



# Lead Generation using Facebook Lead Ads and LeadSquared

## What is Facebook Lead Ads Form?

Facebook lead ads makes the lead generation process easy. People can simply tap your ad and a form pops up – it's already pre-populated with their Facebook contact information and ready to be sent directly to you. With just a few taps, they can get the information they want, and you generate a qualified lead for your business. Optimise your lead ads for quick follow-ups or higher-quality leads with custom features.

## Why use Facebook Lead Ads Form?

**Identify potential customers for your business :** Lead ads allow you to find people who may be interested in your products or services and collect information from them.

**Collect subscriber information :** Using an Instant Form, you can collect contact information such as name, email address, phone number and more.

**Easy Integration with CRM and Email Software :** Can be integrated with a CRM or Email software to promptly contact new leads as they sign up.

Facebook Lead Ads Form can be a great solution for businesses that track online lead or form submissions. Industries that have seen success with Facebook Lead Ads Form include:



EduTech



Automotive



Financial Services



Business-to-business



2.5x

increase in sales conversions



58%

of total leads comes from Facebook



9x

increase in Click Through Rate



26%

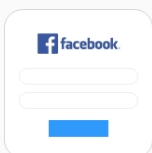
decrease in cost per lead

Source : Facebook, Hubspot, DriftRock, Zapier & InstaPage

## How does Facebook Lead Ads Form work?

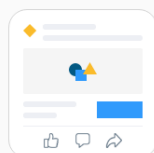
1

User logs in to Facebook and they start scrolling through feed



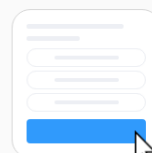
2

Facebook Ads with some action will be shown to the user



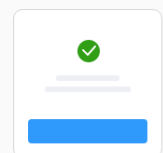
3

User clicks on action, needs to fill up the form



4

Once form is submitted successfully, User will be added as lead



## LeadSquared's Facebook Lead Ads Connector

With Facebook Lead Ads in LeadSquared, tracking your customers and prospects with highly relevant ads and reporting on the true ROI becomes easier. Track all your leads from Facebook using a single tool, without having to download a CSV every time. This integration helps you to reach your target audience, buyer personas, and current customers on the platform. Also, analyse and measure effectiveness of each campaign with detailed reports and analytics.

### Seamlessly collect prospects directly from your Facebook ads

The LeadSquared Facebook Lead Ads connector sets up a seamless transfer of your lead data from Facebook Ads and Instagram Ads accounts to your LeadSquared account. It allows you to track all your leads from Facebook in real-time, by syncing your Facebook LeadGen form with LeadSquared. This removes the need to constantly download a CSV file from Facebook, and upload it to LeadSquared.

### What can the integration do?

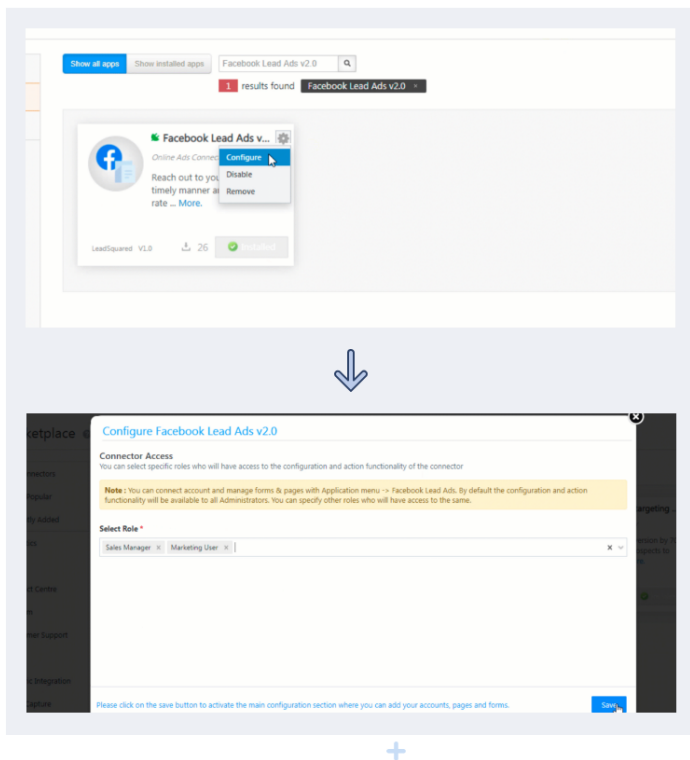
- ☐ **Receive Leads in Real-Time:** Sync all your leads and specific Facebook Lead Forms with LeadSquared CRM in real-time.
- ☐ **Field Mapping:** Gather more information from your leads with advanced field mapping for both marketing and default fields.
- ☐ **Manage your pages and forms:** Seamlessly connect your pages and forms from Facebook and capture all leads from Facebook into LeadSquared.
- ☐ **View Logs:** Detailed logs for each LeadGen ID and also get Lead detail response & Lead Capture logs to avoid Lead Leakage.



### Setting up Facebook Lead Ads with LeadSquared

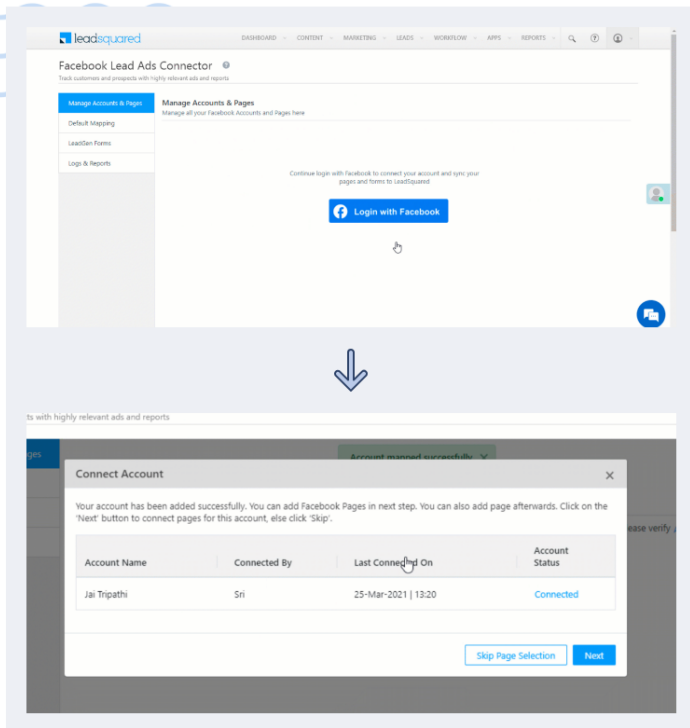
In the next page, you can find simplified instructions on how to use the LeadSquared's Facebook Lead Ads Connector. For a detailed walkthrough please visit:

<https://help.leadSquared.com/facebook-lead-ads-connector/>



## Step 1 : Install the connector

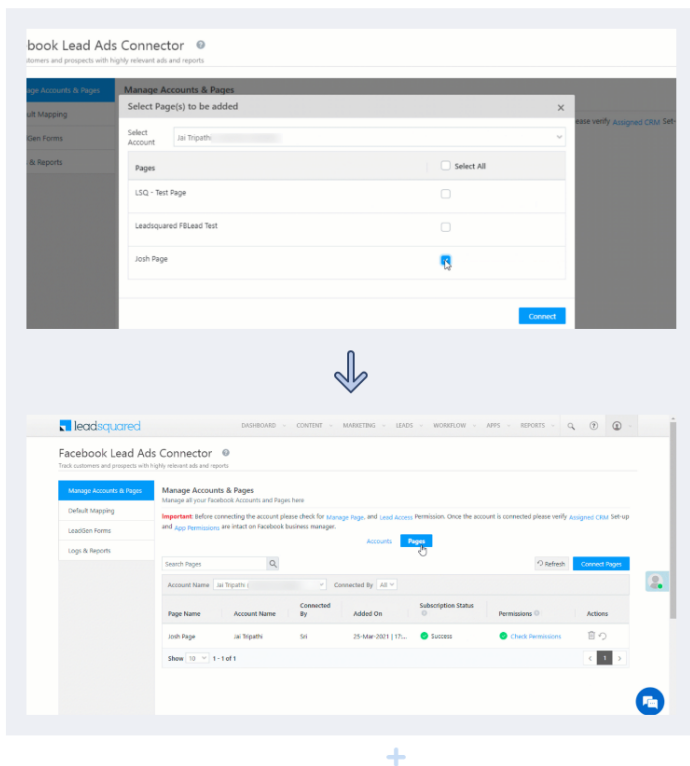
- ❑ To install the Facebook Lead Ads connector on your account from the main menu, navigate to **Apps>Apps Marketplace**.
- ❑ Search for **Facebook Lead Ads v2.0**, and click **Install**. Alternatively, you can find the connector on the left panel, under **Online Ads**.
- ❑ Once the connector is installed, hover your cursor over the settings icon, and click **Configure**.
- ❑ On the **Configure Facebook Lead Ads v2.0** pop-up, from the **Select Role** dropdown, choose the user roles for which you want to give connector configuration and actions permission. If you choose to not give permissions to other user roles, then skip this step, and directly click **Save**.
- ❑ Once you're done, click **Save**. The connector is successfully installed.



## Step 2: Connect Ad Accounts

Once the connector is installed, connect your Facebook Ads account to LeadSquared.

- ❑ Navigate to **Apps>Facebook Lead Ads Connector**.
- ❑ On the **Manage Accounts & Pages** tab, click **Connect Accounts**, and then click **Login with Facebook**.
- ❑ On the pop-up, log in to your Facebook Business account.
- ❑ On the pop-up, select all the Facebook ad pages linked to your Facebook Business account, and click **Next**.
- ❑ Ensure all the permissions are granted, and then click **Done**.
- ❑ Then, on the **You've now linked LSQ Lead Ads Connector to Facebook** pop-up, click **OK**.
- ❑ On the **Connect Account** pop-up, you can see that the Facebook Business Account is now successfully linked to LeadSquared.



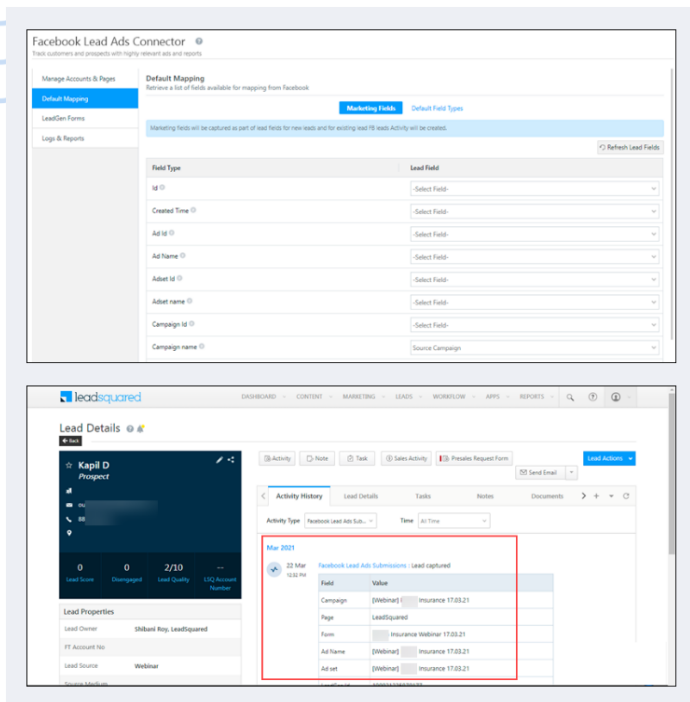
## Step 3: Connect Pages

Once you've connected the Facebook Business account(s), from the list of Ad Pages, choose the Pages you want to sync with LSQ.

- On the **Connect Account** pop-up, click **Next**.
- On the **Select Page(s) to be added** pop-up, against the Ad Page you want to link, check the checkbox.
- Then, click **Connect**.
- To view the page(s) that you have added, click **Pages**. Here, you can view all the Ad Pages you have connected to LeadSquared.
- Once you have connected the Ad Pages to LeadSquared, click **Next**.

To connect pages across multiple Facebook Business accounts-

- On the **Pages** screen, click the **Connect Pages** button.
- On the **Select Page(s) to be added** pop-up, select the Facebook Business Account from which you want to connect Ad Pages.
- The other steps remain the same as listed above.



## Step 4: Default Field Mapping

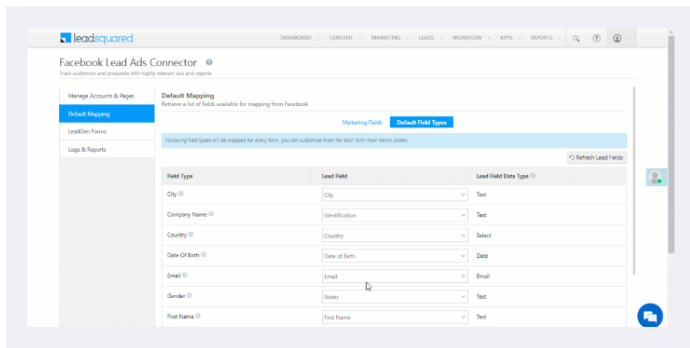
After you've connected an Ad Page, you must then map the Facebook LeadGen form fields present on that page, to the corresponding LeadSquared lead fields.

### 4.1 Marketing Fields

Every Facebook form has custom marketing data (like Form Id, Ad Id, Campaign Id etc.), and this data is present within **Marketing Fields**. All the marketing details are captured as an activity in LeadSquared, but if you want to store this data on the **Lead Details** page, then you can map the Facebook form fields to any LeadSquared lead field or custom field. This data can be used to compare two or more forms, see how efficient each form is, and so on.

**Note:** By default, **Campaign Name** is mapped to **Source Campaign** lead field. To map the other fields, please refer to the steps below.

By default, when a Facebook LeadGen form submission takes place (and when a new lead is created or updated in LeadSquared), the marketing fields are captured as an activity and posted on the **Lead Details** page. The activity is called **Facebook Lead Ads Submissions**, and it contains the details of all the marketing fields (such as Form ID, Ad Set ID, Campaign ID, etc.).



## Step 4.2 : Default Field Types

Facebook has a set of default lead capture fields, which are common across all their forms. You must map these lead capture fields to the corresponding LeadSquared lead fields. This mapping will reflect across all the Facebook LeadGen forms you connect with LSQ.

**Note:** Only default Facebook fields show up here. If you have created custom fields, it will show up in the next step, under **Activate Form**.

To map fields -

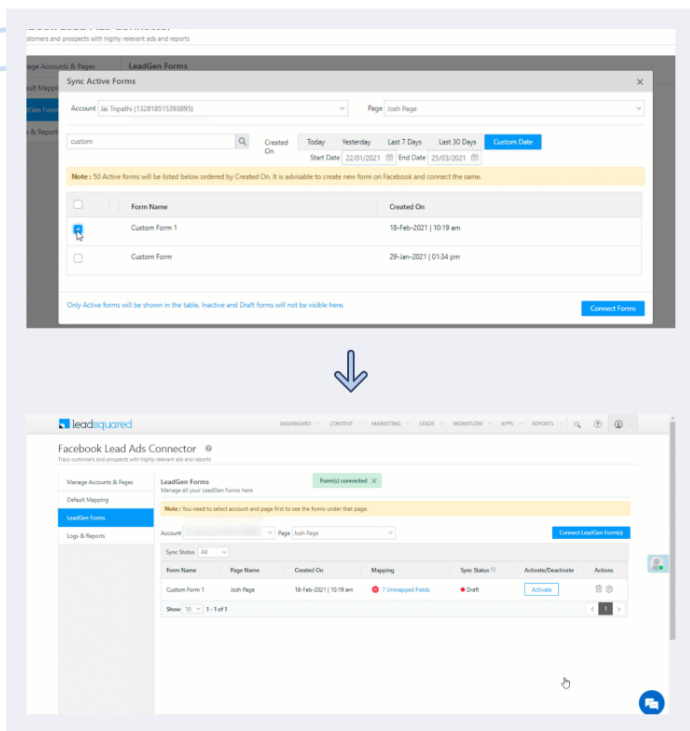
- ☐ Map each **Field Type** (Facebook LeadGen Form field) to the relevant LeadSquared lead field, by selecting the field from the **Lead Field** dropdown options. If you choose to not map a particular field, then choose **None** from the dropdown options.
- ☐ Some of the **Field Type** fields are automatically mapped to a LSQ lead field. If the mapping is accurate, then you can let it be as such.
- ☐ The data type for the LeadSquared **Lead Field** that you've selected is listed under **Lead Field Data Type**. This will ensure that you're mapping the Facebook form field to the correct data type.
- ☐ Once you've mapped all the fields, click **Save and Next**.

## Step 5 : Connect LeadGen Form

To send lead data from Facebook to LeadSquared, you must link an active Facebook LeadGen form to LeadSquared. The field mapping you completed in the previous step will reflect here by default.

**Note:** An active form is a form that's less than 90 days old. If the form is older than that, please create a duplicate form, and link that to LeadSquared.

- ☐ On the **LeadGen Forms** tab, click **Connect LeadGen Form(s)**.
- ☐ On the **Sync Active Forms** pop-up, select the **Account** and **Page** that contains the form you're looking to link.
- ☐ Against **Created On**, filter by the date range during which the form was created.
- ☐ Then, enter the form name in the **Search Forms** search box.
- ☐ Against the form you're looking to connect, check the checkbox, and click **Connect Forms**.
- ☐ Your form is now synced to LeadSquared.





| Form Field(s)                             | Form Field Type | Default Value       | Lead Field(s) | Lead Field Type | Enable                              |
|---|-----------------|---------------------|---------------|-----------------|-------------------------------------|
| Is Multiple Choice question asked?        | CUSTOM          | Yes, No             | Text on       | Text            | <input checked="" type="checkbox"/> |
| Would you like a t-shirt or a sweatshirt? | CUSTOM          | T-shirt, sweatshirt | Text          | Text            | <input checked="" type="checkbox"/> |
| What color would you prefer?              | inline_select   | inline_select       | Select Field  | Text            | <input checked="" type="checkbox"/> |
| What size would you like?                 | inline_select   | inline_select       | Select Field  | Text            | <input checked="" type="checkbox"/> |
| Would you like to book an appointment?    | DATE_TIME       | Select Field        | Select Field  | Text            | <input checked="" type="checkbox"/> |
| Short answer question example             | CUSTOM          | Select Field        | Select Field  | Text            | <input checked="" type="checkbox"/> |
| Email                                     | EMAIL           | Email               | Email         | Email           | <input checked="" type="checkbox"/> |
| First name                                | FIRST_NAME      | Name                | Name          | Text            | <input checked="" type="checkbox"/> |

## Step 5.1 : Activate Form – Questions

You must map custom LeadGen form fields (if they are present in the form) to the corresponding LeadSquared lead fields.

- ☐ On the LeadGen Forms screen, click the **Activate** button. Alternatively, if there are unmapped fields that need to be mapped, then click the hyperlink under **Mapping**.
- ☐ On the **Activate Form** pop-up, on the **Questions** tab, if there are unmapped custom fields, map it to the corresponding LSQ lead field from the **Lead Field(s)** dropdown. To disable a Facebook form field, and not capture that data in the lead creation process, you can leave the lead fields blank, or you can disable the slider.
- ☐ Once you're done, click **Save Changes & Next**.

| Form Field(s)   | Lead Field(s)   | Enable                              |
|-----------------|-----------------|-------------------------------------|
| Id              | Select Field    | <input checked="" type="checkbox"/> |
| Created Time    | Select Field    | <input checked="" type="checkbox"/> |
| Ad id           | Select Field    | <input checked="" type="checkbox"/> |
| Ad Name         | Select Field    | <input checked="" type="checkbox"/> |
| Advertiser id   | Select Field    | <input checked="" type="checkbox"/> |
| Advertiser name | Select Field    | <input checked="" type="checkbox"/> |
| Campaign id     | Select Field    | <input checked="" type="checkbox"/> |
| Campaign name   | Source Campaign | <input checked="" type="checkbox"/> |

## Step 5.2 : Activate Form – Marketing Fields

On this screen, you can choose to store the marketing data (Form Id, Campaign Id, etc.) present in the form's Marketing Fields in your LSQ lead fields.

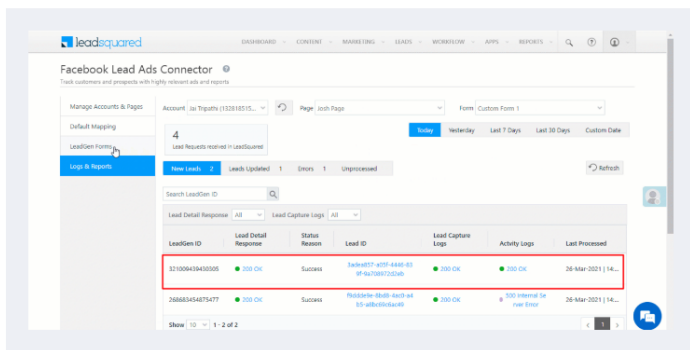
- ☐ Against the **Form Field(s)**, from the **Lead Fields** dropdown, choose the lead field in which you want to store the marketing data. If you do not wish to store the data in your lead fields, you can leave the lead fields blank, or you can disable the slider.
- ☐ Once you're done, click **Save Changes & Next**.

| Form Field(s)    | Default Value       | Lead Field(s) | Lead Field Type | Enable                              |
|------------------|---------------------|---------------|-----------------|-------------------------------------|
| Custom Parameter | Custom Params Value | opt in        | Select          | <input checked="" type="checkbox"/> |

## Step 5.3 : Activate Form – Tracking Parameters

If you've added tracking parameters to your Facebook form, those parameters will show up on this screen. You can choose to store the default tracking parameter value in a lead field. This will help you identify which leads have been created through the tracking parameter (source) that you have listed.

- ☐ Against the **Default Value**, from the **Lead Fields** dropdown, choose the lead field in which you want to store the tracking parameter data. If you do not wish to store the data in your lead fields, you can leave the lead fields blank, or you can disable the slider.
- ☐ Once you're done, click **Save Changes & Next**.

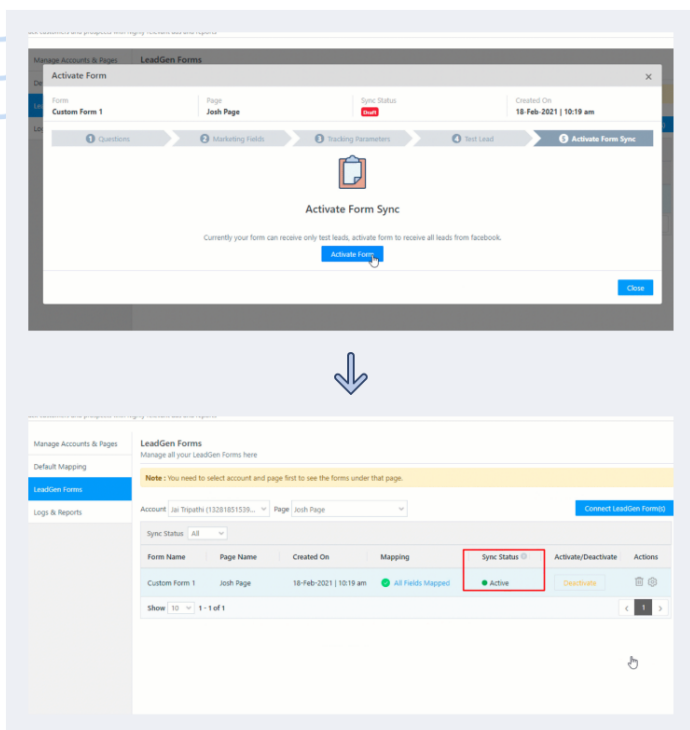


## Step 5.4 : Activate Form – Test Lead

To create a test lead through Facebook, navigate to Lead Ads Testing Tool. Once you've created a test lead, to know if the test lead data is successfully pushed to LeadSquared –

- On the Facebook Lead Ads Connector page, navigate to the **Logs & Reports** tab.
- Select the **Account**, **Page** and **Form** in which you created the test lead.
- Change the date range to **Today**. In a couple of minutes, you'll then be able to view the test lead that was created.
- If the test lead you created has been successfully pushed to LeadSquared, you can view the details here.
- Then, go back to the **Activate Form** pop-up, and on the **Test Lead** tab, click **Save Changes & Next**.

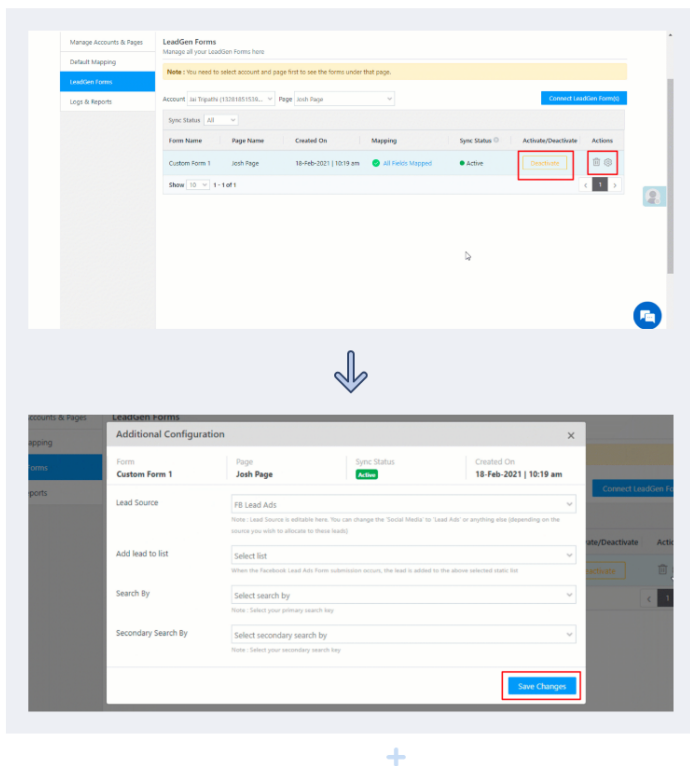
**Note:** Once the test lead is visible on the **Logs & Reports** tab, click the **Lead ID** link, or navigate to the **Manage Leads** page to confirm that the test lead and all the lead data has been successfully captured by LeadSquared.



## Step 5.5 : Activate Form – Activate Form Sync

Once you have created a test lead, and confirmed that the test lead is being pushed to LeadSquared, you must activate the form. To do this, click **Activate Form**. Once the form is activated, the **Sync Status** will change to **Active**.

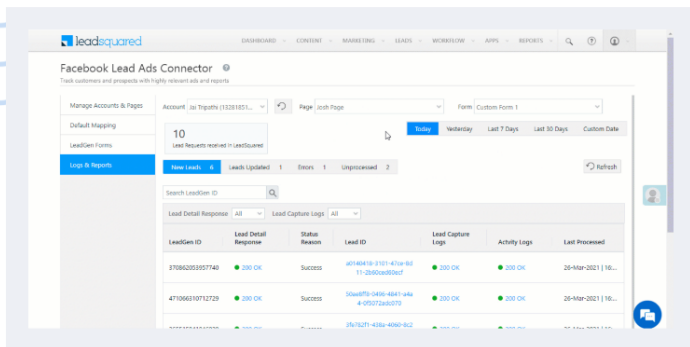
Your form can now actively capture leads from Facebook, and send lead data to LeadSquared.



## Step 5.6 : Additional Configuration

You can perform the following additional actions on the LeadGen tab.

- ❑ To deactivate a LeadGen form but retain the form configuration, under **Actions**, click **Deactivate**.
- ❑ To delete a LeadGen form, under **Actions**, click the Delete icon.
- ❑ To configure additional settings, under **Actions**, click Settings icon. On the **Additional Configuration** pop-up, you can configure the following settings –
  - Lead Source** – Select the source you want to enter in the Lead Source lead field for all the leads generated through this form.
  - Add lead to list** – If you want to add all the leads generated through this form to a lead list, then select the lead list from the dropdown. To know more, see [How to Create a Lead List](#).
  - Search By** – If required, set a primary search key (e.g., Email Address, Mobile Number, etc.) for all the leads generated through this form.
  - Secondary Search By** – If required, set a secondary search key for all the leads generated through this form. This is a fall-back option, for a situation where the primary search key value is not provided by the lead.



## Step 6 : Logs & Reports

Here, you can view the lead request logs received by LeadSquared for new leads, updated leads, lead capture error, and unprocessed leads, for each LeadGen form. Select the **Account**, **Page** and **Form** for which you want to view the logs. On these screens, you can filter logs by date range, **Lead Detail Response** and **Lead Capture Logs**. You can also search for a lead using the **LeadGen ID**.

- New Leads** – All the new leads that have been pushed to LeadSquared.
- Leads Updated** – Existing leads' whose lead details have been updated through this Facebook form.
- Errors** – Leads that haven't been pushed to LeadSquared, because of an error during lead capture. The reason for this error is listed under **Status Reason**. Once the error is rectified, to capture the lead details, under **Actions**, click the Refresh icon.
- Unprocessed** – Certain leads remain unprocessed due to the Facebook Business account being inactive, or due to permissions-related issues. Once you've rectified these errors, click **Process Leads Now**. This will process all the leads in bulk. You can perform this action only once every 24-hours.

For a detailed documentation about the product, please visit : <https://help.leadSquared.com/facebook-lead-ads-connector/>

Need help? Get in touch with LeadSquared's support. Mail us at [support@leadSquared.com](mailto:support@leadSquared.com)