

PRO Salesforce Connector

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About this Application

This application was developed to aid in ongoing sales support activities managed through salesforce. This documents serves to inform new/existing users on how to use the PRO Salesforce Connector and also how to manage ongoing maintenance of the extension.

How to Use This Application

Installation

Meeting Sheet Generator

Meeting sheets can be created by clicking of the PRO RPA icon on found of the browser

Application Acknowledgments and Licenses

Version History

Version 0.5.0

- Primary beta testing release
- Current functionalities
 - Authenticate rest API using following salesforce's outline [insert link here]
 - Initial development of popup user interface includes "meeting sheets", authorization, and help button
 - Meeting sheets developed using lightning force experience only, meeting sheets can only be generated on a "Client Activity" page and nowhere else including the listing of client activities page (individual activities only)