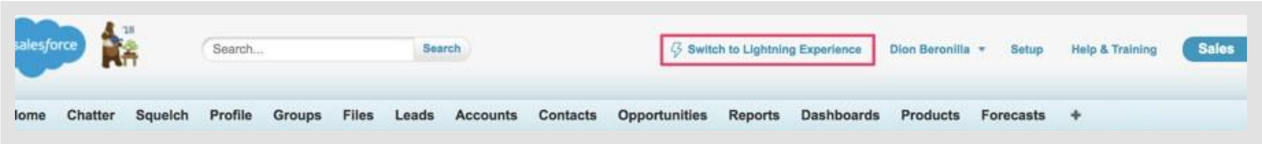
Information & Configuration

lendingtree salesforce

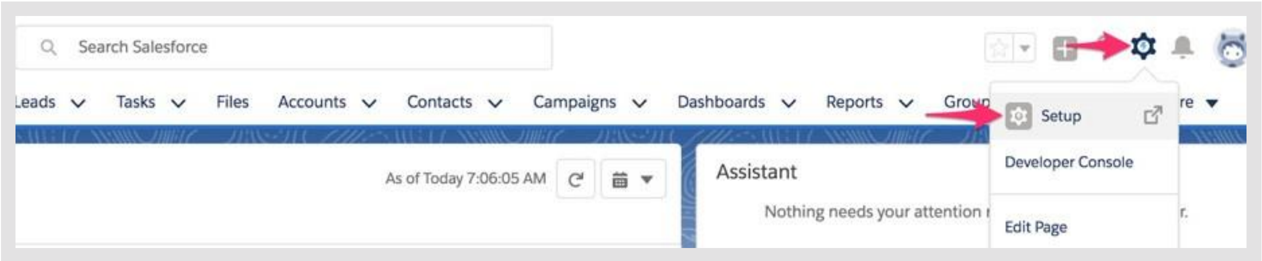
Contents

Introduction

This document serves as a configuration guide for the LendingTree Salesforce app. The first section covers the installation of the LendingTree package. The following sections will walk you through applying permission sets and completing the Setup Assistant. This guide is meant to walk you through configuring your org in a Lightning Experience environment. If using the Salesforce Classic interface, you can switch to Lightning by clicking Switch to Lightning Experience at the top of the page.



Throughout this guide, you will be instructed to navigate through Setup. To do so, you will need to click on the gear to the upper right and select Setup. Once in Setup, you may use the Quick Find box to find and navigate to the appropriate section.



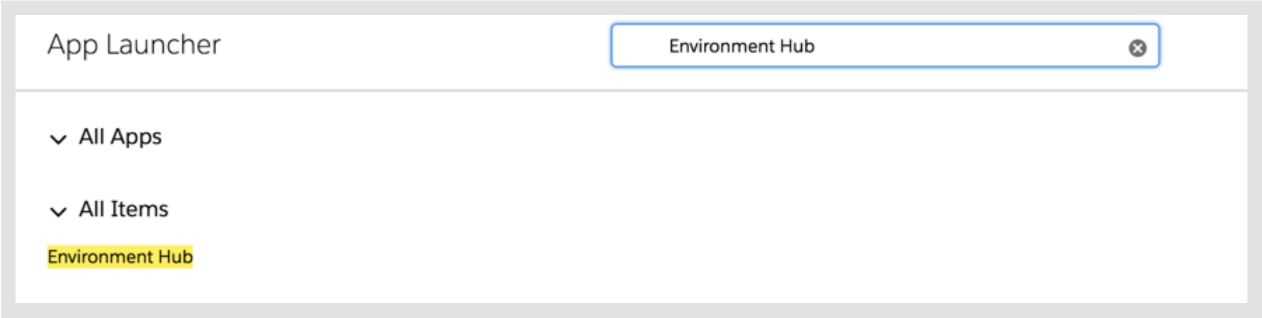
Preinstallation

Creating a test environment from your Partner Business Org

If you need to test the app prior to going to production, and you do not have an org to test the installation, you can create a QA org using your Partner Business Org. If you do not have the PBO credentials, please contact your administrator. With your PBO credentials, login to Salesforce using https://login.salesforce.com/

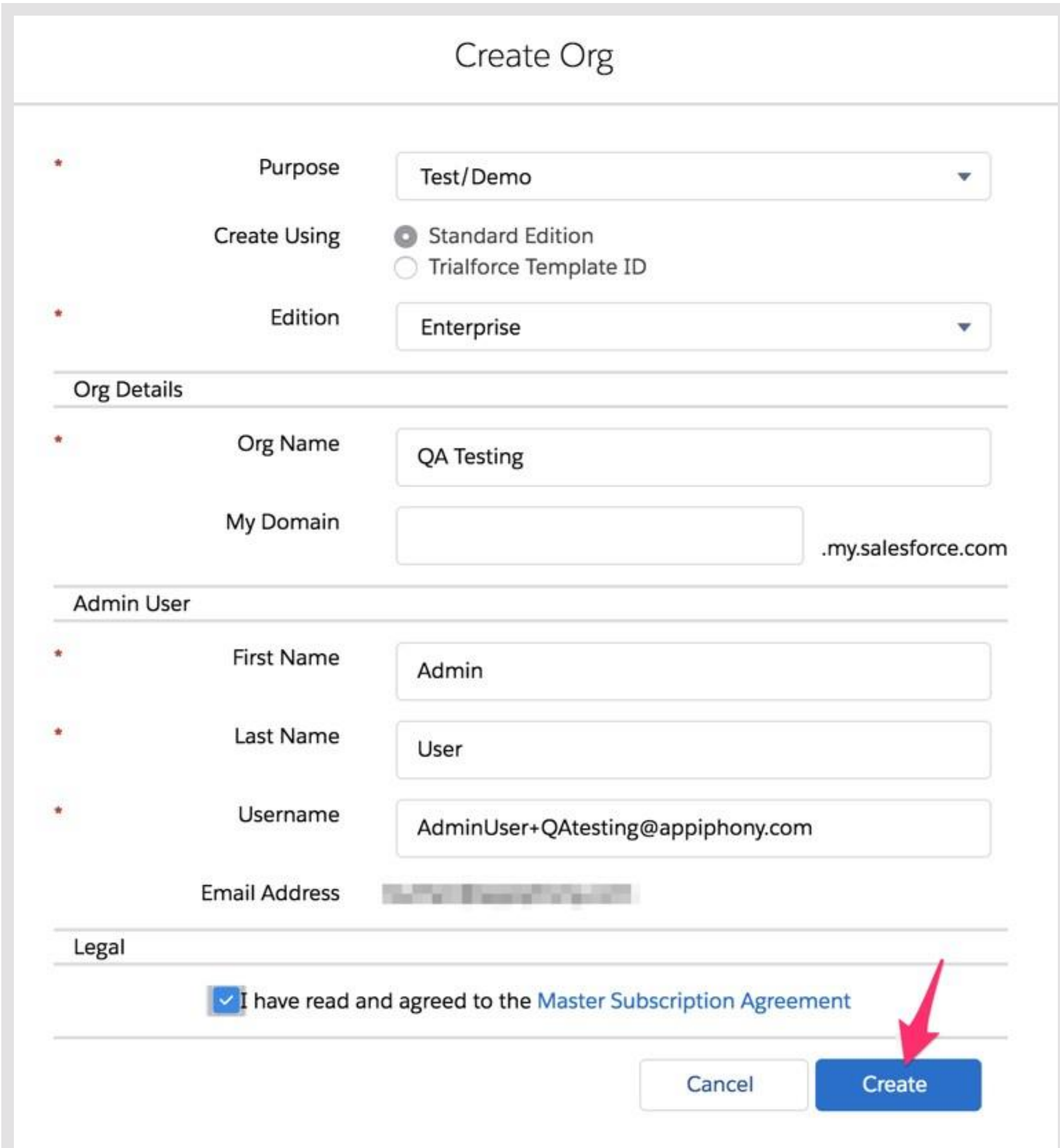
- Once logged in, click on the **App Launcher.**

- Search for Environment Hub and select the Environment Hubb app.

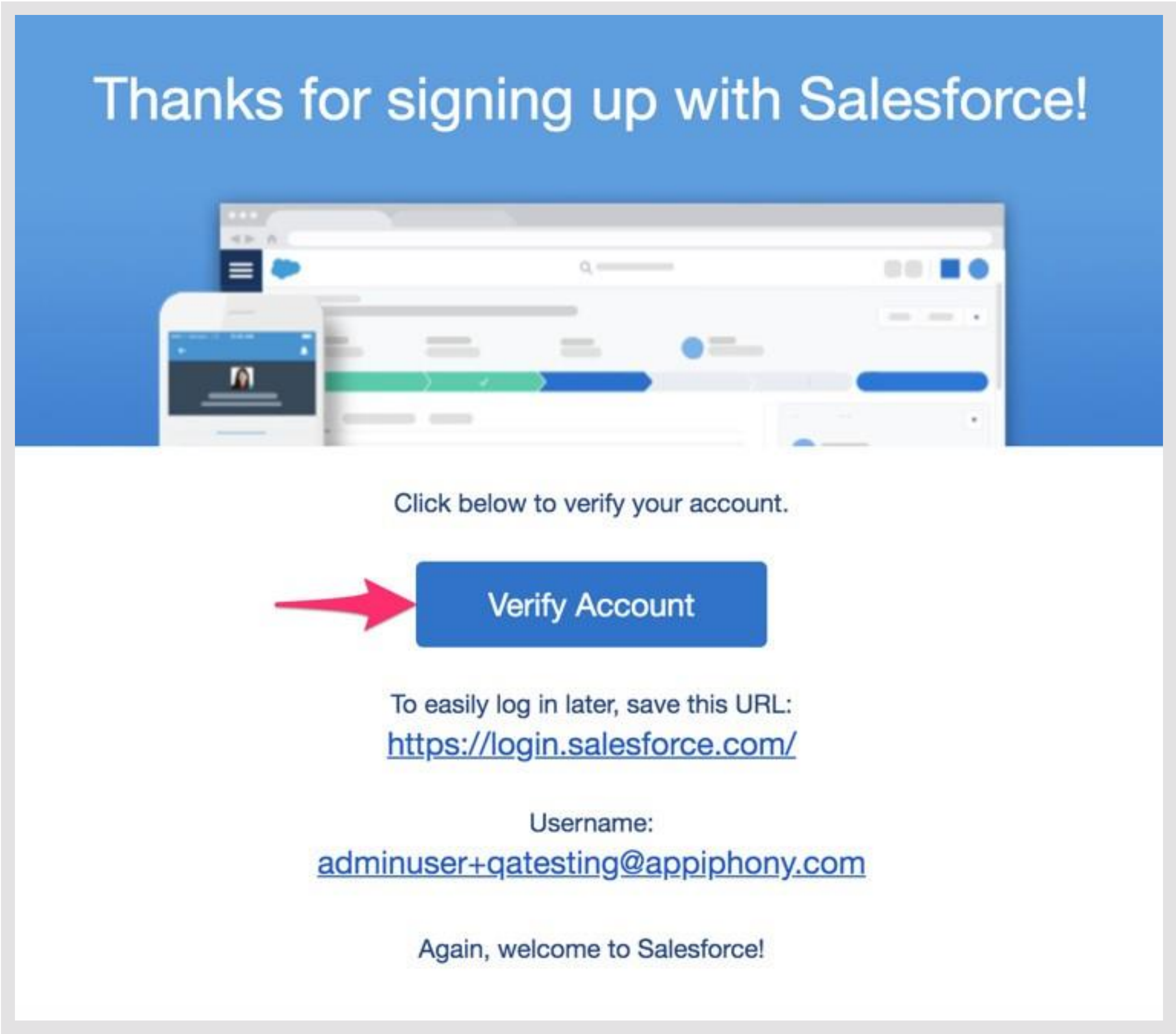


- Within Environment Hub, click **Create Org.**

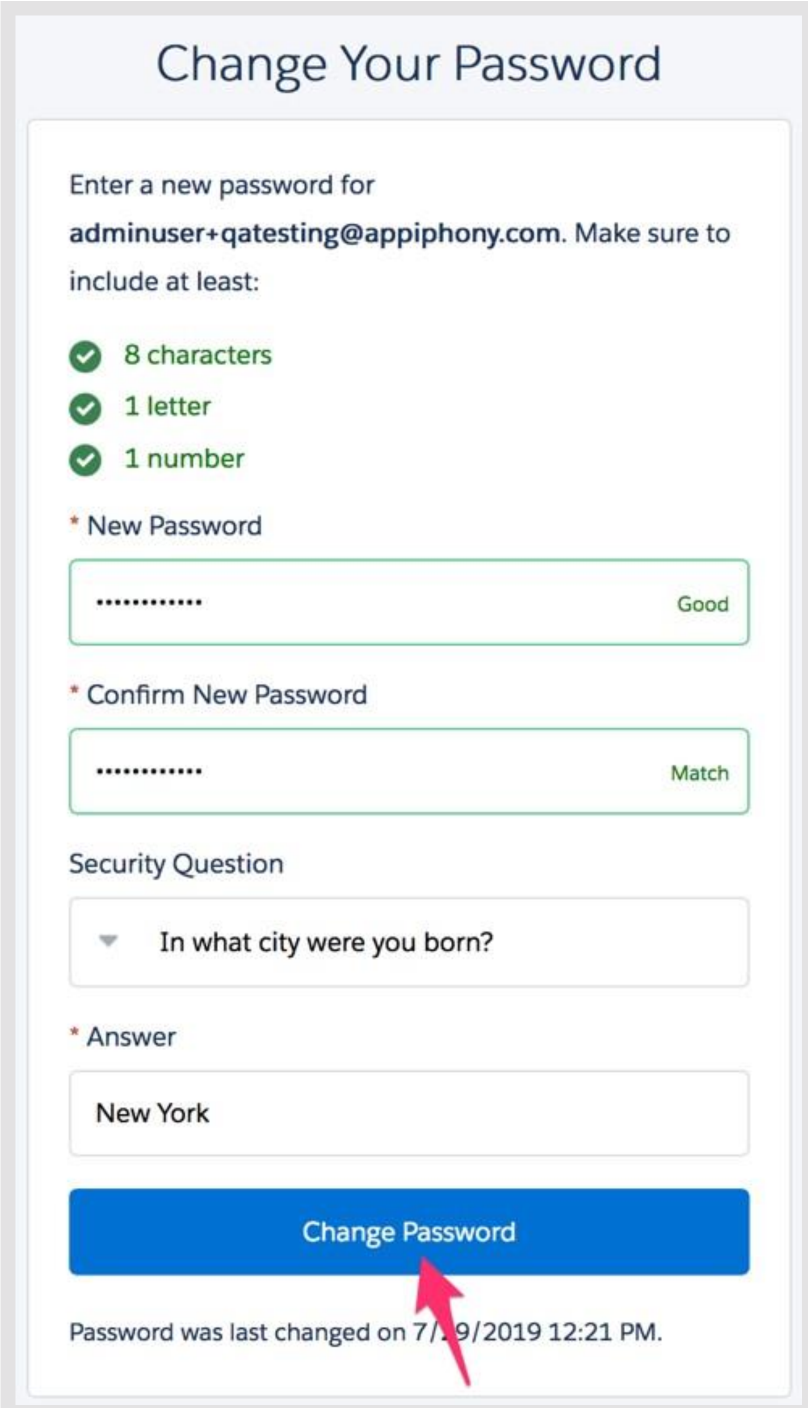
- In the Create Org modal:
  - Select the purpose of the org you are creating (For example: Test/Demo)
  - Select the Edition of the org you are creating (For example: Enterprise). For more information on editions, please see the Salesforce article on Salesforce Editions
  - Enter an Org Name for this org
  - Enter your First Name, Last Name, and a Username for this org
  - Ensure to select the check box for "I have read and agreed to the Master Subscription Agreement"
  - Click **Create**. An email to verify the account will be sent to the email address listed in the screenshot below



- Once the verification email is received, click **Verify Account.**



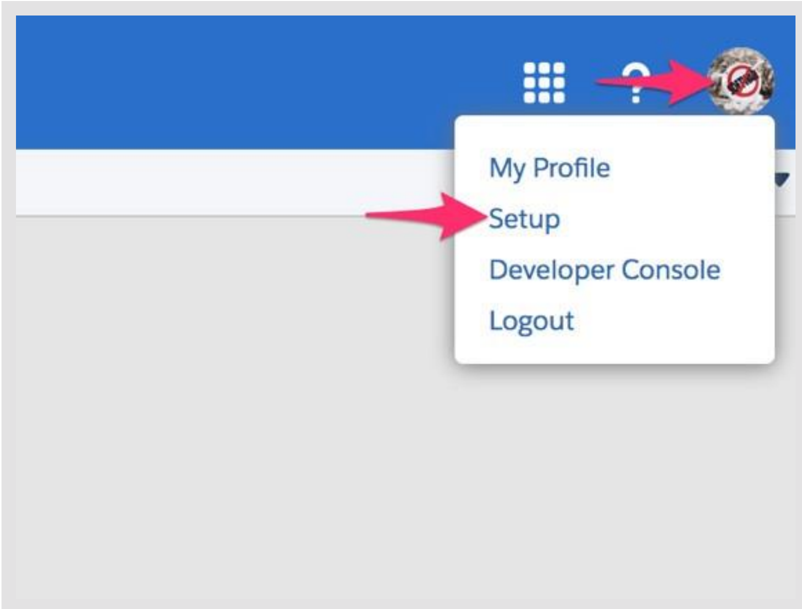
- Change your password:
  - Enter a New Password and confirm the New Password
  - Select a Security Question and enter an Answer
  - Click **Change Password**



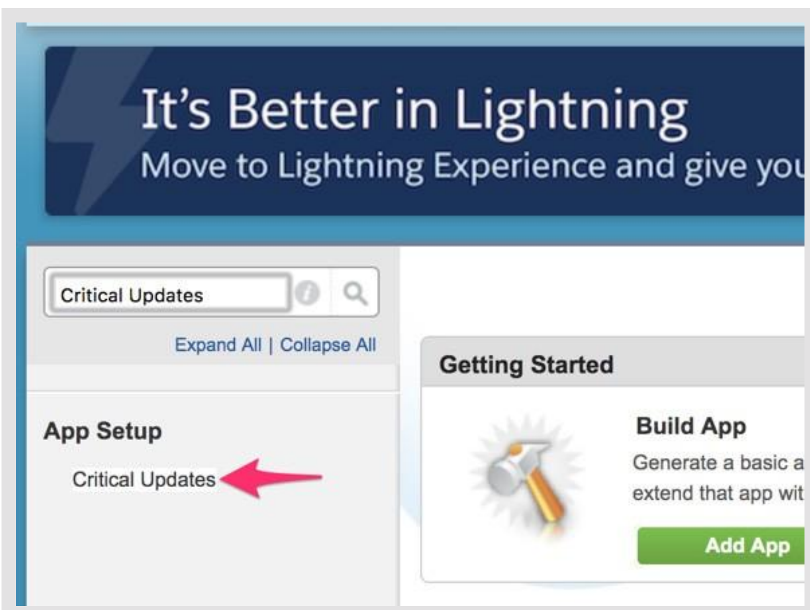
Enable Lightning Experience

If your org is not Lightning enabled, you can use the following steps to enable the Lightning Experience.

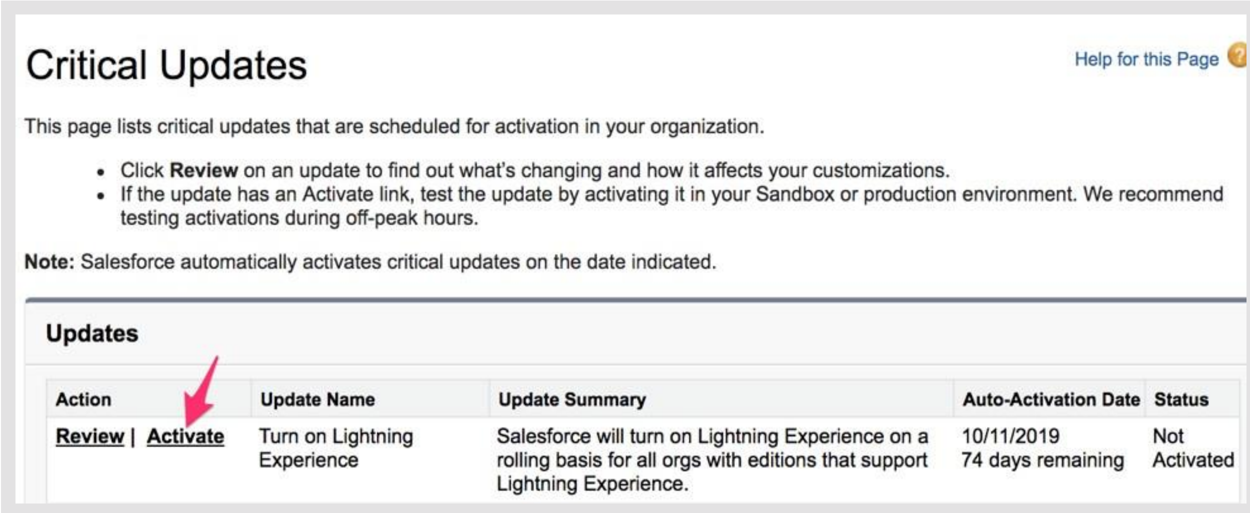
- Navigate to Classic Setup by selecting the avatar icon at the top right, and clicking **Setup**



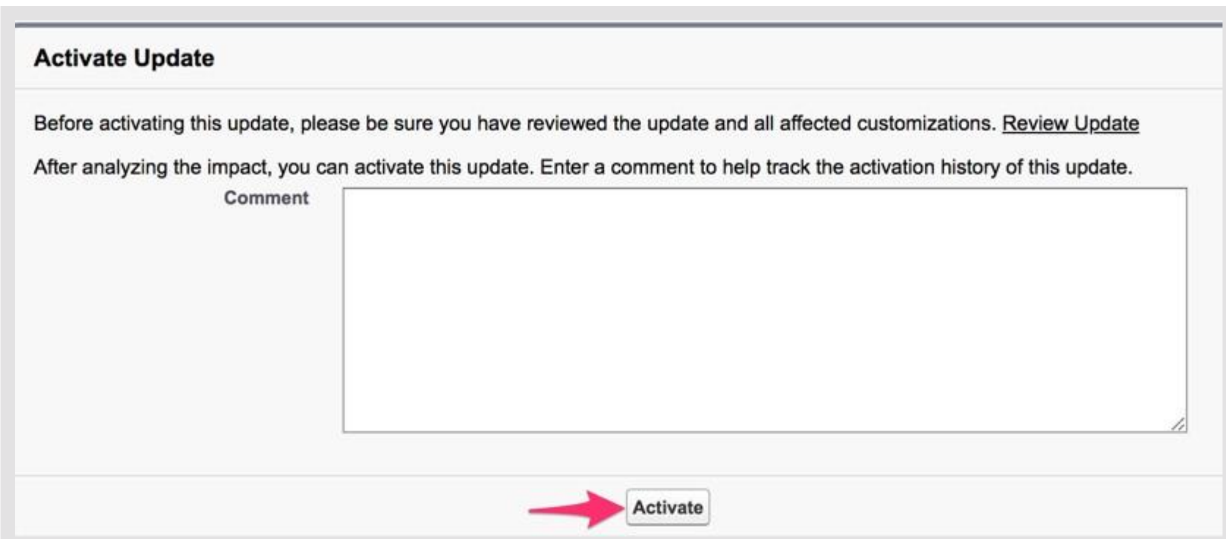
- Using the Quick Find box, search for **App Setup > Critical Updates**



- Navigate to the update name "Turn on Lightning Experience", and click **Activate**



- Click **Activate** again to enable Lightning



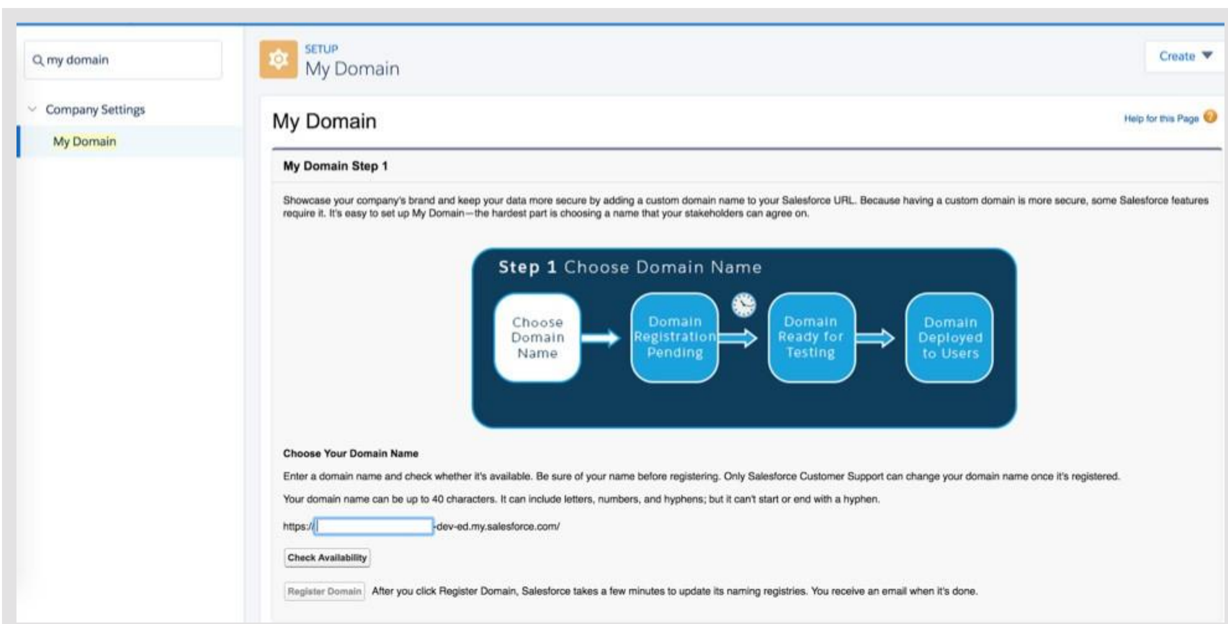
- Switch to Lightning by clicking **Switch to Lightning Experience** at the top of the page

Set up a Custom Salesforce Domain

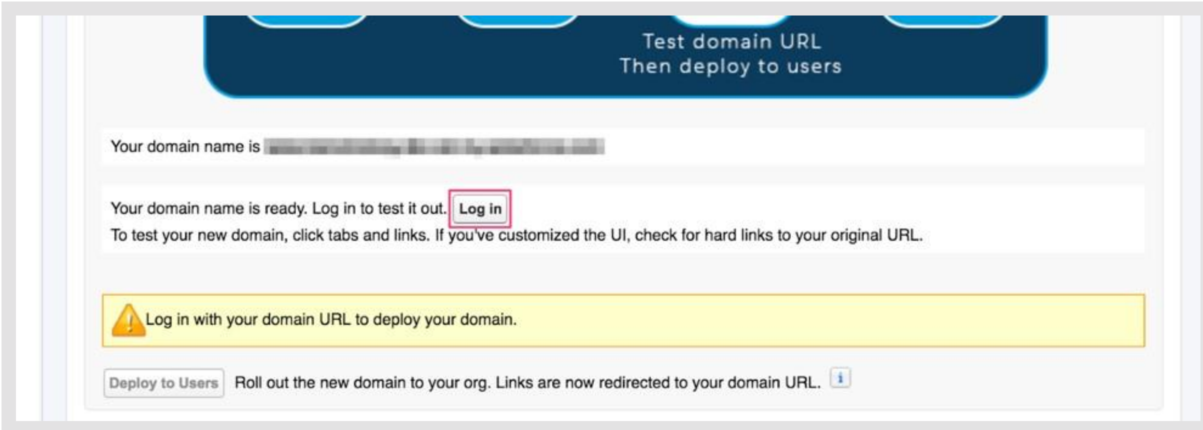
Before you install the packages to your org, be sure you have set a custom Salesforce domain for your organization. If you don't set the custom domain, you won't be able to see Lightning Components in the **Custom - Managed** section of the **Lightning App Builder** while setting up your Lightning pages.

- Navigate to **Setup > Company Settings > My Domain**

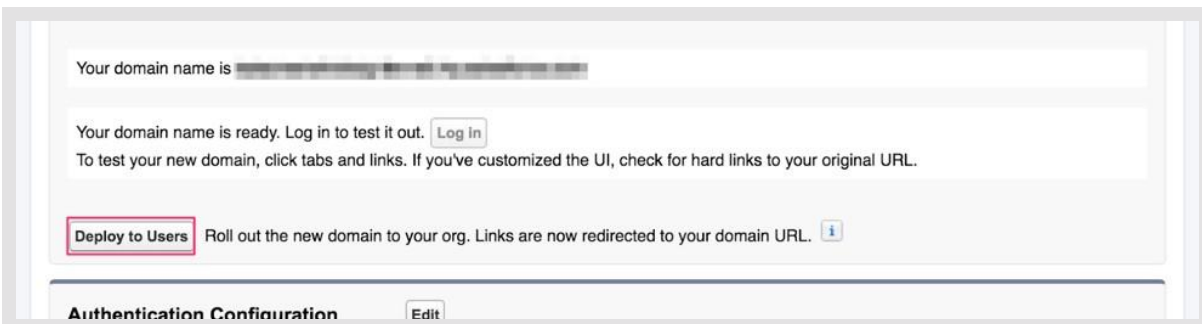
- Check for the availability of a domain and register it



- After the domain has been registered, refresh the page. You will need to log in to the new domain for the org in order to continue the process. Click on the **Log in** button and enter your credentials.



- After logging in, click **Deploy to Users**



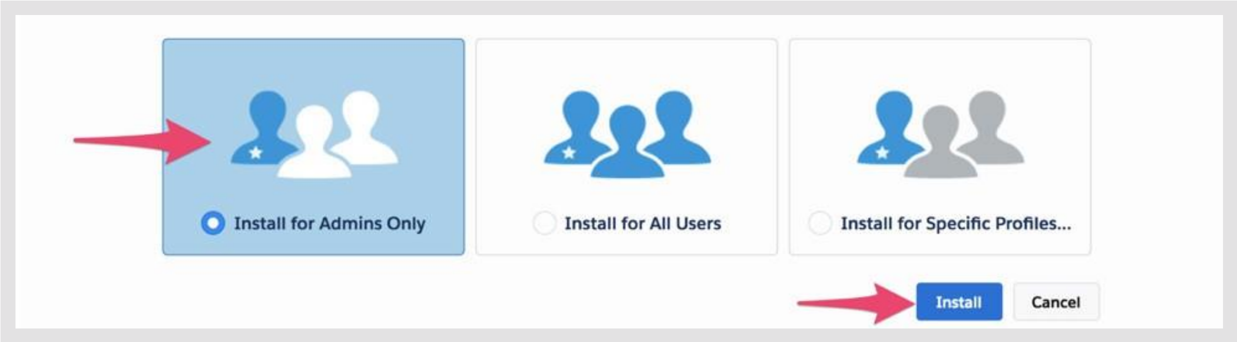
Installation

Installing the LendingTree Package

Copy and paste the package install URL into your browser's address bar (please contact your administrator for the package link). If you are not already logged into the org you wish to install the package into, salesforce will prompt you to log in.

- **Install for Admins Only** is recommended - this option allows for controlling access and permissions after the package has been installed.

For further information, [please click here to refer salesforce documentation on Package Installations.]()

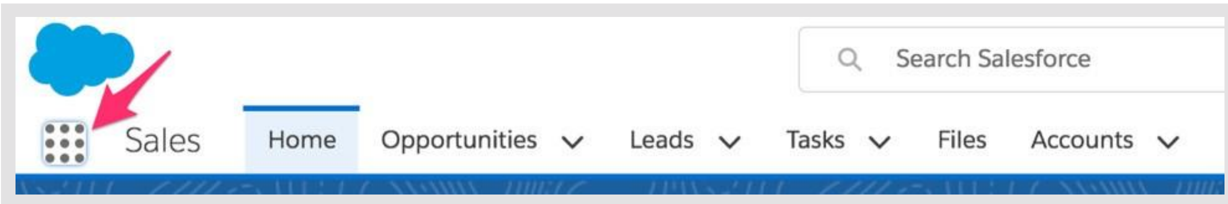


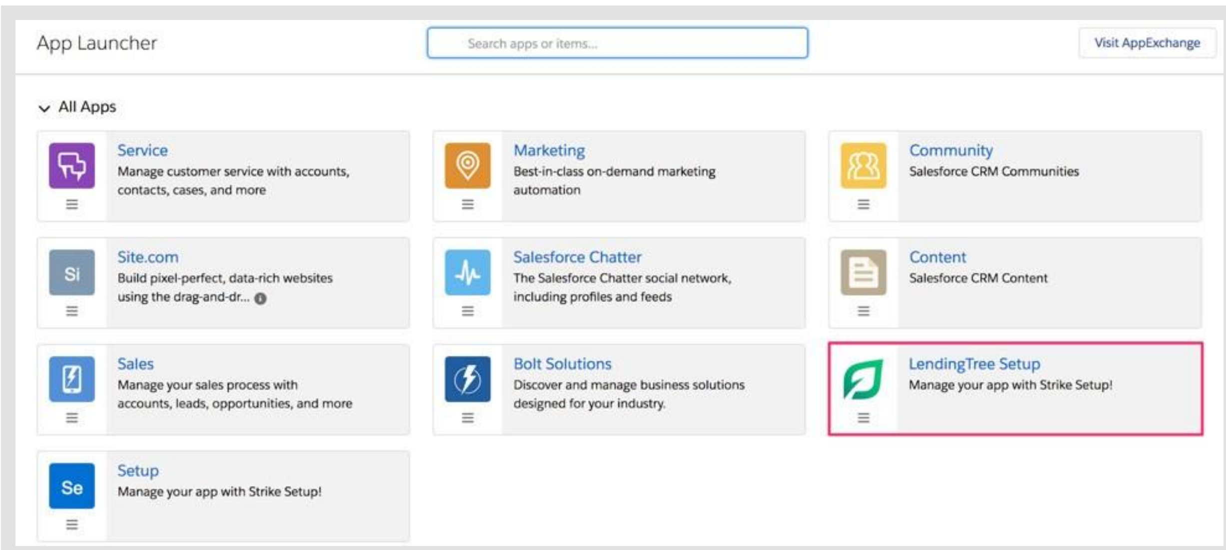
LendingTree Configuration

LendingTree Setup (Setup Assistant)

The LendingTree Setup Assistant will need to be completed to connect your Salesforce org to your LendingTree account in order to receive Lead data. To start Setup Assistant, navigate to

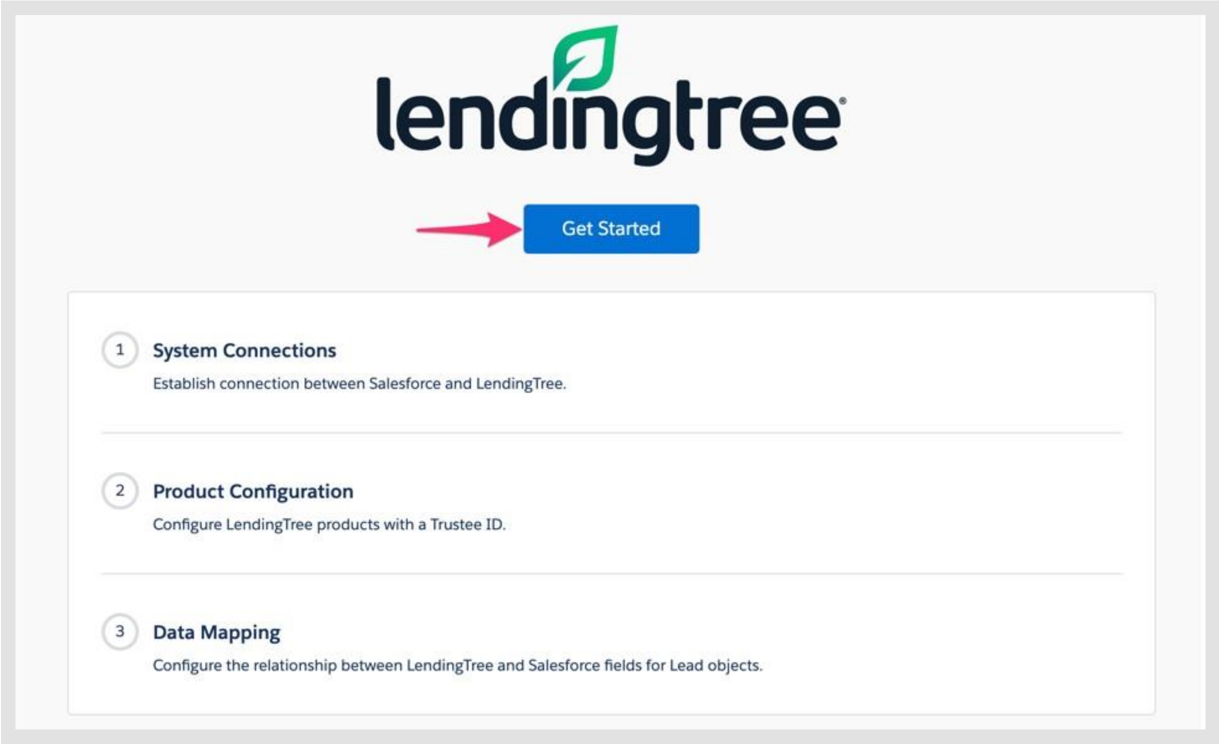
App Launcher > LendingTree Setup > Setup Assistant





System Connections

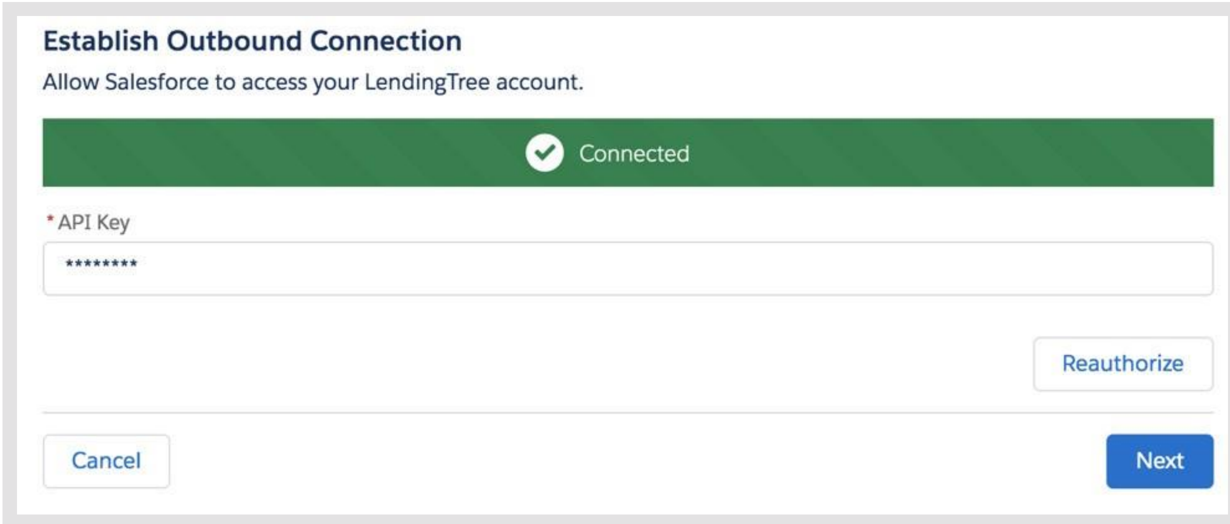
- Click **Get Started**



Enable Lighting Experience

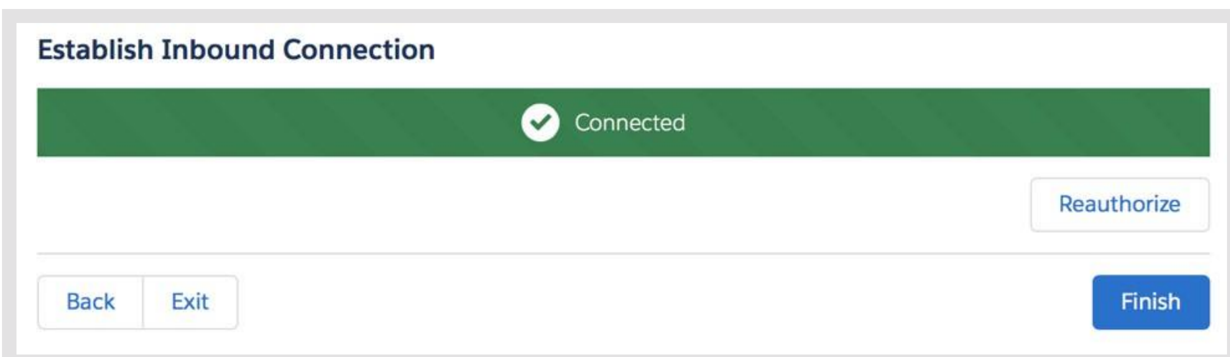
Establish Outbound Connection

- Enter your LendingTree API Key into the required field
- Click **Authorize**
- Once successfully authorized, click **Next**



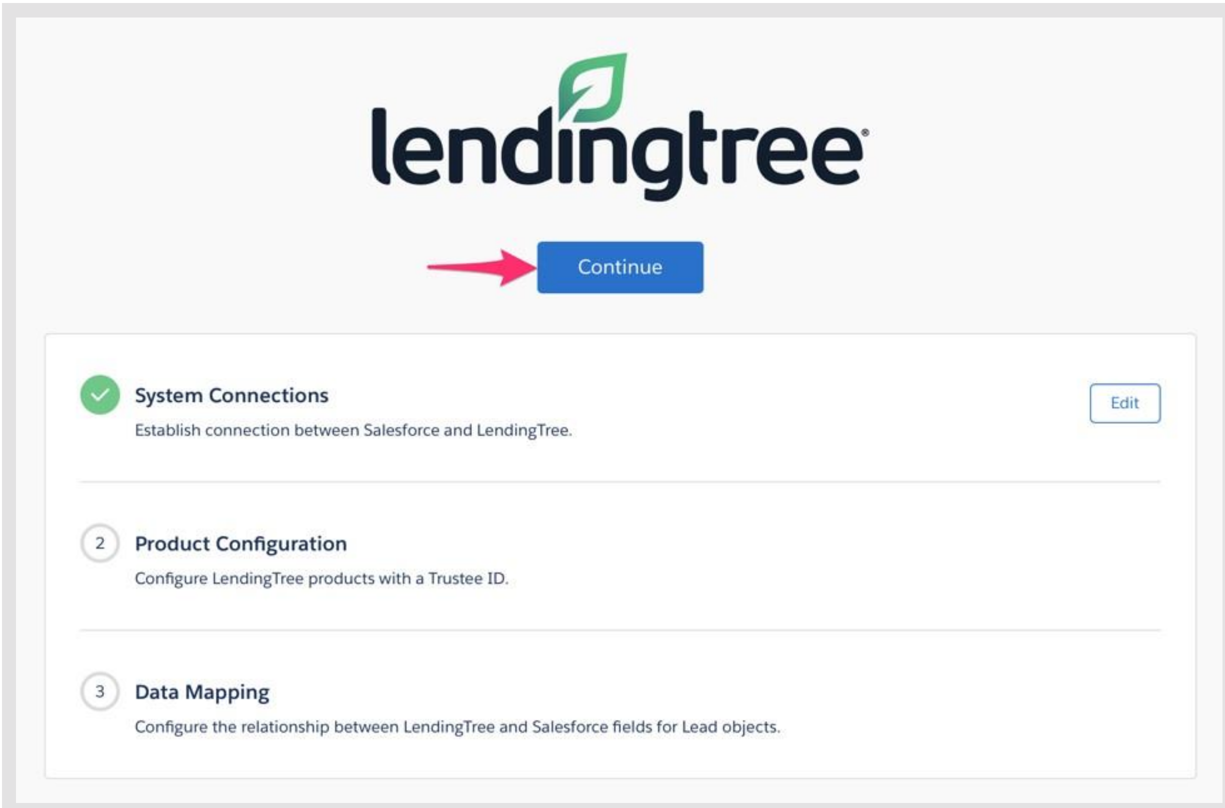
Establish Inbound Connection

- Click **Authorize**
- Login to your Salesforce account (if applicable)
- Once successfully authorized, click **Finish**

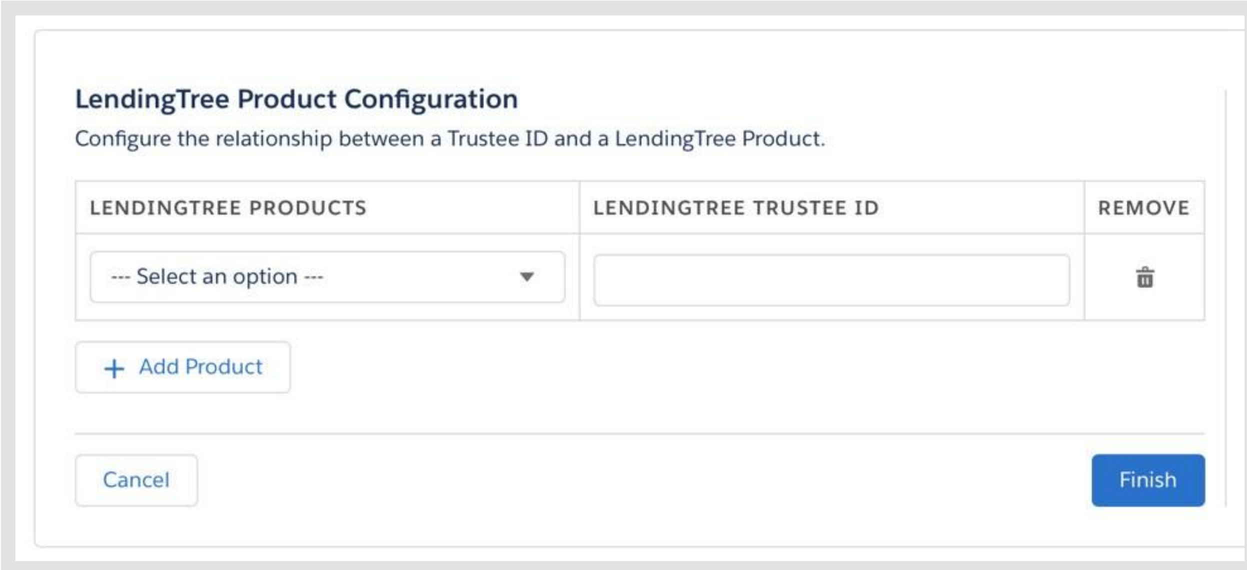


Product Configuration

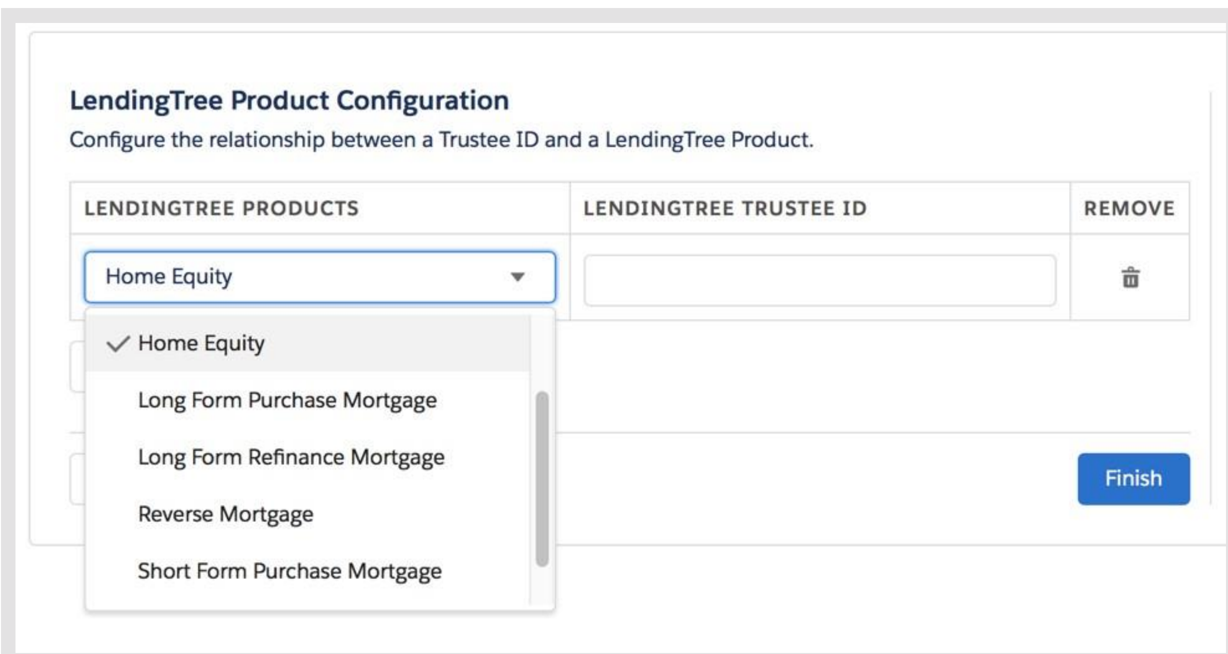
- Click **Continue** to start Product Configuration



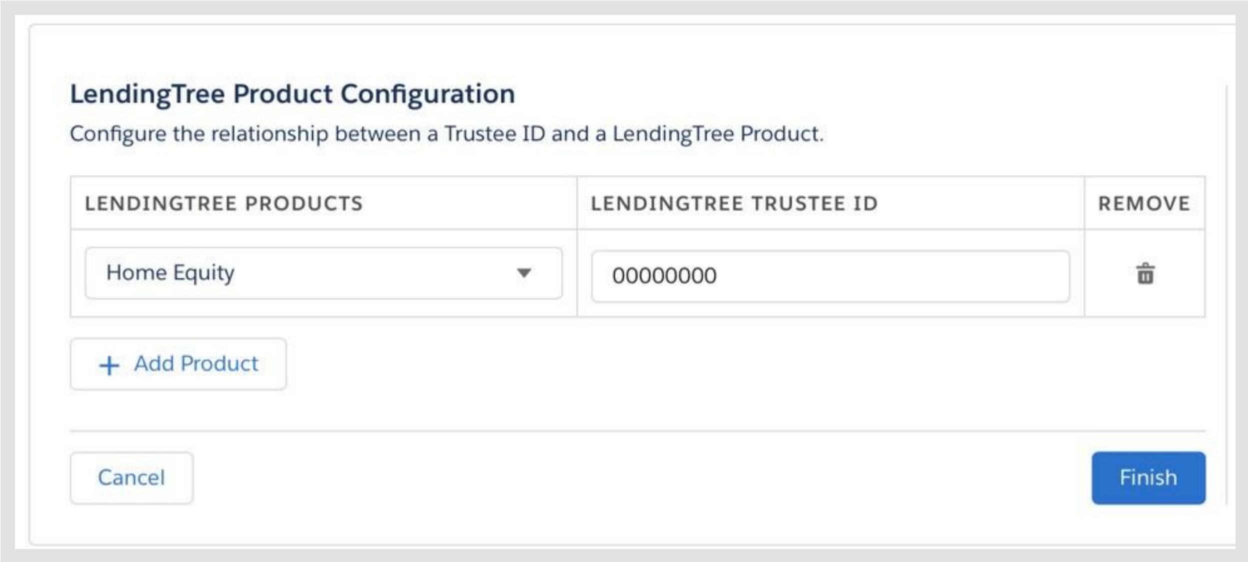
- Click **+ Add Product** configuration the relationship between LendingTree Products and a Trustee ID



- Click the **LendingTree Products** pick list and select a product

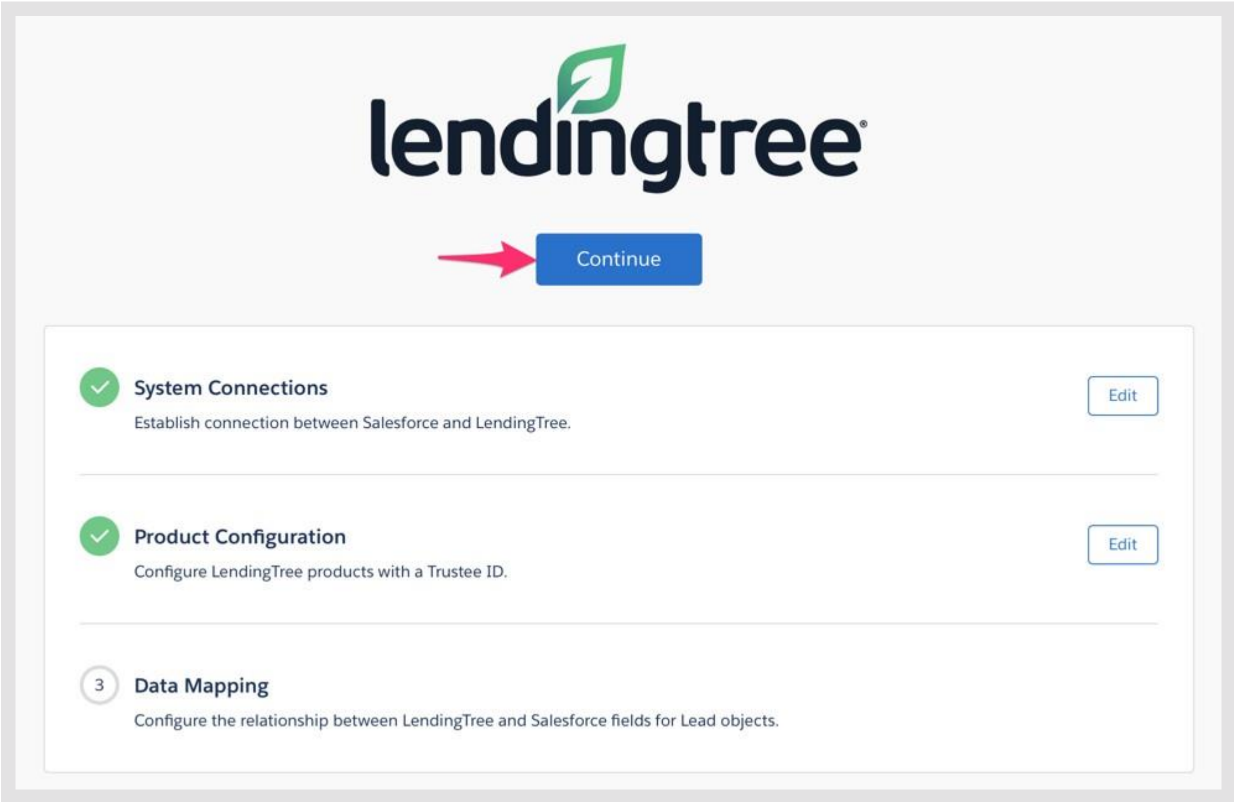


- For LendingTree TrusteeID, enter the associated TrusteeID for your selected product
    - *Repeat steps to add additional products*
- Click **Finish**

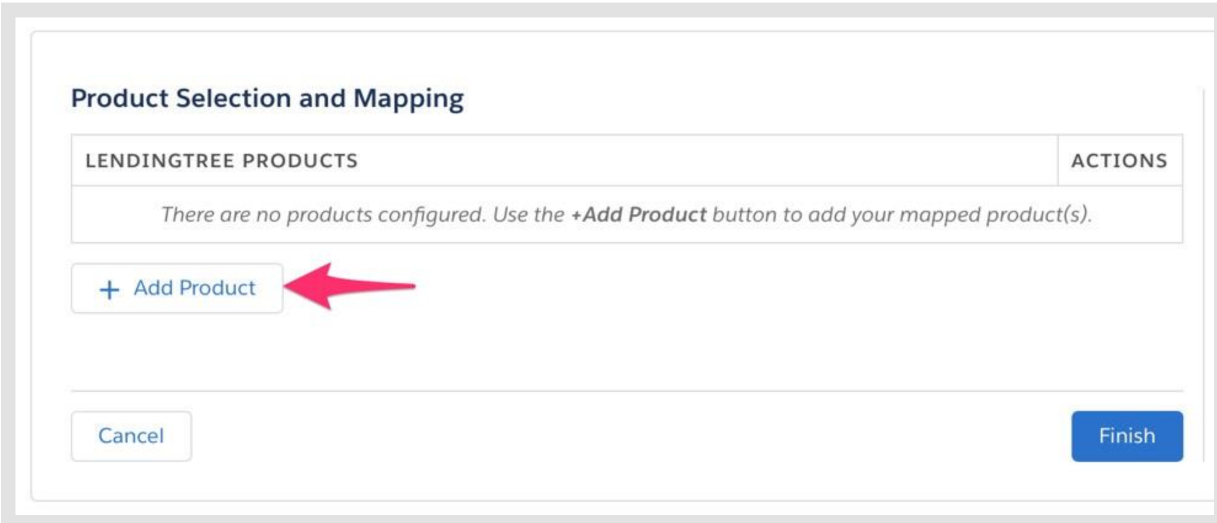


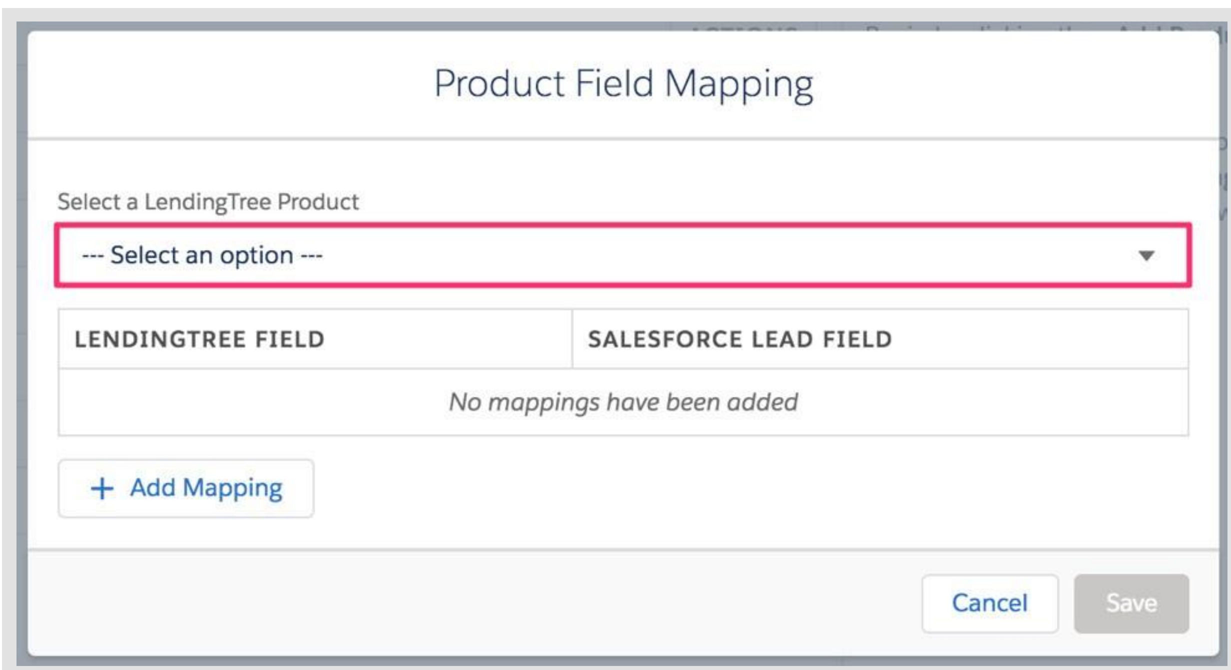
Data Mapping

- Click **Continue** to start Data Mapping

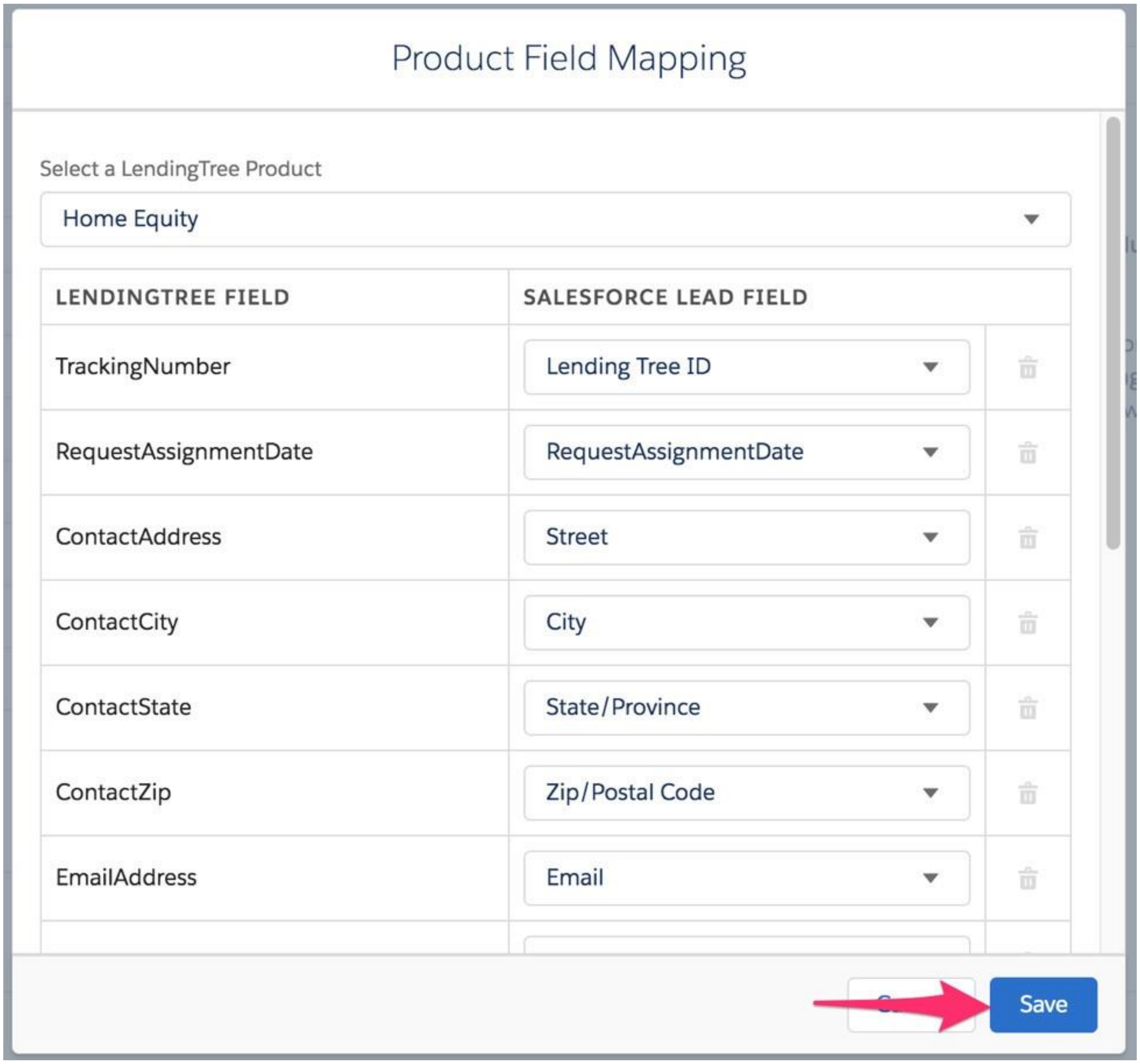


- Click **+Add Product** to open the Product Field Mapping modal
- Click **LendingTree Product** picklist and select a product





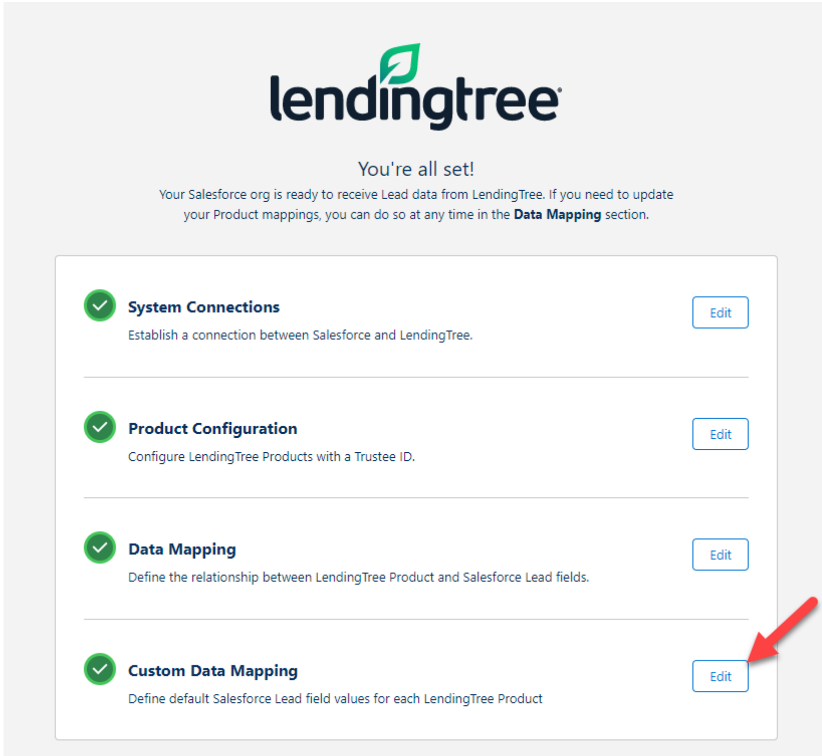
- Click **+Add Mapping**
- Map the necessary fields for your product

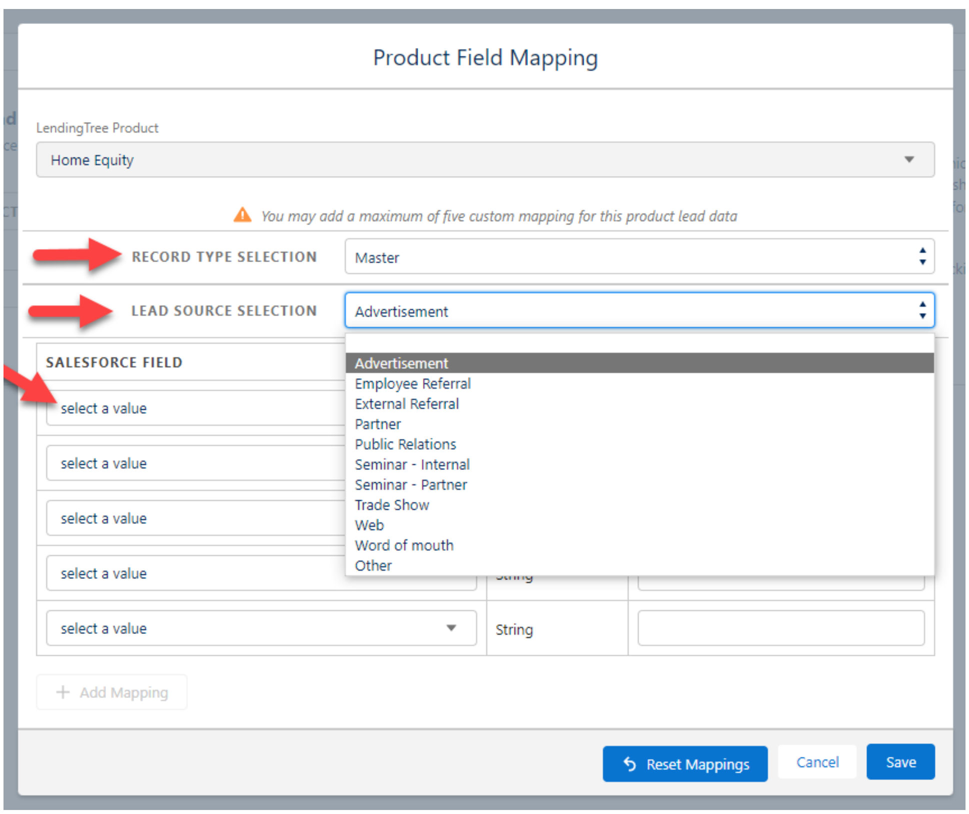


- Click **Save**
  - *Repeat steps to add additional product field mapping*

- Click **Finish**

- Optionally, click **Edit** next to Custom Data Mapping to set a Lead Record Type, a Lead Source and/or add up to 5 custom text field mappings





  - The dropdown selections for Lead Record Type and Lead Source will be the record types and sources set in your individual org.
- Map the custom fields for each product
- Click **Save**

Data Mapping Considerations

- The **Company** and **Last Name** fields in Salesforce are required in order to create a lead. If these fields are not mapped to a LendingTree field, the Lead record creation will fail.
- When creating and mapping custom Salesforce fields, each field must be of the correct field type to match to the LendingTree field, otherwise the lead object will fail to create.
  - You can use the following spreadsheet to reference each field and their field type: LendingTree Product Element Mapping
- When creating custom Lead fields in Salesforce, be sure to give the user profiles access to those custom fields.
- Check org settings for duplicate rules and ensure they are deactivated or are updated to not interfere with the creation of LendingTree Leads.

Search Frequently Asked Questions

- Click **FAQs** tab
- Use the search bar to type in keywords on what you need help with
- Click through the knowledge articles to find the answer to your questions.