddee9482a2c8587fae58ac0be3497930	Reset

6) In the Verification Status, you need to connect your business manager to the app. Click Get Started.

ime.	permissions and features may require business or individual verification to access live data. You can start this process at any
ISINGS	
Johnes	s Verification
ion io a	s Verification
	Verification Verify Your Business on Facebook

7) Select the relevant business manager you want to connect the app to and press Submit.

Business Ver	ification for Convertr	×
	Convertr	
	Connect Convertr to a Business Manager account on Facebook	
S	elect an account below or create a new one. Apps must be nnected to a verified Business Manager account in order access certain aspects of the Facebook platform.	e to
	Select a Business Manager Account	
	Convertr	
Cancel	Create Business Manager Account	Submit

8) If your Business Manager is already verified, you should see Verified. If not, you will need to follow the steps to get verified with Facebook <u>https://www.facebook.com/business/help/2058515294227817</u>

Business Verifica	ition	
Conv ID: X	rertr XXXXXXXXXXXXXXX	Go To Verification
Business Verification Status	Verified We've successfully confirmed your business details. Thank you for helping incre people on Facebook.	ease transparency between businesses and

You may need to go through Individual Verification.

https://developers.facebook.com/docs/apps/review/#individual-verification

9) At the bottom of the page, select Add Platform.

+	Add	Platform

10) In the Select Platform pop up window, select Website.



11) In the Website section, enter the Convertr enterprise URL e.g. https://{enterprise}.cvtr.io

Website	Quick Start
Site URL	

11) Then press Save Changes in the bottom right hand corner.

12) In the left side navigation, click PRODUCTS.



13) Locate Facebook Login and click Set Up.

	K.
Faceboo	ok Login
The world's number on	ie social login product.
Pead Docs	Set Up

14) In the Client OAuth Settings section, place the Convertr enterprise URL e.g. https://{enterprise}.cvtr.io, in the Valid OAuth Redirect URIs field.

Yes	Client OAuth Login Enables the standard OAuth client token flow. Secure down which token redirect URIs are allowed with the	your application and preve options below. Disable glob	nt abuse by locking ally if not used. [?]
Yes	Web OAuth Login Enables web-based Client OAuth Login. [?]	Yes	Enforce HTTPS Enforce the use of HTTPS for Redirect URIs and the JavaScript SDK. Strongly recommended. [?]
No	Force Web OAuth Reauthentication When on, prompts people to enter their Facebook password in order to log in on the web. [?]	No	Embedded Browser OAuth Login Enable webview Redirect URIs for Client OAuth Login. [?]
Yes	Use Strict Mode for Redirect URIs Only allow redirects that use the Facebook SDK or the Strongly recommended. [?]	at exactly match the Valid C	DAuth Redirect URIs.
Valid OAuth	Redirect URIs		
[enterprise]	.cvtr.io ×		

15) In the Deauthorize section, place the Convertr enterprise URL e.g. https://{enterprise}.cvtr.io, in the field Deauthorize Callback URL. Then click Save Changes.

eauthorize			
Deauthorize Callback URL			

16) In the left side navigation, click PRODUCTS.



17) Locate Webhooks and click Set Up.



18) In Webhooks, select Page from the drop down menu, then click 'Subscribe to this topic'.

Page 💌		
User		
√ Page	You are not subscribed to this object.	
Permissions	Subscribe to this object	
Application		
Native Components		
Instagram		

19) In the Edit Page Subscription pop up window, complete the fields as below:

- Callback URL: <u>https://{enterprise}.cvtr.io/api/webhook/facebook</u>
- Verify Token: Please contact us at <a href="mailto:support@convertr.io">support@convertr.io</a> and we will provide this.

dit Page Subscription	
allback URL	
https://[enterprise].cvtr.io/api/webhook/facebook	
erify Token	
uhH3Ca0we4OdGSVPpuv8	

20) Once the URL has been verified, scroll down to the leadgen event and click Subscribe.

hours	v4.0 ▼ Test	v4.0 ¥	Subscribe
leadgen	v4.0 - Test	v4.0 🕶	Subscribe
live_videos	v4.0 - Test	v4.0 -	Subscribe

You will see the following message:



The subscription will also change:

hours	v4.0 - Test	v4.0 - Subscribe
leadgen	v4.0 - Test	v4.0 - Unsubscribe
live_videos	v4.0 - Test	v4.0 - Subscribe

21) In the left side navigation, click App Review and then Permissions and Features.



22) Locate leads\_retrieval and click Request.

<b>leads_retrieval</b> Grants your app permission to retrieve all information captured by a lead. Also requires the manage_pages permission.		/adgroup/leads/ /page/leadgen_for	<ul> <li>Requires Additional Contract Signing</li> <li>Requires Business or Individual Verification</li> </ul>	<ul> <li>Share the lead data with anyone outside of the</li> <li>Store additional information of the user outside of what was</li> </ul>	Request
and then select 'Continue'					
leads_retrieval Grants your app permission to retrieve all information captured by a lead. Also requires the manage_pages permission.	d —	/adgroup/leads/ /page/leadgen_for	<ul> <li>Requires Additional Contract Signing</li> <li>Requires Business or Individual Verification</li> </ul>	<ul> <li>Share the lead data with anyone outside of the advertiser who</li> <li>Store additional information of the user outside of what was</li> </ul>	Continue 🕤

23) Scroll down to the Complete App Verification section and click on the arrow.

#### **Complete App Verification**

Provide verification details
 Complete the following steps:
 Provide step-by-step instructions on how to access your integration, and any applicable testing credentials

24) In the App Verification Details pop up window, select Yes. In the Platform Settings, you will need to input the following information: You must complete the highlighted red details as described:

Username: [input your Convertr login username] Password: [input your Convertr login password]

1) After successfully logging in, select Connected Apps on the left side navigation bar and then select Facebook.

2) In the top left, click the Add Facebook Connection button

3) In the field labeled Facebook App ID\*, input the Facebook App ID you're currently reviewing

4) The 'Log in with Facebook' window will pop up. Select 'Continue as.....'

5) On 'What Pages do you want to use with [Facebook App Display Name]', check the relevant Facebook Page then click Next.

6) On 'What is [Facebook App Display Name] allowed to do?', make sure Yes is selected for both Manage your Pages and Access for your Pages. Then click Done.

7) Once 'You've now linked [Facebook App Display Name] to Facebook' has loaded, select OK. You will be redirected back to the previous browser window.8) New fields will appear in the Add Facebook Connection; use the following information to complete the window:

Facebook App Secret: [input Facebook App Secret]

Facebook Form: [Select Facebook Form]

Campaign: [Select a Convertr Campaign]

Publisher: [Select a Publisher, preferably 'Facebook']

Form: [Select a form]

Link: [Select a link if available]

25) The connection is complete. The first link underneath Campaign links to the campaign that will retrieve and process the leads from the Facebook page. Once you click through the link, you need to click Leads at the top of the page to see the list of leads being retrieved.

#### Then click Save.

App Verification Details	×
Is a Facebook reviewer able to access or login to your app to verify you're using permissions or features according to Facebook Platform Policy?	
Platform Settings	
Provide all the necessary details for how a Facebook reviewer can log in to your app. To add new platforms, go to the Platform Settings on the app dashboard.	
✓ Website	
Site URL: https://[enterprise].cvtr.io/ [?] Edit your website log in URL	
Provide detailed step-by-step instructions on how a reviewer can test your integration and how you are using the requested permissions or features. Include any testing credentials required to access your integration. [?]	
username:	
1. After successfully logging in, select 'Connected Apps' on the left side navigation bar and then select 'Facebook'	
2. In the top left, click 'Add Facebook Connection' the button	
3. In the field labeled 'Facebook App ID*', input the Facebook App ID you're currently reviewing	
Note: Do not provide your personal Facebook account credentials.	
Connect	21/0
Cancel	ave

26) Scroll down to the Requested Permissions and Features section and click the arrow in the 'Tell Us Why Are You Requesting leads\_retrieval' section.

Ø	Tell us how you'll use leads_retrieval	Ŵ	$\rightarrow$
	Review the policies for leads_retrieval and tell us how you intend to use it		
	Oescribe how your app uses this permission or feature		
	Agree that you will comply with allowed usage		

Your submission must include pages\_manage\_ads to use leads\_retrieval

27) In the 'Tell Us Why Are You Requesting leads\_retrieval' section, upload this video (download the file <u>here</u>) and input the information below:

'Our App will require permissions to pull lead data captured from Facebook Lead Ads into the Convertr Platform and then route to the end client CRM

- 1. The user will give access to the page
- 2. The user will submit a lead via the facebook form
- 3. The Facebook platform will store this data

4. The app will then require access to enable the lead data to transfer to the Convertr platform

5. Convertr will process the lead data and route to the end client CRM'

Then press save.

Please provide a detaile person using your app,	d description of how your app uses the permission or feature requested, how it and why it's necessary for app functionality. <sup>[7]</sup>	adds value for a
Our App will require perm the end client CRM 1. The user will give acce 2. The user will submit a 3. The Facebook platform 4. The app will then requi 5. Convertr will process t	issions to pull lead data captured from Facebook Lead Ads into the Convertr Platform and t ss to the page lead via the facebook form will store this data re access to enable the lead data to transfer to the Convertr platform he lead data and route to the end client CRM	then route to
Provide a detailed step- it is used correctly and	by-step video walkthrough of how your app will use this permission or feature s does not violate our policies. <sup>[?]</sup> Convertr Facebook Walkthrough.mp4 Drag a new file here to replace the current screencast	o we can confirm
	1 Upload File	

28). Now your application is ready for review. Click Submit for Review in the bottom right hand corner. If you're unable to submit for review, you will need to complete any incomplete section before proceeding.

Complete App Verification	
Provide verification details	$\rightarrow$
Requested Permissions and Features	
Yell us how you'll use leads_retrieval	${\rm ev} \to$
Tell us how you'll use manage_pages	
Add additional permissions and feature	ures
Complete App Settings	
Review your app settings	$\rightarrow$
	Submit for Review

29) In the Platform Onboarding Terms window, check the terms box in the bottom left corner and click Submit.

30) Press OK in the App Submission Received window. The review process can take up to 72 hours. We usually see a response within one business day.



31) Once the application has been reviewed, you'll receive an email informing you to review the results. The link in the email will click-through to the alerts page. In the respective alert, click Go to App Review.

Alerts		
Inbox (2) - Archived	App Review	attention
App Review Your App Review results are ready attention 2 October 19	The App Review results for Convertr - Con Further action may be required before your Current Request page under App Review of full results and address any outstanding qu	nected Apps are now available. r app can go live. Please go to the n your app dashboard to see the lestions.
	October 19	Go to App Review

32) In App Review Requests, click View Details in the Request History section.

App Review Requests		
efore you request permissions or fea ourself with the process.	tures, read our App Review, Sample Submissions, and Common Rejec	tion Reasons documents to familiarize
	You don't have a current request. Request Permissions or Features	
Request History		
Review completed on October 18, 2019 at 1:23 PM Requested by Joe Bloggs	Requested: leads_retrieval, manage_pages	View Details

33) In App Review Details, you should see an Approved status for 'leads\_retrieval, manage\_pages'

34) In the top right hand corner, you can switch the Status on.



OFF Status: In Development

In the Switch to Live Mode window, click Switch Mode.

Switch to Live Mode?		×
Your app won't be able to acces features that require App Review	s unapproved permis w. Learn more	ssions or
	Cancel	Switch Mode

The Status will now show as Live.



You can now utilise the app to retrieve leads from Facebook Lead Ads.

### **Additional Resources**

- About Facebook Lead Ads
- Creating a Lead Ad Create a lead generation form and the ad.
- Forms and Questions Manage and create forms and questions.
- <u>Create A Lead Ad With Prefilled Fields</u>
- Testing and Troubleshooting Create and delete test leads.
- Lead Ads Testing Tool
- Use the Leads Access Manager to customize which people, CRM or partner business/agency can download your leads.