

Zillow® Home Value Connector

Installation & Customization Guide 2.0

Published February 2019

The screenshot displays the Zillow Home Value Connector interface. At the top, a navigation bar includes links for Sales, Home, Opportunities, Leads, Tasks, Contacts, Campaigns, and More. Below this, a header section identifies the user as Mr. Andy Young, with options to Edit, Delete, or View Contact Hierarchy. The main content area is divided into two sections: 'Related' and 'Details'. The 'Details' section shows contact information for Mr. Andy Young, including his name, phone number, mailing address (11246 Accademia Ct, Las Vegas, NV 89141, USA), account name (Dickenson plc), title (SVP, Operations), department (Internal Operations), birthdate, and email (a_young@dickenson). To the right of the contact details, there is a property information section for 11246 Accademia Ct, LAS VEGAS, NV 89141. This section includes the property's size (4 bd, 2.5 bath, 2,019 sq ft), ZESTIMATE value (\$316,135), value range (\$300,328 - \$331,942), and last sold date (06/28/2016) for \$240,000. A small line graph shows the property's value history from April 5 to April 9. Below the property information, a table lists nearby properties with their addresses, sold prices, sold dates, and square footages.

COMPA...	SOLD P...	SOLD ON	SQ FT
11197 Antonino W...	\$519,000	Oct 12, 2018	3,651
11010 Pentland D...	\$368,000	Oct 31, 2018	2,350
3576 Laguna Vene...	\$251,300	Dec 3, 2018	1,151
11231 Tuscolana St	\$391,600	Dec 5, 2018	2,943
11010 Alora St	\$292,000	May 1, 2018	1,714

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Welcome to the Zillow® Connector for Salesforce!

The Zillow® Connector for Salesforce is a tool to display Zillow® Zestimate® home valuations along with other pertinent property and comparable information directly onto your Lead, Account, Contact or Opportunity detail page.

How to use this Installation and Customization Guide.

This guide will describe the steps to get the Connector up and running with screenshots for reference.

Go to the following URL or search for the application on the AppExchange

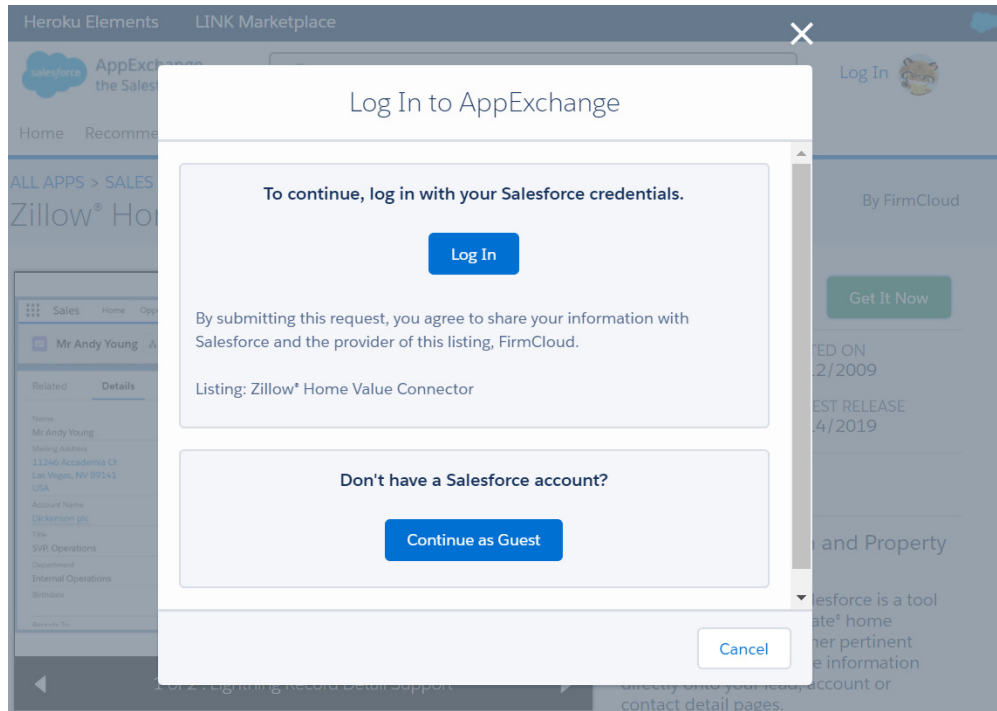
<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N300000016czREAQ>

The screenshot displays the AppExchange listing for the Zillow Home Value Connector. At the top, the Salesforce AppExchange logo and a search bar are visible. The navigation bar includes links for Home, Recommended, Solutions by Type, Product Collections, Industry Collections, and Ohana. The main header shows the breadcrumb 'ALL APPS > SALES > SALES INTELLIGENCE' and the app name 'Zillow® Home Value Connector' by FirmCloud. The app is listed as 'Free' with a 'Get It Now' button. It has a 5-star rating from 19 reviews, listed on 3/12/2009, and a latest release on 1/14/2019. The categories are 'Sales Intelligence'. A preview of the app interface shows a contact record for Mr. Andy Young with property details for 11246 Accademia Ct, Las Vegas, NV 89141. The interface includes a sidebar with contact details, a main area with property information and a Zestimate, and a table of comparable properties. The bottom of the preview shows '1 of 2 : Lightning Record Detail Support'.

COMP.	SOLD P...	SOLD ON	SQ FT
11187 Arroyo Rd.	\$519,000	Oct 12, 2018	3,651
11010 Portland Dr.	\$388,000	Oct 31, 2018	3,350
2079 Laguna View...	\$275,000	Dec 3, 2018	3,131
11211 Tuscany St	\$391,800	Dec 5, 2018	3,963
11001 Olive St	\$292,000	May 1, 2018	1,734

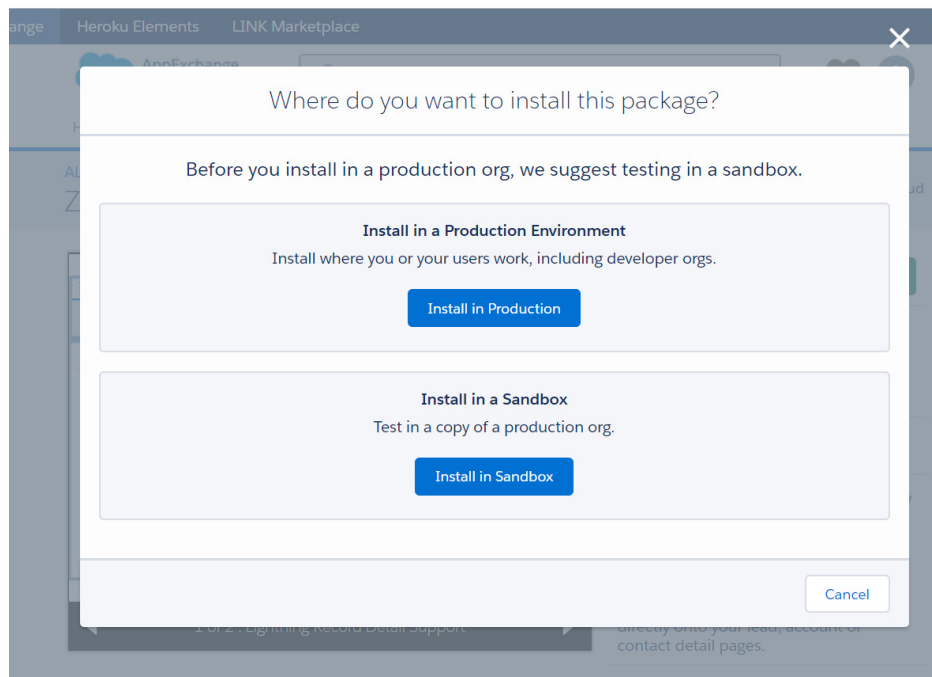
Click on “Get It Now”

Click **Log In** to the AppExchange

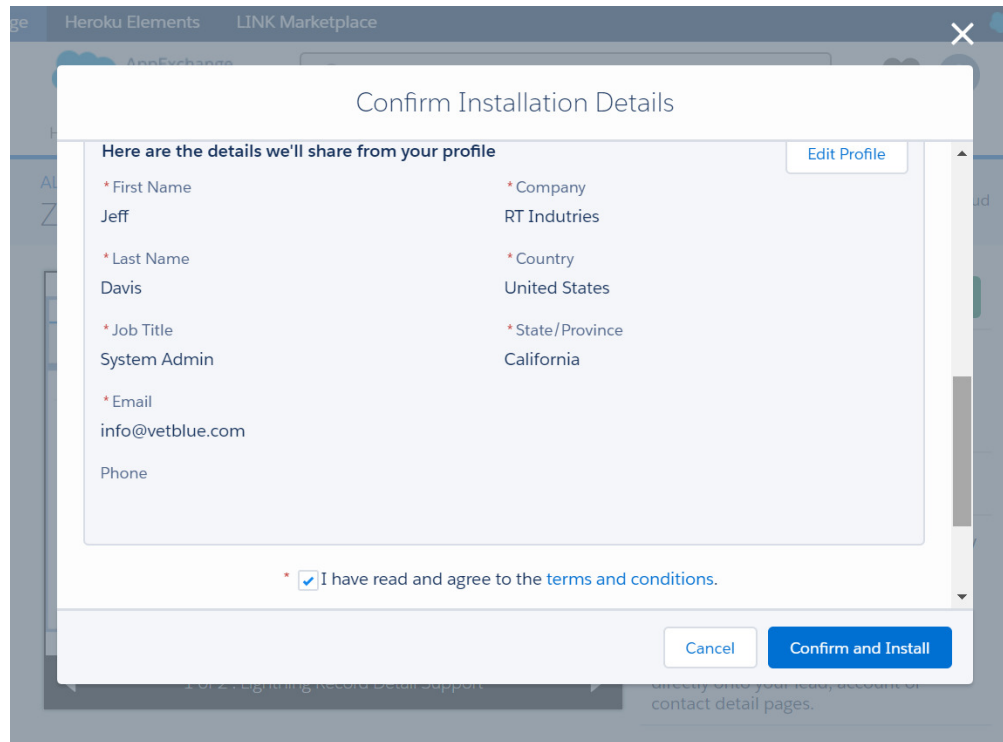


Log in with your Salesforce credentials. Note that you must be a Salesforce Administrator to be able to install packages from the AppExchange like the Zillow® Connector.

Choose the Environment where you would like to install the package



Complete the Profile information if fields are missing then Read and Accept the Terms & Conditions and then Click “Confirm and Install”



The image shows a 'Confirm Installation Details' dialog box. It contains a list of profile details to be shared, with an 'Edit Profile' link. The details include First Name (Jeff), Last Name (Davis), Job Title (System Admin), Email (info@vetblue.com), Company (RT Industries), Country (United States), and State/Province (California). There is also a checkbox for 'I have read and agree to the terms and conditions.' and buttons for 'Cancel' and 'Confirm and Install'.

Here are the details we'll share from your profile	
* First Name	* Company
Jeff	RT Industries
* Last Name	* Country
Davis	United States
* Job Title	* State/Province
System Admin	California
* Email	
info@vetblue.com	
Phone	

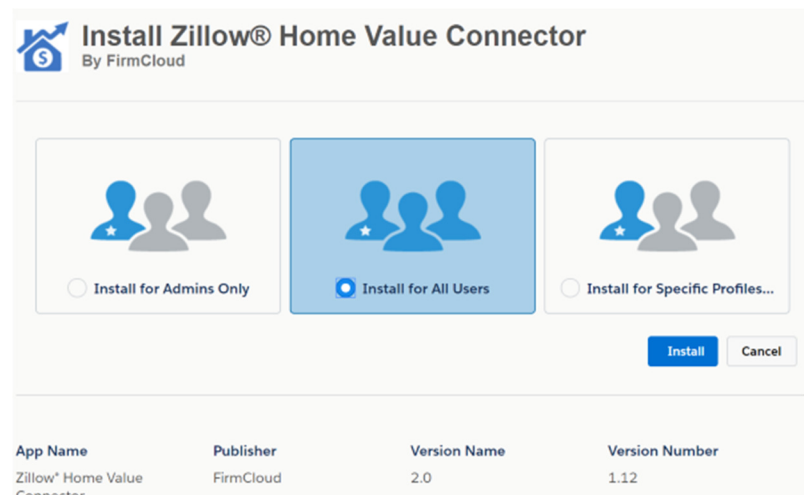
* ☒ I have read and agree to the [terms and conditions](#).

[Edit Profile](#)

[Cancel](#) [Confirm and Install](#)

Log in with your Salesforce credentials. Note that you must be a Salesforce Administrator to be able to install packages from the AppExchange like the Zillow® Connector.

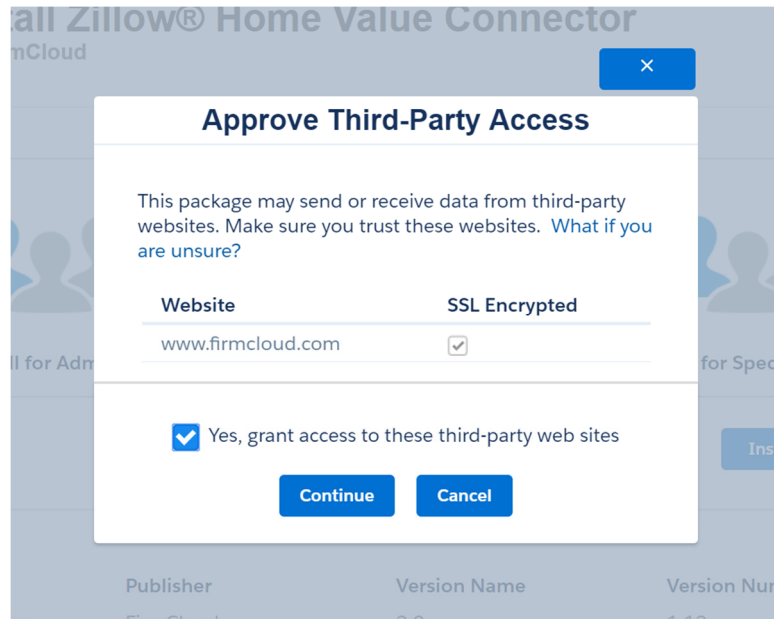
Now select the visibility of the App. And click **Install**



The image shows the 'Install Zillow® Home Value Connector' dialog box by FirmCloud. It features three radio button options for user visibility: 'Install for Admins Only', 'Install for All Users' (which is selected), and 'Install for Specific Profiles...'. There are 'Install' and 'Cancel' buttons. Below the options is a table with app details.

App Name	Publisher	Version Name	Version Number
Zillow® Home Value Connector	FirmCloud	2.0	1.12

Approve Third-Party Access to FirmCloud servers for the processing of your request. Click **Continue**.



The installation may take a few minutes. Once it is complete you will need to add the Zillow Connector to the layout based on your requirements.

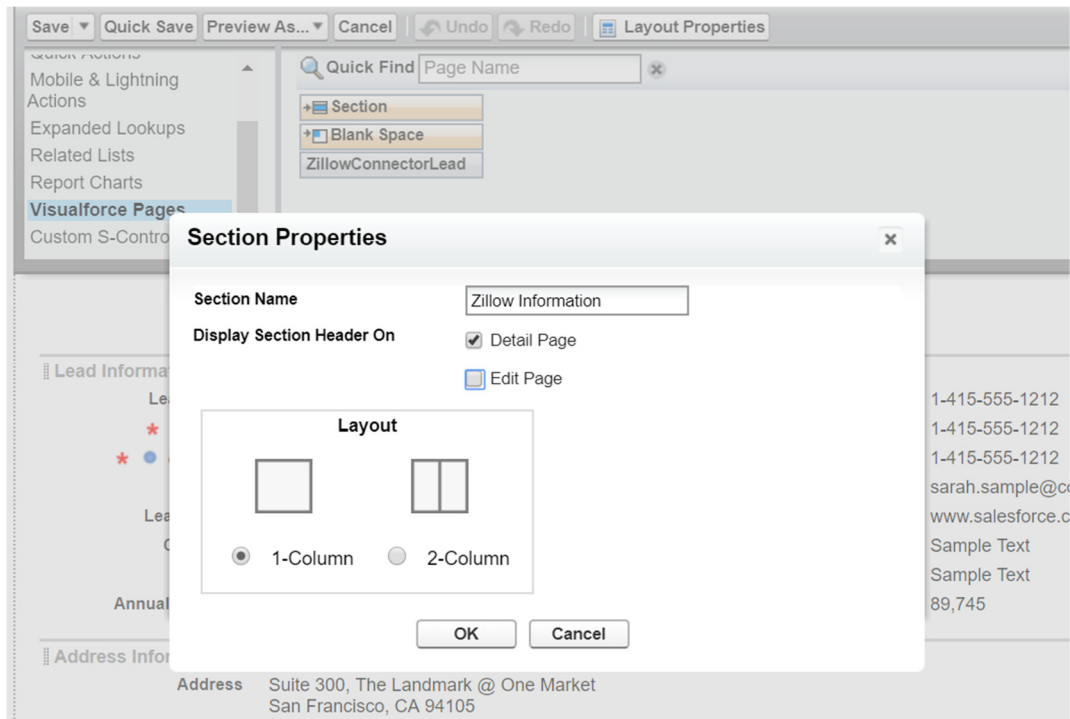
To add the Connector to Salesforce Classic view

Go to **Setup->Customize->Leads (or Accounts or Contact or Opportunity)-> Page Layout**. Select the layout in your instance where you would like to add the Zillow® Information section and click Edit. This could be the default Page Layout for all users or a specific user (such as Sales).

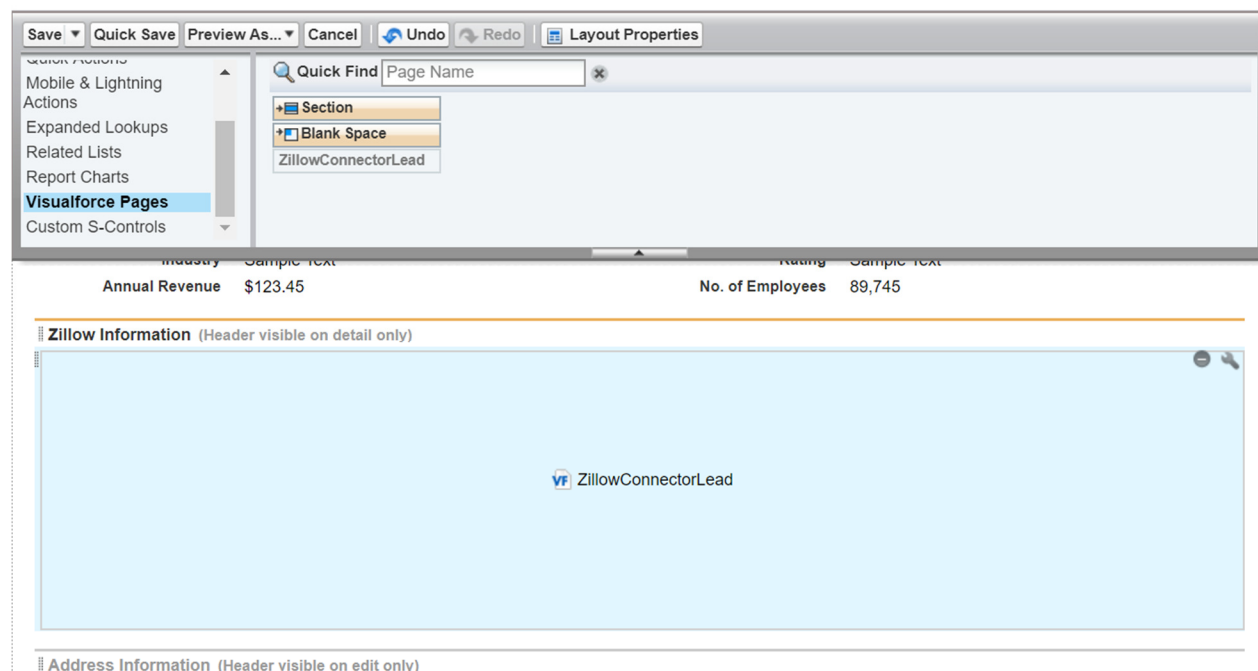
Action	Page Layout Name	Created By	Modified By
Edit Del	Lead (Marketing) Layout	Jeff Davis, 1/10/2019 5:23 PM	Jeff Davis, 1/10/2019 5:23 PM
Edit Del	Lead (Sales) Layout	Jeff Davis, 1/10/2019 5:23 PM	Jeff Davis, 1/10/2019 5:23 PM
Edit Del	Lead (Support) Layout	Jeff Davis, 1/10/2019 5:23 PM	Jeff Davis, 1/10/2019 5:23 PM
Edit Del	Lead Layout	Jeff Davis, 1/10/2019 5:23 PM	Jeff Davis, 1/23/2019 12:54 PM

For the purposes of the demo we will select the default “Lead Layout” and click **Edit**

Scroll to where on the page you want to add the Zillow Information, select Visualforce Pages and drag-and-drop a new Section that is **1-Column** wide. Enter a header like “Zillow Information”. If you have a 1-Column section already where you want to place the Connector you can skip this step.



Now drag and drop the Zillow® Visualforce Page within the section you just created. Then **Click Save**.

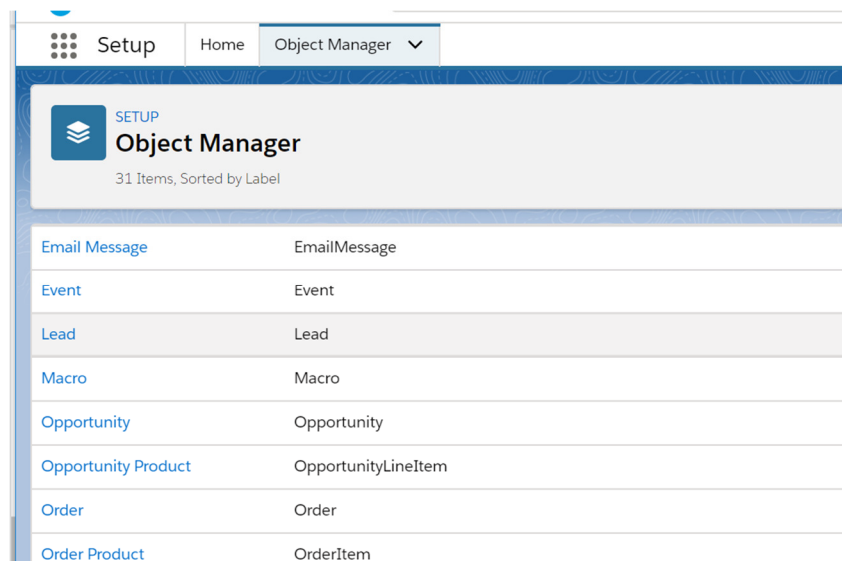


Now every time you navigate to a Lead detail page, the Zillow® Connector will pull the Zillow® Zestimate® for that address along with other information. And you're done!

You can repeat the same process for the Account or Contact or Opportunity page layouts. If you would like to use the Zillow® Connector for another standard or custom object in your instance please contact FirmCloud (info@firmcloud.com)

To add the Connector to Salesforce Lightning view

Go to **Setup->Object Manager**. Select the object (Lead, Account, Contact or Opportunity) in your instance where you would like to add the Zillow® Information section.



For the purposes of the demo we will select the “**Lead**” object

Click **Lightning Record Pages** from the options on the left. Select the record page in your instance where you would like to add the Zillow® Information section. This could be one you already created or you can create a New one if one does not exist yet.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar lists various setup options, with 'Lightning Record Pages' selected. The main content area displays 'Lightning Record Pages' for the 'Lead' object, showing 1 item sorted by label. A table lists the record page details.

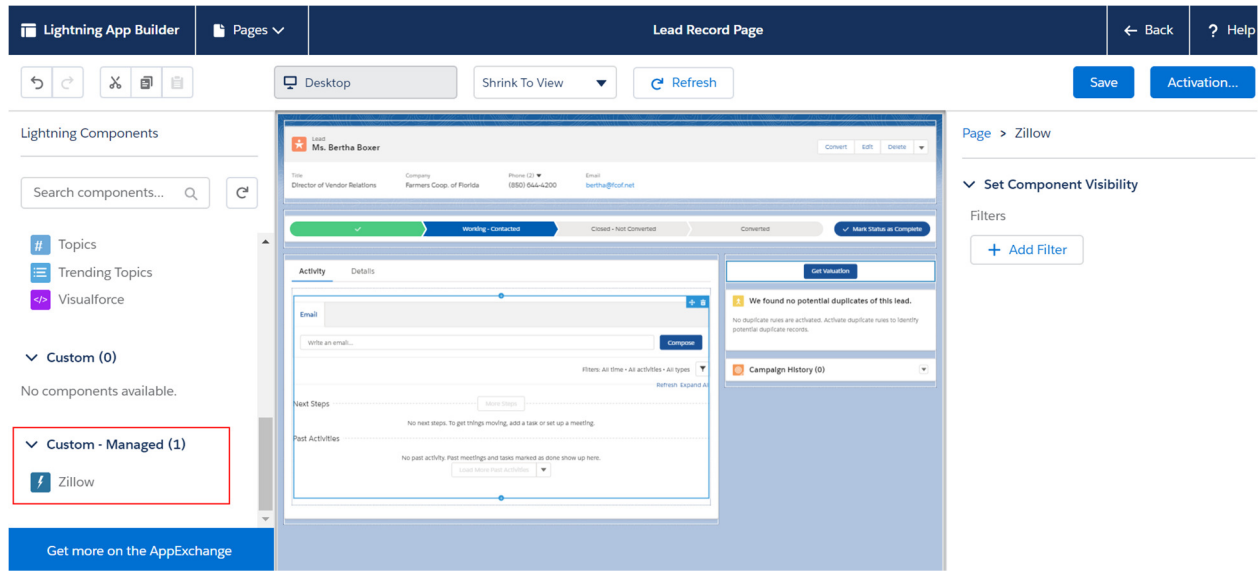
LABEL	ORG DEFAULT	APP DEFAULT	OTHER ASSIGNME...	MODIFIED BY
Lead Record Page	✓	0	0	Jeff Davis, 1/23/2019, 12:52 PM

For the purposes of the demo we will select the “**Lead Record Page**”

Click “**Edit**” on the screen that appears

The screenshot shows the 'Lightning Page Detail' for the 'Lead_Record_Page'. The left sidebar is the same as the previous screenshot. The main content area shows the 'Information' section with fields for 'Name' (Lead_Record_Page) and 'Description'. Below this are sections for 'Assignments By App' and 'Assignments By App, Record Type, and Profile', both showing 'No Assignments to display'.

On the left sidebar of the Lightning App Builder is a Custom – Managed lightning component you can drag and drop anywhere on your page. Click **Save**. Note: if you have not set a record page as an Org Default then you will need to click **Activation...** and set this page as the Org Default if you want the connector to appear.



Now every time you navigate to a Lead record detail page, the Zillow® Connector will pull the Zillow® Zestimate® for that address along with other information. And you're done!

You can repeat the same process for the Account or Contact or Opportunity lightning record pages. If you would like to use the Zillow® Connector for another standard or custom object in your instance please contact FirmCloud (info@firmcloud.com)