LendingTree Salesforce App (LMS)

Best Practice Guide

December, 2019

Agenda

- App Overview
- Steps to take before downloading
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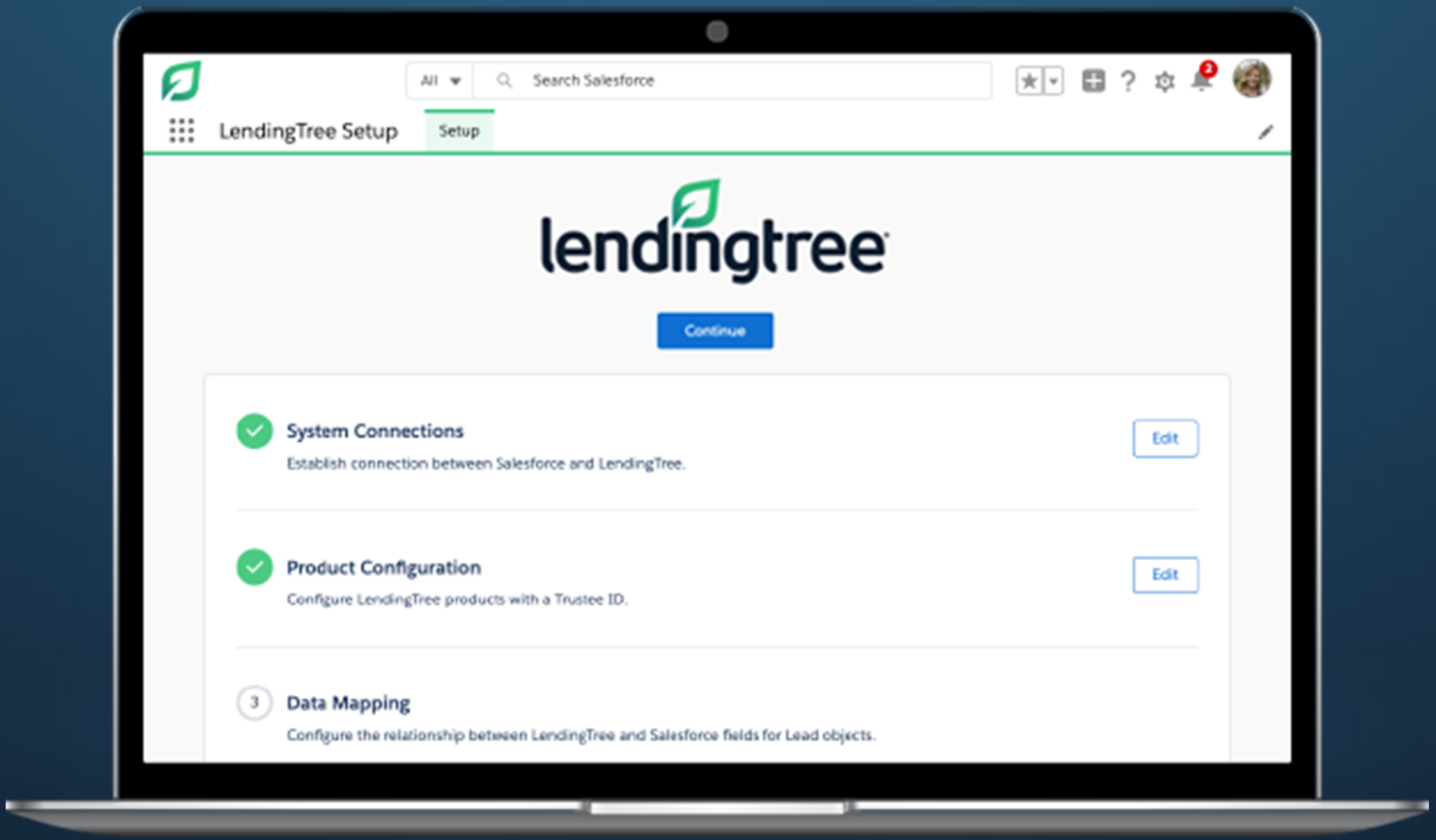
lendingtree | for Salesforce

Integrate seamlessly with LendingTree to receive Finance leads!



App Overview

WHAT VALUE DOES THIS APP PROVIDE?

Easily Implement an API lead connection between LendingTree and your Salesforce Org.

COST?

This is a free service that is included as part of your LendingTree partnership.

PRODUCTS?

This App is Compatible with the following LendingTree Products:

- Auto
- Business Loans
- Home Equity
- Long Form Purchase Mortgage*
- Long Form Refi Mortgage*
- Reverse
- Short Form Purchase Mortgage
- Short Form Refi Mortgage

*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.

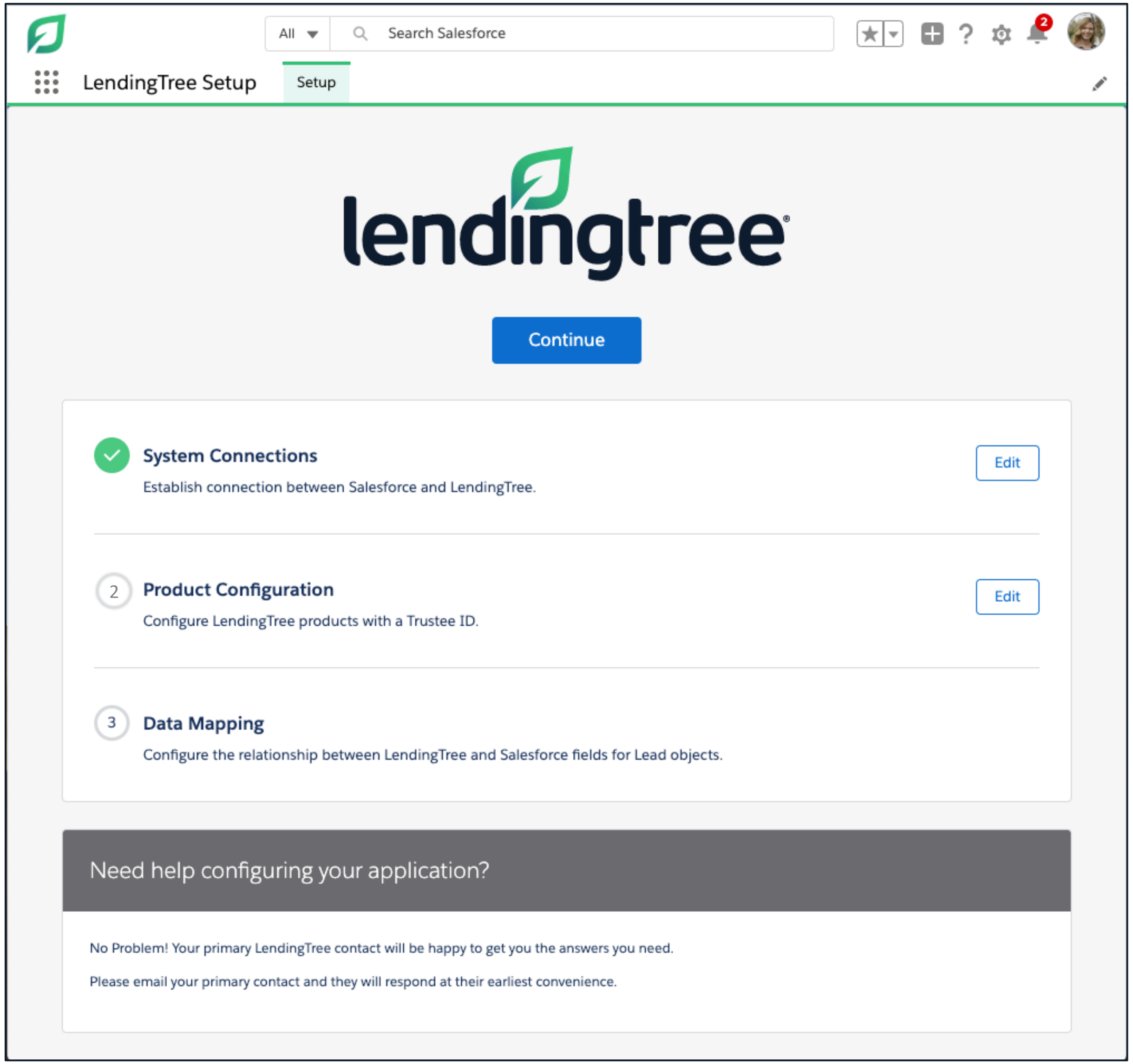
Administrator Rights for your Salesforce Org

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

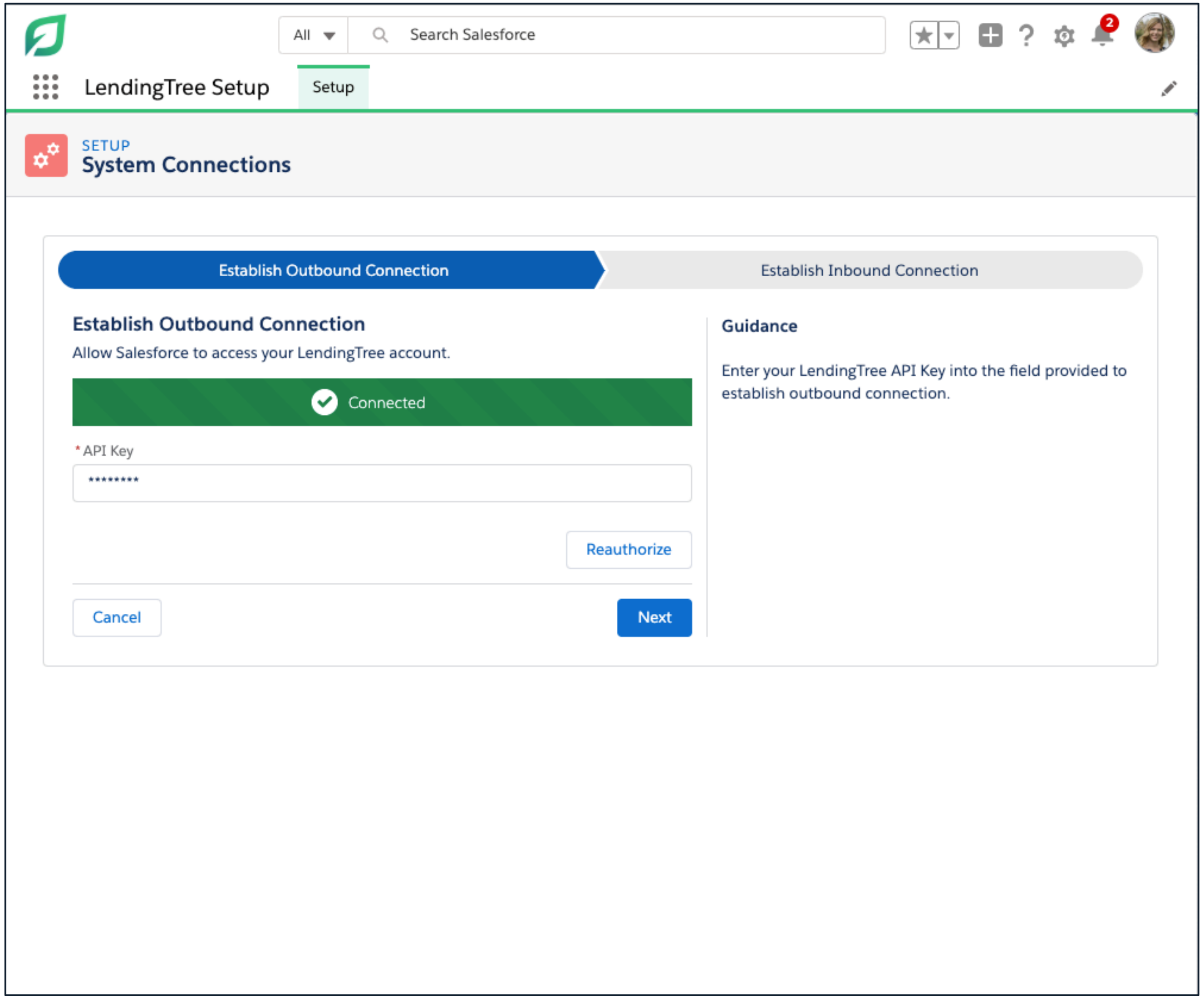
App Screenshot: Step 1

Home Page of the App



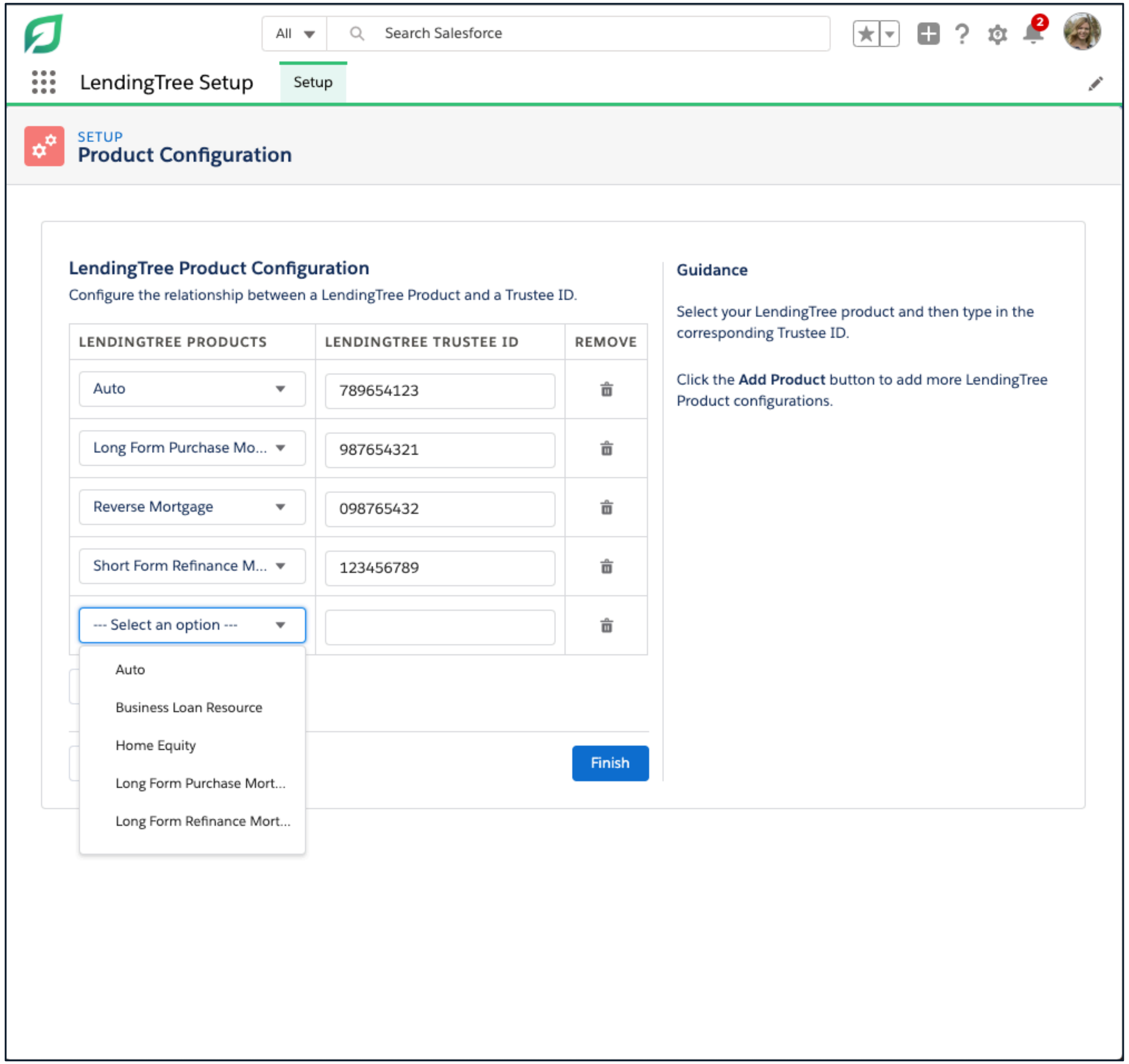
App Screenshot: Step 2

- 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



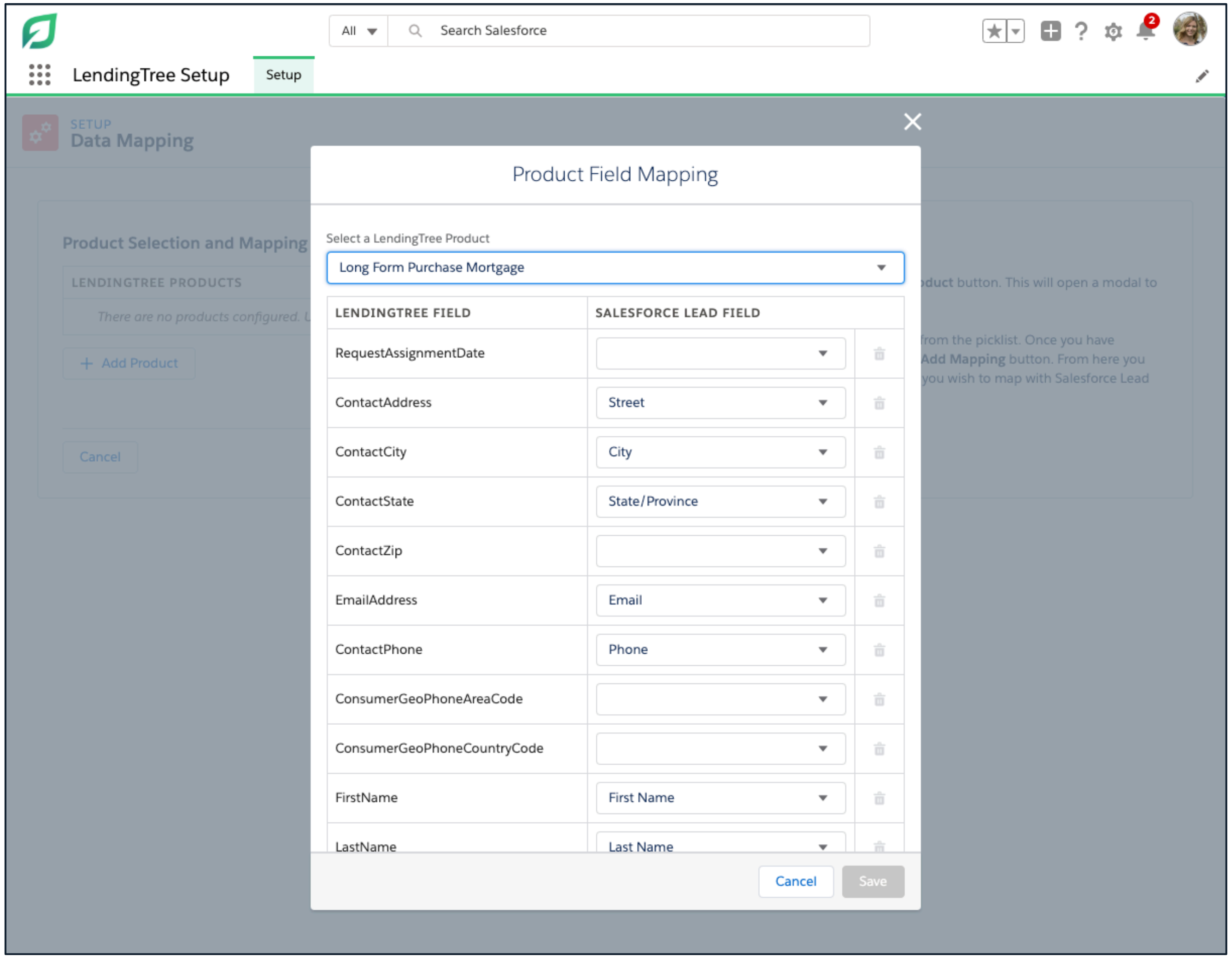
App Screenshot: Step 3

- 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.



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.



Thanks