Meeting/Project Name:	Lead integration		
Date of Meeting:	May 24th, 2017 & May 25th, 2017	Time:	8:00 a.m. – 6:00 p.m.

Meeting Objective

- Discuss the current lead integration process.
- Document existing lead integration process.
- Discuss the new lead integration process.
- Document new lead integration process (evaluate which logic needs to be supported in the new process).

Attendees

Name
Kim A.
Courtney L.
Jeff M.
Tim G.
Sanjeev P.

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All fields

FIELD NAMES: ALL FIELDS	
Field Names	**Notes**
ALL FIELDS	Trim all values
ALL FIELDS	Send nulls for fields that don't have value in them

Integration

INTEGRATION: MIDDLE LAYER	
Process	**Notes**
LEADS	Don't send duplicate leads to CRM.
	[ACTION ITEM] – Tim to provide the algorithm on what is done today.

Archive

INTEGRATION: DATABASE	
DATABASE	
LENNARWEB	Define a new process to archive data for leads. The community lead table should only have active data for the past 12 months.
LENNARWEB	Define a new process to archive data for leads stored in intermediary table. The community lead table should only have active data for the past 1 months and data that is in error status.

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First name, last name and email address

FIELD NAMES: FIRST NAME, LAST NAME, EMAIL ADDRESS	
Field Names	**Questions**
First Name, Last Name, Email Address	I know this was done for CRM OnDemand but is this valid for Salesforce.com (I don't think so)? Also is this a requirement valid any longer? I know we use a generic email address none@lennar.com when none is populated.

Lennar Meeting Notes

1. The only time the email address, first name and last name will be null is when a prospect visits a Lennar WHC and fills out a registration card.
2. For a lead/contact to be valid in salesforce.com, the lead/contact has to have a valid mobile phone number or email address.
3. In CRM OnDemand, NHCs have to enter none@lennar for the lead/contact to be valid.
4. For lead integration from partners and lennar.com this is no longer valid for us as we will always receive email address, first name and last name.
5. For email addresses that we receive from partner feeds, we will validate them and ensure they are in the correct format.
6. If any landing page that uses the lead webservice sends an invalid email address an email will be sent to lennar.lead.webservice@lennar.com and admins will be required to follow up with agency. Capture email address and landing page name and send to lennar.lead.webservice@lennar.com.
7. If we receive an invalid email address, then the record is set to review status and admins will be required to fix it and reprocess.

Action Items

Action	Owner	Due Date	Status
Define rules for a valid email address and share with partners and microsites	EX2 Developer	06/15/2017	Pending

DECISIONS	
Notes	**Applications**
Change First Name and Last Name to title case	CRM Lead WebService
For email addresses that we receive from partner feeds, we will validate them and ensure they are in the correct format.	CRM Lead WebService & Partners (BDX, etc.)
If any landing page that uses the lead web service sends an invalid email address an email will be sent to lc.is.lead.integration@lennar.com and admins will be required to follow up with agency. In the email body, include the email address, Phone Number, First name, Last name and landing page name and send email to lc.is.lead.integration@lennar.com.	Microsite Lead WebService & CRM Lead WebService & Notification Workflow

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Preferred Language

FIELD NAMES: PREFERRED LANGUAGE	
Field Names	**Questions**
Preferred Language	If null set to ENU; When "Spanish" or "ESP" then set "ESP" else set "ENU" - this overrides any other languages we are sending; Need to know the valid languages in salesforce.com / CRM OnDemand; Should we use 3 digit or 2 digit standards and then which standard should we ISO standards? https://www.the-localization-tool.com/language-codes-mfc https://help.salesforce.com/articleView?id=admin_supported_locales.htm&type=0 https://developer.salesforce.com/forums/?id=906F00000008o2ZIAQ (Web Services API Developer's Guide) https://en.wikipedia.org/wiki/List_of_ISO_639-1_codes https://www.ups.com/worldshiphelp/WS20/ENU/AppHelp/SHIPUPS.htm#Codes/Language_Codes.htm (USE 3 DIGIT STANDARD CODES)

Lennar Meeting Notes

1. Standardize on Preferred language codes. Example: https://www.ups.com/worldshiphelp/WS20/ENU/AppHelp/SHIPUPS.htm#Codes/Language_Codes.htm
2. Shared the codes with CRM ONDEMAND and SALESFORCE.COM team.
3. Match with Janrain implementation
4. When a lead is submitted, the preferred languages will be set to the language that the user is viewing the site in (English, Spanish, Portuguese, and Chinese).
5. When a user logs using social profile using Janrain platform, the preferred languages will be captured. The preferred language will be sent to salesforce.com.

Action Items

Action	Owner	Due Date	Status
Map codes between different platforms and shared the codes with CRM OnDemand and Salesforce.com team	Jeff M. / Sanjeev Puri	06/15/2017	Pending

DECISIONS	
Notes	**Applications**
Use the following codes for Preferred Language: https://www.ups.com/worldshiphelp/WS20/ENU/AppHelp/SHIPUPS.htm#Codes/Language_Codes.htm	CRM Lead WebService & Partners (BDX), Janrain, Salesforce.com, CRM OnDemand
Match with Janrain implementation	CRM WebService & Partners (BDX), Janrain, Salesforce.com, CRM OnDemand

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Zip codes

FIELD NAME: ZIP CODE	
Field Names	**Questions**
Zipcode	ALL SEEMS GOOD - STRIPS ALPHANUMERIC CHARACTERS - IF MAILING TO COUNTRY NOT SURE IF THERE IS MISSING '-' DOES IT MAKE A DIFFERENCE
Lennar Meeting Notes	
1. VALID CHARACTERS - ALPHANUMERIC AND '-'	
Action Items	

Action	Owner	Due Date	Status
No action items for zip code			

DECISIONS	
Notes	**Applications**
VALID CHARACTERS - ALPHANUMERIC AND '-'	CRM Lead WebService & Partners (BDX), Salesforce.com, CRM OnDemand

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Home Phone, Work Phone, Work Phone ext., Fax

FIELD NAMES: HOME PHONE, WORK PHONE, WORK PHONE EXT., FAX	
Field Names	**Questions**
HOME PHONE, WORK PHONE, WORK PHONE EXT., FAX	- Currently the field length is VARCHAR (14) for HOME PHONE, WORK PHONE,FAX - Field length for WORK PHONE EXT is VARCHAR(4) - What is the size in Salesforce.com and CRM OnDemand? - Based on a documentation found online it is 15 characters https://en.wikipedia.org/wiki/E.164 - Remove 0 or 1 from the first position - Set to 14 characters

Lennar Meeting Notes

1. Change the length to 15 characters
2. Do not strip 0s and 1s
3. KIM/CARTER/ATIF/COURTNEY – Do you want to change forms to capture mobile phone numbers? This change will impact Lennar.com forms and myLennar.

Action Items

Action	Owner	Due Date	Status
Kay requested to see how many users have mobile phone numbers.	Courtney Lee	06/15/2017	Pending
Do you want to change forms to capture mobile phone numbers? This change will impact Lennar.com forms and myLennar.	Kay / Kim / Carter/ Atif / Courtney	06/15/2017	Pending

DECISIONS	
Notes	**Applications**
Change the length to 15 characters	CRM Lead WebService, Salesforce.com, CRM OnDemand
Do not strip 0s and 1s	CRM Lead WebService

ASSUMPTION
Notes
Salesforce.com and CRM OnDemand both support 15 characters and Alphanumeric characters.

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State

FIELD NAME: STATE	
Field Names	**Questions**
STATE	- Need a copy of UTLEAD_LKP_STATE - What is the size in Salesforce.com and CRM OnDemand? - We should use ISO standards - US: https://en.wikipedia.org/wiki/List_of_states_and_territories_of_the_United_States) - World is this one https://en.wikipedia.org/wiki/ISO_3166-2 - SUGGESTION: If the country is US then validate state else pass it to the CRM systems

Lennar Meeting Notes

1. US ISO 2 DIGIT; FOR INTERNATIONAL SEND AS IS...
2. IMPACT JEFF M. BOTH CRM ONDEMAND AND SALESFORCE.COM SUPPORT FREE FORM

Action Items

Action	Owner	Due Date	Status
See if there is an impact to CRM OnDemand and Salesforce.com when 2 digit codes are send and for international free text would be sent.	Jeff M.	06/15/2017	Pending

DECISIONS	
Notes	**Applications**
Use ISO 2 Digit	CRM WebService & Partners (BDX), Janrain, Salesforce.com, CRM OnDemand
For international send what user enters on the form	CRM WebService & Partners (BDX), Janrain, Salesforce.com, CRM OnDemand

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Country

FIELD NAME: COUNTRY	
Field Names	**Questions**
COUNTRY	- Need access to UTLEAD_LKP_COUNTRY - Does this use some ISO standard? Example: https://en.wikipedia.org/wiki/ISO_3166-1 being used currently. - SUGGESTION: We should use some standard - Also https://en.wikipedia.org/wiki/ISO_3166-1_alpha-3

Lennar Meeting Notes

1. In the current implementation, Lennar.com send two digit country code. No change required here.
2. In the current implementation, the cleansing and transformation process does a lookup on country code and passes the country name to the CRM application. The change has been made to pass the two digit country code instead of the country name in the development environment.
3. Lennar.com team and Tim need to schedule a date to test this in stage and then rollout the change to production.

Action Items

Action	Owner	Due Date	Status
Change has been made to pass the two digit country code instead of the country name in the development environment. Schedule a date to test this in stage and then rollout the change to production.	Tim & Courtney Lee	06/15/2017	Pending

DECISIONS	
Notes	**Applications**
Tim as made a change to use ISO 2 Digit codes. This needs to be tested in stage and then moved to production.	CRM Lead WebService & Partners (BDX), Salesforce.com, CRM OnDemand
ASSUMPTION	
Notes	
Salesforce.com and CRM OnDemand both support this.	

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Addresses

FIELD NAMES: ADDRESSES	
Field Names	**Questions**
ADDRESSES	Does the address length match up with salesforce.com and CRM OnDemand? - Address1 (100) - Address2 (100)

Lennar Meeting Notes

1. JEFF TO VERIFY: SET ADDRESS1 TO 100 CHARACTERS FOR SALESFORCE.COM AND CRM ONDEMAND;
2. KIM TO VERIFY IF 100 CHARACTERS ARE GOOD IN SALESFORCE.COM

Action Items

Action	Owner	Due Date	Status
Verify data length for address 1 in CRM OnDemand	Jeff M.	06/15/2017	Pending

DECISIONS	
Notes	**Applications**
Kim verified the following: - Address.Street (TextArea, 255 characters) - Address.City (String, 40 characters) - Address.State (String, 80 characters) - Address.PostalCode (String, 20 characters) - Address.Country (String, 80 characters)	Salesforce.com

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Messages

FIELD NAMES: MESSAGES	
Field Names	**Questions**
MESSAGES	- Does this match up with salesforce.com and CRM OnDemand? - The length in LennarWeb is 4000 characters. We will make a change to match to whatever the new requirement is? example: Message (1999)

Lennar Meeting Notes

1. ASK CAO TO ALLOW 4000 CHARACTERS AND CRM ONDEMAND TEAM WILL STRIP IT DOWN TO 1999 CHARACTERS;
2. CRM ONDEMAND - WHO WILL BE REPSONSIBLE FOR STRIPPING TO SEND - ASAD / SHYAM - ?
3. SALESFORCE.COM SUPPORTS MORE THAN 4000 CHARACTERS

Action Items

Action	Owner	Due Date	Status
Lennar.com accepts 4000 characters for comments. Since CRM OnDemand limits this to 1999 characters and Salesforce.com can accept 4000 characters, the process that writes to the CRM OnDemand will be responsible for sending writing only 1999 characters.	Jeff M.	06/15/2017	Pending

DECISIONS	
Notes	**Applications**
Lennar.com will accept 4000 characters	Lennar.com
Salesforce.com will save 4000 characters	Salessforce.com
CRM OnDemand will save 1999 characters	CRM OnDemand

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Reason for move

FIELD NAMES: REASON FOR MOVE	
Field Names	**Questions**
REASONFORMOVE	- This is set to varchar(255) in Tim's process - Does this match up with salesforce.com and CRM OnDemand? - The length in LennarWeb is 500 characters. We will make a change to match to whatever the new requirement is? example: Message (255) - Present on iPad interest list however no longer valid on www.lennar.com

Lennar Meeting Notes

1. LENNARWEB CHANGE TO 255 CHARACTERS;
2. NO CHANGE TO LENNAR.COM;
3. VALID FOR DIVISIONAL LANDING PAGES OUTSIDE OF LENNAR.COM.

Action Items

Action	Owner	Due Date	Status
N/A	N/A	N/A	N/A

DECISIONS	
Notes	**Applications**
On LennarWeb, the character field length will be modified to 255	Lennar.com

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Time spent looking

FIELD NAMES: TIME SPENT LOOKING	
Field Names	**Questions**
TIME SPENT LOOKING	- In LennarWeb it is varchar 50 and in Tim's process it is varchar(40) - What do you want to do with Time spent looking? - Present on iPad interest list however no longer valid on www.lennar.com

Lennar Meeting Notes
1. CHANGE TO VARCHAR (50)

Action Items			
Action	**Owner**	**Due Date**	**Status**
N/A	N/A	N/A	N/A

DECISIONS	
Notes	**Applications**
Change field length to 50 characters	Salessforce.com
Change field length to 50 characters	CRM OnDemand

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Inventory Flag/ Inventory Address

FIELD NAMES: MESSAGES	
Field Names	**Questions**
INVENTORY ADDRESS	- This is set to varchar(255) in Tim's process - The length in LennarWeb is varchar(50)

Lennar Meeting Notes
1. RESTRICTION DUE TO JDE ADDRESS FIELD

Action Items			
Action	**Owner**	**Due Date**	**Status**
N/A	N/A	N/A	N/A

DECISIONS	
Notes	**Applications**
Inventory address field length will remain 50 characters	Lennar.com

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Contact Preference

FIELD NAMES: MESSAGES	
Field Names	**Questions**
CONTACTPREFERENCE	- Valid values are Contact Preference ("Email", "Phone" ,"Text", "Email or Phone") - This is set to varchar(255) in Tim's process - The length in LennarWeb is varchar(10) - Do we need this any longer

Lennar Meeting Notes

1. VALID VALUES IN SALESFORCE.COM ARE "Email", "Phone" ,"Text"
2. VALID VALUES IN CRM ONDEMAND IS "Email", "Phone" ,"Text", "Email or Phone";
3. KIM WILL NEED TO TALK WITH SALESFORCE.COM TO ALLOW MULTISELECT
4. JEFF TO MODIFY FIELD LENGTH TO VARCHAR (40)
5. SANJEEV TO MODIFY FIELD LENGTH TO VARCHAR (40) IN LENNARWEB

Action Items

Action	Owner	Due Date	Status
Talk with team to see if this should be made multi-select.	Kim A.	06/15/2017	Pending
Discuss with Kay if we need to add this onLennar.com	Kim A.	06/15/2017	Pending

DECISIONS	
Notes	**Applications**
Modify field length to varchar (40)	Lennar.com
Modify field length to varchar (40)	Salessforce.com
Modify field length to varchar (40)	CRM OnDemand
Valid values are "Email", "Phone" & "Text" for initial release	ALL

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Best time to call

FIELD NAMES: BESTTIMETOCALL	
Field Names	**Questions**
BESTTIMETOCALL	What are the valid values for best time to call

Lennar Meeting Notes

1. SALESFORCE.COM: VALID VALUES ARE MORNING, AFTERNOON, EVENING, ANYTIME
2. CRM ONDEMAND: VALID VALUES: Afternoon, Anytime, Early afternoon, Early morning, Evening, Evening / Weekend Only, Evening weekend Only, Late Night, Late afternoon, Mid-Day, Mid-morning, Morning, Saturday, Weekend Only
3. Field length is VARCHAR (30)

Action Items

Action	Owner	Due Date	Status
Discuss with Kay and team if this needs to be added anywhere on Lennar.com	Kim A.	06/15/2017	Pending

DECISIONS	
Notes	**Applications**
Valid values are MORNING, AFTERNOON, EVENING, ANYTIME	ALL
If there is any other value then send it as NULL.	ALL

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Visit Date

FIELD NAMES: VISITDATE	
Field Names	**Questions**
VISITDATE	What are the valid values for best time to call

Lennar Meeting Notes

1. Does the UTlEAD_Queue table have this defined as VARCHAR? Leads sent from Lennar.com will always be in the right format as it is date time.
2. This validation will no longer be required when moving it overrides
3. Valid format for ESB will be MM/dd/yyyy hh:mm:ss

Action Items

Action	Owner	Due Date	Status

DECISIONS	
Notes	**Applications**
Valid format for visit date is MM/dd/yyyy hh:mm:ss	ALL

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Move in Date

FIELD NAMES: MOVEINDATE	
Field Names	**Questions**
MOVEINDATE	- According to the documentation I have it is "Immediate", "1-3 months", "3-6 months", "6 months - 1 year", "More than 1 year" - Lennar.com sends in date time values and some apps send in the values above and others send 09/2017. Seems to be a mix of different standards being used by different applications. - Valid format is MM/dd/yyyy hh:mm:ss. Any other format will be ignored

Lennar Meeting Notes

Action Items			
Action	**Owner**	**Due Date**	**Status**
Ask Asad how the values for Move-in date are being stored in CRM OnDemand?	Jeff M	06/15/2017	Pending
Impacts both BDX and BDX Partners and Microsites. Moving forward all of them should comply to the following standard MM/dd/yyyy hh:mm:ss (date and time stamp)	Sanjeev Puri	06/15/2017	Pending
Check in the past year how many records have Move-in date?	EX2	06/15/2017	Pending

DECISIONS	
Notes	**Applications**
Valid format for move in date is MM/dd/yyyy hh:mm:ss	ALL

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Unsubscribe, Receive Emails, Receive Newsletter, Do not call, Broker, Talk to Loan Office, Do Not Text

FIELD NAMES: Do Not Text	Unsubscribe, Receive Emails, Receive Newsletter, Do not call, Broker, Talk to Loan Office,
Field Names	**Questions**
Unsubscribe, Receive Emails, Receive Newsletter, Do not call, Broker, Talk to Loan Office, Do Not Text	- If null set to 0 - In Lennar Web - UNSUBSCRIBE it is a bit flag - RECEIVEEMAILS it is a bit flag - RECEIVENEWSLETTER it is a bit flag - DONOTCALL it is a bit flag - BROKER it is a bit flag - TALKTOLOANOFFICER it is a bit flag

Lennar Meeting Notes

1. DO NOT TEXT FIELD TO BE ADDED TO THE COMMUNITYLEAD TABLE
2. SET THE VALUE TO 0
3. KIM DO WE NEED TO ADD ANY MORE FIELDS?
4. LENNAR.COM / MYLENNAR - COMMUNICATION PREFERENCES

Action Items

Action	Owner	Due Date	Status
Discuss with Legal the changes required on Lennar.com to opt out/in for Do Not Text Field.	Courtney Lee	06/15/2017	Pending
Do Not Text Field to be added to Salesforce.com	Jeff M.	06/15/2017	Pending
Do Not Text Field to be added to CRM OnDemand	Jeff M.	06/15/2017	Pending

DECISIONS

Notes	Applications
Add Do Not Text Field to Community Lead Table	Lennar.com
Integrate Do Not Text Field (communication preferences)	ALL
Set 0 if value is null for all of these fields.	ALL

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Lead source code

FIELD NAMES:	LEADSOURCECODE
Field Names	**Questions**
LEADSOURCECODE	- We need a copy of UTLEAD_CFG_LEADSOURCE - Values present in Lennar.com NULL, '', AVE, DAL, FB, HOH, HOUVB, HVB, IPD, LEN, LLC, LLM, MOBILE, SMF, SMT, SMW, SMY, TRU, ZIL - Values present in Lennar.com IPD, LEN, MOBILE (LENNAR.COM), LLC - Looking at the data move.com, newhomesource does not set the Leadsourcecode field - Please explain the logic behind the configuration table. - MATCH PARENTLEADSOURCECODE (UCL / UTLEAD_QUEUE) - MATCH PARENTLEADSOURCECODE UCL WITH LEADSOURCE UTLEAD_QUEUE - IF THERE IS A MATCH SET LEADSOURCECODE (UCL) TO LEADSOURCECODE (UTLEAD_QUEUE) - What does error 2 mean? - IF LEADSOURCECODE = 'TBD' THEN LOG INTO VALIDATION TABLE - UPDATE LENNARSOURCECODE = 'LEN' - How does all of this tie back to salesforce.com and CRM OnDemand?

Lennar Meeting Notes

1. Keep all logic as is.
2. Valid Leadsource values in Lennar.com are IPD, LEN, MOBILE (LENNAR.COM), LLC, TRU, ZIL, HOH, ZHL, ZHM, PTL,PTM, ESPL, ESPM
3. Don't send this field to ESB or if you do ESB should ignore it.

Action Items

Action	Owner	Due Date	Status
Send us the data and table schema for UTLEAD_CFG_LEADSOURCE	Tim McLaughlin	06/12/2017	Pending

DECISIONS	
Notes	**Applications**
The purpose of this field was to validate Lead Source by Tim's process. This is no longer needed therefore there will be no validation performed.	ALL
This information will not be sent to CRM OnDemand on Salesforce.com.	CRM
This information will be saved on LennarWeb.	Lennar.com

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Division number A.K.A Market code

FIELD NAMES:	LEADSOURCECODE
Field Names	**Questions**
DIVISIONNUMBER A.K.A MARKETCODE	- Need a copy of the UTLEAD_LKP_DIVISIONCODE - Does look on UTLEAD_LKP_DIVISIONCODE then substring DIVISIONNUMBER, 1,3 compare OLD DIVISION CODE - If not in the lookup or NULL, set to LNR - Explain why is this needed - Courtney what is old division code?

Lennar Meeting Notes

1. COURTNEY RESPONSIBLE FOR MAPPING IN LENNAR.COM
2. COMMUNICATE TO CRM ONDEMAND AND SALESFORCE.COM
3. TABLE REQUIRED FOR MAPPING FROM MARKETCODE TO DIVISIONCODE ONLY FOR 'TBD' DATA....ELSE ALL DATA WITH NO 'TBD' WILL BE SENT
4. CHANGE EXISTING LOGIC FROM LOOKINGUP THE DIVISIONCODE.....
5. FLAG ON DIVISION MASTER TABLE WHICH DIVISIONS FOR 'TBD' DO WE SENT THE LEADS TO
6. EDGE CASE HAS SOME WHERE FOR THE SAME MARKETCODE YOU CAN HAVE TWO RESULTS....WITH DIFFERENT DIVISION IDS...
7. WHEN THERE ARE NO EDGE CASES WE WILL TAKE THE MARKETCODE RETRIEVE THE DIVISION NUMBER (TAKE THE FIRST 3 CHARACTERS) AND SEND THAT....
8. If not in the lookup or NULL, set to LNR

Action Items

Action	Owner	Due Date	Status
Courtney to create a formal process to notify CRM OnDemand and Salesforce.com team when a new division is added.	Courtney Lee	06/15/2017	Pending

DECISIONS	
Notes	**Applications**
When a lead is submitted and the division number contains TBD, then lookup the division table to get the division number. Under certain conditions you can get multiple rows and for those conditions we will need to add a flag to the division code table to know which value the lead process should select. Division number when contains TBD, is Market code + TBD. IN order for us to retrieve the correct division number we will need to execute the following query: From the Division Number get the first 3 characters and then match it to the Market table with Market code and retrieve the market id.	Lennar.com

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Then the join below, will return you the division number based on the market id. SELECT dbo.Division.DivisionNumber, dbo.Division.DivisionName, dbo.Market.MarketCode, dbo.Market.MarketName, dbo.DivisionMarket.* FROM dbo.Division INNER JOIN dbo.DivisionMarket ON dbo.Division.DivisionID = dbo.DivisionMarket.DivisionID INNER JOIN dbo.Market ON dbo.DivisionMarket.MarketID = dbo.Market.MarketID order by DivisionNumber If this query returns multiple rows (2 or more divisions in one market), then select the one which has been marked as primary: - SFR – is going to return 3 division codes BAH, BAU, LSC (Sacramento and Bay area merged). - FTL – is going to return 2 division codes DAH and PBH. - TRE – is going to return 2 division codes DAH and PBH - ORL – is going to return 2 division codes OLH and TPU	
If division code does not exist or NULL then set the value to LNR.	Lennar.com
New division addition, notification and coordination	ALL

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Parent City

FIELD NAMES:	PARENTCITY
Field Names	**Questions**
PARENTCITY	- Need a copy of the UTLEAD_LKP_MARKETCITYCODE - Set the division number to JDE Division code - Parent city as MarketCityCode

Lennar Meeting Notes

1. IF THERE IS A PARENTCITY MATCH WITH MARKET TABLE (MARKETCODE) IF VALID SEND IT....3 DIGIT CODE....ELSE SEND NULL
2. CREATE A NEW FORM FOR COURTNEY TO ADD MARKETS; LAT LONG
3. PARENTCITY IS MARKETCODE

Action Items

Action	Owner	Due Date	Status

DECISIONS	
Notes	**Applications**
Parent City is Market Code. Market code exists in the market table. Check to see if the parent city exists in the market table by matching it with market code. If exists then send the first 3 characters else send NULL value.	Lennar.com
In addition to this request, we will create a form for Courtney to add and modify market data.	Lennar.com

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Parent lead source

FIELD NAMES:	PARENTLEADSOURCE
Field Names	**Questions**
PARENTLEADSOURCE	- There are about 99 values in LennarWeb - Need a copy of the UTLEAD_CFG_LEADSOURCE - UPDATE PARENTLEADSOURCE BASED ON LEADSOURCECODE WHEN PARENTLEADSOURCE IS EMPTY OR DOES NOT MATCH PARENTLEADSOURCE - Need to know what is going on here

Lennar Meeting Notes

1. This information is controlled by Kim and Lennar IT. Tim to send us PARENTLEADSOURCE data & Develop UX to manage Parent Lead Source Data.
2. This data is never used so we can set both Leadsource and Parentleadsource to the same value from Leadsource if the Leadsource exists in the Config table.

Action Items

Action	Owner	Due Date	Status
Send us schema and source data for UTLEAD_CFG_LEADSOURCE	Tim McLaughlin	06/15/2017	Pending
Document a process on how to manage parent lead source data and keep it in synch between all systems.	Courtney Leee	06/15/2017	Pending

DECISIONS

Notes	Applications
Bring over UTLEAD_CFG_LEADSOURCE into LennarWeb	Lennar.com
Develop interface for Lennar to manage UTLEAD_CFG_LEADSOURCE	Lennar.com

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Lead source

FIELD NAMES:	LEADSOURCE
Field Names	**Questions**
LEADSOURCE	- There are about xxx values in LennarWeb - UPDATE EMPTY LEADSOURCES AS THE PARENTLEADSOURCE FROM UTLEAD_CFG_LEADSOURCE - IF IT DOES NOT HAVE .COM IN THE END THEN WE WILL REPLACE IT WITH PARENTLEADSOUCE - Need to know what is going on here

Lennar Meeting Notes

1. CONTROLLED BY KIM BY LENNAR IT -- COURTNEY NEED TO BRING OVER THE CONFIG TABLE - UX.....
2. FAILS LEAD IF IT DOES NOT EXIST
3. SALESFORCE.COM PULL DATA IF IT DOES NOT EXIST OTHERWISE SEND TO LENNARGROUPLANDINGPAGES.....

Action Items

Action	Owner	Due Date	Status
Need the name of the table and data for lead source in salesforce.com	Jeff M.	06/15/2017	Pending

DECISIONS	
Notes	**Applications**
If the leadsource does not exist in the UTLEAD_CFG_LEADSOURCE table then query salesforce.com to see if the leadsource exists. If it does exist add it to the config table.	Lennar.com
If it does not exist in UTLEAD_CFG_LEADSOURCE table and salesforce.com, then the lead should be not be sent to the ESB. If lead is not sent then notify lc.is.lead.integration@lennar.com (verify)	Lennar.com
Once the leadsource has been added, the record that has status **Lead Source does not exist**, will be processed. This should be a separate automated task that should run and not a manual step.	Lennar.com
If the parentleadsource and leadsource don't match for any reason, then the parentleadsource will be set to the leadsource.	Lennar.com
If the parentleadsource is null, then the parentleadsource will be set to the leadsource.	Lennar.com

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Source

FIELD NAMES:	SOURCE
Field Names	**Questions**
SOURCE	

Lennar Meeting Notes

1. KIM send source type
2. CRM ONDEMAND: value is set to INTERNET; Hardcoded by the CRM OnDemand process
3. SALESFORCE.COM: value is set to DIGITAL MEDIA; Hardcoded by the salesforce.com process

Action Items

Action	Owner	Due Date	Status

DECISIONS	
Notes	**Applications**
Set source to INTERNET	Lennar.com

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Landing pages

FIELD NAMES:	LANDING PAGES
Field Names	**Questions**
LANDING PAGES	- Clearly need to know what this is all about. - Kim can explain from business perspective all the steps.

Lennar Meeting Notes

1. Admin interface:
    a. Activating and Deactivating for landing pages name was done to ensure that no junk leads were being sent in. This will be done for only landing pages that are not part of Sitecore. Allow admins to add an agency name, agency phone number.
    b. If we see over 100 leads in an hour coming in from Sitecore landing pages, the system will send a notification to lc.is.lead.integration@lennar.com
    c. PHP and .NET Documentation
2. All Sitecore landing pages leads will be sent.
3. Source data in landing pages has been phased out.
4. Deactivating landing page name...if leads are coming in mention that this has been deactivated and need to review why leads are coming in.
5. The following are the status codes used by the current lead integration process.
    a. 1 - new lead
    b. 2 - failed validation
    c. 3 - passed validation
    d. 4 - export
    e. 6 - duplicate
    f. 99 - run successfully
    g. - archive 99s after a week.

LEAD WEBSERVICE Change Request

Validate that this data is required. If it fails then notify Courtney Lee and group.

DIVISIONNUMBER	VARCHAR	6	Division Code + site code,
○ e.g. "LSCLEN" (3 character division code +'LEN') (see attached second tab for DIV Code)			
LASTNAME	VARCHAR	30	Customer Last Name
FIRSTNAME	VARCHAR	20	Customer First Name
ZIPCODE	VARCHAR	10	Customer Address Postal Code
EMAIL	VARCHAR	50	Customer Email Address
VISITDATE	DATETIME 8	Date	Customer visited the website
LEADTYPE	VARCHAR	30	"Landing Page" - defaults to Landing Page
PREFERREDLANGUAGE	VARCHAR	3	Preferred Language ("ENU" for English, "ESP" for Spanish)
PARENTLEADSOURCE	VARCHAR	50	"Lennar.com" - defaults to Lennar.com
LEADSOURCE	VARCHAR	50	"Lennar.com"
LANDINGPAGE	VARCHAR	50	{Landing Page Name} - ONLY IF LEADTYPE IS LANDINGPAGE THEN THIS IS REQUIRED.

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NOT REQUIRED FIELDS BUT PREFERRED

COMMUNITYNAME	VARCHAR	50	Community Name (from divisions - picklist)
COMMUNITYNUMBER	VARCHAR	8	Community Number (from divisions)
PARENTCITY	VARCHAR	50	Also called Market City Code (see second tab for MC code)

Action Items

Action	Owner	Due Date	Status
Admin interface where EXTERNAL landing pages are managed - Send the PHP and .NET Documentation	Tim	06/15/2017	Pending
Is there any logic today to let us know if we are getting hit by a bot?	Tim	06/15/2017	Pending
What is the algorithm to figure out junk emails are being sent? I believe a year ago, we were asked whether Lennar.com was the source and you mentioned something about a process that identify that.	Tim	06/15/2017	Pending

DECISIONS

Notes	Applications
Develop admin interface to manage landing page names.	Lennar.com
Import existing landing page names.	Lennar.com
Deactivated landing page: if leads are coming in mention that this has been deactivated and need to review why leads are coming in. If lead is not sent then notify lc.is.lead.integration@lennar.com (verify).	Lennar.com
Provide an interface to either set status to 'Not to Send' or correct data issues. once corrected, reprocess leads that have been queued up.	Lennar.com
Allow admins to activate or deactivate landing pages name. This interface will be developed to only add landing page names that are not part of Sitecore. Allow divisions to add additional meta data for landing pages such as agency name and agency phone number.	Lennar.com
Responsibility for managing external landing pages will be done by Karyn.	Lennar.com
Implement Lead Web Services changes.	Lennar.com
FYI – Lennar.com does not host any non Sitecore Landing Pages.	Lennar.com

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COMMUNITY LEAD TABLE SCHEMA

COLUMN	TYPE	SIZE	COMMENTS	REQUIRED
COMMUNITYLEADID	INT	4	Default value provided by Lennar.com	Y
DIVISIONID	INT	4	Division ID value	
COMMUNITYID	INT	4	Community ID value	
PLANID	INT	4	Plan ID value	
DIVISIONNUMBER	VARCHAR	6	Division Code + site code, e.g. "LSCLEN" (3 character division code +'LEN') (see attached second tab for DIV Code)	Y
COMMUNITYNUMBER	VARCHAR	8	Community Number (from divisions)	
COMMUNITYNAME	VARCHAR	50	Community Name (from divisions)	Y
PLANNUMBER	VARCHAR	4	Plan Number	
PLANMKTGNAME	VARCHAR	50	Plan Name	
LASTNAME	VARCHAR	30	Customer Last Name	Y
FIRSTNAME	VARCHAR	20	Customer First Name	Y
MI	VARCHAR	1	Customer Middle Initial	
ADDRESS1	VARCHAR	40	Customer Street Address 1	
ADDRESS2	VARCHAR	40	Customer Street Address 2	
CITY	VARCHAR	25	Customer Address City	
STATE	VARCHAR	50	Customer Address State (should be 2-character State Code)	
PROVINCE	VARCHAR	50	Customer Address Province (for international Customers)	
ZIPCODE	VARCHAR	10	Customer Address Postal Code	Y
COUNTRY	VARCHAR	50	Customer Address Country (default to "United States")	
HOMEPHONE	VARCHAR	14	Customer Home Phone Number	
WORKPHONE	VARCHAR	14	Customer Work Phone Number	
WORKPHONEEXT	VARCHAR	4	Customer Work Phone Number Extension	
FAX	VARCHAR	14	Customer Fax Phone Number	
EMAIL	VARCHAR	50	Customer Email Address	Y
CONTACTPREFERENCE	VARCHAR	10	Contact Preference ("Email", "Phone", "Email or Phone")	
VISITDATE	DATETIME	8	Date Customer visited the website	Y
MESSAGE	VARCHAR	4000	Customer Comments	
REASONFORMOVE	VARCHAR	500	Reason for Move ("Better Commute", "Better Schools", "Currently Renting", "Growing Family", "Investment Property", "Lifestyle Change", "Nicer Design/Amenities", "Relocation", "Safer Neighborhood", "Second/Vacation Home", "Undetermined")	
MOVEINDATE	VARCHAR	50	Move In Date ("Immediate", "1-3 months", "3-6 months", "6 months - 1 year", "More than 1 year")	

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PRICEDFROM	VARCHAR	50	Price Range Low Value	
PRICEDTO	VARCHAR	50	Price Range High Value	
PARENTCITY	VARCHAR	50	Also called Market City Code (see second tab for MC code)	Y
STATEREGION	VARCHAR	50	Not Used	
COMMUNITYCITY	VARCHAR	50	City that the Community is in	Y
COMMUNITYSTATE	VARCHAR	50	State Code that the Community is in	Y
COMMUNITYZIP	VARCHAR	53	Postal Code that the Community is in	Y
MASTERCOMMUNITY	VARCHAR	50	Master Community Name	
COMMUNITYMAJORTYPE	VARCHAR	50	Community Major Type Code	
COMMUNITYMINORTYPE	VARCHAR	50	Community Minor Type Code	
INVENTORY	BIT	1	Inventory Home Flag (indicates customer interested in an inventory home)	
INVENTORYADDRESS	VARCHAR	50	Inventory Home Address (should only have a value if the INVENTORY flag is set to 1)	
INVENTORYPRICE	MONEY	8	Inventory Home Price	
HOMESITEID	VARCHAR	15	Home Site ID	
FINANCING	VARCHAR	50	Name of Finance Company	
UNSUBSCRIBE	BIT	1	Unsubscribe Flag	
RECEIVEEMAILS	BIT	1	Receive Emails Flag	
RECEIVENEWSLETTER	BIT	1	Receive Newsletter Flag	
DONOTCALL	BIT	1	Do Not Call Flag	
BROKER	BIT	1	Customer has Broker Flag	
TALKTOLOANOFFICER	BIT	1	Customer has talked to a Loan Officer Flag	
HEARABOUTUS	VARCHAR	500	How did customer hear about Lennar	
LEADTYPE	VARCHAR	30	“APLUS”	Y
PREFERREDLANGUAGE	VARCHAR	3	Preferred Language ("ENU" for English, "ESP" for Spanish)	Y
PARENTLEADSOURCE	VARCHAR	50	"Lennar.com"	Y
LEADSOURCE	VARCHAR	50	"Lennar.com"	Y
SOURCEDETAIL	VARCHAR	30	Source Detail (from Kim)	
LANDINGPAGE	VARCHAR	50	Landing page name (from Kim)	
SIEBEL_INTEGRATION	INT	4	Siebel Use Only	
USERTYPE	VARCHAR	30	Not Used	
UPDATETYPEINTEREST	VARCHAR	500	Not Used	
COMMUNITYTYPEINTEREST	VARCHAR	500	Not Used	
RECEIVEBROCHURE	BIT	1	Receive Brochure Flag	
RECEIVEMAIL	BIT	1	Receive Mail Flag	
CONTACTBYINHC	BIT	1	Contact By INHC Flag	
MAKEAPPOINTMENT	BIT	1	Make Appointment Flag	
BESTTIMETOCALL	VARCHAR	30	Best Time to Call Customer	
LEADSOURCECODE	VARCHAR	10	"LEN"	Y
DATESENTTOSIEBEL			Siebel Use Only	

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SENTTOSIEBEL			Siebel Use Only	
LEAD_INTEGRATION_FLAG			Siebel Use Only	
LEAD_EXPORTSQL_FLAG			Siebel Use Only	
LEAD_INTEGRATION_DATE			Siebel Use Only	
LEAD_VALIDATION_ITERATIONS			Siebel Use Only	
LEAD_SQLEXPORT_ITERATIONS			Siebel Use Only	
LEAD_DESTINATION			Siebel Use Only	
LEAD_INHCEMAILADDRESS			Siebel Use Only	
LEAD_INCOMING_TIMESTAMP			Siebel Use Only	
Broker_Engaged_Ind			Datatype Boolean if available; domain '0' or '1'. If not available, then number(1) but limit domain to '0' or '1' via the application	
Broker_Agent_First_Name			Varchar (50); domain includes 'Null'	
Broker_Agent_Last_Name			Varchar (50); domain includes 'Null'	
Broker_Company_Name			Varchar (255); domain includes 'Null'	
Broker_Agent_Email			Varchar (255); domain includes 'Null'	

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