

Nextlane MaxLead for Salesforce - Installation Guide

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1-Objectives

This document describes how to install the Nextlane MaxLead for salesforce application.

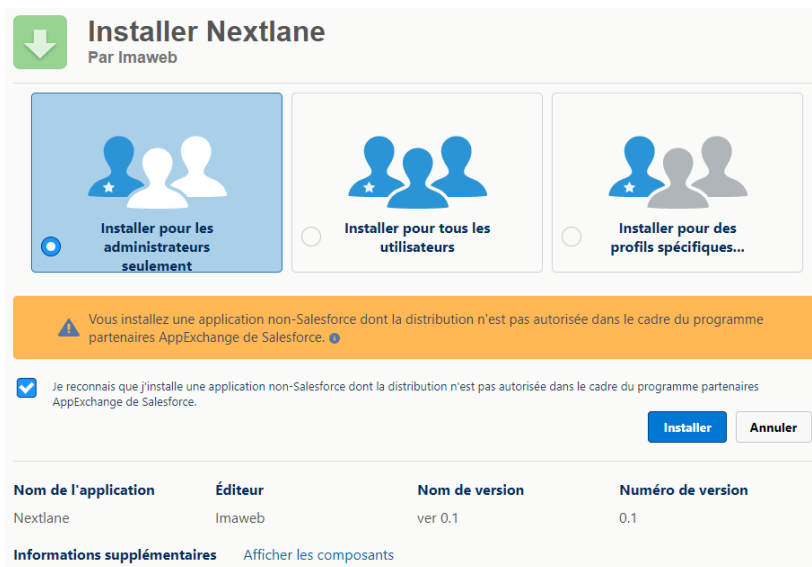
2-Prerequisites

The Nextlane Package can be deployed on Salesforce Lightning versions.
If you aim to use the Lightning Components, the Lightning experience must be enabled in the target organization.

3-Package installation from URL

3-1 Package installation in target environment

- Connect to target environment as a System Administrator
- Replace in package URL hostname (login.salesforce.com) by hostname of target environment (ex: nl-dev-ed.my.salesforce.com, test-salesforce.com for sandbox etc...)
- Copy modified package URL in a new tab of same browser
- Choose option “Install for Admins Only” and click “Install”



The screenshot shows the Salesforce AppExchange installation interface for the 'Nextlane' package by 'Imaweb'. It features three radio button options for installation scope: 'Install for administrators only' (selected), 'Install for all users', and 'Install for specific profiles...'. A warning banner indicates that the application is not authorized for distribution in the AppExchange program. A checkbox confirms the user's acknowledgment of this warning. At the bottom, there is a table with application details and buttons for 'Installer' and 'Annuler'.

Nom de l'application	Éditeur	Nom de version	Numéro de version
Nextlane	Imaweb	ver 0.1	0.1

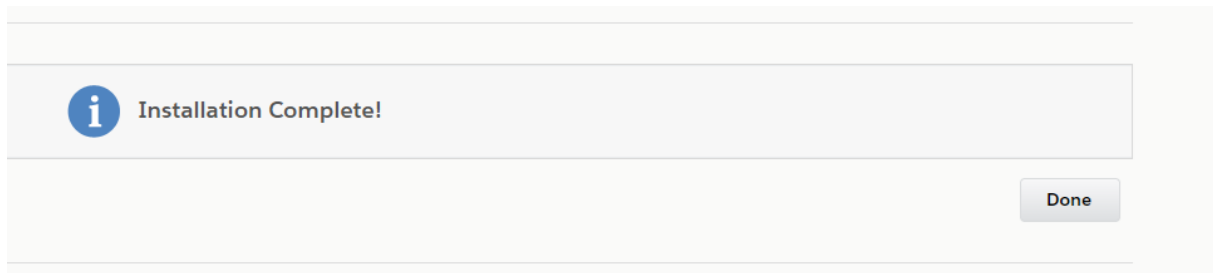
Informations supplémentaires [Afficher les composants](#)

- The installation should take up to few minutes to be complete



Installing and granting access to admins Only...

- At the installation process' end, click “Done”



Installed Packages

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.

[Help for this Page](#)



Installed Packages										
Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects	AppExchange Ready
Uninstall	 Nextlane	Imaveb	0.1	NextlaneLead01	31/08/2023 19:23	✓	1	5	6	Not Passed

4-Manual post-installation configuration steps Nextlane

4.1 Assign permission sets to end users

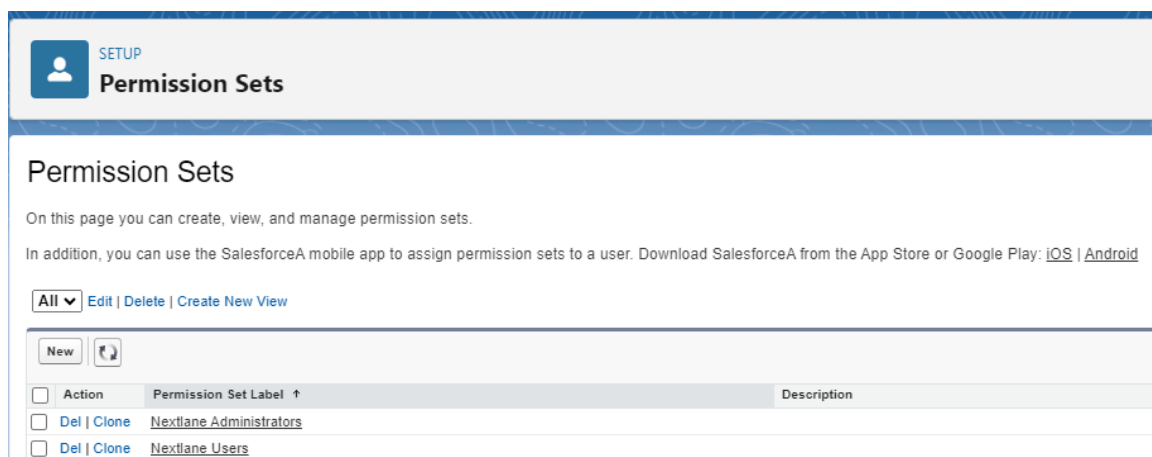
Permission sets are included in package to set accessibility of Nextlane users

- **Nextlane Admin:** this permission set grant access to all Nextlane page and the url website configuration page.
- **Nextlane User:** this permission set grant access to the app.

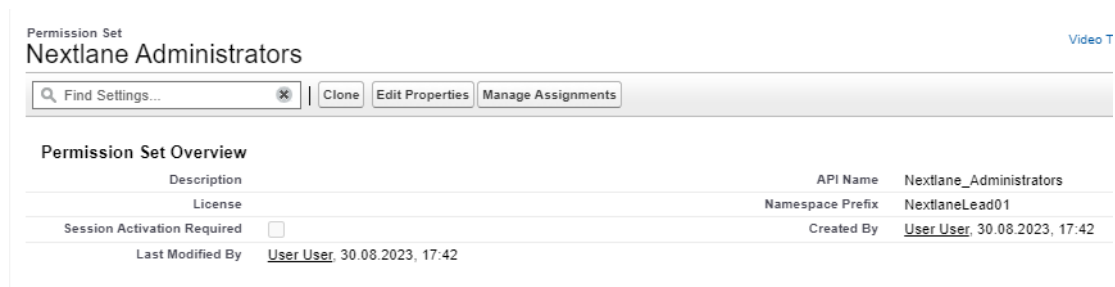
Several permission set can be assigned to a same user; permission set are cumulative.

Assign permission sets to end users:

- Connect to the target environment as a System Administrator
- Enter “**Setup**” menu
- Navigate to “**Users > Permission Sets**”
- Click on “**Nextlane Admin**” permission set



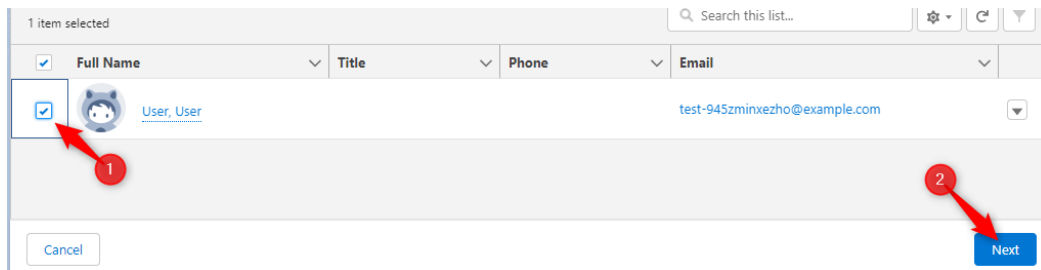
- Click on “**Manage Assignment**”



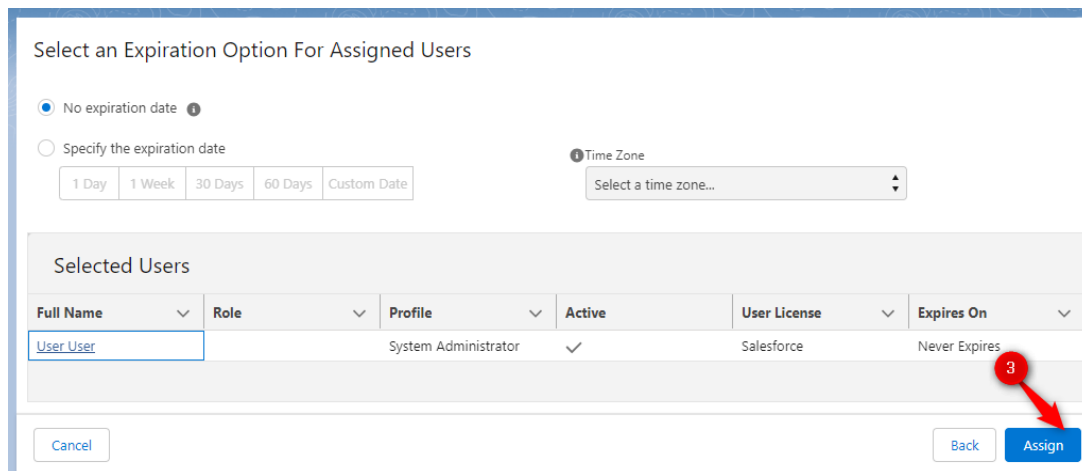
- Click on “**Add Assignment**”

Current Assignments							✎	🗑	Add Assignment
Full Name ↑	Active	Role	Profile	User License	Expires On				
User User	✓		System Administrator	Salesforce					

- Check the checkboxes in front of the users you want the permission set to be assigned.
- Click on **“Next”**



- Click on **“Assign”**

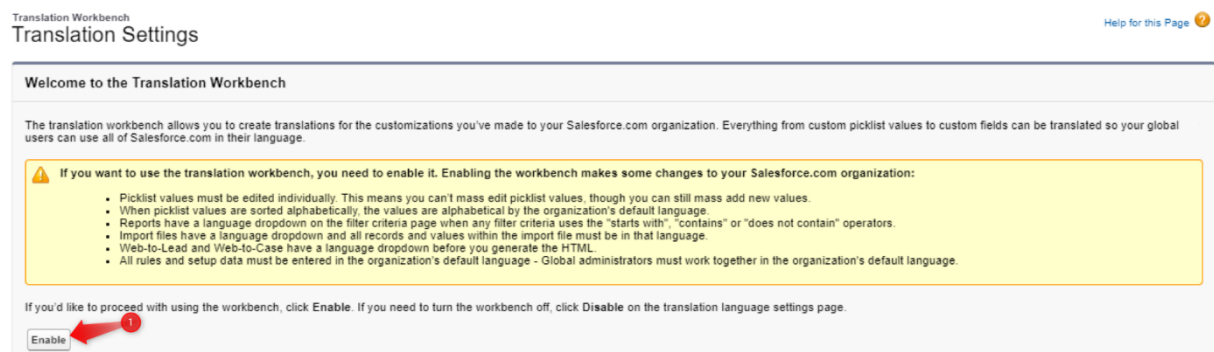



Same operations with **“Nextlane Users”** permission set (for user that don't have the Nextlane administrator's right).

4.2 Set translation languages

Nextlane is developed in English but include Spanish and French translation. To use translation this option must be active on the target org.

- Enter **“Setup”** menu
- Navigate to **“User interface” > Translation Language Settings**
- If not enabled, click on **“Enable”**



- Select the language you want to activate => click on **Edit**

[Help for this |](#)

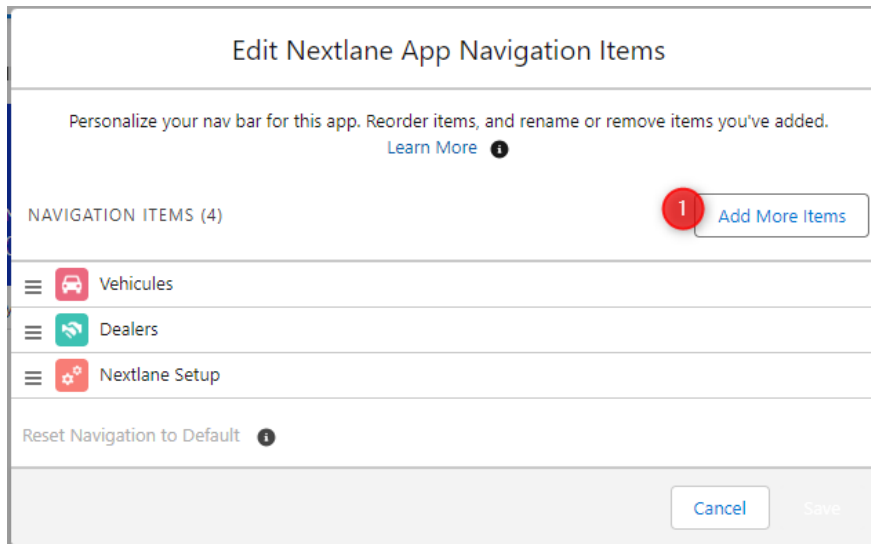
Supported Languages			Add
Active Language	Active	Translator(s)	
Edit French	☐		
Edit Spanish	☐		

-
- The screenshot shows the 'Language Translation Edit' page. At the top, the 'Language' is set to 'French'. Below this, the 'Active' checkbox is unchecked. A red arrow points to this checkbox, labeled with a red circle containing the number '1'. Below the 'Active' checkbox is the section 'Identify Translators for this Language'. It contains a text box for 'Search Users' and a 'Find' button. Below these are two lists: 'Available List' and 'Selected List'. The 'Available List' contains 'Integration User'. The 'Selected List' is empty, showing '--None--'. Between the lists are 'Add' and 'Remove' buttons. At the bottom right, there are 'Save' and 'Cancel' buttons. A red arrow points to the 'Save' button, labeled with a red circle containing the number '2'.

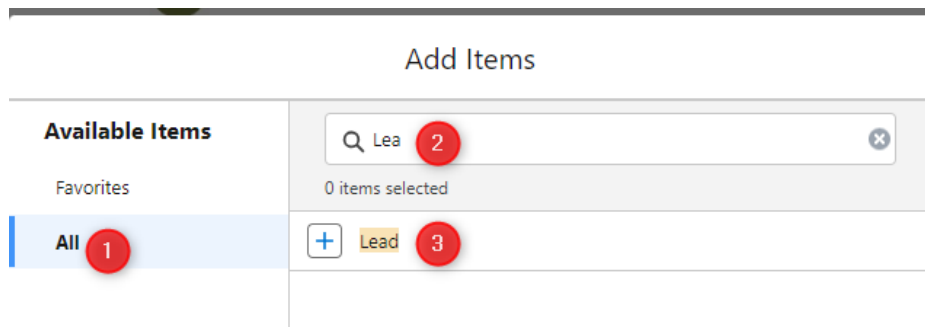
- ### 4.3 (Optional) Add Object tab in custom application


[Vehicles](#)
[Dealers](#)
[Nextlane Setup](#)

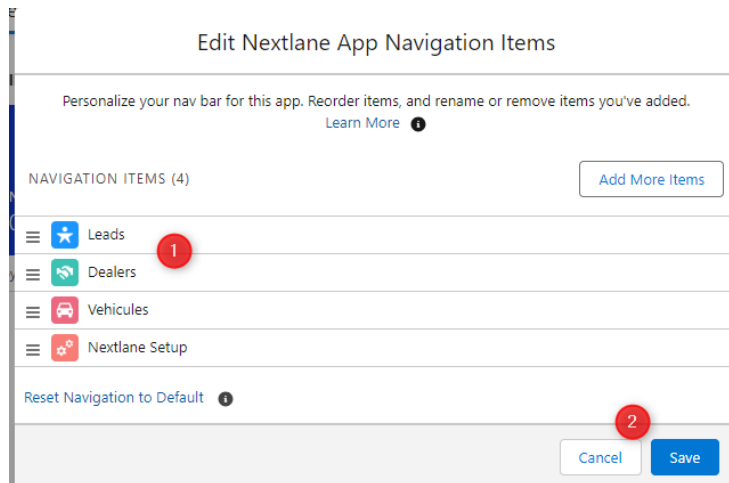
- www.nextlane.com



- Search “Lead” in “All” section and click on the left button to add it.



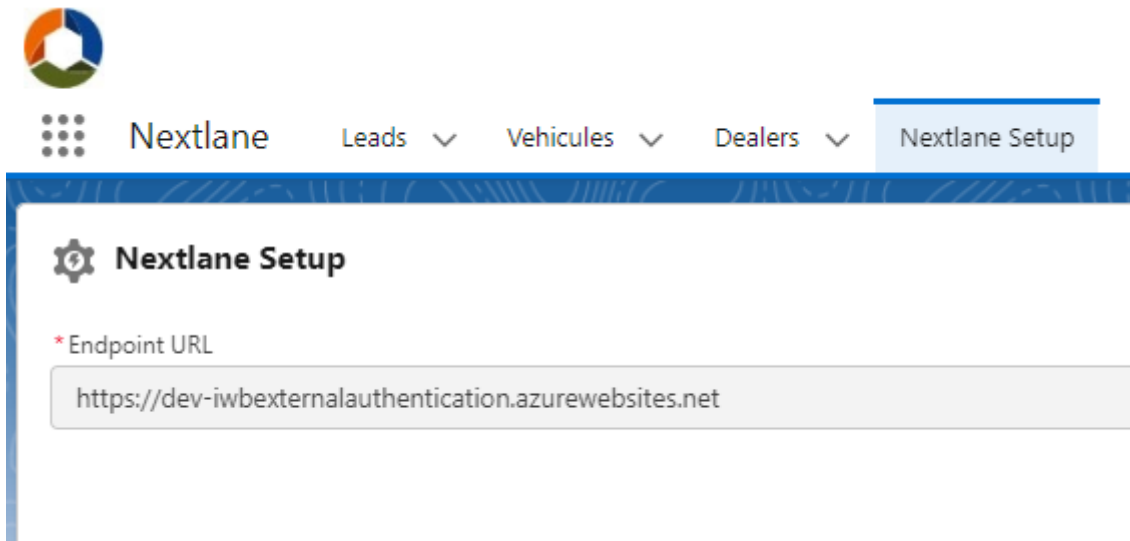
- Drag and drop the new element at the required location and click on the “Save” button



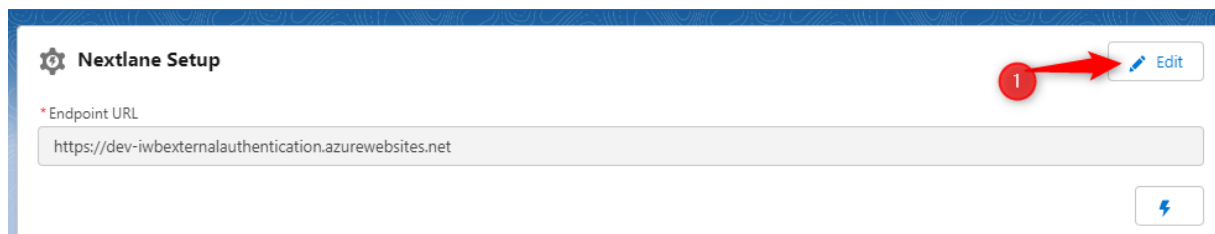
5-Nextlane for Salesforce Setup

5.1 Nextlane Oauth configuration.

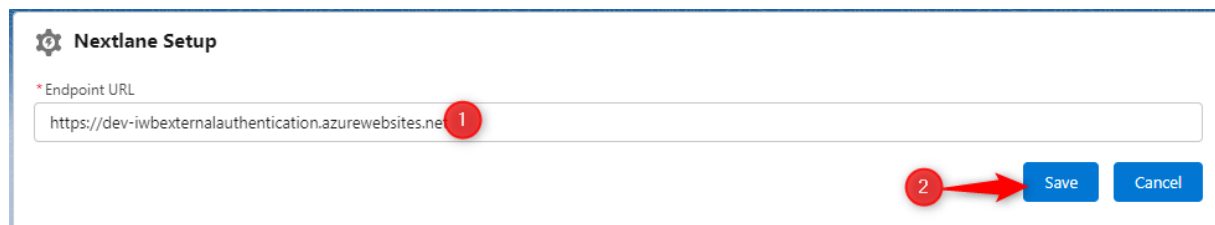
- Connect to target environment with a user who has the “Nextlane Admin” permission set.
- Select the “Nextlane” from the App Launcher then click on the “Nextlane Setup” tab.
- You need to edit and save the url at least once



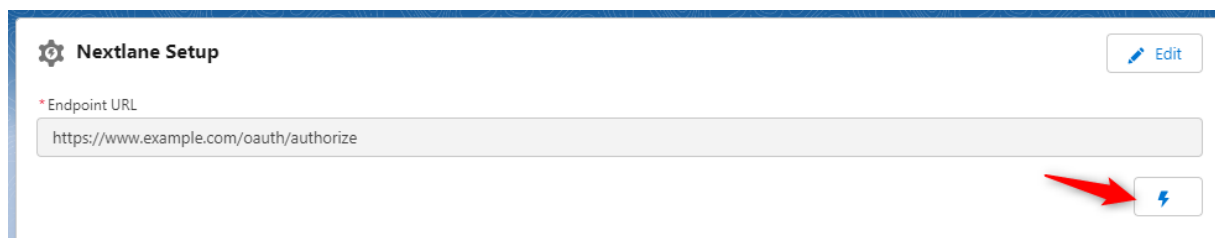
- Click on **“Edit”**



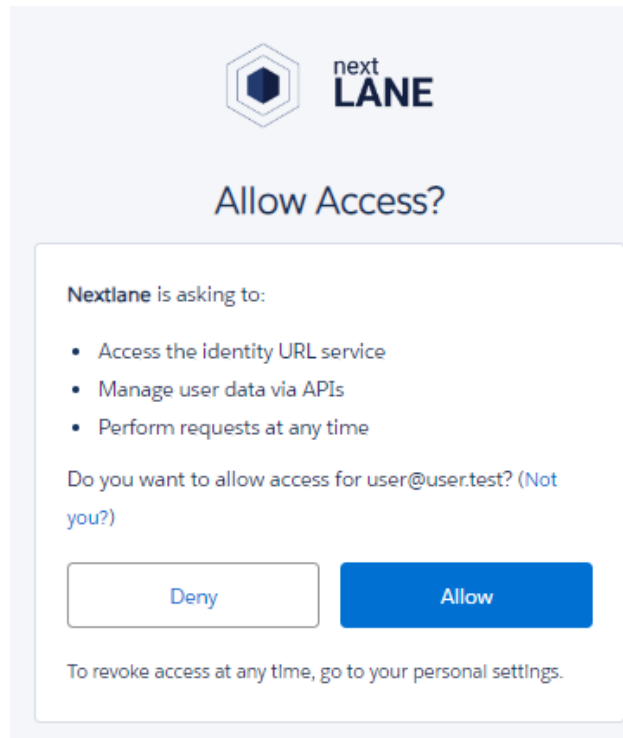
- Change the Endpoint Url (if wrong url)
- Click **“Save”**



- Initiate Oauth connection by Clicking on the lightning button

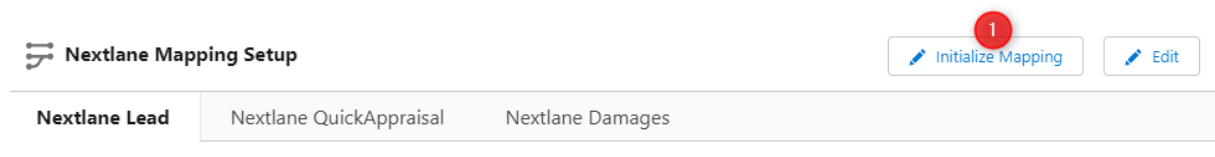


- Click on **“Allow”**

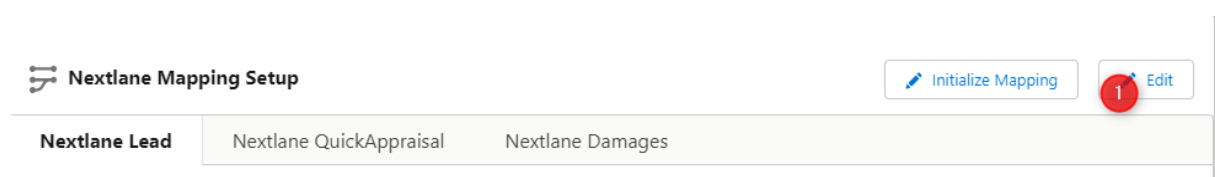


5.2 Initialize mapping

- Method 1: Use Initialize Mapping Button.
 - This method initializes Mapping with the default mapping.
 - Nextlane Lead => Lead object (Standard Salesforce)
 - Nextlane QuickAppraisal => Vehicule object (Custom Salesforce)
 - Nextlane Damages => Damage object (Custom Salesforce)
 - Click on **“Initialize Mapping”**

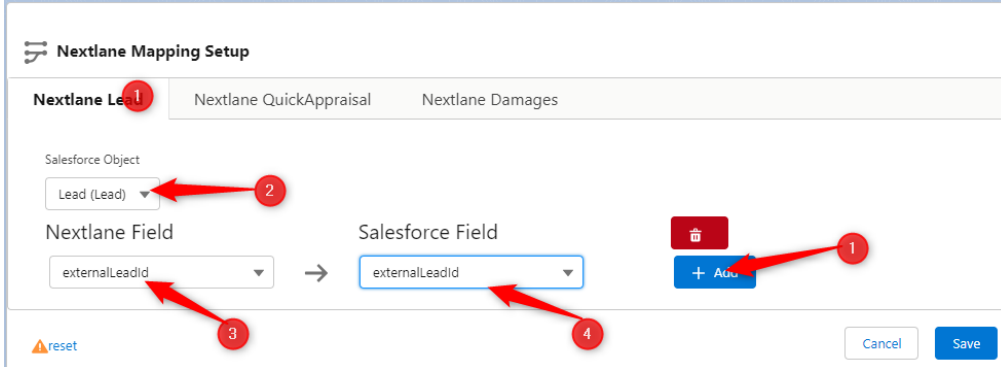


- Method 2: Selecting Salesforce Object and choose field.
 - Click on **“Edit”**



- Select Nextlane Tab Object

- Select Salesforce Obejct
- Select Nextlane Field
- Select Salesforce Field
- Click on “Add”




Same operations for the other tabs and fields.

5.3 Default Mapping

LEAD:

Nextlane Fields	Salesforce Fields
dealerCode	Dealer
Message	Description
externalLeadId	externalLeadId
serviceLead	Service Type
outletCode	outletCode
creationdate	Nextlane creationdate
campaign.name	Campaign Name
campaign.code	Campaign Code
companyInfo.name	Company
companyInfo.cif	Company Fiscal number
companyInfo.gdpr	GDPR
companyInfo.cesiondatos	Consent group
companyInfo.comInfoItems.phone	Phone (company)
companyInfo.comInfoItems.mobile	Mobile (company)
companyInfo.comInfoItems.fax	Fax (company)
companyInfo.comInfoItems.email	Email (company)
companyInfo.addressInfo.addressType	Address type (company)
companyInfo.addressInfo.addressName	Address name (company)
companyInfo.addressInfo.addressNumber	Street (company)
companyInfo.addressInfo.addressExtra	Address Complement (company)
companyInfo.addressInfo.postalcode	Postal code (company)

companyInfo.addressInfo.city	City (company)
companyInfo.addressInfo.province	State (company)
companyInfo.addressInfo.country	Country (company)
privateInfo.firstname	FirstName
privateInfo.surname1	LastName
privateInfo.gender	Gender
privateInfo.birthday	Birthday
privateInfo.nif	Fiscal ID
privateInfo.nationality	Nationnality
privateInfo.privacy	Global Consent
privateInfo.privacyGroup	Global consent for the Dealer Group
privateInfo.comInfoItems.phone	Phone
privateInfo.comInfoItems.mobile	Mobile Phone
privateInfo.comInfoItems.fax	Fax
privateInfo.comInfoItems.email	Email
privateInfo.addressInfo.addressType	Address type
privateInfo.addressInfo.addressName	Address name
privateInfo.addressInfo.addressNumber	Street
privateInfo.addressInfo.addressExtra	Address Complement
privateInfo.addressInfo.postalcode	Postal Code
privateInfo.addressInfo.city	City
privateInfo.addressInfo.province	State
privateInfo.addressInfo.country	Country
additionalInfo.customerVehicule.plate	Plate number of the customer vehicle
additionalInfo.customerVehicule.brandAndModel	Customer vehicule Description
additionalInfo.QuickAppraisalID	Vehicule
additionalInfo.origine	Origine
additionalInfo.suborigine	Sub Origine
additionalInfo.tradetype	Project type
additionalInfo.vehicule.budget	Budget
additionalInfo.vehicule.carBody	Car Body
additionalInfo.vehicule.energy	Energy
additionalInfo.vehicule.funding	Funding
additionalInfo.vehicule.mileage	Mileage
additionalInfo.vehicule.timing	Timing
additionalInfo.vehicule.tradeIn	TradeIn
additionalInfo.vehicule.plate	Project plate
additionalInfo.vehicule.brandAndModel	Brand and Model
additionalInfo.leadsubtype	Lead Subtype
additionalInfo.quotationNumber	Quotation Number
additionalInfo.reparationOrder	Reparation Order

additionalInfo.emailBodyHtml	Customer feedback 2
additionalInfo.vehicule.comment	Customer feedback 1
additionalInfo.vehicule.rating	Customer feedback rating
additionalInfo.leadtype	Lead Type

QuickAppaisal:

Nextlane Fields	Salesforce Name
finishDescr	Finish of the vehicle
colourDescr	Colour of the vehicle
mileageValue	Odometer reading of the vehicle
vin	Vin
FirstRegistrationDate	First Registration Date
estimatedPurchasePrice	Estimated purchase amount of the vehicle

Damages:

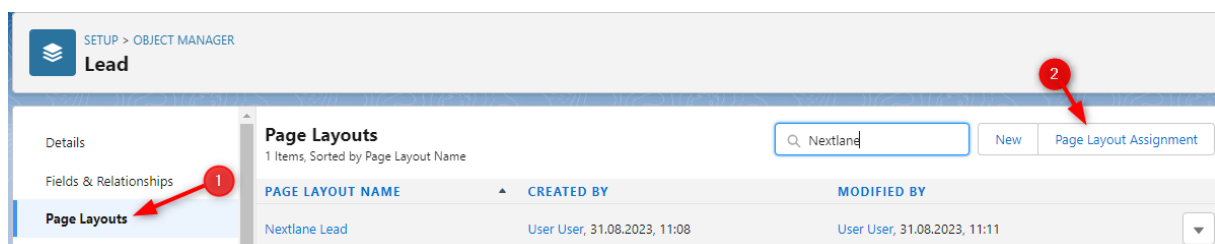
Nextlane Fields	Salesforce Name
amount	Repair cost for the damage
description	Description for the damage
Quickappraisale	Vehicule

5.4 Assign the package Layout

- Go to “**Setup**“, select “**Object Manager**“, type the name of the object in the search bar (ex: Lead)



- Select “**Page Layouts**“, click on “**Page Layout Assignment**”



- Click on **“Edit Assignment”**, then select the profiles whose users should have access to the page (if there are more than one Record Type, the assignment will be for the profile, by record type), choose the **“Nextlane Lead Layout”** then save the modification.

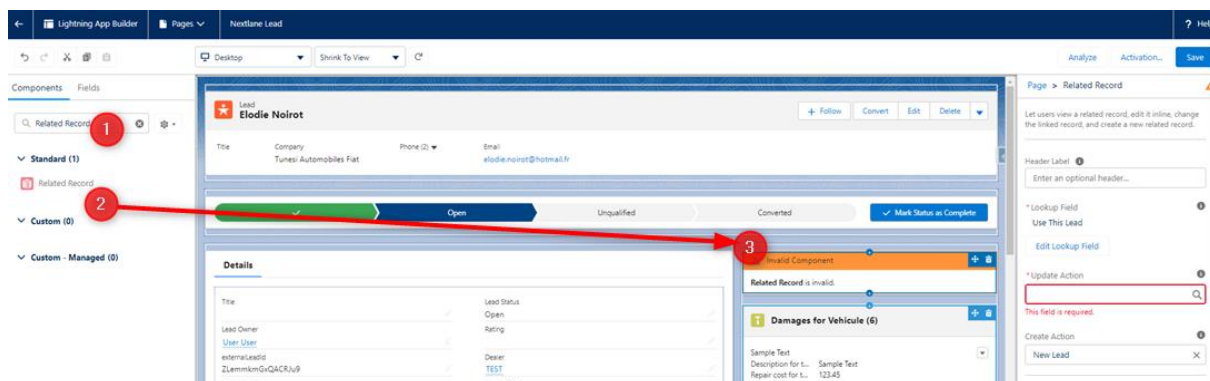
Edit Page Layout Assignment
Lead

The table below shows the page layout assignments for different profiles. Use SHIFT + click or click and drag to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent.

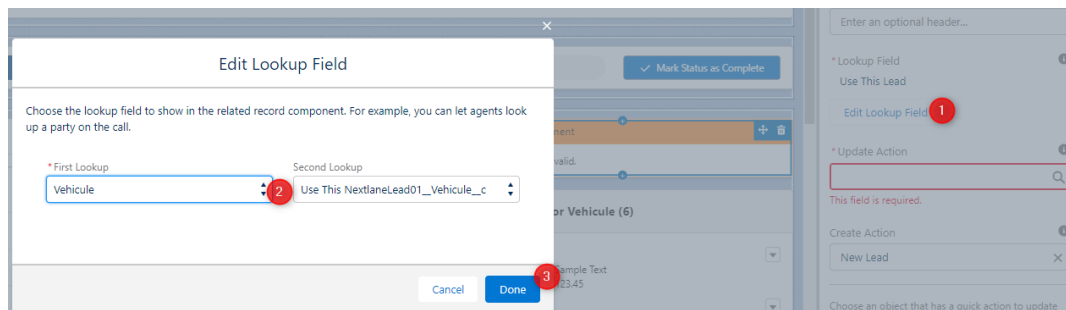
3 Save Cancel		
Page Layout To Use: -- Select Page Layout -- 1 Selected 0 Changed		
Profiles		Page Layout
Analytics Cloud Integration User		Nextlane Lead
Analytics Cloud Security User		Nextlane Lead
Contract Manager		Nextlane Lead
Marketing User		Nextlane Lead
Minimum Access - Salesforce		Not Assigned
Salesforce API Only System Integrations		Nextlane Lead
Service Cloud		Nextlane Lead
Solution Manager		Nextlane Lead
Standard User		Nextlane Lead
System Administrator		Nextlane Lead
1 Save Cancel		

5.5 Edit the Nextlane Lead Lightning Record Page

- Go to **“Setup”**, select **“Object Manager”**, type **“Lead”** in the search bar
- In **“Component”**, search **“Related Record”**
- Drag And Drop the component above **“Damage for Vehicle”**



- Edit Options:
 - Edit Lookup Field: Set First Lookup to Vehicle and click on **“Done”**



- Edit Update Action (if not set): Select **“Update Vehicle”**

Header Label ⓘ

Enter an optional header...

* Lookup Field ⓘ

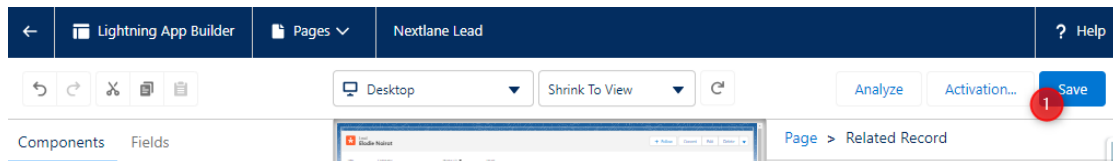
Vehicle

Edit Lookup Field

* Update Action ⓘ

Update vehicle

- Click on **“Save”** and close the window



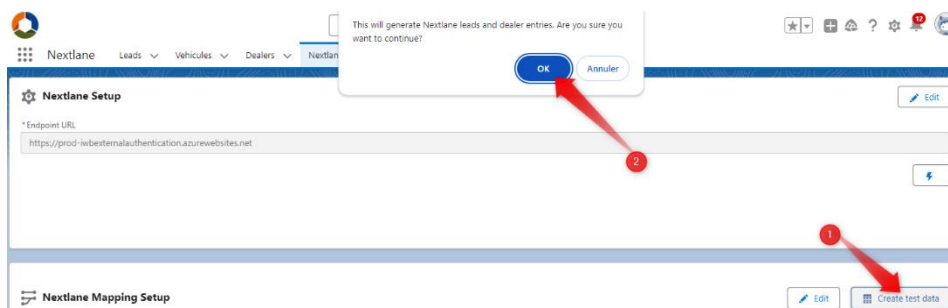
5.6 (Optional) Add Test Data

You can create test data.

Please note that you cannot create data until the fields have been mapped.

The button provided for this purpose will only be visible once the mapping elements have been added.

- Click on **“Create test data”** and **confirm**



6–Create Flow using Flow Builder

With Flow Builder, you can configure automatic patterns for your lead management. These automations can be triggered when a lead is created, updated or deleted.

You will have to specify the conditions of the filters that your lead has to match to enter the automation, and then choose how this lead will be managed.

For example, you can automatically assign a specific dealer user to a lead or change the status of the lead.

7–Uninstall package from an environment

7.1 Preparation

To uninstall Nextlane package, all setup performed after its installation need to be removed.

- Unassigned Nextlane permission set (Admin and User).

7.2 Package uninstallation

- Connect to target environment as a System Administrator
- Enter “**Setup**” menu
- Navigate to: “**Apps > Packaging > Packages Manager**”
- Click on “**Uninstall**” in front of Nextlane package
- Select your save option

☐ Save a copy of this package's data for 48 hours after uninstall

☒ Do not save a copy of this package's data after uninstall

☒ Yes, I want to uninstall this package and permanently delete all associated components

Uninstall