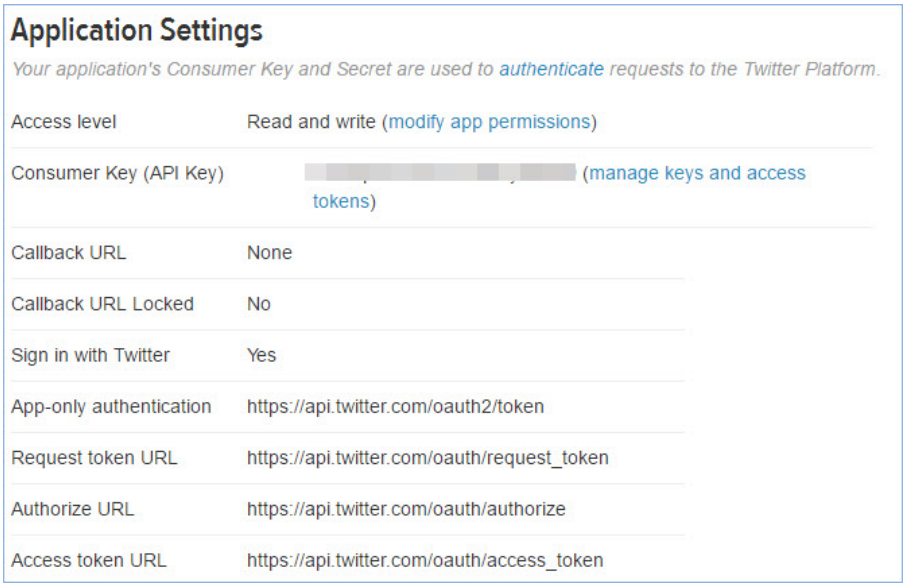
Twitter Integration

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. Copy the Consumer key, Consumer secret, Access Token, and Access token secret, and paste them into a word processor like Word or Notepad.



7. Once Twitter has been configured, log in to your knowledgebase to continue.

Configure the Knowledgebase

Tweets and their responses are stored in their own fields, generally a text field. which are then 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 required for Twitter to work.

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

Follow these steps to configure the Twitter integration with your KB:

1. Click the **Setup** gear in the top-right corner and go to **Integration > Twitter > Configure.**
2. Click New.
3. Enter a description, then paste 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.
5. Click Next.
6. Select the table you want to integrate with Twitter and click Next.
7. Select a field to publish messages from the Store tweet in list.
8. Select a field to receive responses from the Store Tweet text in list.
9. Select whether the responses should prepend, append, or to overwrite the text in the response field. Append includes a new date and time stamp for each reply, while overwriting takes place in the same text box.
10. 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.

    > ⚠ If you use this option, make sure the Choice field you select is a required field. If the field isn't set to Yes or No when a record is created, the null value is interpreted as a Yes, and the system automatically sends the tweet.

11. 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.

> ⚠ 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.