

Express Tasks Installation Guide v1.1

By Leaping Fox LLC

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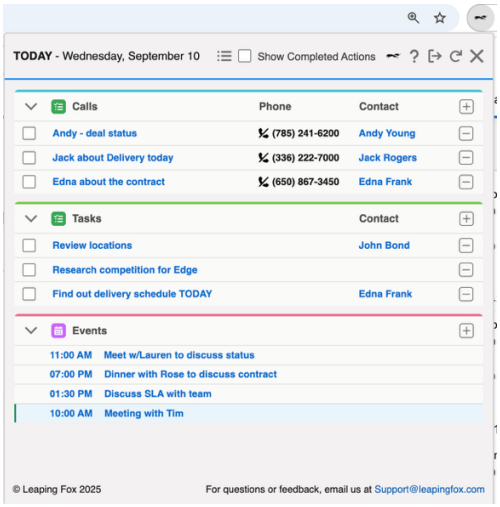
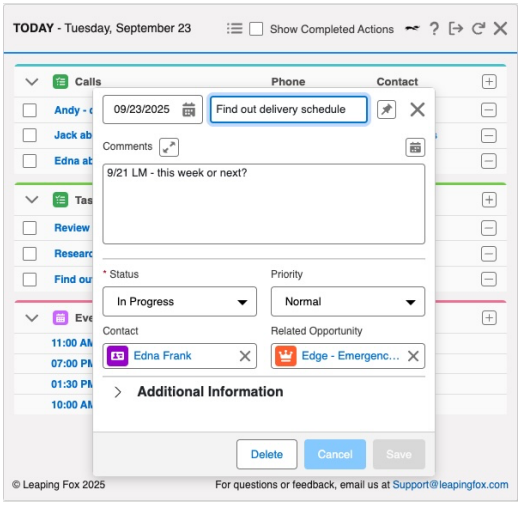
INTRODUCTION

Express Tasks™ is a new to-do facility for the Salesforce platform. It offers an innovative way to manage Tasks, Calls and Calendar Events in Salesforce from a Chrome Extension.

Express Tasks operates as a drop-down from the Chrome Extension tray and integrates directly with Salesforce without the user needing to be on a Salesforce screen or tab.





Express Tasks utilizes an innovative “pop-up” approach to display Activity details, where the user simply hovers on any item in blue to display its detail.

The pop-ups appear in edit mode, so the user can easily view, update and create Salesforce Tasks and Calendar events.

The user can also hover on “object” fields like Accounts, Contacts and Opportunity that are displayed in these Activities to reveal commonly used fields like phone, email, Opportunity amount and close date.

Pop-ups for these objects can “cascade” (i.e. pop-up from a pop-up) up to three times, so a user could view Contact, Account or Opportunity data directly from another pop-up.

Express Tasks also allows the user to separate “Call” tasks from other tasks and activities simply by putting “Call” at the beginning of the subject line of any task.

Express Tasks brings a new level of ease in task management to the Salesforce platform. It replicates the “Today” task facility of the Leaping Fox Express Console, but does not require this application to operate. It interacts directly with the Salesforce Sales Cloud.

It is currently available free of charge.

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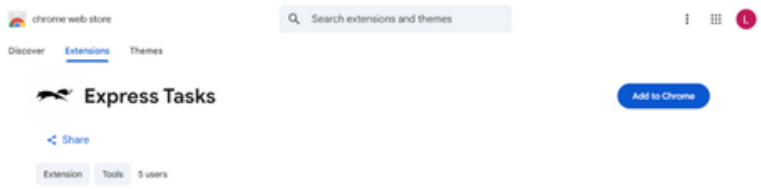
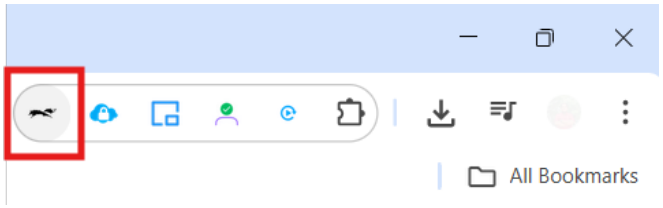
INSTALLATION STEPS

To install the Express Tasks Extension:

1. Visit the Chrome Web Store page for Express Tasks: https://chromewebstore.google.com/detail/express-tasks/pnigojoajidbannmmpjipfipplhhldae?authuser=1&hl=en



2. Click *Add to Chrome*.
3. You will be prompted to grant the following permissions:
    - Read and change your data on all lightning.force.com sites, all my.salesforce.com sites, and login.salesforce.com
4. The extension will be installed within a few moments.
5. Pin Express Tasks to the **Extensions Shortcut Bar** for easiest use. To pin it:
    - Click the Extensions icon (last icon on the shortcut bar).
    - Locate Express Tasks in the list and click the pin icon.
    - Once pinned, you can access Express Tasks anytime by clicking its logo in the **Extensions Shortcut Bar**.



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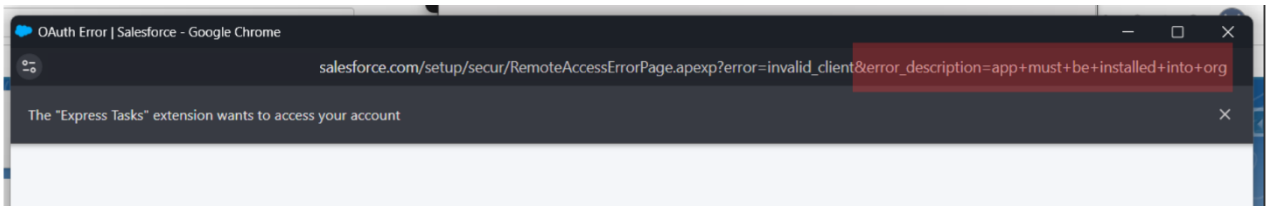
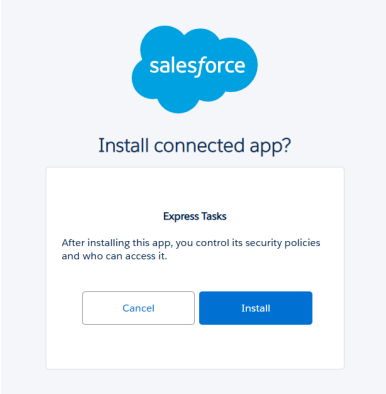
LOGIN PROCESS

Due to a Salesforce security enforcement related to Connected Apps, users will need to have their Salesforce Administrator approve a connection for Express Tasks. If they try to sign in without this authorization, they will see the following error: “app must be installed into org”



There are two ways to enable access for the Connected App. We recommend Option 1, which gives your Salesforce Administrator full control over who can use Express Tasks.

1. **Option 1 Install and approve the Connected App for your org (Recommended)**
   Your Salesforce Administrator installs the app once and chooses exactly which users can access it.
   a. Sign in to Salesforce as a System Administrator.
   b. Open a new browser tab and paste the approval link (shown below these steps) into the address bar.
   c. The Salesforce “Install connected app” page will open.



   d. Review the app details and click **Install**.
   e. In Setup, go to **Connected Apps OAuth Usage**, find **Express Tasks**, and click **Manage App Policies**.
   f. Click **Edit Policies**. Under **Permitted Users**, select **“Admin approved users are pre-authorized”** and save.
   g. On the same page, add the **profiles** or **permission sets** whose users should have access to Express Tasks.

   Only users with those profiles or permission sets can log in, and you can remove access at any time.

A Salesforce Administrator can open the following link in their Salesforce org to approve the app:
https://login.salesforce.com/identity/app/AppInstallApprovalPage.apexp?app_id=0CiU100000007zB&app_org_id=00D3h00000699mR

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2. **Option 2: Temporary access for a single user (trial or evaluation only)**
   Use this only to let one user try Express Tasks before the app is installed for the org.
   a. In Setup, open a permission set (recommended) or the user's profile.
   b. Under **System Permissions**, enable **"Approve Uninstalled Connected Apps"** and assign it to the user.
   c. The user logs in to Express Tasks and authorizes the app.
   d. **Remove the permission right after the user has logged in.** Salesforce advises granting it only for as long as authorization takes.

   For ongoing use, we recommend completing Option 1.

USING EXPRESS TASKS

To begin using Express Tasks, follow these steps to log in to your Salesforce account from the Chrome Extension:

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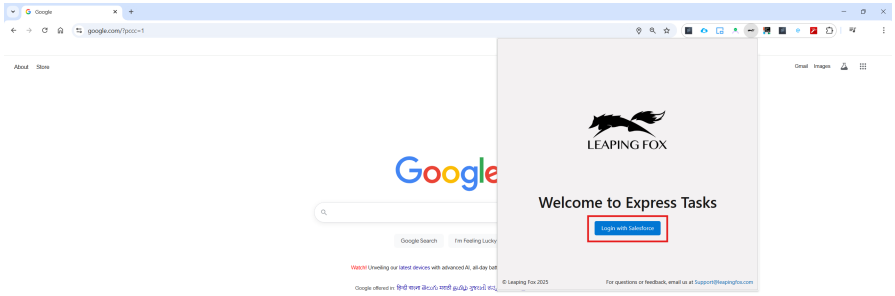
1. Open Express Tasks

Click the Express Tasks icon in your Chrome Extensions Shortcut Bar to open the extension dropdown.

2. Log in

Click the **"Log in to Salesforce"** button.



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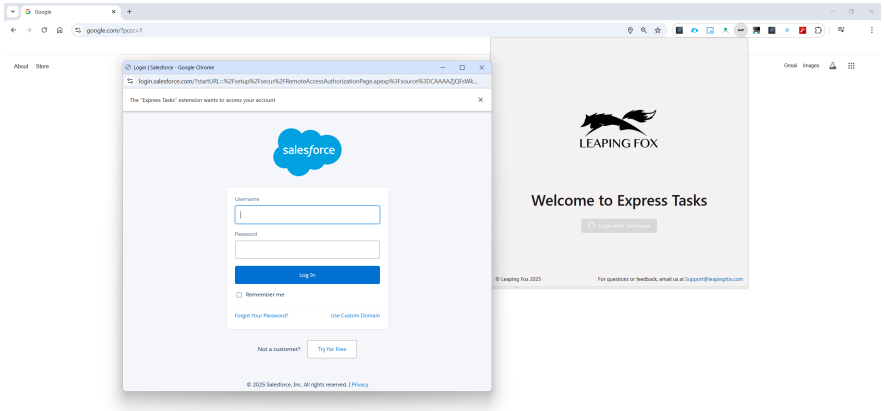
3. Authorize the Extension

A Salesforce login window will appear. Enter your Salesforce username and password, then click **Log In**.



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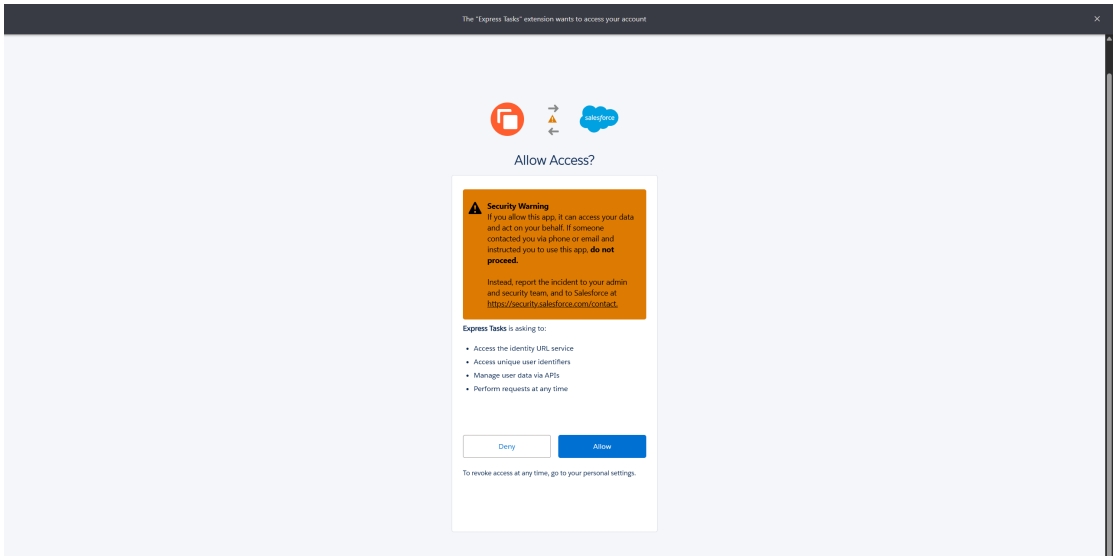
4. Grant Permissions

If prompted, review the requested permissions and click **Allow** to authorize the extension to connect to your Salesforce account.



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5. Successful Login

Once authentication is complete, you'll see a **"Login Successful"** message in the Express Tasks. Your Tasks, Calls, and Events will begin loading automatically.
