Integration Guidelines:
Sales Boomerang & Usherpa

Integrating Sales Boomerang with your Usherpa Customer Relationship Management (CRM) delivers timely borrower intelligence directly to your Usherpa Dashboard, under the Sales Boomerang tab inside the Contact Record. Users can access that intelligence without the friction of learning or logging into a new system, leveraging it for direct outreach and/or automations for borrowers and prospects.

Enabling the Integration

We recommend that you give Usherpa advance notice that you will be working with Sales Boomerang on this integration. The client can reach out to their Usherpa CSM or info@usherpa.com if you do not have a Usherpa CSM assigned yet.

While the level of effort to set up integration will vary with your Usherpa instance. At a high level, these tasks will include:

- Determine the types of records to put into Sales Boomerang and confirm the data sent
- Review the test alerts sent into Usherpa
- Work with Usherpa to verify workflow for each Sales Boomerang alert type
- Verify that your data set in Sales Boomerang has the correct Usherpa CRM ID on the records

How It Works

Data exchange between Sales Boomerang and Usherpa works as follows:

- **Sending Records** – Usherpa will send new/updated records to Sales Boomerang over the API once the client is live with Sales Boomerang. To facilitate setup of the integration, Usherpa will ask you the following questions to determine when new/updated records need to be sent to Sales Boomerang:
    - What Alerts will you be signed up for? Examples of data needed include:
        - For the Credit Improvement Alert, what is the maximum credit score you would like? (For example, you may only want to have a contact on Credit watch up to a FICO score of 620.)
        - For the Rate Watch, how long after closing do you want Alerts to be delayed? i.e. We want to wait __ months after closing to send records to Sales Boomerang for Rate Watch monitoring. (Our default is 6 months post-funded.)

    - Which Contact Types do you want to use? (Our defaults are Customers and Prospects)
    - How many contacts do you need in Sales Boomerang, based on your application or close date criteria (i.e. only contacts with an application or close date after 1/1/2016).

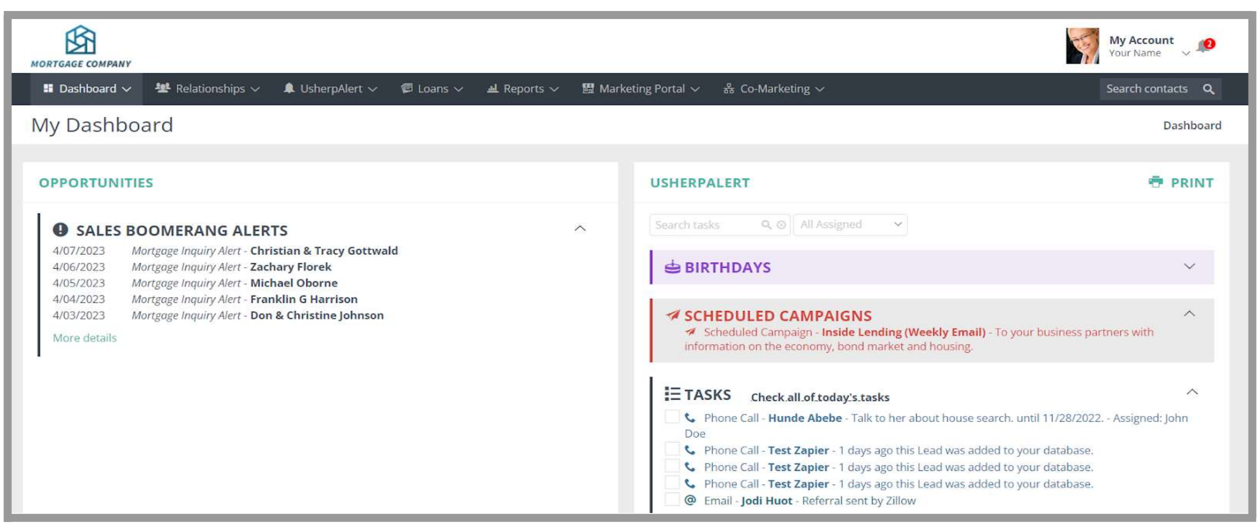
- **Receiving Alerts** - You'll work with your Customer Success Manager to configure watch settings for each of your Sales Boomerang alert types (e.g. You might require a certain FICO score for a Credit Improvement alert to trigger). Alerts that meet those criteria are received by Sales Boomerang and passed to Usherpa via the integration API within 2 hours of Sales Boomerang receiving the alert.

  Please Note: All records in Sales Boomerang require a Usherpa CRM ID to post successfully into Usherpa and update the corresponding record. If the record in Sales Boomerang DOES NOT have the correct Usherpa CRM ID, the alert will not update the record and will be ignored by Usherpa.

Making the Most Out of Borrower Intelligence

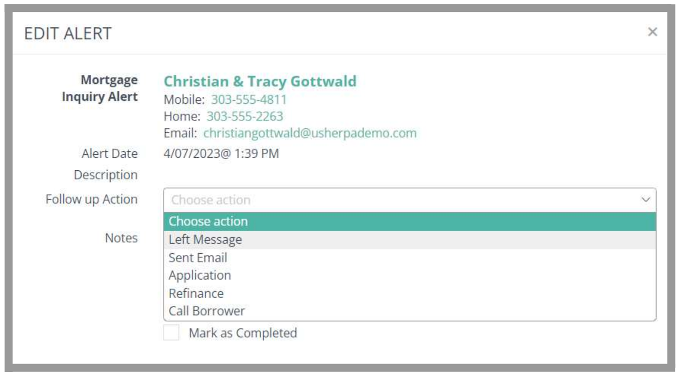
To best utilize Sales Boomerang alerts within your Usherpa account, review the steps below.

In Usherpa, Sales Boomerang alerts show on the Dashboard under the Opportunities section, displaying the last 5 alerts (a sample is shown next):

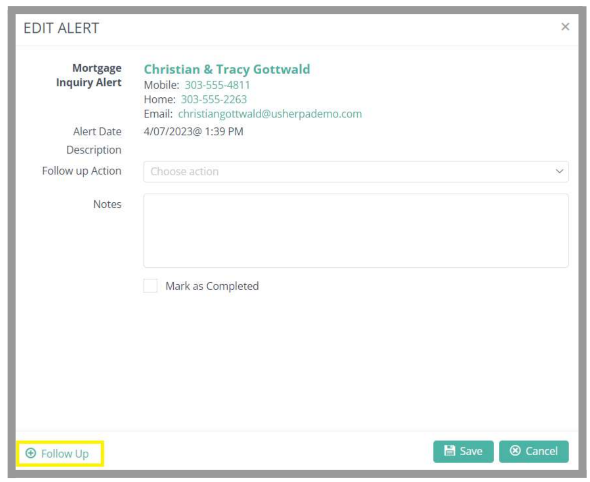


To follow up on each alert in a timely manner, refer to the following:

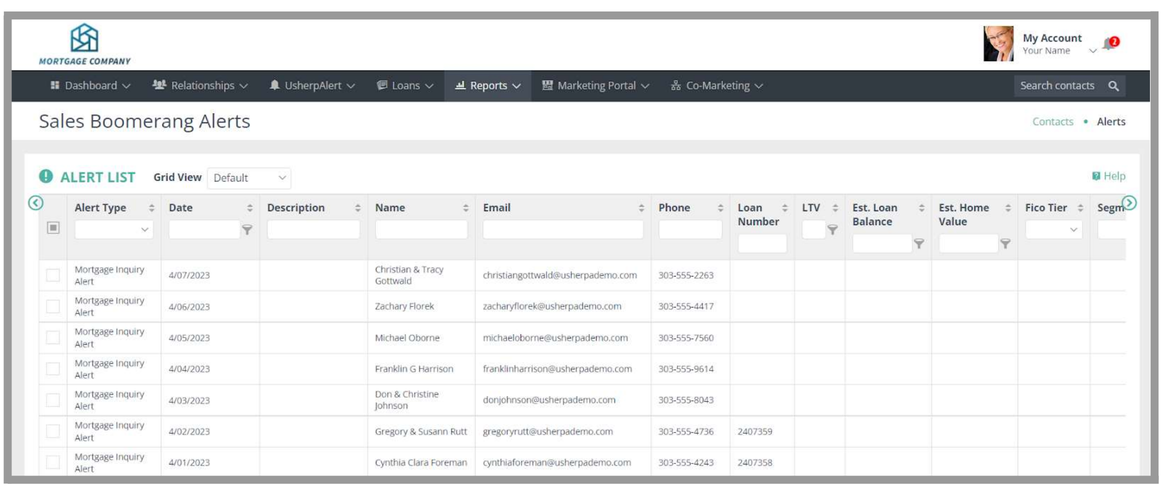
- Click on individual Sales Boomerang alerts in your Usherpa dashboard to bring up all the information needed to make a phone call or email. You can then add a note, and set the action/disposition taken:



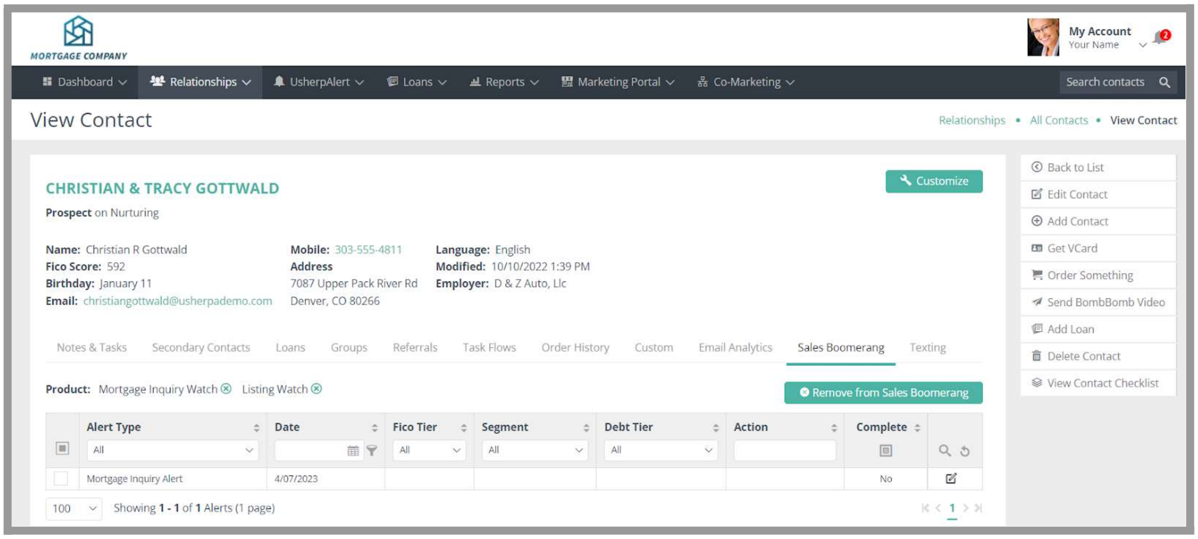
- You can also configure a follow up task:



- If you click *More Details* in My Dashboard, you are taken to a page listing all of your Sales Boomerang alerts. The grid view is completely customizable with the information you would like to see:



- In the individual contact record, the Sales Boomerang alerts display on the *Relationships* tab:



More Information

For more information, email the Sales Boomerang Integrations team at integrations@salesboomerang.com.