



# Express Tasks Installation Guide v1.0

By Leaping Fox LLC

# 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 Tabs utilizes an innovative “pop-up” approach to display Activity details, so the user can view, update and create Salesforce Tasks and Calendar events directly from the pop-up. It also allows the user to segregate “Call” tasks from other tasks and activities.

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 can view Contact, Account or Opportunity data directly from another pop-up.

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 work. It interacts directly with the Salesforce Sales Cloud.

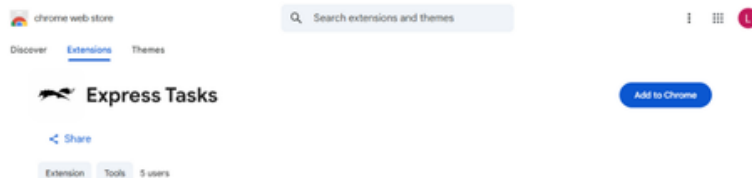
It is currently available free of charge.

# INSTALLATION STEPS

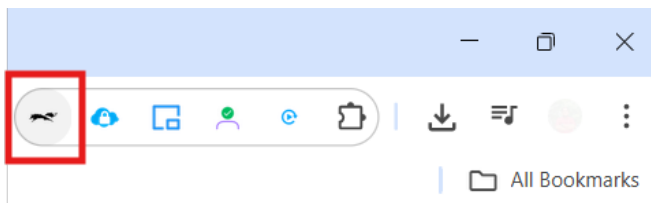
To install the Express Tasks Extension:

1. Visit the Chrome Web Store page for Express Tasks:

<https://chromewebstore.google.com/detail/express-tasks/pnigojoajidbannmmpjipfipplhhldae?authuser=1&hl=en>

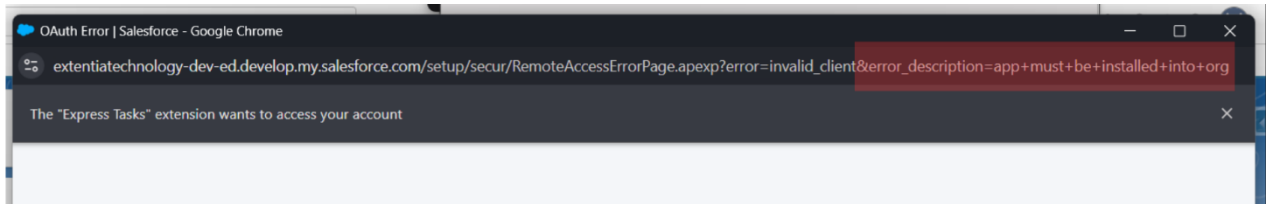


2. Click *Add to Chrome*.
3. You will be prompted to grant the following permissions:
  - Read and change your data on all [lightning.force.com](https://lightning.force.com) sites, all [my.salesforce.com](https://my.salesforce.com) sites, and [login.salesforce.com](https://login.salesforce.com)
4. The 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**.



# SECURITY AUTHORIZATION

Due to a Salesforce security enforcement related to Connected Apps, users will see the following error when attempting to log in to Express Tasks: “app must be installed into org”



This occurs when the Connected App has not yet been approved by a Salesforce Administrator in the user’s org. New users must have the Connected App approved before they can sign in.

There are two options to enable access:

1. **Assign the Salesforce permission “Approve Uninstalled Connected Apps”**

This option allows admins or integration owners to authorize Connected Apps without installing it in the org.

**Setup Navigation Steps:**

- a. Go to Salesforce Setup.
- b. Open either the User Profile or Permission Set for the user.
- c. Edit the permissions.
- d. Under System Permissions, enable the permission: “Approve Uninstalled Connected Apps”

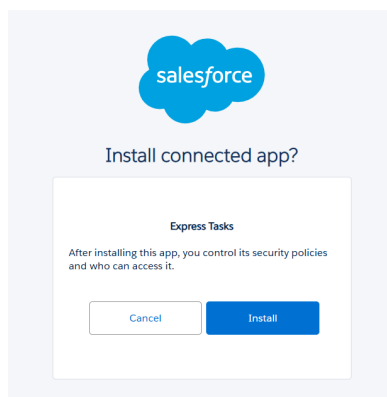
Once this permission is assigned, the user can log in to Express Tasks without requiring prior Connected App approval.

2. **Approve the Connected App at the org level.**

- a. Sign in to your Salesforce org as a System Administrator.
- b. Open a new browser tab and paste this approval link from below into the address bar:

[https://login.salesforce.com/identity/app/AppInstallApprovalPage.apexp?app\\_id=0CiU100000007zB&app\\_org\\_id=00D3h00000699mR](https://login.salesforce.com/identity/app/AppInstallApprovalPage.apexp?app_id=0CiU100000007zB&app_org_id=00D3h00000699mR)

- c. The Salesforce Connected App Install / Approval page will open.



- d. Review the app details and click Install / Approve.
- e. Grant user access using either profiles or a permission set.

## USING EXPRESS TASKS

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

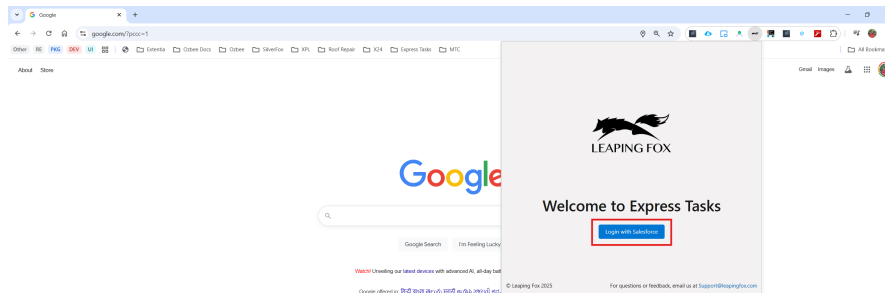
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### 1. Open Express Tasks

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

### 2. Log in

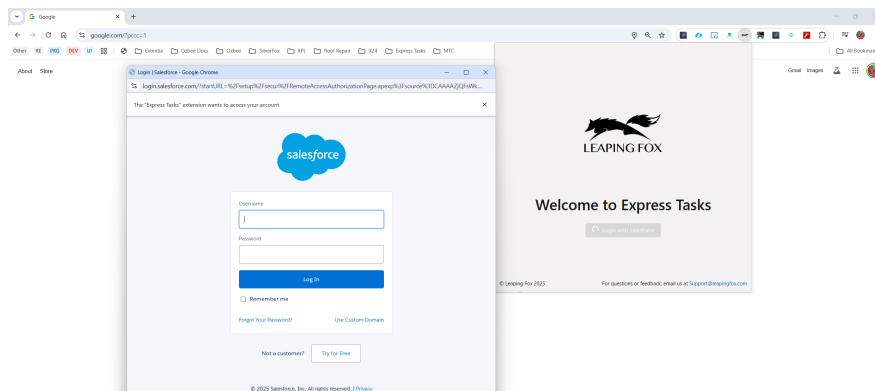
Click the “Log in to Salesforce” button.



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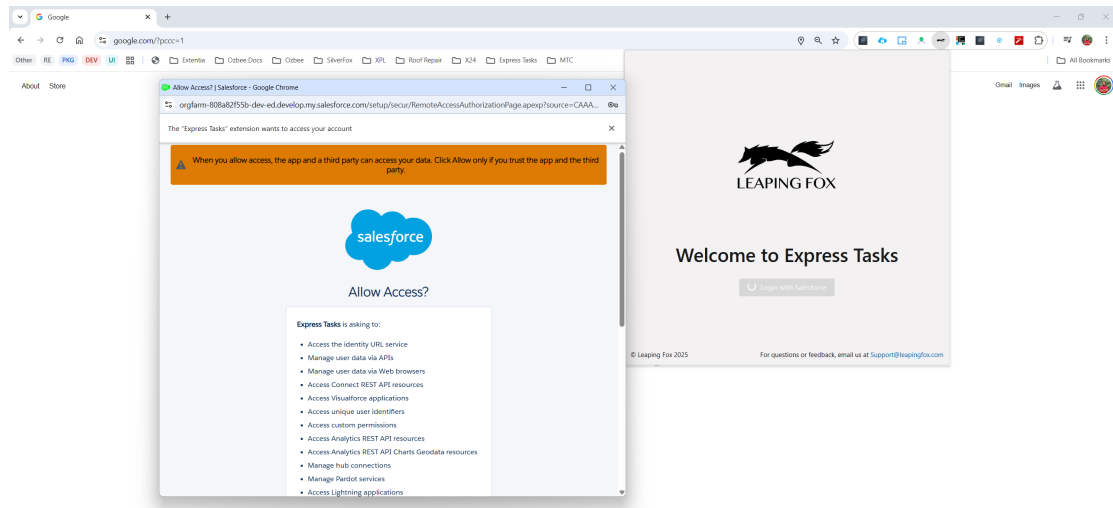
### 3. Authorize the Extension

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



## 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.

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