Integration Guidelines:
Sales Boomerang & Total Expert

Integrating Sales Boomerang with your Total Expert CRM (Customer Relationship Management) delivers timely borrower intelligence directly to your *User View* 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 automated journeys for borrowers and prospects.

Enabling the Integration

We recommend that you give Total Expert advance notice that you will be working with Sales Boomerang on this integration. In order for work to begin, Total Expert requires a Statement of Work for onboarding Sales Boomerang to be signed.

To get started, have your organization's Sales Operations Manager or other CRM subject matter expert contact your Customer Success Manager at Total Expert and assigned Integration Manager at Sales Boomerang, respectively.

While the level of effort to set up integration will vary based upon your Total Expert instance, our clients report that on average they spend **less than an hour** on integration tasks. At a high level, these tasks will include:

- Determine the types of records to put into Sales Boomerang and confirm data sent
- Review the test alerts sent into Total Expert
- Work with Total Expert to verify workflows/journeys for each Sales Boomerang alert type
- Verify that your data set in Sales Boomerang has the correct Total Expert CRM ID and User email on the records. If the client has a current dataset in Sales Boomerang, we typically recommend purging the current Sales Boomerang data set and having Total Expert provide a new data set.

At onboarding, a list of identified Loan Officers are enabled for sending Total Expert records to Sales Boomerang via the integration API. If not originally identified, an individual Loan Officer or other user would need to authorize record sharing inside Total Expert:

1. Click **Integration Settings**
2. Select *Sales Boomerang* from the list
3. Click **Connect**

Once leads can flow to Total Expert, you may create workflows, assign Tasks to your users, and create journeys to initiate outreach. If you require assistance with this, you may engage with the Total Expert Professional Services team.

How It Works

Data exchange between Sales Boomerang and Total Expert works as follows:

- **Sending Records** - There are two ways to send data from Total Expert to Sales Boomerang: Sales Boomerang Automated Record Allocation or Sales Boomerang Values and Criteria, each optionally combined with the Total Expert Outbound Data Connector (ODC).

  o **Total Expert Outbound Data Connector (recommended) -** Released in February, 2023, Total Expert's native ODC feature may be leveraged to send data to Sales Boomerang; it cannot be used to deliver historical data. The ODC gives you the ability to control how often updates are sent from Total Expert to Sales Boomerang, potentially sending more frequent updates than other methods. Refer to the section below entitled *Outbound Data Connector* for details.

  o **Automated Record Allocation -** If Sales Boomerang Automated Record Allocation is in use, monitoring is controlled by the prerequisites set (to which each record must conform to be tracked).

  o **Sales Boomerang Values and Criteria -** If Automated Record Allocation is not in use, Total Expert can push data to Sales Boomerang based on the following states for individual watches:

    ▪ **Credit Improvement Watch:** When a contact is created or updated with the credit watch flag from the LOS. The custom field *cx.creditwatch* = TRUE.
    ▪ **Mortgage Inquiry Watch:** When a contact is created or updated with the market watch flag from the LOS. The custom field *cx.marketwatch* = TRUE.
    ▪ **EPO (Early Payoff) Watch:** When a contact is created or updated with the market watch flag from the LOS ***and*** the funded date is within the last 6 months. The custom field *cx.marketwatch* = TRUE.
    ▪ **Listing Watch:** When a contact's loan status is updated to "Closed", then the contact will be automatically enrolled in Listing Watch if that watch type is enabled.
    ▪ **Rate Watch:** When a contact's loan status is updated to "Closed", then the contact will be automatically enrolled in Rate watch if that watch type is enabled.
    ▪ **Equity Watch:** When a contact's loan status is updated to "Closed", then the contact will be automatically enrolled in Equity Watch if that watch type is enabled.
    ▪ **Additional Watch Types:** For these Sales Boomerang watch types, the record is enrolled based on prerequisite criteria that each client may customize: Rate-and-Term, Cash-out, FHA MI Removal, Reverse Mortgage, Life Events, and Risk and Retention.

trustengine

- **Receiving Alerts** - Alerts are sent to the Loan Officer's User View within Total Expert. They are generated in Sales Boomerang based on the watch settings for each watch type, and then sent to Total Expert via API. (e.g. You set a minimum FICO score for a Credit Improvement alert to trigger.) The alerts will appear in Total Expert within 2 hours of Sales Boomerang receiving the alert.
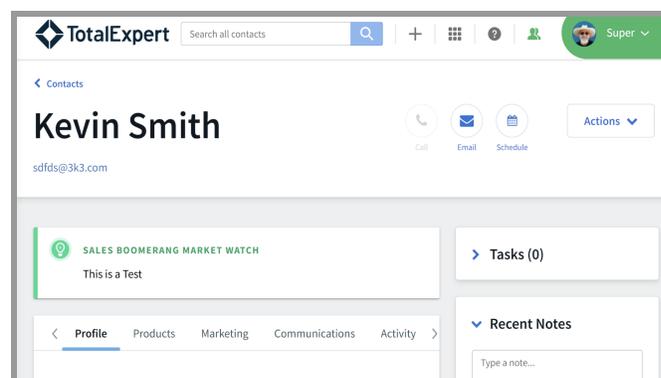
Please note: The Total Expert CRM ID and User email must match between Sales Boomerang and Total Expert for the alert to be successfully delivered to Total Expert.

The Sales Boomerang Alert will show in the User View within the Contact Record in Total Expert.

- **Updating Records in Total Expert** - No existing Total Expert data is altered. Sales Boomerang sends the Alert Category, Alert Description, Alert Date Time, User Email, Total Expert CRM ID (Total Expert's individual Record ID), and the Total Expert Insight ID (this controls what workflow/journey happens when the alert deposits into Total Expert).

Outbound Data Connector

To use the Total Expert Outbound Data Connector (ODC), you must first ensure you have the ODC permission active in Total Expert. If you are unsure if this feature is available to you, reach out to support@totalexpert.com or your Total Expert Customer Success Manager.

Once ODC permission is active, complete the steps below to create an ODC to send data to Sales Boomerang.

1. Select **Outbound Data Connector** in the left-hand navigation.
2. Click **Create a New Connector.** Complete each section on the resulting dialog, as detailed below.
3. **Connector Basics** - Configure these as follows:
   a. **Name** - Enter the name to display in the 'Push Service' in both the Contact record, and in borrower journeys (e.g. Sales Boomerang).
   b. **Automation Sync -** Choose to automatically sync each record *on creation, on deletion,* and/or *on update*. More deliberate automation may be configured as part of borrower journeys.
   c. **Entity Type** - Connect either *Contacts* or *Loans*, based on the following logic:
      i. Contact ODCs may be used in Journeys, but Loans cannot
      ii. Contact ODCs do not include loan details (e.g. rate, purpose, co-borrower)

iii. Loan ODCs are preferred if you wish to send ALL created or updated loans to Sales Boomerang.

iv. Select **Next** to continue.

4. **Authentication** - Leave the value at *None*. Select **Next** to continue.
5. **Data Request** - Complete the following fields:
   a. **URL** - Enter *https://api2.salesboomerang.com/api/lead/create/bulk* to send data to Sales Boomerang.
   b. **Method** - Select *POST*.
   c. **Request Body** - The content varies based on the Entity Type selected above. For either Contact or Loan, you can copy/paste the code sample provided in our *ODC Code Samples* document, but may also add additional liquid logic in other fields to Sales Boomerang, selecting data properties from the list at right.

   Note that the data in parentheses are Sales Boomerang fields, while the data in brackets are from Total Expert.

   Once your Request Body is complete, select **Next** to configure the Success Criteria.

6. **Success Criteria** - Configure this section to show that *StatusCode equals 200*.

Select **Save & Publish** to make the configured ODC available to all users in your selected roles. If you configured the Entity Type *Contacts,* the ODC will also be available to your borrower journeys. If needed, you can click **Save** to save your work and revisit later for publication.

Making the Most Out of Borrower Intelligence

To utilize Sales Boomerang alerts with your Total Expert account, review the steps below to best leverage Total Expert journeys, Tasks, Focused Views, and the ODC.

Total Expert Journeys and Best Practices

Upon activating the integration, Total Expert will make two journeys available to your Marketing admin to utilize. These are relevant to the Credit and Mortgage Inquiry (Market) watch types and include customer outreach templates.
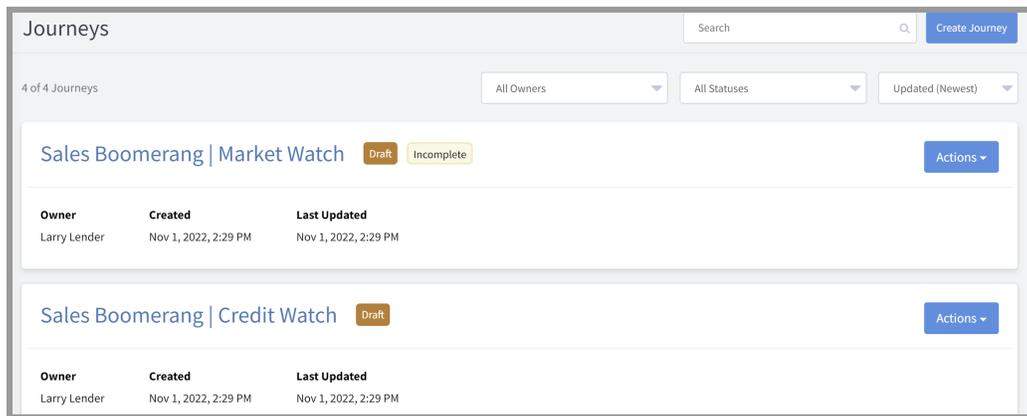
The Market Watch journey (based on a Mortgage Inquiry alert) maps out the timing and content of automated lender outreach to the borrower. It looks like this by default:
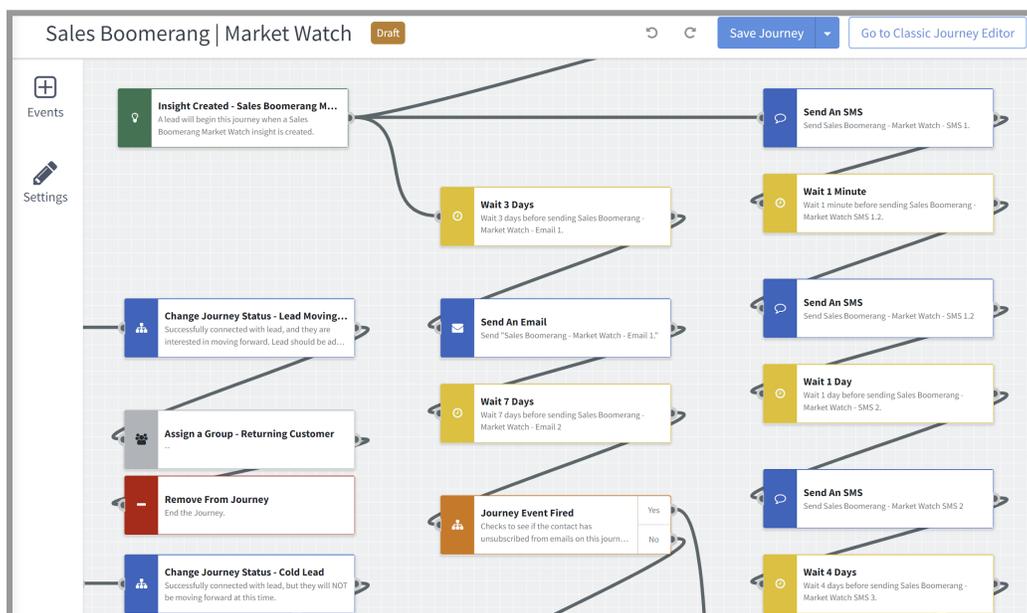
You may modify these existing journeys and/or copy and edit them to create new ones for the other watch types. If you require assistance, you may engage with the Total Expert Professional Services team.

Tasks and Focused Views

Additional features that have been found useful with the Sales Boomerang integration include the use of Tasks and Focused Views within Total Expert.

- **Tasks:** You can create Tasks inside of a Journey and assign them to a Total Expert User with specific outcomes and details. In the example shown next, we are assigning a task to the Loan Officer for first outreach to the borrower via phone call; tasks might also include text messages or emails at specified times.

- **Focused View:** This feature allows you to give your users in Total Expert a list of high-value action items related to their contact records:

Using the ODC

When you are using the Outbound Data Connector with borrower journeys or other follow-up, please note that:

1. A Contact ODC will not be available to use in the Contact record itself.

2. A Contact ODC may, however, be used as a Push Contact Action in a journey. Note that a Loan ODC *may not* be used in a journey.
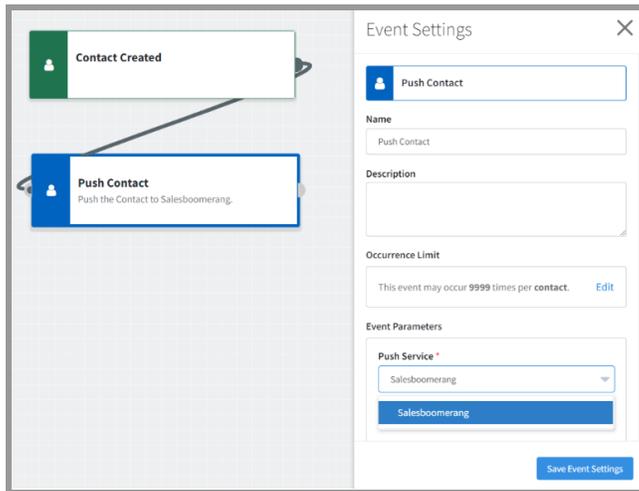
3. Both a Contact ODC and a Loan ODC may be selected as a Push action in the Actions drop-down in the Loan View:
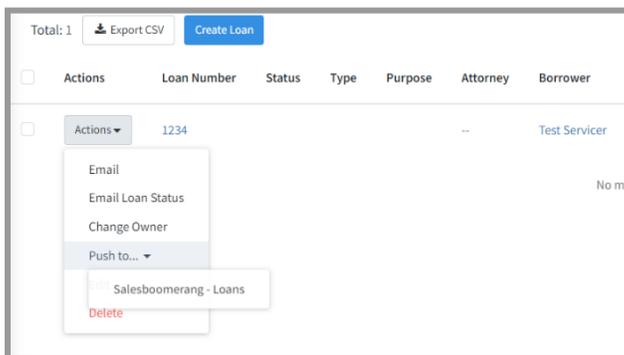
For support assistance with ODC, you may reach out to support@totalexpert.com or your Customer Success Manager. You may also engage with Total Expert's Professional Services group for consulting hours for additional training, creation and support of ODCs and journeys (fees may apply).

More Information

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

trustengine