



Salesforce Installation Guide

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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.



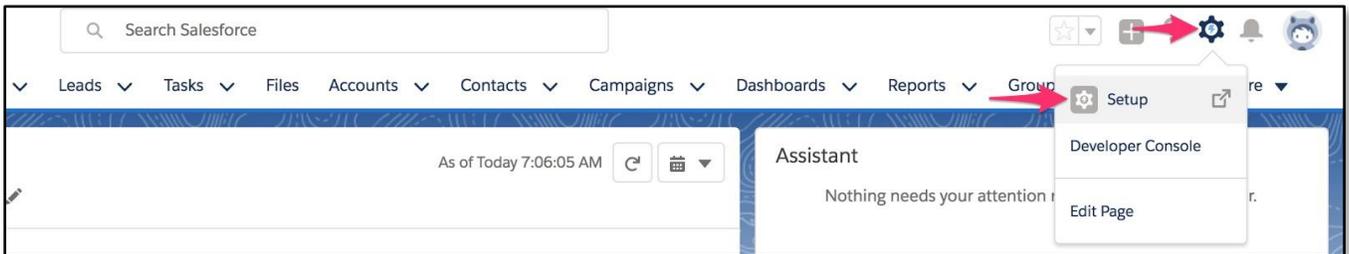
Introduction

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.



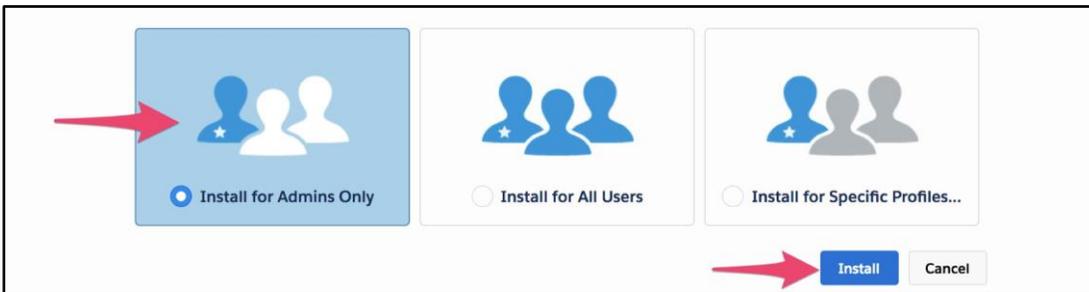
Installation

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.

The screenshot shows the Salesforce Setup interface for 'Sites'. The left sidebar contains navigation options like 'User Interface', 'Sites and Domains', 'Security', and 'CSP Trusted Sites'. The main content area is titled 'Sites' and includes a 'What is a Site?' section with explanatory text. Below the text is a diagram showing a 'Sample Domain Name' (MyCompany.force.com) branching into three 'Sample sites URLs': MyCompany.force.com/customers, MyCompany.force.com/developers, and MyCompany.force.com/partners. A yellow warning banner states: 'You cannot modify your Salesforce site domain name after the registration process.' At the bottom, there is a form with a text input containing 'totalexperttest', a 'Check Availability' button, a success message: 'Success: The Salesforce site domain name "totalexperttest" is available.', and a checkbox labeled 'I have read and accepted the Salesforce Sites Terms of Use' next to a 'Register My Salesforce Site Domain' button.

2. Click the **New** button.

The screenshot shows a table titled 'Sites (totalexperttest.force.com)'. The table has columns for 'Site Label', 'Site URL', 'Site Description', 'Active', 'Site Type', and 'Last Modified By'. The table is currently empty, with the text 'No records to display.' below it. A 'New' button is located in the top right corner of the table header area.

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.

The screenshot shows the 'Site Edit' page in the Salesforce Setup interface. The left sidebar shows the navigation menu with 'Sites' selected under 'User Interface'. The main content area is titled 'Site Edit' and contains a 'New Site' form. The form includes the following fields and values:

- Site Label: Total Expert
- Site Name: Total Expert
- Site Description: (Empty text area)
- 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: (Empty text area)
- Site Favorite Icon: (Empty text area)
- Analytics Tracking Code: (Empty text area)
- URL Rewriter Class: (Empty text area)
- Enable Feeds:
- Clickjack Protection Level: Allow framing by the same origin only (Recommended)

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

The screenshot shows the 'Site Details' page for the 'TotalExpert' site in the Salesforce Setup interface. The left sidebar shows the navigation menu with 'Users' selected under 'ADMINISTRATION'. The main content area is titled 'Site Details' and contains the following information:

- Site Name: TotalExpert
- Site Contact: Matthew Kurnyta
- Login: Not Allowed
- Active Site Home Page: AnswersHome
- Inactive Site Home Page: InMaintenance
- Site Template: SiteTemplate
- Clickjack Protection Level: Allow framing by the same origin only (Recommended)
- Require Secure Connections (HTTPS):
- Upgrade all requests to HTTPS:
- Enable Browser Cross Site Scripting Protection:
- Guest Access to the Payments API:
- Default Record Owner: Matthew Kurnyta
- Created By: Matthew Kurnyta, 4/6/2021 12:15 PM
- Last Modified By: Matthew Kurnyta, 4/6/2021 12:17 PM

The 'Public Access Settings' button is highlighted in the top navigation bar. Below the site details, there is a 'Custom URLs' table with the following columns: Action, Domain Name, Path, Current HTTPS Option, Certificate and Key, Certificate Expiration Date, and Site Primary Custom URL.

Action	Domain Name	Path	Current HTTPS Option	Certificate and Key	Certificate Expiration Date	Site Primary Custom URL
Edit Del View Preview as Admin	totalexperttest.force.com	/	No HTTPS			<input type="checkbox"/>

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



Enabled Custom Setting Definitions Access (0) | Enabled Flow Access (0) | Enabled Custom Permissions (0)

Profile Detail Edit View Users

Name	TotalExpert Profile		
User License	Guest User License	Custom Profile	✓
Description			
Created By	Matthew Kurnyta, 4/6/2021, 12:15 PM	Modified By	Matthew Kurnyta, 4/6/2021, 12:15 PM

9. Click the username.

TotalExpert Profile Help for this Page

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

Action	Full Name	Alias	Username	Last Login	Role	Active	Profile	Manager
Edit	Site Guest User, TotalExpert	guest	totalexpert@totalexperttest.force.com			✓	TotalExpert Profile	

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

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

Setup Home | Home | Object Manager

Quick Find

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

New Salesforce Mobile App QuickStart

Lightning Usage

Optimizer

Manage Subscription

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Data

SETUP Users Help for this Page

User **TotalExpert Site Guest User**

[Permission Set Assignments \(0\)](#) | [Permission Set Assignments: Activation Required \(0\)](#) | [Permission Set Group Assignments \(0\)](#) | [Permission Set License Assignments \(0\)](#) | [Public Group Membership \(0\)](#) | [Queue Membership \(0\)](#) | [User Skills \(0\)](#) | [Installed Mobile Apps \(0\)](#)

User Detail Edit Sharing

Name	TotalExpert Site Guest User	User License	Guest License
Alias	guest	Profile	TotalExpert Profile
Email	stanley@applephony.com	Active	✓
Username	totalexpert@totalexperttest.force.com	Marketing User	<input type="checkbox"/>
Nickname	TotalExpert	Mobile Push Registrations	View
Division		Salesforce CRM Content User	<input type="checkbox"/>
Time Zone	(GMT+00:00) Greenwich Mean Time (GMT)	Email Encoding	Unicode (UTF-8)
Locale	English (United States)		
Language	English		
Federation ID			
App Registration: One-Time Password Authenticator	i	Used Data Space	0 B [View]
App Registration: Salesforce Authenticator	i	Used File Space	0 B [View]
Security Key (U2F)	i	Individual	
Lightning Login	i		
Temporary Verification Code (Expires in 1 to 24 Hours)	[Generate]		
Created By	Matthew Kurnyta, 4/6/2021, 12:15 PM	Modified By	Matthew Kurnyta, 4/6/2021, 12:17 PM

[Edit](#) [Sharing](#)

Permission Set Assignments [Edit Assignments](#) [Permission Set Assignments Help](#)

No records to display.

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**.

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Tableau CRM Platform Admin	Create and customize Tableau CRM apps, dashboards, datasets a...	Analytics Platform
<input type="checkbox"/>	Tableau CRM Platform User	View Tableau CRM apps and dashboards.	Analytics Platform
<input type="checkbox"/>	Tableau CRM Plus Admin	Access to all features enabled by Tableau CRM Plus license	Tableau CRM Plus
<input type="checkbox"/>	Tableau CRM Plus User	Access to read only features enabled by Tableau CRM Plus license	Tableau CRM Plus
<input type="checkbox"/>	Total Expert Site User	Assign permission for the public site guest user.	
<input type="checkbox"/>	Total Expert Standard User	Enables the user to view Engagement activities.	

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



SETUP **Permission Sets**

Permission Set **Total Expert Standard User** Video Tutorial | Help for this Page

Find Settings... | Clone | Edit Properties | **Manage Assignments**

Permission Set Overview

Description	Enables the user to view Engagement activities.	API Name	Total_Expert_Standard_User
License		Namespace Prefix	totalexpert
Session Activation Required	<input type="checkbox"/>	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 Standard User** Help for this Page

« Back to: [Permission Set](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

Add Assignments Remove Assignments

Full Name ↑	Alias	Username	Last Login	Role	Active	Profile	Manager
No records to display.							

Add Assignments Remove Assignments

5. Assign to users.

SETUP **Permission Sets**

Assign Users **Admin Users** Help for this Page

View: Admin Users | Edit | Create New View

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

Assign Cancel

Action	Full Name ↑	Alias	Username	Last Login	Role	Active	Profile	Manager
<input checked="" type="checkbox"/> Edit	Kurnyta, Matthew	MKurn	matt+teprodpack@appiphony.com	4/6/2021, 12:53 PM		<input checked="" type="checkbox"/>	System Administrator	

Assign Cancel

Identity Provider

Identity Provider must be enabled to access SAML login information.

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

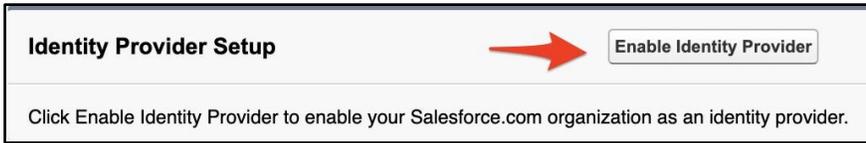
Setup Home Object

Q identity provider

Identity

Identity Provider

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



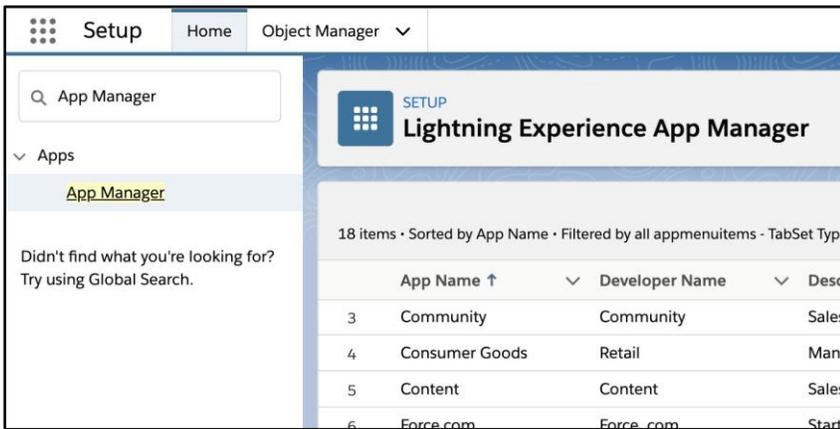
Configure Your SSO

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.

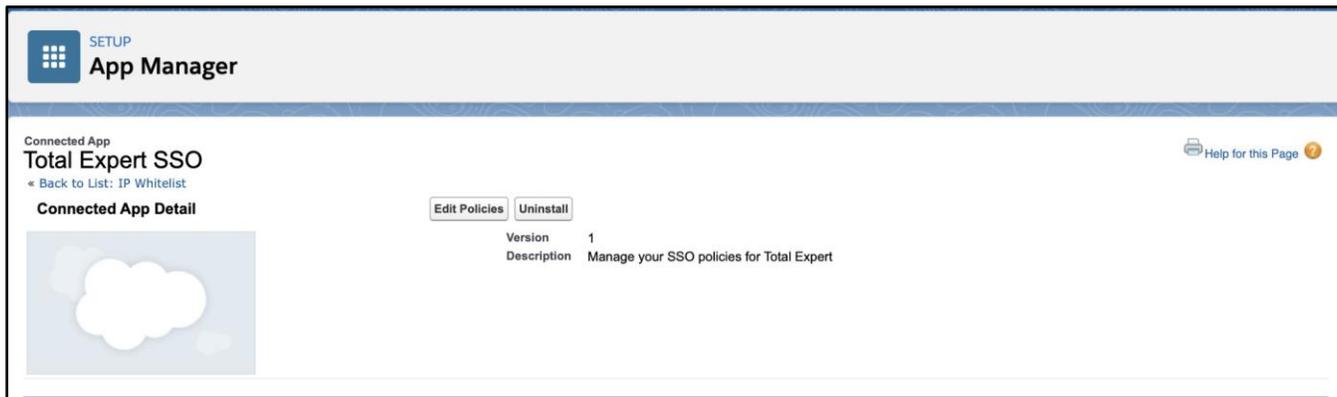
1. Navigate to **Setup**.
2. Search for **app manager**.
3. Select **App Manager**.



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.

Entity Id	<input type="text" value="https://totalexpert.net"/>	ACS URL	<input type="text" value="https://insert-acs-url-here"/>
Subject Type	<input type="text" value="Custom Attribute"/>	Name ID Format	<input type="text" value="urn:oasis:names:tc:SAML:1.1:nameid-format:emailAddress"/>
Custom Attribute	<input type="text" value="TE User Email"/>	Issuer	<input type="text"/>
Verify Request Signatures	<input type="checkbox"/>	Idp Certificate	<input type="text" value="Default IdP Certificate"/>
Enable Single Logout	<input type="checkbox"/>		

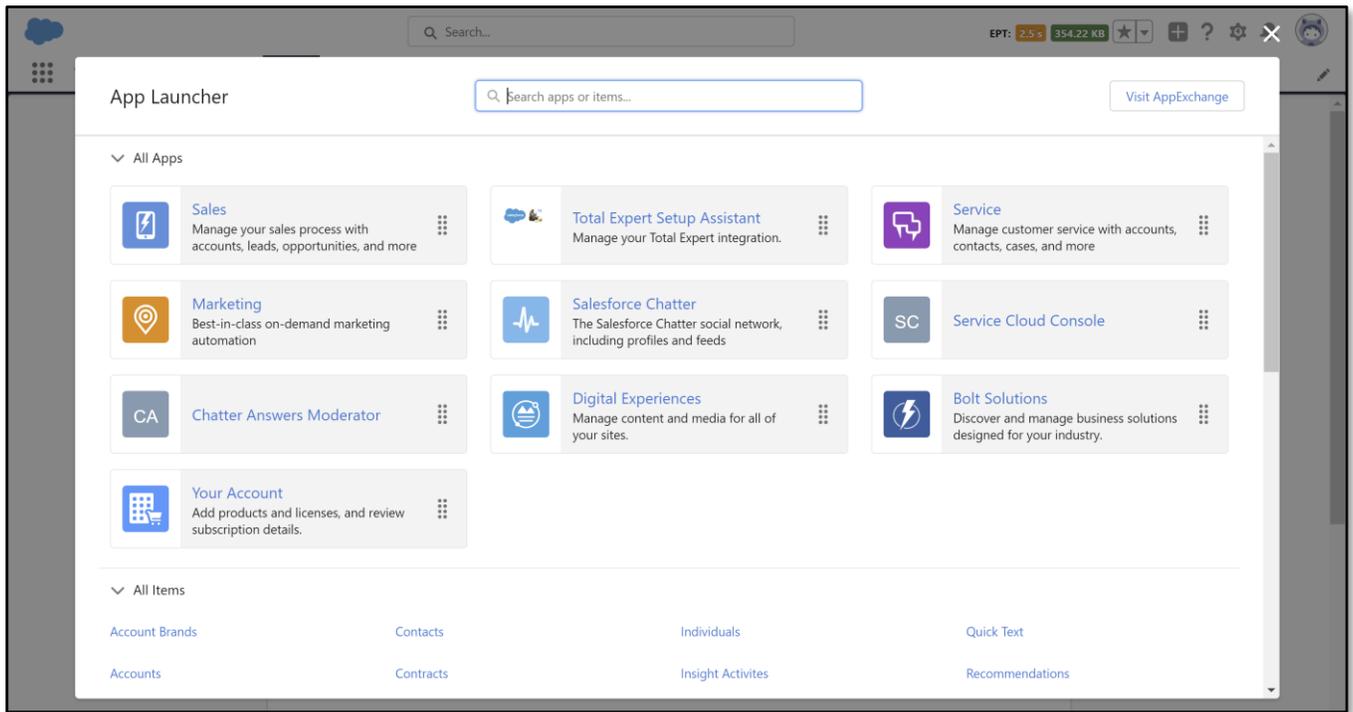
7. Click the **Save** button.

Setup Assistant

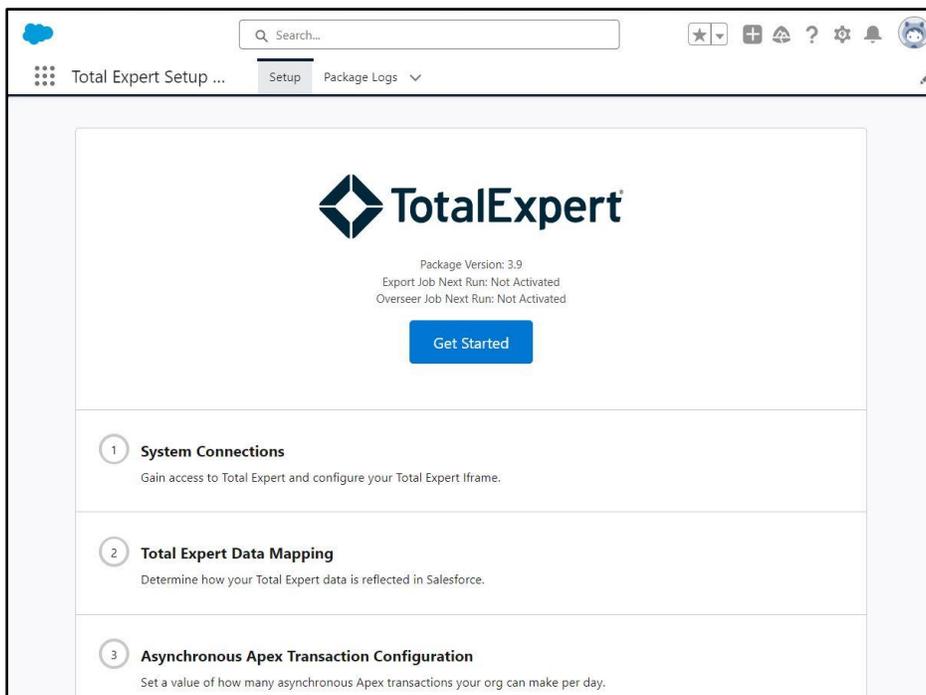
Total Expert Setup Assistant

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.



System Connections

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...

Client Secret
Enter Client Secret...

Scope
accountInteraction loanInteraction webhookInteraction leadInteraction getSchema crm

Grant Types
authorization_code refresh_token

Authorize

Next >

Would you like to enable the app for sandbox use?

- 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.

- Click the **Finish** button.

System Connections

Single Sign-On and Iframe Configuration

Below are instructions on how to setup Single Sign-On for the Total Expert iframe. If you need additional help, please contact your Total Expert representative.

Service Provider Name: Enter Service Provider Name...

Total Expert Iframe Path: https://ct.totalexpert.net /dashboard

Back

Finish ✓

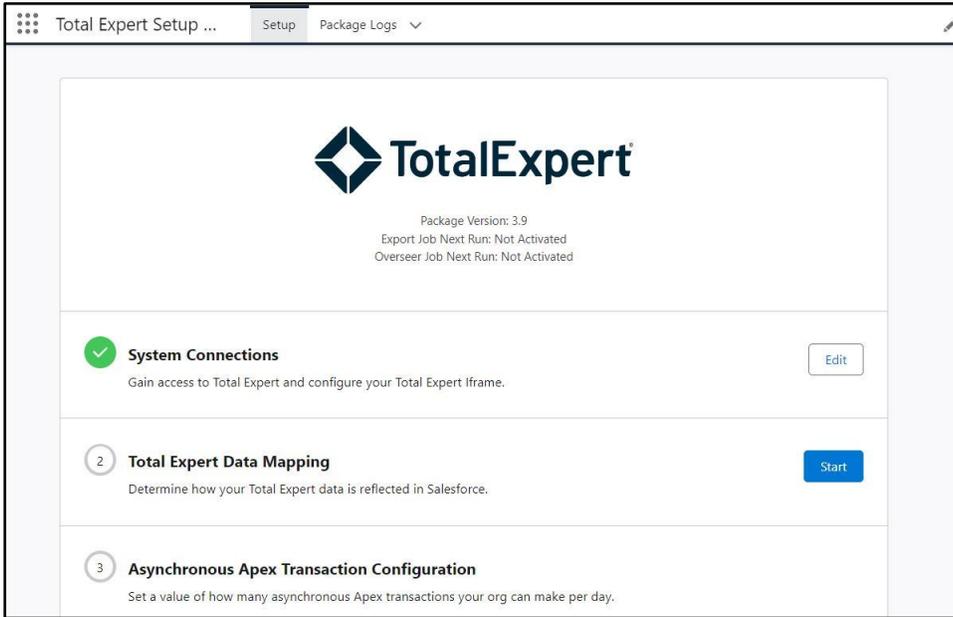
- 1. Enable Salesforce as a your Identity Provider**
To enable your org as an identity provider, navigate to [Identity Provider](#) in the Salesforce Setup and click on **Enable Identity Provider**. Use the default Self Signed Certificate provided by Salesforce and click **Save**.
If your org is already enabled as an identity provider, you can move on to the next step.
- 2. Exchange and collect SSO information with Total Expert**
Before setting up your SSO configuration in Salesforce, there is a list of items you must send to and retrieve from Total Expert.
 - Send Identity Provider Certificate to Total Expert - to obtain this certificate, go to [Identity Provider](#) in the Salesforce Setup and click **Download Certificate**. Provide Total Expert with the .cert file you downloaded.
 - Request for the Service Provider Name - the service provider name will be provided by Total Expert. This name will be needed to complete your SSO configuration in the next section.
 - Request for an ACS URL - this endpoint url will be provided by Total Expert and will be needed to complete your SSO configuration in the next section.
- 3. Configure your SSO**
Once you've retrieved the requested items from Total Expert, you are now ready to configure your SSO.
Navigate to [App Manager](#) in the Salesforce Setup and highlight the **Total Expert SSO** app. In the drop down menu to the right, select **Manage**. Click on **Edit Policies** located at the top of the page and update the ACS URL field with the ACS URL provided by Total Expert and click **Save**.



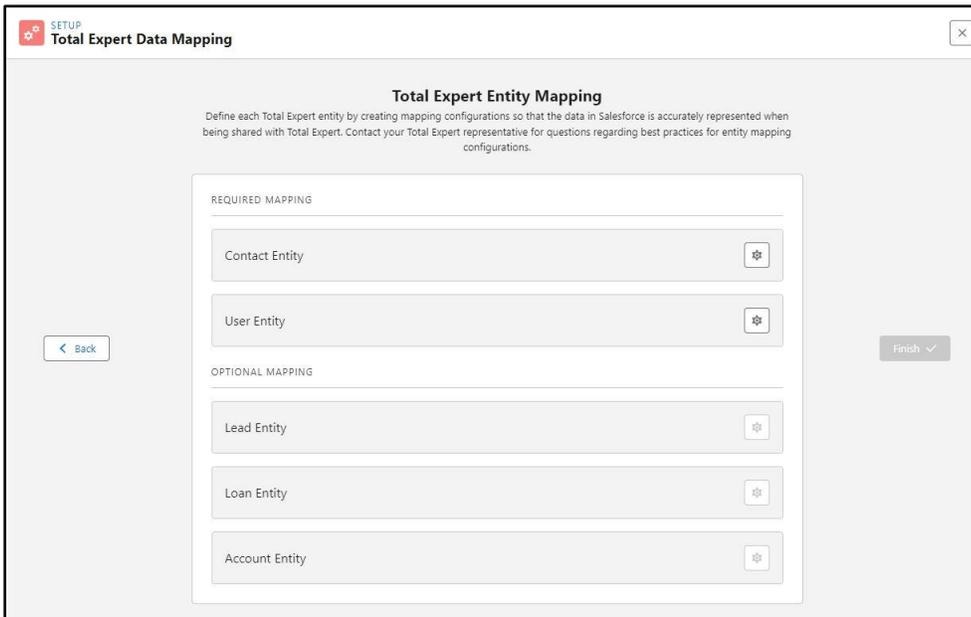
You are returned to the Total Expert Setup Assistant.

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.





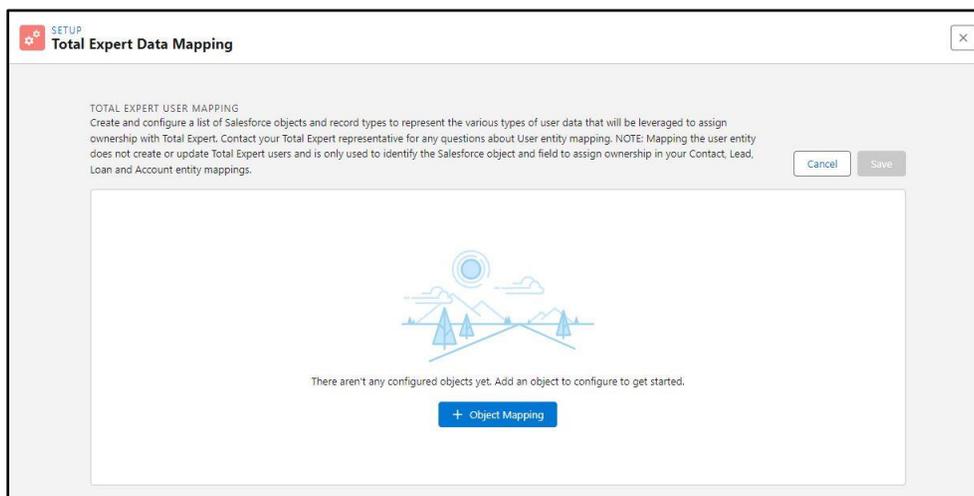
User Entity

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.

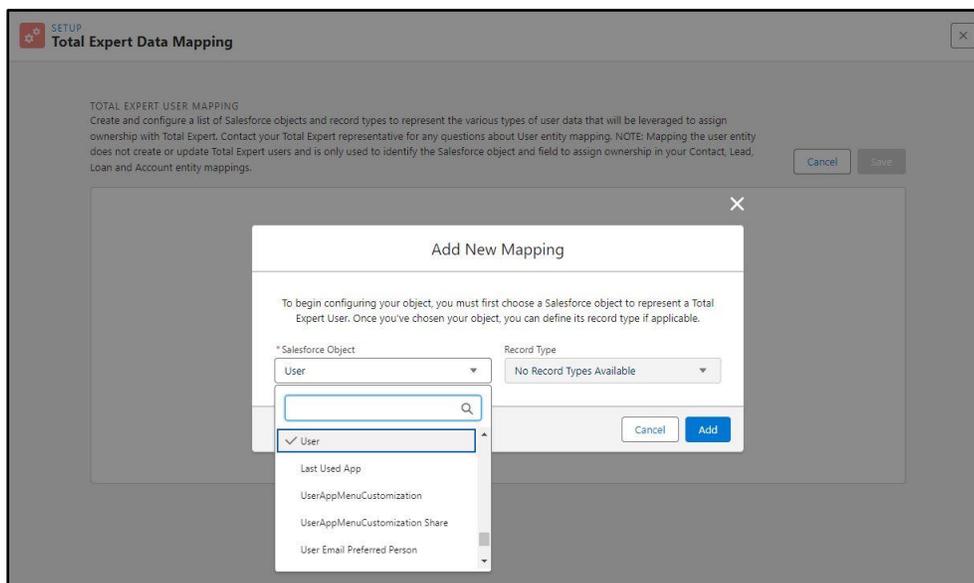
Note

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.



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

Cancel Save

Configured Objects

- User
- No Record Type
- + Object Mapping

*Salesforce Object: User
Record Type: No Record Types Available

User Object Field Mapping
Configure the fields for the Salesforce object that you have defined above as a Total Expert User entity.

TOTAL EXPERT	DATA FLOW	SALESFORCE	REMOVE
Email	←	Email	🗑️

Add Row

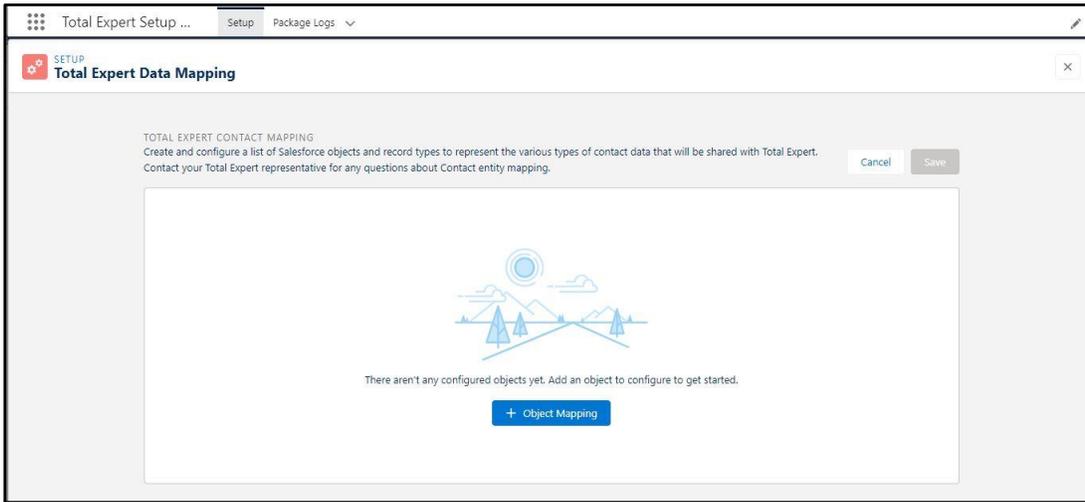
- Complete your data mapping. The left column lists the user identifier field in Total Expert. Your options are **Email, External ID, or Username**.
- In the 3rd column, select the corresponding field from Salesforce.
 - The value in that field of the Salesforce record will be used to assign ownership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

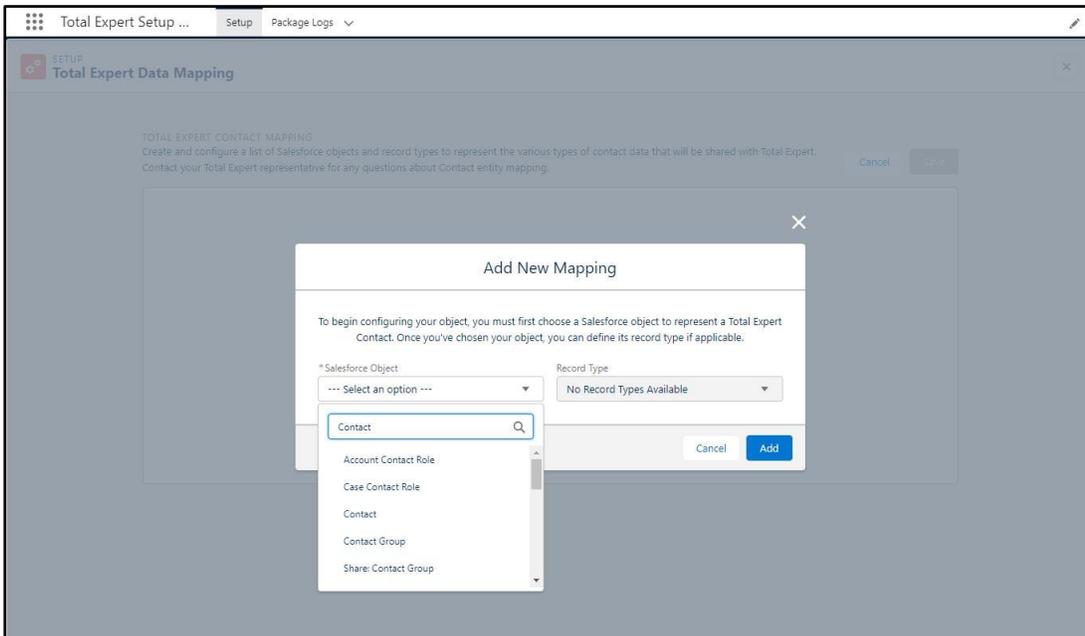
Contact Entity

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.

- Click the gear icon to begin mapping the Salesforce object and individual fields with Total Expert.
- 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.



SETUP Total Expert Data Mapping

TOTAL EXPERT CONTACT MAPPING
Create and configure a list of Salesforce objects and record types to represent the various types of contact data that will be shared with Total Expert. Contact your Total Expert representative for any questions about Contact entity mapping.

Cancel Save

Configured Objects
Contact Borrower
+ Object Mapping

*Salesforce Object: Contact Record Type: Borrower

Contact Object Field Mapping
Configure the fields for the Salesforce object that you have defined above as a Total Expert Contact entity.

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	🗑️
City	←	Mailing City	🗑️
Email	←	Email	🗑️

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
Contact Borrower
+ Object Mapping

*Salesforce Object: Contact Record Type: Borrower

Contact Object Field Mapping
Configure the fields for the Salesforce object that you have defined above as a Total Expert Contact entity.

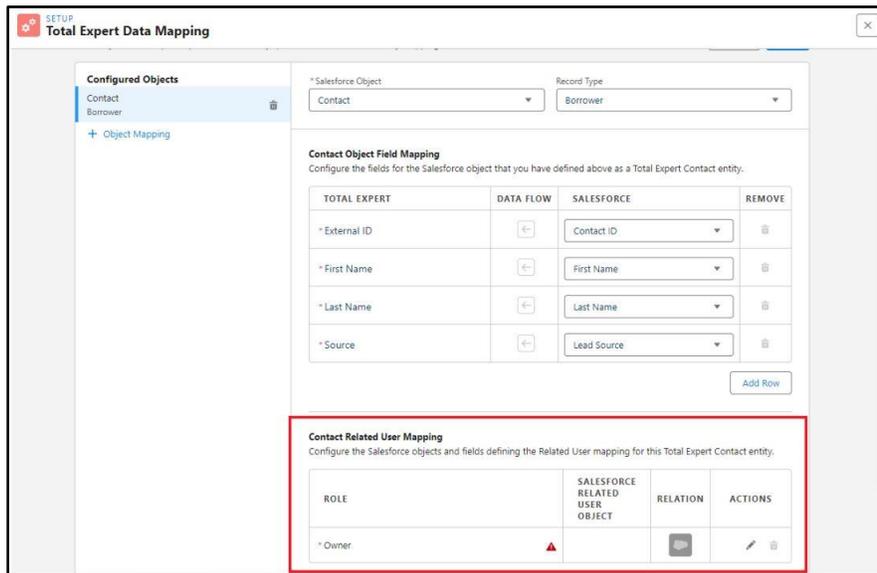
TOTAL EXPERT	DATA FLOW	SALESFORCE	REMOVE
* External ID	←	Contact ID	🗑️
* First Name	←	First Name	🗑️
* Last Name	←	Last Name	🗑️
* Source	←	Lead Source	🗑️
Email	←	Email	🗑️
Employer Name	←	Employer Company Name	🗑️

Add Row

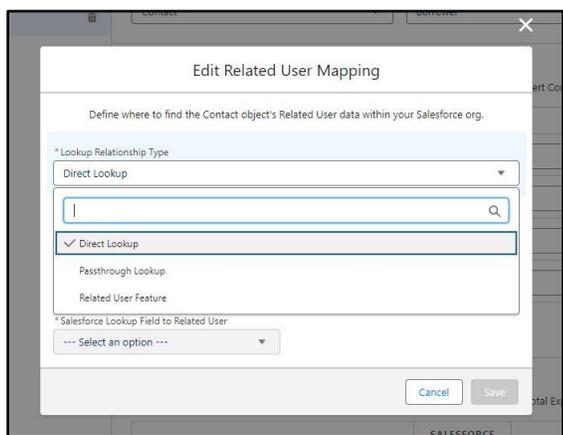
Note

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.



The screenshot shows the 'Edit Related User Mapping' dialog box for a 'Contact' object. The 'Lookup Relationship Type' is set to 'Direct Lookup'. The 'Total Expert Related User Role' is 'Owner' and the 'Total Expert Entity Mapping Selection' is 'User'. The 'Salesforce Main Object' is 'Contact' and the 'Salesforce Related User Object' is 'User'. The 'Salesforce Lookup Field to Related User' is 'Owner ID'. There are 'Cancel' and 'Save' buttons at the bottom.

- 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.

The screenshot shows the 'Edit Related User Mapping' dialog box for a 'Salesforce Object'. The 'Lookup Relationship Type' is set to 'Passthrough Lookup'. The 'Total Expert Related User Role' is 'Owner' and the 'Total Expert Entity Mapping Selection' is 'User'. The 'Salesforce Main Object' is 'Contact' and the 'Salesforce Related User Object' is 'User'. The 'Salesforce Related User Reference Object' is 'Account'. The 'Salesforce Contact Lookup Field to Reference Object' is 'Account ID'. The 'Salesforce Reference Lookup Field to Related User' is 'Owner ID'. There are 'Cancel' and 'Save' buttons at the bottom.

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

The screenshot shows the 'Edit Related User Mapping' dialog box for a 'Contact' object. The 'Lookup Relationship Type' is set to 'Related User Feature'. The 'Total Expert Related User Role' is 'Owner' and the 'Total Expert Entity Mapping Selection' is '--- Select an option ---'. The 'Salesforce Main Object' is 'Contact' and the 'Salesforce Related User Object' is '--- Select an option ---'. The 'Salesforce Lookup Field to Related User' is '--- Select an option ---'. There are 'Cancel' and 'Save' buttons at the bottom.



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](#) [Validation Rules \(0\)](#)

Custom Field Definition Detail
[Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information		Object Name	Contact
Field Label	Sync With Total Expert		
Field Name	Sync_With_Total_Expert		
API Name	Sync_With_Total_Expert__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			

Note: In the screenshot, the 'Object Name' is 'Contact' and the 'Data Type' is 'Checkbox', both highlighted with a red box.



SETUP
Total Expert Data Mapping

TOTAL EXPERT CONTACT MAPPING
Create and configure a list of Salesforce objects and record types to represent the various types of contact data that will be shared with Total Expert. Contact your Total Expert representative for any questions about Contact entity mapping.

Cancel Save

Configured Objects

- Contact
- Borrower
- + Object Mapping

* Salesforce Object: Contact
Record Type: Borrower

Contact Object Field Mapping
Configure the fields for the Salesforce object that you have defined above as a Total Expert 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	🗑️
Sync With Total Expert	↔	Sync With Total Expert	🗑️

Add Row

- 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 reflect 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 unsubsribes 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 unsubsribes are not made, and to avoid overwriting the most recent email subscription details.



Configured Objects

Contact
No Record Type

+ Object Mapping

*Salesforce Object: Contact
Record Type: No Record Types Available

Contact Object Field Mapping
Configure the fields for the Salesforce object that you have defined above as a Total Expert 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	🗑️
Email Opted Out Date	↔	Email Opt Out Date	🗑️
Email Opted Out	←	<input type="text"/>	🗑️

Email Opt Out Date (Email_Op...
 Fax Opt Out (HasOptedOutOff...
 First Name (FirstName)

Add Row

- 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

Contact
No Record Type

+ Object Mapping

*Salesforce Object: Contact
Record Type: No Record Types Available

Contact Object Field Mapping
Configure the fields for the Salesforce object that you have defined above as a Total Expert 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	🗑️
Email Opted Out Date	↔	Email Opt Out Date	🗑️
Email Opted Out	←	Email Opt Out	🗑️

Email Opt Out (HasOptedOut...
 Email Opt Out Date (Email_Op...

Add Row

Contact Group Mapping

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

Contact
No Record Type

+ Object Mapping

* Salesforce Object: Contact
Record Type: No Record Types Available

Contact Object Field Mapping
Configure the fields for the Salesforce object that you have defined above as a Total Expert 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	🗑️
Email Opted Out Date	↔	Email Opt Out Date	🗑️
Email Opted Out	↔	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.

Engagement Webhook Subscription

Create a Salesforce Public Site in order to subscribe to Total Expert engagements. Once you have successfully created your public site, paste its URL in the "Salesforce Public Site URL" input below. Select the engagement activity subscriptions to enable. The corresponding engagement activities will be fed back into Salesforce. Click "Update Subscription" to apply changes to the subscribed engagement activities.

Need help creating a public site? Update Subscription

Connected

Salesforce Public Site URL
https://expertbank.my.salesforce-sites.com/1

All Webhook Events **All Subscribed Events (3)**

Search Events...

Email Resubscribed Created

Email Unsubscribe Updated

Email Unsubscribed Created

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.



SETUP
Total Expert Data Mapping

* Last Name	←	Last Name	▼	🗑️
* Source	←	Lead Source	▼	🗑️
Email	←	Email	▼	🗑️
Sync With Total Expert	←	Sync With Total Expert	▼	🗑️

Add Row

Contact Related User Mapping
Configure the Salesforce objects and fields defining the Related User mapping for this Total Expert Contact entity.

ROLE	SALESFORCE RELATED USER OBJECT	RELATION	ACTIONS
* Owner	User	👤	🗑️ ✎️

Contact Group Mapping
Configure the Salesforce objects and fields defining the group mapping for this Total Expert Contact entity.

SALESFORCE GROUP OBJECT	RELATION	ACTIONS
No mappings have been added		

Add Row

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.

Edit Group Mapping

Define where to find the Contact object's Group data within your Salesforce org.

*Junction Object Contact Group Relationship	*Group Object Contact Group
*Junction Lookup Field to Group Contact Group (Contact_Group__c)	*Group Name Field TE Name (TE_Name__c)
*Junction Lookup Field to Contact Contact (Contact__c)	

Cancel Save

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

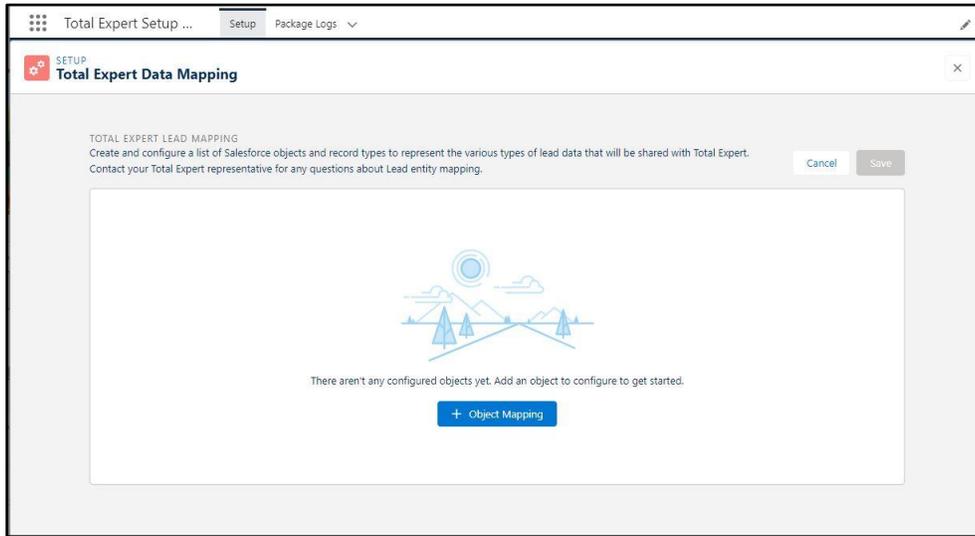
The Total Expert Lead entity represents a contact's interaction with your organization from a specified source, and indicates an opportunity.

Example

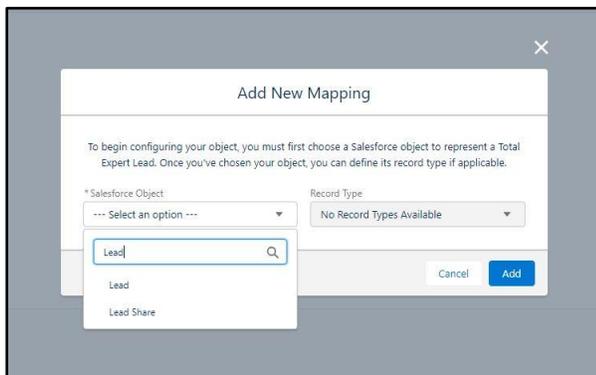
If a consumer were shopping for a mortgage on LendingTree and was matched with your organization, LendingTree would send a lead to Total Expert, which creates a contact record and an associated lead record. If that consumer then navigates to your website and completes a contact form, another lead would 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.



SETUP **Total Expert Data Mapping**

TOTAL EXPERT LEAD MAPPING
Create and configure a list of Salesforce objects and record types to represent the various types of lead data that will be shared with Total Expert. Contact your Total Expert representative for any questions about Lead entity mapping.

Cancel Save

Configured Objects

- Lead
- No Record Type
- + Object Mapping

* Salesforce Object: Lead Record Type: No Record Types Available

Lead Object Field Mapping
Configure the fields for the Salesforce object that you have defined above as a Total Expert Lead entity.

TOTAL EXPERT	DATA FLOW	SALESFORCE	REMOVE
* Email	←	Email	🗑️
* External ID	←	Lead ID	🗑️
* First Name	←	First Name	🗑️
* Last Name	←	Last Name	🗑️
* Source	←	Lead Source	🗑️

Add Row

Lead Related User Mapping
Configure the Salesforce objects and fields defining the Related User mapping for this Total Expert Lead entity.

TOTAL EXPERT	SALESFORCE RELATED

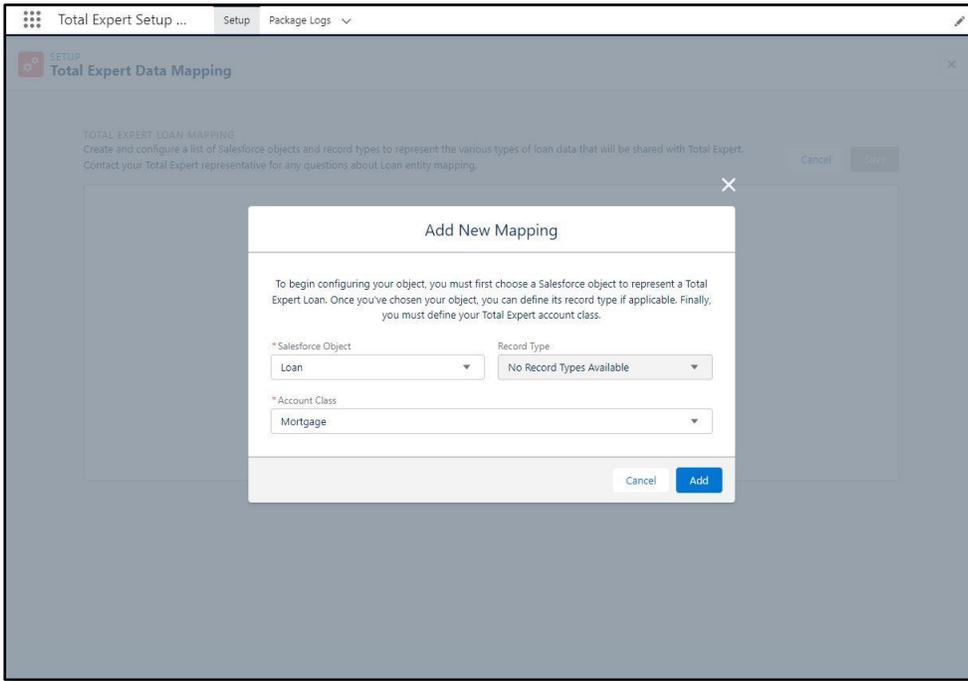
Just like for the Contact entity, the Lead Related User Mapping is required for the Lead entity.

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.

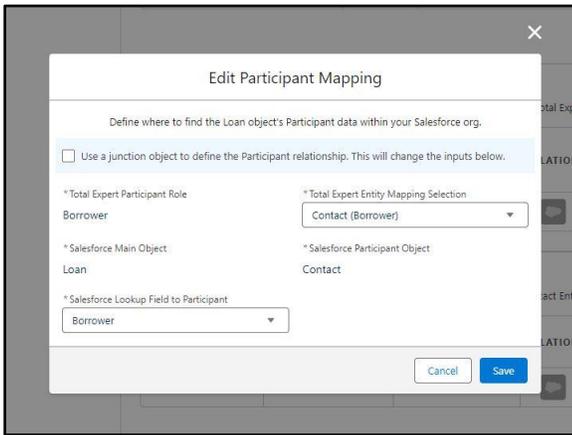
Loan Entity

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.



Loan Related User Mapping
Configure the Salesforce objects and fields defining the Related User mapping for this Total Expert Account.

Edit Participant Mapping

Define where to find the Loan object's Participant data within your Salesforce org.

Use a junction object to define the Participant relationship. This will change the inputs below.

*Total Expert Participant Role: Borrower

*Total Expert Entity Mapping Selection: Contact (Borrower)

*Salesforce Junction Object: Loan Participant

*Salesforce Participant Object: Contact

*Salesforce Junction Lookup Field to Participant: Contact

Filter junction records by picklist value

*Junction Picklist Field: Participant Type

*Junction Picklist Value: Primary Borrower

*Salesforce Junction Lookup Field to Loan: Loan

Cancel Save

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.



SETUP
Total Expert Data Mapping

TOTAL EXPERT ACCOUNT MAPPING
Create and configure a list of Salesforce objects and record types to represent the various types of account data that will be shared with Total Expert.
Contact your Total Expert representative for any questions about Account entity mapping.

Cancel Save

Configured Objects

- Insurance Policy
- No Record Type
- + Object Mapping

* Salesforce Object: Insurance Policy Record Type: No Record Types Available * Account Class: Policy

Account Object Field Mapping
Configure the fields for the Salesforce object that you have defined above as a Total Expert Account entity.

TOTAL EXPERT	DATA FLOW	SALESFORCE	REMOVE
* Account Number	←	--- Select an option ---	🗑️
* External ID	←	Insurance Policy ID	🗑️

Add Row

Account Related User Mapping
Configure the Salesforce objects and fields defining the Related User mapping for this Total Expert Account entity.

ROLE	SALESFORCE RELATED USER OBJECT	RELATION	ACTIONS
* Owner			🗑️ ✎️ 🗑️

Account Participant Role Mapping
Determine the Salesforce fields that look up to the object you have specified in the Contact Entity mapping section.

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.

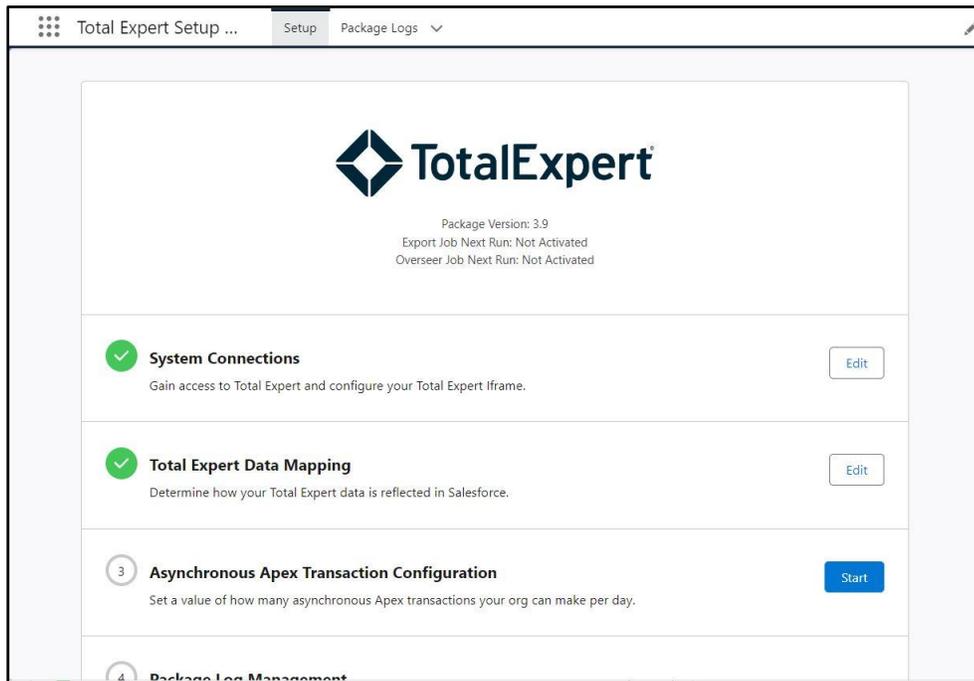
When syncing the participant to Total Expert, an attempt to create a contact record is made and follows Total Expert's deduplication logic, but the full contact payload will be passed including custom fields and contact groups.

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.

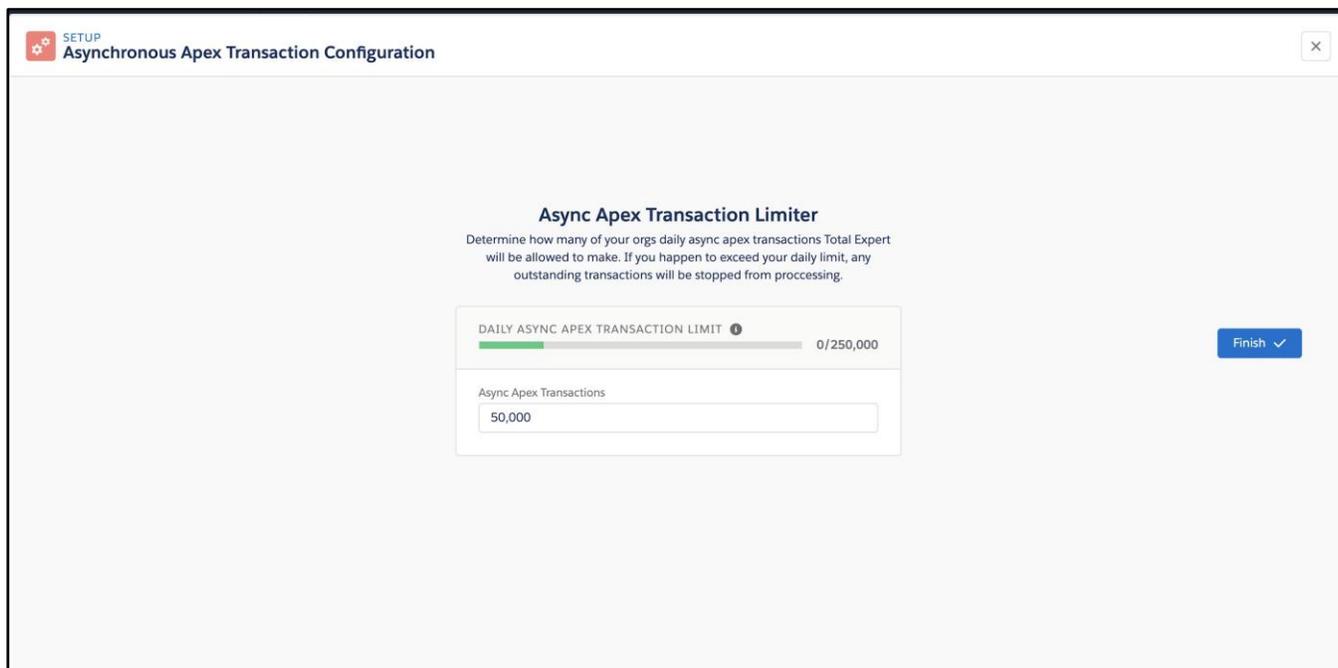
Once you have mapped the objects you wish to complete, click the **Finish** button. You are returned to the Total Expert Setup Assistant.

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.

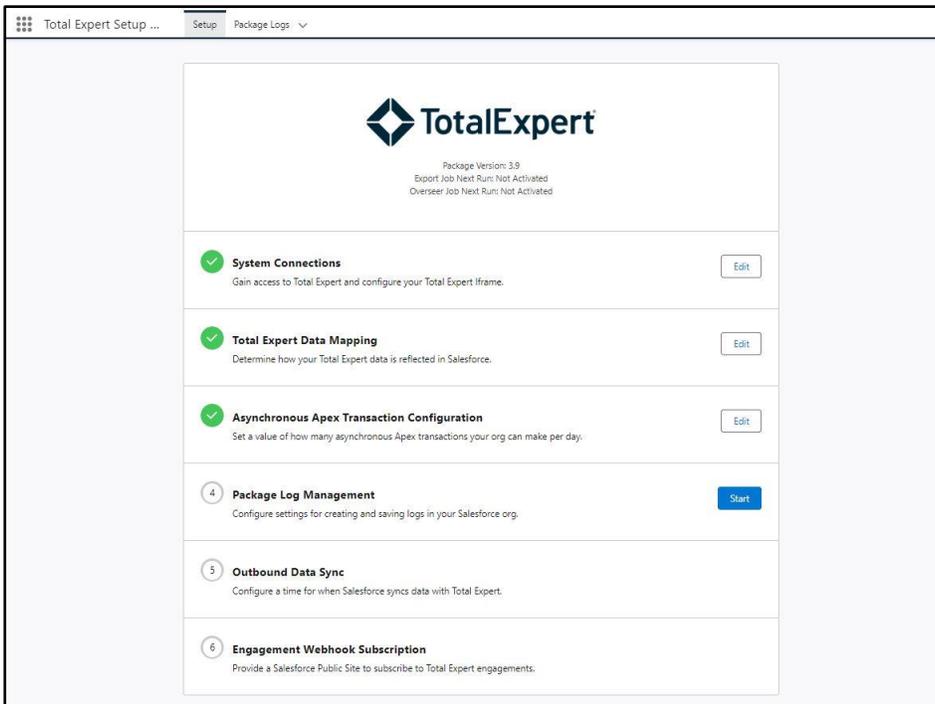
You are returned to the Total Expert Setup Assistant.

Package Log Management

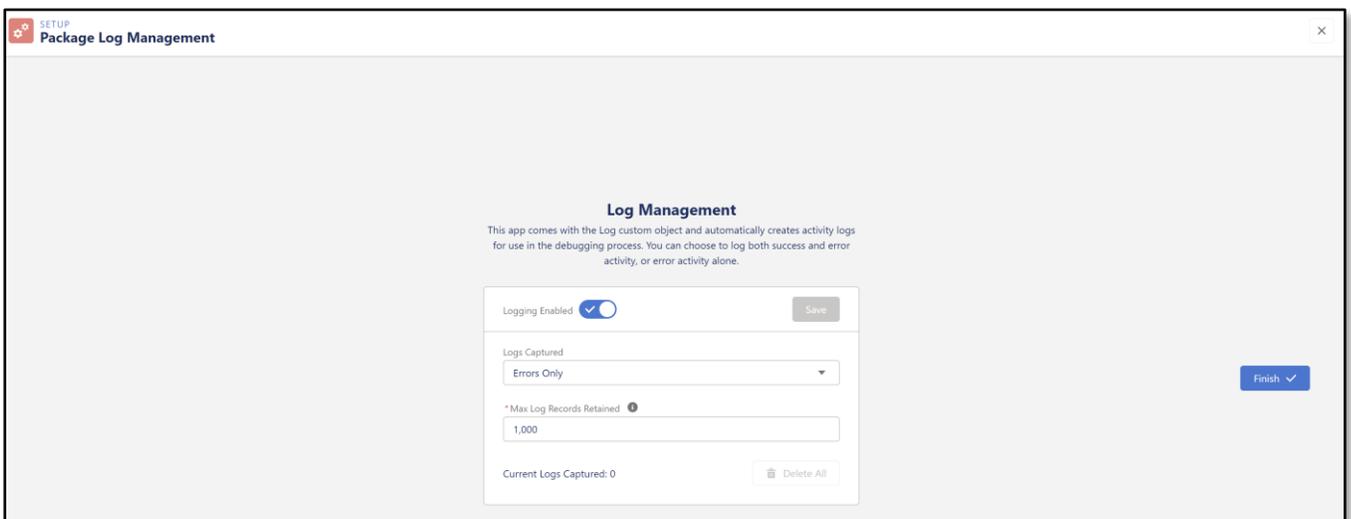
Configuring the package and error logging includes limiting the number of error logs.



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.

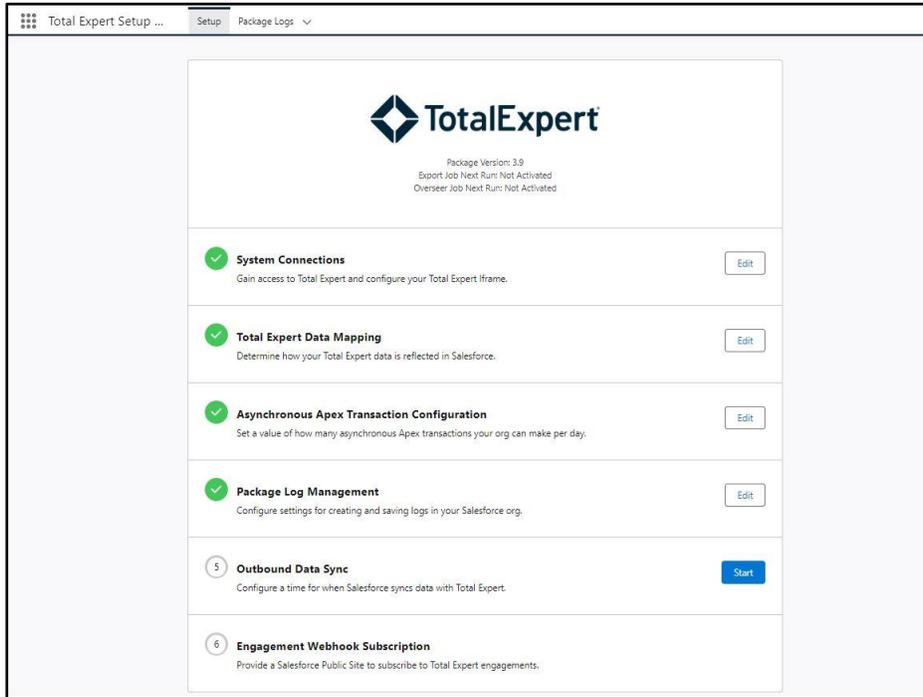




Outbound Sync

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.



SETUP
Outbound Data Sync

Outbound Data Sync
Schedule your overseer jobs for sending entity data from Salesforce to Total Expert.

Determine a time for when data 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 scheduled Apex jobs in your Salesforce org. Avoid scheduling your overseer jobs at the same time as the Apex jobs listed.

Other Scheduled Jobs

JOB NAME	NEXT RUN TIME
No scheduled jobs	

Finish ✓

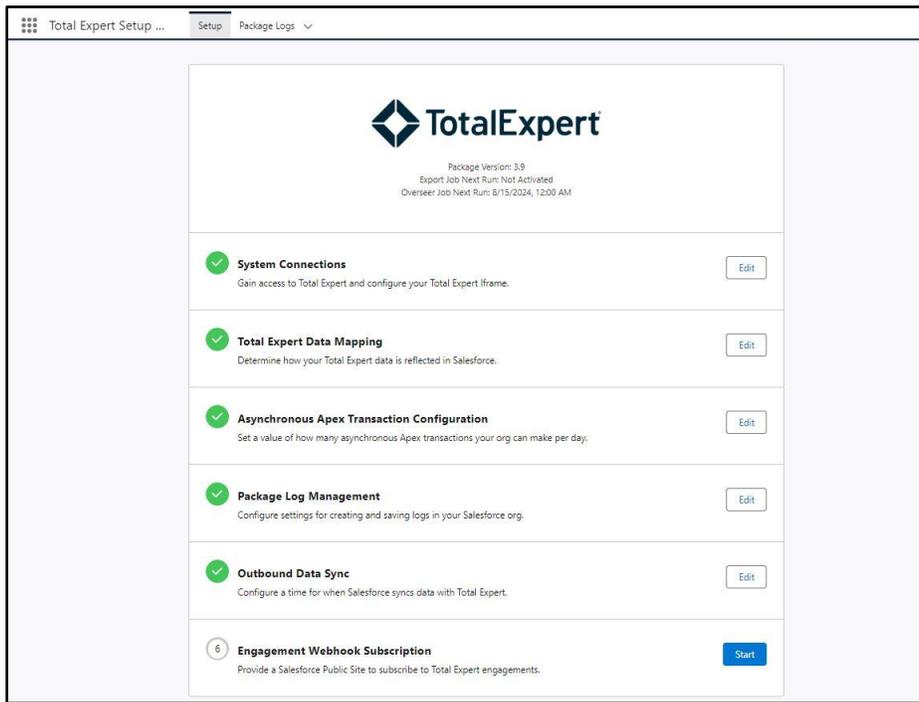
4. Click the **Finish** button.

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.



Engagement Webhook Subscription

Create a Salesforce Public Site in order to subscribe to Total Expert engagements. Once you have successfully created your public site, paste its URL in the "Salesforce Public Site URL" input below. By default, all engagement activity subscriptions will be enabled. You can adjust which engagement activities will be fed back into Salesforce. Click "Update Subscription" to apply changes to the subscribed engagement activities.

[Need help creating a public site?](#)

Subscribe

Not Connected

Salesforce Public Site URL

https://www.sample.com

Finish ✓

All Webhook Events

All Subscribed Events (0)

Q SMS

Journey Sms Failure Created



Sms Delivered Created



Sms Delivery Failure Created



Sms Opt In Sent Created



Sms Opted In 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.



Engagement Webhook Subscription

Create a Salesforce Public Site in order to subscribe to Total Expert engagements. Once you have successfully created your public site, paste its URL in the "Salesforce Public Site URL" input below. By default, all engagement activity subscriptions will be enabled. You can adjust which engagement activities will be fed back into Salesforce. Click "Update Subscription" to apply changes to the subscribed engagement activities.

[Need help creating a public site?](#)

Update Subscription

Connected

Salesforce Public Site URL

https://expertbank--teqa2.sandbox.my.salesforce-sites.com/1

All Webhook Events All Subscribed Events (10)

Search Events...

- Email Bounced Created
- Email Delivered Created
- Email Delivery Failure Created
- Email Link Clicked Created
- Email Opened Created
- Insight Created
- Sms Delivered Created

Finish ✓

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.

Engagement Activity Name	Created Date	Contact Id	Contact Lookup Id
EA-00171	8/3/2022, 12:48 PM	159109032	0035e00000sTWqGAAW
EA-00170	8/3/2022, 12:48 PM	159109032	0035e00000sTWqGAAW
EA-00169	8/3/2022, 12:48 PM	159109032	0035e00000sTWqGAAW
EA-00168	8/3/2022, 12:48 PM	159109032	0035e00000sTWqGAAW
EA-00167	8/3/2022, 11:47 AM	159109032	0035e00000sTWqGAAW
EA-00166	8/3/2022, 11:47 AM	159109032	0035e00000sTWqGAAW



Total Expert Setup ... Setup Package Logs ▾ * All | Insight Activites ▾ X

Insight Activites
All ▾

8 items • Sorted by Insight Activity Name • Filtered by All insight activites • Updated a few seconds ago

Search this list...

	<input type="checkbox"/>	Insight Activity Na... ↑ ▾	Insight Type ▾	Insight Id ▾	Created Date ▾	
1	<input type="checkbox"/>	IA-00001	Customer Intelligence: Credit Inquiry Alert	85	3/16/2023, 12:09 PM	▾
2	<input type="checkbox"/>	IA-00002	Customer Intelligence: Credit Inquiry Alert	119	3/16/2023, 12:11 PM	▾
3	<input type="checkbox"/>	IA-00003	Customer Intelligence: Credit Inquiry Alert	119	3/16/2023, 12:25 PM	▾
4	<input type="checkbox"/>	IA-00004	Customer Intelligence: Credit Inquiry Alert	119	3/16/2023, 12:29 PM	▾
5	<input type="checkbox"/>	IA-00005	Customer Intelligence: Credit Inquiry Alert	119	3/16/2023, 12:34 PM	▾
6	<input type="checkbox"/>	IA-00006	Customer Intelligence: Credit Inquiry Alert	119	3/17/2023, 6:46 AM	▾
7	<input type="checkbox"/>	IA-00007	Customer Intelligence: Credit Inquiry Alert	119	3/17/2023, 11:31 AM	▾
8	<input type="checkbox"/>	IA-00008	Customer Intelligence: Credit Inquiry Alert	119	3/17/2023, 12:05 PM	▾

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

Total Expert Setup ... Setup Package Logs ▾



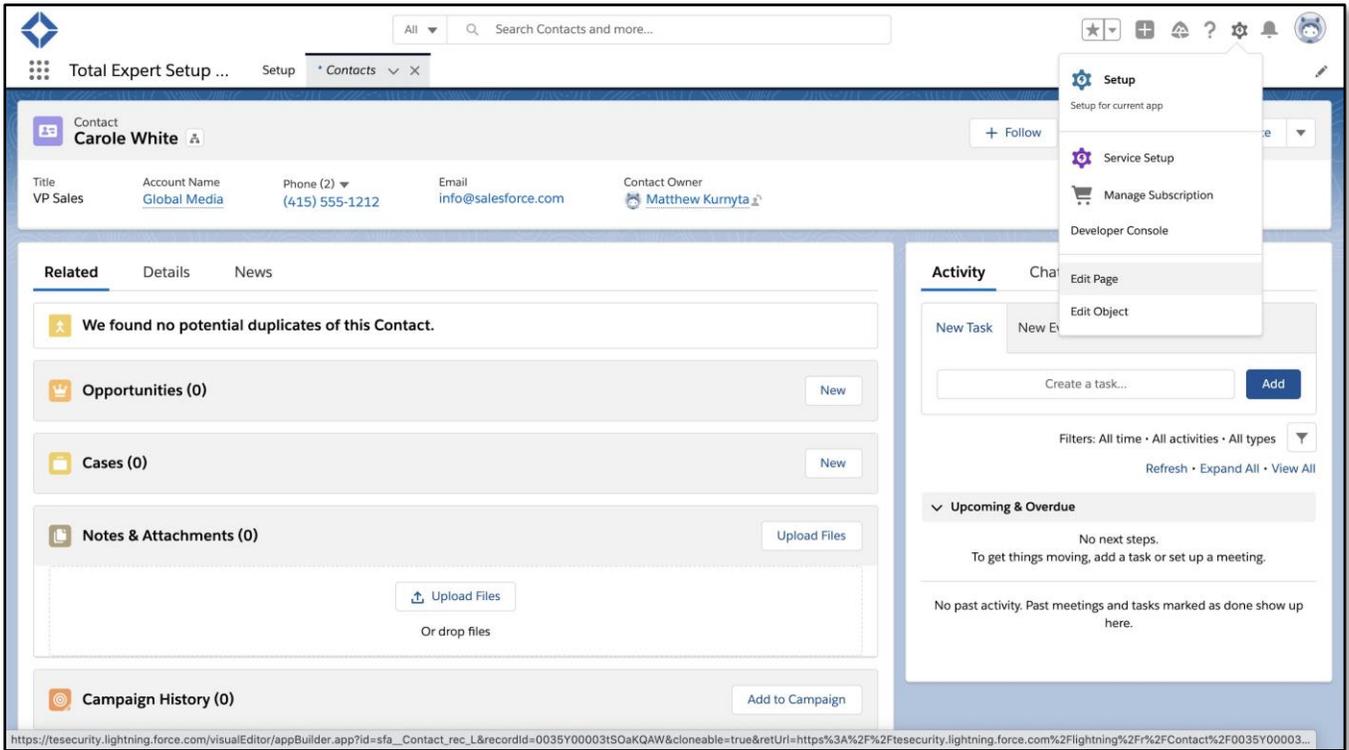
Package Version: 3.9
Export Job Next Run: Not Activated
Overseer Job Next Run: 8/15/2024, 12:00 AM

- ✔ **System Connections**
 Gain access to Total Expert and configure your Total Expert Iframe. Edit
- ✔ **Total Expert Data Mapping**
 Determine how your Total Expert data is reflected in Salesforce. Edit
- ✔ **Asynchronous Apex Transaction Configuration**
 Set a value of how many asynchronous Apex transactions your org can make per day. Edit
- ✔ **Package Log Management**
 Configure settings for creating and saving logs in your Salesforce org. Edit
- ✔ **Outbound Data Sync**
 Configure a time for when Salesforce syncs data with Total Expert. Edit
- ✔ **Engagement Webhook Subscription**
 Provide a Salesforce Public Site to subscribe to Total Expert engagements. Edit

Lightning Components

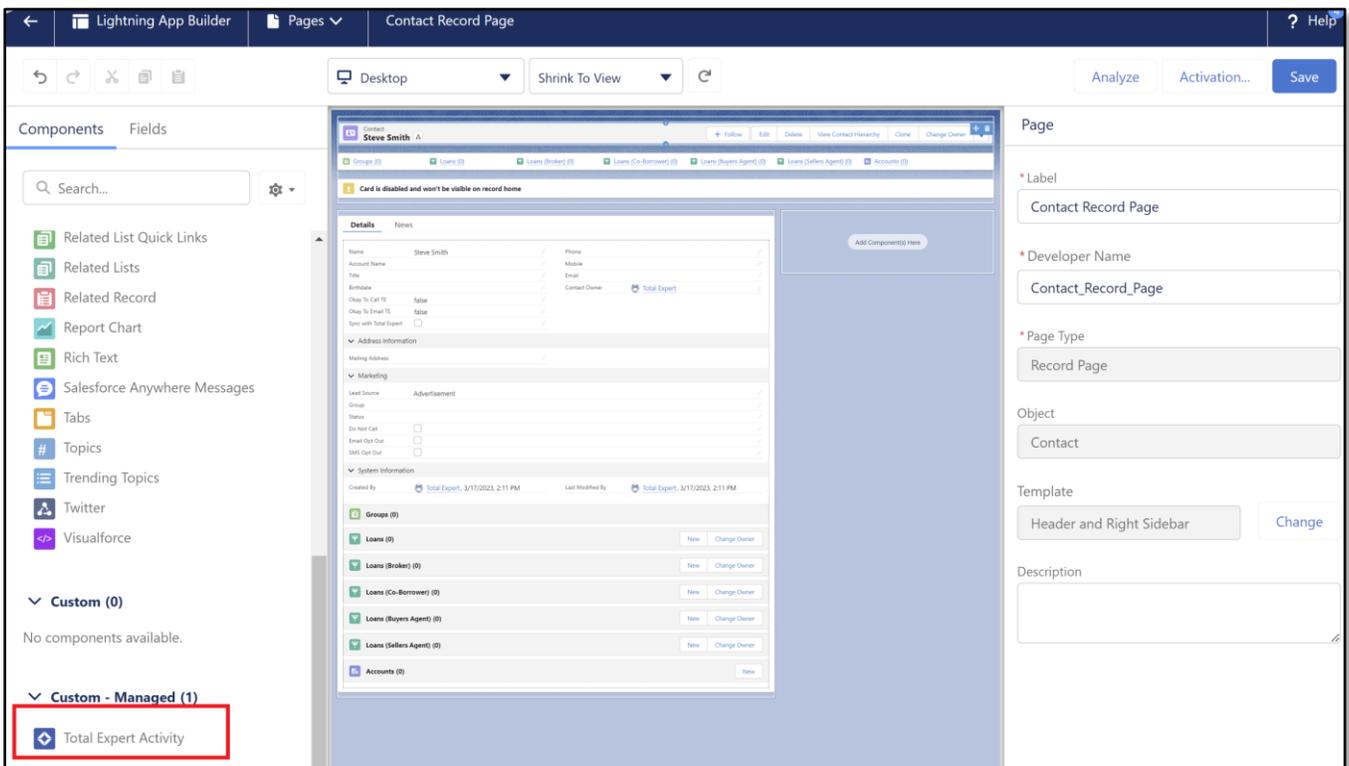
There is a Total Expert Activity timeline Lightning component that you can add to record pages.

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.

TOTAL EXPERT





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.

Activation: Bot Configuration Record Page

Custom record pages can be assigned at different levels:

- The org default** record page displays for an object unless more specific assignments are made.
- App default** page assignment, if specified, overrides the org default.
- App, record type, profile** assignments override org and app defaults.

[Learn more about Lightning page assignment.](#)

ORG DEFAULT **APP DEFAULT** APP, RECORD TYPE, AND PROFILE

Set this page as the default for Bot Configuration records for specific Lightning apps. An app default page displays for all the object's records in an app unless specific app, record type, and profile assignments are made.

[Assign as App Default](#)



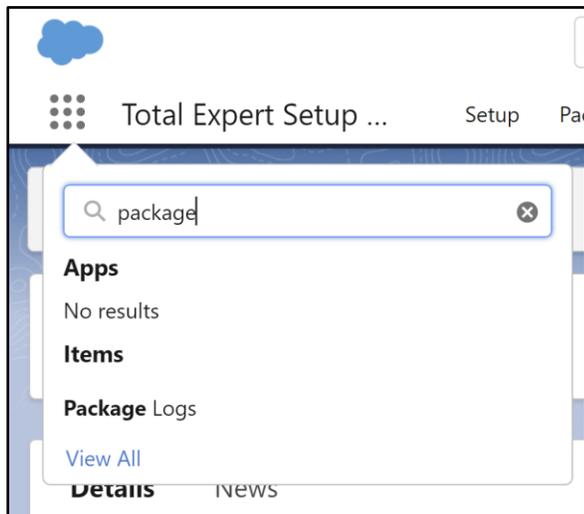
5. Click the **Save** button.
6. Click **Back** to see the edited record page.

Troubleshooting

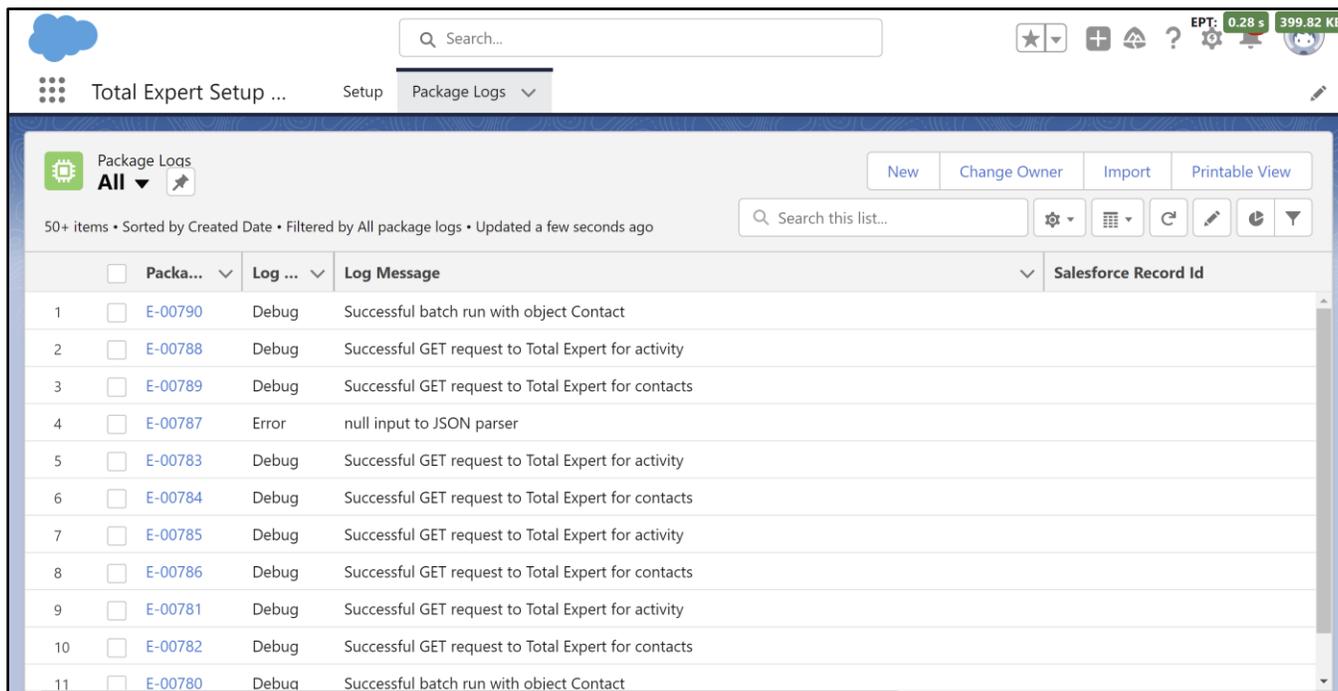
Error Log

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.

Package Log
E-00787

Related

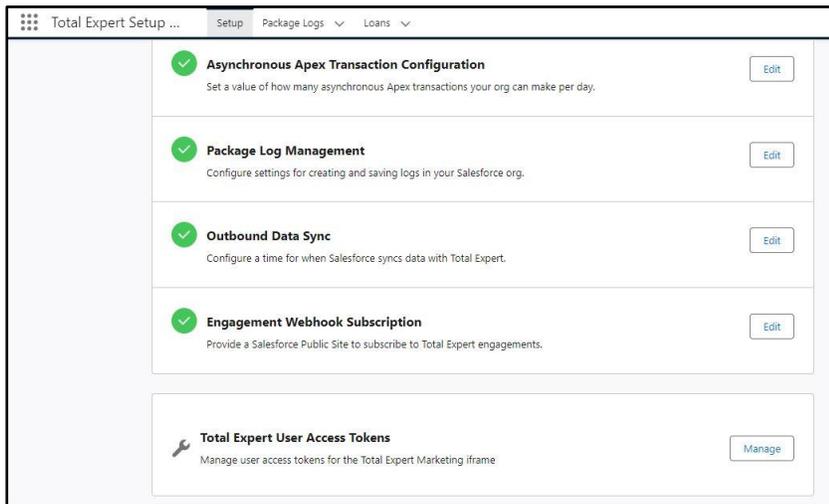
Details

Package Log Name	Owner
E-00787	Matt Kurnyta
Log Message	Salesforce Record Id
null input to JSON parser	
Log Location	
restEngagementActivities.cls catch failed on line 11	
Stack	
"(System Code)"	
Total Expert Object	
Log Type	
Error	
Callout Details	
Response Code	
Payload	Response Body
Created By	Last Modified By
New Test Site Site Guest User , 3/17/2023, 1:47 PM	New Test Site Site Guest User , 3/17/2023, 1:47 PM

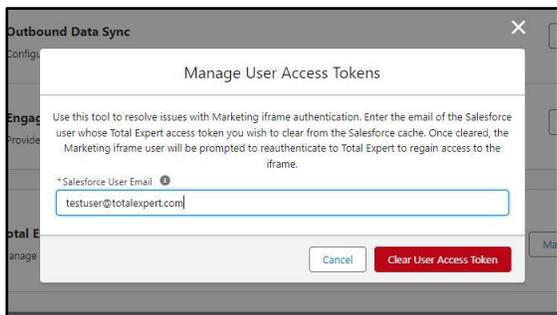
User Access Token Refresh

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.