Salesforce Installation Guide

Table of Contents

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.

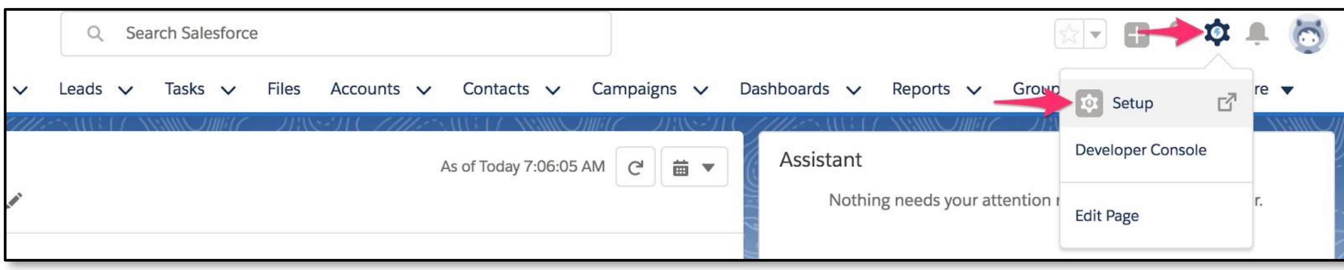
Introduction

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 upper-right corner and select **Setup**. Once in Setup, you can use the Quick Find box to find and navigate to the appropriate section.



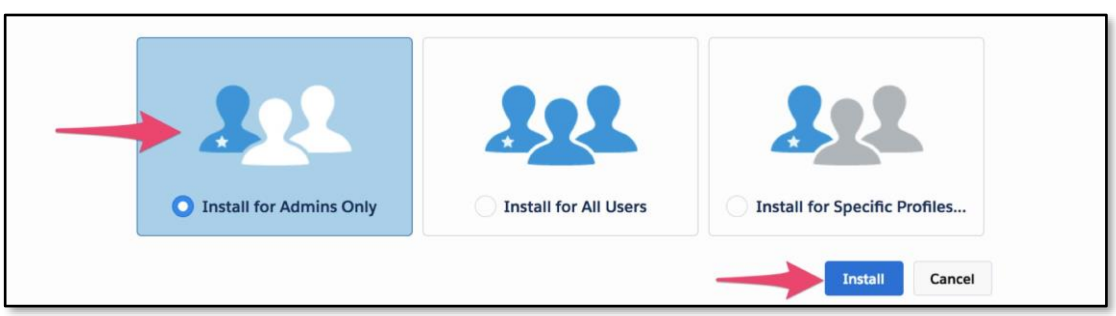
Installation

Installing the Total Expert Package

Navigate to the Salesforce AppExchange and search for Total Expert, or navigate to the listing here. 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, click here 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

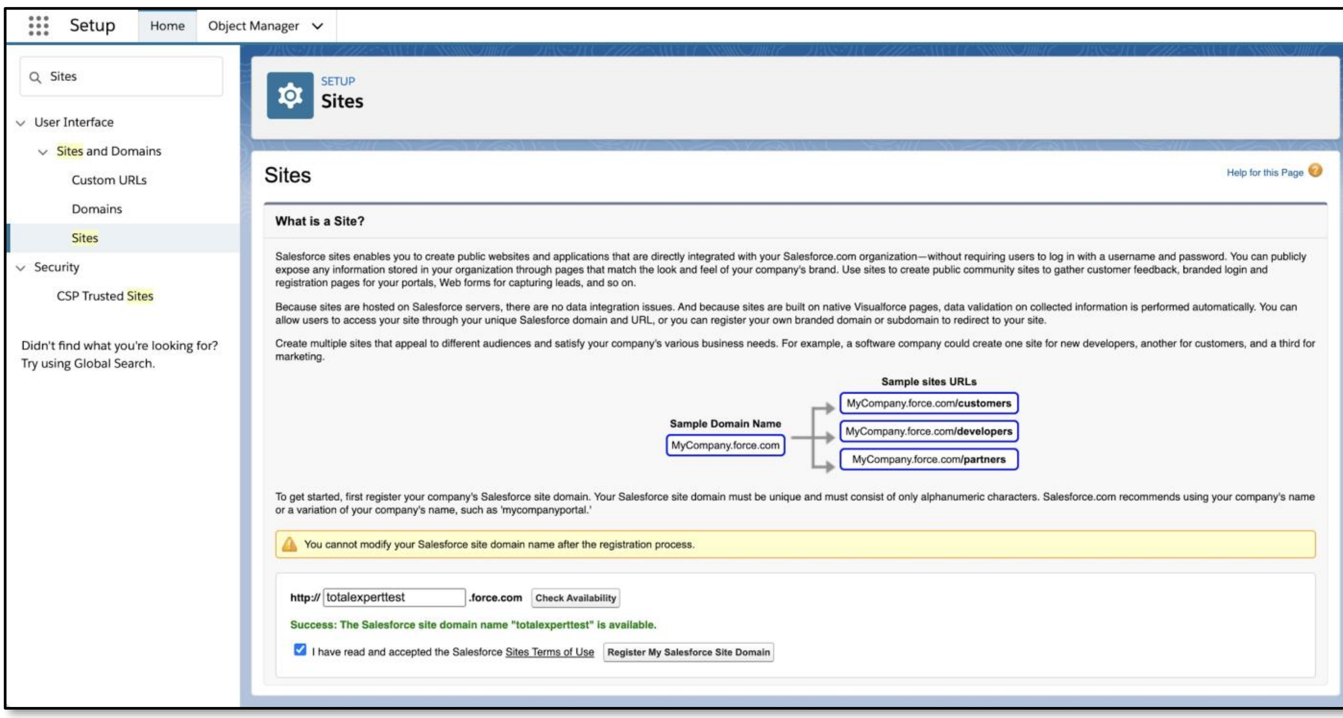
The Total Expert application provides 3 permission sets:

- **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.

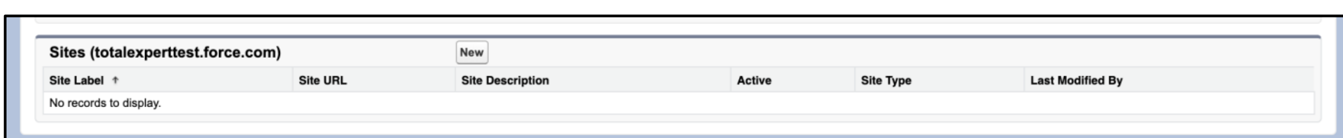
The Total Expert Site User must be assigned to the public site guest user to subscribe to the Total Expert engagements.

Create a Site

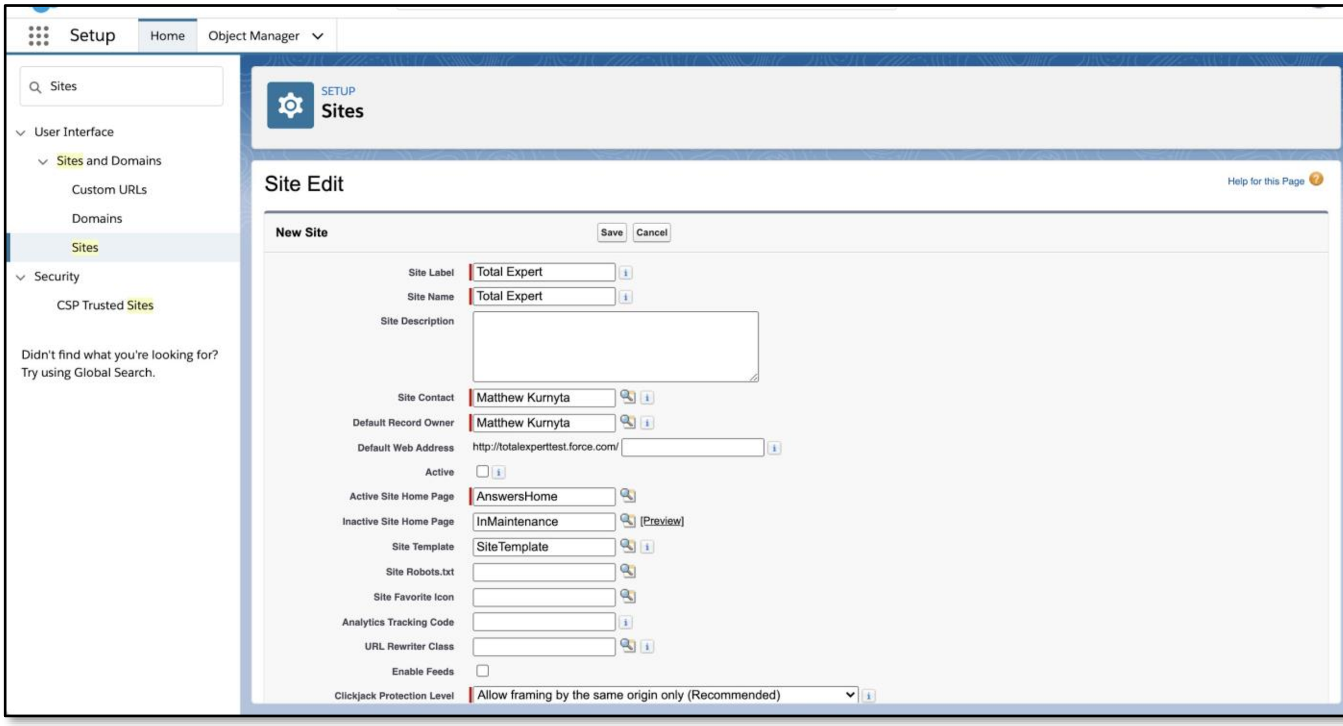
1. Click the **Register My Salesforce Site Domain** button.



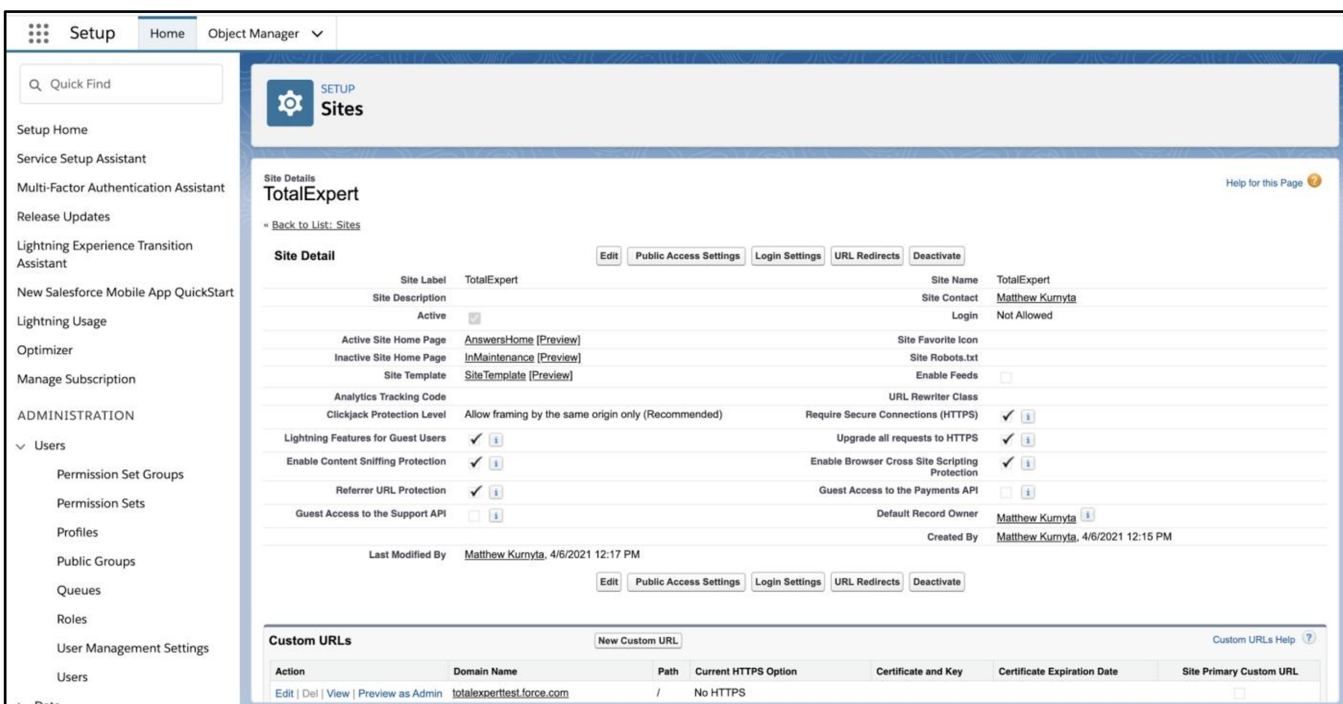
2. Click the **New** button.



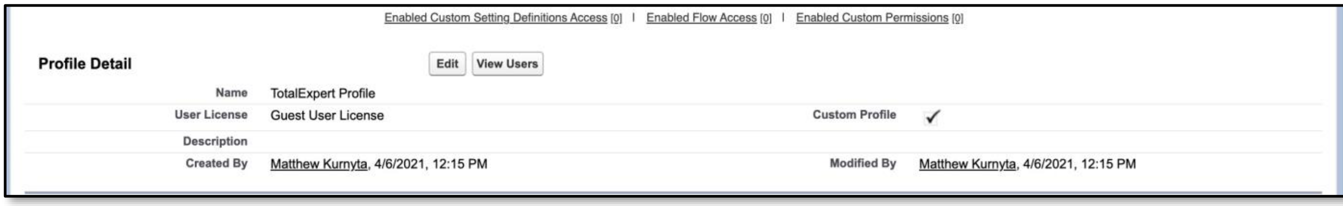
3. Enter a **Site Label** and a **Site Name**.
4. Select an **Active Site Home Page**.
5. Click the **Save** button.
6. Activate the site.



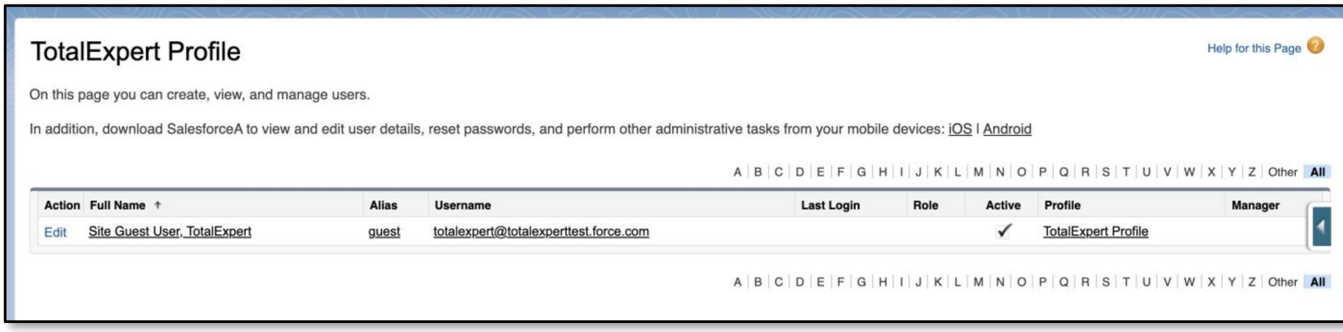
7. Click the **Public Access Settings** button.



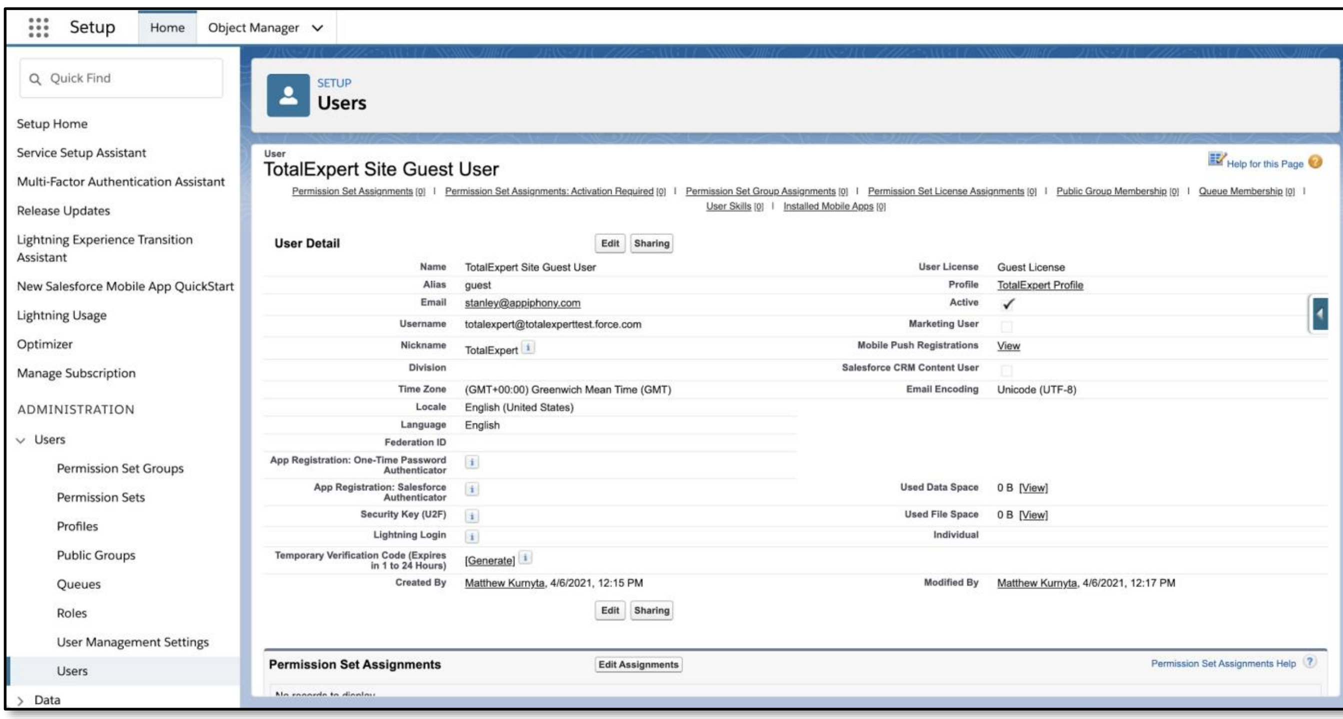
8. Click the **View Users** button.



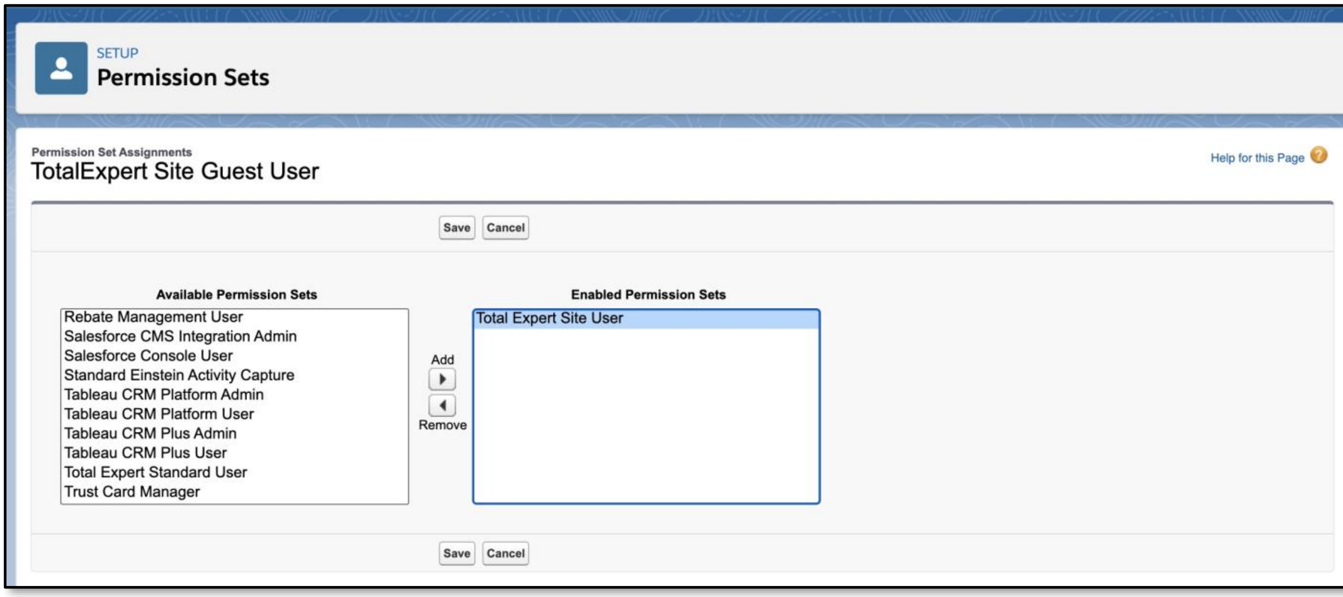
9. Click the username.



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

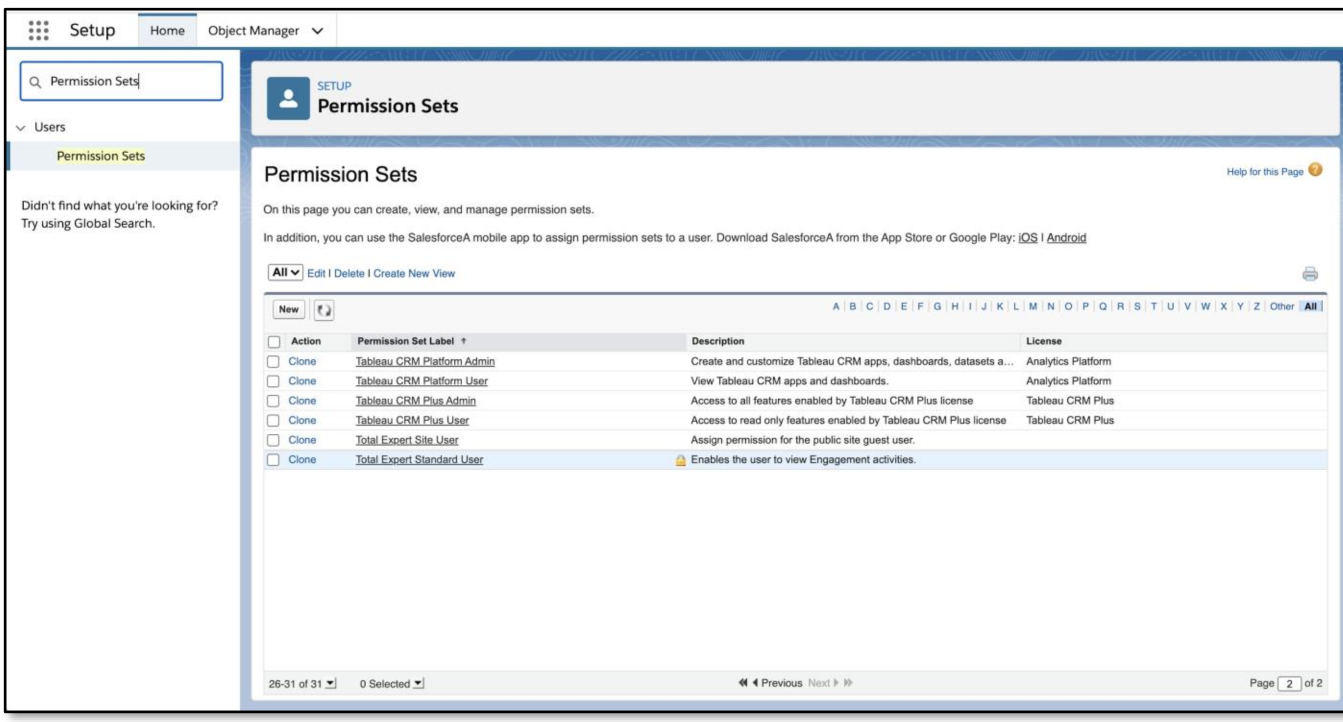


11. Add the **Total Expert Site User** permission set.
12. Click the **Save** button.

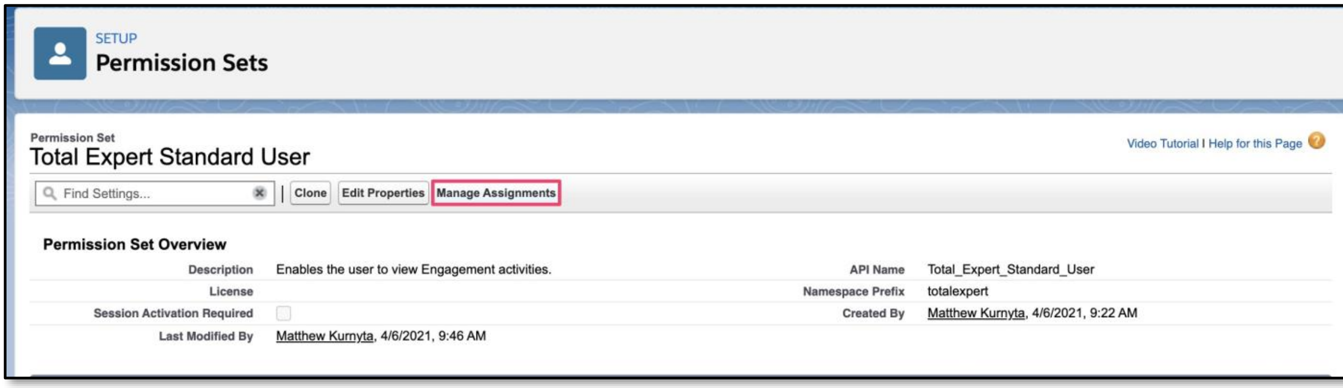


You must assign the Total Expert Standard User to any user that will be interacting with the Total Expert Activity component.

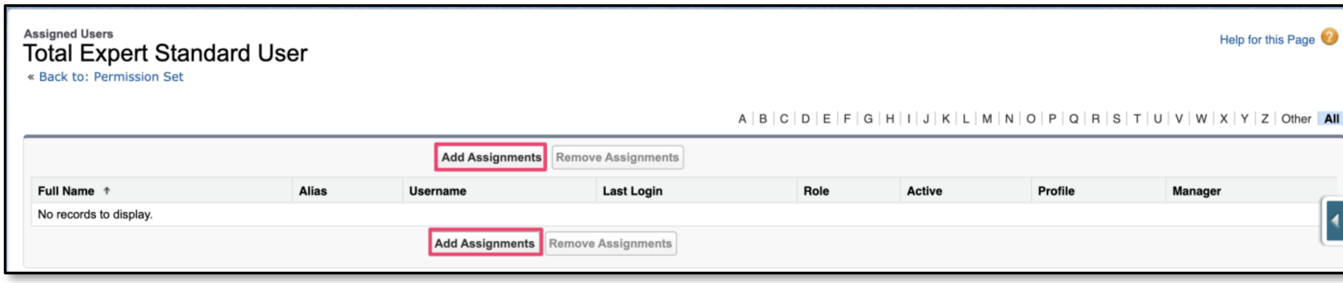
1. In Setup, search for Permission Sets.
2. Select the **Total Expert Standard User**.



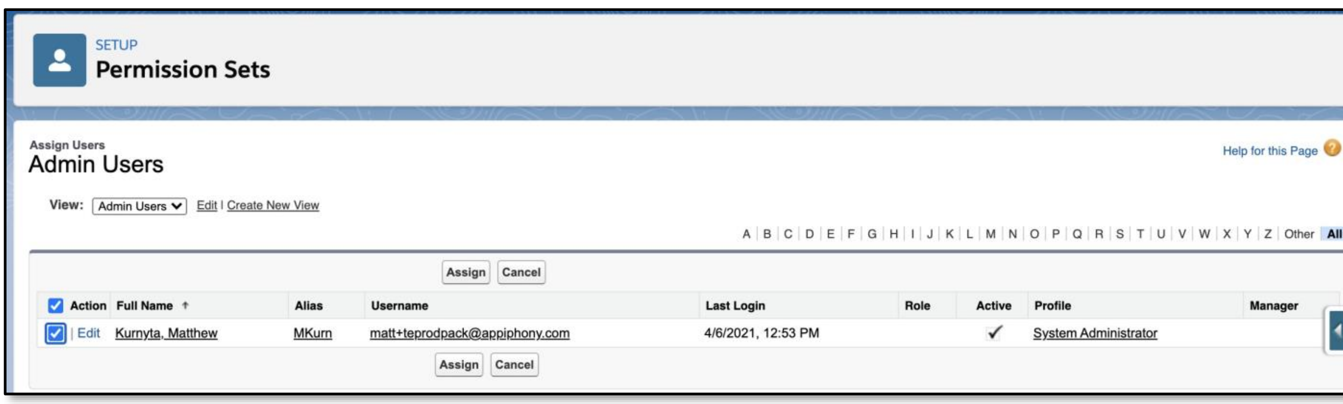
3. Click the **Manage Assignments** button.



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



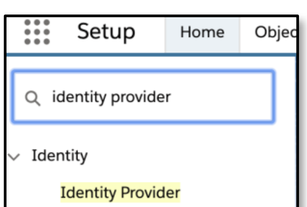
5. Assign to users.



Identity Provider

Identity Provider must be enabled to access SAML login information.

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

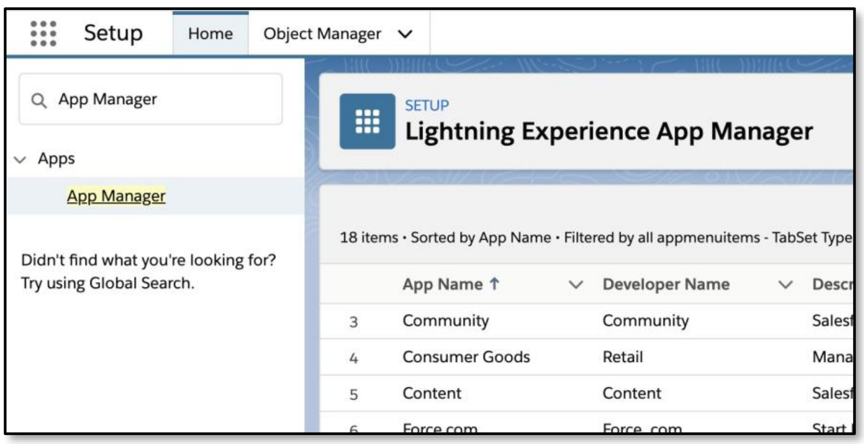


3. Click the **Enable Identity Provider** button.

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.

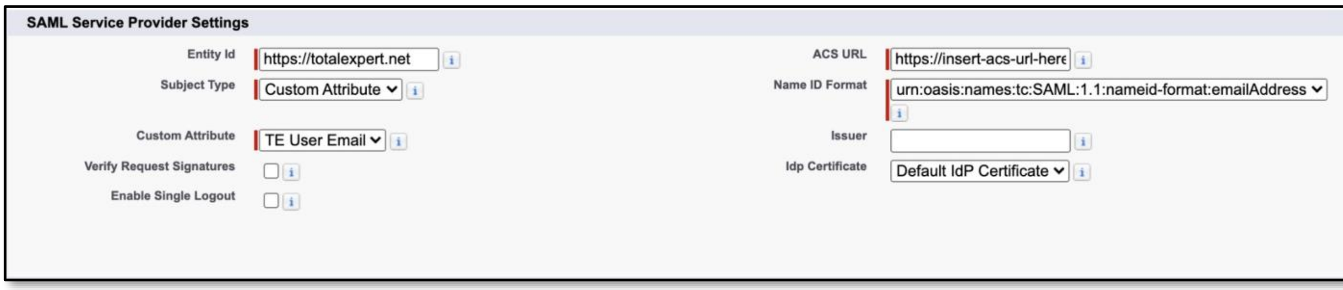
1. Navigate to **Setup**.
2. Search for app manager.
3. Select **App Manager**.



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

5. Click the **Edit Policies** button.

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



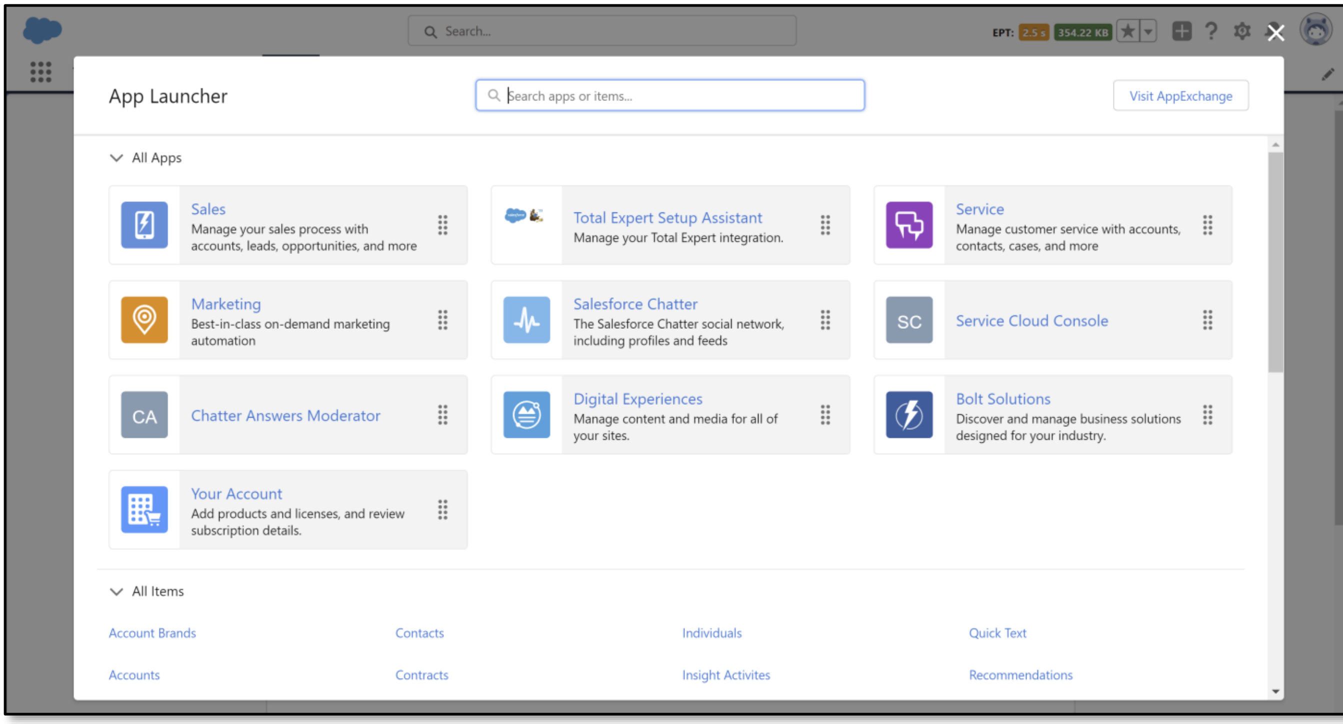
7. Click the **Save** button.

Setup Assistant

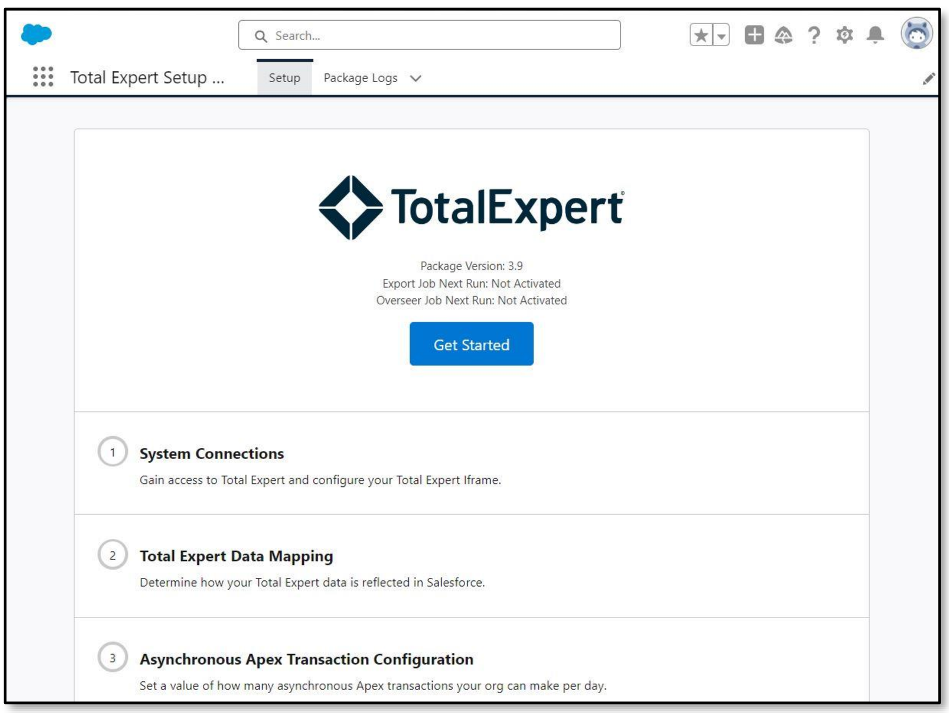
Total Expert Setup Assistant

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**.

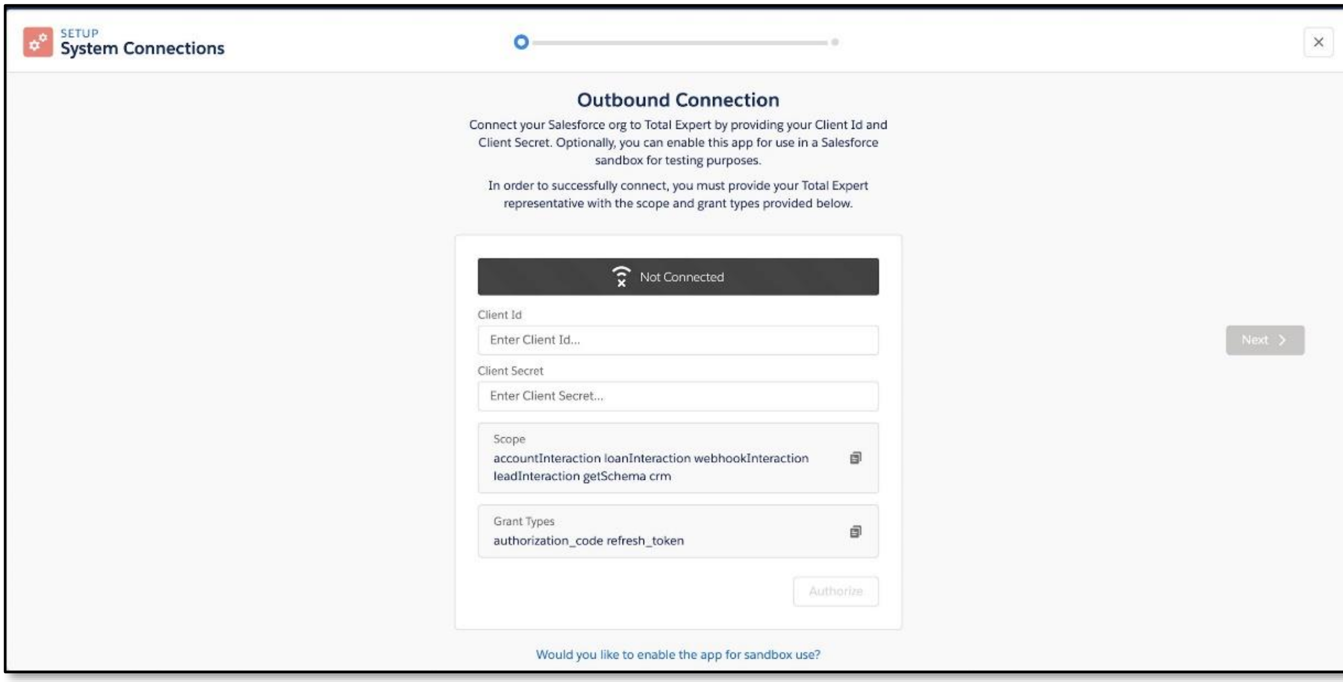


2. Click the **Get Started** button.



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.



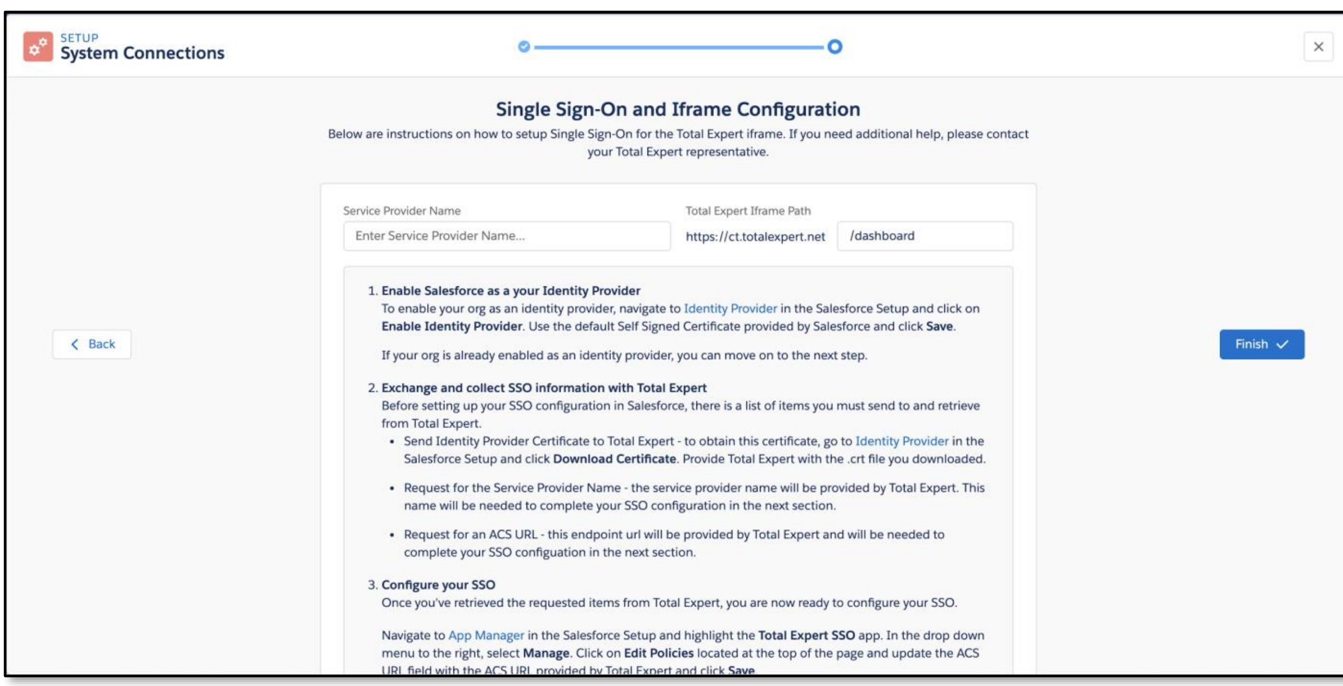
4. Contact your Total Expert representative to obtain the information needed to complete the Single Sign-On and Iframe Configuration page.

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.

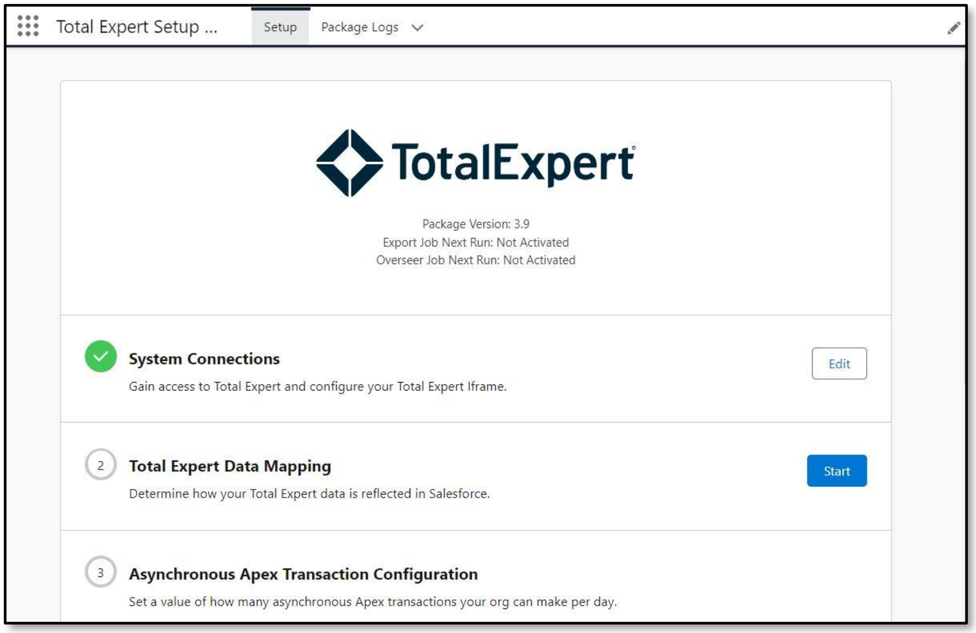
5. Click the **Finish** button.



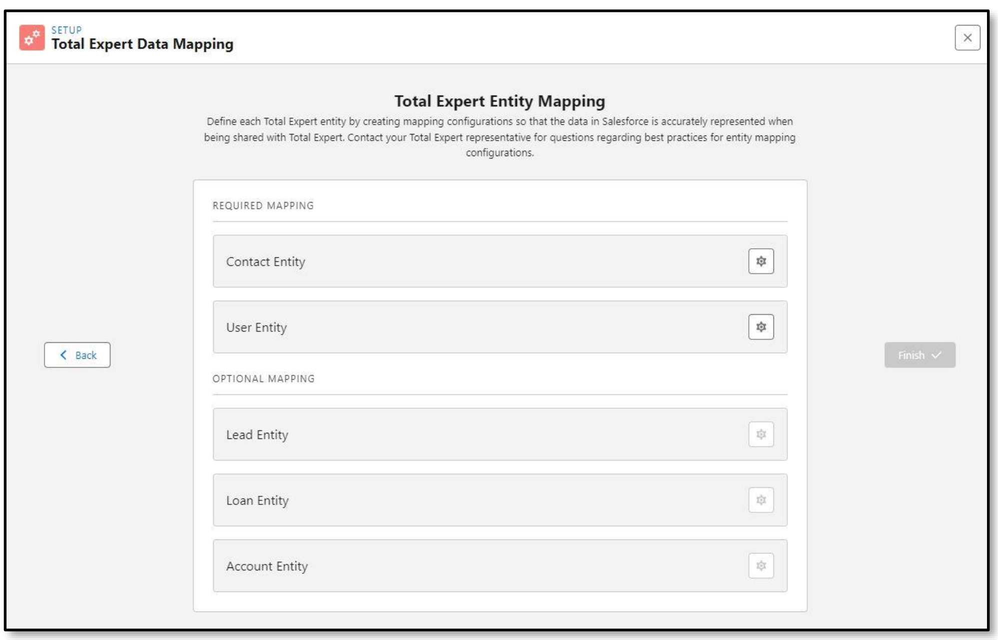
You are returned to the Total Expert Setup Assistant.

Data Mapping

1. Click the **Start** button.



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.

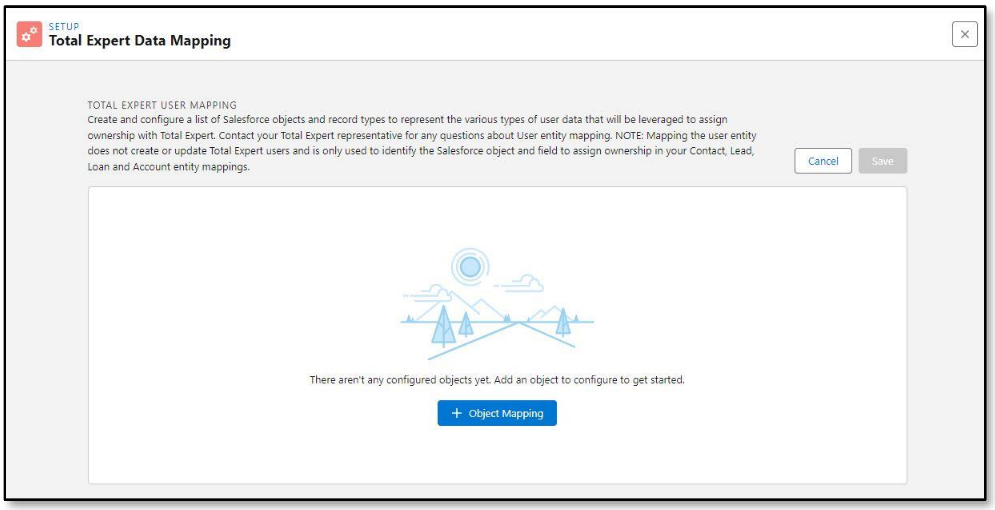


User Entity

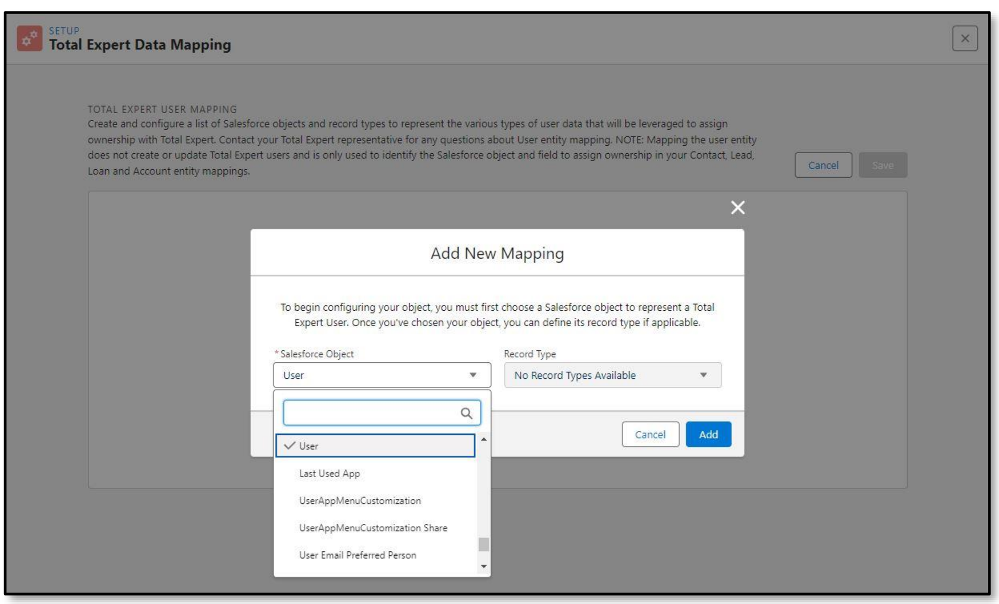
Users in Total Expert are employees of your organization and are required to define the explicit owner of a contact, lead, loan, or account entity record that comes from Salesforce. Using Total Expert for Salesforce, you are required to configure what Salesforce object and field of that object you want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

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

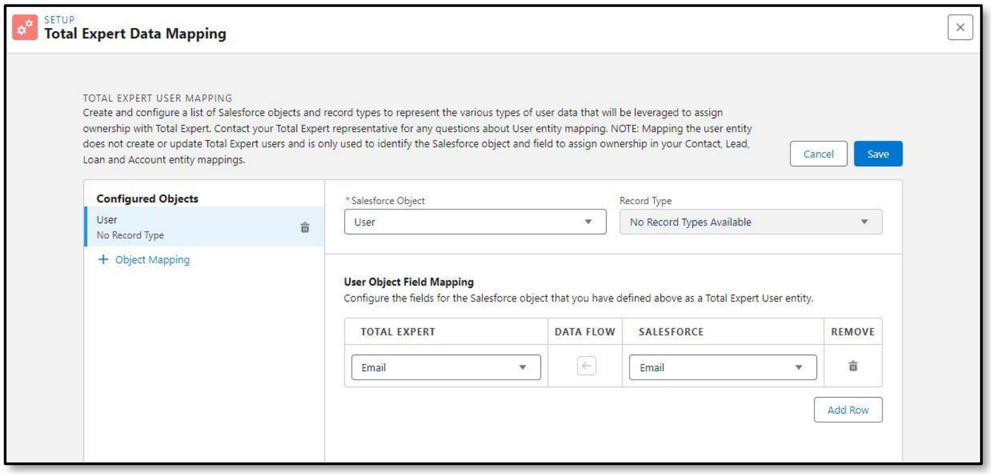
1. Click the gear icon to begin mapping the Salesforce object and individual field to be used for owner assignment in Total Expert.
2. You can map multiple Salesforce objects to be used when defining ownership. Click the **+ Object Mapping** button to begin configuring your field mapping.



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



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



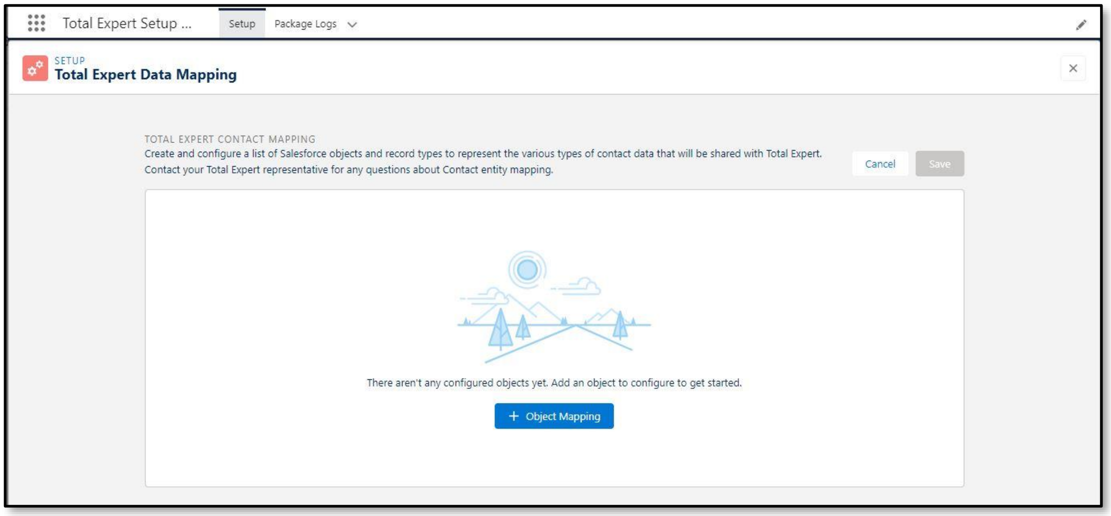
5. Complete your data mapping. The left column lists the user identifier field in Total Expert. Your options are **Email**, **External ID**, or **Username**.
6. In the 3rd column, select the corresponding field from Salesforce.
    a. The value in that field of the Salesforce record will be used to assign 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.

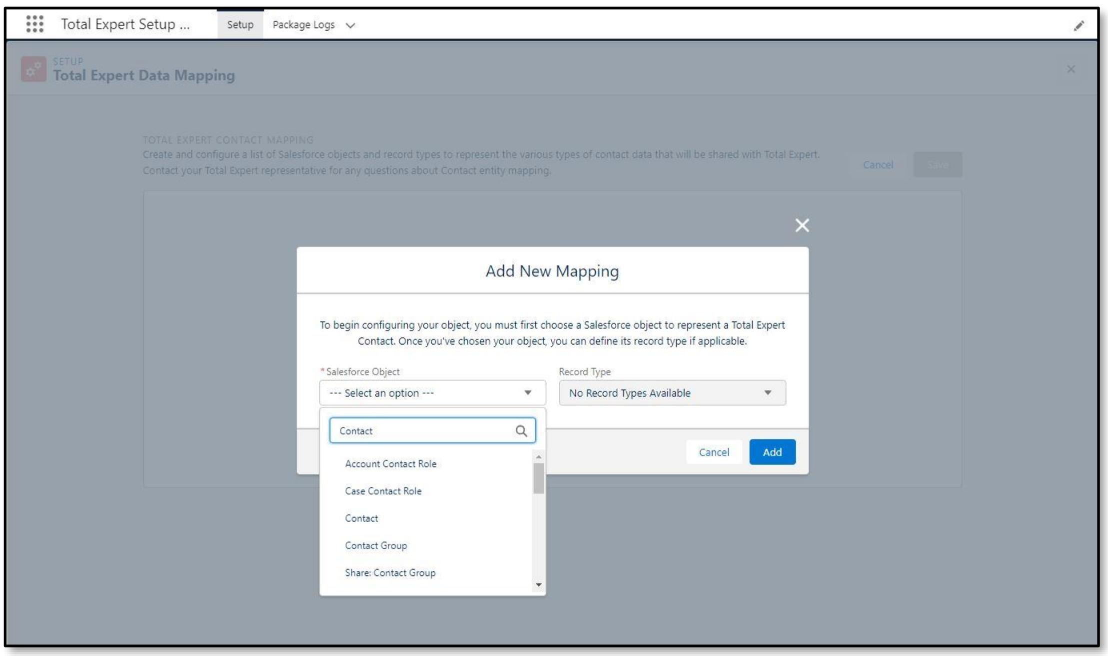
Contact Entity

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.

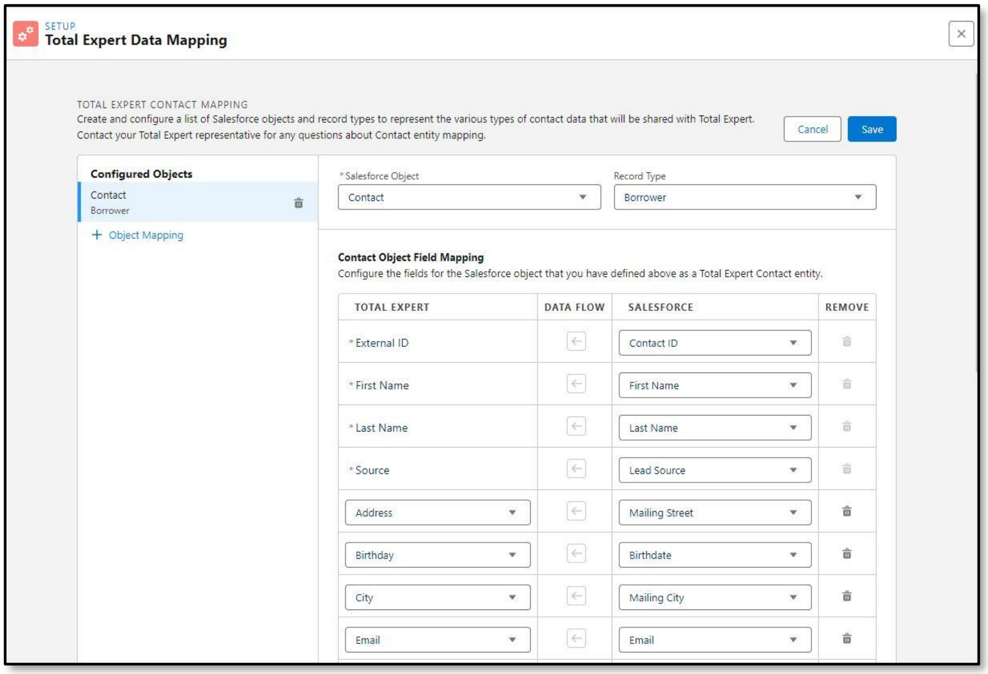
1. Click the gear icon to begin mapping the Salesforce object and individual fields with Total Expert.
2. You can map multiple Salesforce objects to sync with Total Expert as contacts. Click the **+ Object Mapping** button to begin configuring your field mapping.



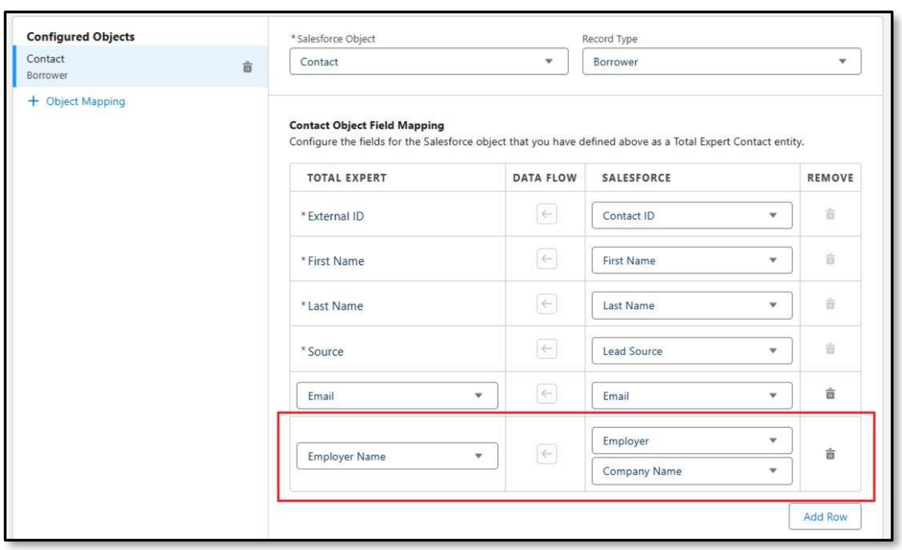
3. Select the first **Salesforce Object** and **Record Type** you want to sync with Total Expert as a contact.



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

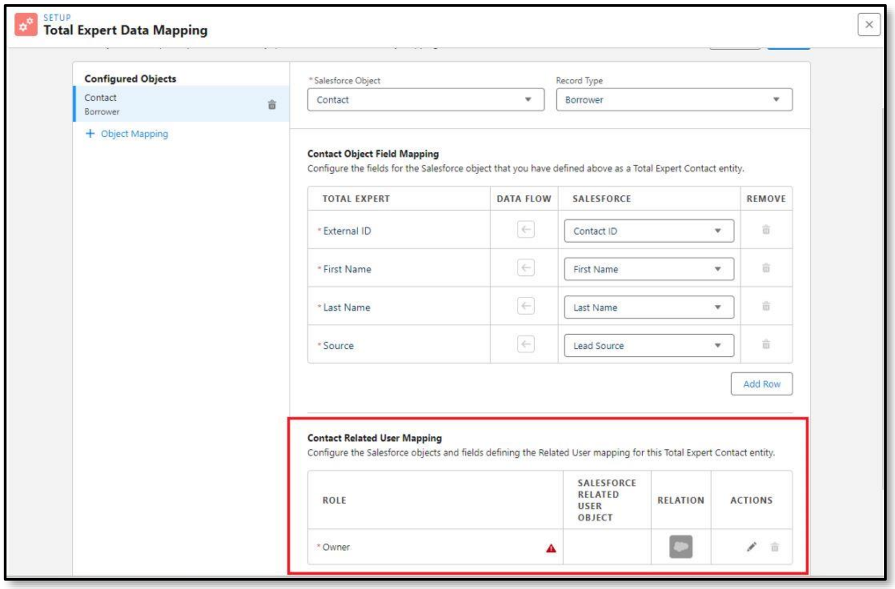


5. Complete your data mapping. The left column lists the names of contact fields in Total Expert. The second column indicates the data flow direction between Total Expert and Salesforce. In the third column, select the corresponding fields from Salesforce.
    a. You can add or remove rows from the mapping 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.

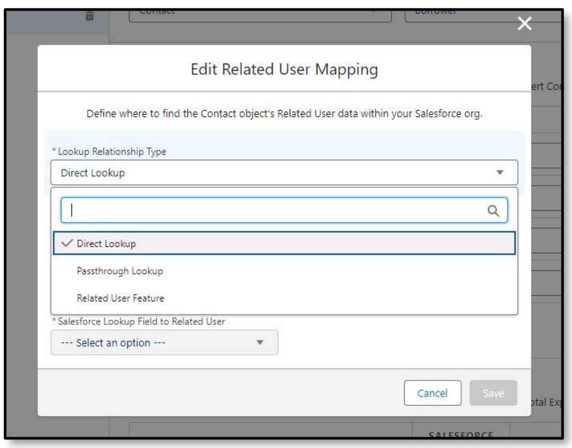


Note
When mapping a lookup field, the API Field Name in the object field configuration must match the related object name to see the related object fields available.

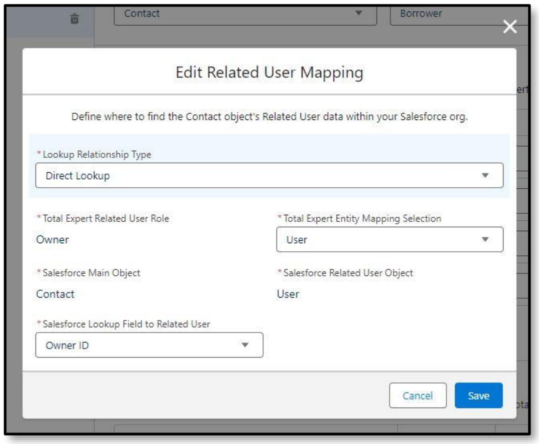
6. Complete your Contact Related User Mapping. This is where you assign your User Entity mapping to define ownership of the record when it syncs to Total Expert.



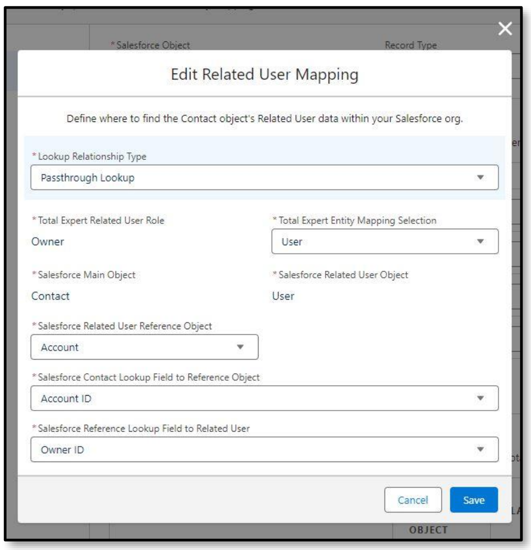
a. In the Lookup Relationship Type drop-down list, select **Direct Lookup**, **Passthrough Lookup**, or **Related User Feature**.



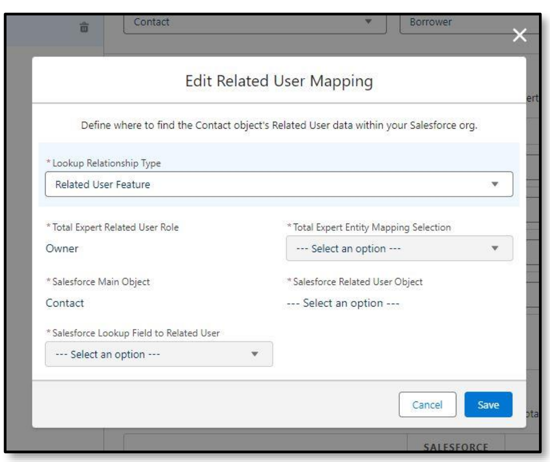
1. **Direct Lookup** (commonly used) – This uses a lookup field on the Salesforce record to assign ownership. The value of the field mapped in the User entity is passed as Owner to Total Expert.



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.



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



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.

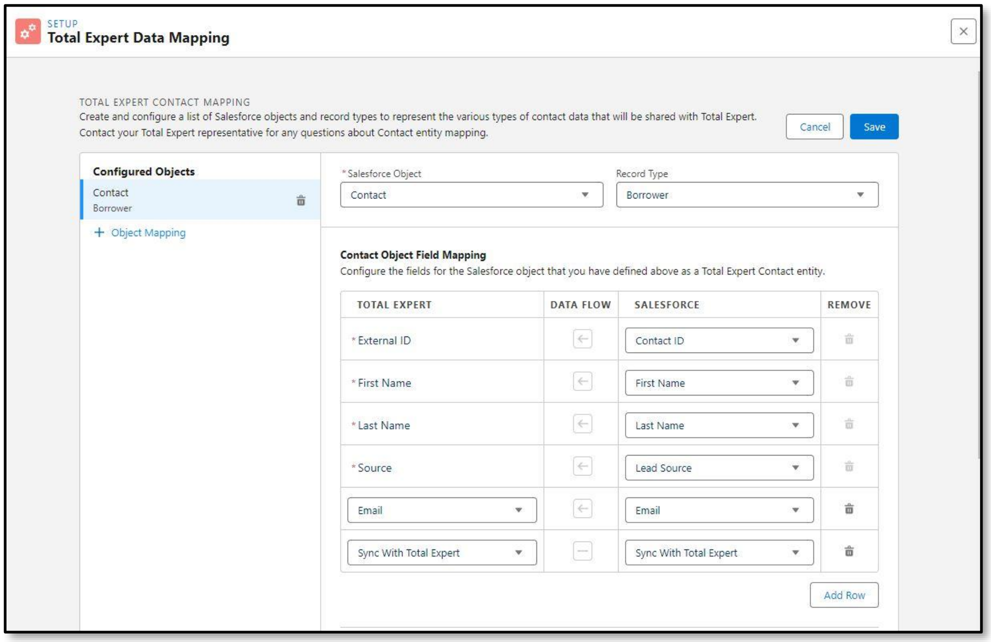
Occasionally, the data types from your Salesforce field may not match the Total Expert field. When this occurs, it is best practice to create custom fields in Salesforce with the appropriate data types and include logic to manipulate the data as Total Expert would expect. For example, a Boolean in Salesforce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



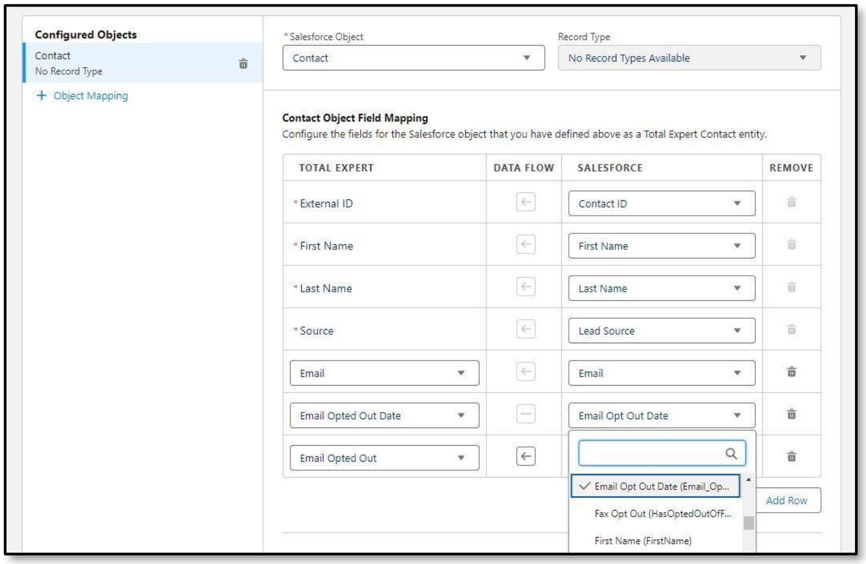
8. When you have mapped all the contact fields you want to use, click the **Save** button.

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 *re*subscribes from Salesforce to Total Expert. SMS opt-out information and email resubscribes can be shared from Total Expert to Salesforce.

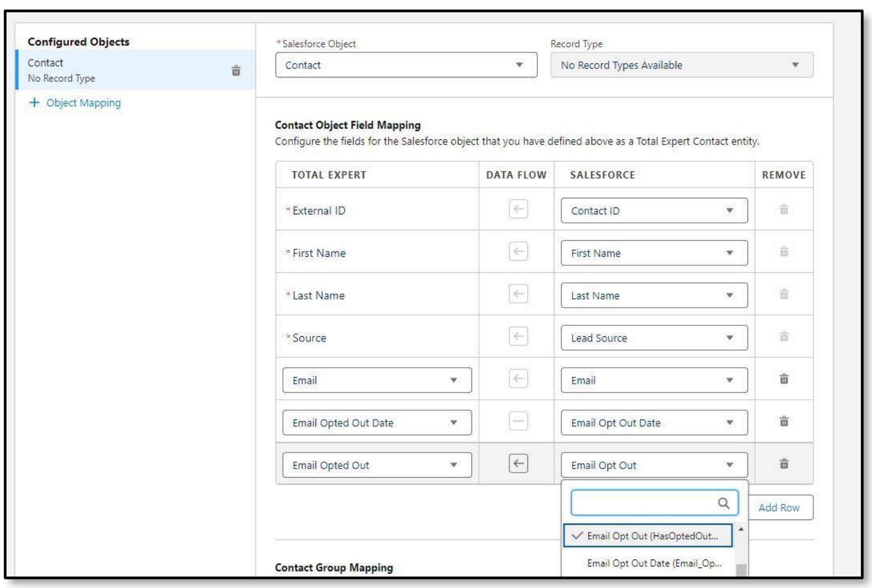
1. If you want to share email unsubscribes from Salesforce to Total Expert, you will be required to map a Salesforce date/time field specific to when the email unsubscribe was received. This is used to check when an unsubscribe is received so that redundant unsubscribes are not made, and to avoid overwriting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



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.

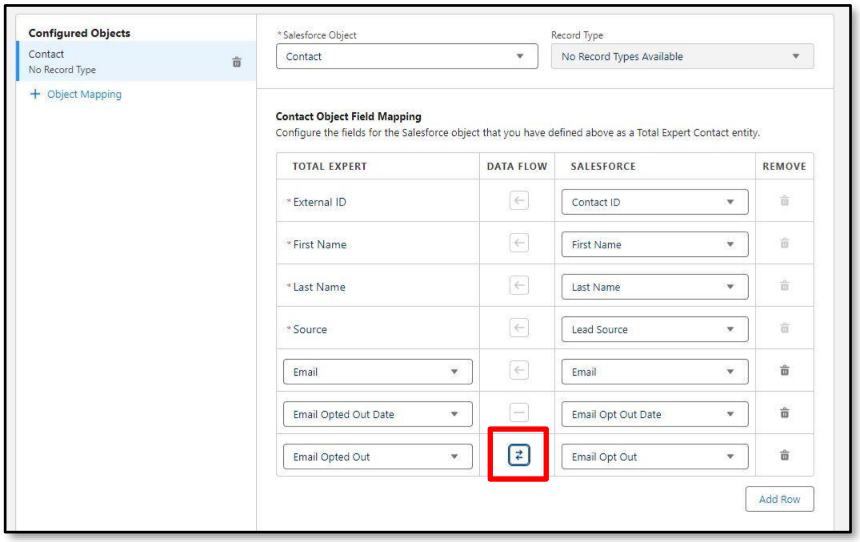
2. You will then map your email unsubscribe field in Salesforce to the Total Expert **Email Opted Out** option.

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.



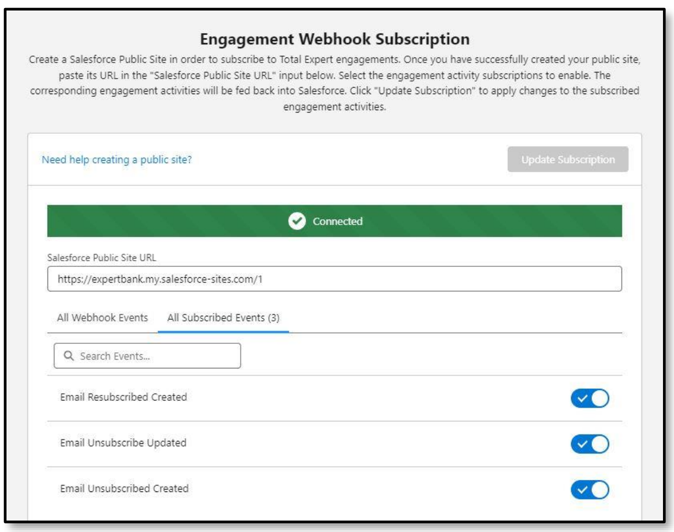
3. Between the fields is the data flow indicator. By clicking it, you can make this feed from Salesforce to Total Expert, Total Expert to Salesforce, or both (bi-directional sync).

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



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.

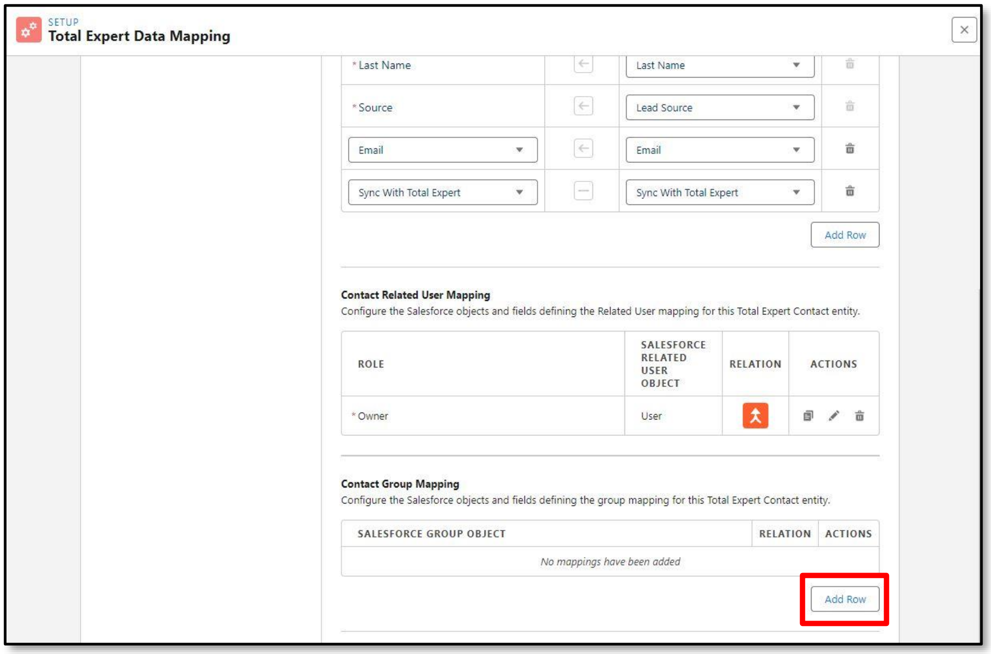


Contact Grouping

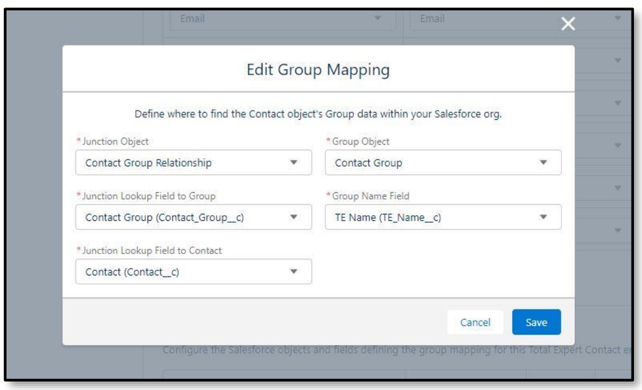
Contact groups in Total Expert are used to categorize contacts and trigger specific marketing actions in journeys.

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.



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.



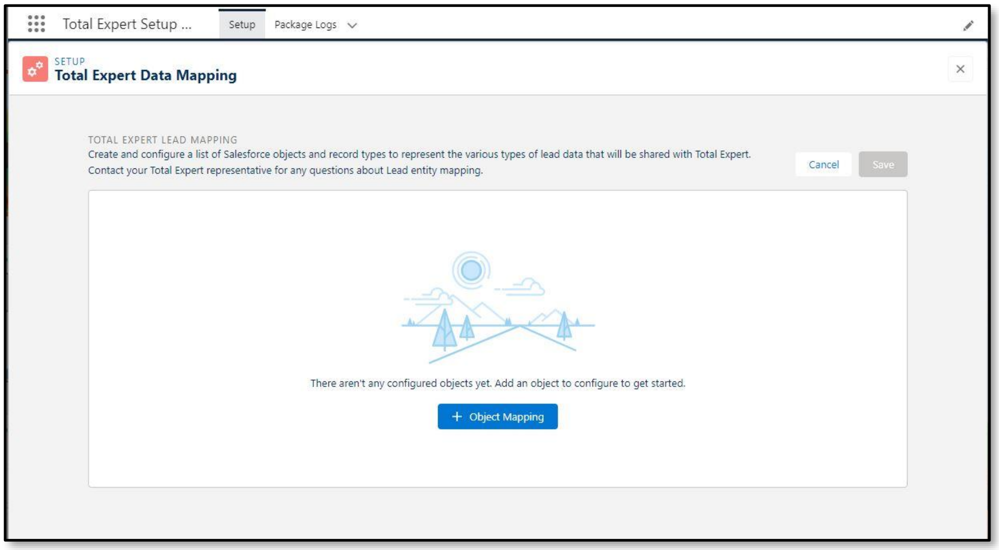
3. Select the object that represents the group, the lookup field in the Junction object for the group, the field in the group object to be used as the name, and finally the lookup field for the contact.

Lead Entity

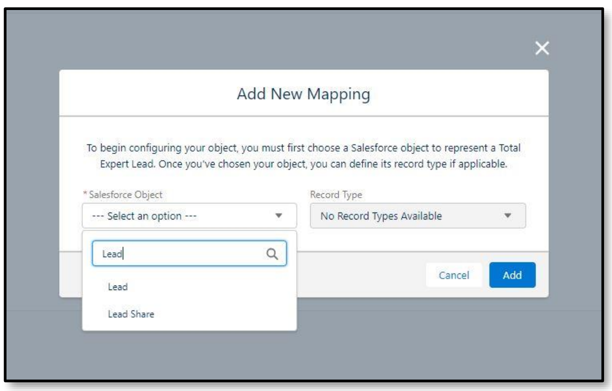
The Total Expert Lead entity represents a contact's interaction with your organization from a specified source, and indicates an opportunity.

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.

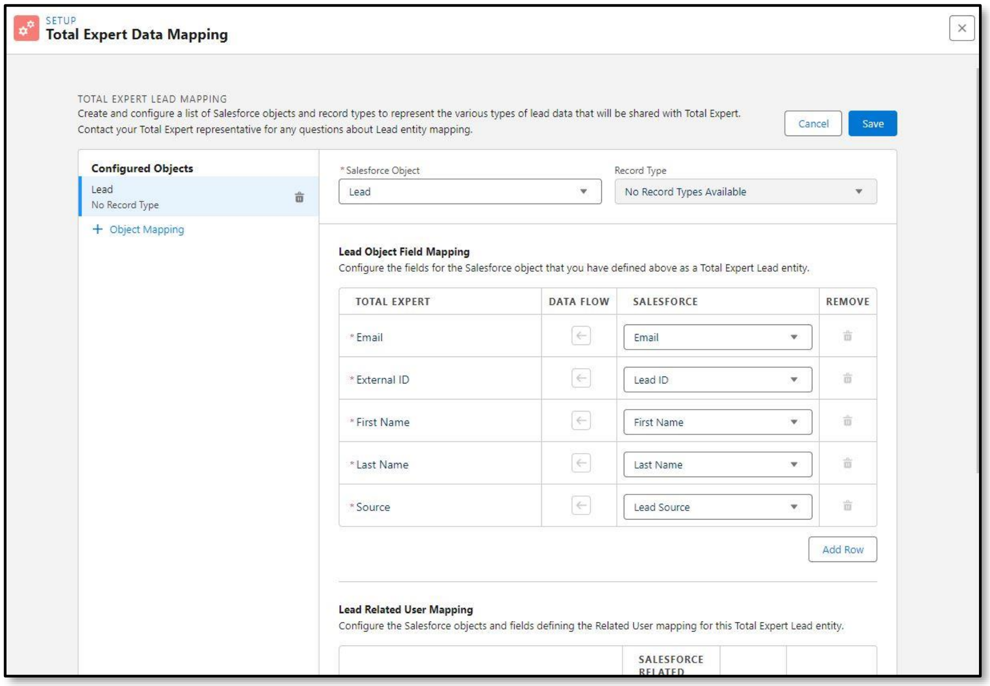
1. Similarly to contacts, you can map many Salesforce objects to be synced with Total Expert as leads. Click the **+ Object Mapping** button to begin.



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



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



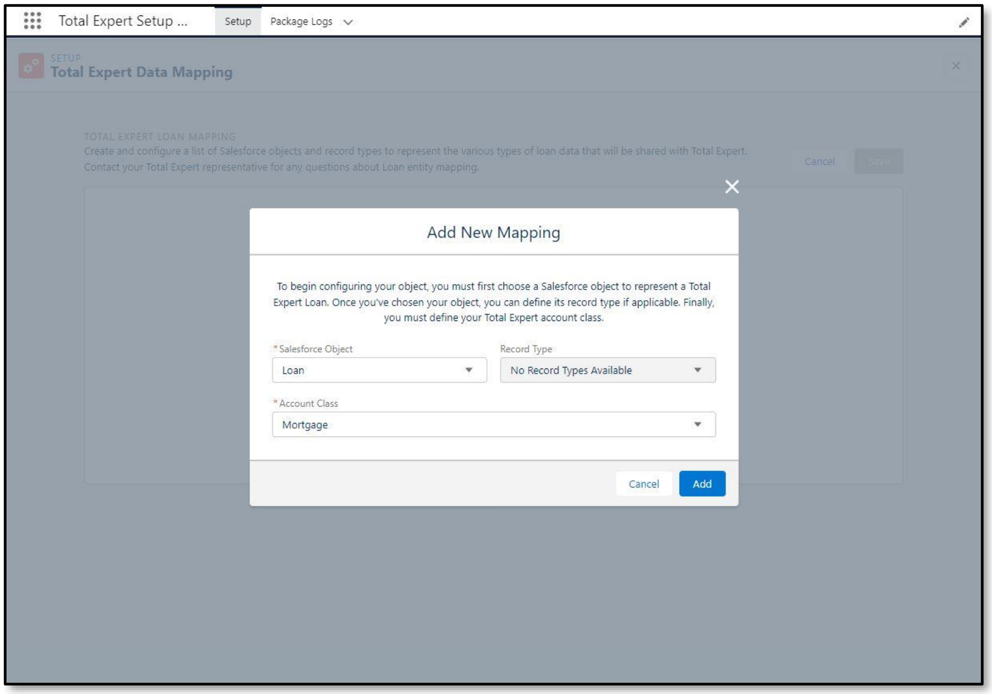
Just like for the Contact entity, the Lead Related User Mapping is required for the Lead entity.

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.

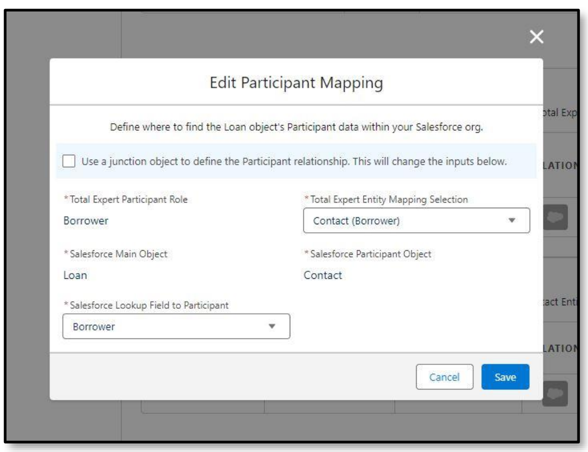
Loan Entity

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.



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

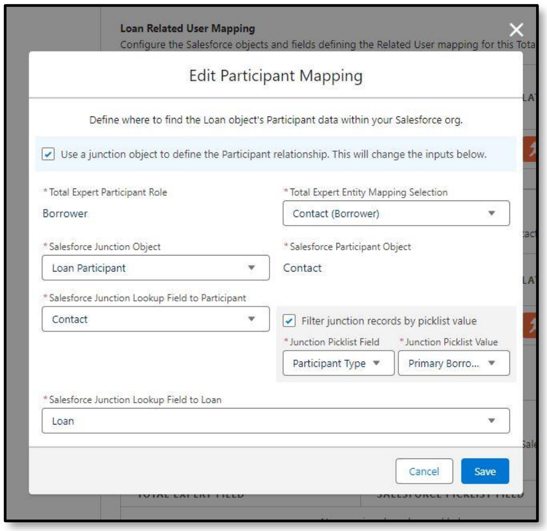
When syncing the Loan entity to Total Expert, the application uses a lookup field to determine the participant details to be included. When using these details, first name, last name, source, and either email address, phone number or full mailing address (street address, city, state, and ZIP code) must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



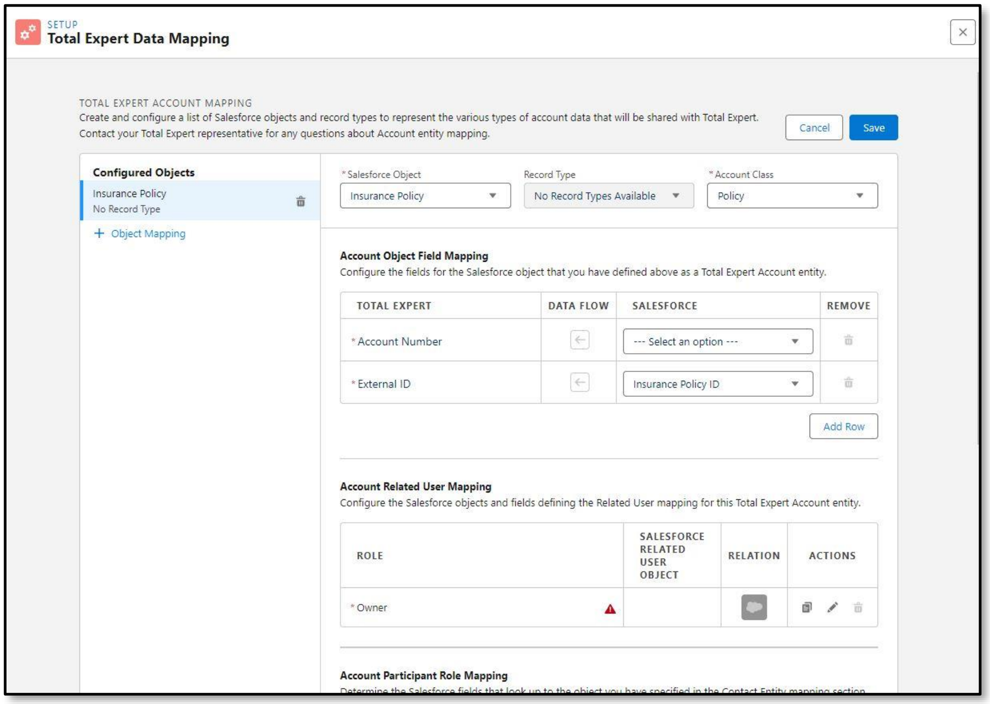
Since you can configure many contact mappings, you must select the field mapping you want to use when sharing the participant with Total Expert.

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.



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.

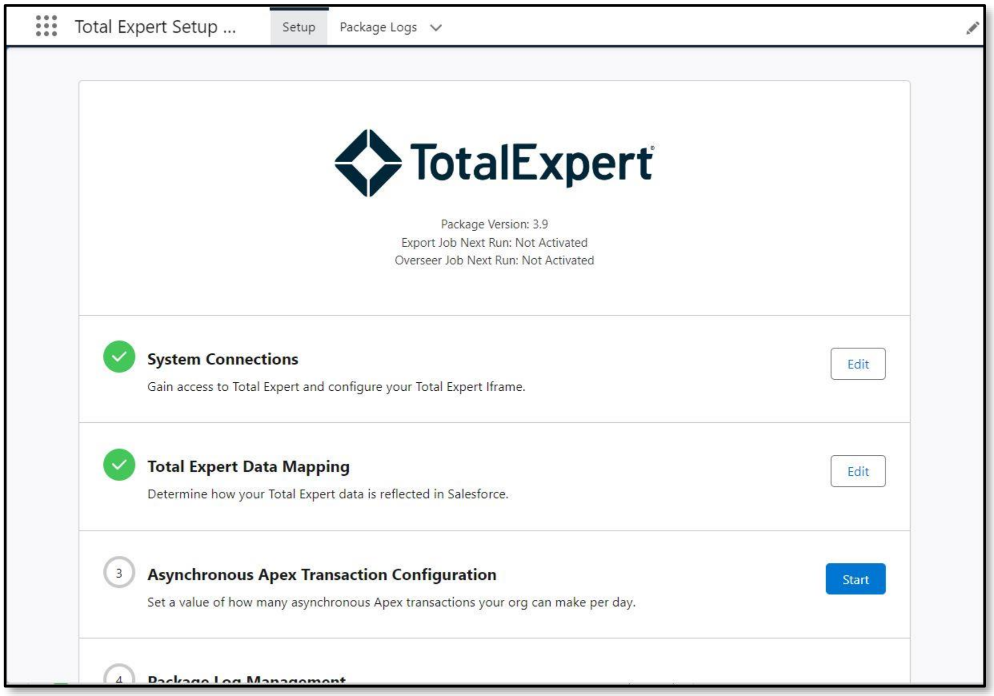
When syncing the participant to Total Expert, an attempt to create a contact record is made and follows Total Expert's deduplication logic, but the full contact payload will be passed including custom fields and contact groups.

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.

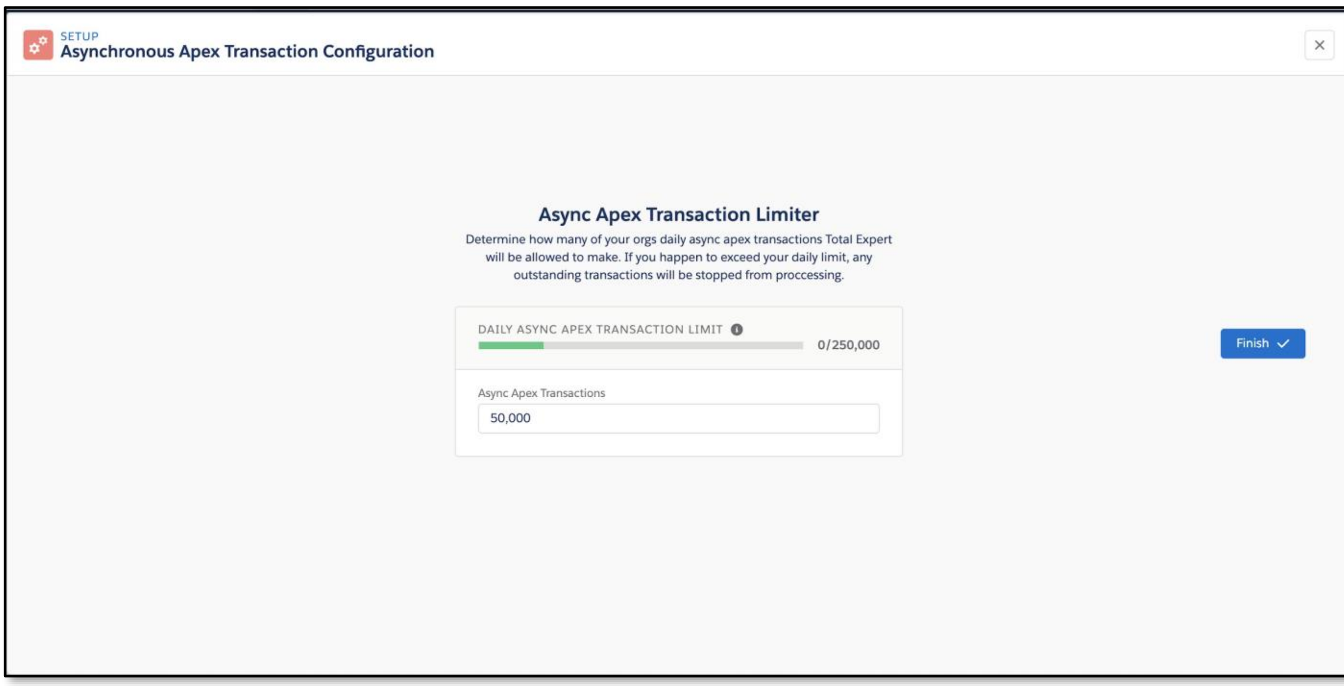
Once you have mapped the objects you wish to complete, click the **Finish** button. You are returned to the Total Expert Setup Assistant.

Asynchronous Transactions

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



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



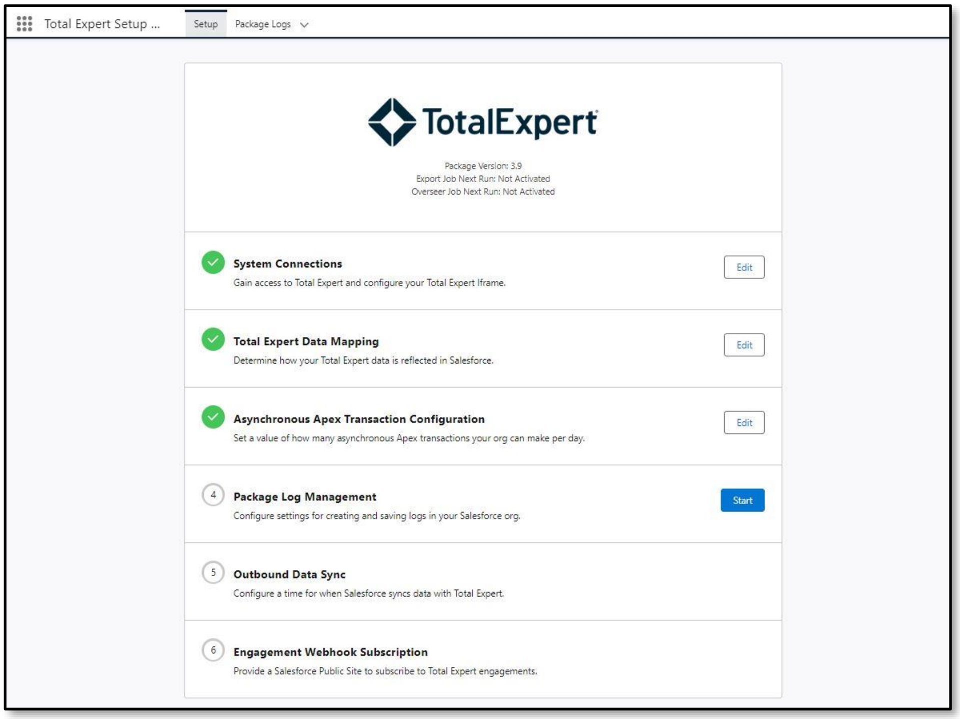
3. Click the **Finish** button.

You are returned to the Total Expert Setup Assistant.

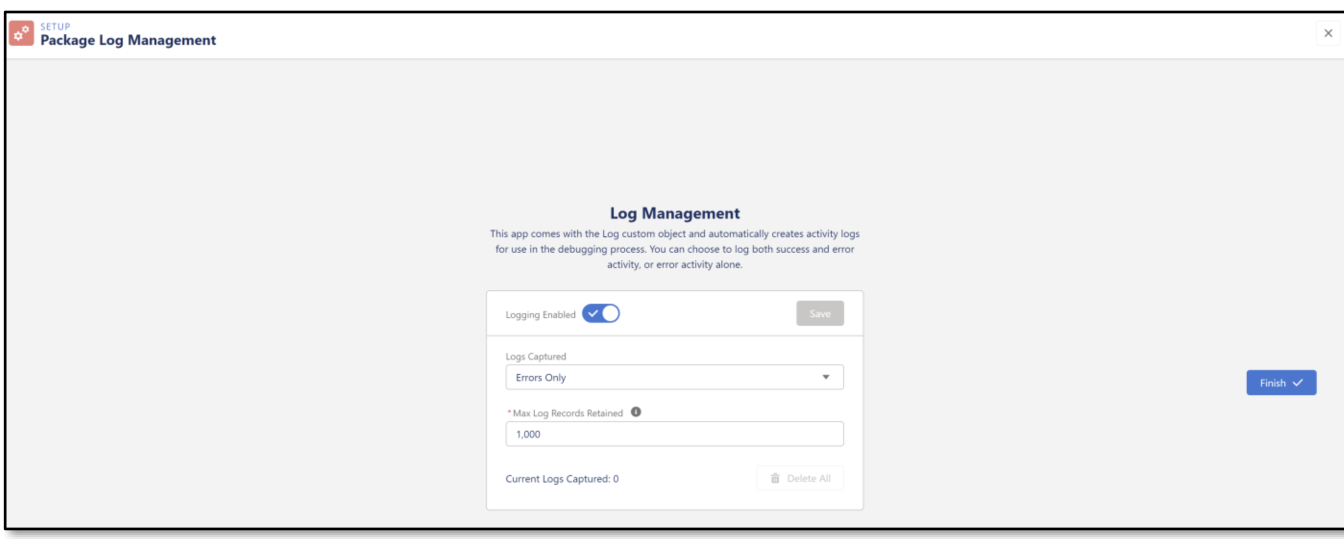
Package Log Management

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

1. Click the **Start** button.



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.

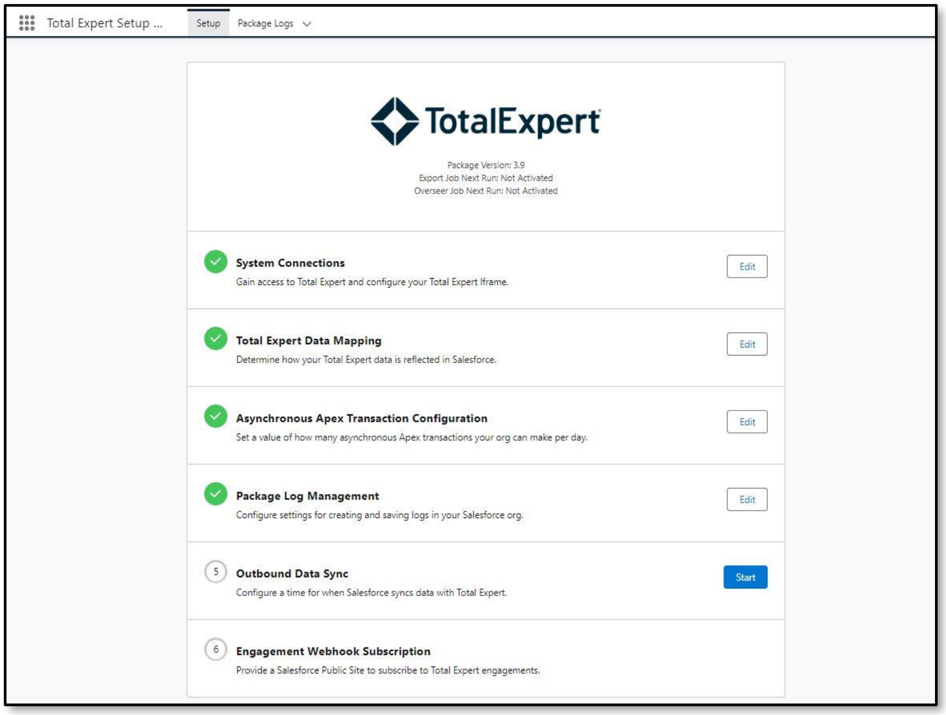


TOTAL EXPERT

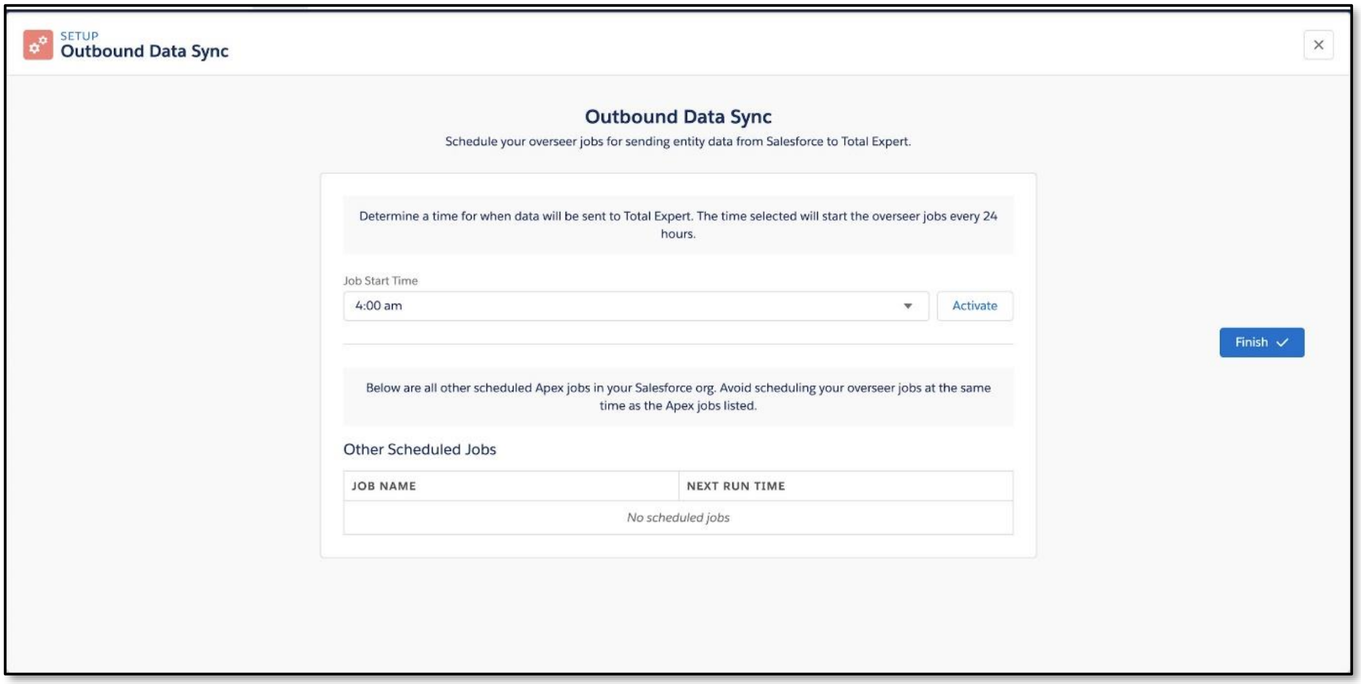
Outbound Sync

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.



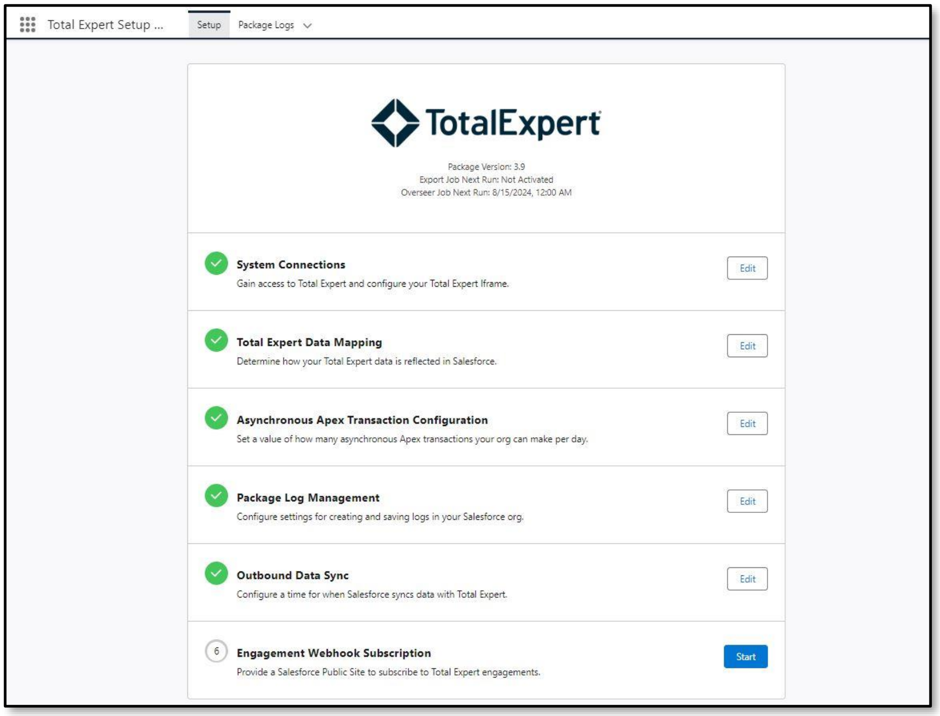
4. Click the **Finish** button.

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.

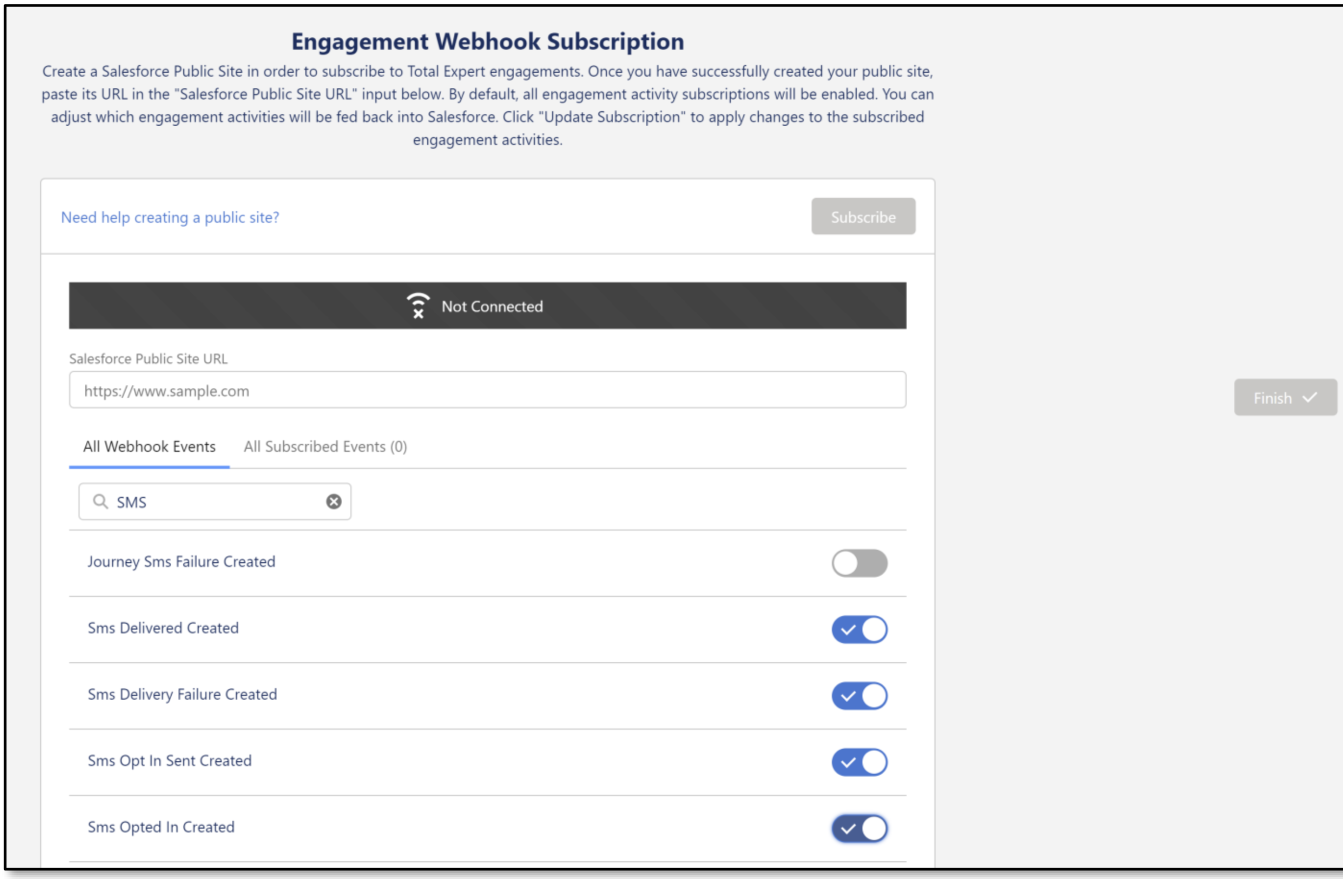
1. Click the **Start** button.



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.

TOTAL EXPERT

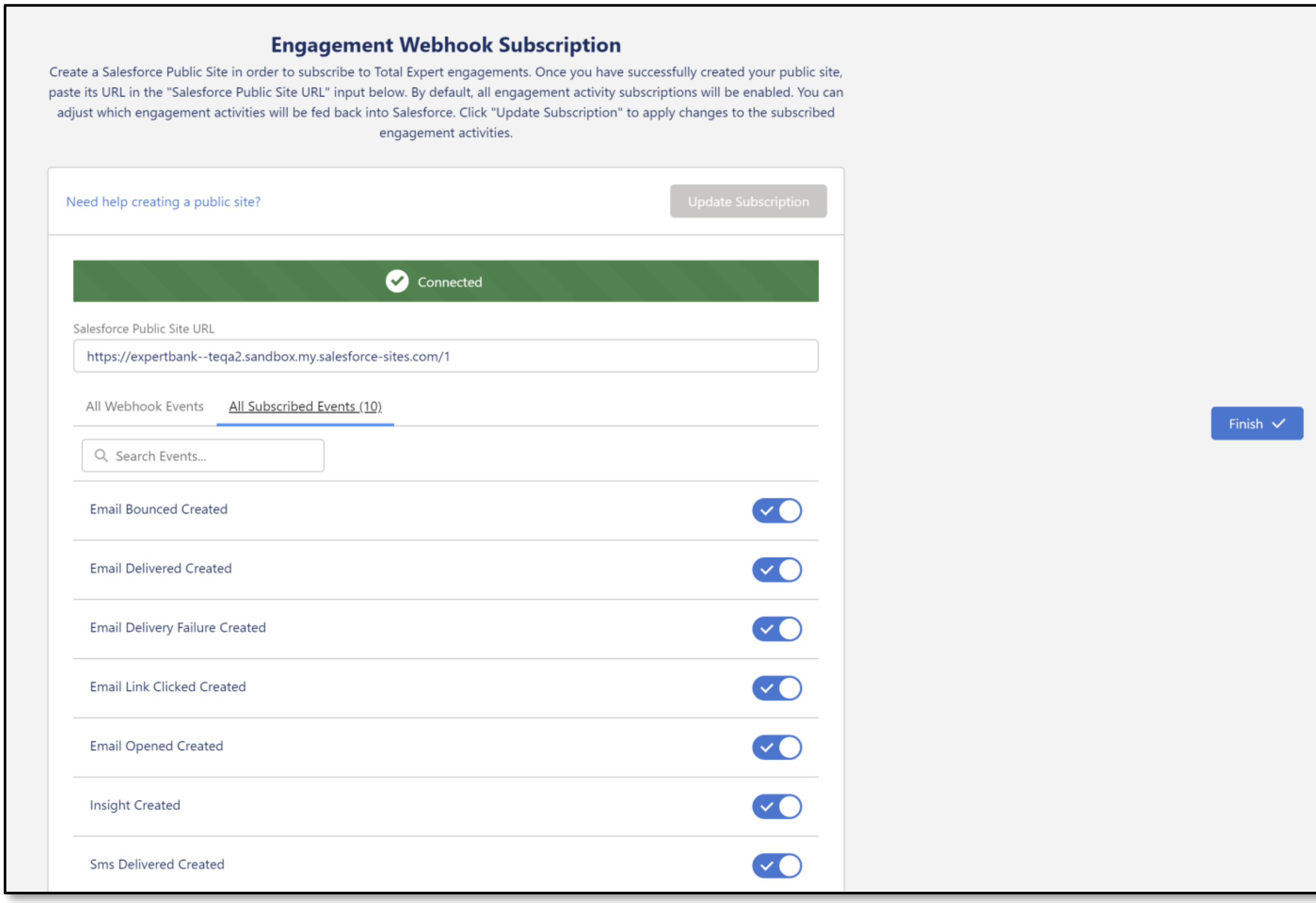


3. Under **All Webhook Events**, you can search for any available webhook with Total Expert.
4. Subscribe to a webhook by clicking the toggle switch to move it to the On position.

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.

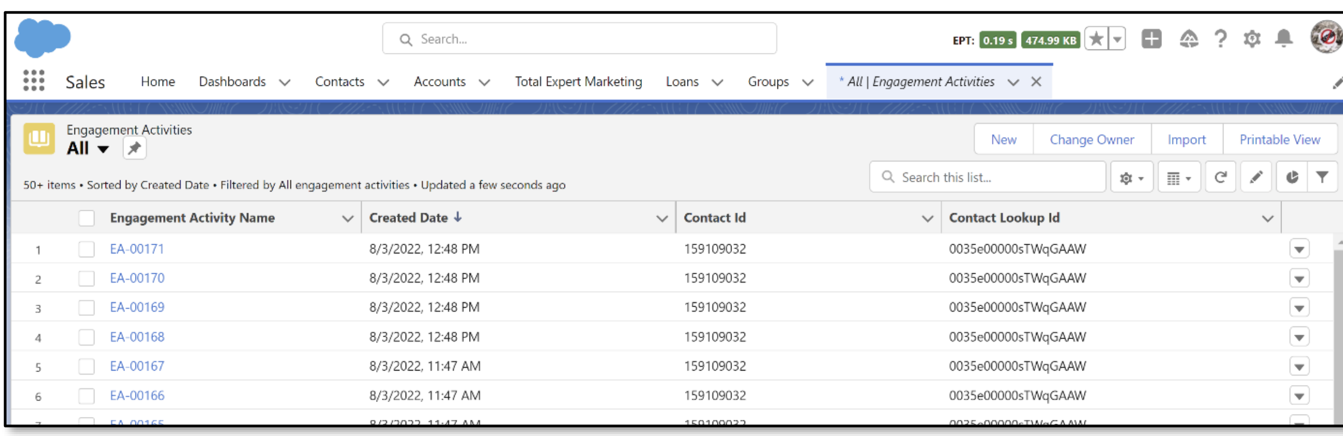


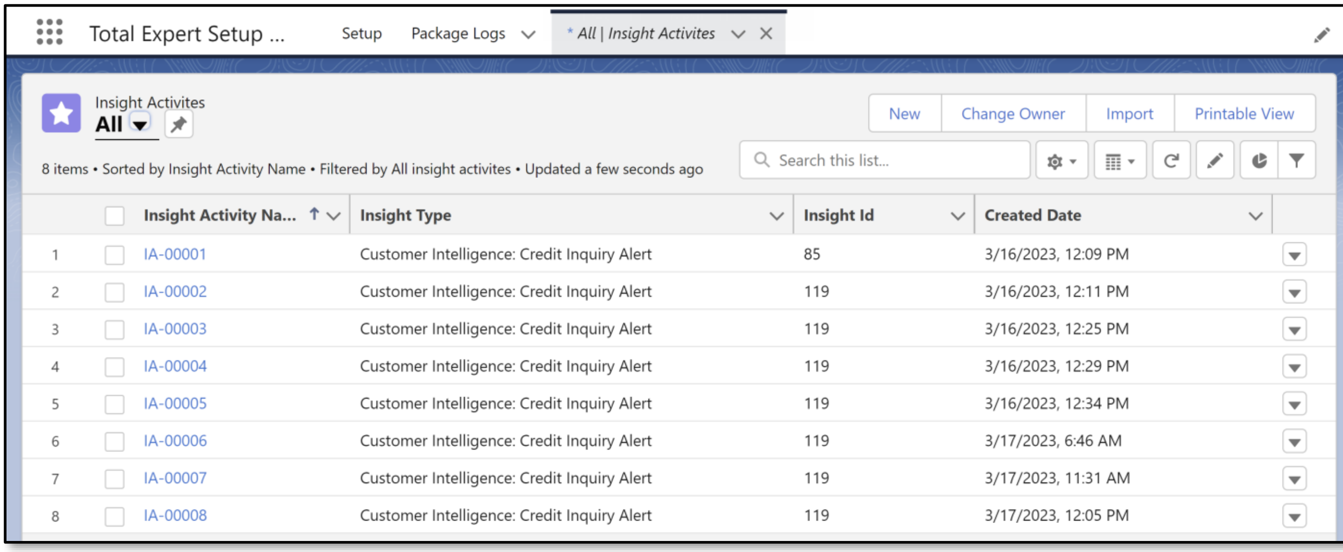
7. Click the **Finish** button.

You are returned to the Total Expert Setup Assistant.

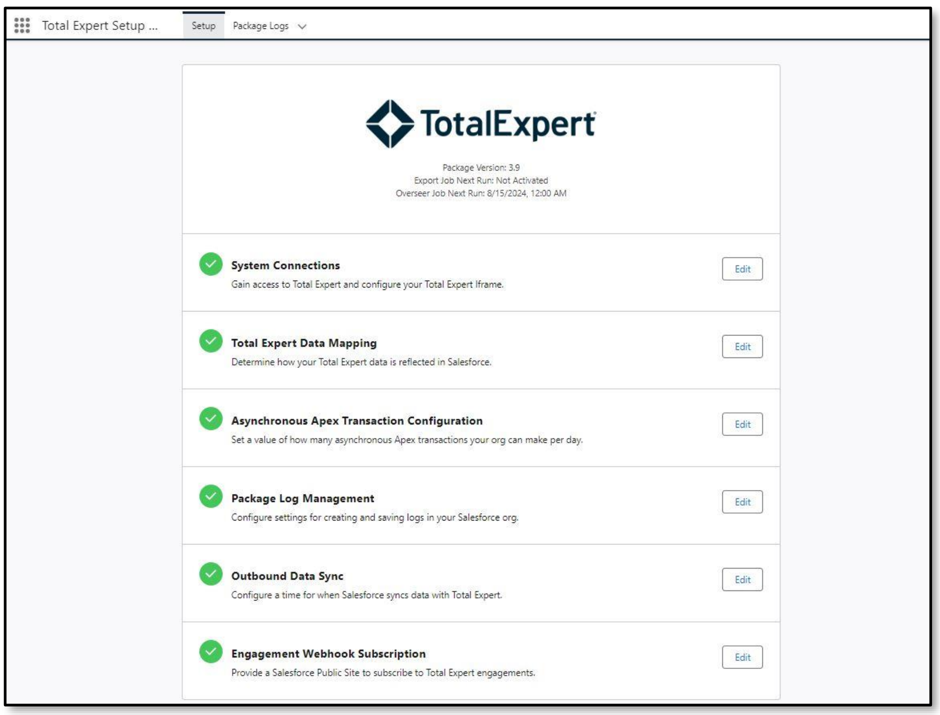
When viewing notifications:

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.





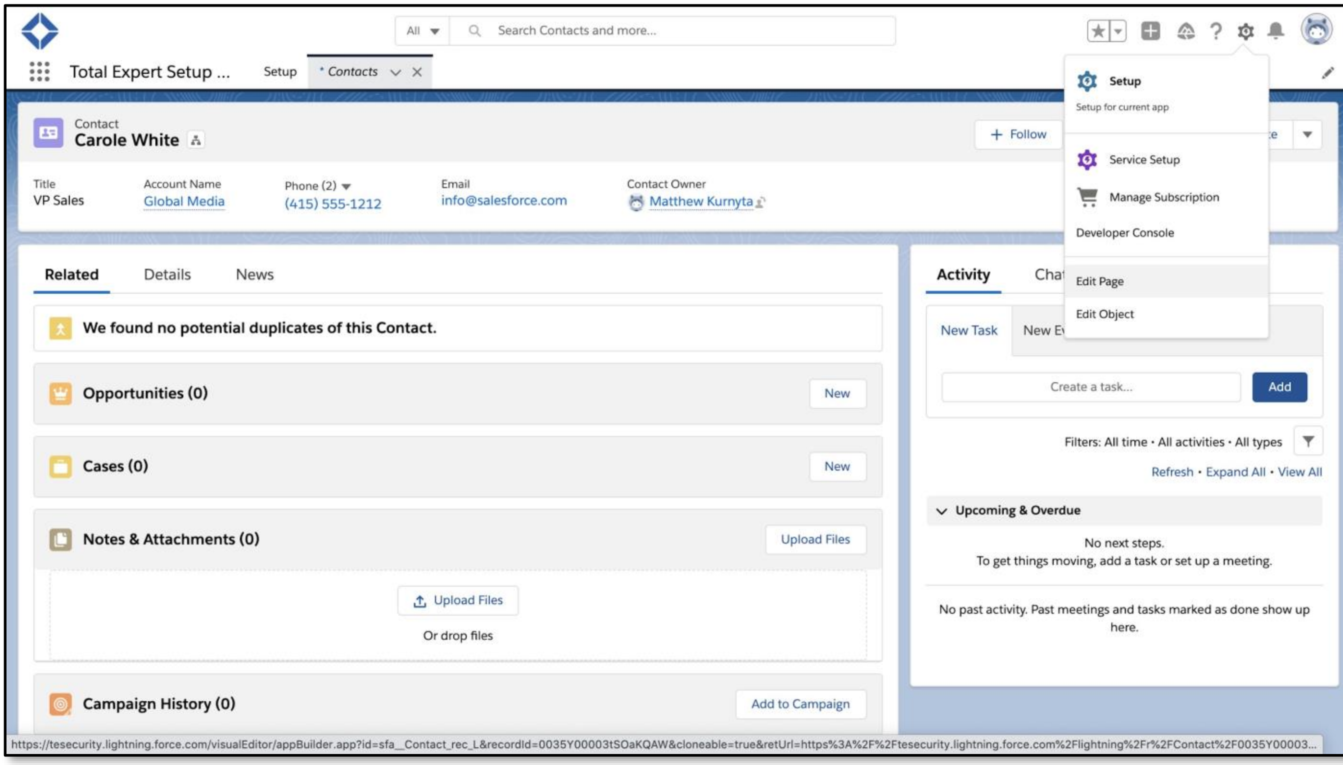
You are returned to the Total Expert Setup Assistant. When all the sections show a checkmark, installation is complete.



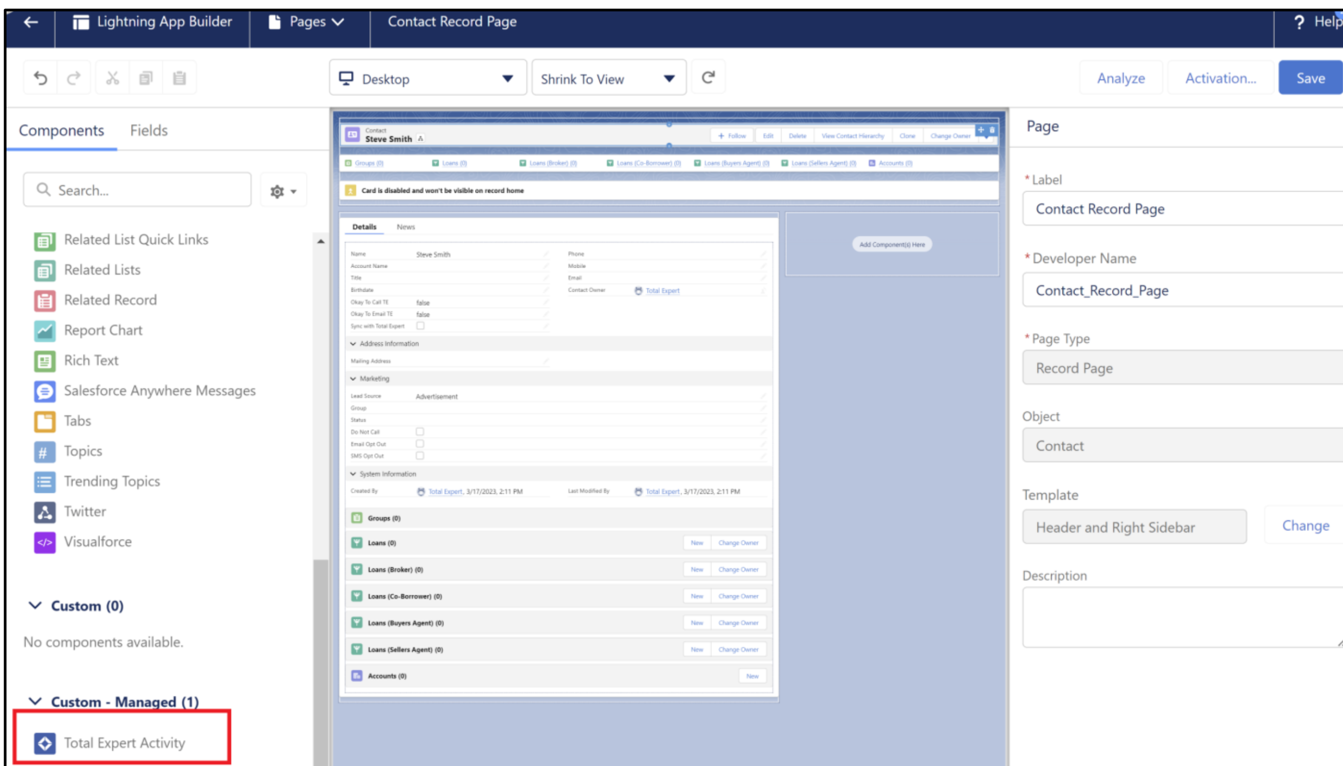
Lightning Components

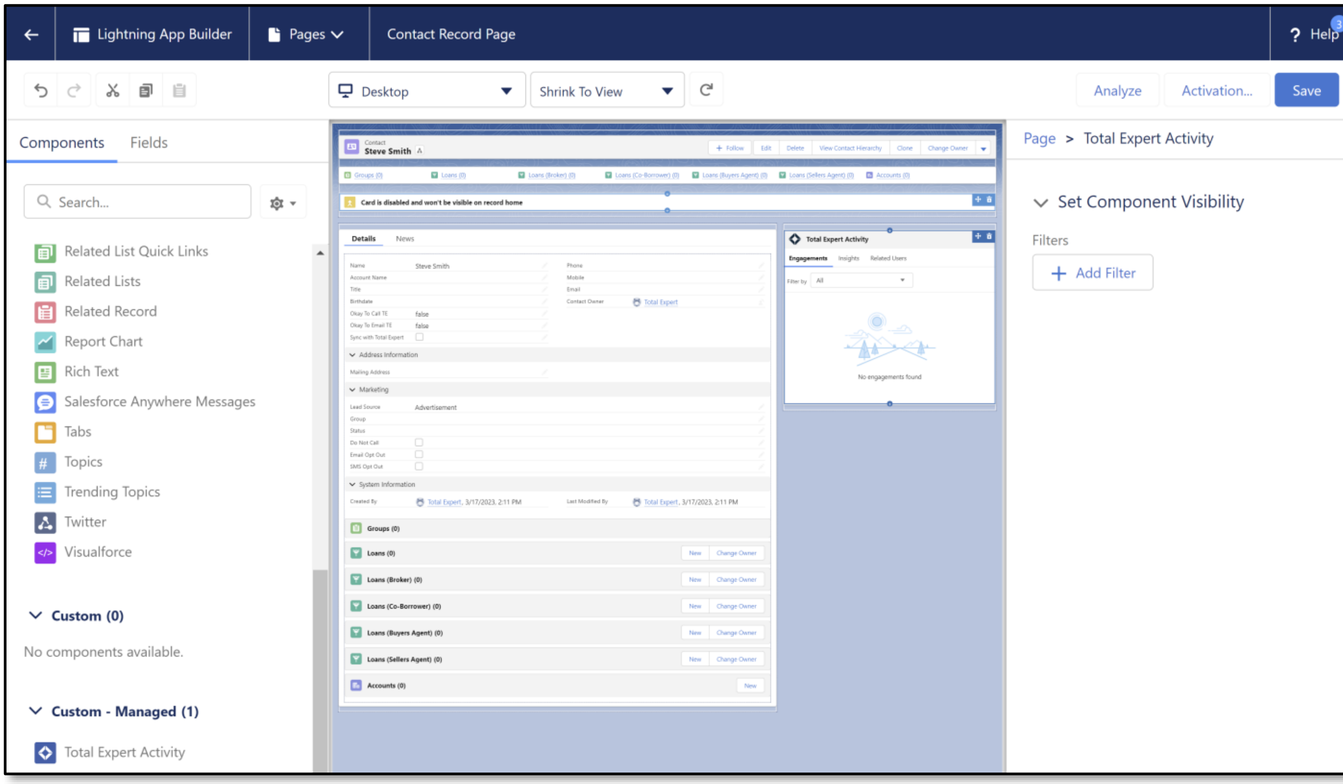
There is a Total Expert Activity timeline Lightning component that you can add to record pages.

1. From the settings menu, select **Edit Page**.

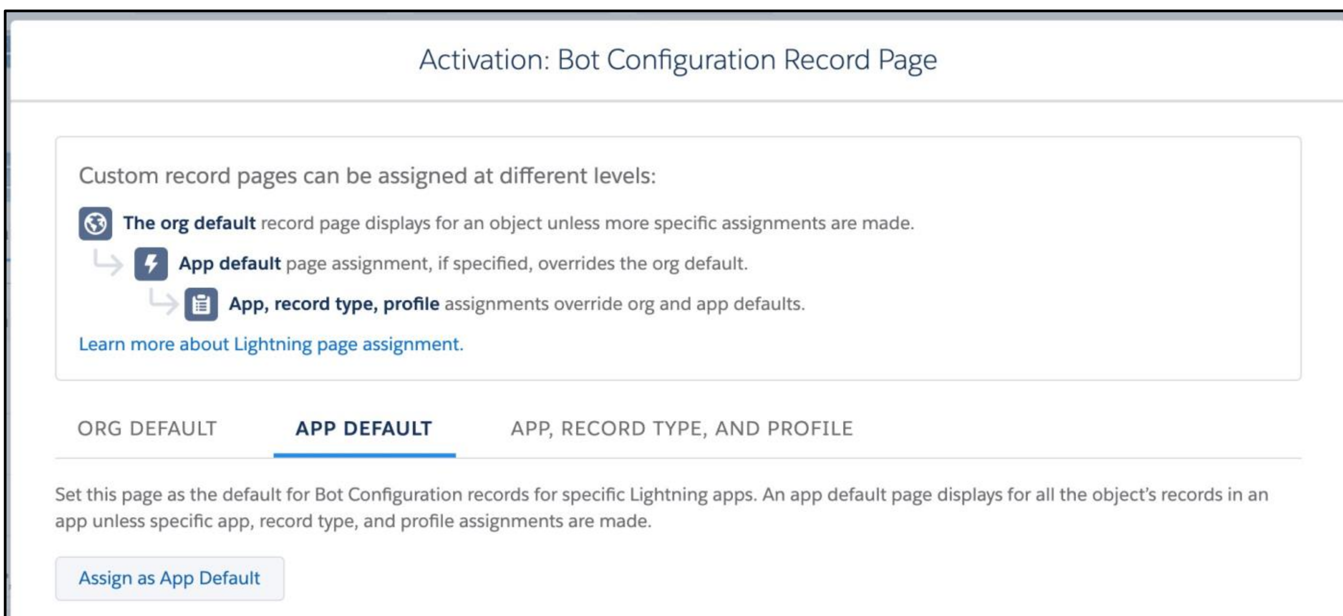


2. Drag and drop the **Total Expert Activity** component from the Custom – Managed section onto the main panel.





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.



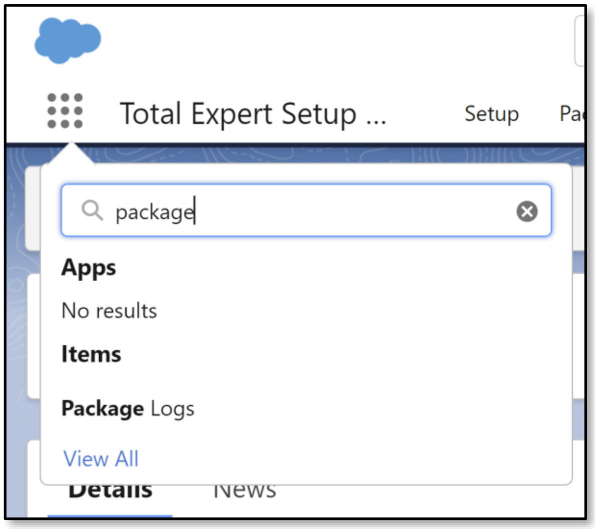
5. Click the **Save** button.
6. Click **Back** to see the edited record page.

Troubleshooting

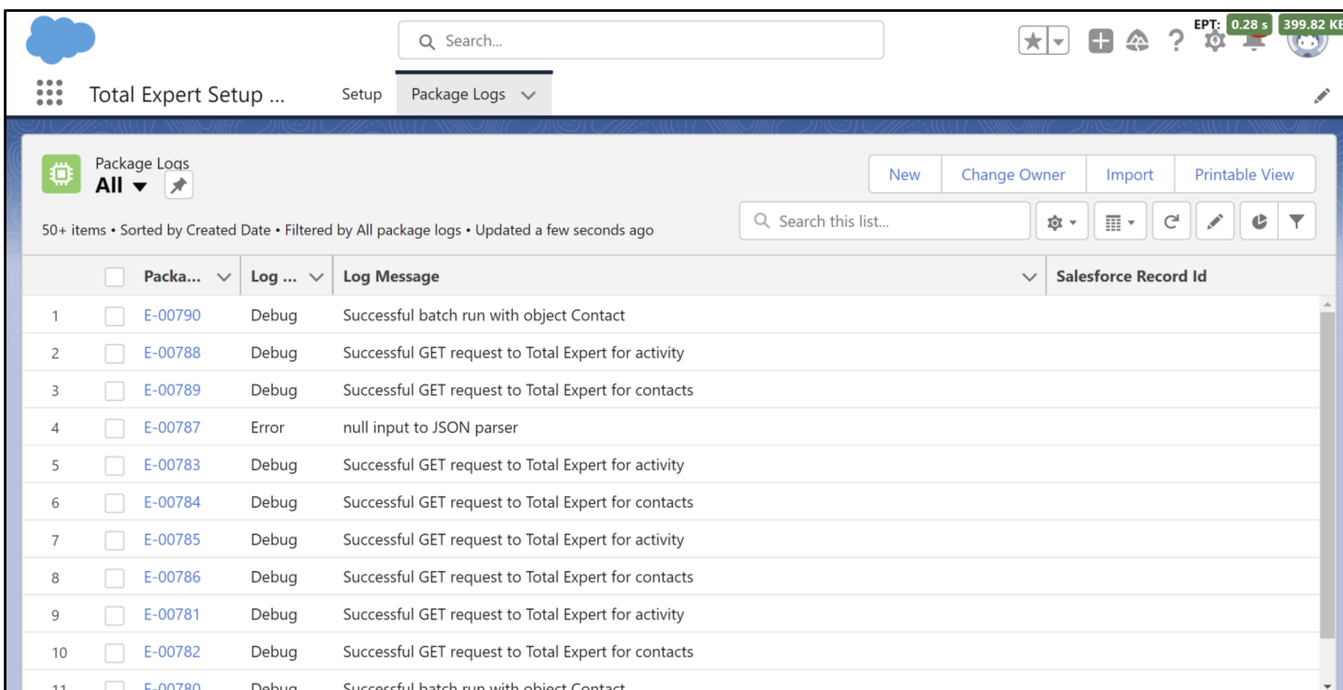
Error Log

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

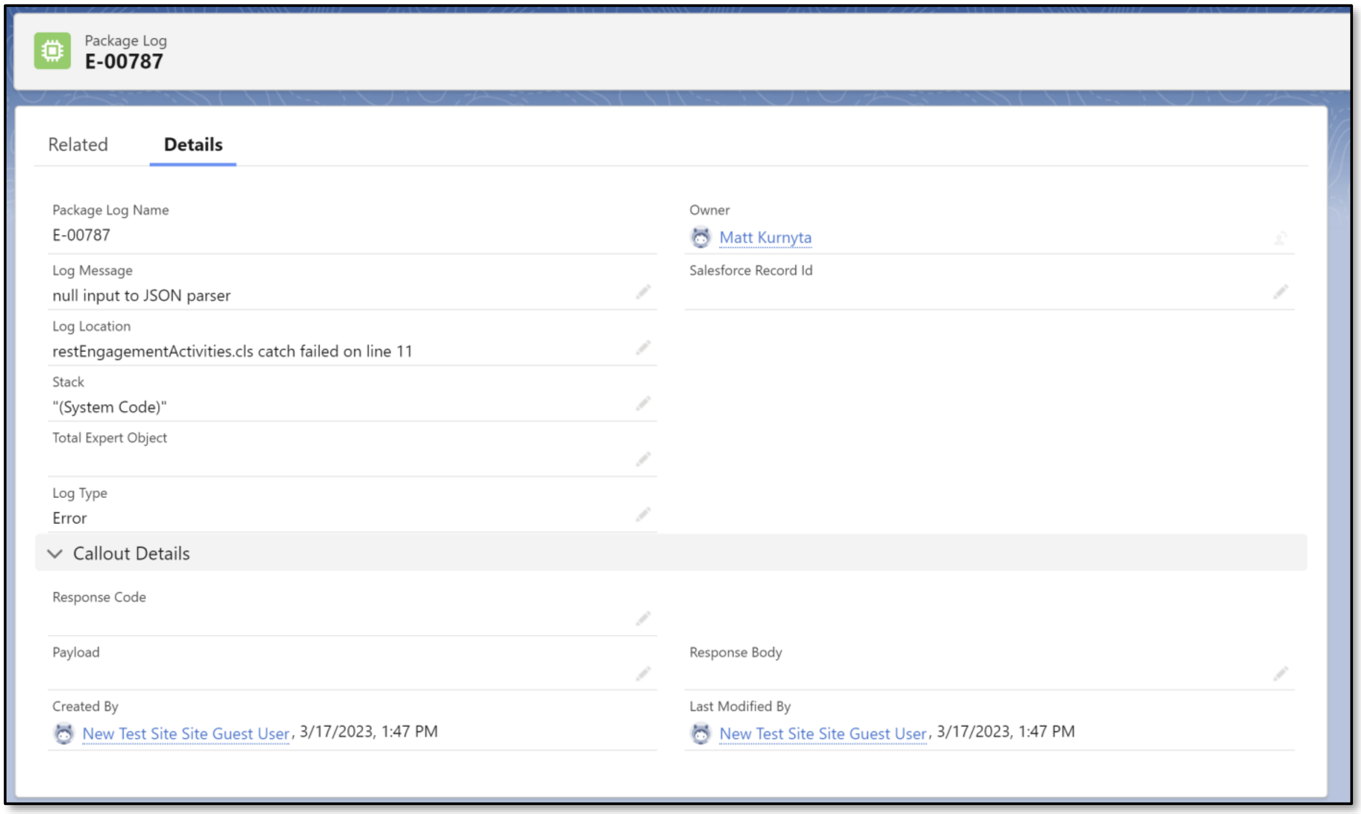
1. Select **Apps** and search for Package Logs.



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



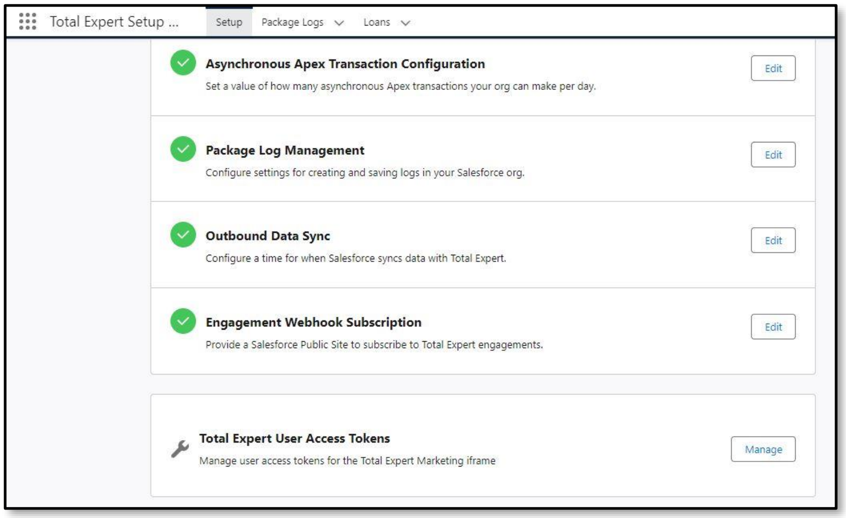
When reaching out to Total Expert for assistance and support, please include the details of the error log during your research.



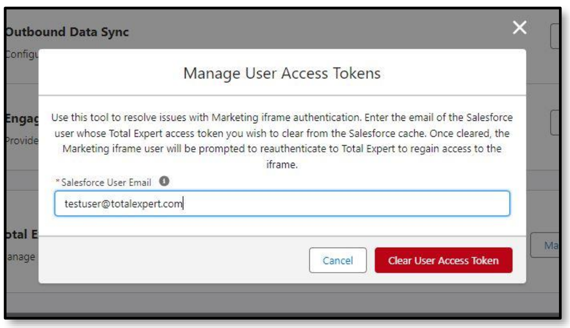
User Access Token Refresh

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.



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.

