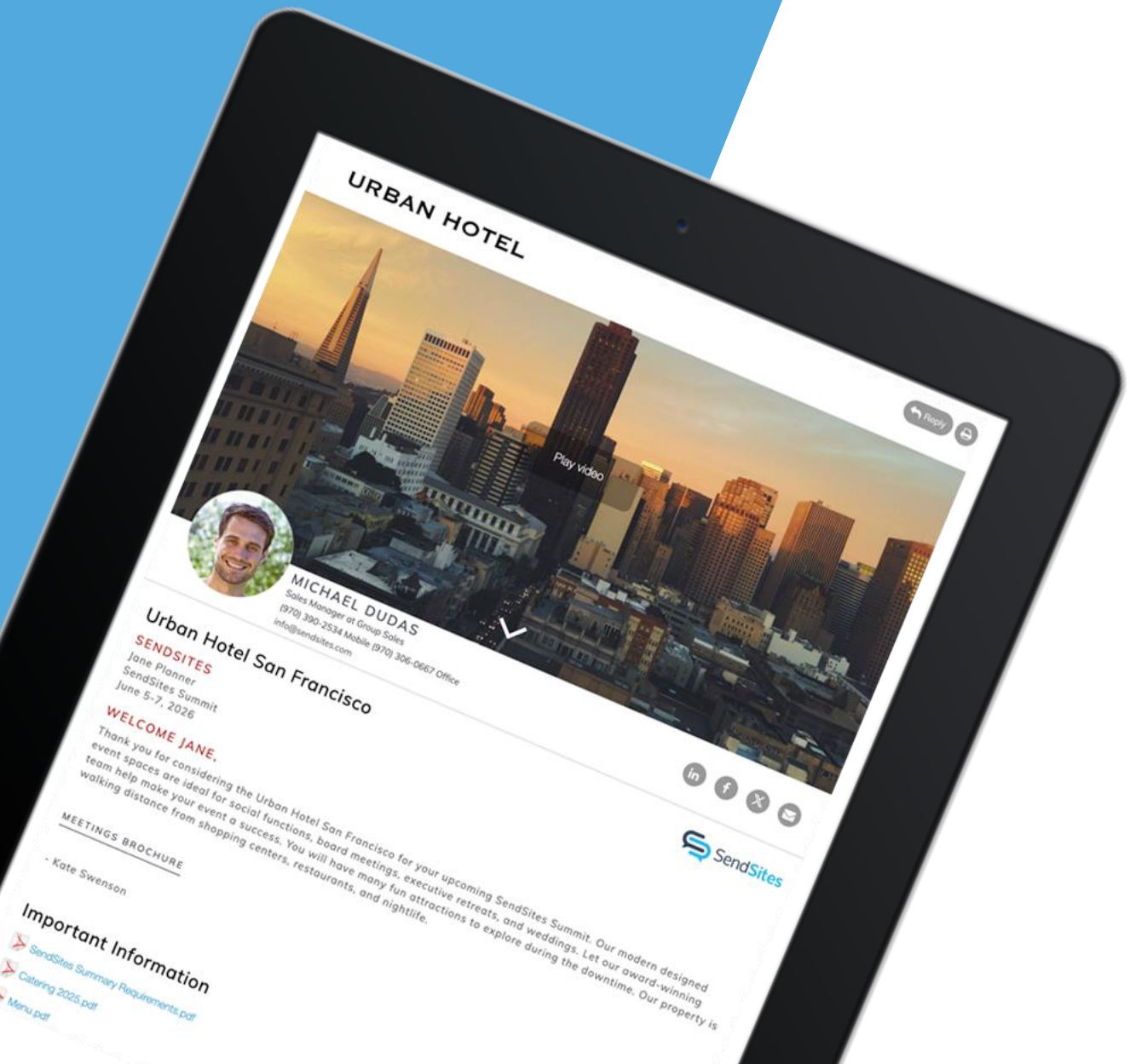
Connecting SendSites to Salesforce

A one-time setup guide for Admin Users

SendSites + Amadeus Sales & Catering - Delphi® Integration

SendSites



Introduction

This one-time setup guide walks you through how to connect your SendSites account to Salesforce's Amadeus Sales & Catering Delphi FDC using OAuth authorization.

Important

Only one system administrator from your organization needs to follow these steps. All other users will benefit from this connection automatically - no setup needed on their part.

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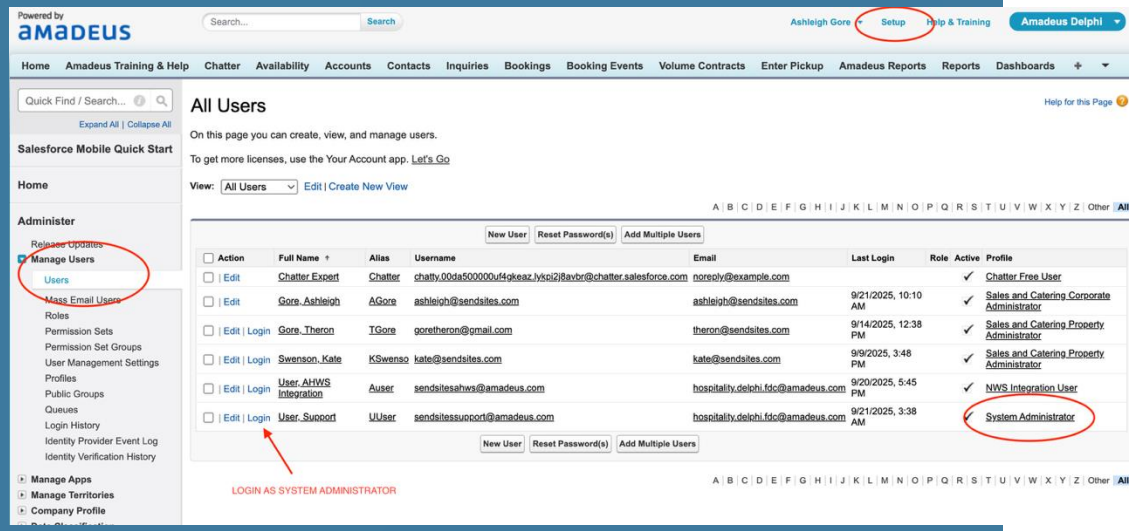

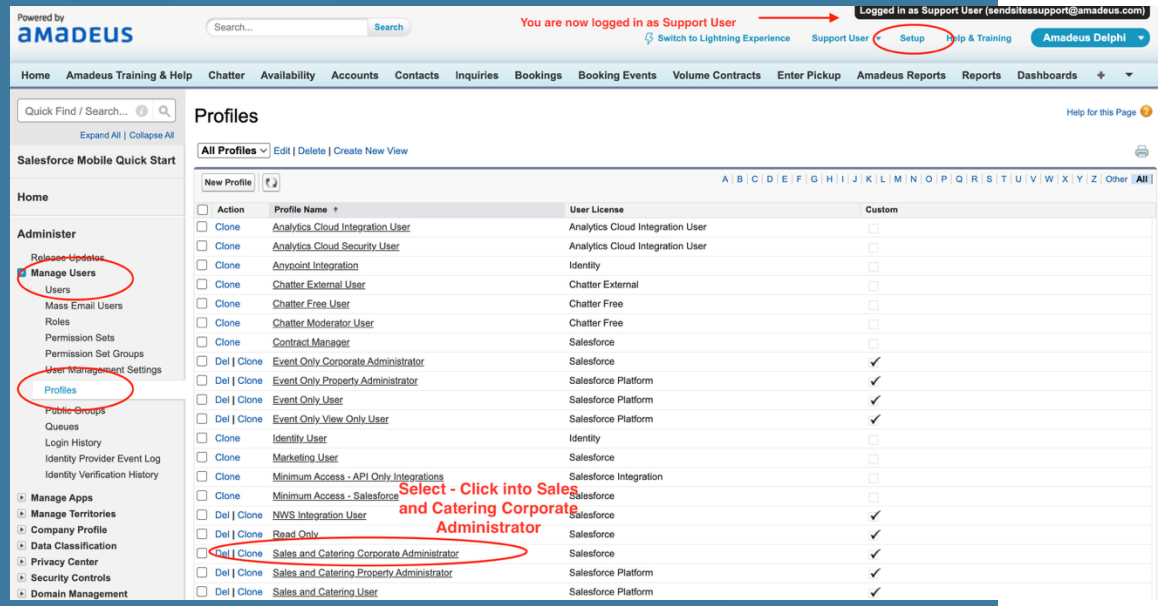

STEP 1

Log in as Your Salesforce System Administrator

WHY: You need to temporarily grant permissions and complete app installation, which requires admin-level access.

1. Log in to Salesforce.
2. Go to Setup (top-right).
3. Navigate to: Setup → Manage Users → Users
4. Locate the System Administrator user and click Log In next to their name.

STEP 2

Grant Temporary Permission

WHY: Salesforce restricts connected apps by default. This step enables the ability to approve a new connection (SendSites) temporarily.

1. Click into Setup
2. Manage Users → Profiles
3. Select the profile for your account: Sales & Catering **Corporate** Admin
4. Scroll down to System Permissions → Click Edit
5. Check the box: ✅ Approve Uninstalled Connected Apps
6. Click Save

SendSites

STEP 2 (...continued)

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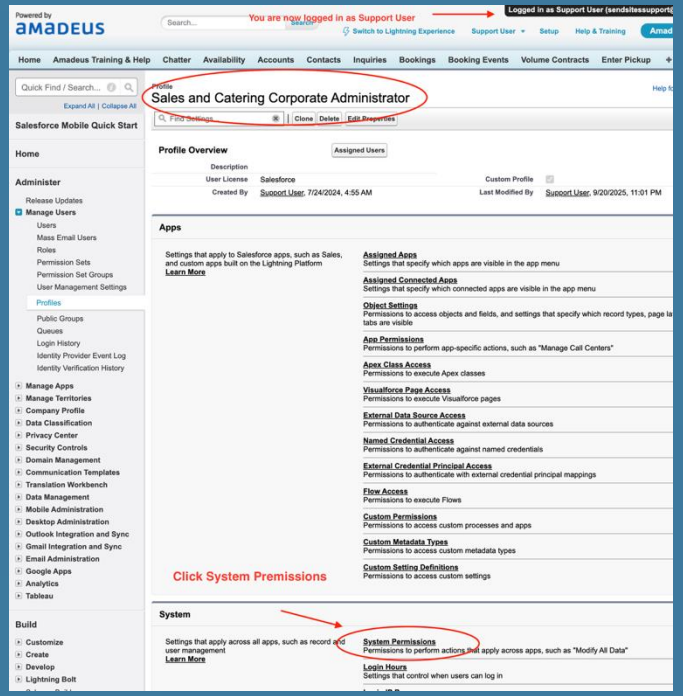

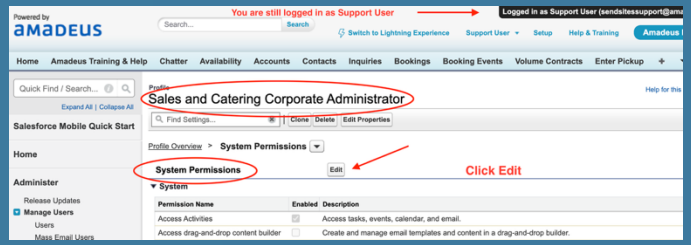

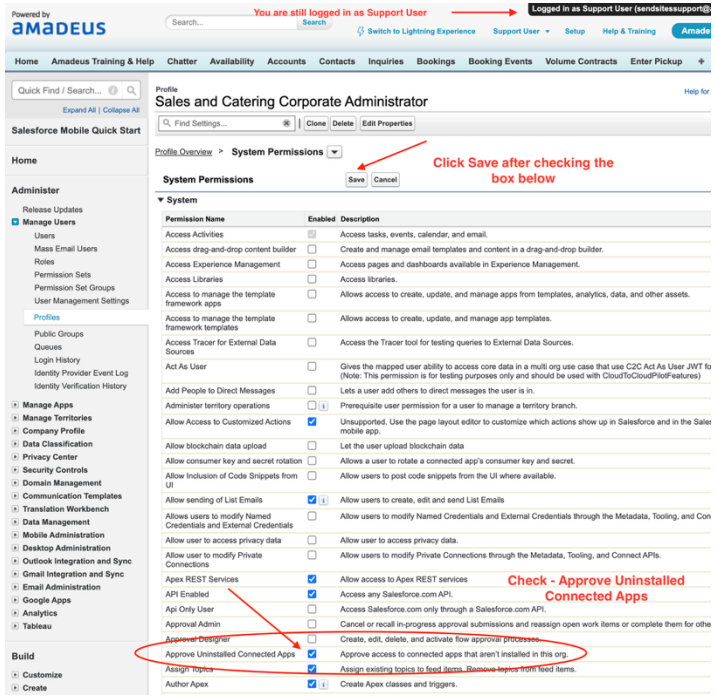

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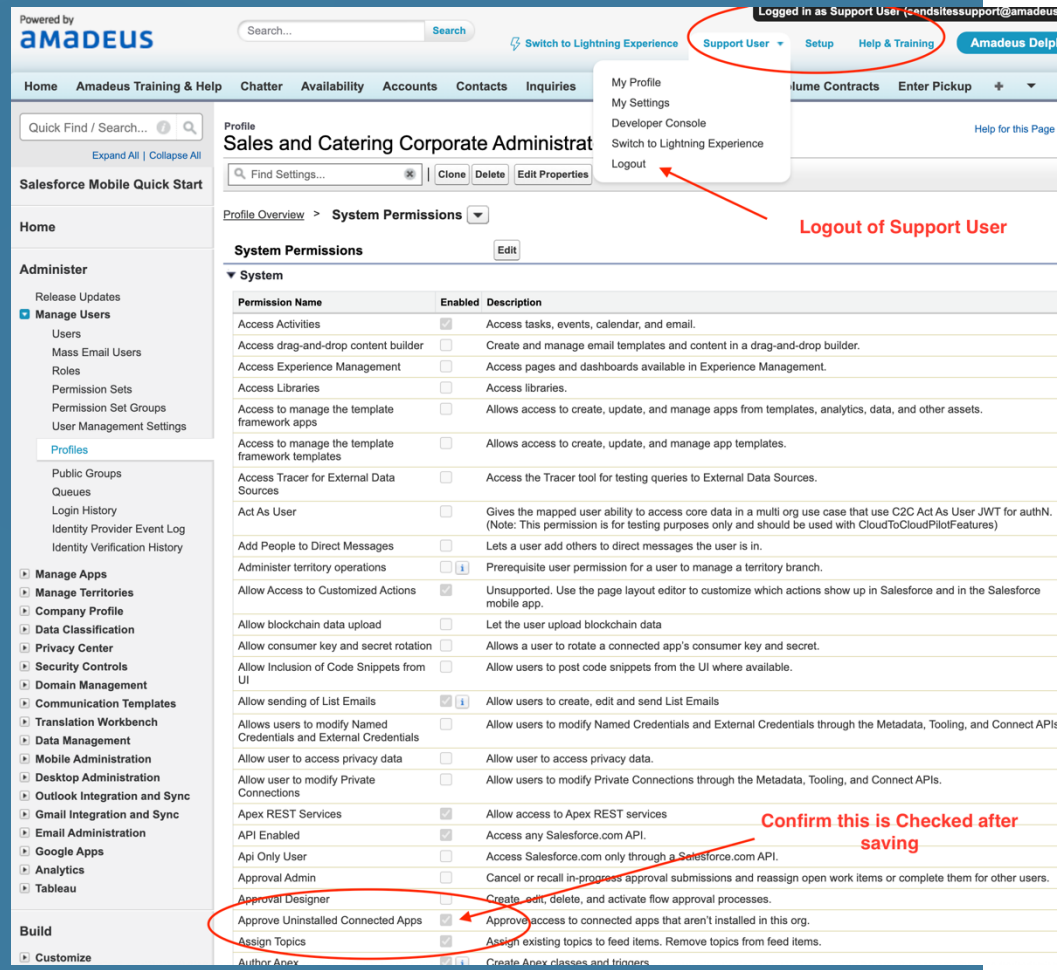


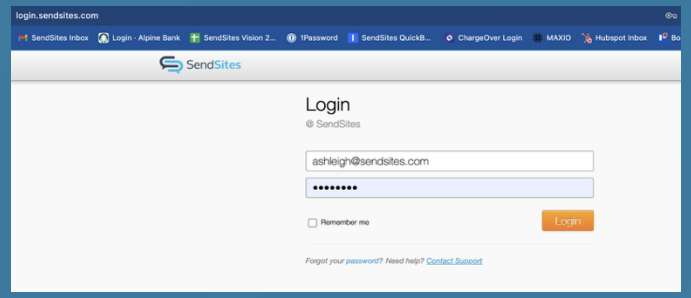
STEP 3

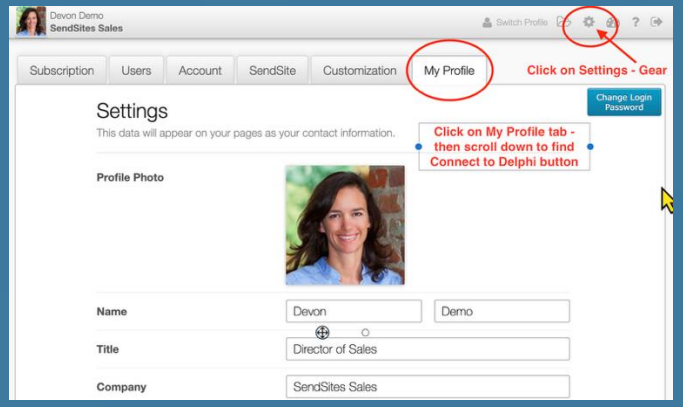
Log Out of the Support User

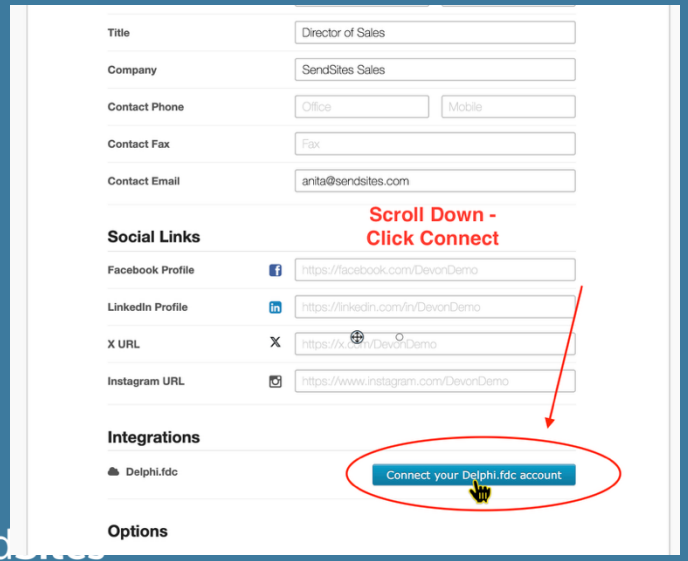
WHY: You now must connect the app as yourself.

1. Click Support User (top-right)
2. Choose Log Out

SendSites







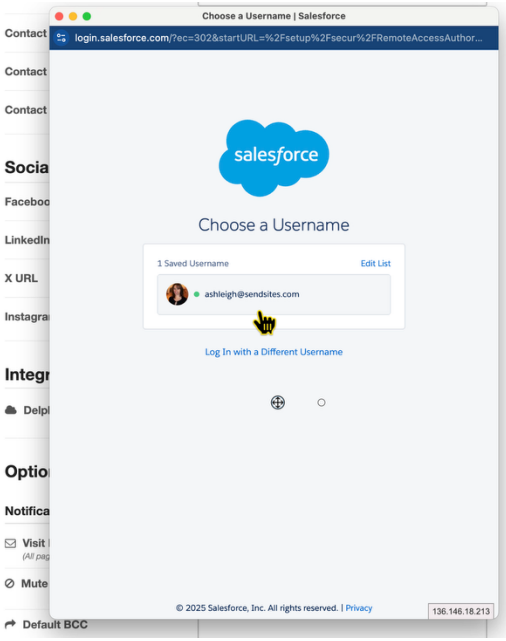
STEP 4

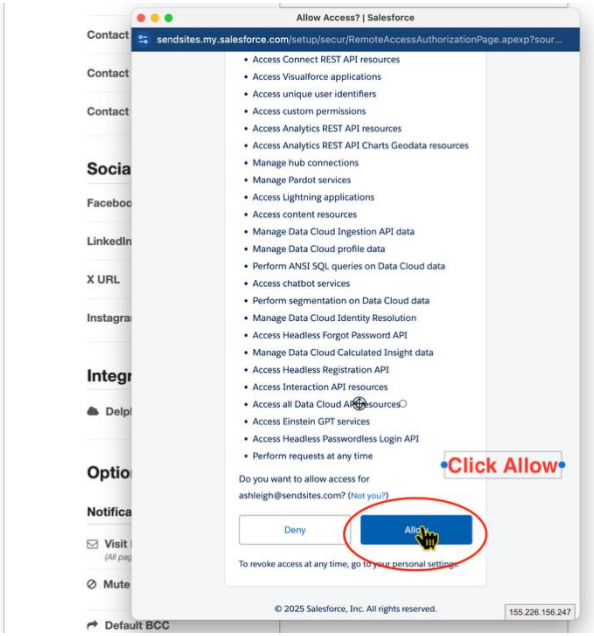
Connect Your SendSites Account

WHY: This securely links SendSites to your Salesforce user so proposals can access Delphi data.

This is a one-time connection for admin users only.

1. Log in to SendSites
2. Go to: Settings → My Profile
3. Scroll to Connect Your Delphi FDC Account
4. Choose your Salesforce username
5. Click Allow when prompted



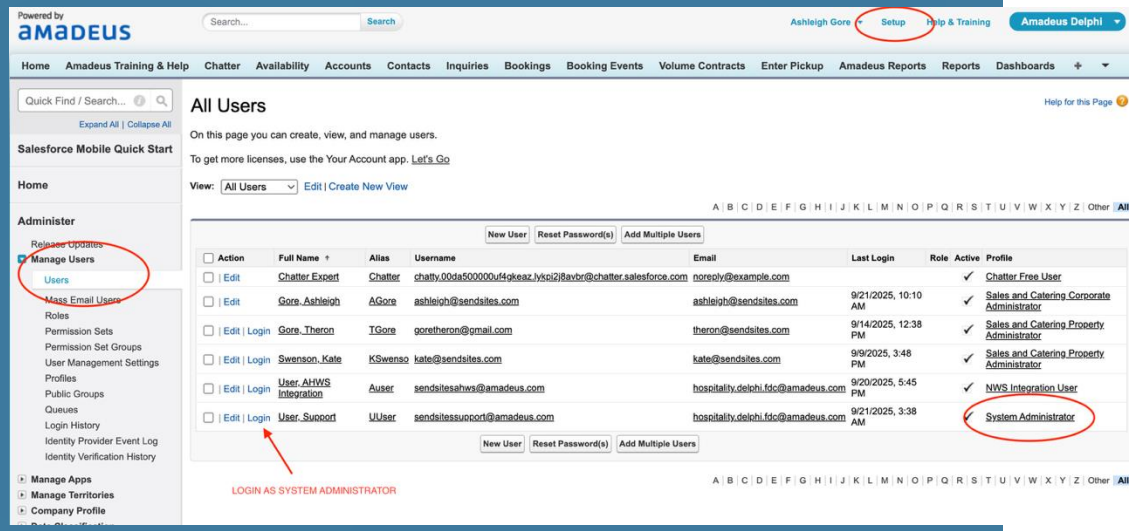


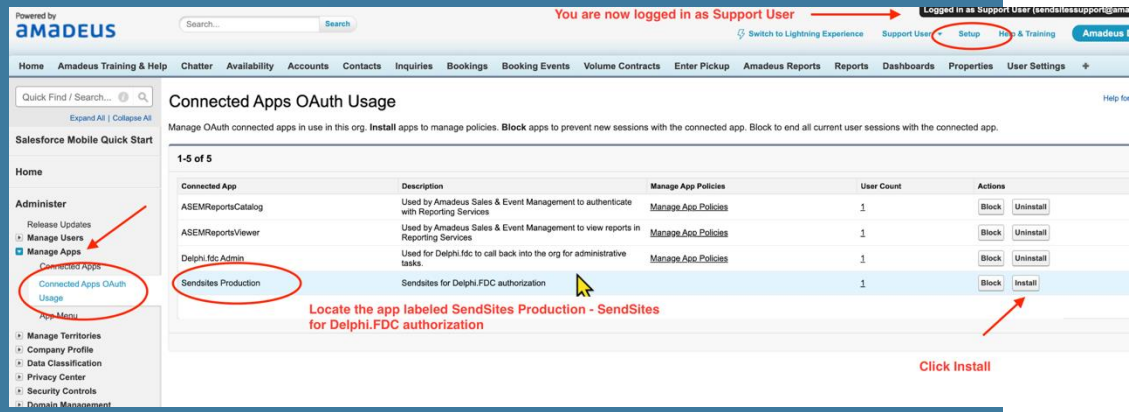
STEP 5

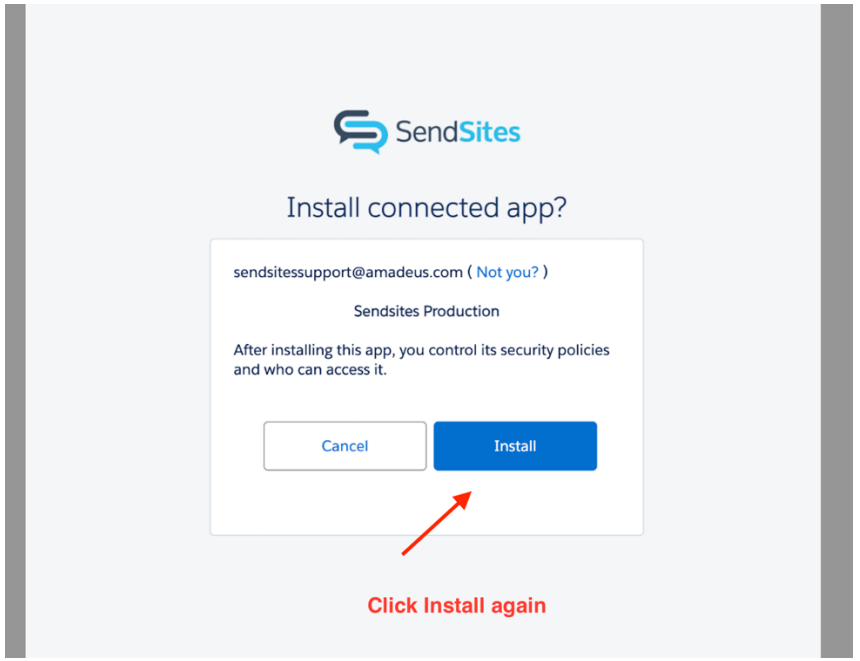
Install the Connected App in Salesforce

WHY: This completes the app installation and prepares it for managed use across your team.

1. Go back to Salesforce and log in again as your System Administrator
2. Navigate to: Setup → Manage Apps → Connected Apps OAuth Usage
3. Locate the app labeled SendSites for Delphi FDC
4. Click Install and confirm







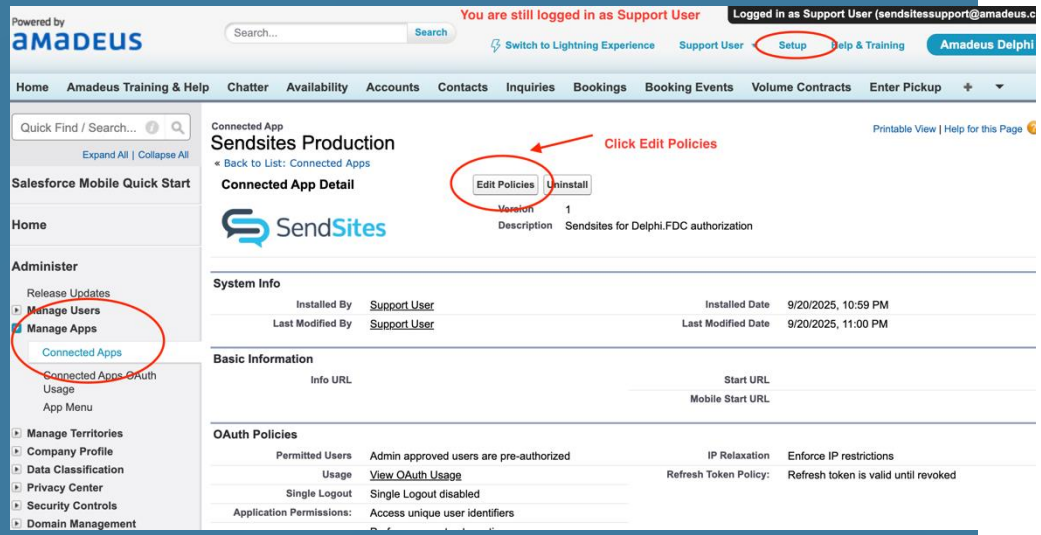
SendSites

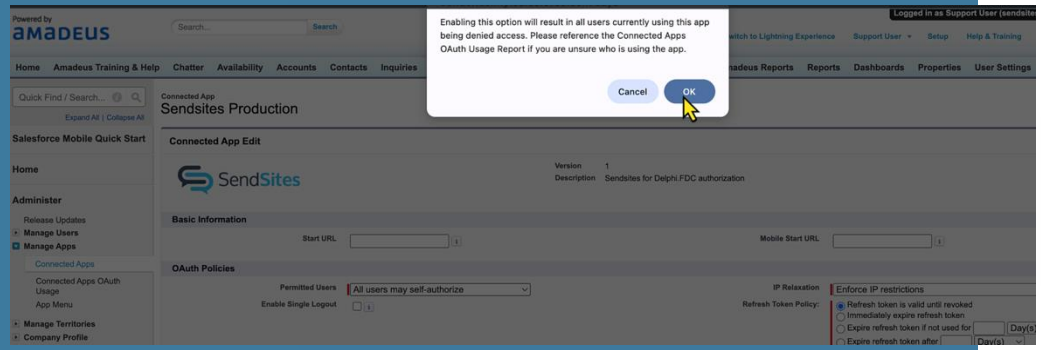
STEP 6

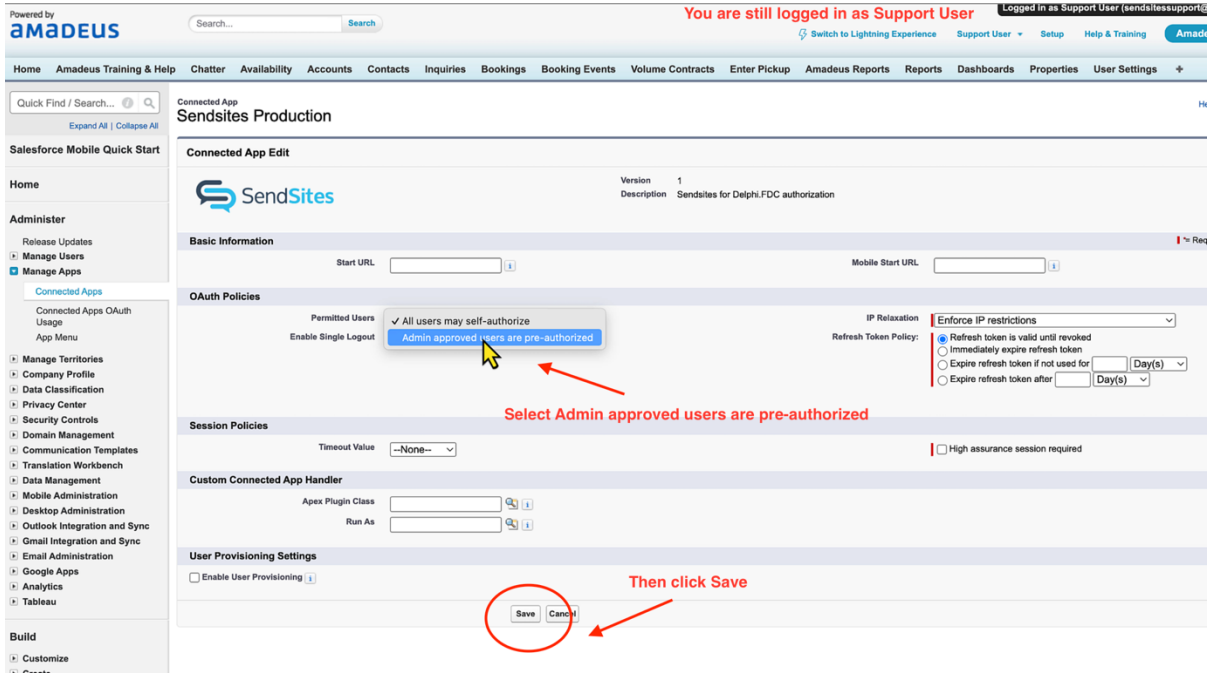
Update OAuth Policies

WHY: This ensures your users don't have to connect individually. You pre-approve them.

1. After installation, you will be on the SendSites Connect App page
2. Click Edit Policies
3. Change Permitted Users to: Admin approved users are pre-authorized
4. Click Save







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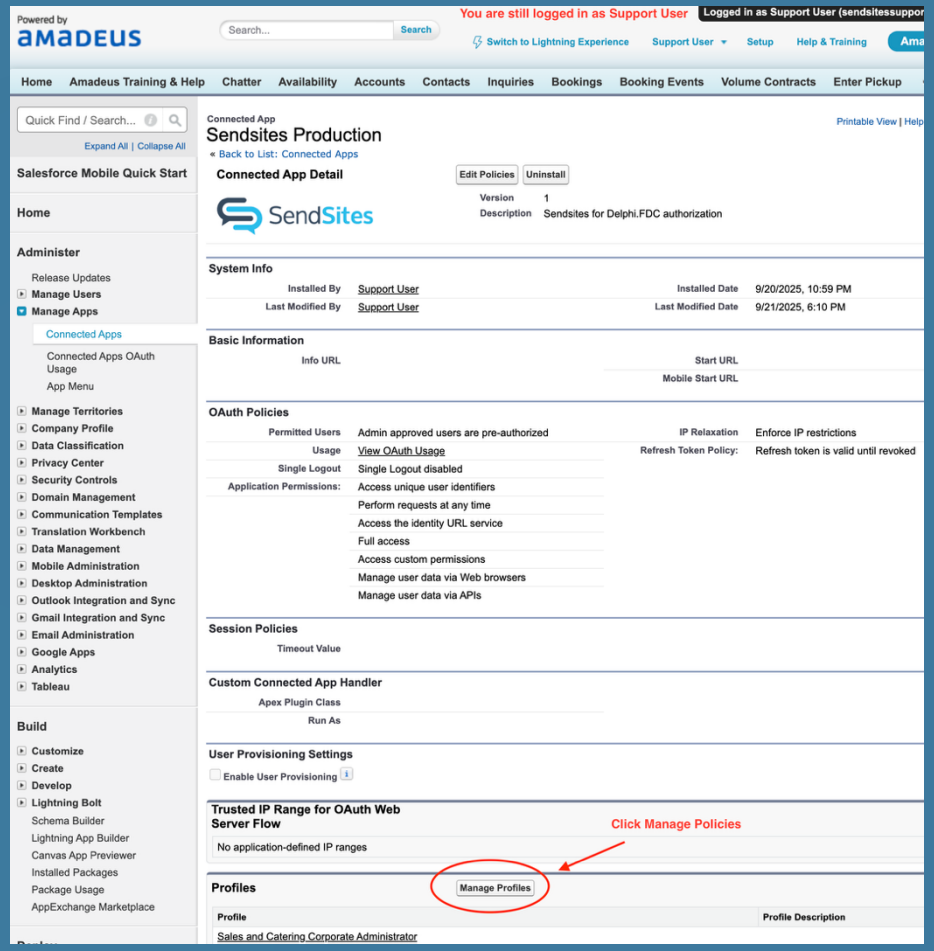
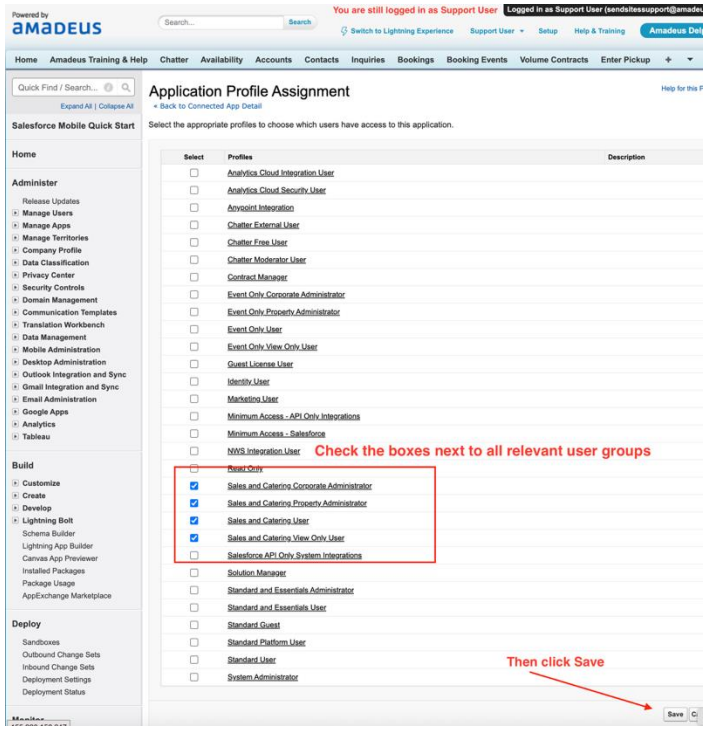


STEP 7

Pre-Authorize User Profiles

WHY: You are specifying which users (usually your sales and catering team) are allowed to use the connection.

1. On the same app settings page, scroll down to Profiles
2. Click Manage Profiles
3. Check the box next to all relevant user groups:
4. Sales and Catering Standard
5. Sales and Catering Admin (or equivalent)
6. Click Save



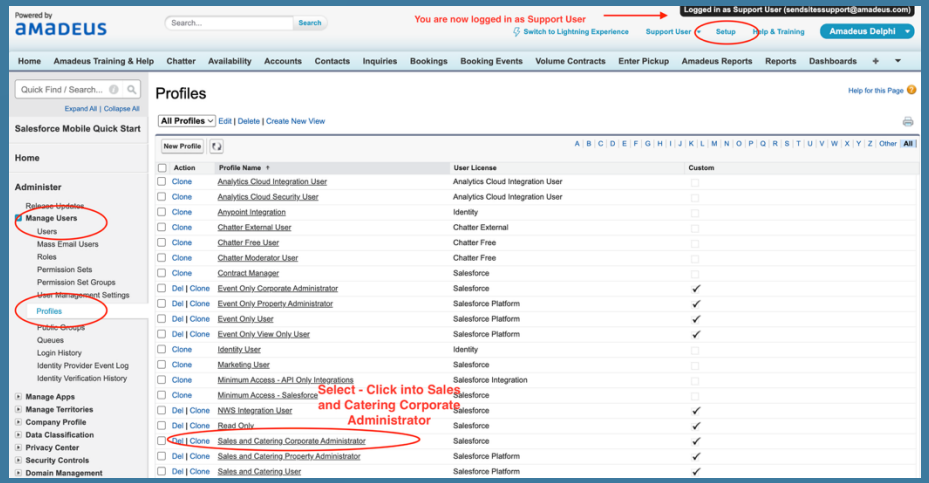
SendSites

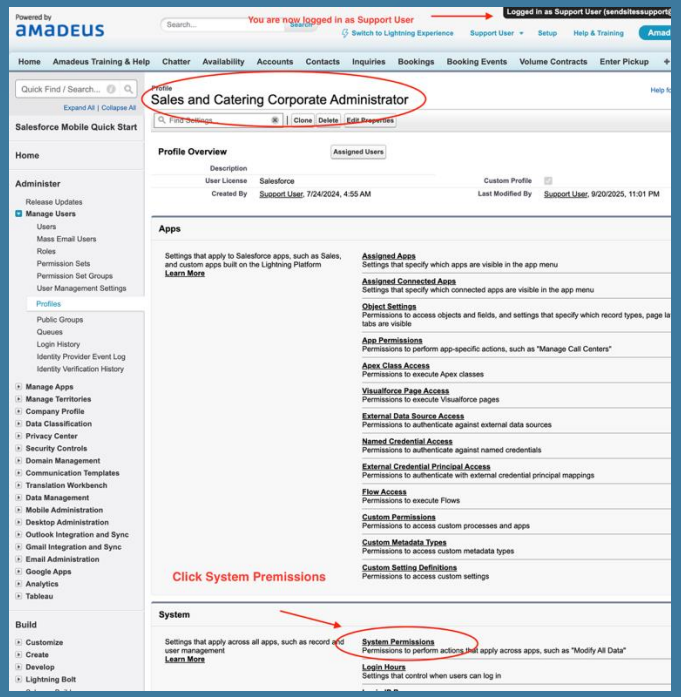
STEP 8

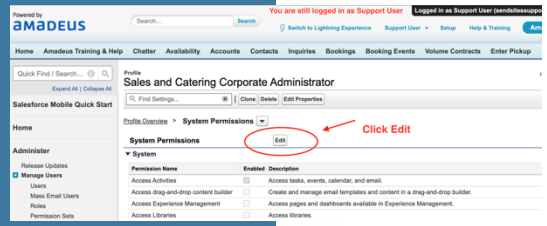
Remove Temporary Admin Permission

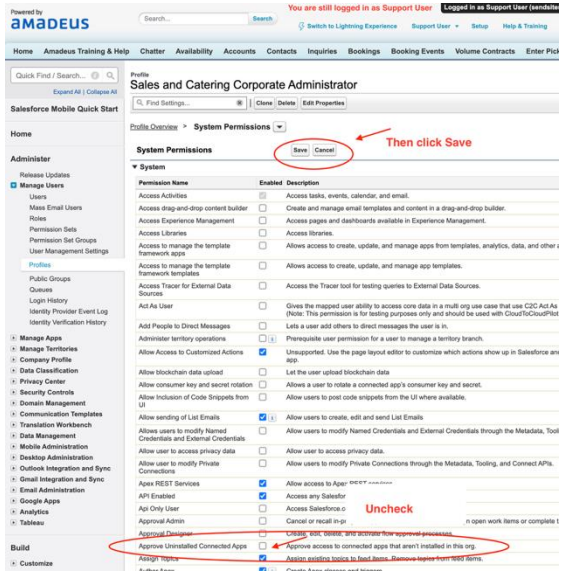
WHY: Best practice is to remove elevated privileges once setup is complete.

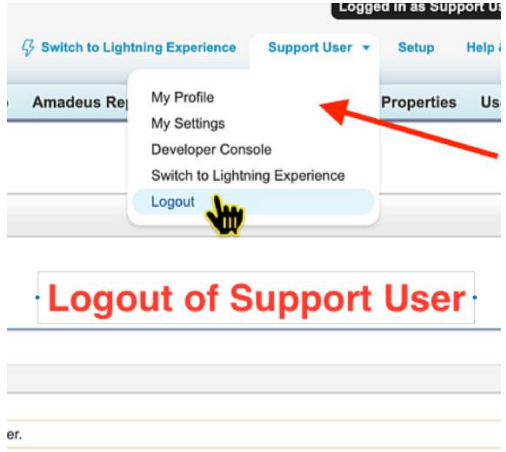
1. Back in Profiles, re-select your profile :Sales & Catering **Corporate** Administrator
2. Scroll to System Permissions – Select by clicking
3. Click Edit
4. Uncheck: ❌ Approve Uninstalled Connected Apps
5. Click Save
6. Logout of Support User











SendSites

YOU ARE DONE

SendSites is now connected to Amadeus Sales & Catering FDC | Salesforce

All authorized users can now generate dynamic, data-driven proposals using the integration.

No further setup is required.

Need help?

Contact SendSites Support

support@sendsites.com
+1 303 481-9929

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