Using the Commence RM Social Search Feature

The Social Search feature will require configuration by your database administrator.

COMMENCE SOCIAL SEARCH

In order to utilize the Social Search feature you will need to add three new custom fields to your database; LinkedIn, Facebook and Twitter, then configure the feature so it is mapped to your Commence application categories and fields. This can be done by following the steps below.

Note: The Social Search feature is enabled and pre-configured in the Commence Tutorial database for review. You may want to review the feature in the Tutorial database before configuring your own Commence application.



You can access the Tutorial database by clicking File, Tutorial Database.

Configuring the Social Search Feature:

STEP 1: CREATE A CUSTOM FIELD FOR EACH SOCIAL NETWORK PROFILE

• Select the Customize tab at the top of the screen, then the Database button.

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- Select the Category option.
- select your Contact/Person category or table.
- Click the Edit button.
- Click the Add button to enter the first new custom field.
 - Title the new field type: LinkedIn
 - Select the Internet Address (URL) option.
 - Click OK
- Click the Add button to add your second new customer field.
 - Title the new field: Facebook
 - Select the Internet Address (URL) option.
 - Then Click OK
- Click the Add button to add your third new custom field.
 - Title the new field: Twitter
 - Select the Internet Address (URL) option.
 - Then Click OK

You have now successfully added three new fields into your database. These will be used by the social search feature to capture the URL of the profile page for each social network.

STEP 2: CONFIGURE OTHER APPS PREFERENCE USED FOR MAPPING TO YOUR DATABASE

You will need to confirm that your Commence application mappings to MS Outlook have been configured. This may have already been completed, but if not follow the steps below.

• Select the Edit tab at the top of the screen, then the Preferences button on the right.



CONFIGURE MOBILE LINK & OUTLOOK CONTACTS PREFERENCE

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Event Logs	Category: Contact		•		
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- Next select Other Apps from the left portion of the screen.
- For the Configure Commence As: field, use the drop down arrow to select Mobile Link & Outlook Contacts option.
- In the Category field, use the drop down to select your contact or person category.
- Verify you have mapped the following entries to a field in your category/table:
 - Email 1 map to an email field
 - First Name map to first name field.
 - File As map to your Name or index field
 - Last Name map to your Last Name field.

SOCIAL SEARCH MAPPING

Social search needs to be configured using the Outlook mappings. A user can map the required fields from the "Mobile Link and Outlook Contact" configuration, please see the screenshot below.

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- > Below are the mandatory fields that need to be mapped. (see installation and use document)
 - a. First Name
 - b. Last Name
 - c. Email1
- > The following fields need to be mapped to update details from social search to Commence
 - a. Business City: To update city from social to Commence.
 - b. Business Country: To update country from social to Commence.
 - c. Body: To update the user description/status.
 - d. Email1: To update email.

Note: The above data access points are based on the social site permission and user permissions. Most of the social sites are restricted to email ID, information shown in the social search result will be updated in Commence RM.

- > To auto capture a social profile you must map the following fields with social sites.
 - a. Custom Field1 \rightarrow Twitter
 - b. Custom Field2 \rightarrow Facebook
 - c. Custom Field3 \rightarrow LinkedIn

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elect Mobile Link / Outlook Category: Contact	*	÷
Mobile Link / Outlook Field	Commence Field	-
Title		_
Homepage		
Custom Field 1	twitterLink	
Custom Field 2	FacebookLink	
Custom Field 3	LinkedInLink	
Custom Field 4		
Anniversary		
Birthday		
IM address		~
M address		Y

That's it. You have successfully added the new custom fields and verified that your application will now synchronize with MS Outlook. The Social Search feature is ready to use.

How to search for a contact in LinkedIn, Facebook or Twitter:

- Open a view containing your contacts or person records.
- Click on the Edit tab.
- Select the Social Search button.

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- This will open the social search window on the right side of your screen.
- Highlight any contact record in the view.
- Any listing located for this contact in either Facebook, LinkedIn or Twitter will appear.

All Contacts	*								Search for Jeff, Bezos.
Contact /	Account	Phone #	Ext	Mobile #	Home #	Fax #	E-mail		
Bezos Jeff	Amazon	1900 3000 9009				the same second			Select Social Network
Branson Richard	Concorde Aviation Ltd	412-555-7890	1.1			412-555-7995			Select Social Iverwork
Buffett Warren	Berkshire Hathaway	412-555-7890					berkshire@berkshirehathaway.com		
Carney.Steve	Concorde Aviation Ltd	412-555-7890				412-555-7895			
Carr.Brian	RJ Machine Shop	660-569-6712				660-569-8723			Jeff Bezos
Jouglas Michael	Avisonice Inc	330-555-1905				330-555-1943			Jen Bezos
indlay.Howard	Concorde Aviation Utd	412-555-7890				412-555-7895	HFindlay@concorde.com		
Gates.Bill	Microsoft Corporation	412-555-7890				10000000000	bill gates@gatestoundation.com		
ennings.Kevin	TaiWing Industries	505-190-2367				505-190-2690			
ogan Andrew	SubSonic Industries	912-555-8193				912-555-8194			
adison.Bruce	First Class Inc	416-781-1209				416-781-1208			
Aalick.Charles	Wilbur Drville Industries	513-555-0184				513-555-0185			
Aark Kane	Preformed Wing Company	501-555-0987				501-555-0985			
Achore.Hany	NorthCoast Rudder Company	215-555-0912				216-555-0913	hmelrose@northcoastrudderco.com		
lusk Flon	Vertical Stab Company	216-995-1235				216-885-1365		~	

You may now view and capture information about the contact.

MESSAGES

Search text will be set based on the selected Contact record
If user not selected mapped category and clicked on the social search network.

Search for Jeff, Bezos,	Social search will ch the mapping. Below sites.		•
	Custom Fie	ld1 \rightarrow Twitter	
Select Social Network	Custom Fie	ld2 \rightarrow Facebook	
	Custom Fie	ld3 → LinkedIn	
Jeff Bezos Amazon, Blue Origin, Washin Joined on: July 2008	Configure Commence as: Mobile Link and Outlook C	autoria	
	,		
Jeff Bezos	Select Mobile Link / Outloo		
	Category: Contac	t	•
	Mobile Link / Outlook Fie	eld Commence Field	^
Jeff Bezos	Title Homepage Custom Field 1 Custom Field 2 Custom Field 3 Custom Field 4 Anniversary Birthday IM address	twitterLink FacebookLink LinkedInLink	~
		Edit	
	Searching in progre	255.	
Search for Brian , Carr,			
Select Social Network			
Searching			