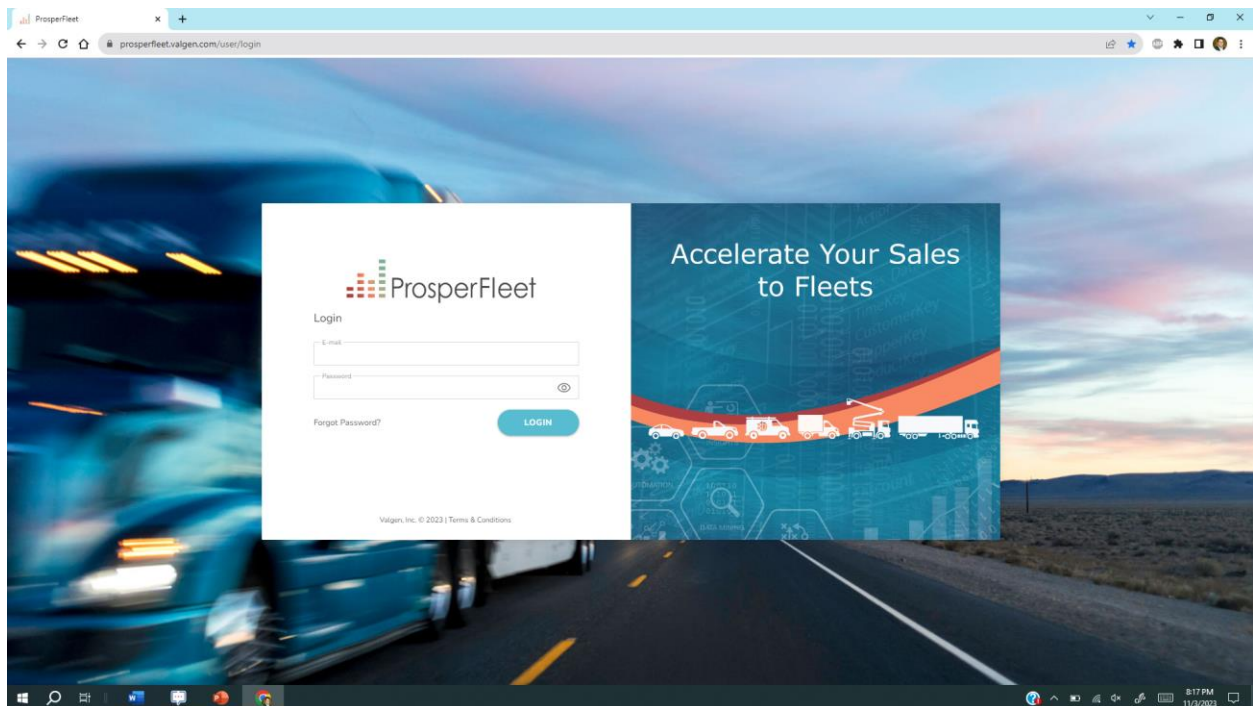


ProsperFleet Salesforce Integration Install Guide



December 20, 2024

version 3.1

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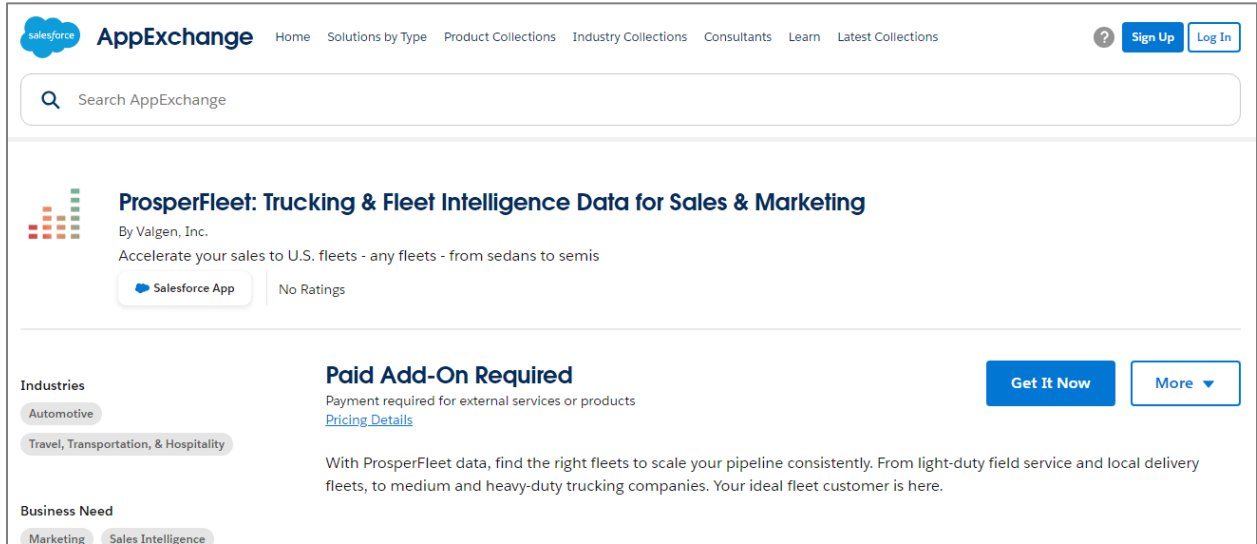
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ProsperFleet on the AppExchange

1. Go directly to ProsperFleet on AppExchange

<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3u00000QtjSqEAJ>

Alternately, search “ProsperFleet” on Appexchange: <https://appexchange.salesforce.com/>



The screenshot shows the AppExchange listing for ProsperFleet. The header includes the Salesforce AppExchange logo and navigation links: Home, Solutions by Type, Product Collections, Industry Collections, Consultants, Learn, and Latest Collections. There are 'Sign Up' and 'Log In' buttons in the top right. A search bar is located below the header.

The main content area features the ProsperFleet logo and title: **ProsperFleet: Trucking & Fleet Intelligence Data for Sales & Marketing**. Below this, it says 'By Valgen, Inc.' and 'Accelerate your sales to U.S. fleets - any fleets - from sedans to semis'. There is a 'Salesforce App' badge and 'No Ratings'.

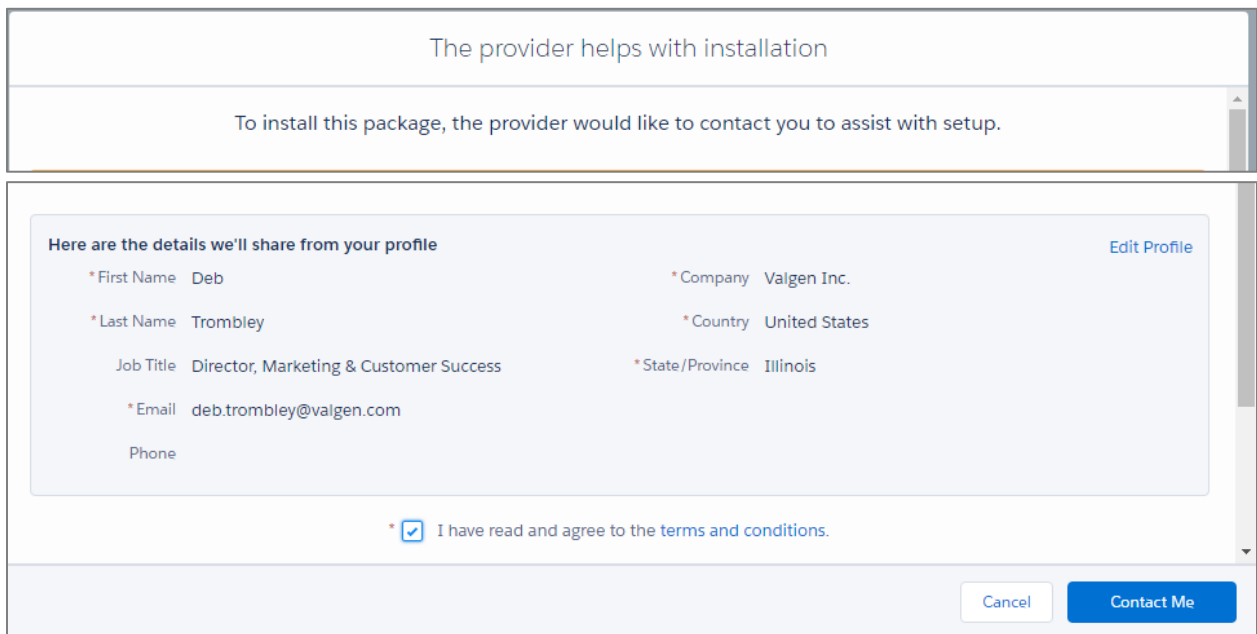
On the left, there are filters for 'Industries' (Automotive, Travel, Transportation, & Hospitality) and 'Business Need' (Marketing, Sales Intelligence).

The main body contains a 'Paid Add-On Required' section with a note: 'Payment required for external services or products' and a link to 'Pricing Details'. Below this, a paragraph states: 'With ProsperFleet data, find the right fleets to scale your pipeline consistently. From light-duty field service and local delivery fleets, to medium and heavy-duty trucking companies. Your ideal fleet customer is here.'

At the bottom right, there are two buttons: 'Get It Now' and 'More'.

Click on “Get It Now”, and login with credentials for the Salesforce Org you wish to install the integration in. Once logged in, you will this screen. Click on “Contact Me”.

Although this step is not mandatory, this will alert us and register your leads in our Salesforce licensing system.



The screenshot shows the installation screen for ProsperFleet. At the top, it says 'The provider helps with installation'. Below this, a message states: 'To install this package, the provider would like to contact you to assist with setup.'

The main section is titled 'Here are the details we'll share from your profile' and includes an 'Edit Profile' link. It displays the following information:

- *First Name: Deb
- *Last Name: Trombley
- Job Title: Director, Marketing & Customer Success
- *Email: deb.trombley@valgen.com
- Phone:
- *Company: Valgen Inc.
- *Country: United States
- *State/Province: Illinois

At the bottom, there is a checkbox labeled 'I have read and agree to the terms and conditions.' which is checked. There are 'Cancel' and 'Contact Me' buttons at the bottom right.

2. Install link for the ProsperFleet integration package

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t3b000000uCQ9AAM>

By clicking on this link, you will be able to Install ProsperFleet in your Salesforce Org.


Install ProsperFleet
 By Valgen, Inc.


☐ Install for Admins Only


☒ Install for All Users


☐ Install for Specific Profiles...

App Name	Publisher	Version Name	Version Number
ProsperFleet	Valgen, Inc.	version 1.1	1.1

[Additional Details](#)
[View Components](#)


Install ProsperFleet
 By Valgen, Inc.


Installation Complete!

App Name	Publisher	Version Name	Version Number
ProsperFleet	Valgen, Inc.	version 1.1	1.1

Once the package is installed you can see it in Quick Find > Installed Packages.

Installed Packages
[Help for this Page](#)

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

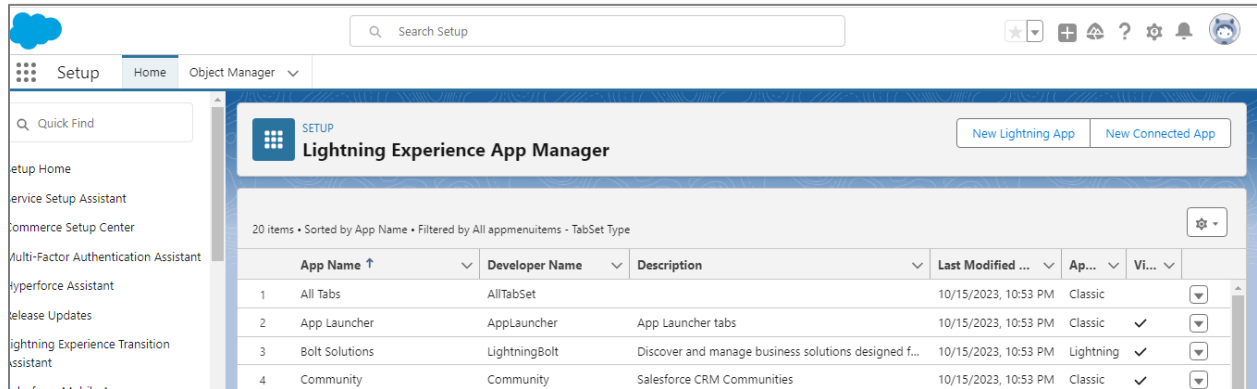
To remove a package, click Uninstall. To manage your package licenses, click Manage Licenses.


[Visit AppExchange »](#)

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Enabled for Platform Integrations	Expiration Date	Install D:
Uninstall	 ProsperFleet	Valgen, Inc.	1.1	prosperfleet	Free	N/A	N/A	N/A	N/A	11/2/202 6:53 AM

Create a Connected App

3. In quick find, type “App Manager” and click “New Connected App”

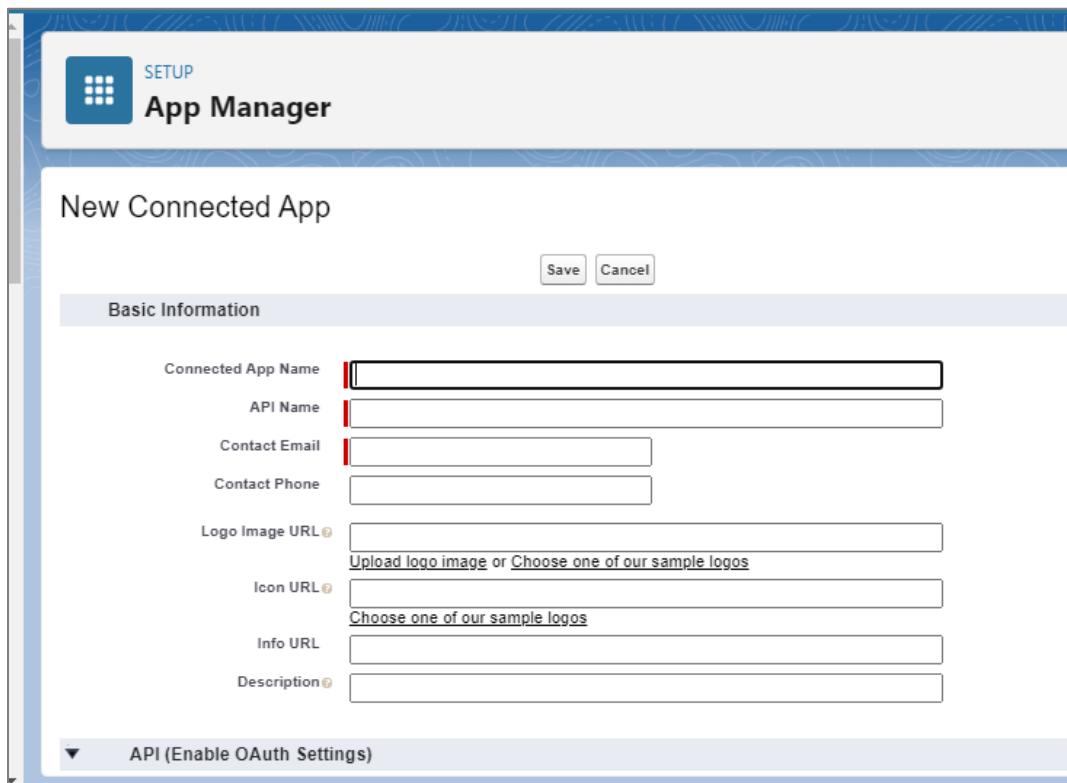


Once you Click on “New Connected App”, fill in the details:

Connected App Name: ProsperFleet Integration

API Name: ProsperFleet_Integration

Contact Email: your email

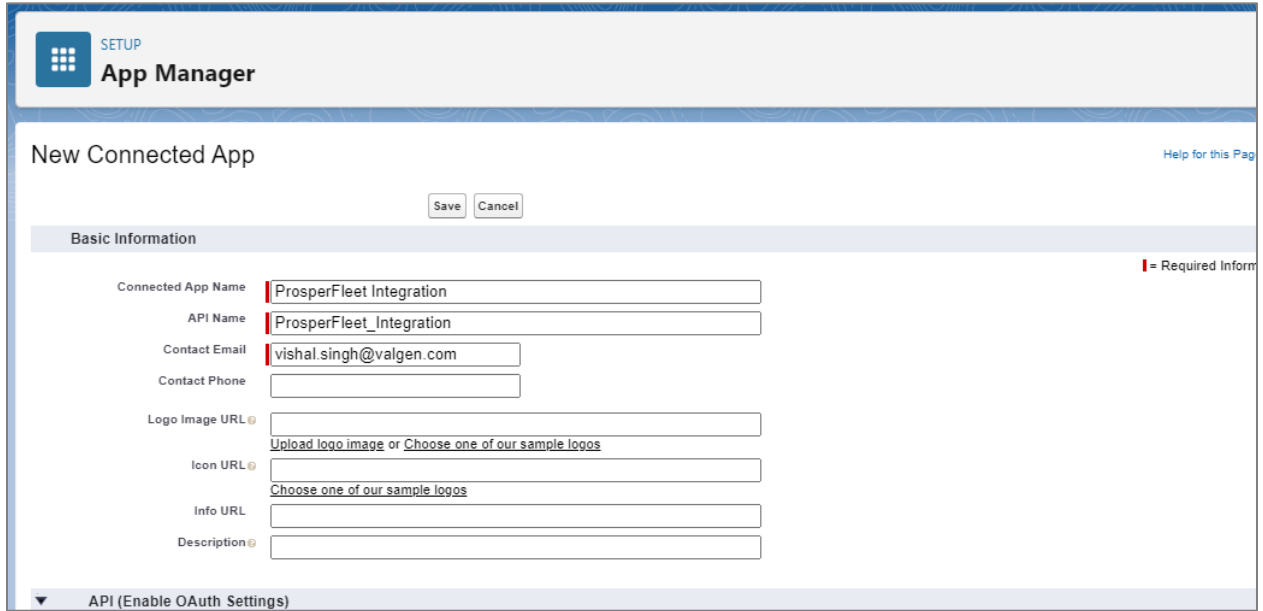


The screenshot shows the 'New Connected App' form in the Salesforce Setup interface. The form is titled 'New Connected App' and has a 'Save' button and a 'Cancel' button. It contains several input fields for basic information:

- Connected App Name
- API Name
- Contact Email
- Contact Phone
- Logo Image URL (with a link to 'Upload logo image or Choose one of our sample logos')
- Icon URL (with a link to 'Choose one of our sample logos')
- Info URL
- Description

At the bottom of the form, there is a section titled 'API (Enable OAuth Settings)' which is currently collapsed.

After this info is filled out, it should look like this:



SETUP
App Manager

New Connected App [Help for this Page](#)

Basic Information

Connected App Name ! = Required Information

API Name

Contact Email

Contact Phone

Logo Image URL

Icon URL

Info URL

Description

API (Enable OAuth Settings)

Configure the Settings

4. Check Enable OAuth Settings

Enter the callback URL of ProsperFleet Application. A callback URL is the address accessed after OAuth authorization for the user, also referred to as consumer (of connected app). It should be formatted as follows for the Connected App:

<https://prosperfleet-alpha.valgen.com/app/settings/ManageIntegrations/ManageIntegrationsScreen>

5. Add Available OAuth Scopes

- a. Manage user data via APIs (api)
- b. Perform requests at any time (refresh_token, offline_access)

Leave other settings unchanged.

API (Enable OAuth Settings)

Enable OAuth Settings ☒

Enable for Device Flow ☐

Callback URL ⓘ

https://prosperfleet-alpha.valgen.com/app/settings/ManageIntegrations/ManageIntegrationsScreen

Use digital signatures ☐

Selected OAuth Scopes

Available OAuth Scopes

Access unique user identifiers (openid)

Full access (full)

Manage Data Cloud Calculated Insight data (cdp_calculated_insight_api)

Manage Data Cloud Identity Resolution (cdp_identityresolution_api)

Manage Data Cloud Ingestion API data (cdp_ingest_api)

Manage Data Cloud profile data (cdp_profile_api)

Manage Pardot services (pardot_api)

Manage user data via Web browsers (web)

Perform ANSI SQL queries on Data Cloud data (cdp_query_api)

Perform segmentation on Data Cloud data (cdp_segment_api)

Add

Remove

Selected OAuth Scopes

Manage user data via APIs (api)

Perform requests at any time (refresh_token, offline_access)

Require Proof Key for Code Exchange (PKCE) Extension for Supported Authorization Flows ⓘ ☒

Click Continue.

6. Get Consumer Key and Secret Key

Under API - Enable OAuth Settings):

Click on 'Manage Consumer Details.'

SETUP

Manage Connected Apps

Info URL

API (Enable OAuth Settings)

Consumer Key and Secret

Manage Consumer Details

Selected OAuth Scopes

Manage user data via APIs (api)

Perform requests at any time (refresh_token, offline_access)

Callback URL

https://prosperfleet-alpha.valgen.com/app/settings/ManageIntegrations/ManageIntegrationsScreen

Enable for Device Flow

☐

Require Proof Key for Code Exchange (PKCE) Extension for Supported Authorization Flows ⓘ

☒

Require Secret for Web Server Flow

☒

Require Secret for Refresh Token Flow ⓘ

☒

Enable Client Credentials Flow ⓘ

☐

Enable Authorization Code and Credentials Flow ⓘ

☐

Issue JSON Web Token (JWT)-based access tokens for named users ⓘ

☐

Introspect All Tokens

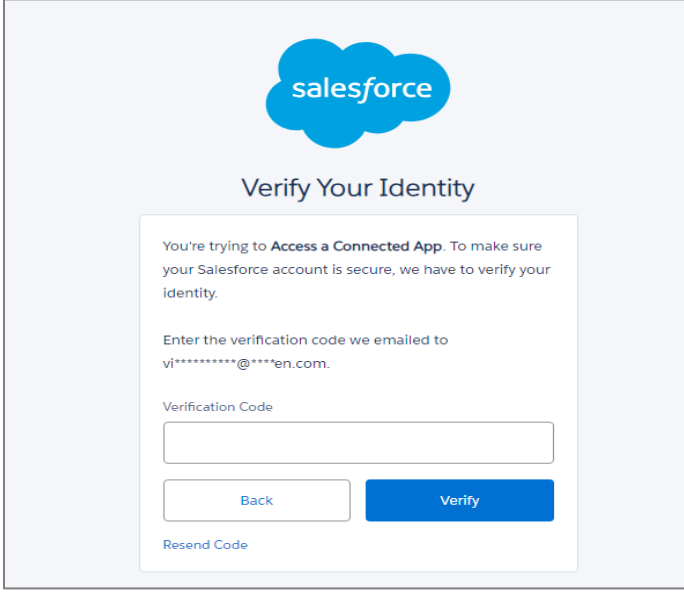
☐

Token Valid for

0 Hour(s)

Page 7 of 14

Once clicked on “Manage Consumer Details”, you will be asked for a verification.



Enter the verification code sent to your email.

Copy Consumer Key and Consumer Secret for API calls. Keep them confidential.

Note: do not use the key/string in this guide; get your own. This is important for the app to work.

Connected App Name
ProsperFleet Integration

[« Back to Manage Connected Apps](#)

Consumer Details

Consumer Key	3MVG9VTfpJmxg1ygOhaN8OE3QxdNe9EBwkTEMGHQNeLgitkuNsmLi8TsoqEmnVIJCETXqto1OAehV7ahcF9J7
	Copy
Consumer Secret	C970D0812DB5CFBC3AAE1569B220ED0774C50CCE79C5D3F6B84E34074CCA21FD
	Copy

Staged Consumer Details

Generate staged values for the consumer key and secret. When you apply the staged values, they replace the original consumer details.

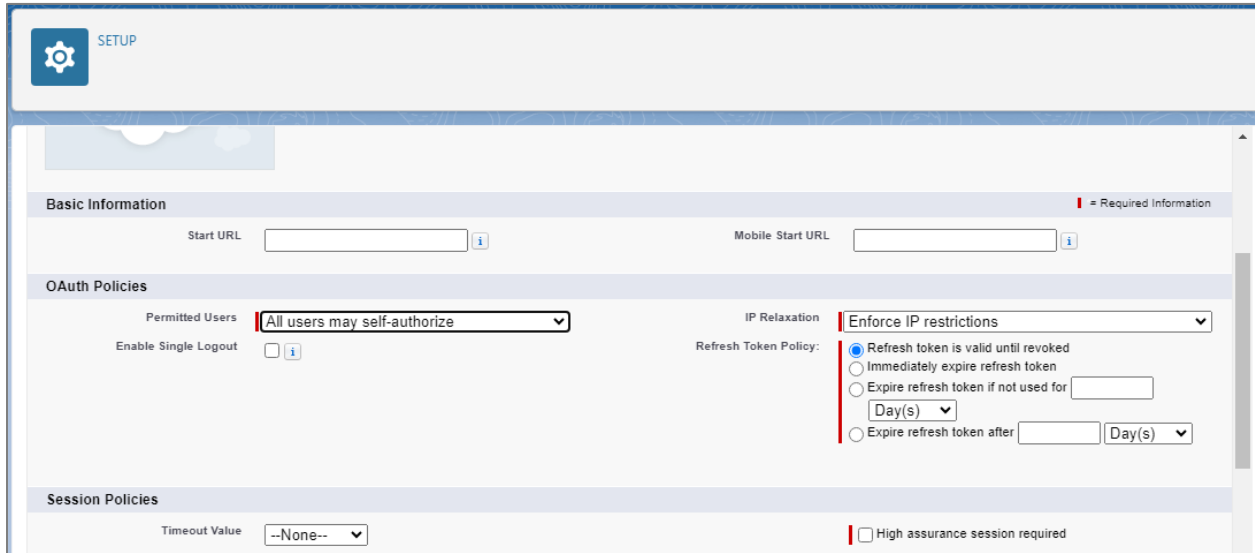
Staged Consumer Key	Not generated
Staged Consumer Secret	Not generated

[Generate](#) [Apply](#) [Cancel](#)

7. Grant access to all users: edit policies

Click on 'Manage' (top) -> Click on 'Edit Policies.'

Change 'Permitted Users' dropdown to "All uses may self-authorize", Click Save.



Basic Information ⓘ Required Information

Start URL ⓘ Mobile Start URL ⓘ

OAuth Policies

Permitted Users: All users may self-authorize ⓘ

Enable Single Logout: ☐ ⓘ

IP Relaxation: Enforce IP restrictions ⓘ

Refresh Token Policy:

- ☒ Refresh token is valid until revoked
- ☐ Immediately expire refresh token
- ☐ Expire refresh token if not used for Day(s)
- ☐ Expire refresh token after Day(s)

Session Policies

Timeout Value: --None-- ⓘ

☐ High assurance session required

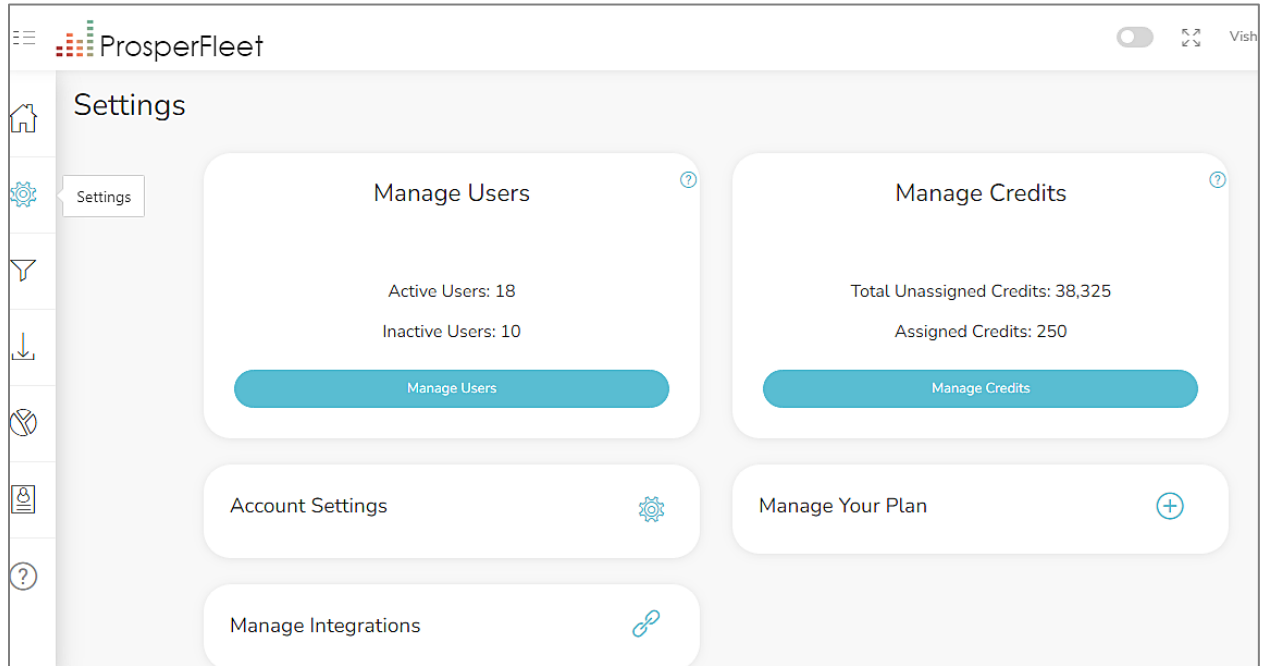
Now you have the information needed for generating an access token:

- Base URL: [https://\[orgurl\].my.salesforce.com](https://[orgurl].my.salesforce.com)
- Callback URL: URL invoked after OAuth authorization for the consumer (connected app)
- Auth URL: <https://login.salesforce.com/services/oauth2/authorize>
- Access Token URL: [https://\[orgurl\].my.salesforce.com/services/oauth2/token](https://[orgurl].my.salesforce.com/services/oauth2/token)
- Client ID: <Consumer Key> - (Copied from previous steps)
- Client Secret: <Consumer Secret> - (Copied from previous steps)

ProsperFleet App Configuration

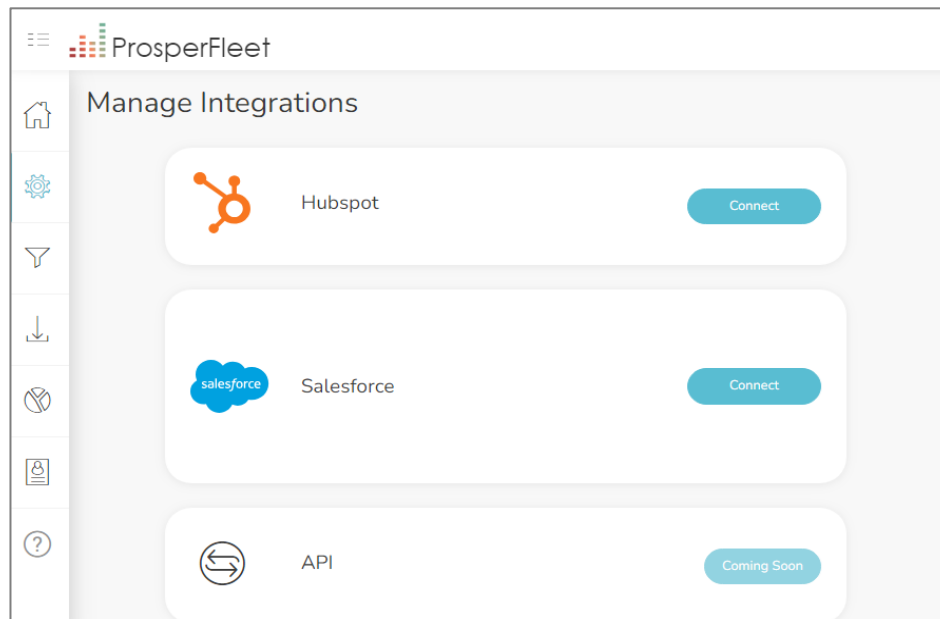
8. Login to ProsperFleet App and access credentials

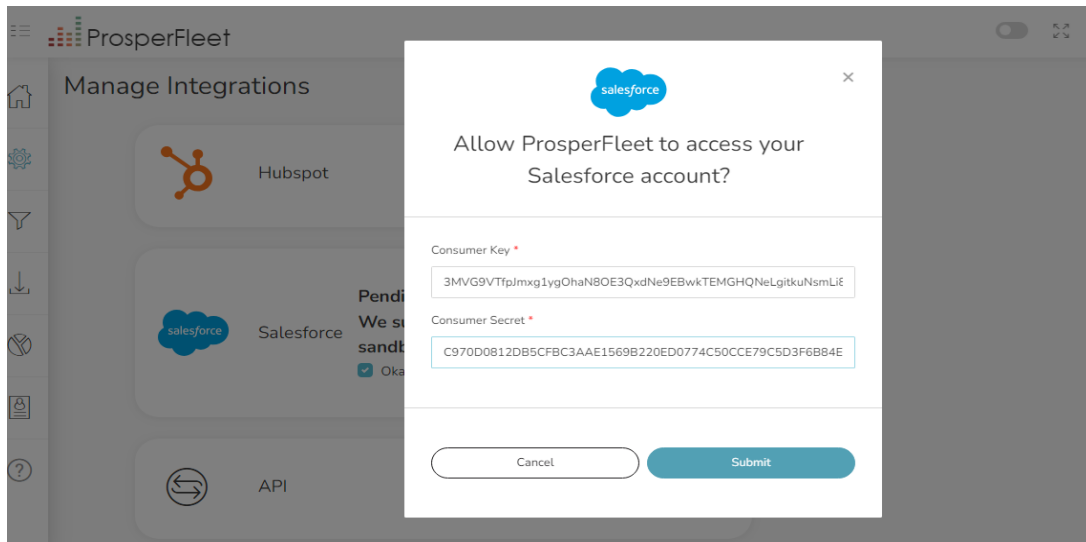
Navigate to Settings -> Manage Integrations Section.



Connect to Salesforce.

Click on Manage Integration Icon and “connect” button next to Salesforce.

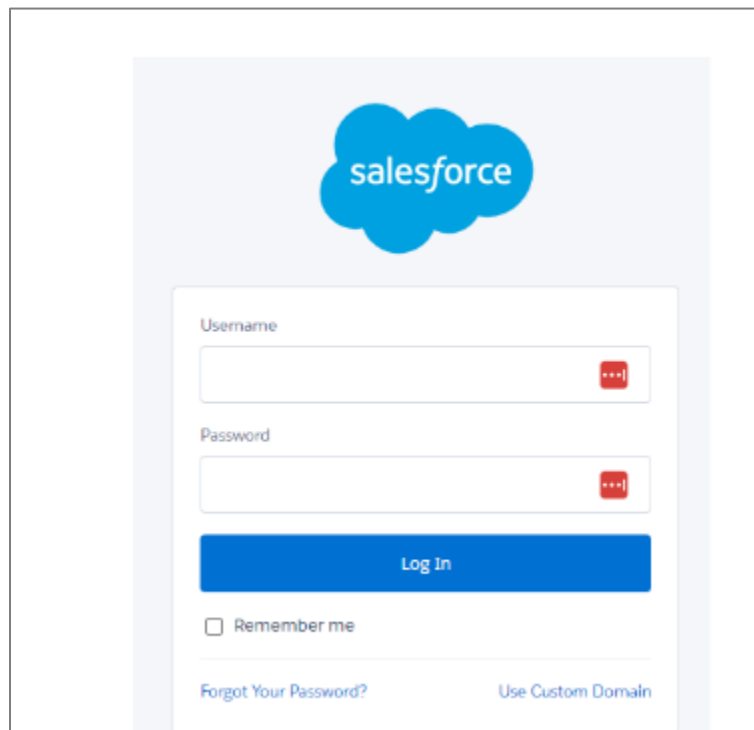


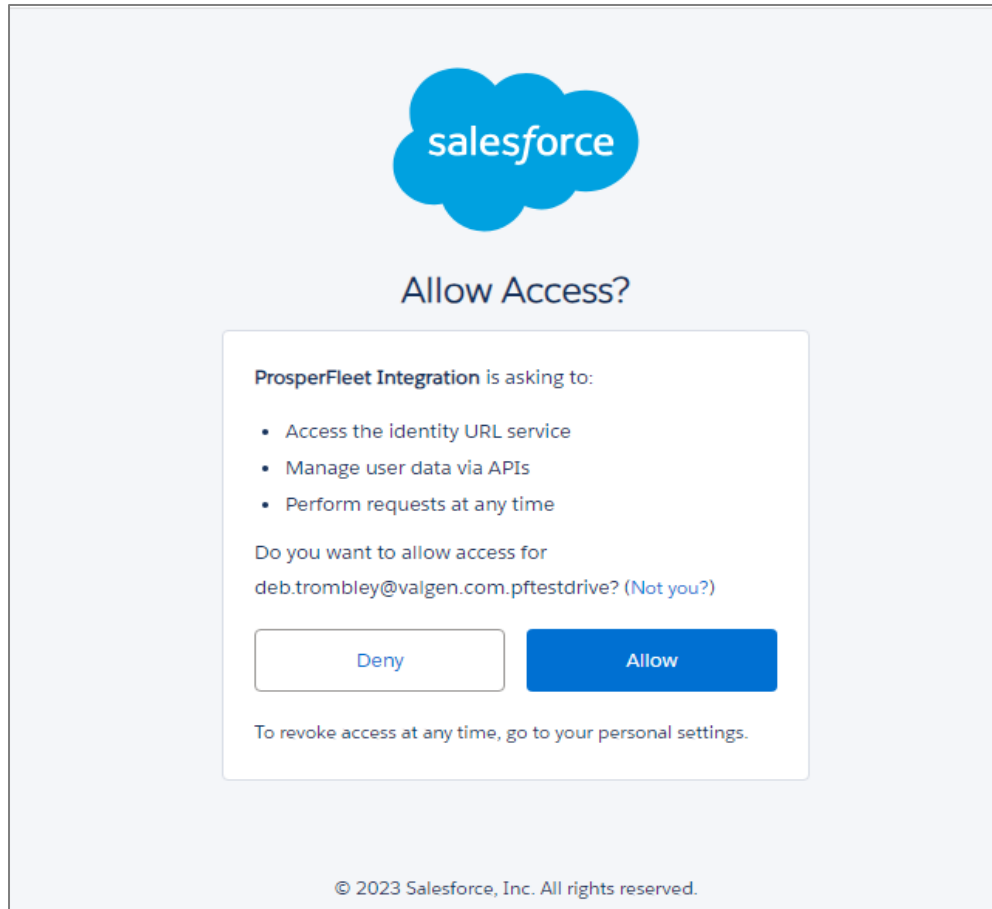


Enter the Consumer Key and Secret Key generated during Connected App creation in Salesforce.

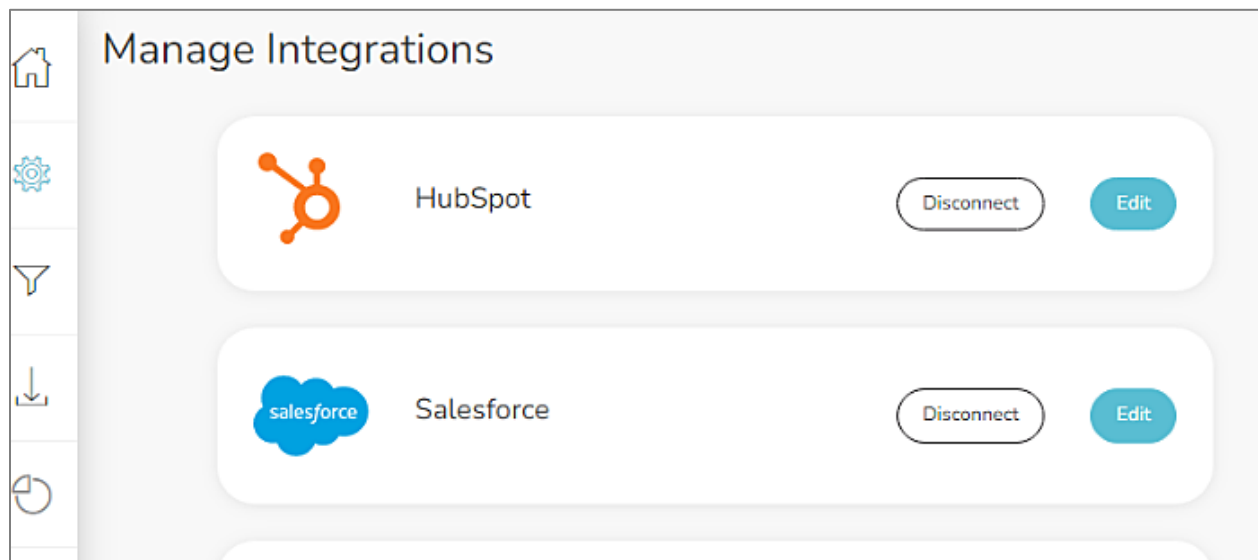
Click 'Submit' to be redirected to the Salesforce authentication page.

Enter the credentials of your Salesforce org and give access:

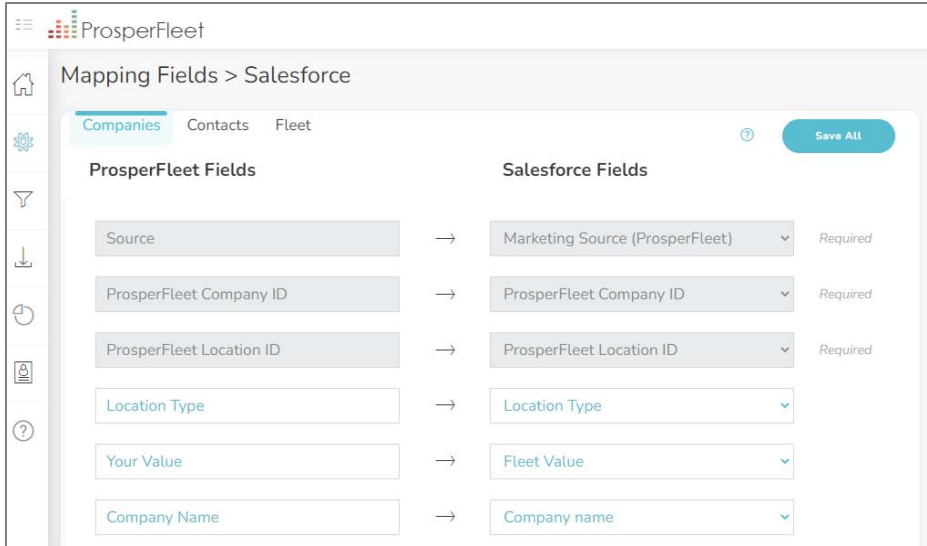




9. Check the connection



After granting permission, the user (or admin) needs to map ProsperFleet's fields to Salesforce. The fields must already exist, ProsperFleet will not create them.

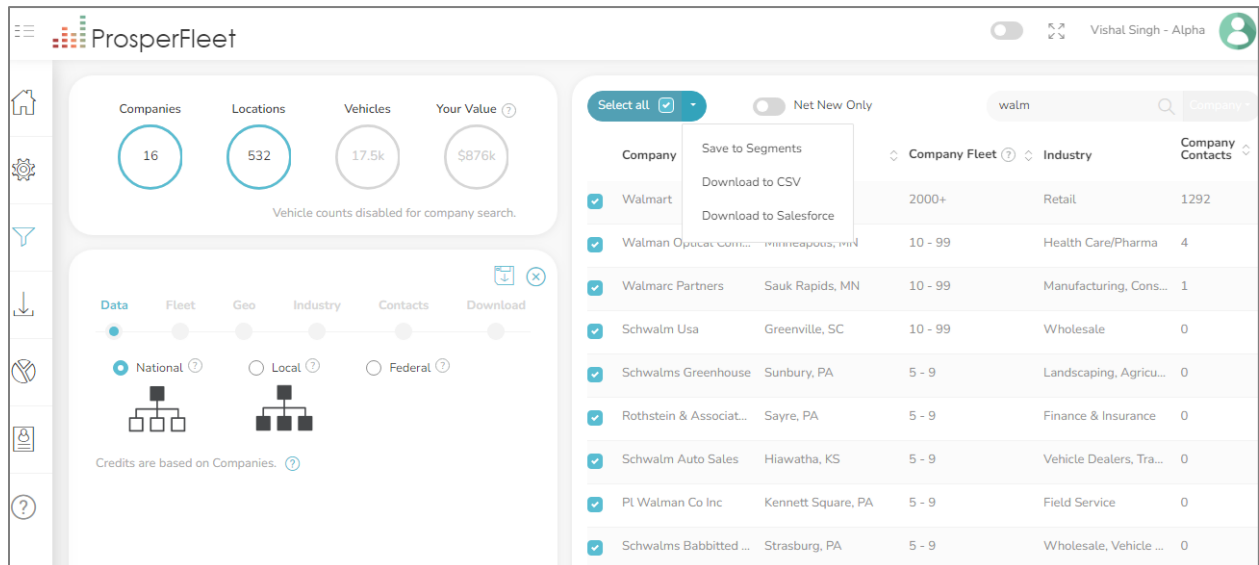


ProsperFleet Fields	→	Salesforce Fields	
Source	→	Marketing Source (ProsperFleet)	Required
ProsperFleet Company ID	→	ProsperFleet Company ID	Required
ProsperFleet Location ID	→	ProsperFleet Location ID	Required
Location Type	→	Location Type	
Your Value	→	Fleet Value	
Company Name	→	Company name	

10. Download data to Salesforce

Once mapping is done, the user can perform the 'Download to Salesforce' action. This action will export ProsperFleet's data to Salesforce.

After field mapping is set up, download a few records in ProsperFleet by choosing "Download to Salesforce." You will also receive an email with a link to a csv file of records exported to Salesforce.



ProsperFleet Dashboard Summary:

- Companies: 16
- Locations: 532
- Vehicles: 17.5k
- Your Value: \$876k

Vehicle counts disabled for company search.

Navigation: Data | Fleet | Geo | Industry | Contacts | Download

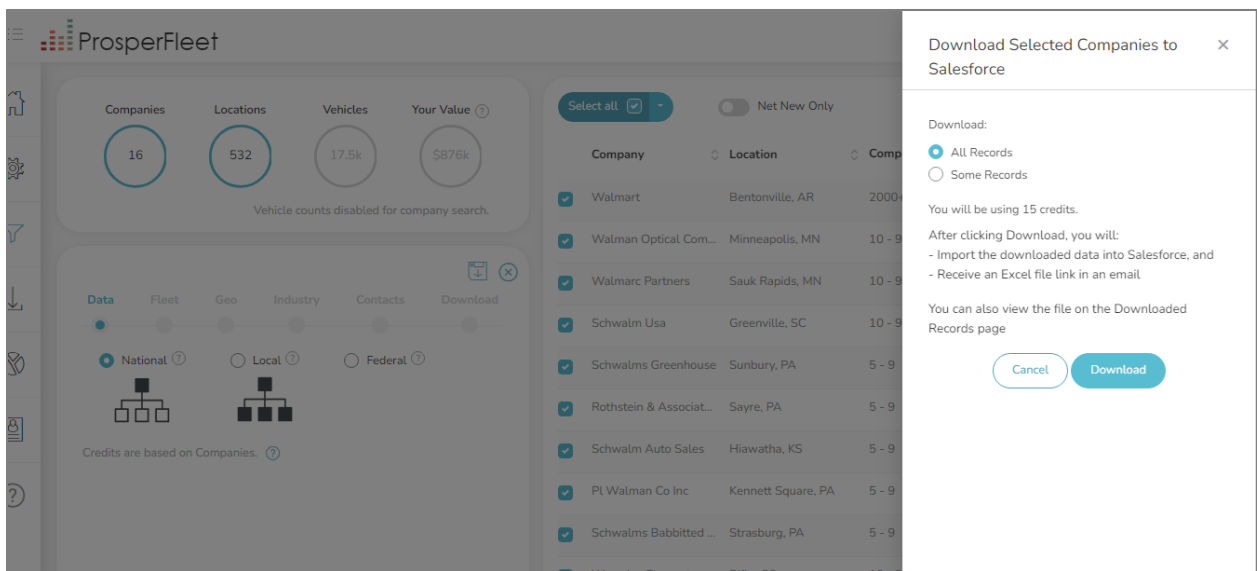
Filters: National (selected), Local, Federal

Company List Table:

Company	Location	Company Fleet	Industry	Company Contacts
☒ Walmart		2000+	Retail	1292
☒ Walman Optical Center - Minneapolis, MN		10 - 99	Health Care/Pharma	4
☒ Walmarc Partners	Sauk Rapids, MN	10 - 99	Manufacturing, Cons...	1
☒ Schwalm Usa	Greenville, SC	10 - 99	Wholesale	0
☒ Schwalm's Greenhouse	Sunbury, PA	5 - 9	Landscaping, Agricu...	0
☒ Rothstein & Associat...	Sayre, PA	5 - 9	Finance & Insurance	0
☒ Schwalm Auto Sales	Hiawatha, KS	5 - 9	Vehicle Dealers, Tra...	0
☒ Pl Walman Co Inc	Kennett Square, PA	5 - 9	Field Service	0
☒ Schwalm's Babbitted ...	Strasburg, PA	5 - 9	Wholesale, Vehicle ...	0

Actions for Selected Company (Walmart):

- Save to Segments
- Download to CSV
- Download to Salesforce



The screenshot shows the ProsperFleet dashboard with a sidebar on the left and a main content area. The main content area has a top section with four circular metrics: Companies (16), Locations (532), Vehicles (17.5k), and Your Value (\$876k). Below this is a section with tabs for Data, Fleet, Geo, Industry, Contacts, and Download. The 'Download' tab is active, showing a list of companies with checkboxes for selection. A dialog box titled 'Download Selected Companies to Salesforce' is open on the right, showing options to download all records or some records, and a 'Download' button.

11. Check if the records are visible in Salesforce

Accounts						
New This Week						
1 items • Sorted by Account Name • Filtered by All accounts • Created Date • Updated a few seconds ago						
	Account Name ↑	Billing State/P...	Billing Coun...	Phone	Acco...	Billing Street
1	2001 Investment Corp	Florida	Hillsborough	using		Po Box 152782
2	2001 Towing & Recovery	New Jersey	Burlington	using		Po Box 2116

Your integration is complete. From now, the “Download to Salesforce” option will push the selected records into Salesforce.