Lumi / Salesforce Zapier Integration

To make it easier for our partners to automatically submit their leads to Lumi without doing a full API integration we have created an integration with Zapier.

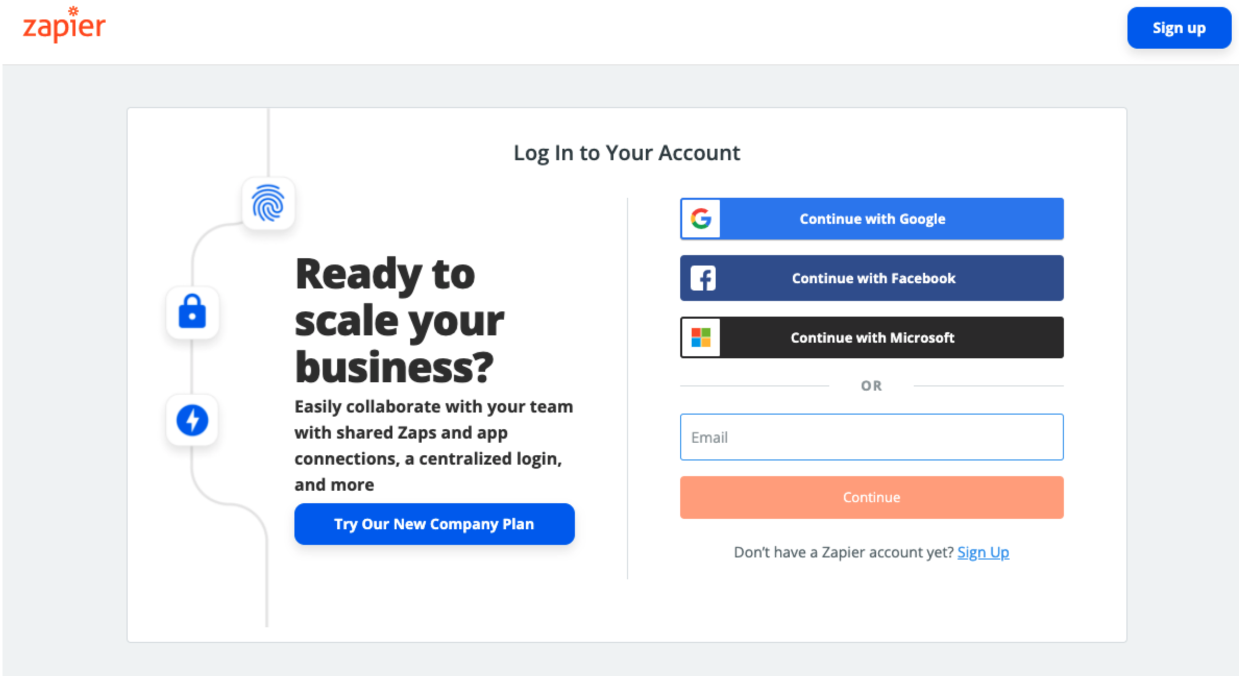
Zapier is a no-code tool that is used to integrate web apps with each other, it is primarily used for automating workflows. Zapier allows users to construct these workflows based off of events, some examples:

- When a row is added to a Google Sheet, send an email from Gmail
- When a new contact is added in Hubspot, send a Slack message
- **When a new record is added to Salesforce, create a lead with Lumi**

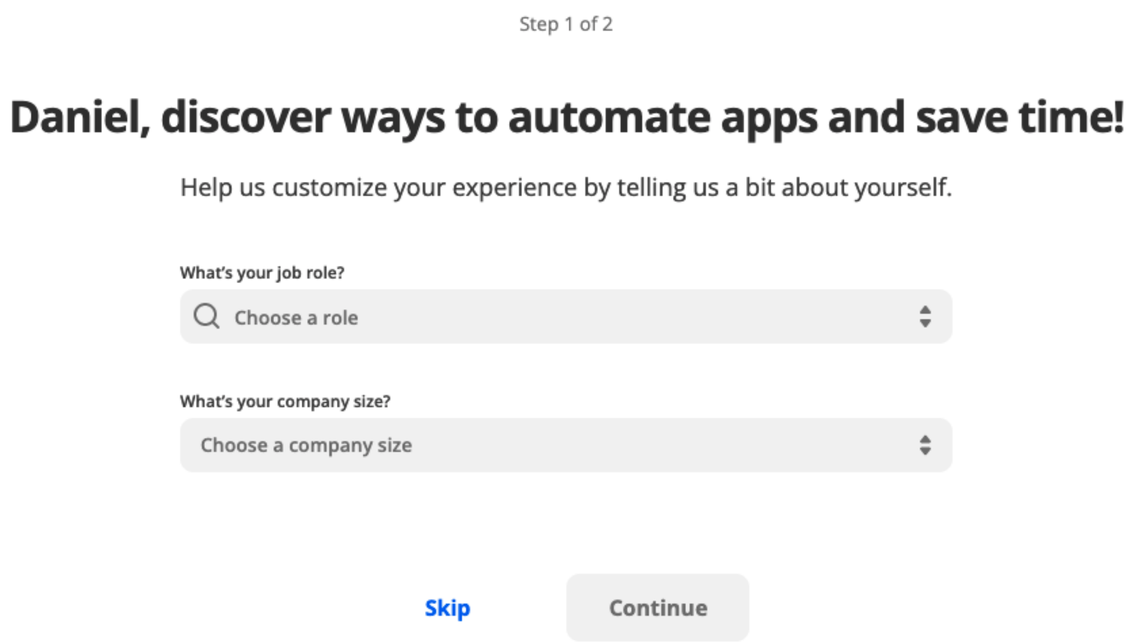
This document is a guide on how to set up a Zapier workflow (called a Zap) that will create a lead with Lumi based off of updates in Salesforce.

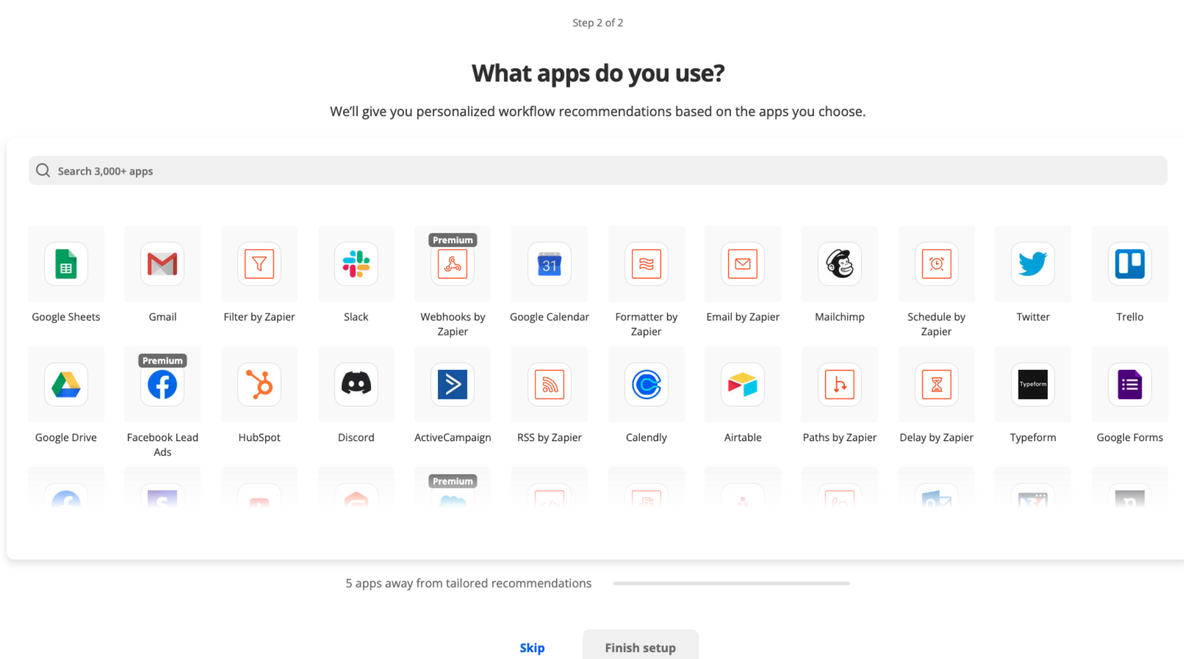
First off, you will need to be invited to use the Lumi Zapier App. You can send a request to support@lumi.com.au for an invite, or get in touch with your Account Manager who will be able to help you.

Once you have your invite link, you will be sent to this screen:

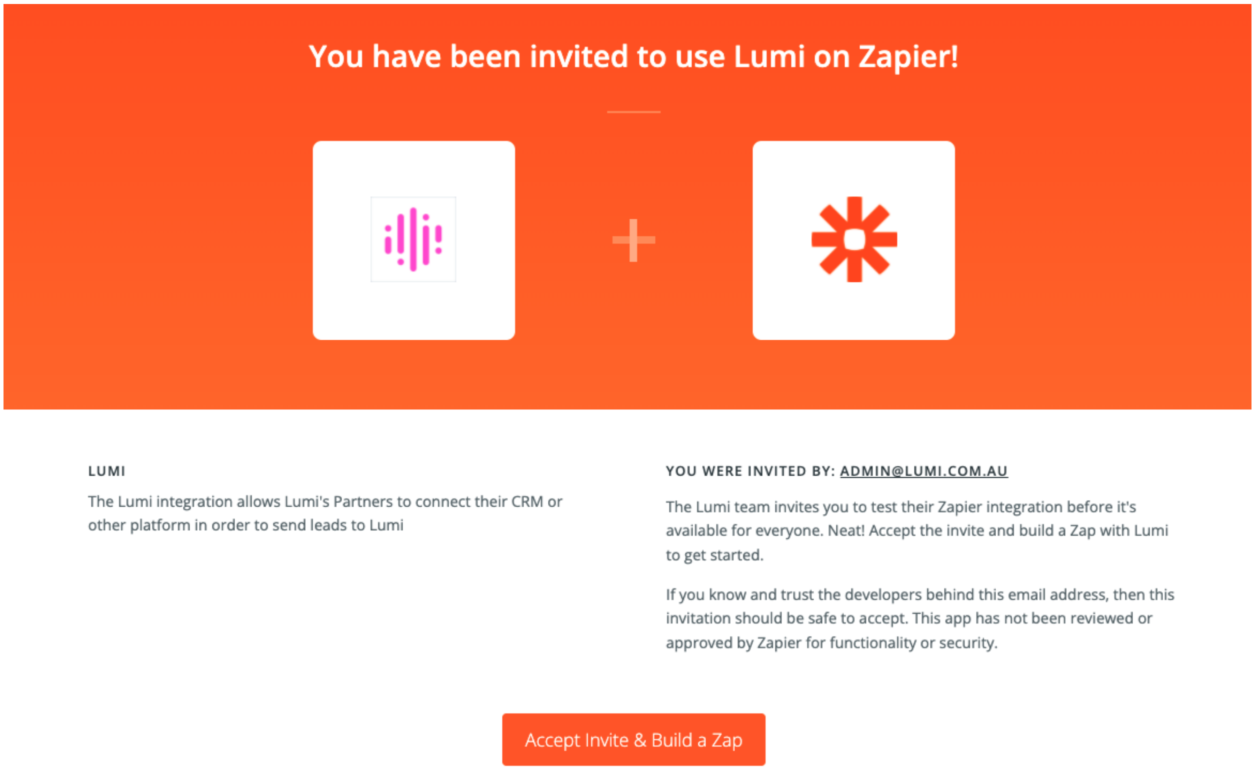


Here, if you've used Zapier before you can log in, else you can sign up. If you are signing up for the first time you will be shown the following two screens, which you can fill out or skip for now. You don't need to fill these out to integrate with Lumi.

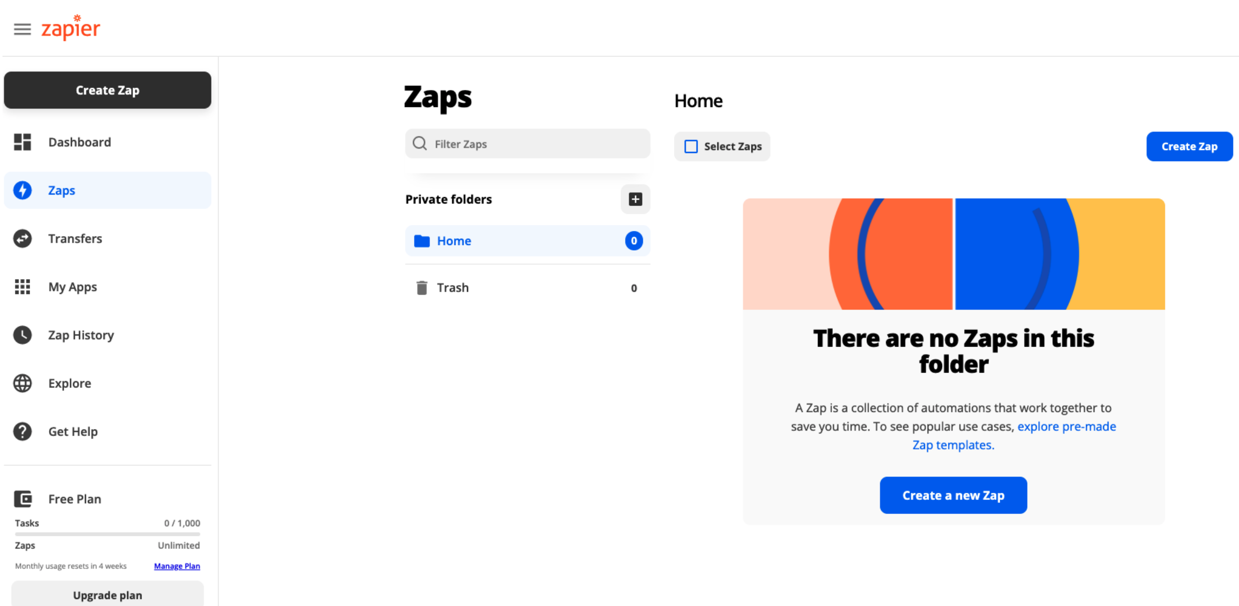




Once you've done that, you'll be shown this screen:

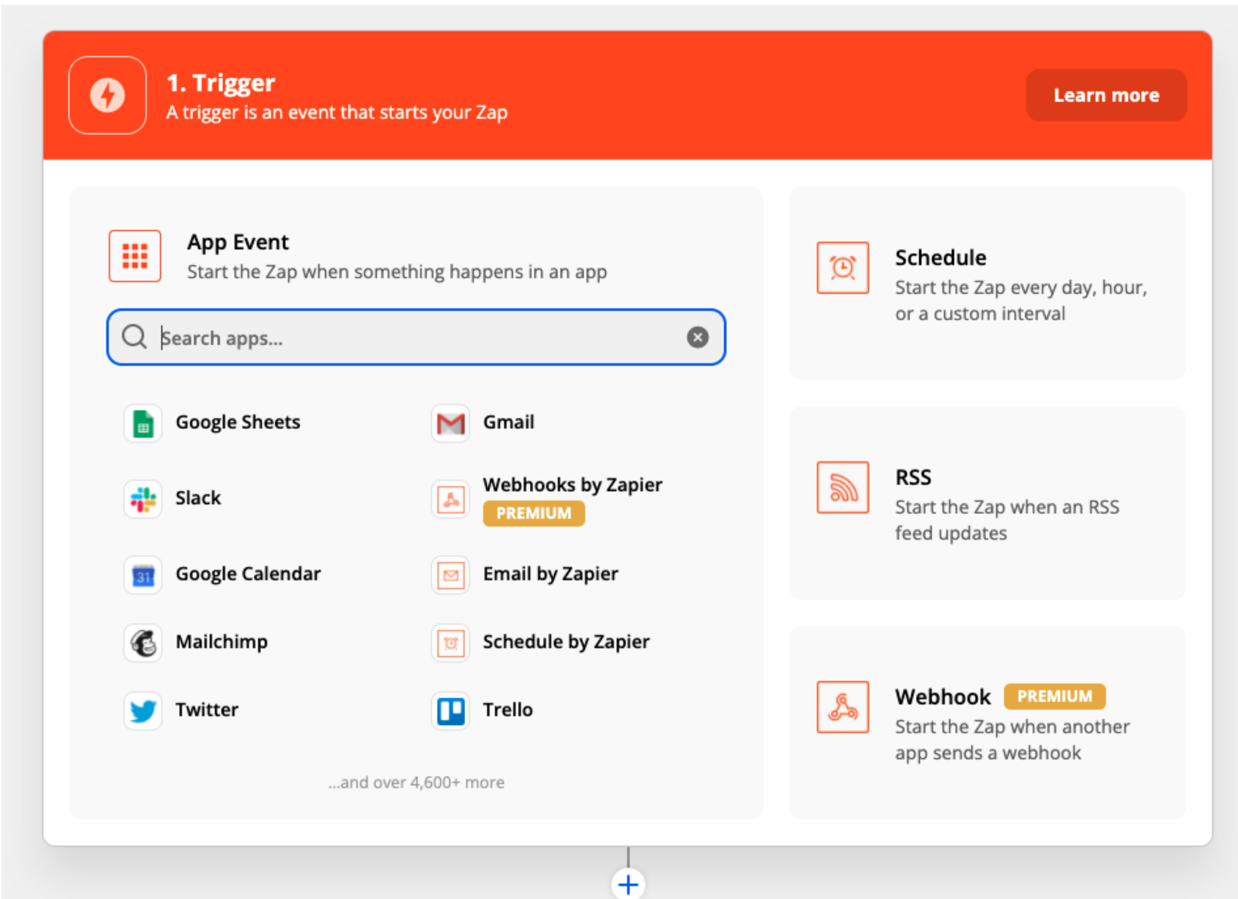


Hit “Accept Invite & Build a Zap” and you’ll be brought to the Zapier dashboard. Once there you need to press the “Create Zap” button:

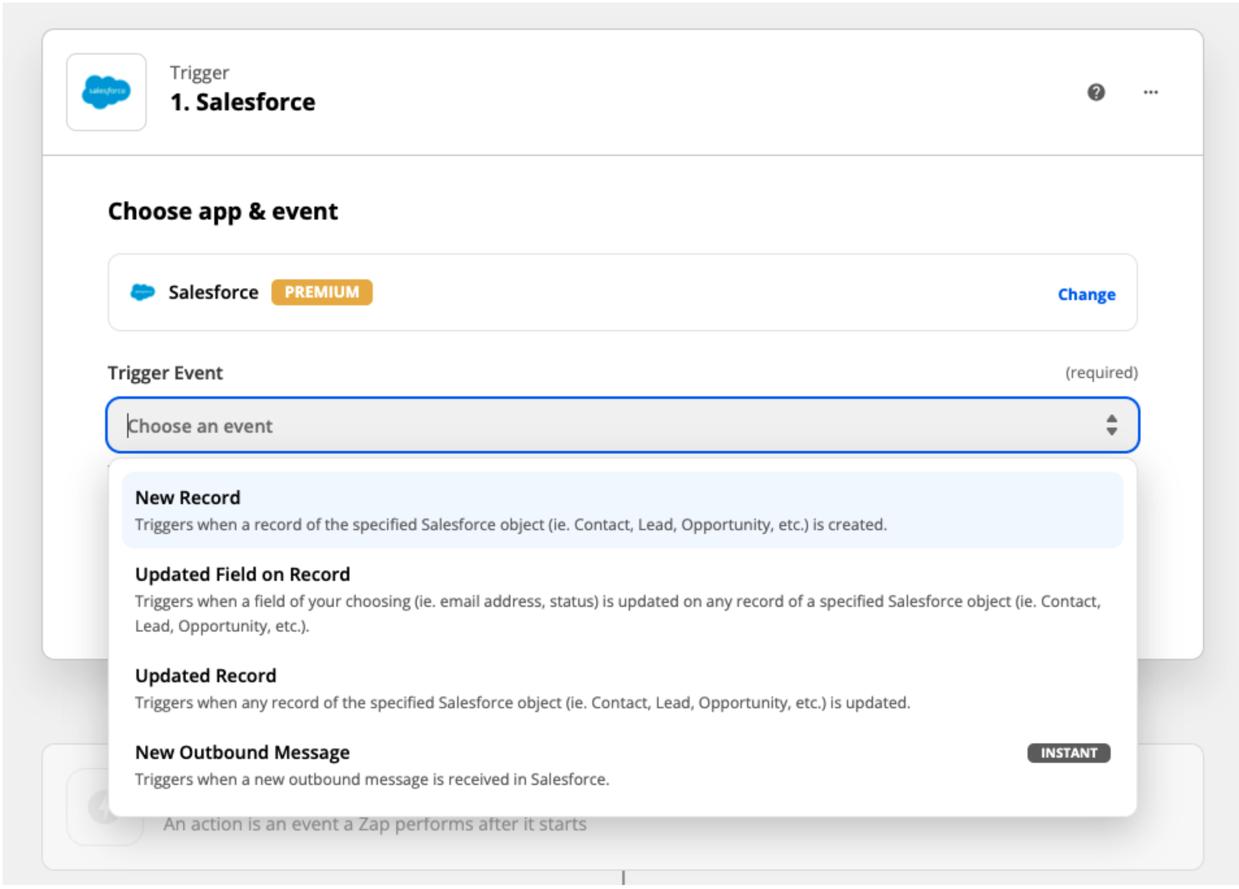


For Zap creation basics you can read through https://zapier.com/help/create/basics/create-zaps.

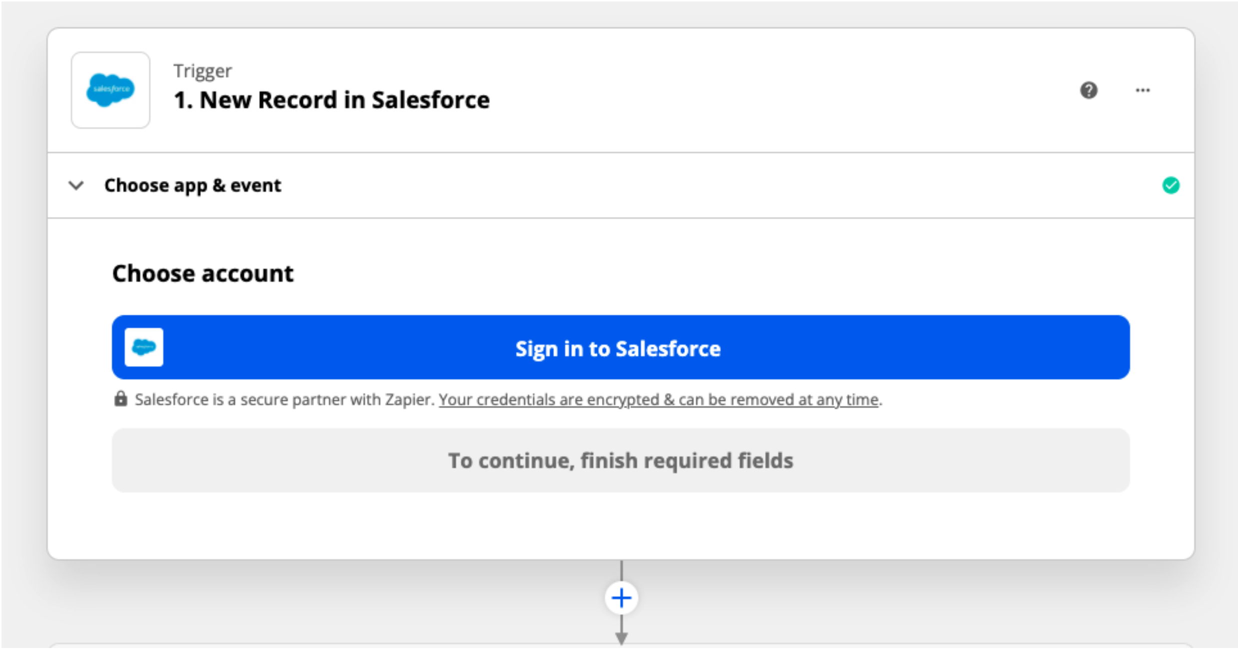
Basically, we need to add a Trigger (in our case a record being added in Salesforce) and an Action (creating a lead with Lumi). Press add trigger and you'll be shown this screen:



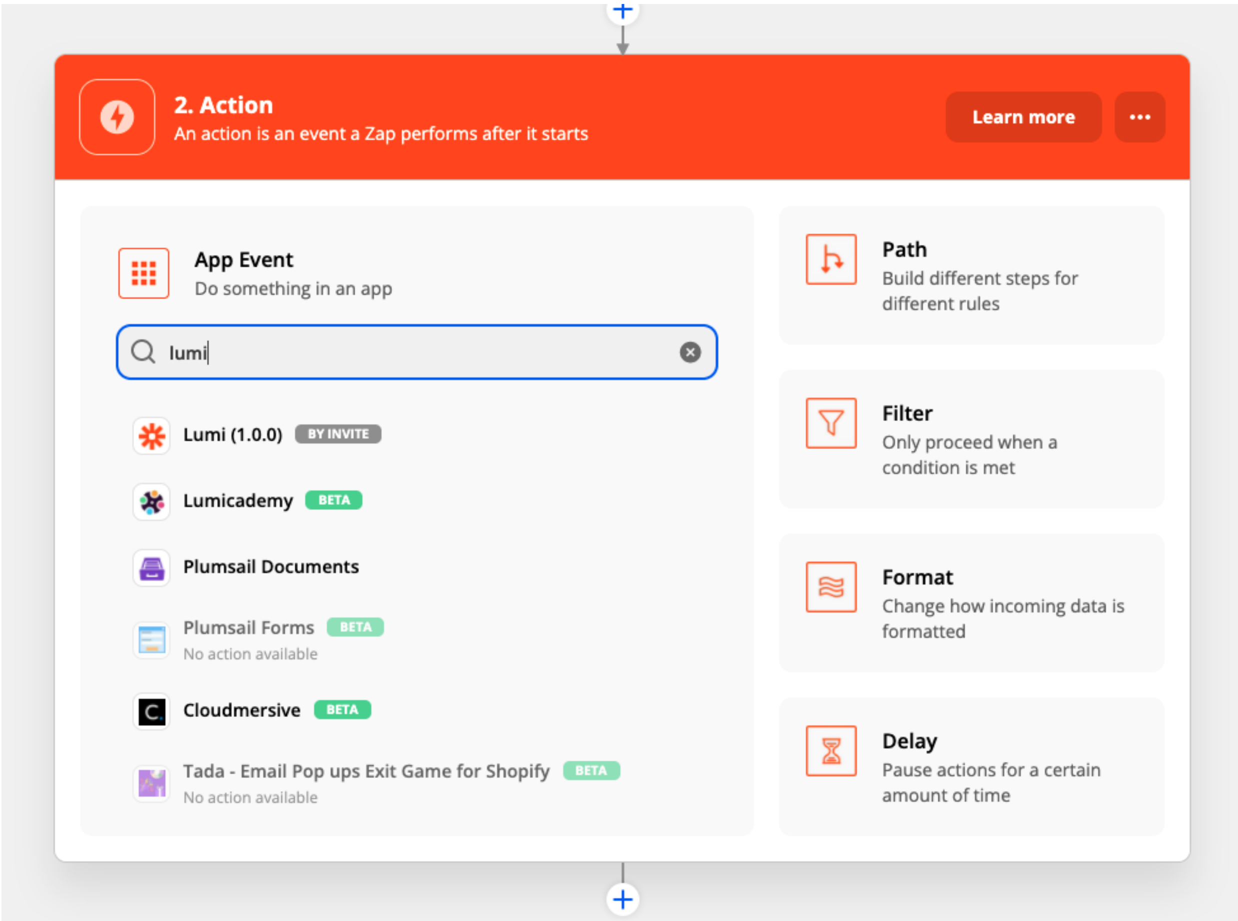
Search for "Salesforce" and select it. Now you can select an event to base the trigger on. For our example here, we'll choose "New Record", which will create a lead with Lumi for every new record added to Salesforce. You can change this for your use case, maybe you'd want to only create a lead with Lumi when a certain field on your Record is updated, in that case you'd select the second option in the drop down below:



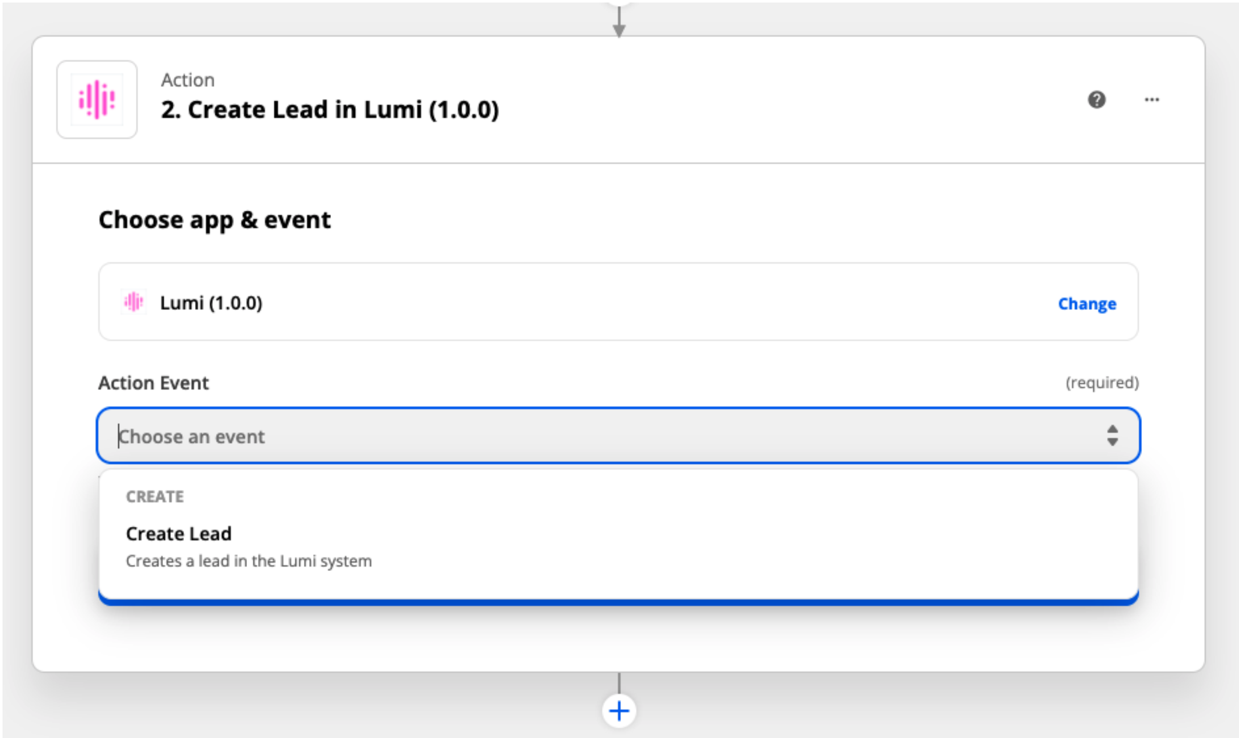
Once that’s done you can login in to your Salesforce account. You’ll be asked to test your trigger to make sure Zapier can successfully access Salesforce. For more information on the Salesforce Zapier Integration, please see https://zapier.com/apps/salesforce/integrations.



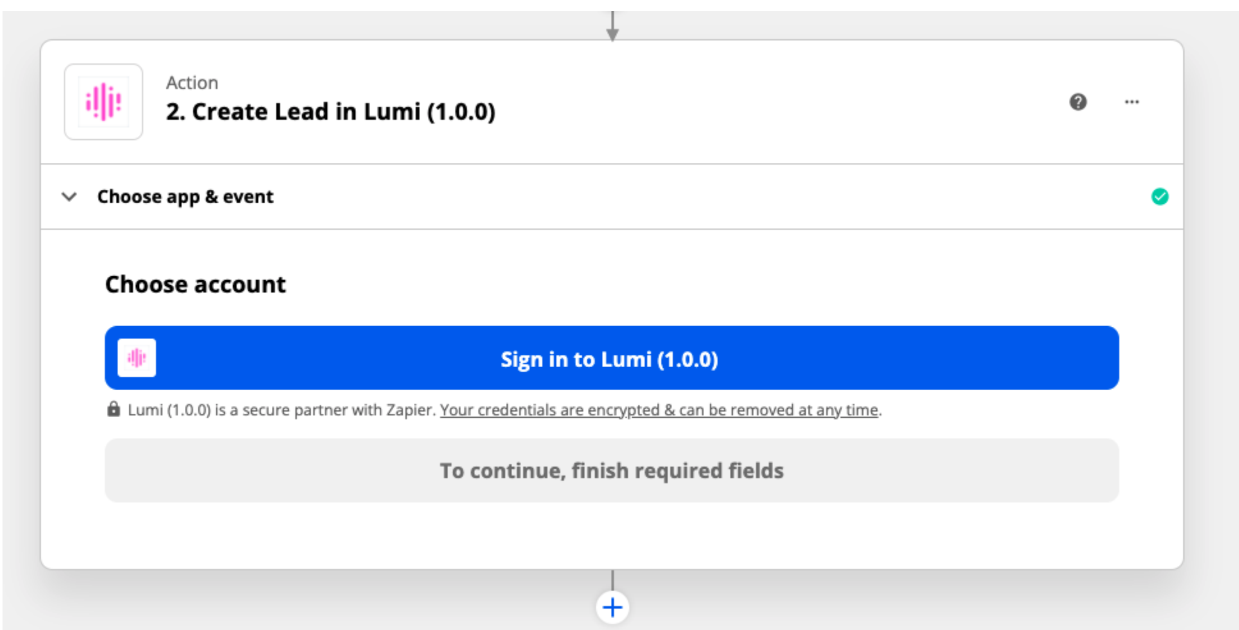
Now, we can add an Action. Search for “Lumi” in the Action screen:



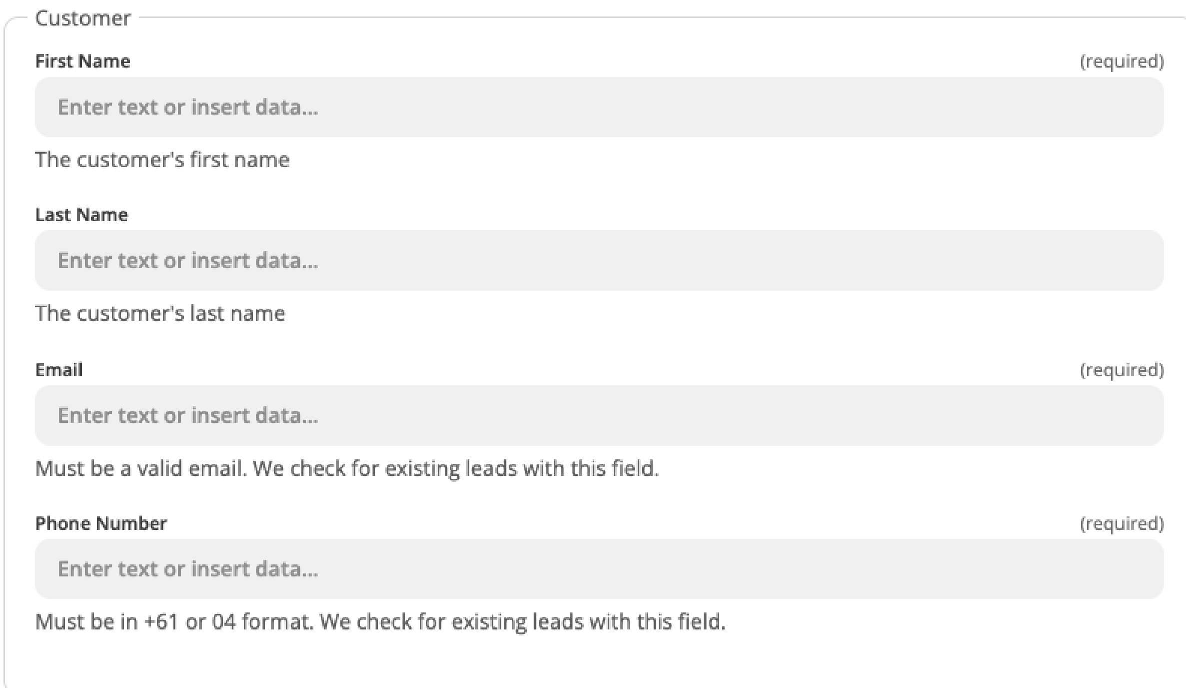
Now, select “Create Lead” as your Action Event.



Once this is done, you'll be prompted to login in with your Lumi details.



Once Lumi has been signed into, you can match fields from your Salesforce record to the fields we require to create a lead. You can see which fields are required on the top right of each field.



Company

Name

Enter text or insert data...

The Name of the company

Months In Business

Enter text or insert data...

Number of months the business has been trading for

Industry

Choose value...

We use the first level ANSZIC codes here
http://www.abs.gov.au/ausstats/abs@.nsf/Product+Lookup/5463F15A4D2FCBA0CA25711F00146D77?opendocument..

Average Monthly Turnover

Enter text or insert data...

ABN

Enter text or insert data...

Australian Business Number (ABN) of the business. Must be a string of length 9 or 11

Loan

Request Amount

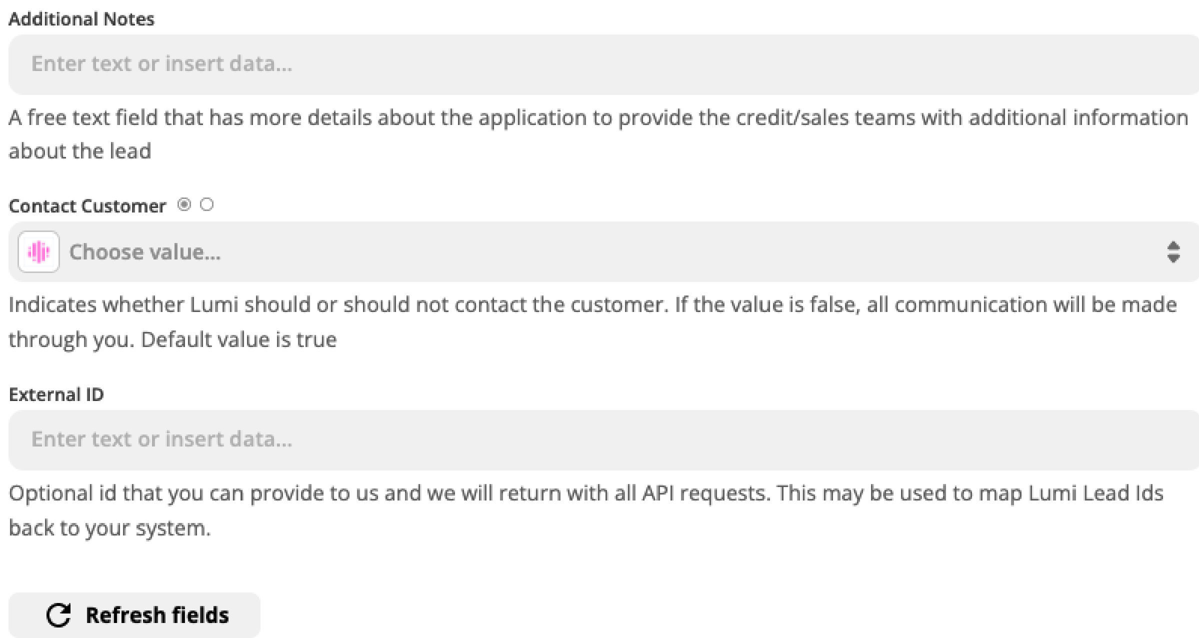
Enter text or insert data...

The requested loan amount. Must be a number between 5,000 and 500,000

Loan Installments

Enter text or insert data...

The term (in weeks) of the loan requested



Once that's done, you can finalise you Zap. Leads will be created then based off the Salesforce action you selected as the trigger for your app!

If you are having problems with this process, please reach out to support@lumi.com.au and we will help get you up and running.