

# Twitter Integration

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Once integrated, a new Twitter feed can be sent from within an Agiloft knowledgebase in real time, enabling you to send and receive tweets directly from within your records. To set up Twitter integration, follow the steps below.

# Obtain Twitter Account Details

Follow these steps to configure your Twitter account to connect to Agiloft:

1. In your browser, go to <http://apps.twitter.com>, and sign in to your Twitter account or create one if you do not already have one.
2. Click Create New App.
3. Fill out the required fields and click Create your Twitter application.
4. Click the Permissions tab and ensure that the Read and Write option is selected.
5. Select the Keys and Access Tokens tab and click Create my access token.



6. Save/write down the Consumer key, Consumer secret, Access Token, and Access token secret.

### Application Settings

Your application's Consumer Key and Secret are used to *authenticate* requests to the Twitter Platform.

Access level	Read and write (modify app permissions)
Consumer Key (API Key)	[REDACTED] (manage keys and access tokens)
Callback URL	None
Callback URL Locked	No
Sign in with Twitter	Yes
App-only authentication	<a href="https://api.twitter.com/oauth2/token">https://api.twitter.com/oauth2/token</a>
Request token URL	<a href="https://api.twitter.com/oauth/request_token">https://api.twitter.com/oauth/request_token</a>
Authorize URL	<a href="https://api.twitter.com/oauth/authorize">https://api.twitter.com/oauth/authorize</a>
Access token URL	<a href="https://api.twitter.com/oauth/access_token">https://api.twitter.com/oauth/access_token</a>

### Your Access Token

This access token can be used to make API requests on your own account's behalf. Do not share your access token secret with anyone.

Access Token	[REDACTED]
Access Token Secret	[REDACTED]
Access Level	Read and write
Owner	<a href="#">jasonmarkgray</a>
Owner ID	[REDACTED]

7. Once Twitter has been configured, login to your knowledgebase to continue setup of Twitter integration.

# Configure the Knowledgebase

Tweets and their responses are stored in their own fields - generally a text field - which are be mapped in the Twitter Integration wizard. In addition, you must designate a Yes/No choice field to determine whether the conversation should continue to be published in the record. This is the most basic level of integration which is required for Twitter to work.

To review the Twitter records in the All Communications table, you should also set up the permissions and All Communications table view to make it possible to view the Tweets which are stored in the table.

Follow these steps to configure Twitter integration with the knowledgebase:

1. Log into your knowledgebase and navigate to **Setup > Integration > Twitter > Configure**.
2. Select New.
3. Enter a description, then fill in the Consumer key, Consumer secret, Access Token, and Access token secret from the Twitter configuration. Ignore the Screen Name field.
4. Click the button Test login and fetch screen name. If everything has been entered correctly, the Screen Name is automatically filled in for you.

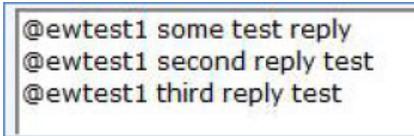
The screenshot shows a web form titled "Setup → Integration → Twitter". At the top, there are tabs for "Twitter Account", "Table", and "Options", with "Twitter Account" selected. Below the tabs are "Next" and "Cancel" buttons. The form is divided into several sections:

- Twitter Account Description:** A text input field with a label "\*Description".
- Twitter Account Screen Name:** A text input field with a label "\*Screen Name".
- Twitter Account Credentials:** A section with a detailed instruction: "Enter Twitter Consumer key, Consumer secret, Access Token and Access Token Secret which is necessary to login Twitter Account you want. To get these infos go to <http://dev.twitter.com>, login with your account, click 'Register a new app', enter required fields, setting Application Type to Client and Default Access type to Read & Write, click 'Register Application'. Then store your Consumer key and Consumer secret, click 'My Access Token', store your Access Token (oauth\_token) and Access Token Secret (oauth\_token\_secret)". This section contains four text input fields: "\*Consumer key", "\*Consumer secret", "\*Access Token", and "\*Access Token Secret". Below these fields is a button labeled "Test login and fetch Screen Name".
- Account is enabled:** A section with the text "Select Yes if you want to enable the account. Select No otherwise." and two radio buttons: "Yes" (selected) and "No".

At the bottom of the form, there are "Next" and "Cancel" buttons.

5. Click Next.

6. Select the table you want to integrate with Twitter and click Next.
  - a. Select a field to publish messages from the Store tweet in list.
  - b. Select a field to receive responses from the Store Tweet text in list.
  - c. Select whether the responses should prepend, append, or to overwrite the text in the response field. See the images below to see the difference in how replies appear if a text field is chosen or an append-only text field is chosen:
    - i. Regular text field response appearance:



```

@ewtest1 some test reply
@ewtest1 second reply test
@ewtest1 third reply test
  
```

- ii. Append-only text field response appearance:



```

[ewtest1 Jan 16 2012 15:07]
@ewtest1 test append reply 1
[ewtest1 Jan 16 2012 15:07]
@ewtest1 test append reply 2
[ewtest1 Jan 16 2012 15:07]
@ewtest1 test append reply 3
  
```

- d. The list of Yes/No choice fields allows you to select a field to determine whether to tweet a particular new record on a case by case basis. The tweet **is** sent only if it has a Yes or blank value.
      - e. The Polling Frequency option allows you to set how often you wish the Twitter account to be polled for responses to your tweets.

Once the table has been set up with the fields to send and receive tweets, and to choose whether to continue publishing tweets in the conversation, any tweets sent from a record in the table are sent from the Twitter account, and responses appear in the record as long as the choice to continue the conversation is set to Yes. It is important to note that if a record is edited and the text in the designated field changes, the tweet, as posted on Twitter, remains unchanged, and no new tweets are added to the Twitter feed. In other words, any edits made to the source field after the creation of the record are not reflected on Twitter in any way.

# Notes

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- If the choice field option is turned on in the wizard, it is recommended that you set a default value for the field or make it required, because if the field has not been set by the user at record creation to either Yes or No, the knowledgebase interprets the value to be Yes and tweet the text in the source field.
- If a new tweet is created outside of the knowledgebase, for example from within a Twitter client, the knowledgebase doesn't create a new record for the tweet, nor does it store it in any existing records.