Salesforce Installation Guide

Table of Contents

What's New? Version 5.0 Release Notes	1
Introduction	2
Installation	2
Installing the Total Expert Package	2
Permission Sets	3
Identity Provider	7
Configure Your SSO	8
Setup Assistant	9
Total Expert Setup Assistant	9
System Connections	10
Data Mapping	12
Asynchronous Transactions	28
Package Log Management	29
Outbound Sync	31
Engagement Webhook Subscription	32
Lightning Components	
Troubleshooting	
Error Log	
User Access Token Refresh	40

What's New? Version 5.0 Release Notes

This section serves to inform you of what has been added in the 5.0 version of the Total Expert app in Salesforce.

Full Participant Payload for Loan and Account Syncing

In the past, when a loan or account entity sync occurred, the participant data only included the mapped name, email, phone number, and address details from the contact entity mapping. Now, all fields that are mapped in the contact entity will sync as a participant, including custom fields and contact groups.

Expanded Salesforce Lookup Field Mapping Configuration

When mapping Salesforce lookup fields from an object, users can select fields from the related object so data within them can sync to Total Expert as 1 post.

Introduction

This document serves as the configuration guide for the Total Expert Salesforce app. A Salesforce administrator or a user with the appropriate permissions will be able to complete each of the following installation and configuration settings with limited resources needed from a Salesforce developer.

The first section covers the initial Salesforce configuration for the Total Expert managed application, including installation and configuration of the data mapping between Total Expert and Salesforce. The following section walks you through applying permission sets and completing the Setup Assistant. The final section covers the Total Expert troubleshooting tools.

This guide is meant to walk a Salesforce administrator through configuring your organization in a Lightning Experience environment.

Throughout this guide, you will be instructed to navigate through Setup. To do so, click the gear icon in the upperright corner and select **Setup**. Once in Setup, you can use the Quick Find box to find and navigate to the appropriate section.

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~	Leads 🗸 Tasks 🗸 Files Accounts 🗸 Contacts 🗸 Campaigns 🗸 Dashboards 🗸 Reports 🗸 Group	Setup 🗗 re 🔻
1113	As of Today 7:06:05 AM C 🗃 👻 Assistant Devel	oper Console
and a	Nothing needs your attention i Edit P	age r.

Installation

Installing the Total Expert Package

Navigate to the Salesforce AppExchange and search for Total Expert, or navigate to the listing <u>here</u>. Click the **Get It Now** button. If you are not already logged in to the Salesforce organization you want 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, <u>click here</u> to refer to Salesforce documentation on Package Installations.



Approve Third-Party Access – Check the box and select **Continue** to start the package installation when the modal appears. As it states, this is to allow data to be sent back and forth between your Salesforce organization and Total Expert.

Permission Sets

The Total Expert application provides 3 permission sets:

- **Total Expert Site User** This is intended for the guest site user and the site content user when leveraging the webhook subscription.
- **Total Expert Standard User** This enables a Salesforce user to navigate to the Total Expert Marketing page (iframe into Total Expert) and access to the Total Expert Lightning Web Component to view engagement and insight activities on a Salesforce record.
- **Total Expert Setup Admin User** This allows a Salesforce user to navigate to the Total Expert Setup Assistant and perform configuration actions.

The Total Expert Site User must be assigned to the public site guest user to subscribe to the Total Expert engagements.

Create a Site

1. Click the **Register My Salesforce Site Domain** button.

Setup Home Object	tt Manager 🗸
Q Sites	SETUP Sites
 Sites and Domains Custom URLs 	Sites Help for this Page 🥝
Domains	What is a Site?
Sites Security CSP Trusted Sites Didn't find what you're looking for? Try using Global Search.	Satisfore sites enables you to create public websites and applications that are directly integrated with your Satisfore.com organization—without requiring users to gain with a username and password. You can public you company's brand. Use sites to create public community sites to gather customer feedback, branded login and customer sees your site through your unique Satesfore domain and URL, or you can register your own branded domain or subdomain to create one site to read availation on collected information is performed automatically. You can register your own branded domain or subdomain to create one site for new developers, another for outsomers, and a third register your own parts (be for provide). The fore community site is a state of the satesfore and satisfy your company's various business needs. For example, a software company could create one site for new developers, another for outsomers, and a third reference and satisfy your company's various business needs. For example, a software company could create one site for new developers, another for outsomers, and a third reference and satisfy your company's various business needs. For example, a software company could create one site for new developers, another for outsomers, and a third reference and satisfy your company's various business needs. For example, a software company could create one site for new developers, another for outsomers, and a third reference and satisfy your company's various business needs. For example, a software company could create one site for new developers, another for outsomers, by company fore.com/example//e

2. Click the **New** button.

ites (totalexperttest.force.com)	1	New				
ite Label 💠	Site URL	Site Description	Active	Site Type	Last Modified By	
o records to display.						

- 3. Enter a **Site Label** and a **Site Name**.
- 4. Select an Active Site Home Page.
- 5. Click the **Save** button.
- 6. Activate the site.

Setup Home Objec	t Manager 🗸		
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Sites	New Site	Save Cancel	
✓ Security	Site Label	Total Expert	
CSP Trusted Sites	Site Name	Total Expert	
Cor musicu onco	Site Description		
Didn't find what you're looking for? Try using Global Search.			
	Site Contact	Matthew Kurnyta	
	Default Record Owner	Matthew Kurnyta	
	Default Web Address	http://totalexperttest.force.com/	
	Active		
	Active Site Home Page	AnswersHome	
	Inactive Site Home Page	InMaintenance	
	Site Template	SiteTemplate	
	Site Robots.txt		
	Site Favorite Icon		
	Analytics Tracking Code		
	URL Rewriter Class	43 i	
	Enable Feeds		
1	Clickjack Protection Level	Allow framing by the same origin only (Recommended)	

7. Click the **Public Access Settings** button.

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Multi-Factor Authentication Assistant	t						Help for this Page 🥝
Release Updates	25						
Lightning Experience Transition Assistant Site Detail			Edit Public Acce	ss Settings Login Settings	URL Redirects Deactivate		
New Salesforce Mobile App QuickStart	Site Description	TotalExpert			Site Name Site Contact	TotalExpert Matthew Kurnyta	
Lightning Lisage	Active	5			Login	Not Allowed	
A	tive Site Home Page	AnswersHome [Preview]			Site Favorite Icon		
Optimizer Ina	tive Site Home Page	InMaintenance [Preview]			Site Robots.txt		
Manage Subscription	Site Template	SiteTemplate [Preview]			Enable Feeds		
Ana	lytics Tracking Code				URL Rewriter Class		
ADMINISTRATION Click	ack Protection Level	Allow framing by the same	origin only (Recomm	ended) Rec	uire Secure Connections (HTTPS)	✓ <u>1</u>	
✓ Users Lightning Feat	ures for Guest Users	1			Upgrade all requests to HTTPS	1	
Permission Set Groups Enable Conter	t Sniffing Protection	✓ 1		En	able Browser Cross Site Scripting Protection	 ✓ 1 	
Permission Sets	errer URL Protection	✓ <u>i</u>			Quest Access to the Payments API	i	
Guest Accer	s to the Support API	1			Default Record Owner	Matthew Kurnyta	
Profiles Public Groups	Last Modified By	Matthew Kurnyta, 4/6/2021	1 12:17 PM		Created By	Matthew Kurnyta, 4/6/2021 12:15	PM
Queues			Edit Public Acce	ss Settings Login Settings	URL Redirects Deactivate		
Roles							
User Management Settings Custom URLs			New Custom URL				Custom URLs Help 🕐
Users Action	1	Domain Name	Path	Current HTTPS Option	Certificate and Key	Certificate Expiration Date	Site Primary Custom URL
> Data	Preview as Admin	otalexperttest.force.com	/	No HTTPS			

8. Click the **View Users** button.

	Enabled Custom Setting Definitions Access (9)	I Enabled Flow Access [0] I Enabled Custom Permit	ssions (0)
Profile Detail	Edit View Users		
Nan	TotalExpert Profile		
User Licens	Guest User License	Custom Profile	✓
Descriptio	n		
Created E	Matthew Kurnyta, 4/6/2021, 12:15 PM	Modified By	Matthew Kurnyta, 4/6/2021, 12:15 PM
Nan User Licen Descriptic Created E	TotalExpert Profile Guest User License Matthew Kurnyta, 4/6/2021, 12:15 PM	Custom Profile Modified By	Matthew Kurryta, 4/6/2021, 12:15 PM

9. Click the username.

fotall	Expert Profile									H	Help for this	Page 🕜
n this pa	age you can create, view, and mana	age users.										
1 addition	n, download SalesforceA to view an	d edit user details	, reset passwords, and perform other administrativ	re tasks fr	rom your mobile d	evices: iO	S Android					
				ABC	D E F G H	I J K L	MNO	PQR	S T U	v w >	(Y Z C	ther A
Action	Full Name 🕈	Alias	Username	A B C	D E F G H	I J K L Role	M N O	P Q R	S T U	v w >	K Y Z C Manage	ther A

10. Next to the Permission Set Assignments heading, click the **Edit Assignments** button.

Setup Home Object	Manager 🗸	MAN 10121 - 1945-2111 - 1244 11122		ANNA THERE ADDRESSED FRANK THERE
Q Quick Find	SETUP			
Setup Home	Users			
Service Setup Assistant	User			11/
Marki Factor & theretication Assistant	TotalExpert Site Guest	User		Help for this Page 🥩
Multi-Factor Authentication Assistant	Permission Set Assignments (0) Pe	mission Set Assignments: Activation Required [0]	Permission Set Group Assignments [0] 1 Permission Set License Ass	ignments (0) Public Group Membership (0) Queue Membership (0)
Release Updates			User Skills [0] Installed Mobile Apps [0]	
Lightning Experience Transition	Usor Detail	Edit Charles		
Assistant	User Detail	Eur		2
	Name	TotalExpert Site Guest User	User License	Guest License
New Salesforce Mobile App QuickStart	Email	stanley@appiphony.com	Active	
Lightning Usage	Username	totalexpert@totalexperttest force com	Marketing User	4
Ontimizer	Nickname		Mobile Push Registrations	View
	Division	TotalExpert	Salasforce CPM Content Liser	
Manage Subscription	Time Tene	(ONT: 00:00) Organish Marrie Time (ONT)	Empli Encoder	Union de CETE DA
ADMINISTRATION	Locale	(GMT+00:00) Greenwich Mean Time (GMT) English (United States)	Email Encoding	Unicode (UTF-8)
ADMINISTRATION	Language	English		
✓ Users	Federation ID			
Permission Set Groups	App Registration: One-Time Password Authenticator	1		
Permission Sets	App Registration: Salesforce Authenticator	1	Used Data Space	0 B [View]
Profiles	Security Key (U2F)	1	Used File Space	0 B [View]
Fiolities	Lightning Login	i	Individual	
Public Groups	Temporary Verification Code (Expires in 1 to 24 Hours)	[Generate]		
Queues	Created By	Matthew Kurnyta, 4/6/2021, 12:15 PM	Modified By	Matthew Kurnyta, 4/6/2021, 12:17 PM
Roles		Edit Sharing		
User Management Settings				
Users	Permission Set Assignments	Edit Assignments		Permission Set Assignments Help (?)
> Data	No recordo to display			TI J

- 11. Add the Total Expert Site User permission set.
- 12. Click the **Save** button.

SETUP Permission Sets	9871 (7777-54677-5467) (7777-54677-54677) 1987 (7777-54677-54677)	979-9798-9798-9799-9799-9799-9799-9799-
Permission Set Assignments TotalExpert Site Guest User	$(\bigcirc) \land \land \land \lor \bigcirc \land \land \land \circ \bigcirc \land \land \circ \lor \circ \land \circ \circ$	Help for this Page 🥹
	Save	
Available Permission Sets Rebate Management User Salesforce CMS Integration Admin Salesforce Console User Standard Einstein Activity Capture Tableau CRM Pitorm Admin Tableau CRM Pitorm User Tableau CRM Pius Admin Tableau CRM Pius User Total Expert Standard User Trust Card Manager	Add Remove	
	Save Cancel	

You must assign the Total Expert Standard User to any user that will be interacting with the Total Expert Activity component.

- 1. In Setup, search for Permission Sets.
- 2. Select the Total Expert Standard User.

Setup Home Object Manager 🗸			THE PERSON AND STREET, STRE
Q. Permission Sets	Permission Sets		Shini — Akisələr Azər Akisələr Konsəlində
Permission Sets			
Permi	ssion Sets		Help for this Page 🧐
Didn't find what you're looking for?	in you can create yiow and manage permission estr		
Try using Global Search.	e you can create, view, and manage permission sets	S.	
In addition,	you can use the SalesforceA mobile app to assign p	ermission sets to a user. Download SalesforceA from the App Store or Google Play	: iOS I Android
	It Delete Create New View		
	T Delete T Create New View		8
New	3	A B C D E F G H I J K	
Action	Permission Set Label *	Description	License
Clone	Tableau CRM Platform Admin	Create and customize Tableau CRM apps, dashboards, datasets a	Analytics Platform
Clone	Tableau CRM Platform User	View Tableau CRM apps and dashboards.	Analytics Platform
Clone	Tableau CRM Plus Admin	Access to all features enabled by Tableau CRM Plus license	Tableau CRM Plus
Clone	Tableau CRM Plus User	Access to read only features enabled by Tableau CRM Plus license	Tableau CRM Plus
Clone	Total Expert Site User	Assign permission for the public site guest user.	
Clone	Total Expert Standard User	Enables the user to view Engagement activities.	
26-31 of 31	■ 0 Selected ■	I I Previous Next ► III	Page 2 of 2

3. Click the Manage Assignments button.

Permission Sets			
Permission Set Total Expert Standard I	USEr		Video Tutorial I Help for this Page 🥹
Permission Set Overview			
Description	Enables the user to view Engagement activities.	API Name	Total_Expert_Standard_User
License		Namespace Prefix	totalexpert
Session Activation Required		Created By	Matthew Kurnyta, 4/6/2021, 9:22 AM
Last Modified By	Matthew Kurnyta, 4/6/2021, 9:46 AM		

4. Click the **Add Assignments** button.

Assigned Users Total Expert Standar « Back to: Permission Set	rd User																				н	elp fo	r this F	°age	0
					A	В	D	EF	G	н∣т	Jŀ	L	Μ	NC	P	Q	RS	₿∣т	U	۷IV	v x	Y	z o	ther	All
		Add Assignments	s Remov	e Assignments																					
Full Name 🛧	Alias	Username		Last Login			Ro	ole		A	ctive				Prof	ile				Mana	iger				
No records to display.																									4
		Add Assignments	Remove	Assignments																					

5. Assign to users.

SETUP Permission Set	s						
Assign Users Admin Users View: Admin Users V Edit Greate	e New View		A B C	DEFGHII	I K L M N	OPQRST	Help for this Page 🥝
Action Full Name †	Alias	Assign Cancel Username	Last Login	Role	Active	Profile	Manager
Edit <u>Kurnyta, Matthew</u>	<u>MKurn</u>	Assign Cancel	4/6/2021, 12:53 F	M	1	System Administrate	201

Identity Provider

Identity Provider must be enabled to access SAML login information.

- 1. Navigate to **Setup**.
- 2. Search for identity provider.



3. Click the Enable Identity Provider button.



Configure Your SSO

Note

This section is only required if Salesforce is your identity provider.

Total Expert will provide an ACS URL if your identity provider is not already configured to have Total Expert as a service provider.

- 1. Navigate to Setup.
- 2. Search for app manager.
- 3. Select App Manager.



4. Locate the Total Expert SSO option and select Manage from the pop-up menu.

530		0		1913a at at attain 24	0 0	- 20 	0
19	Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-drop Site.com	3/22/2021, 8:10 AM	Classic		7
20	Total Expert Setup	Setup	Manage your Total Expert integration.	4/6/2021, 11:07 AM	Lightning	Manage	
21	Total Expert SSO	Total_Expert_SSO	Manage your SSO policies for Total Expert	4/6/2021, 11:06 AM	Connected		

5. Click the Edit Policies button.

App Manager		
Connected App Total Expert SSO * Back to List: 1P Whitelist Connected App Detail	Edit Policies Uninstall Version 1 Description Manage your SSO policies for Total Expert	🖨 Help for this Page 🥑

6. Update the **ACS URL** field with the ACS URL provided by Total Expert.

SAML Service Provider Settings	ι.		
Entity Id	https://totalexpert.net	ACS URL	https://insert-acs-url-here
Subject Type	Custom Attribute 🗸 i	Name ID Format	urn:oasis:names:tc:SAML:1.1:nameid-format:emailAddress
Custom Attribute	TE User Email 🗸 👔	Issuer	i
Verify Request Signatures		Idp Certificate	Default IdP Certificate 🗸 i
Enable Single Logout			

7. Click the **Save** button.

Setup Assistant

Total Expert Setup Assistant

The Total Expert Setup Assistant guides you to complete the Total Expert configuration.

1. To start System Connections, navigate to the App Launcher and select **Total Expert Setup Assistant**.

	Q Search	h				EPT: 2.5 s 354.22 KB ★ 💌 🕂)? 尊	* 🐻
 App Launcher	(Q နိearch ap	ips or items)	Visit AppE	xchange	
✓ All Apps								^
Sales Manage your sales process with accounts, leads, opportunities, and mo	en e	۵	Total Expert Setup Assistant Manage your Total Expert integration.	**	Ŗ	Service Manage customer service with accounts, contacts, cases, and more	* * * * * *	
Marketing Best-in-class on-demand marketing automation	**	4	Salesforce Chatter The Salesforce Chatter social network, including profiles and feeds	**	sc	Service Cloud Console	8 8 8 8 8 8 8 8	
CA Chatter Answers Moderator	** ** *		Digital Experiences Manage content and media for all of your sites.		(Bolt Solutions Discover and manage business solutions designed for your industry.	** ** **	
Your Account Add products and licenses, and review subscription details.	, 11							B
✓ All Items								
Account Brands C	ontacts		Individuals			Quick Text		
Accounts C	ontracts		Insight Activites			Recommendations		-

2. Click the **Get Started** button.

۲	Q, Search		* -	8	\$?	¢	Ļ	6
	Total Expert Setup Setup Package Logs V							
	4							
	TotalExper	ť						
	Package Version: 3.9							
	Export Job Next Run: Not Activated Overseer Job Next Run: Not Activated							
	Get Started							
	1 System Connections							
	Gain access to Total Expert and configure your Total Expert Iframe.							
	2 Total Expert Data Manning							
	Determine how your Total Expert data is reflected in Salesforce.							
	3 Asynchronous Apex Transaction Configuration							
	Set a value of how many asynchronous Apex transactions your org can make per day.							

System Connections

- 1. Fill in the **Client Id** and **Client Secret** fields using information obtained from your Total Expert representative.
- 2. Click the **Authorize** button.
- 3. Click the **Next** button.

System Connections	O•	×
	Outbound Connection	
	Connect your Salesforce org to Total Expert by providing your Client Id and Client Secret. Optionally, you can enable this app for use in a Salesforce sandbox for testing purposes.	
	In order to successfully connect, you must provide your Total Expert representative with the scope and grant types provided below.	
	😧 Not Connected	
	Client Id	
	Enter Client Id	Next >
	Client Secret	
	Enter Client Secret	
	Scope accountInteraction loanInteraction webhookInteraction leadInteraction getSchema crm	
	Grant Types authorization_code refresh_token	
	Would you like to enable the app for sandbox use?	

4. Contact your Total Expert representative to obtain the information needed to complete the Single Sign-On and Iframe Configuration page.

Note

Your service provider name must match what is configured with your identity provider. This name is provided by Total Expert at the time of your SSO configuration.

The iframe path is the default home page when navigating to the Total Expert Marketing object.

5. Click the **Finish** button.

SETUP System Connections	۰	c	þ	×
System Connections	Single Sign Below are instructions on how to setup Single S Service Provider Name Enter Service Provider Name Service Provider Name In the Salesforce as a your Identity If To enable your org as an identity provi Enable Identity Provider. Use the defi If your org is already enabled as an iden Service setting up your SSO configurati from Total Expert. Send Identity Provider Certificate I Salesforce Setup and click Downlo Salesforce Setup and click Downlo Selefore Setup and click Downlo Setup and click Downlo	On and Iframe Configurati gn-On for the Total Expert iframe. If you ne our Total Expert representative. Total Expert Iframe Path https://ct.totalexpert.net Provider der, navigate to Identity Provider in the Sale autt Self Signed Certificate provided by Sale intity provider, you can move on to the next in with Total Expert on in Salesforce, there is a list of items you to Total Expert - to obtain this certificate, go ad Certificate. Provide Total Expert with th ame - the service provide Total Expert with th are - the service provide to a list of items will be pro your SO configuration in the next section.	eed additional help, please contact /dashboard esforce Setup and click on esforce and click Save. t step. must send to and retrieve to to Identity Provider in the te.crt file you downloaded. ovided by Total Expert. This d will be needed to	× Finish ✓
	 Configure your SSO Once you've retrieved the requested it Navigate to App Manager in the Salest menu to the right, select Manage. Clic URI field with the ACS URI provided h 	ems from Total Expert, you are now ready t orce Setup and highlight the Total Expert S k on Edit Policies located at the top of the w Total Expert and rlick Save	to configure your SSO. SSO app. In the drop down page and update the ACS	

You are returned to the Total Expert Setup Assistant.

Data Mapping

1. Click the **Start** button.

Total Expert Setup	Setup Package Logs 🗸		ATAT
		î	
	TotalExpert		
	Package Version: 3.9 Export Job Next Run: Not Activated		
	Overseer Job Next Run: Not Activated		
System Connecti	ons	Edit	
Gain access to Total E	pert and configure your Total Expert Iframe.		
2 Total Expert Dat	n Mapping	Start	
Determine how your	otal Expert data is reflected in Salesforce.		
	nov Transaction Configuration		
Set a value of how ma	ny asynchronous Apex transactions your org can make per day.		
3 Asynchronous A Set a value of how ma	Dex Transaction Configuration ny asynchronous Apex transactions your org can make per day.		

2. Map the entities you are interested in (see the following subsections). Contact, lead, loan, and account entities each include data sync control by including the Sync with Total Expert mapping to a custom Boolean field. If that mapping is complete and a record in the corresponding object has the custom field value set to True, then the record will be mapped. If it is set to False, it will be ignored.

SETUP Total Expert Dat	a Mapping	×
	Total Expert Entity Mapping Define each Total Expert entity by creating mapping configurations so that the data in Salesforce is accurately represented when being shared with Total Expert. Contact your Total Expert representative for questions regarding best practices for entity mapping configurations.	
	REQUIRED MAPPING	
	Contact Entity	
C Back	User Entity	Finish 🗸
, sour	OPTIONAL MAPPING	
	Lead Entity	
	Loan Entity	
	Account Entity	

User Entity

Users in Total Expert are employees of your organization and are required to define the explicit owner of a contact, lead, loan, or account entity record that comes from Salesforce. Using Total Expert for Salesforce, you are required to configure what Salesforce object and field of that object you want to define ownership.

Note

Completing this entity mapping does NOT automatically create or update users within Total Expert.

- 1. Click the gear icon to begin mapping the Salesforce object and individual field to be used for owner assignment in Total Expert.
- 2. You can map multiple Salesforce objects to be used when defining ownership. Click the **+ Object Mapping** button to begin configuring your field mapping.

Tot:	المراجعة (Ampping al Expert Data Mapping	×
	TOTAL EXPERT USER MAPPING Create and configure a list of Salesforce objects and record types to represent the various types of user data that will be leveraged to assign ownership with Total Expert. Contact your Total Expert representative for any questions about User entity mapping. NOTE: Mapping the user entity does not create or update Total Expert users and is only used to identify the Salesforce object and field to assign ownership in your Contact, Lead, Loan and Account entity mappings.	
	There aren't any configured objects yet. Add an object to configure to get started. + Object Mapping	

3. Select the **Salesforce Object** and **Record Type** you want to use to define ownership when syncing records with Total Expert.

SETUP Total Expert Data Mappi	ng				×
TOTAL EXPERT USER MAP Create and configure a list ownership with Total Expert does not create or update T Loan and Account entity ma	PING of Salesforce objects and record types to contact your Total Expert representati otal Expert users and is only used to ide appings.	o represent the various ve for any questions abo entify the Salesforce obj	types of user data that will be leverage out User entity mapping. NOTE: Mapp ect and field to assign ownership in yc	ed to assign ing the user entity our Contact, Lead.	ancel
	To begin configuring you Expert User. Once you *Salesforce Object User 	Add New or object, you must first tryle chosen your object,	Mapping choose a Salesforce object to represe you can define its record type if appli Record Type No Record Types Available Cancel	x nt à Total cable.	

4. Under Total Expert Data Mapping, you can change your selection in the **Salesforce Object** drop-down list or add a new object mapping.

lot	al Expert Data Mapping						<u> </u>
	TOTAL EXPERT USER MAPPING Create and configure a list of Salesf ownership with Total Expert. Contac does not create or update Total Exp Loan and Account entity mappings.	orce objects and i t your Total Exper ert users and is o	record types to represent the various types of t representative for any questions about User nly used to identify the Salesforce object and	user data that will entity mapping. N field to assign owr	be leveraged to assign IOTE: Mapping the user entity rership in your Contact, Lead,	Cancel	Save
	Configured Objects		* Salesforce Object		Record Type		
	User No Record Type	â	User	¥	No Record Types Available		*
	+ Object Mapping		User Object Field Mapping Configure the fields for the Salesforce obj	ect that you have	defined above as a Total Expert U	ser entity.	
			TOTAL EXPERT	DATA FLOW	SALESFORCE	REM	OVE
			Email] (-	Email	•	ſ
						Add R	ow
			Email *		SALESFORCE	× add R	i .ov

- 5. Complete your data mapping. The left column lists the user identifier field in Total Expert. Your options are **Email**, **External ID**, or **Username**.
- 6. In the 3rd column, select the corresponding field from Salesforce.
 - a. The value in that field of the Salesforce record will be used to assign ownership in Total Expert.
 - b. If a user does not exist in Total Expert with the value from Salesforce in the identifier field you selected, the record attempting to sync with Total Expert will fail due to not finding ownership.

Field mappings you complete for the Total Expert User entity are used for other entity mappings to define ownership.

Contact Entity

Contacts in Total Expert are individual consumers who are clients or prospects of your organization. Using Total Expert, you can target specific contacts for personalized marketing automation based additional loan and account details you may have.

- 1. Click the gear icon to begin mapping the Salesforce object and individual fields with Total Expert.
- 2. You can map multiple Salesforce objects to sync with Total Expert as contacts. Click the **+ Object Mapping** button to begin configuring your field mapping.



3. Select the first **Salesforce Object** and **Record Type** you want to sync with Total Expert as a contact.

Total Expert Setup Setup	Package Logs 🗸	1
e ^e Setup Total Expert Data Mapping		×
	Add New Mapping	
	To begin configuring your object, you must first choose a Salesforce object to represent a Total Expert Contact. Once you've chosen your object, you can define its record type if applicable.	
	- Salestorice Ubject Record Type	
	Contact Q Cancel Add	
	Case Contact Role Contact	2
	Contact Group Share: Contact Group	

4. Under Total Expert Contact Mapping, you can change your selection in the **Salesforce Object** drop-down list or add a new object mapping.

eate and configure a list of Salesfo					
ntact your Total Expert representa	orce objects and n itive for any quest	ecord types to represent the various types of ions about Contact entity mapping.	contact data that	will be shared with Total Expert.	Cancel Save
Configured Objects		* Salesforce Object		Record Type	
Contact	畲	Contact	•	Borrower	•
+ Object Mapping		Contact Object Field Mapping	act that you have	defined above or a Total Event Contact	tonting
		TOTAL EXPERT	DATA FLOW	SALESFORCE	REMOVE
		*External ID	←	Contact ID	•
		* First Name	←	First Name	•
		* Last Name	←	Last Name	•
		* Source	€	Lead Source	•
		Address	€	Mailing Street	▼ 💼
		Birthday 💌	←	Birthdate	*
		Case		Constant Star	

- 5. Complete your data mapping. The left column lists the names of contact fields in Total Expert. The second column indicates the data flow direction between Total Expert and Salesforce. In the third column, select the corresponding fields from Salesforce.
 - a. You can add or remove rows from the mapping by clicking the icon in the right column.
 - b. When selecting a Salesforce lookup field, you must make a second selection of the field available on the related object.

configured objects		* Salesforce Object		Record Type	
ontact orrower	會	Contact	•	Borrower	₩
 Object Mapping 		Contact Object Field Mapping Configure the fields for the Salesforce o	oject that you have d	lefined above as a Total Expert C	Contact entity.
		TOTAL EXPERT	DATA FLOW	SALESFORCE	REMOVE
		* External ID	(~	Contact ID	•
		* First Name	←	First Name	•
		*Last Name	←	Last Name	•
		* Source	←	Lead Source	•
		Email	-	Email	•
		Employer Name		Employer	· .
				Company Name	w

Note

When mapping a lookup field, the API Field Name in the object field configuration must match the related object name to see the related object fields available.

6. Complete your Contact Related User Mapping. This is where you assign your User Entity mapping to define ownership of the record when it syncs to Total Expert.

Configured Objects		* Salesforce Object		Record Type		
Contact Borrower	亩	Contact	•	Borrower		Ŧ
+ Object Mapping		Contact Object Field Mapping Configure the fields for the Sale	sforce object that you have o	defined above as a Tot	tal Expert Contact er	ntity.
		TOTAL EXPERT	DATA FLOW	SALESFORCE		REMOV
		* External ID	←	Contact ID	v	Û
		* First Name	(-	First Name	٠) iii
		* Last Name	÷	Last Name	٣) iii
		*Source	€	Lead Source	٣	
						Add Row
		Contact Related User Mapping Configure the Salesforce objects) and fields defining the Rela	ited User mapping for	this Total Expert Co	ntact entity.
		ROLE		SALESFORCE RELATED USER	RELATION	ACTIONS

a. In the Lookup Relationship Type drop-down list, select **Direct Lookup**, **Passthrough Lookup**, or **Related User Feature**.

	Edi	t Related l	Jser Mappi	ng	e
Define	where to find the Co	ntact object's R	elated User data	within your Salesforc	e org.
Lookup Relati	onship Type				
Direct Look	qu				•
1					٩
V Direct Lo	okup				
Passthrou	igh Lookup				
Related L	lser Feature				
alesforce Lo	okup Field to Related U	ser			
Select ar	option	*			

1. **Direct Lookup** (commonly used) – This uses a lookup field on the Salesforce record to assign ownership. The value of the field mapped in the User entity is passed as Owner to Total Expert.

	Edit Rela	ted User Mapping	
Define	where to find the Contact obj	ect's Related User data within you	r Salesforce org.
* Lookup Relatio	onship Type		
Direct Looku	p		
* Total Expert Re	elated User Role	* Total Expert Entity Mappin	g Selection
Owner		User	•
* Salesforce Ma	in Object	* Salesforce Related User OI	oject
Contact		User	
* Salesforce Loc	kup Field to Related User		
Owner ID		•	
		ſ	Cancel Save

2. **Passthrough Lookup** – This uses a lookup field on an object related to the Salesforce record to assign ownership. The value of the field mapped in the User entity is passed as Owner to Total Expert.

	NACES OF THE SECOND
Edit Relate	ed User Mapping
Define where to find the Contact obje	ct's Related User data within your Salesforce org.
Lookup Relationship Type	
Passthrough Lookup	×
Total Expert Related User Role	* Total Expert Entity Mapping Selection
Jwner	User 💌
Salesforce Main Object	* Salesforce Related User Object
Contact	User
Salesforce Related User Reference Object	
Account	
Salesforce Contact Lookup Field to Reference O	bject
Account ID	•
Salesforce Reference Lookup Field to Related U	er
Owner ID	*
	Cancel

3. **Related User Feature** – This overrides ownership and uses the value configured in the Related User custom object.



- \diamond
- 7. To create a contact in Total Expert, the record must include:
 - a. first name
 - b. last name
 - c. source
 - d. at least 1 of the following:
 - 1. email address
 - 2. phone number (either cell, home, or office)
 - 3. full address (including city, state, and ZIP code)

Field mappings you complete for the Total Expert Contact entity will also be used for any other contact-related fields in other entity mappings.

Even if you have the mapping completed, the data must be available in the Salesforce record to successfully sync the object. In the example above, suppose you do have the email address mapped, but the Salesforce record you have mapped to the borrower does not have a value in that field. In this case, the loan export will fail.

Occasionally, the data types from your Salesforce field may not match the Total Expert field. When this occurs, it is best practice to create custom fields in Salesforce with the appropriate data types and include logic to manipulate the data as Total Expert would expect. For example, a Boolean in Salesforce may need to be a 0 or a 1 for Total Expert.

Note

If the mapping for Sync with Total Expert is not completed, each record in the correlating object will attempt to sync when it is created or updated. There may be some records you do not want to sync with Total Expert, or you may need to control syncing with Total Expert once the required data is available.

To complete the mapping, have a custom checkbox field created on the corresponding Salesforce object and map it to the Sync With Total Expert field in the configuration. This function will only be performed when mapped to a Salesforce field with a Checkbox field type.

This same functionality can be used for Lead, Loan and Account entities.

Contact Custom Field Sync With Total Expert Back to Contact Fields			Valid	dation Rules (0)		
Custom Field Definition Detail		Edit Set Field-Level Security	View Field Accessibility	Where is this used?		
Field Information						
Field Label	Sync With Total Expert				Object Name	Contact
Field Name	Sync_With_Total_Expert				Data Type	Checkbox
API Name	Sync_With_Total_Expertc					
Description						
Help Text						
Data Owner						
Field Usage						
Data Sensitivity Level						

DTAL EXPERT CONTACT MAPPIN reate and configure a list of Salesf ontact your Total Expert represent	IG force objects and re ative for any quest	ecord types to represent the various types tions about Contact entity mapping.	of contact data that w	ill be shared with Total Expert.	Canc	tel Save
Configured Objects		*Salesforce Object	,	Record Type		
Contact Borrower	☆	Contact	•	Borrower		
+ Object Mapping		Contact Object Field Mapping Configure the fields for the Salesforce of	object that you have d	efined above as a Total Expert Co	ntact entity	n
		TOTAL EXPERT	DATA FLOW	SALESFORCE		REMOVE
		* External ID	<	Contact ID	•	÷
		* First Name	←	First Name	*	÷
		* Last Name	<	Last Name	•	ŵ
		* Source	<i>(</i>	Lead Source	¥	ŵ
		Email	•	Email	•	â

8. When you have mapped all the contact fields you want to use, click the **Save** button.

Email Unsubscribe

You can share email unsubscribe information from Salesforce to Total Expert with a bit of configuration that prohibits emails from being sent out of Total Expert to that address. Additionally, if Total Expert receives an unsubscribe request, the corresponding record in Salesforce is updated to refelect that.

Note

This does not include SMS opt-out details from Salesforce to Total Expert or email *resubscribes* from Salesforce to Total Expert. SMS opt-out information and email resubscribes can be shared from Total Expert to Salesforce.

 If you want to share email unsubscribes from Salesforce to Total Expert, you will be required to map a Salesforce date/time field specific to when the email unsubscribe was received. This is used to check when an unsubscribe is received so that redundant unsubscribes are not made, and to avoid overwriting the most recent email subscription details.

Configured Objects		* Salesforce Object		Record Type	
Contact No Record Type	ŵ	Contact	•	No Record Types Available	*
+ Object Mapping		Contact Object Field Mapping Configure the fields for the Salesforce object	t that you have	defined above as a Total Expert Contact ent	ity.
		TOTAL EXPERT	DATA FLOW	SALESFORCE	REMOVE
		* External ID	←	Contact ID 💌	÷
		* First Name	←	First Name 💌	â
		* Last Name	$\left(\leftarrow\right)$	Last Name 💌	ŵ
		* Source	÷	Lead Source 💌	ŵ
		Email	←	Email	合
		Email Opted Out Date 💌		Email Opt Out Date 💌	â
		Email Opted Out	(\	۹	â
				Email Opt Out Date (Email_Op Fax Opt Out (HasOntedOutOfE	Add Row
				Tax opt out (rissopteroutor)	

- a. If the date/time value is *before* the beginning of the previous sync, an email unsubscribe is not made.
- b. If the date/time value is *after* the beginning of the previous sync, an email unsubscribe is made.
- 2. You will then map your email unsubscribe field in Salesforce to the Total Expert **Email Opted Out** option.

Note

The field in Salesforce must be a checkbox field. If that field is checked (true), an email unsubscribe request is made to Total Expert.

Configured Objects		* Salesforce Object		Record Type	
ontact Io Record Type	會	Contact	•	No Record Types Available	*
 Object Mapping 		Contact Object Field Mapping Configure the fields for the Salesforce of	bject that you have	defined above as a Total Expert Contact e	ntity.
		TOTAL EXPERT	DATA FLOW	SALESFORCE	REMOVE
		* External ID	(Contact ID 💌	
		* First Name	←	First Name 💌	
		* Last Name	[←]	Last Name 💌	
		* Source	(-	Lead Source 💌	Ť
		Email	•	Email	a
		Email Opted Out Date	•	Email Opt Out Date 💌	a
		Email Opted Out		Email Opt Out	
				Q	Add Row
				✓ Email Opt Out (HasOptedOut	•
		6 C M		Email Opt Out Date (Email Op.,	

3. Between the fields is the data flow indicator. By clicking it, you can make this feed from Salesforce to Total Expert, Total Expert to Salesforce, or both (bi-directional sync).

Note

No other fields allow you to manipulate the data flow indicator, as a majority of fields are Salesforce-to-Total Expert only.

Configured Objects		* Salesforce Object		Record Type	
Contact No Record Type	Ċ	Contact	•	No Record Types Available	•
+ Object Mapping		Contact Object Field Mapping Configure the fields for the Salesforce obj	ect that you have (defined above as a Total Expert Conta	ct entity.
		TOTAL EXPERT	DATA FLOW	SALESFORCE	REMOVE
		* External ID	←	Contact ID	•
		* First Name	(c)	First Name	•
		* Last Name	<	Last Name	•
		* Source	←	Lead Source	•
		Email		Email	• 💼
		Email Opted Out Date		Email Opt Out Date	•
		Email Opted Out	2	Email Opt Out	• 💼
					Add Row

For unsubscribes to flow from Salesforce to Total Expert, ensure the option is pointing left or is bi-directional.

For unsubscribes to flow from Total Expert to Salesforce, ensure the arrow is pointing right or is bi-directional. In this case, you must also subscribe to the email unsubscribe webhooks in the Engagement Webhook Subscription.

ate a samshore Public site in order to subscripe to foral speer engagemen paste is USL in the "Salesforce Jublic Site USL" input below. Select the responding engagement activities will be fed back into Salesforce. Click "U engagement activities.	its. Once you have successfully created your public engagement activity subscriptions to enable. The pdate Subscription" to apply changes to the subscri
veed help creating a public site?	Update Subscription
Connected	
Salesforce Public Site URL	
nttps://expertoank.my.salesforce-sites.com/1	
All Webhook Events All Subscribed Events (3)	
Q Search Events	
Email Resubscribed Created	
Email Unsubscribe Updated	

Contact Grouping

Contact groups in Total Expert are used to categorize contacts and trigger specific marketing actions in journeys.

Contact groups in Salesforce are shared with Total Expert using a junction object, which allows you to correlate a single group or several groups with a contact.

1. Your Contact Group Mapping is completed at the bottom of the Total Expert Contact Mapping exercise. Begin by clicking the **Add Row** button.

* Last Name	←	Last Name		•
* Source	F	Lead Source)	• 1
Email	r (~	Email		• 💼
Sync With Total Expert		Sync With Total E	xpert	• 💼
				Add Ro
Contact Related User Mapping Configure the Salesforce objects and fiel	elds definin <mark>g</mark> the Rela	ited User mapping for	this Total Expert	Contact entity
Contact Related User Mapping Configure the Salesforce objects and fiel ROLE	elds defining the Rela	SALESFORCE RELATED	this Total Expert	Contact entity
Contact Related User Mapping Configure the Salesforce objects and fiel ROLE *Owner	elds defining the Rela	SALESFORCE RELATED USER OBJECT User	this Total Expert	ACTIONS
Contact Related User Mapping Configure the Salesforce objects and fiel ROLE * Owner Contact Group Mapping Configure the Salesforce objects and fiel	elds defining the Rek	Ated User mapping for SALESFORCE RELATED USER OBJECT User	RELATION	ACTIONS
Contact Related User Mapping Configure the Salesforce objects and fiel ROLE *Owner Contact Group Mapping Configure the Salesforce objects and fiel SALESFORCE GROUP OBJECT	elds defining the Rela	sted User mapping for SALESFORCE RELATED USER OBJECT User up mapping for this To	this Total Expert RELATION	ACTIONS

2. Select the Junction object that corresponds to your Salesforce object. This Junction object must have your mapped Contact object as a Master-Detail data type.

Define where to find the Contact	Object's Group data within your Salesforce *Group Object	org.
Contact Group Relationship	Contact Group	•
* Junction Lookup Field to Group	* Group Name Field	
Contact Group (Contact_Group_c)	TE Name (TE_Name_c)	•
*Junction Lookup Field to Contact		
Contact (Contact_c)	•	

3. Select the object that represents the group, the lookup field in the Junction object for the group, the field in the group object to be used as the name, and finally the lookup field for the contact.

Lead Entity

The Total Expert Lead entity represents a contact's interaction with your organization from a specified source, and indicates an opportunity.

Example

If a consumer were shopping for a mortgage on LendingTree and was matched with your organization, LendingTree would send a lead to Total Expert, which creates a contact record and an associated lead record. If that consumer then navigates to your website and completes a contact form, another lead would be sent to Total Expert. Since the contact already exists, the new lead will be associated with the same contact. 1. Similarly to contacts, you can map many Salesforce objects to be synced with Total Expert as leads. Click the **+ Object Mapping** button to begin.

Tot	al Expert Setup	Setup	Package Logs 🗸		
SETUP Tota	l Expert Data Mapp	oing			×
	TOTAL EXPERT LEAD MAP Create and configure a list Contact your Total Expert re	PING of Salesford epresentativ	e objects and record types to represent the various types of lead data that will be shared with Total Expert. e for any questions about Lead entity mapping.	Cancel Save	
			There aren't any configured objects yet. Add an object to configure to get started.		
			+ Object Mapping		

2. Select your **Salesforce Object** and **Record Type** (if applicable).

Ad	dd New	Mapping		
To begin configuring your object, yo	ou must first	choose a Salesforce obje	ct to represent	a Total
to be a contract of the source source source of the source	your object,	you can define its recom	s type it applies	iore.
Select an option		No Record Type	lable	*
Lead	٩			
Lead			Cancel	Add
Lead Share				

3. Complete your lead field mapping and lead group mapping similar to how you completed the contact mapping and contact group mapping.

DTAL EXPERT LEAD MAPPING reate and configure a list of Salesf ontact your Total Expert represent	orce objects and r ative for any quest	ecord types to represent the various tions about Lead entity mapping.	s types of lead data that will l	be shared with Total Expert.	Ca	ncel Save
Configured Objects		* Salesforce Object		Record Type		
Lead No Record Type	â	Lead	•	No Record Types Available		*
		Lead Object Field Mapping Configure the fields for the Sales	force object that you have o	lefined above as a Total Expension SALESFORCE	rt Lead entity.	REMOVE
		* Email	<i>(</i> -	Email		*
		* External ID	E	Lead ID	v	Ť
		* First Name	←	First Name	¥	ŵ
		* Last Name	(Last Name	v	ŵ
		* Source	€	Lead Source	v	ŵ
					(Add Row

Just like for the Contact entity, the Lead Related User Mapping is required for the Lead entity.

First name, last name, source, and email are required to create a lead successfully in Total Expert.

The Lead entity allows you to include opportunity details like loan purpose, loan amount, occupancy, and more.

Loan Entity

The Loan entity in Total Expert represents a configurable line of credit related to a contact record and additional participants. Because your organization may have different types of credit (mortgage, auto, student, and so on), the application allows for multiple Salesforce objects to be mapped to different account classes in Total Expert.

TOTAL EXPERT LOAN MARPING Create and configure a list of Saledorce objects and record types to represent the various types of ioan data that will be shared with fotal Expert. Contact your Total Expert representative for any questions about Loan entity mapping. Add New Mapping To begin configuring your object, you must first choose a Saledorce object to represent a Total Expert Loan. Once you've chosen your object, you can define its record type if applicable. Finally, you must define your Total Expert account class. *Saledforce Object Conce Account Class Mortgage Cance Add	• S T	otal Expert Data Mapp	ing				
Add New Mapping To begin configuring your object, you must first choose a Salesforce object to represent a Total Expert Loan. Once you've chosen your object, you can define its record type if applicable. Finally, you must define your Total Expert account class. * Salesforce Object: Record Type Loan Record Type * Account Class * Mortgage *						id with Total Expert. Cancel Some	
To begin configuring your object, you must first choose a Salesforce object to represent a Total Expert Loan. Once you've chosen your object, you can define its record type if applicable. Finally, you must define your Total Expert account class. * Salesforce Object: Coan Record Type			ľ	Add New	Mapping		
*Salesforce Object Record Type Loan Record Types Available *Account Class Mortgage Cancel Add				To begin configuring your object, you must firs Expert Loan. Once you've chosen your object, y you must define your Ti	t choose a Salesforce object to repre: ou can define its record type if applic otal Expert account class.	sent a Total able. Finally,	
Loan No Record Types Available Account Class Mortgage Cancel Add				* Salesforce Object	Record Type		
*Account Class Mortgage Cancel Add				Loan 💌	No Record Types Available	*	
Cancel Add				* Account Class			
Cancel				Mortgage		*	
Cancel					20	_	
					Cancel	Add	

Just like for the Contact entity, the Loan Related User Mapping is required for the Loan entity.

When syncing the Loan entity to Total Expert, the application uses a lookup field to determine the participant details to be included. When using these details, first name, last name, source, and either email address, phone number or full mailing address (street address, city, state, and ZIP code) must be included in the lookup field record to successfully create the participant.



Optionally, you can use a Junction object to determine the loan participant mapping.

When a junction object is used, select your Total Expert Contact mapping, the Junction Object used to define the participant, and the master-detail relationship between the loan and participant record.

Additionally, you can select a filter field and value (must be a picklist) available on the junction object to exclude any junction object records that are not relevant for that participant.

Edit	Particip	oant Mapping			
Define where to find the Lo	an object's	Participant data within your	Salesforce org.		
Use a junction object to define the	e Participan	t relationship. This will chan	ge the inputs below.		
* Total Expert Participant Role		* Total Expert Entity Mappi	ing Selection		
3orrower.		Contact (Borrower)	٣		
Salesforce Junction Object		* Salesforce Participant Ob	oject		
Loan Participant	٣	Contact			
Salesforce Junction Lookup Field to Par	ticipant				
Contact	٣	Filter junction record	ds by picklist value		
		* Junction Picklist Field	* Junction Picklist Value		
		Participant Type 🔻	Primary Borro 🔻		
Salesforce Junction Lookup Field to Loa	an				
Loan			٣		

Since you can configure many contact mappings, you must select the field mapping you want to use when sharing the participant with Total Expert.

When syncing the participant to Total Expert, an attempt to create a contact record is made following Total Expert's deduplication logic, but the full contact payload will be passed including custom fields and contact groups.

If a class you want is not reflected in the available drop-down list, it must be configured directly with Total Expert to become available.

Account Entity

Total Expert's Account entity represents different types of accounts you may have with a consumer. This is generally a checking, savings, or investment account but could include other products if they fall within the account's framework. The application allows for multiple Salesforce objects to be mapped to different account classes in Total Expert.

DTAL EXPERT ACCOUNT MAPP reate and configure a list of Sale ontact your Total Expert represer	ING sforce objects and r ntative fo <mark>r</mark> any ques	ecord types to represent the various t tions about Account entity mapping.	ypes of account data that v	vill be shared with To	otal Expert.	Cancel
Configured Objects		*Salesforce Object	Record Type		* Account Class	
Insurance Policy No Record Type	會	Insurance Policy	No Record Types A	vailable 🔻	Policy	¥
+ Object Mapping		Account Object Field Mapping Configure the fields for the Salesfo	orce object that you have d	efined above as a To	ital Expert Accour	nt entity.
		TOTAL EXPERT	DATA FLOW	SALESFORCE		REMOVE
		* Account Number	~	Select an opti	on	•
		* External ID	÷	Insurance Policy I	D	•
						Add Row
		Account Related User Mapping Configure the Salesforce objects a	nd fields defining the Relat	ed User mapping fo	r this Total Expert	Account entity.
		ROLE		SALESFORCE RELATED USER OBJECT	RELATION	ACTIONS
		* Owner	4			ð / 🕆

Just like for the Contact entity, the Account Related User Mapping is required for the Account entity.

When syncing the Account entity to Total Expert, the application uses a lookup field to determine the participant details to be included. When using these details, first name, last name, source, and either email address, phone number or full mailing address (street address, city, state, and ZIP code) must be included in the lookup field record to successfully create the participant. Participant mapping behaves similarly to loan mapping.

Optionally, you can use a Junction Object to determine the Account participant mapping.

When syncing the participant to Total Expert, an attempt to create a contact record is made and follows Total Expert's deduplication logic, but the full contact payload will be passed including custom fields and contact groups.

If a class, type, or status you want is not reflected in the available drop-down list, it must be configured directly with Total Expert to become available.

Once you have mapped the objects you wish to complete, click the **Finish** button. You are returned to the Total Expert Setup Assistant.

Asynchronous Transactions

1. Click the **Start** button to set up Asynchronous Apex Transactions.

	TotalExpert	
	Package Version: 3.9 Export Job Next Run: Not Activated Overseer Job Next Run: Not Activated	
0	System Connections Gain access to Total Expert and configure your Total Expert Iframe.	Edit
0	Total Expert Data Mapping Determine how your Total Expert data is reflected in Salesforce.	Edit
3	Asynchronous Apex Transaction Configuration	Start

2. Enter a limit value in the Daily Async Apex Transactions field.

SETUP Asynchronous Apex Transaction Configuration	×
Async Apex Transaction Limiter Determine how many of you orgs daily async apex transactions Total Expert will be allowed to make. If you happen to exceed your daily limit, any outstanding transactions will be stopped from processing. DAILY ASYNC APEX TRANSACTION LIMIT 0/250,000 Async Apex Transactions 0/250,000 S0,000 50,000	Finish 🗸

3. Click the **Finish** button.

You are returned to the Total Expert Setup Assistant.

Package Log Management

Configuring the package and error logging includes limiting the number of error logs.

1. Click the **Start** button.

808 808 808	Total Expert Setup	Setup	Package Logs 🗸	
			lotalExpert	
			Package Version: 3.9 Export Job Next Run: Not Activated Overseer Job Next Run: Not Activated	
		0	System Connections Gain access to Total Expert and configure your Total Expert Iframe.	Edit
		0	Total Expert Data Mapping Determine how your Total Expert data is reflected in Salesforce.	Edit
		0	Asynchronous Apex Transaction Configuration Set a value of how many asynchronous Apex transactions your org can make per day.	Edit
		4	Package Log Management Configure settings for creating and saving logs in your Salesforce org.	Start
		5	Outbound Data Sync Configure a time for when Salesforce syncs data with Total Expert.	
		6	Engagement Webhook Subscription Provide a Salesforce Public Site to subscribe to Total Expert engagements.	
_		6	Engagement Webhook Subscription Provide a Salesforce Public Site to subscribe to Total Expert engagements:	

- 2. The Logging Enabled toggle switch is enabled by default. Click the switch to disable it.
- 3. You can determine whether all logs or only error logs are maintained in the **Logs Captured** drop-down list. Errors Only is selected by default.
- 4. In the **Max Log Records Retained** field, enter a number to limit the number of records kept available. This helps you control the amount of storage used by the Package Logs object as part of the Total Expert app.
- 5. If any logs are currently stored, you can click the **Delete All** button to purge them.
- 6. Click the **Save** button to save your settings.
- 7. Click the **Finish** button.

Package Log Management	x
This a for u	Log Management app comes with the Log custom object and automatically creates activity logs use in the debugging process. You can choose to log both success and error activity, or error activity alone.
Lo	agging Enabled V Save
ەم	ggs Captured Errors Only ▼ Finish ✓
	Max Log Records Retained 0 1,000
a	urrent Logs Captured: 0

TOTAL EXPERT

Outbound Sync

This feature allows you to schedule a daily sync of Salesforce data to Total Expert. Data is normally pushed to Total Expert every 15 minutes. If you reach your Apex transaction limit during a given 15-minute span, the job is stopped until the next cycle. If any records were missed while the job is stopped, the daily sync allows Total Expert to catch up to the missed data.

1. Click the **Start** button.



- 2. Select a time in the **Job Start Time** field.
- 3. Click the **Activate** button.

31

Schedule you	Outbound Data Sync r overseer jobs for sending entity data from Salesforce to Total Expert.	
Determine a time for when d	lata will be sent to Total Expert. The time selected will start the overseer jobs every 24 hours.	
Job Start Time		
4:00 am	▼ Activate	
Below are all other schedule Other Scheduled Jobs	ed Apex jobs in your Salesforce org. Avoid scheduling your overseer jobs at the same time as the Apex jobs listed.	
JOB NAME	NEXT RUN TIME	
	No scheduled jobs	

4. Click the **Finish** button.

You are returned to the Total Expert Setup Assistant.

Engagement Webhook Subscription

In this section, you can subscribe to any of Total Expert's available webhook engagements, including email sent, email open, Customer Intelligence insights, and more. Receiving these in Salesforce allows you to customize actions in Salesforce to modify your customer journey.

1. Click the **Start** button.



2. Create a Salesforce Public Site to subscribe to Total Expert Engagement Activities and enter its URL in the **Salesforce Public Site URL** field.

Note

Total Expert Engagement Activities are activities that Total Expert is aware of when interacting with the contact.

ate a Salesforce Public Site in order to subscribe to Total Expert engagemen te its URL in the "Salesforce Public Site URL" input below. By default, all eng. fjust which engagement activities will be fed back into Salesforce. Click "Upc engagement activities.	ubscription nts. Once you have successfully created your public site, jagement activity subscriptions will be enabled. You can date Subscription" to apply changes to the subscribed
Need help creating a public site?	Subscribe
😧 Not Connected	
Salesforce Public Site URL	
https://www.sample.com	Fin
All Subscribed Events (0)	
All Subscribed Events (0)	
All Subscribed Events (0)	
All Webhook Events All Subscribed Events (0) Q SMS S Journey Sms Failure Created Sms Delivered Created	
All Webhook Events All Subscribed Events (0) Q. SMS Image: SMS interface Journey Sms Failure Created Image: Sms Delivery Failure Created Sms Delivery Failure Created Image: Sms Delivery Failure Created	
All Webhook Events All Subscribed Events (0) Q SMS Image: SMS series Journey Sms Failure Created Image: Sms Delivered Created Sms Delivery Failure Created Image: Sms Opt In Sent Created	

- 3. Under **All Webhook Events**, you can search for any available webhook with Total Expert.
- 4. Subscribe to a webhook by clicking the toggle switch to move it to the On position.

Note

You can update your subscriptions if you ever want to add or remove events later.

- 5. Click the **Subscribe** button to activate your selections.
- 6. Click the **All Subscribed Events** tab to see the items you have subscribed to.

eate a Salesforce Public Site in ord iste its URL in the "Salesforce Public djust which engagement activities	Engagement Webhook Sul er to subscribe to Total Expert engagement c Site URL" input below. By default, all enga will be fed back into Salesforce. Click "Upda engagement activities.	bscription s. Once you have successfully created your public site, gement activity subscriptions will be enabled. You can ate Subscription [®] to apply changes to the subscribed
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Email Link Clicked Created		
Email Opened Created		
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7. Click the **Finish** button.

You are returned to the Total Expert Setup Assistant.

When viewing notifications:

- a. Webhook notifications that are not insights will be available in the Engagement Activities object.
- b. Webhook notifications that are insights will be available in the Insight Activities object.

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3	IA-00003	Customer Intelligence: Credit Inquiry Alert		119		3/	16/2023, 12:	25 PM				
4	A-00004	Customer Intelligence: Credit Inquiry Alert		119		3/	16/2023, 12:	29 PM				
5	A-00005	Customer Intelligence: Credit Inquiry Alert		119		3/	16/2023, 12:	34 PM				
6	IA-00006	Customer Intelligence: Credit Inquiry Alert		119		3/	17/2023, 6:4	5 AM				
7	IA-00007	Customer Intelligence: Credit Inquiry Alert		119		3/	17/2023, 11:	81 AM				
8	IA-00008	Customer Intelligence: Credit Inquiry Alert		119		3/	17/2023, 12:0	05 PM				•

You are returned to the Total Expert Setup Assistant. When all the sections show a checkmark, installation is complete.



Lightning Components

There is a Total Expert Activity timeline Lightning component that you can add to record pages.

1. From the settings menu, select Edit Page.

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Total Expert Setup Setup	Contacts V X	ACTION AND A MARKED THE STREET	Setup	NS. JHI
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Related Details News			Activity Char Edit Page	
X We found no potential duplicates	of this Contact.		New Task New E	
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Cases (0)		New	Filters: All time • All activitie Refresh • Ex	s • All types 🔻
			✓ Upcoming & Overdue	
Notes & Attachments (0)		Upload Files	No next steps. To get things moving, add a task or set up a	meeting.
			No past activity. Past meetings and tasks marked a here.	as done show up
Campaign History (0)		Add to Campaign	· · · · · · · · · · · · · · · · · · ·	

2. Drag and drop the **Total Expert Activity** component from the Custom – Managed section onto the main panel.

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re components available.		Loans (Sellers Agent) (0) Accounts (0)	New Change Owner			
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Total Expert Activity						

- 3. Click the **Save** button to save the edited Lightning page.
 - If this is the first time the Lightning page for that object has been edited, the edited page may need to be activated. Activate the page as the default for the entire org, just a specific app, or according to profiles, as required for that specific record.
- 4. On the next few screens, assign this Lightning record page as the app default for the Total Expert app.
 - a. Select the **APP DEFAULT** tab.
 - b. Click the Assign as App Default button.

	Activ	vation: Bot Configuration Record Page
Custom record p The org default Custom record p Custom	ages can be assigned t record page displays for a ault page assignment, if sp p, record type, profile assi ghtning page assignment.	at different levels: n object unless more specific assignments are made. ecified, overrides the org default. ignments override org and app defaults.
ORG DEFAULT	APP DEFAULT	APP, RECORD TYPE, AND PROFILE
Set this page as the defa app unless specific app,	ault for Bot Configuration r record type, and profile as	records for specific Lightning apps. An app default page displays for all the object's records in an ssignments are made.
Assign as App Defaul	t	

- 5. Click the **Save** button.
- 6. Click **Back** to see the edited record page.

Troubleshooting

Error Log

As part of the Total Expert integration with Salesforce, there is an Error Log available to you for troubleshooting.

1. Select **Apps** and search for Package Logs.



2. You can modify the Package Log object to filter down to the details you need.

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1		E-00790	Debug	Successful batch run with object Contact	*	
2		E-00788	Debug	Successful GET request to Total Expert for activity		
3		E-00789	Debug	Successful GET request to Total Expert for contacts		
4		E-00787	Error	null input to JSON parser		
5		E-00783	Debug	Successful GET request to Total Expert for activity		
6		E-00784	Debug	Successful GET request to Total Expert for contacts		
7		E-00785	Debug	Successful GET request to Total Expert for activity		
8		E-00786	Debug	Successful GET request to Total Expert for contacts		
9		E-00781	Debug	Successful GET request to Total Expert for activity		
10		E-00782	Debug	Successful GET request to Total Expert for contacts		
11		E-00780	Debua	Successful batch run with object Contact		

When reaching out to Total Expert for assistance and support, please include the details of the error log during your research.

Package Log E-00787			
Related Details	5****>\/ (\ \'*)		\bigcirc \bigcirc $,$ \nearrow
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User Access Token Refresh

Part of the Total Expert managed app includes the ability to use the Total Expert experience in an iframe from within Salesforce. Occasionally, a user's access token may need to be reset due to mistakenly being iframed as a different user. This could happen when a Total Expert user is impersonating another when they select the Grant Access option.

To clear the token, click the Manage button in the Total Expert User Access Tokens section of the setup assistant:



Enter the user's Salesforce email address, and click the **Clear User Access Token** button.

Jonnige	Manage User Access Tokens	
Enga <u>c</u> Provide	Use this tool to resolve issues with Marketing iframe authentication. Enter the email of the Salesforce user whose Total Expert access token you wish to clear from the Salesforce cache. Once cleared, the Marketing iframe user will be prompted to reauthenticate to Total Expert to regain access to the iframe.	
	*Salesforce User Email testuser@totalexpert.com	
otal E		
anage	Cancel Clear User Access Token	

Once this is completed successfully, the user will be prompted to grant access to Total Expert again the next time they navigate to the iframe interface.