

Using the Commerce RM Social Search Feature

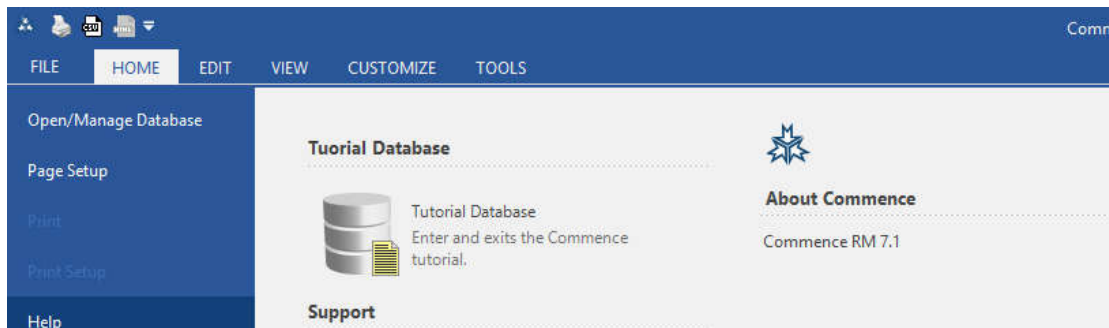
The Social Search feature will require configuration by your database administrator.

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 Commerce 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 Commerce Tutorial database for review. You may want to review the feature in the Tutorial database before configuring your own Commerce application.

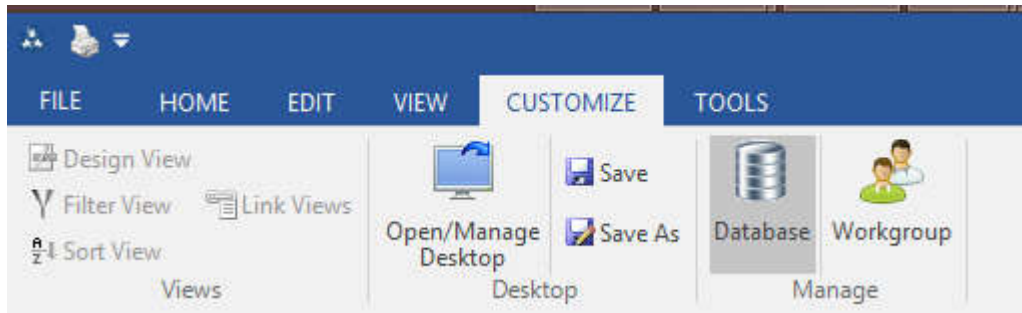
You can access the Tutorial database by clicking File, Tutorial Database.



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.



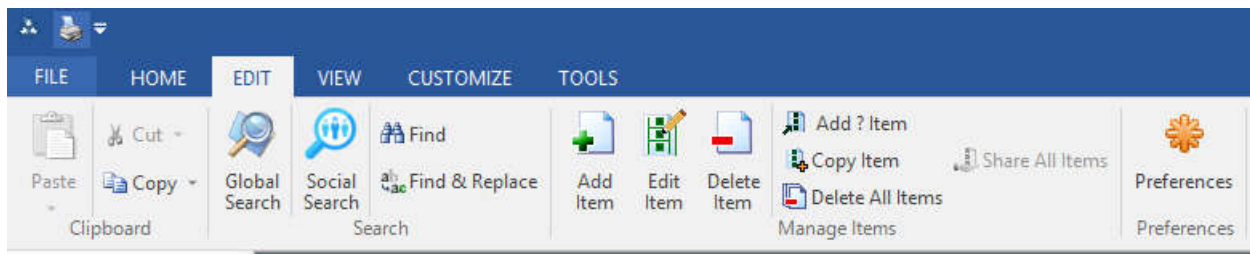
- Select the Category option.
- select your Contact/Person category or table.
- Click the Edit button.
- Click the Add button to enter the first new custom field.
 - Title the new field type: **LinkedIn**
 - Select the Internet Address (URL) option.
 - Click OK
- Click the Add button to add your second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

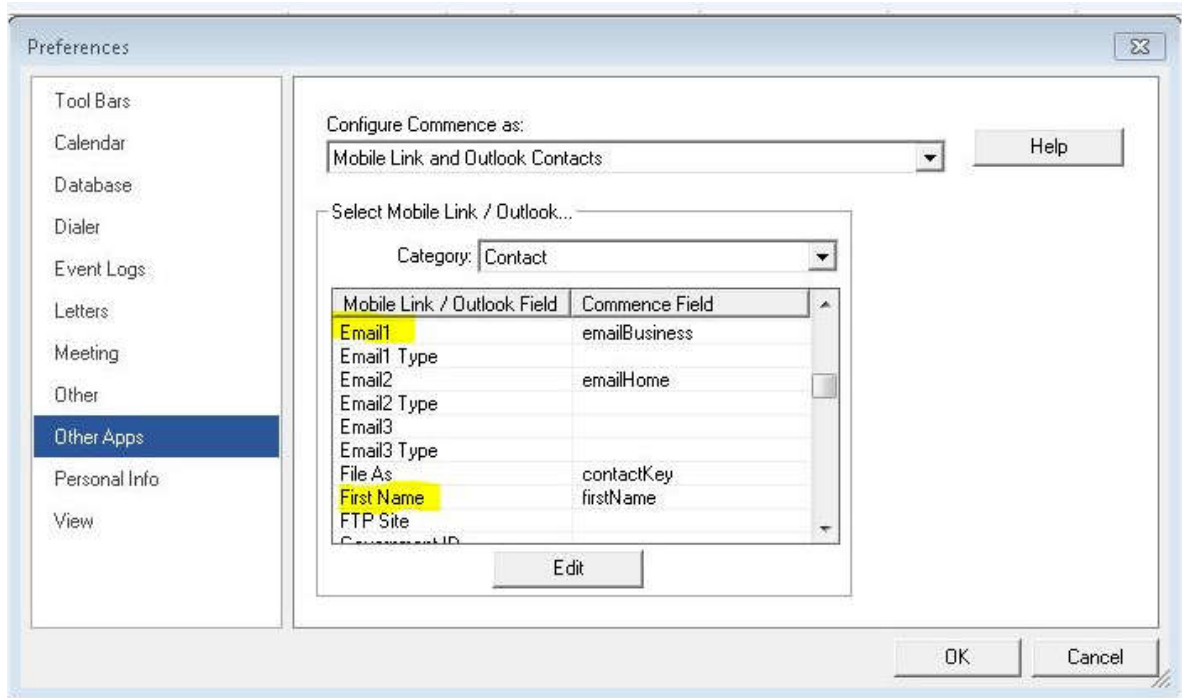
STEP 2: CONFIGURE OTHER APPS PREFERENCE USED FOR MAPPING TO YOUR DATABASE

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.



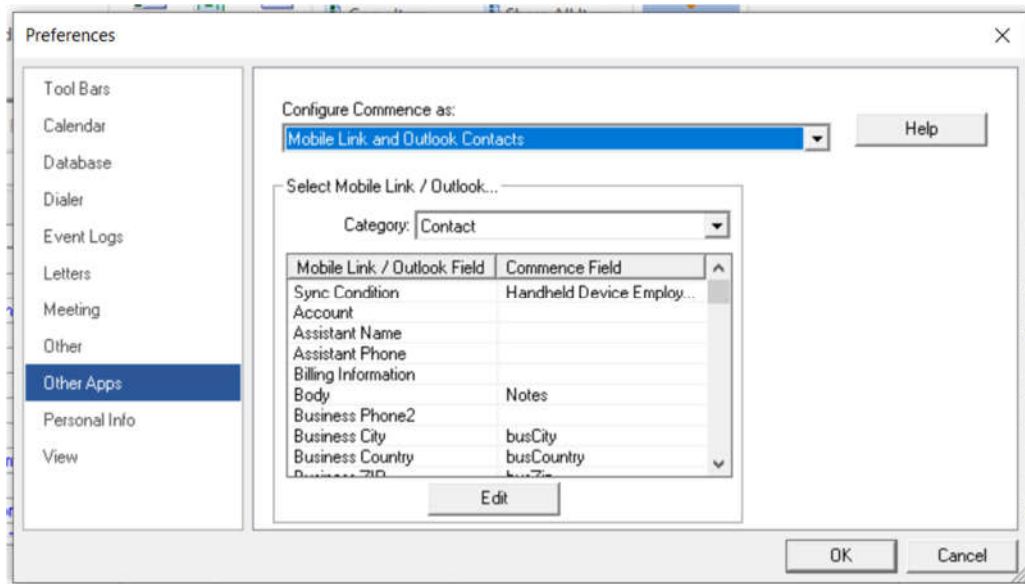
CONFIGURE MOBILE LINK & OUTLOOK CONTACTS PREFERENCE



- 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.

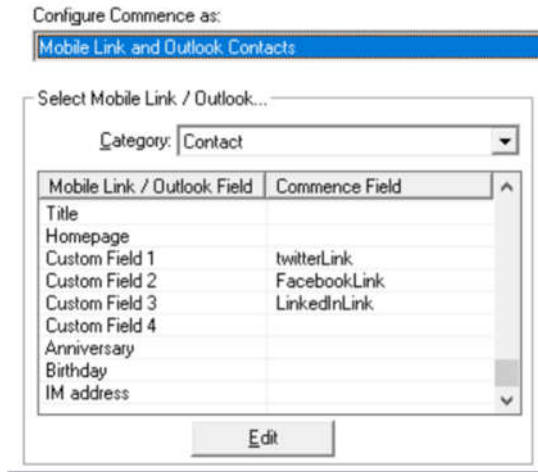
SOCIAL SEARCH MAPPING

- 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.



- 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.

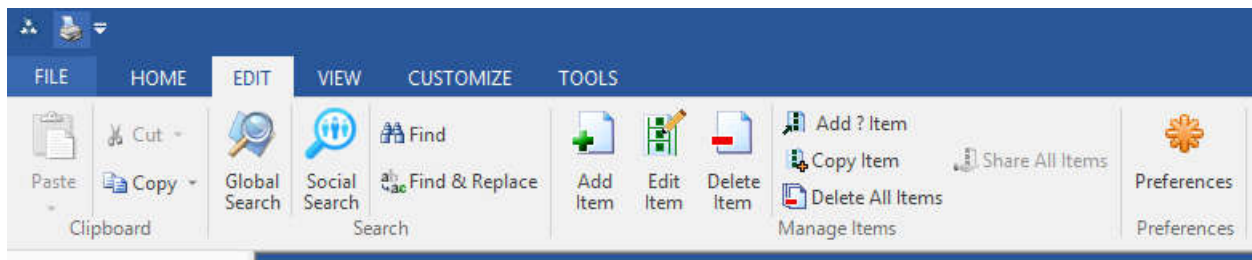
Note: The above data access points are based on the social site permission and user permissions. Most of the social sites are restricted to email ID, information shown in the social search result will be updated in Commence RM.
- To auto capture a social profile you must map the following fields with social sites.
 - a. Custom Field1 → Twitter
 - b. Custom Field2 → Facebook
 - c. Custom Field3 → LinkedIn



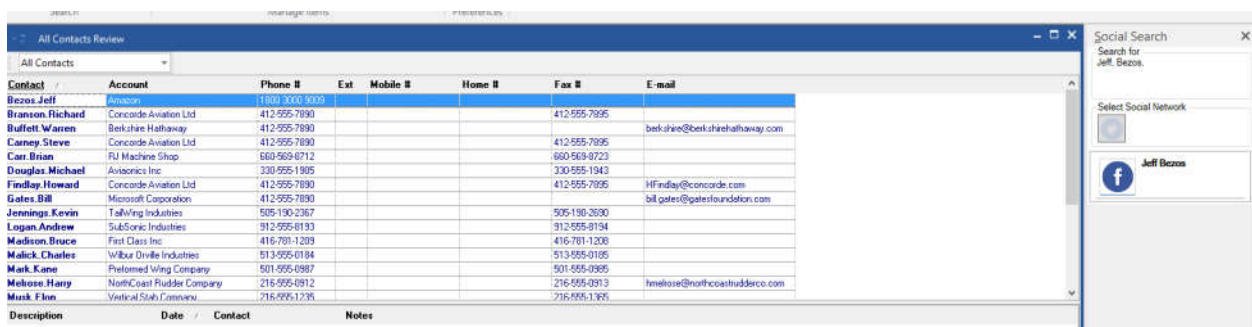
That's it. You have successfully added the new custom fields and verified that your application will now synchronize with MS Outlook. The Social Search feature is ready to use.

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.

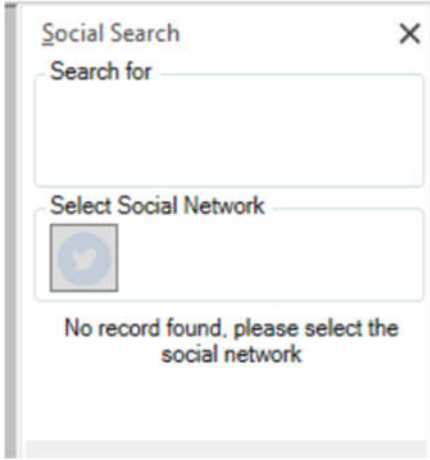
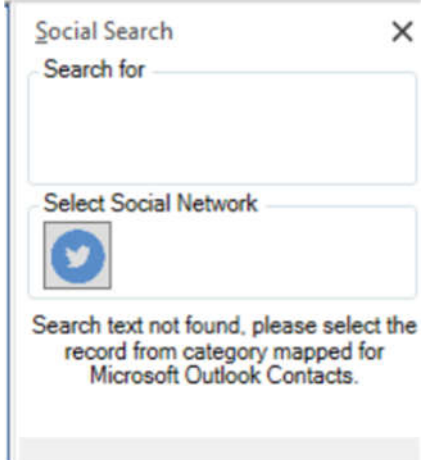


- This will open the social search window on the right side of your screen.
- Highlight any contact record in the view.
- Any listing located for this contact in either Facebook, LinkedIn or Twitter will appear.



You may now view and capture information about the contact.

MESSAGES

Message	Details
 <p>The screenshot shows a dialog box titled "Social Search" with a close button (X) in the top right corner. It contains a "Search for" text input field, a "Select Social Network" section with a Twitter icon, and a message at the bottom: "No record found, please select the social network".</p>	Search text will be set based on the selected Contact record
 <p>The screenshot shows a dialog box titled "Social Search" with a close button (X) in the top right corner. It contains a "Search for" text input field, a "Select Social Network" section with a Twitter icon, and a message at the bottom: "Search text not found, please select the record from category mapped for Microsoft Outlook Contacts."</p>	If user not selected mapped category and clicked on the social search network.

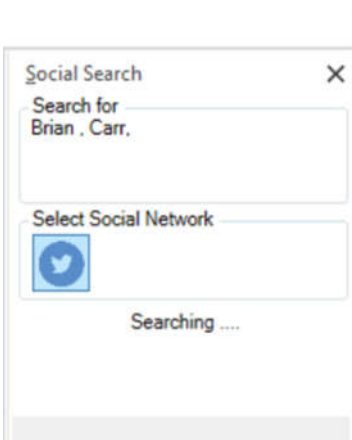
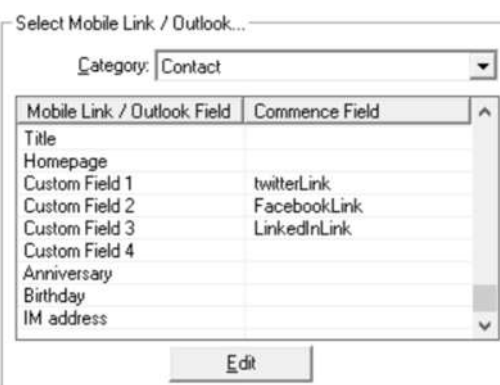


Social search will check the social links/profile ID based on the mapping. Below is the mapping required to the social sites.

- Custom Field1 → Twitter
- Custom Field2 → Facebook
- Custom Field3 → LinkedIn

Configure Comence as:

Mobile Link and Outlook Contacts



Searching in progress.