



# SHE Technologies

A Software, Web Development & Consultant Co.

## SHE CRM Facebook Integration SOP

### 1. Provide Partial Access:

- To integrate Facebook leads into the CRM, please provide your Company Page (partial Access ) to our Company Account Username: ( **shesocialmediaagency** )
- Facebook Company Account ( <https://www.facebook.com/shesocialmediaagency/> )
- After providing access, please inform SHE Technologies that the access has been given.

### 2. Campaign Form Design:

- The form must include the following headers:
  - **full\_name**
  - **phone\_number**
  - **city**
- Definitions for each header:
  - **full\_name**: Client's name
  - **phone\_number**: Client's phone number
  - **city**: Client's city
- Always use these exact headers when designing a campaign form. If a header consists of two words, join them with an underscore and use lowercase letters (e.g., **father\_name**).
- SHE will guide you further about the campaign form so the integration works properly

## Lead Generation Form – Tracking Parameters Setup Guide

Each lead generation campaign should include standardized tracking parameters to ensure organized data management and clarity across all campaigns

### Company Name:

Enter the official name of the company running the campaign.

- ▶ Example: SHE Technologies

### Project Name:

Specify the name of the service, product, or internal system being promoted.

- ▶ Example: Accounts/ SAMS

### Campaign Name:

Mention the title of the campaign for clear reference, including the type of campaign and date/month.

- ▶ Example: SAMS sponsor ad, May 2025

### Area of Targeting:

Define the city or geographical location where the campaign is focused

- ▶ Example: Lahore

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For Example :

Form settings

Form configuration

Field names

Tracking parameters

You can include tracking parameters to help you identify where your leads come from. These fields won't appear in the form that users see when they submit their info, but you'll be able to see it when you access your leads via API, download or configured CRM.

Parameter name	Parameter value
Company Name	SHE Technologies
Project Name	CRM PHP
Campaign Name	CRM sponsor ad,May 2025
Area of Targetting	Lahore/Islamabad

Done



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