



LendingTree Salesforce App (LMS)

Best Practice Guide

December, 2019



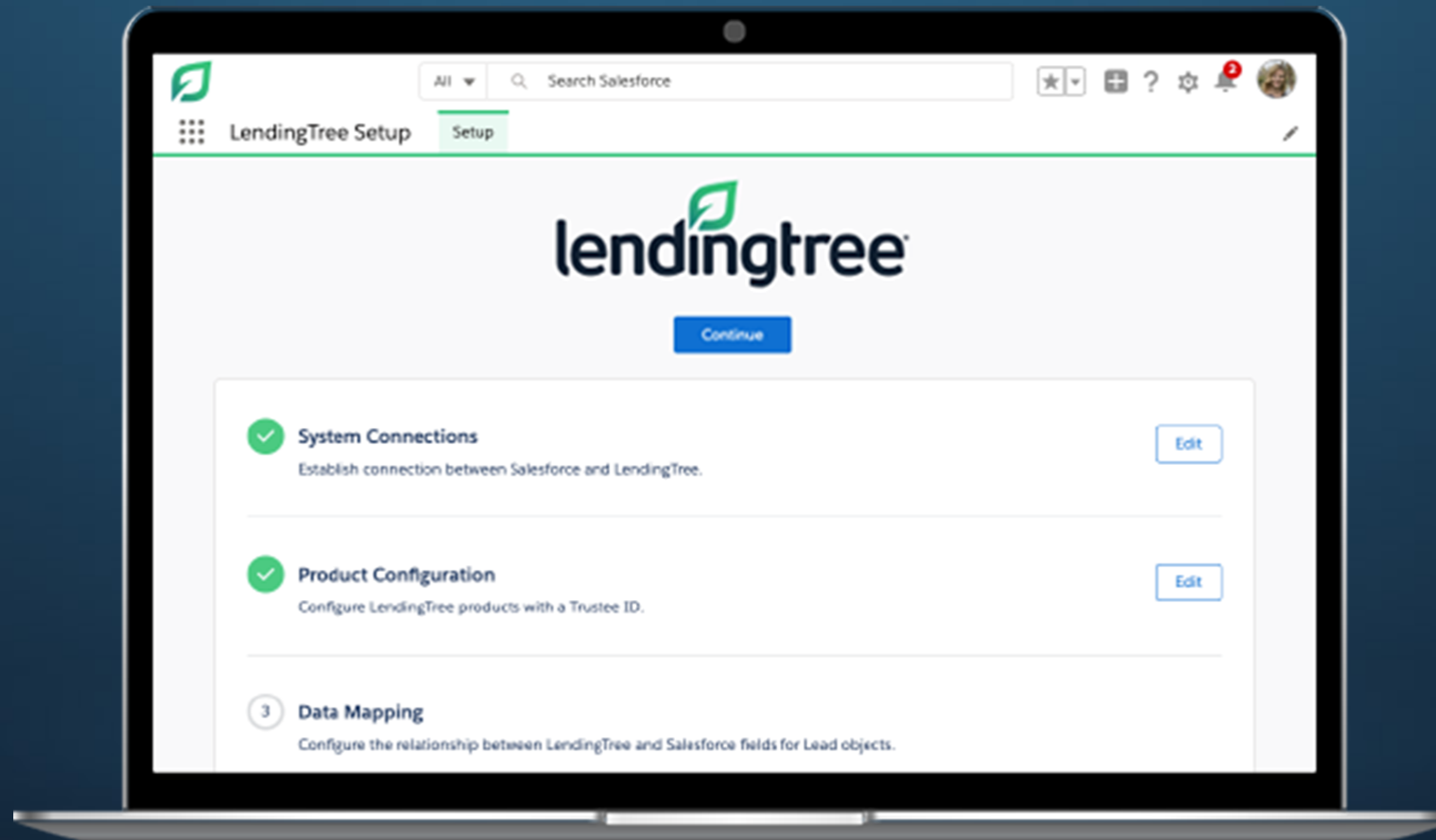
Agenda

- App Overview
- Steps to take before downloading
- Appendix
 - Screenshots

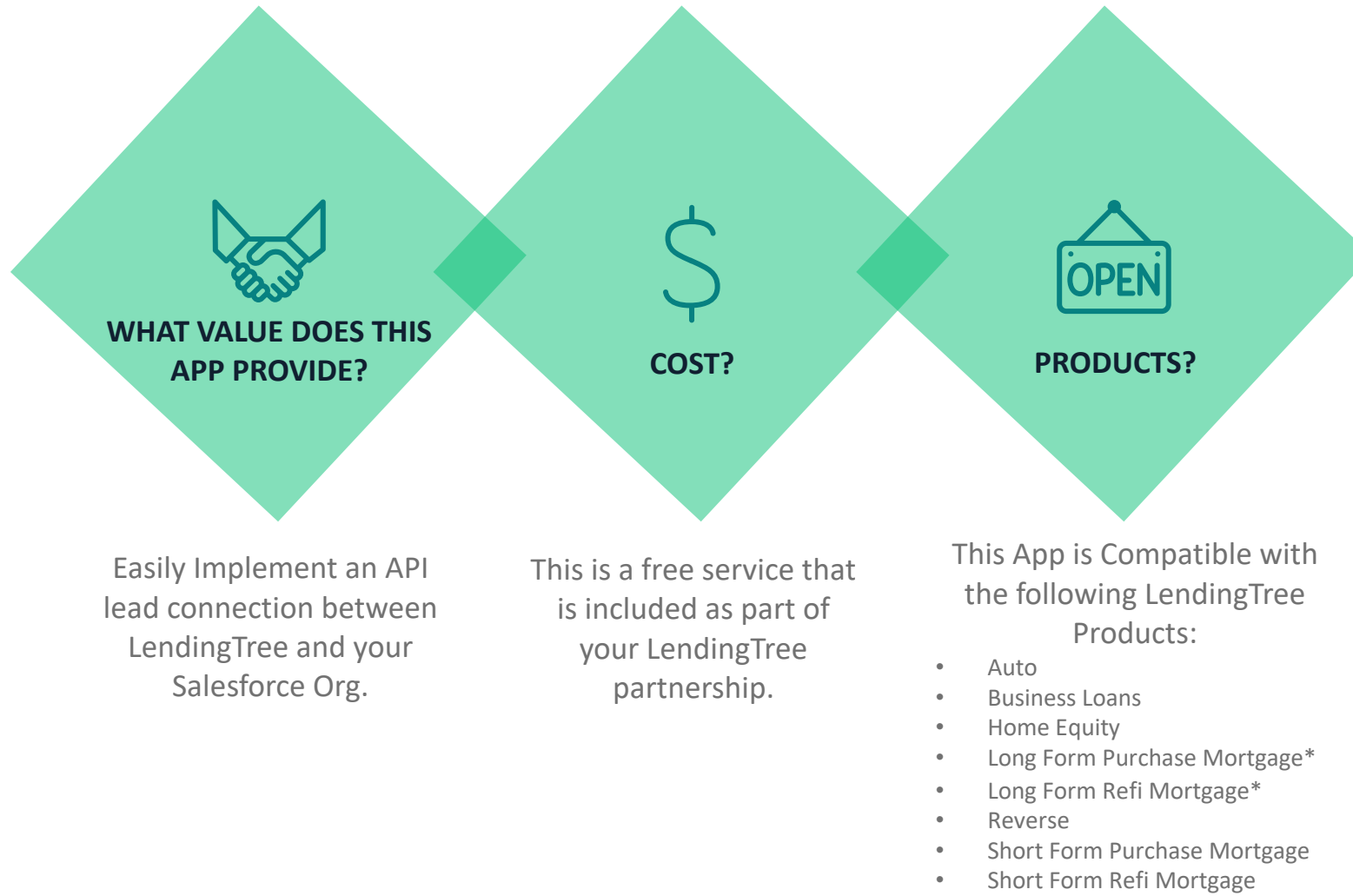


lendingtree® | for Salesforce

Integrate seamlessly with LendingTree to receive Finance leads!



App Overview



*These products may require a relationship with a pricing engine. Please speak to your primary contact for current requirements.

Steps to take before downloading...



An agreement with Salesforce & access to a Salesforce Org

Your agreement with Salesforce will need to include access to Sales Cloud or Service Cloud. You will need to have a standard Lead process available.



An agreement with LendingTree to purchase the financial products of your choosing

Your LendingTree contact will help explain the differences in the LendingTree financial products and assist with the required agreements/onboarding steps.



Custom LendingTree Lead Record Type

We recommend creating a lead record type for the LendingTree leads. You will need to add all fields that are provided for each product.



Administrator Rights for your Salesforce Org

While this Application requires zero development, we recommend that your Salesforce Org has an administrator or power user that can access the Leads object and make configurations and mapping changes.

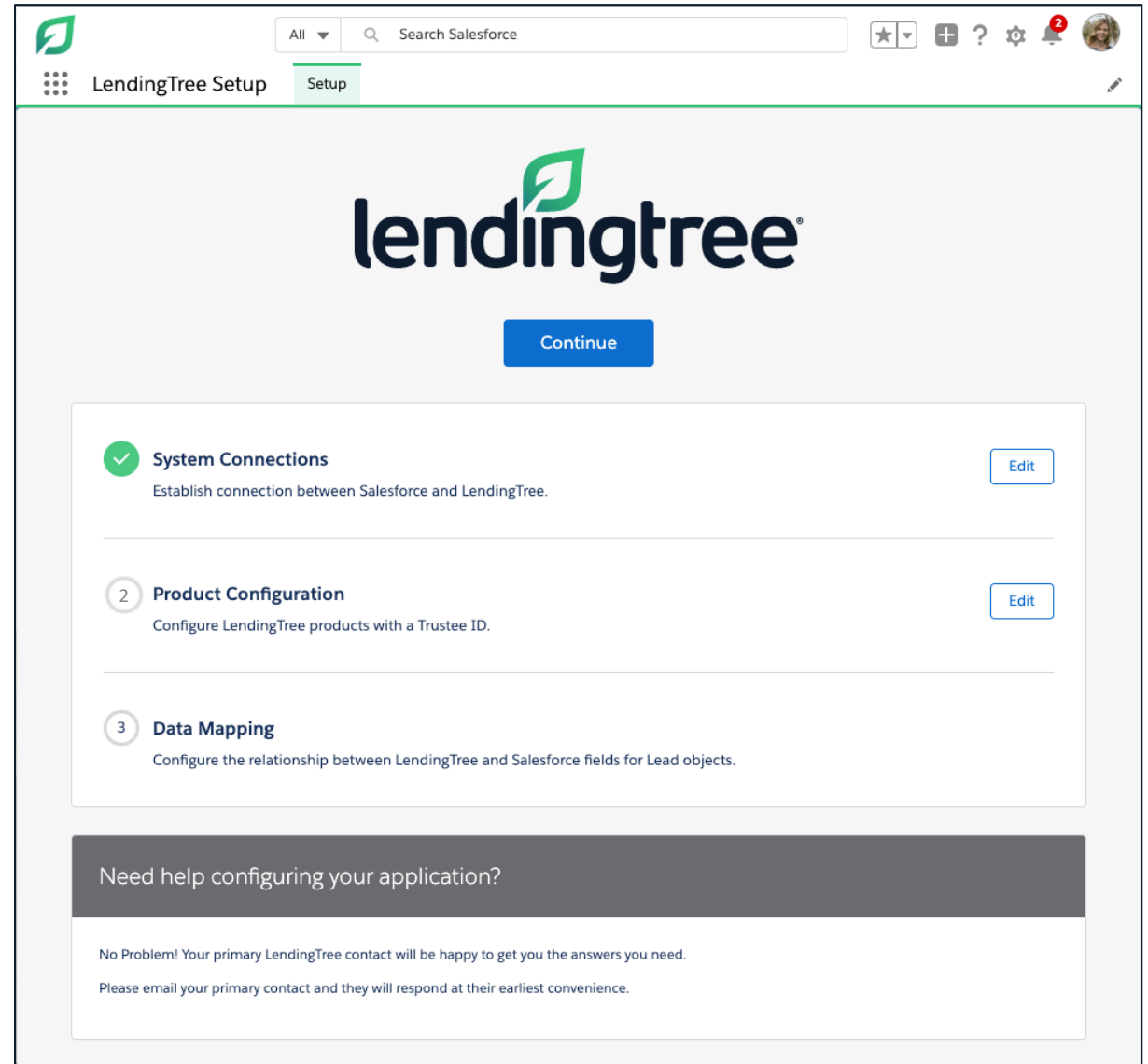


Appendix



App Screenshot: Step 1

Home Page of the App



App Screenshot: Step 2

- In this step you will enter an “API Key” provided by LendingTree to establish the LendingTree lead connection.
- After clicking “Next” you will establish the inbound connection with your Salesforce Org.
- Connection Details:
 - Inbound: This connection establishes a link to your salesforce org & identifies the org we will post leLendingTree does not have the ability to access your org without further permission.
 - Outbound: This connection

The screenshot displays the 'LendingTree Setup' interface within a Salesforce environment. The top navigation bar includes the Salesforce logo, a search bar, and user profile icons. Below this, the 'LendingTree Setup' header is visible, with a 'Setup' tab selected. The main content area is titled 'System Connections' and features two tabs: 'Establish Outbound Connection' (active) and 'Establish Inbound Connection'. The 'Establish Outbound Connection' section shows a green bar with a checkmark and the text 'Connected'. Below this, there is a field for the 'API Key' (marked with an asterisk) containing several asterisks. To the right of the API key field is a 'Reauthorize' button. At the bottom of the section are 'Cancel' and 'Next' buttons. A 'Guidance' sidebar on the right provides instructions: 'Enter your LendingTree API Key into the field provided to establish outbound connection.'

App Screenshot: Step 3

- In this step you will enter the LendingTree Products you've agreed to purchase as well as the corresponding LendingTree Trustee ID. This will be provided by the LendingTree sales operations team.

LendingTree Setup **Setup**

SETUP
Product Configuration

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

LENDINGTREE PRODUCTS	LENDINGTREE TRUSTEE ID	REMOVE
Auto	789654123	
Long Form Purchase Mo...	987654321	
Reverse Mortgage	098765432	
Short Form Refinance M...	123456789	
--- Select an option ---		

Auto
Business Loan Resource
Home Equity
Long Form Purchase Mort...
Long Form Refinance Mort...

Finish

Guidance
Select your LendingTree product and then type in the corresponding Trustee ID.

Click the **Add Product** button to add more LendingTree Product configurations.

App Screenshot: Step 4

- In this step, you will select each product entered in step 3 and select a field mapping. The “LendingTree Field” column shows all lead fields that will map through the API connection. In the “Salesforce Lead Field” you will select which lead field within your org you would like to map to.

The screenshot displays the LendingTree Setup interface with a modal window titled "Product Field Mapping". The modal is overlaid on a background showing the "Product Selection and Mapping" section, which currently has no products configured. The modal contains a dropdown menu to "Select a LendingTree Product", which is set to "Long Form Purchase Mortgage". Below this is a table for mapping fields.

LENDINGTREE FIELD	SALESFORCE LEAD FIELD	
RequestAssignmentDate		
ContactAddress	Street	
ContactCity	City	
ContactState	State/Province	
ContactZip		
EmailAddress	Email	
ContactPhone	Phone	
ConsumerGeoPhoneAreaCode		
ConsumerGeoPhoneCountryCode		
FirstName	First Name	
LastName	Last Name	

At the bottom of the modal are "Cancel" and "Save" buttons.



Thanks