

Information & Configuration

lendingtree®

salesforce

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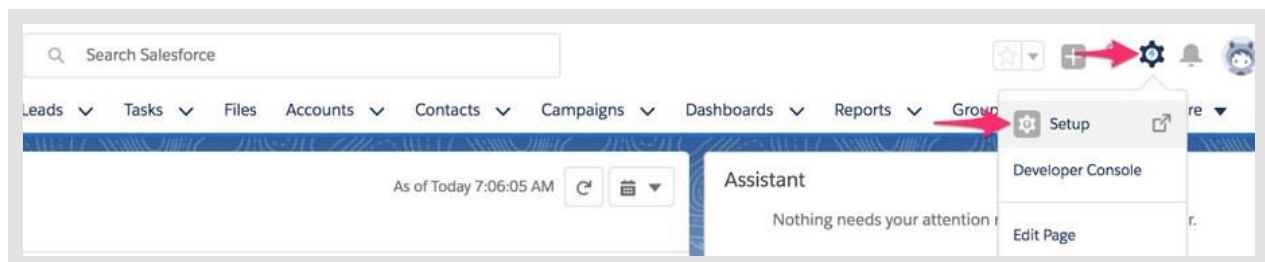
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Introduction

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.

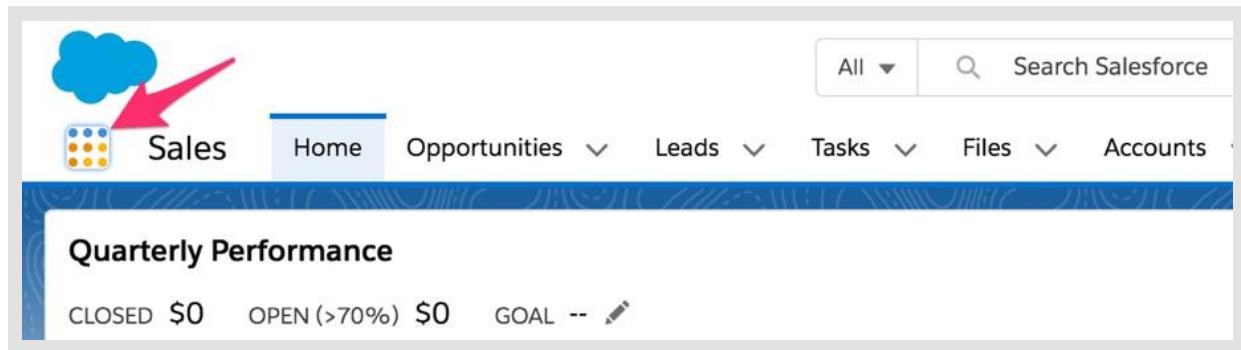


Preinstallation

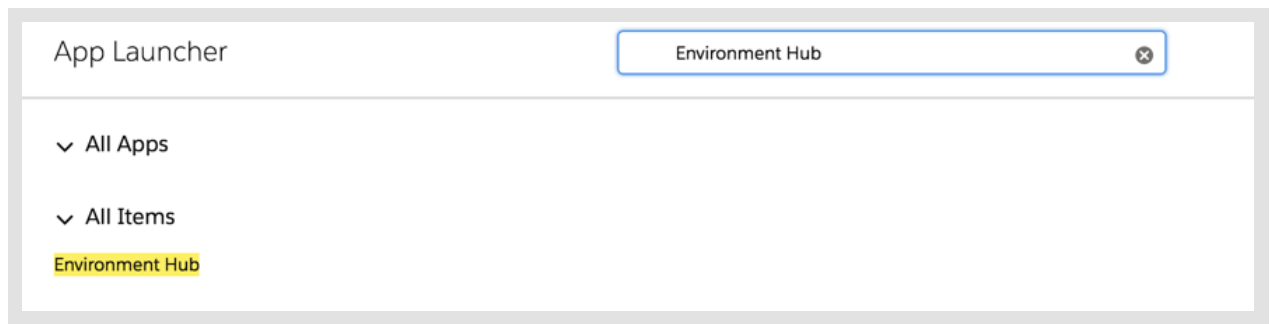
Creating a test environment from your Partner Business Org

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/>

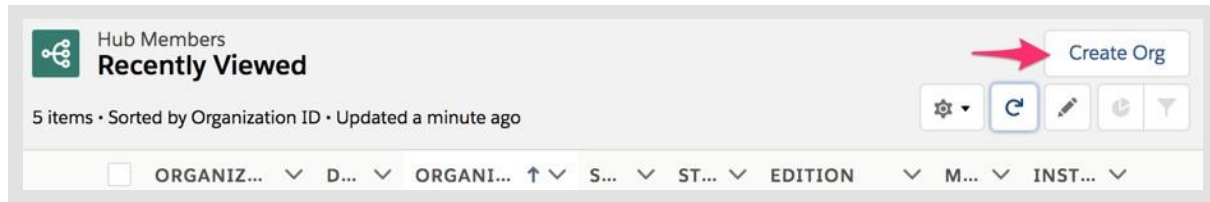
- Once logged in, click on the **App Launcher**.



- 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

The screenshot shows the 'Create Org' modal in Salesforce. The form is divided into several sections: 'Purpose' (Test/Demo), 'Create Using' (Standard Edition), 'Edition' (Enterprise), 'Org Details' (Org Name: QA Testing, My Domain: .my.salesforce.com), 'Admin User' (First Name: Admin, Last Name: User, Username: AdminUser+QAtesting@appiphony.com, Email Address: [redacted]), and 'Legal' (I have read and agreed to the Master Subscription Agreement). A red arrow points to the 'Create' button.

Create Org

Purpose Test/Demo

☐ Create Using ☒ Standard Edition ☐ Trialforce Template ID

Edition Enterprise

Org Details

Org Name QA Testing

My Domain .my.salesforce.com

Admin User

First Name Admin

Last Name User

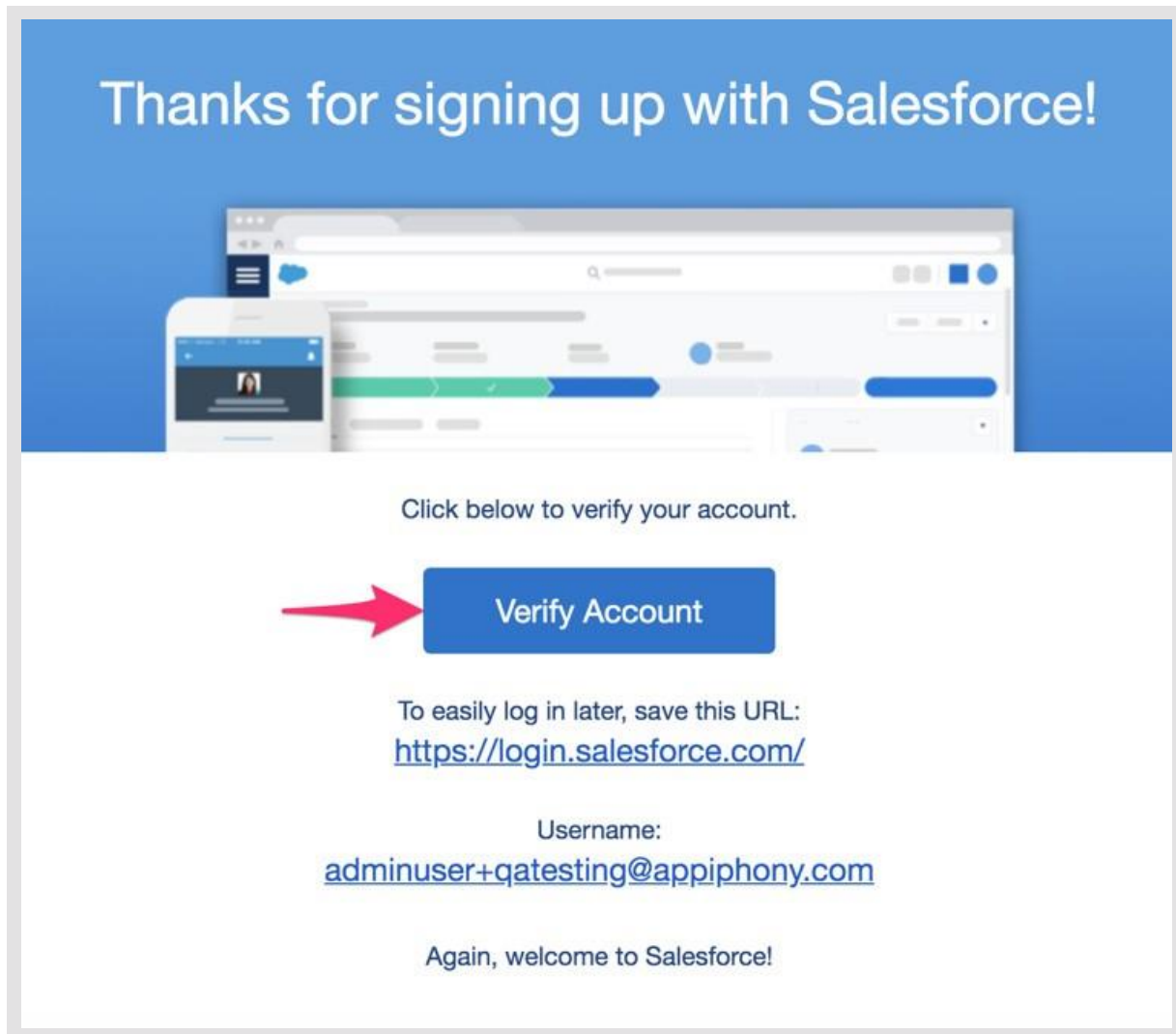
Username AdminUser+QAtesting@appiphony.com

Email Address [redacted]

Legal

☒ I have read and agreed to the [Master Subscription Agreement](#)

- 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**

Change Your Password

Enter a new password for

adminuser+qatesting@appiphony.com. Make sure to include at least:

- ✓ 8 characters
- ✓ 1 letter
- ✓ 1 number

* New Password

 Good

* Confirm New Password

 Match

Security Question

▼ In what city were you born?

* Answer

New York

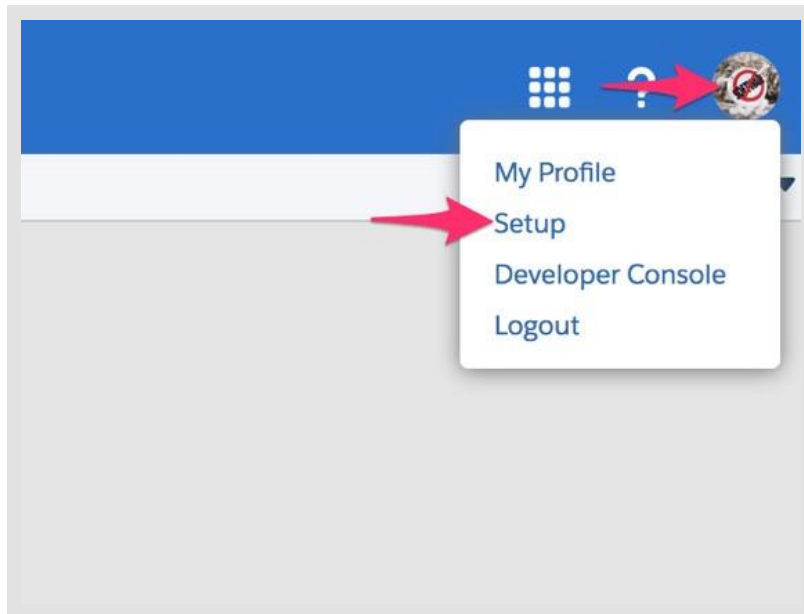
Change Password

Password was last changed on 7/19/2019 12:21 PM.

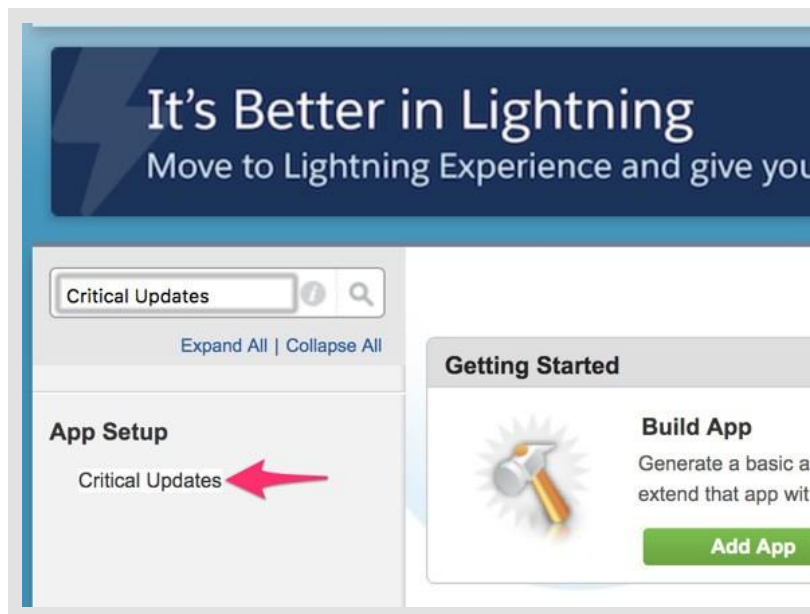
Enable Lightning Experience

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**

Critical Updates

[Help for this Page](#) ?

This page lists critical updates that are scheduled for activation in your organization.

- Click **Review** on an update to find out what's changing and how it affects your customizations.
- If the update has an Activate link, test the update by activating it in your Sandbox or production environment. We recommend testing activations during off-peak hours.

Note: Salesforce automatically activates critical updates on the date indicated.

Updates

Action	Update Name	Update Summary	Auto-Activation Date	Status
Review Activate	Turn on Lightning Experience	Salesforce will turn on Lightning Experience on a rolling basis for all orgs with editions that support Lightning Experience.	10/11/2019 74 days remaining	Not Activated

- Click **Activate** again to enable Lightning

Activate Update

Before activating this update, please be sure you have reviewed the update and all affected customizations. [Review Update](#)

After analyzing the impact, you can activate this update. Enter a comment to help track the activation history of this update.

Comment

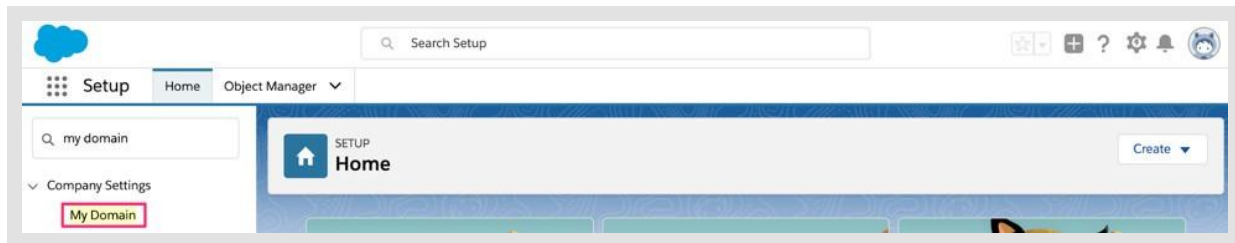
[Activate](#)

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

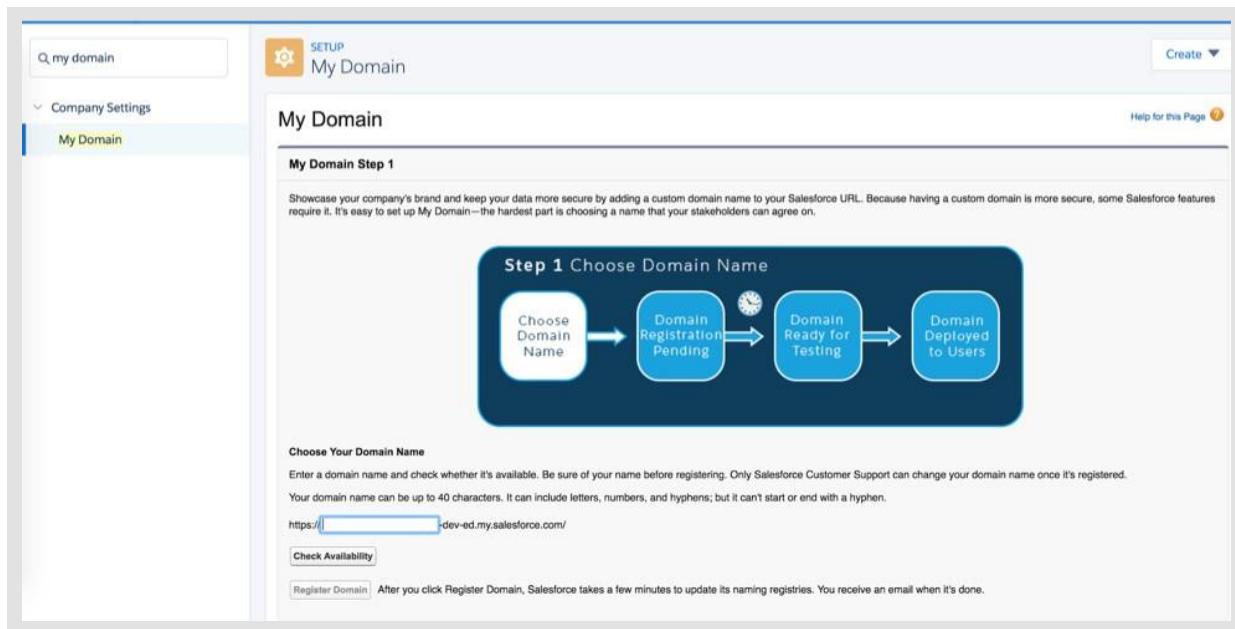
Set up a Custom Salesforce Domain

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.

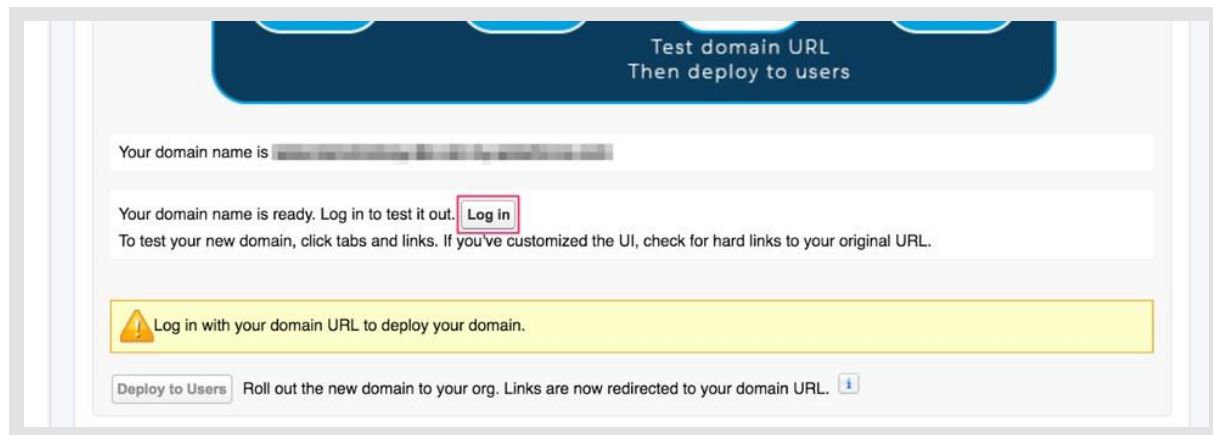
- Navigate to **Setup > Company Settings > My Domain**



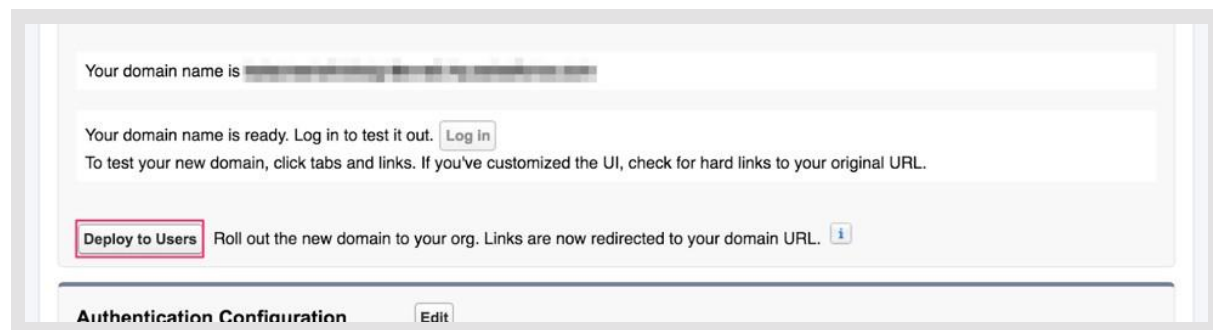
- Check for the availability of a domain and register it



- 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**



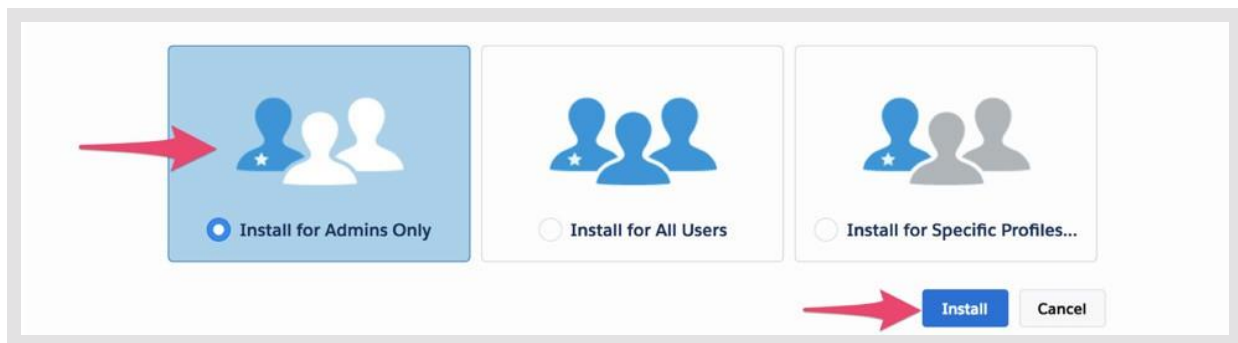
Installation

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.](#)

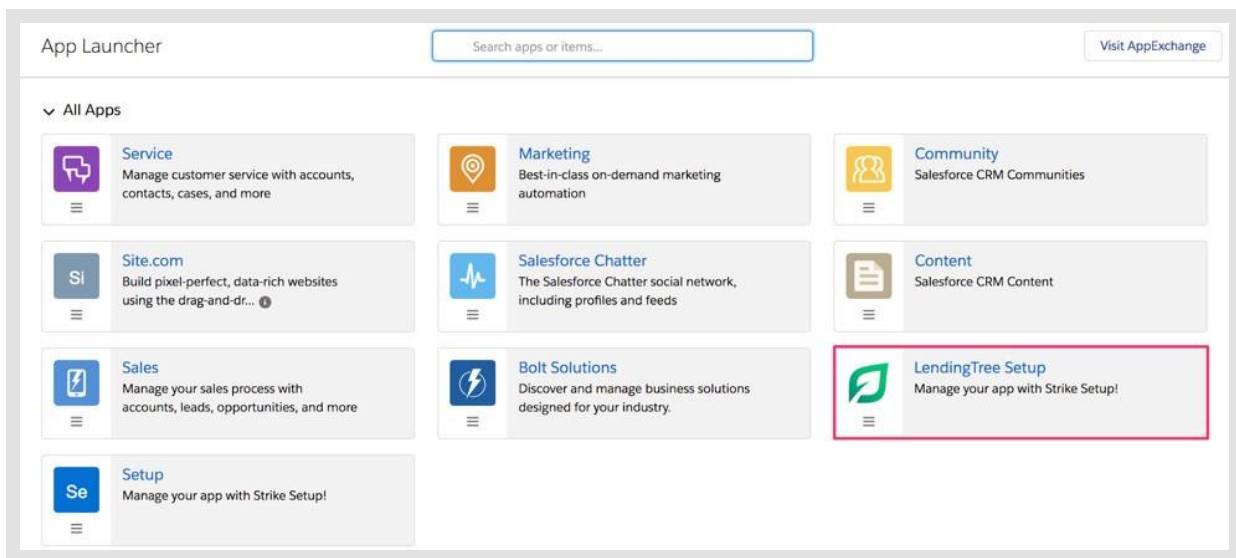
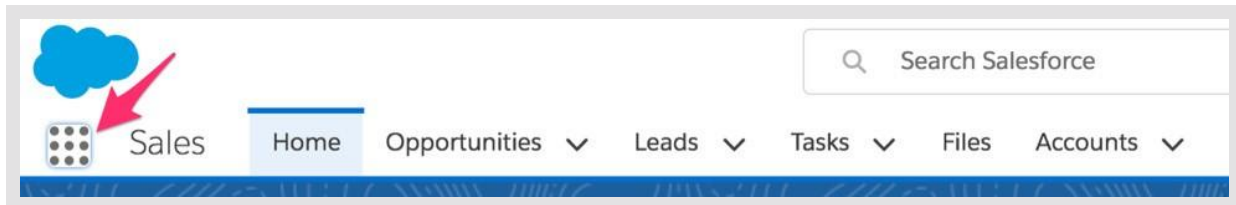


LendingTree Configuration

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**



- 1 **System Connections**
Establish connection between Salesforce and LendingTree.
- 2 **Product Configuration**
Configure LendingTree products with a Trustee ID.
- 3 **Data Mapping**
Configure the relationship between LendingTree and Salesforce fields for Lead objects.

Enable Lighting Experience

Establish Outbound Connection

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

Establish Outbound Connection

Allow Salesforce to access your LendingTree account.

✓ Connected

* API Key

Reauthorize

Cancel

Next

Establish Inbound Connection

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

Establish Inbound Connection

✓ Connected

Reauthorize

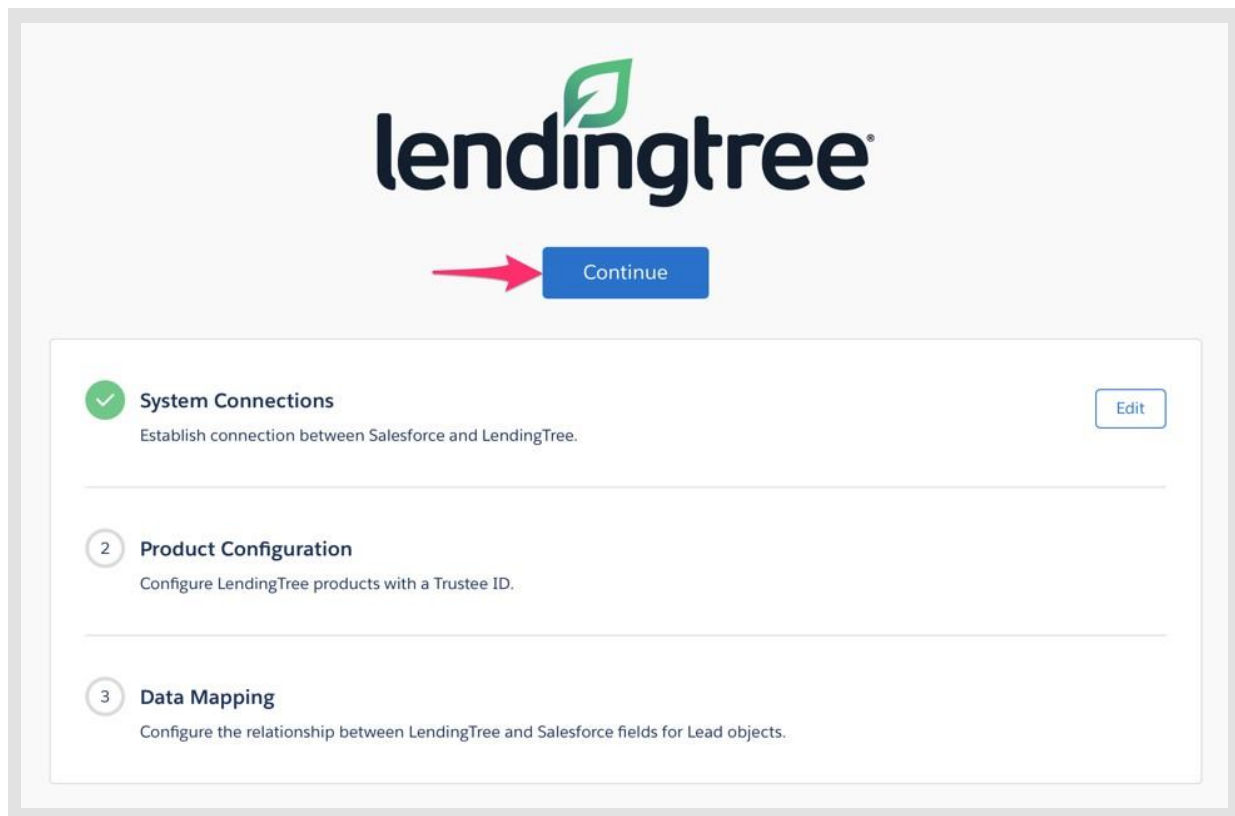
Back

Exit

Finish

Product Configuration

- Click **Continue** to start Product Configuration



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

LendingTree Product Configuration

Configure the relationship between a Trustee ID and a LendingTree Product.

LENDINGTREE PRODUCTS	LENDINGTREE TRUSTEE ID	REMOVE
--- Select an option ---		

[+ Add Product](#)

[Cancel](#) [Finish](#)

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

LendingTree Product Configuration

Configure the relationship between a Trustee ID and a LendingTree Product.

LENDINGTREE PRODUCTS	LENDINGTREE TRUSTEE ID	REMOVE
Home Equity ✓ Home Equity Long Form Purchase Mortgage Long Form Refinance Mortgage Reverse Mortgage Short Form Purchase Mortgage		

[Finish](#)

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

LendingTree Product Configuration

Configure the relationship between a Trustee ID and a LendingTree Product.

LENDINGTREE PRODUCTS	LENDINGTREE TRUSTEE ID	REMOVE
Home Equity ▼	00000000	🗑️

+ Add Product

Cancel

Finish

Data Mapping

- Click **Continue** to start Data Mapping



System Connections

Establish connection between Salesforce and LendingTree.

Edit



Product Configuration

Configure LendingTree products with a Trustee ID.

Edit



Data Mapping

Configure the relationship between LendingTree and Salesforce fields for Lead objects.

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

Product Selection and Mapping

LENDINGTREE PRODUCTS	ACTIONS
There are no products configured. Use the +Add Product button to add your mapped product(s).	
+ Add Product	

Cancel

Finish

Product Field Mapping

Select a LendingTree Product

--- Select an option ---

▼

LENDINGTREE FIELD	SALESFORCE LEAD FIELD
No mappings have been added	

+ Add Mapping

Cancel

Save

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

Product Field Mapping

Select a LendingTree Product

Home Equity ▼

LENDINGTREE FIELD	SALESFORCE LEAD FIELD	
TrackingNumber	Lending Tree ID ▼	
RequestAssignmentDate	RequestAssignmentDate ▼	
ContactAddress	Street ▼	
ContactCity	City ▼	
ContactState	State/Province ▼	
ContactZip	Zip/Postal Code ▼	
EmailAddress	Email ▼	

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

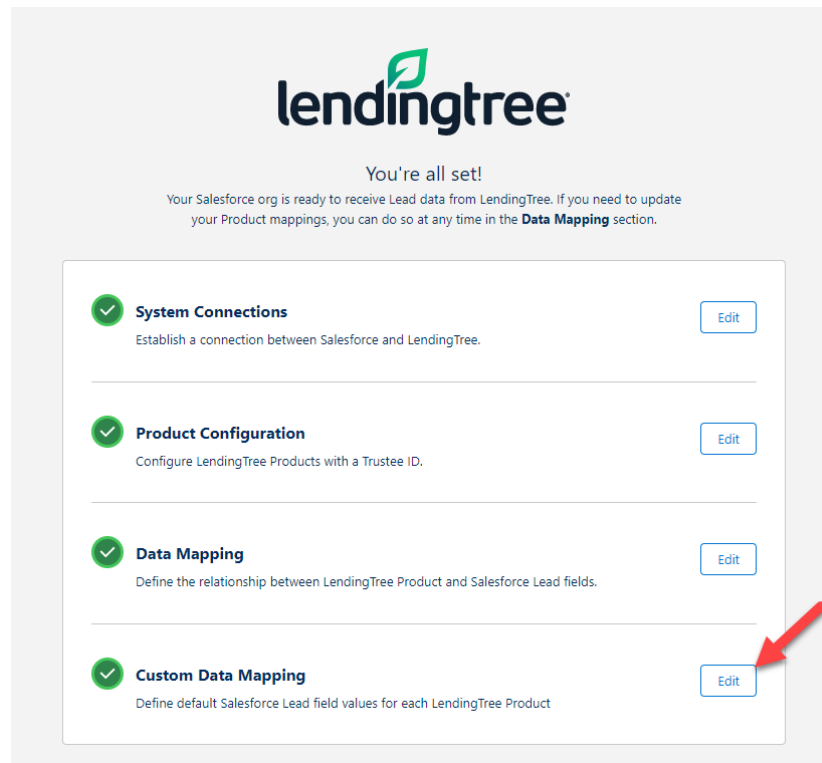
Product Selection and Mapping

LENDINGTREE PRODUCTS	ACTIONS
Home Equity	

[+ Add Product](#)

- 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.

