



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.

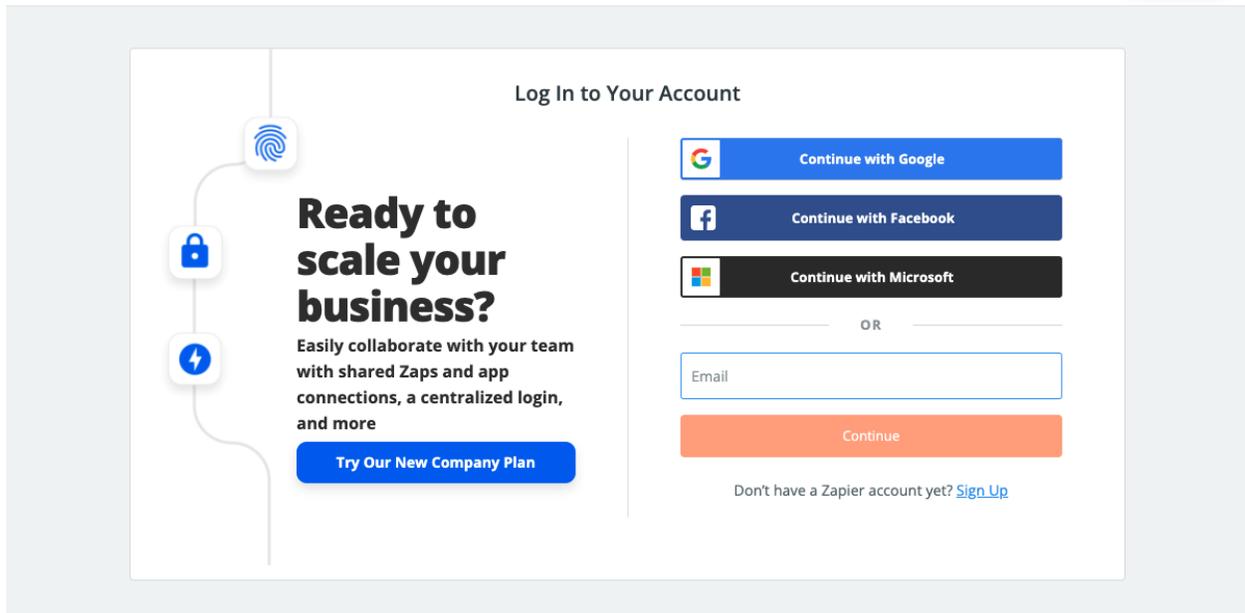
Zapier is a no-code tool that is used to integrate web apps with each other, it is primarily used for automating workflows. Zapier allows users to construct these workflows based off of events, some examples:

- 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:

The image shows a Zapier login page. On the left, there is a vertical line with three icons: a fingerprint, a padlock, and a lightning bolt. To the right of this line, the text reads "Ready to scale your business?" followed by "Easily collaborate with your team with shared Zaps and app connections, a centralized login, and more". Below this text is a blue button that says "Try Our New Company Plan". The main heading of the page is "Log In to Your Account". On the right side, there are three social login buttons: "Continue with Google" (blue), "Continue with Facebook" (dark blue), and "Continue with Microsoft" (black). Below these is the word "OR" in a small font. Underneath "OR" is an email input field with the placeholder text "Email". Below the input field is an orange "Continue" button. At the bottom of the login section, there is a link that says "Don't have a Zapier account yet? Sign Up".

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.

Step 1 of 2

Daniel, discover ways to automate apps and save time!

Help us customize your experience by telling us a bit about yourself.

What's your job role?

What's your company size?

Skip

Continue

Step 2 of 2

What apps do you use?

We'll give you personalized workflow recommendations based on the apps you choose.

Search 3,000+ apps

Google Sheets	Gmail	Filter by Zapier	Slack	Webhooks by Zapier	Google Calendar	Formatter by Zapier	Email by Zapier	Mailchimp	Schedule by Zapier	Twitter	Trello
Google Drive	Facebook Lead Ads	HubSpot	Discord	ActiveCampaign	RSS by Zapier	Calendly	Airtable	Paths by Zapier	Delay by Zapier	Typeform	Google Forms

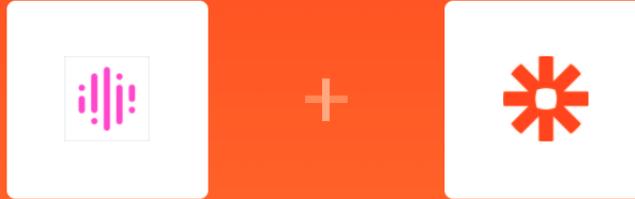
5 apps away from tailored recommendations

Skip

Finish setup

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

You have been invited to use Lumi on Zapier!



LUMI

The Lumi integration allows Lumi's Partners to connect their CRM or other platform in order to send leads to Lumi

YOU WERE INVITED BY: ADMIN@LUMI.COM.AU

The Lumi team invites you to test their Zapier integration before it's available for everyone. Neat! Accept the invite and build a Zap with Lumi to get started.

If you know and trust the developers behind this email address, then this invitation should be safe to accept. This app has not been reviewed or approved by Zapier for functionality or security.

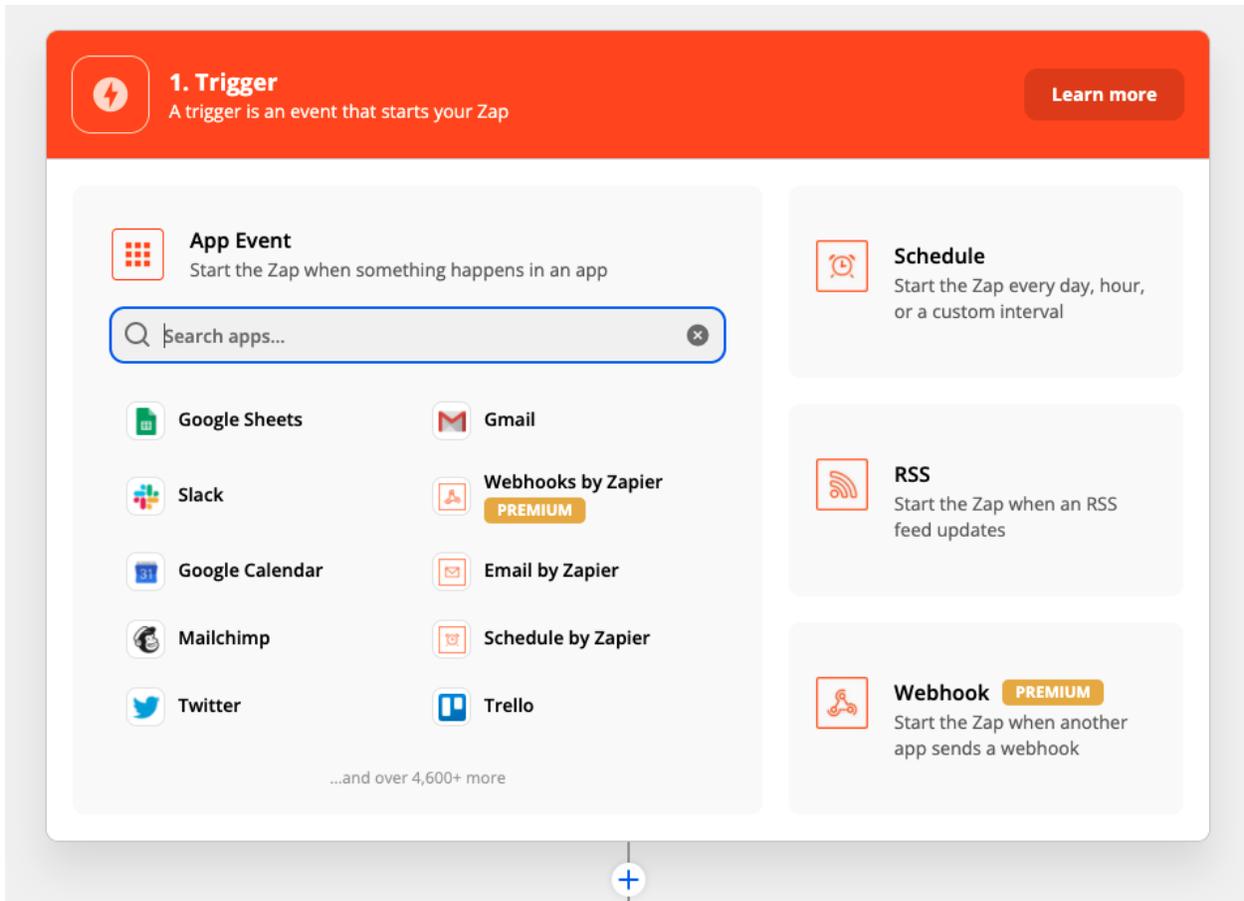
Accept Invite & Build a Zap

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:

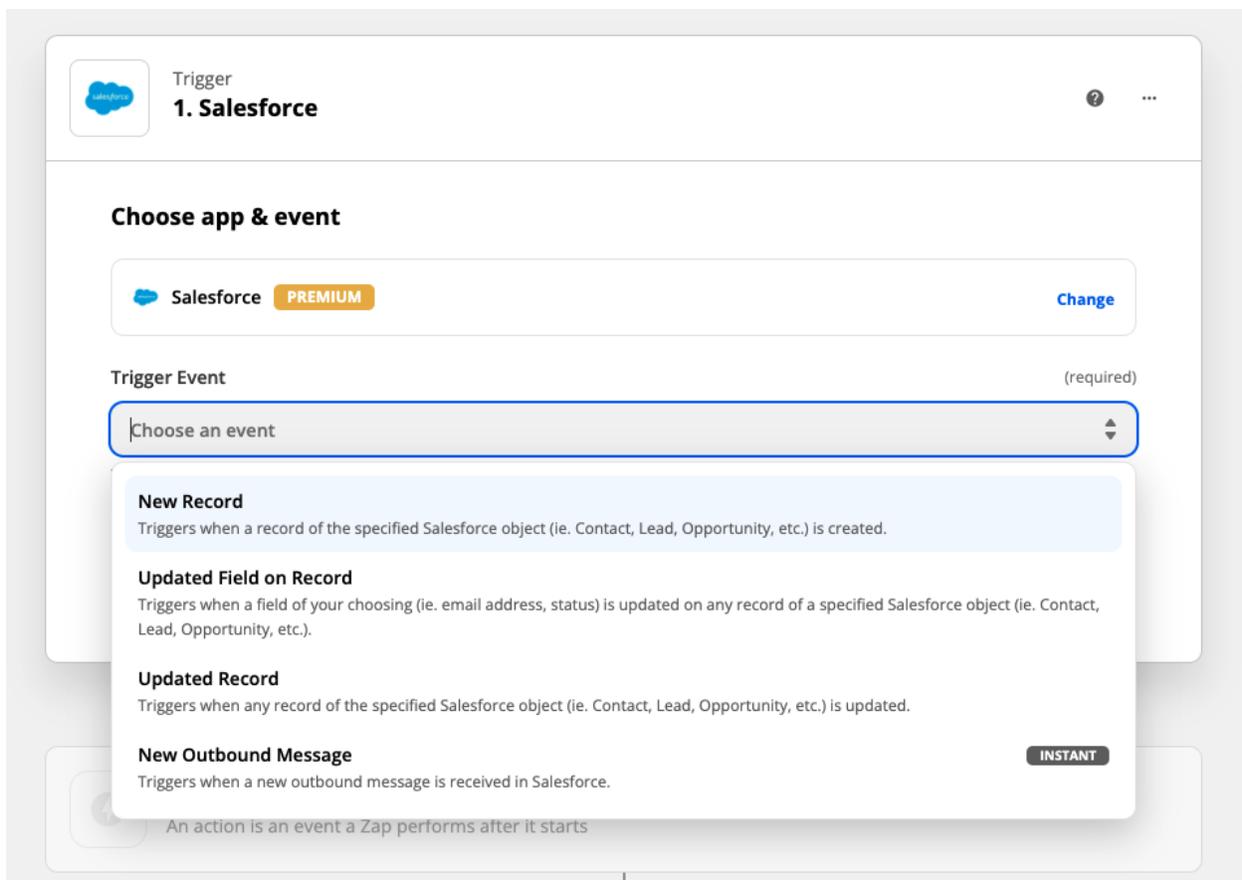
The screenshot shows the Zapier dashboard interface. On the left is a sidebar with navigation options: Dashboard, Zaps (highlighted), Transfers, My Apps, Zap History, Explore, Get Help, and a Free Plan section with usage statistics (Tasks: 0 / 1,000; Zaps: Unlimited) and an Upgrade plan button. The main content area is titled 'Zaps' and includes a search bar for 'Filter Zaps', a 'Select Zaps' button, and a 'Private folders' section with 'Home' (0 items) and 'Trash' (0 items). A large card on the right displays the message 'There are no Zaps in this folder' and includes a 'Create a new Zap' button. The Zapier logo is visible in the top left corner.

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

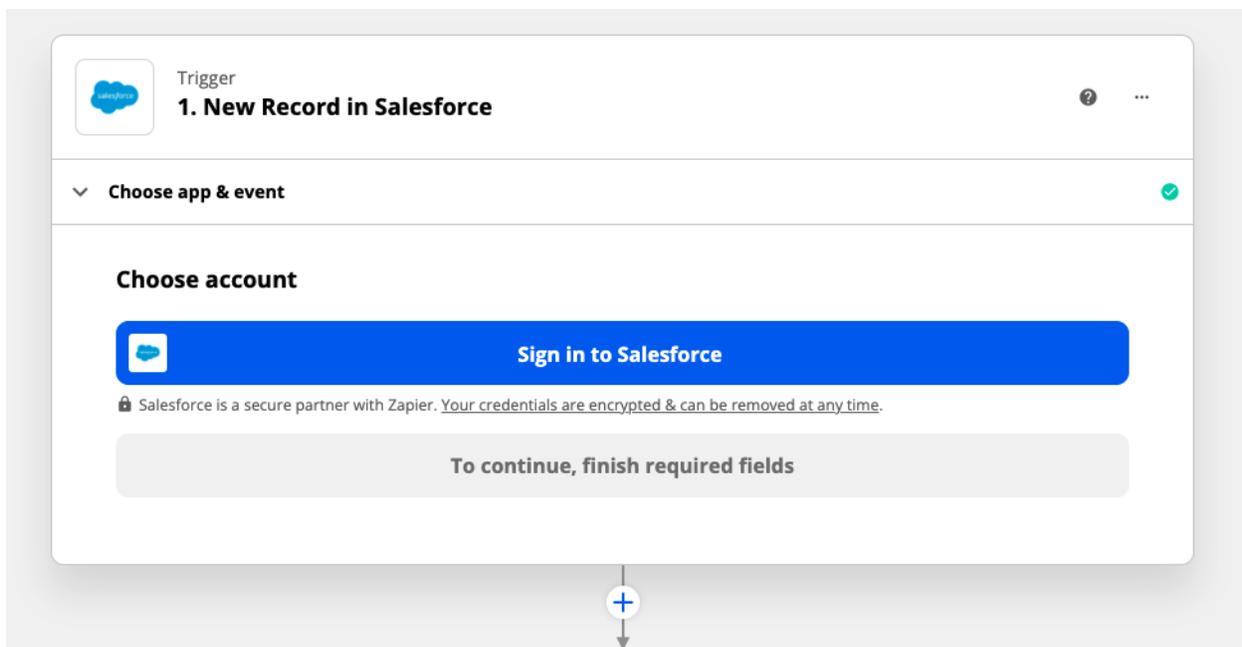
Basically, we need to add a Trigger (in our case a record being added in Salesforce) and an Action (creating a lead with Lumi). Press add trigger and you'll be shown this screen:



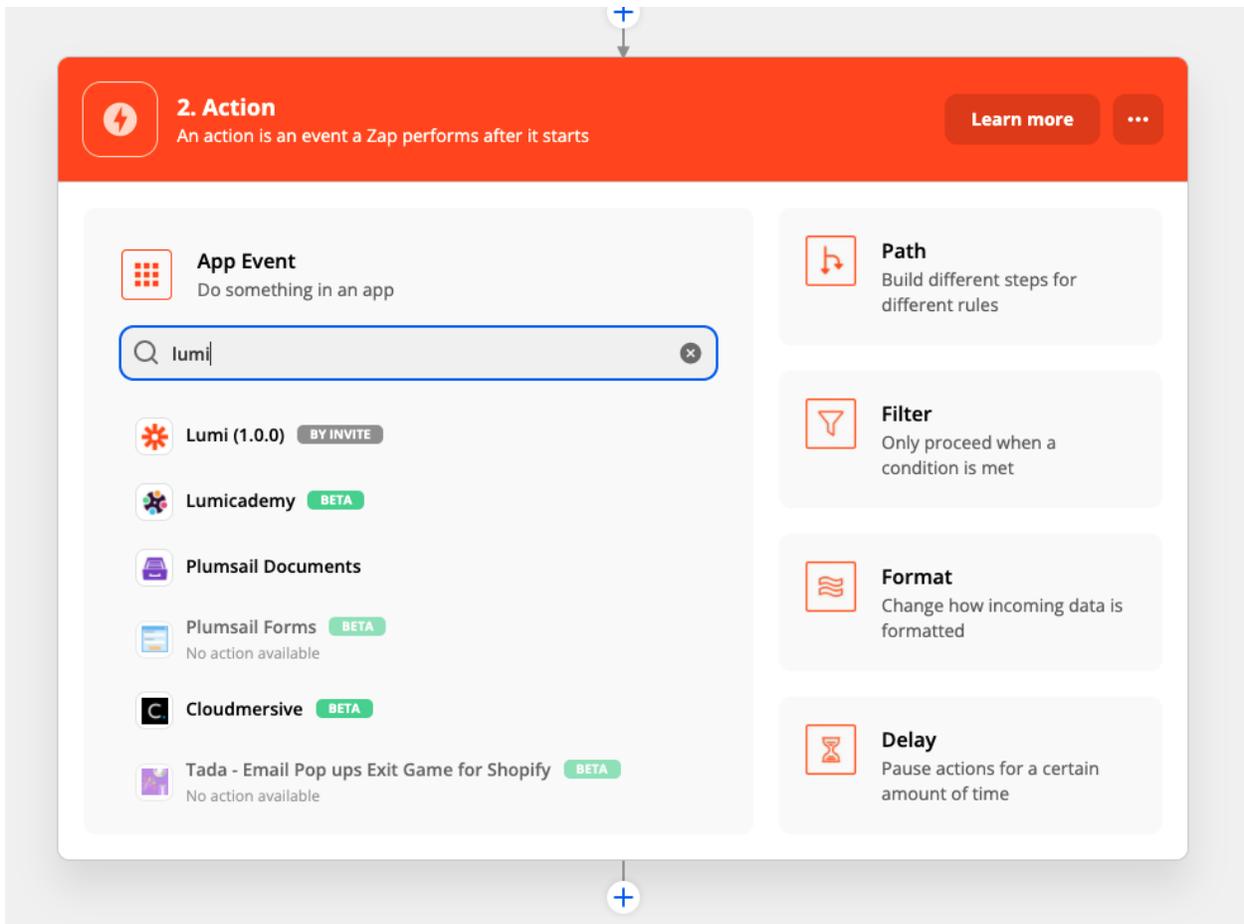
Search for “Salesforce” and select it. Now you can select an event to base the trigger on. For our example here, we'll choose “New Record”, which will create a lead with Lumi for every new record added to Salesforce. You can change this for your use case, maybe you'd want to only create a lead with Lumi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



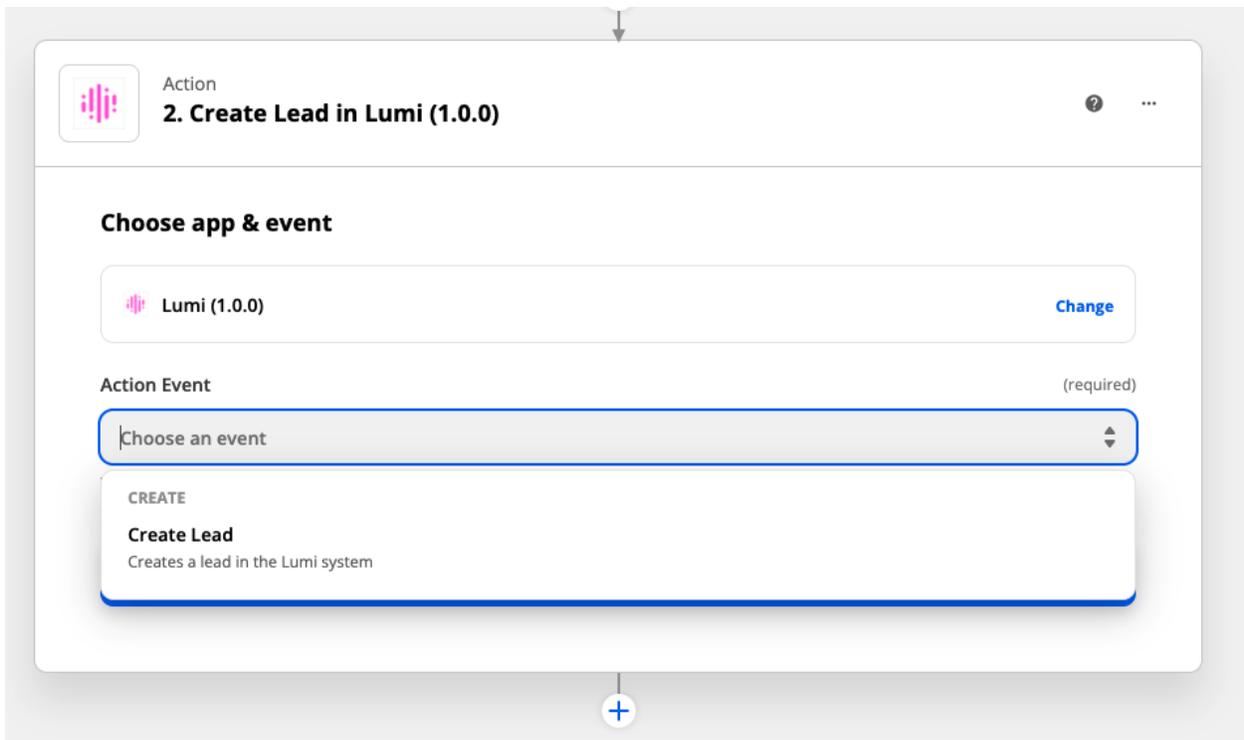
Once that's done you can login in to your Salesforce account. You'll be asked to test your trigger to make sure Zapier can successfully access Salesforce. For more information on the Salesforce Zapier Integration, please see <https://zapier.com/apps/salesforce/integrations>.



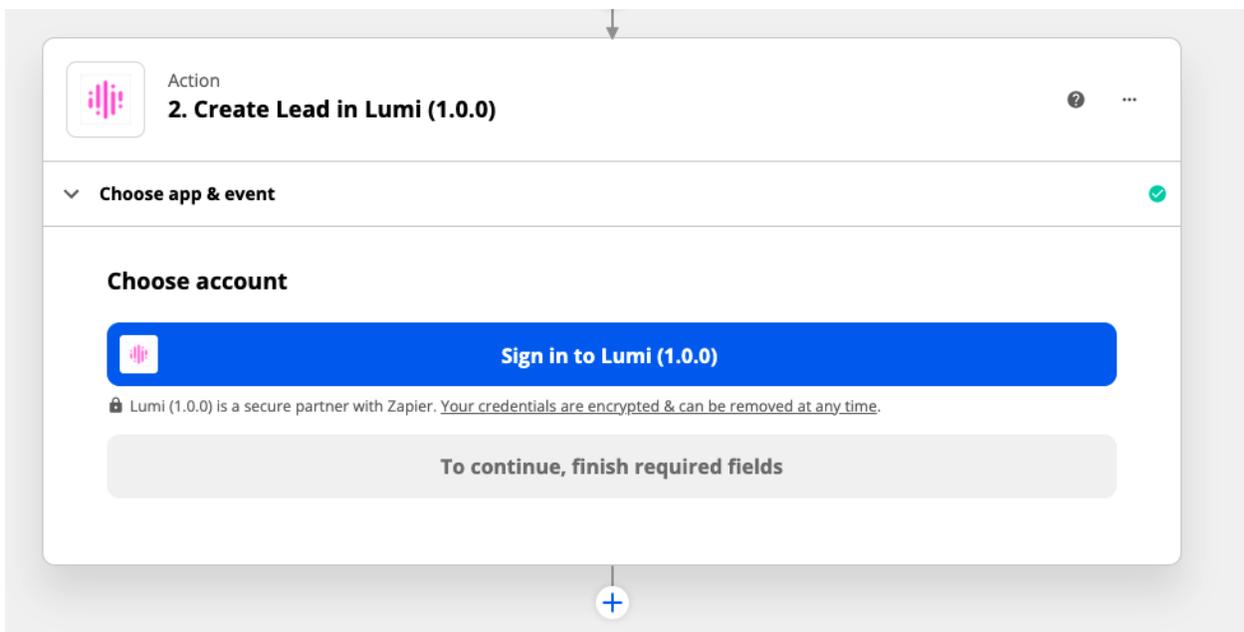
Now, we can add an Action. Search for “Lumi” in the Action screen:



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.

Customer

First Name (required)

Enter text or insert data...

The customer's first name

Last Name

Enter text or insert data...

The customer's last name

Email (required)

Enter text or insert data...

Must be a valid email. We check for existing leads with this field.

Phone Number (required)

Enter text or insert data...

Must be in +61 or 04 format. We check for existing leads with this 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

Additional Notes

Enter text or insert data...

A free text field that has more details about the application to provide the credit/sales teams with additional information about the lead

Contact Customer



Choose value...



Indicates whether Lumi should or should not contact the customer. If the value is false, all communication will be made through you. Default value is true

External ID

Enter text or insert data...

Optional id that you can provide to us and we will return with all API requests. This may be used to map Lumi Lead Ids back to your system.

 **Refresh fields**

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.