

Backflpt for Salesforce

Installation and Administration Guide

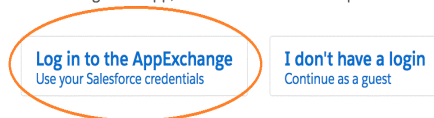
This document provides the installation and administrations steps for Salesforce Administrators on integrating Salesforce org with Backflpt application for its users.

Please contact our team support@backflipt.com, to know more about application installation and complete application functionality.

Step1: Get Backflpt for Salesforce from AppExchange

- i. Log in to AppExchange with you Salesforce credentials

To get this app, select one of the below options

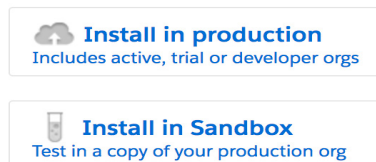


- ii. Search for "Backflpt for Salesforce " App.
- iii. Click the "Get It Now" button

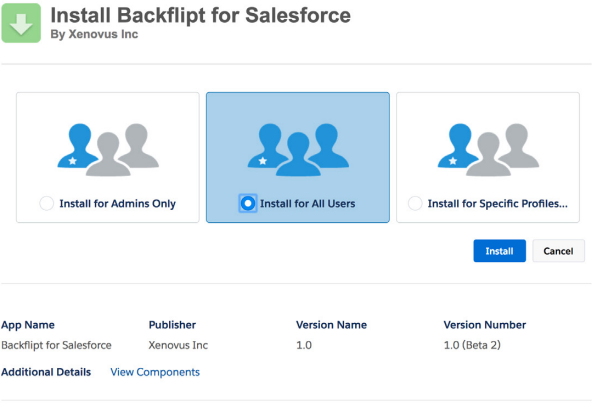
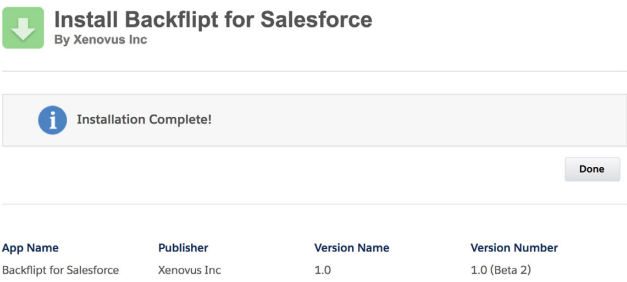


- iv. Choose the environment where the application will be installed

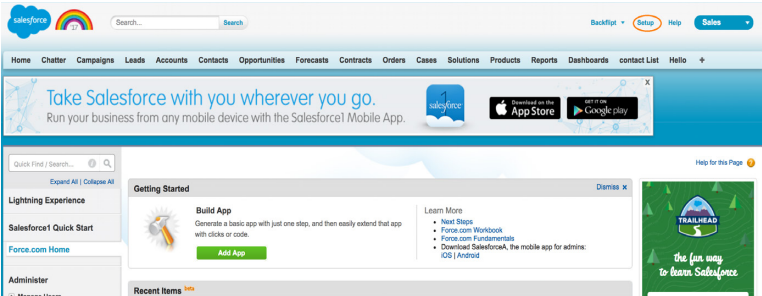
How would you like to continue?



Step2: Install “Backflpt for Salesforce” Managed Package

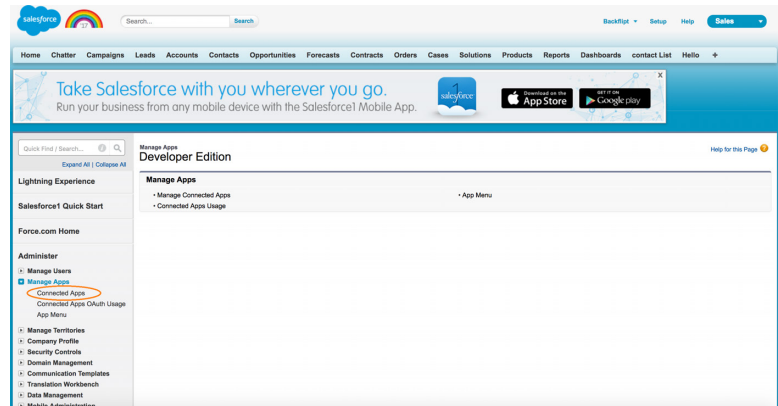
Select ‘Install for All Users’ Or ‘Install for Specific Profiles...’ Click ‘Install’	 <table border="1" data-bbox="737 646 1325 737"><thead><tr><th>App Name</th><th>Publisher</th><th>Version Name</th><th>Version Number</th></tr></thead><tbody><tr><td>Backflpt for Salesforce</td><td>Xenovus Inc</td><td>1.0</td><td>1.0 (Beta 2)</td></tr></tbody></table>	App Name	Publisher	Version Name	Version Number	Backflpt for Salesforce	Xenovus Inc	1.0	1.0 (Beta 2)
App Name	Publisher	Version Name	Version Number						
Backflpt for Salesforce	Xenovus Inc	1.0	1.0 (Beta 2)						
Click Done when you see ‘Installation Complete!’ appear	 <table border="1" data-bbox="737 1108 1360 1157"><thead><tr><th>App Name</th><th>Publisher</th><th>Version Name</th><th>Version Number</th></tr></thead><tbody><tr><td>Backflpt for Salesforce</td><td>Xenovus Inc</td><td>1.0</td><td>1.0 (Beta 2)</td></tr></tbody></table>	App Name	Publisher	Version Name	Version Number	Backflpt for Salesforce	Xenovus Inc	1.0	1.0 (Beta 2)
App Name	Publisher	Version Name	Version Number						
Backflpt for Salesforce	Xenovus Inc	1.0	1.0 (Beta 2)						

Step 3: Configure Backflpt for Salesforce permission to users

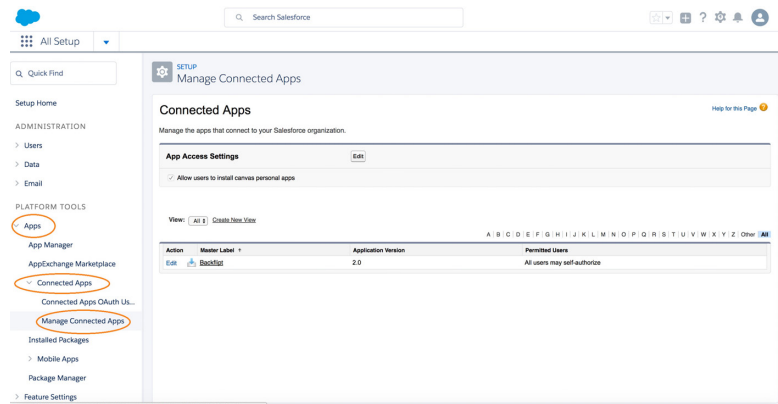
Log in to Salesforce then select ‘Setup’	
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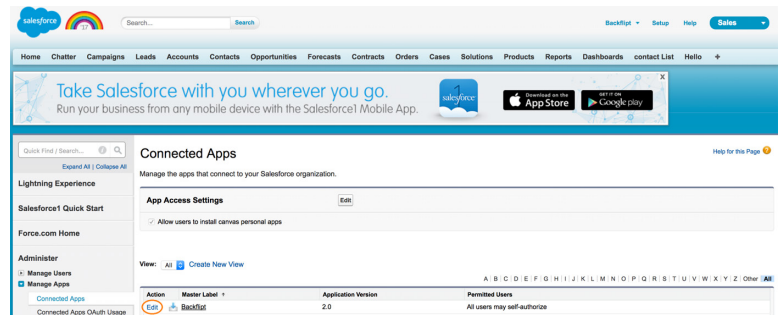
Select Connected Apps:
In *Salesforce Classic*, select **'Manage Apps > Connected Apps'** from the side navigation panel.



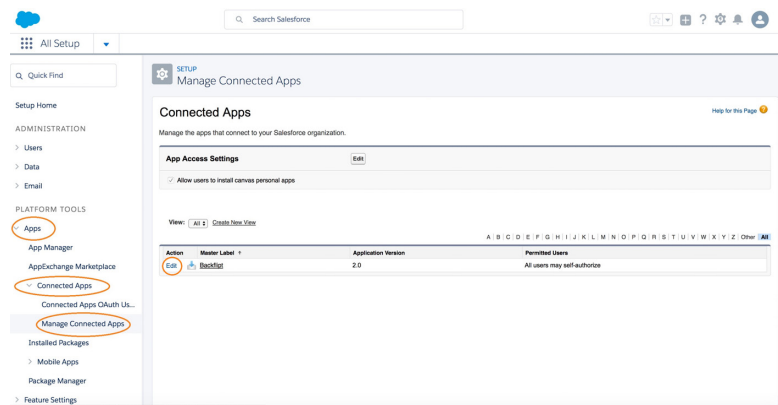
In *Lightning Experience*, select **'Setup > Apps > Connected Apps > Manage Connected Apps'**



In *Salesforce Classic*,
Select **'Edit'** for **'Backflip'** Connected app



In *Lightning experience* **'Edit'** for **'Backflip'** Connected app



In *Salesforce Classic*,
Select '**Admin approved users are pre-authorized**' option for Permitted users and '**Save**'.

In *Lightning Experience*,
Select '**Admin approved users are pre-authorized**' option for Permitted users and '**Save**'.

Select '**Manage Users > Profiles**'

'**Edit**' profile which requires connected app access

Action	Profile Name	User License	Custom
Edit	Customer Community Plus Login User	Customer Community Plus Login	☐
Edit	Customer Community Plus User	Customer Community Plus	☐
Edit	Customer Community User	Customer Community	☐
Edit	High Volume Customer Portal User	High Volume Customer Portal	☐
Edit	Marketing User	Salesforce	☐
Edit	Partner Community Login User	Partner Community Login	☐
Edit	Partner Community User	Partner Community	☐
Edit	Read Only	Salesforce	☐
Edit	Solution Manager	Salesforce	☐
Edit	Standard Platform User	Salesforce Platform	☐
Edit	Standard User	Salesforce	☐
Edit	System Administrator	Salesforce	☐
Edit	System Administrator	Salesforce	☐



In Lightning Experience Select
'Users > Profiles'

'Edit' profile which requires
connected app access

Salesforce Classic: Select **'Backflipit'**
connected app and **'Save'**

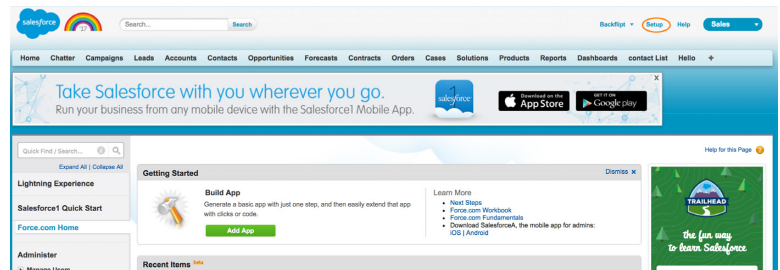
In Lightning experience: Select
'Backflipit' connected app and
'Save'

Step 4: Add Backflipit to your Salesforce page layouts

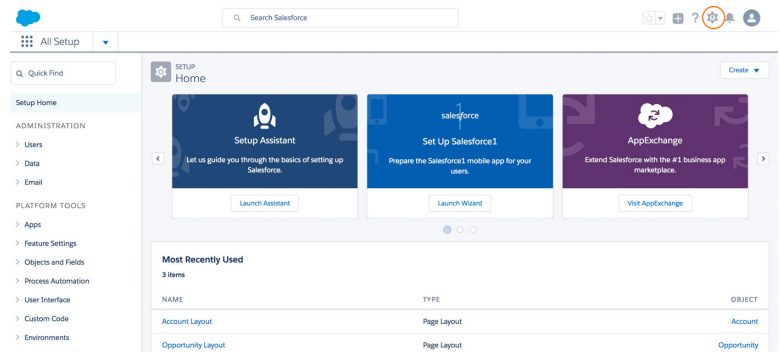
Backflipit is connected to Salesforce. Add Backflipit application to the page layouts of Accounts, Opportunities and Leads to show contextual information.



Select '**Setup**' in Salesforce Classic



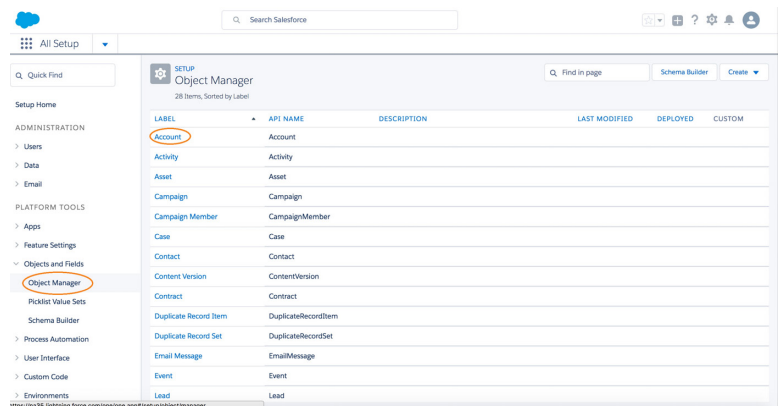
Select '**Setup**' in Lightning experience

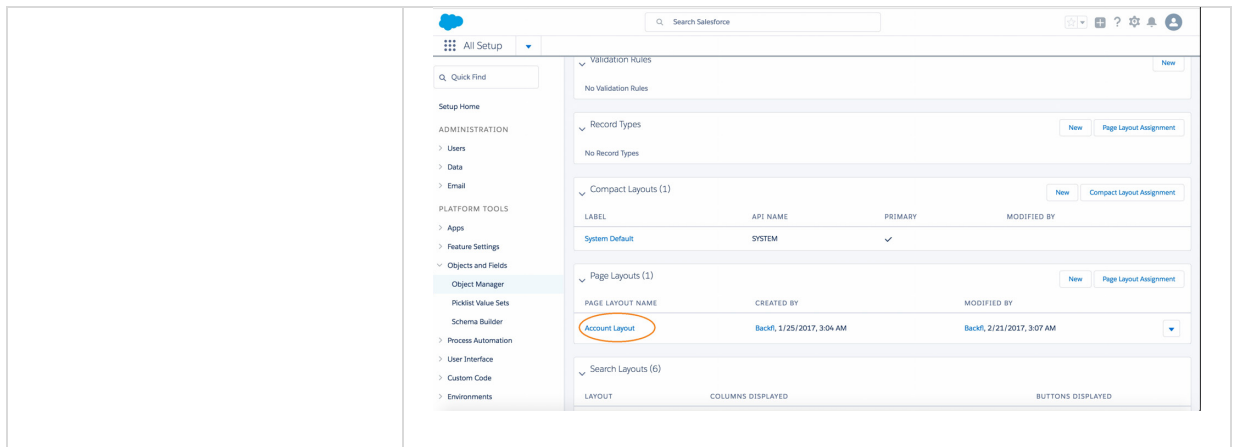


Select '**Page Layout**':
In *Salesforce Classic*, select '**Build > Customize > Accounts > Page Layout**' from the side navigation panel.

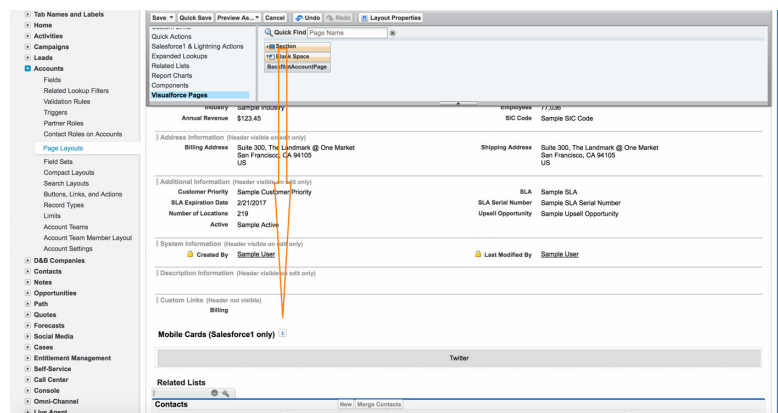


In *Lightning Experience*, select '**Setup > Object Manager**' from the side navigation panel, select '**Account**', then click '**Page Layouts**'.

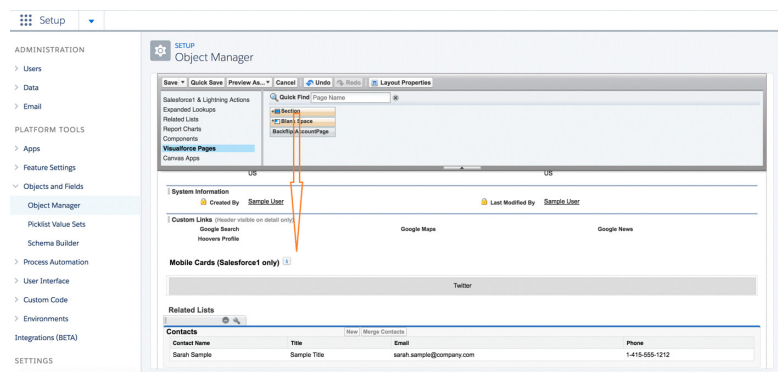




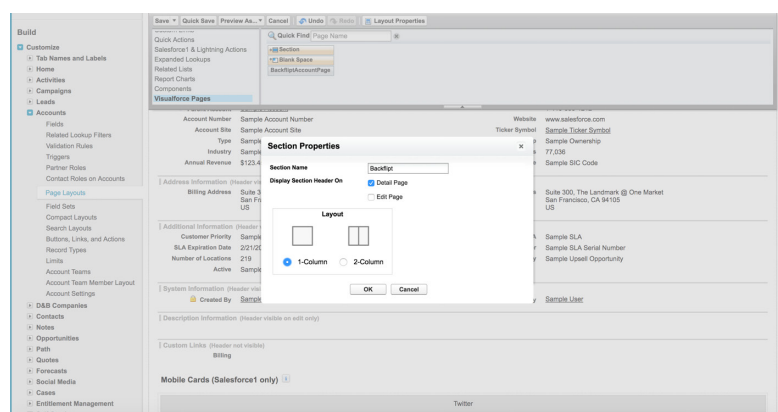
In *Salesforce Classic*
Select '**Visualforce Pages**', then
drag and drop '**Section**' below the
'**Custom Links**' section



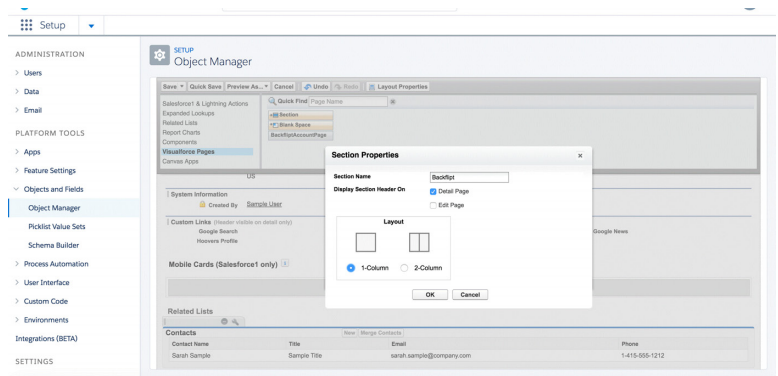
In *Lightning Experience*
Select '**Visualforce Pages**', then
drag and drop '**Section**' below the
'**Custom Links**' section



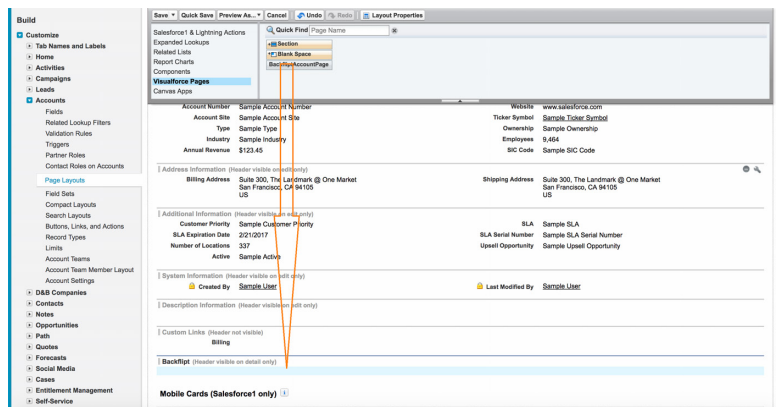
In *Salesforce Classic*
Name the section '**Backflip**'
Select '**Detail Page**'
Deselect '**Edit Page**'
Select '**1-column layout**'
Click '**OK**'



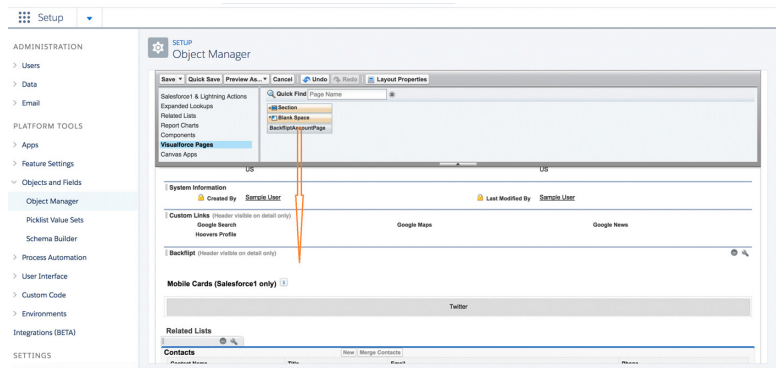
In *Lightning Experience*
Name the section '**Backflpt**'
Select '**Detail Page**'
Deselect '**Edit Page**'
Select '**1-column layout**'
Click '**OK**'



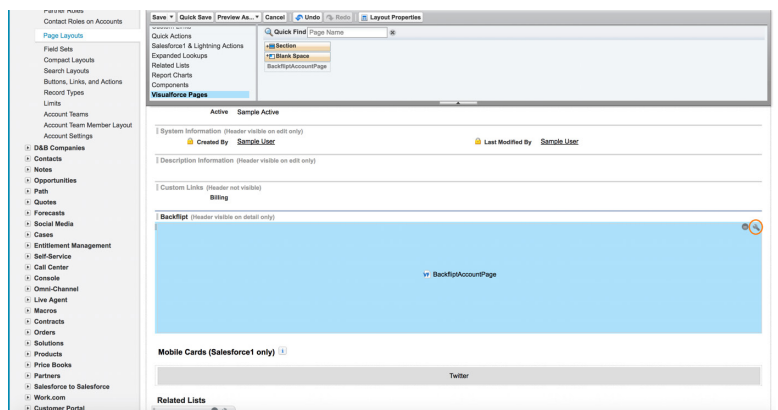
In *Salesforce Classic*
Select '**BackflptAccountPage**' drag and drop in '**Backflpt**' section



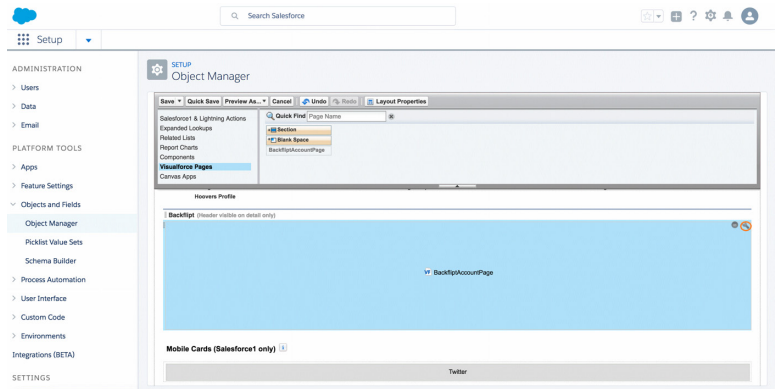
In *Lightning Experience*
Select '**BackflptAccountPage**' drag and drop in '**Backflpt**' section



In *Salesforce Classic*
Edit Visualforce page properties by clicking the wrench button.

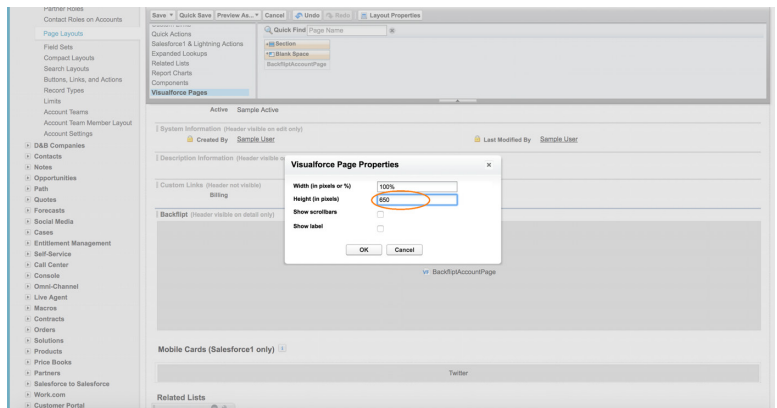


In *Lightning Experience*
Edit Visualforce page properties by
clicking the wrench button.

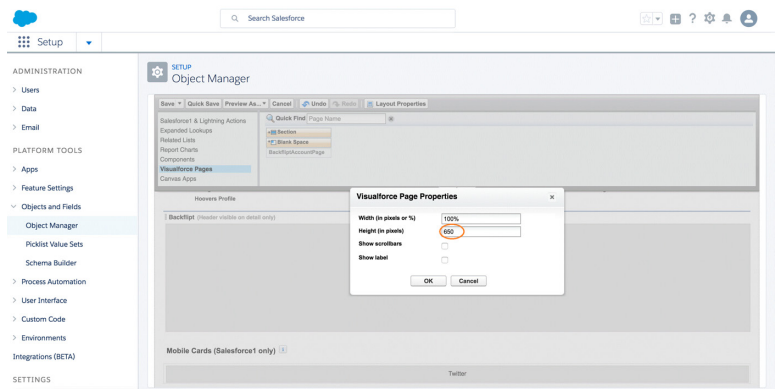


In *Salesforce Classic*
Change the Visualforce page
properties to the recommended
settings:

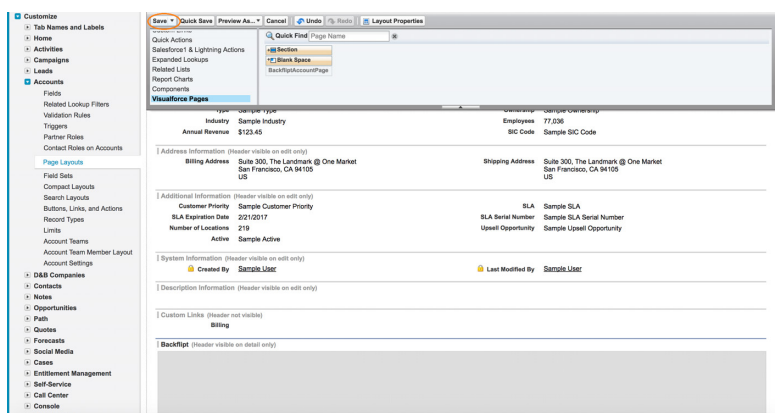
Width: **100%**
Height: **650**



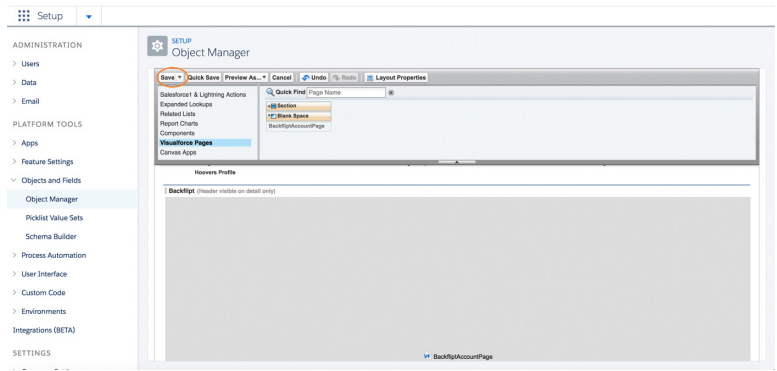
In *Lightning Experience*
Change the Visualforce page
properties to the recommended
settings:
Width: **100%**
Height: **650**



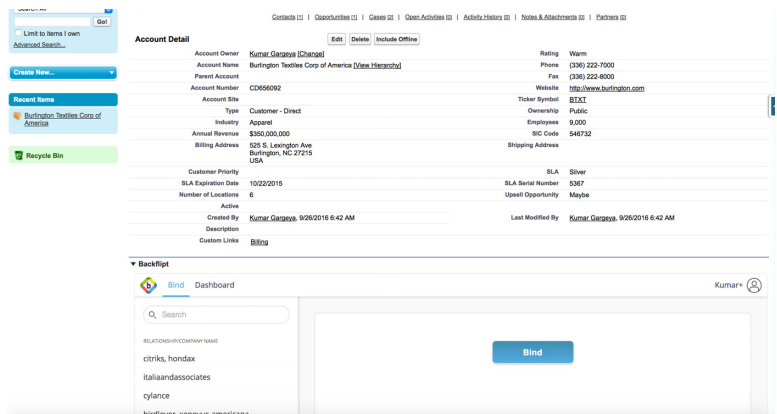
In *Salesforce Classic*
Click '**Save**' to save the layout
changes



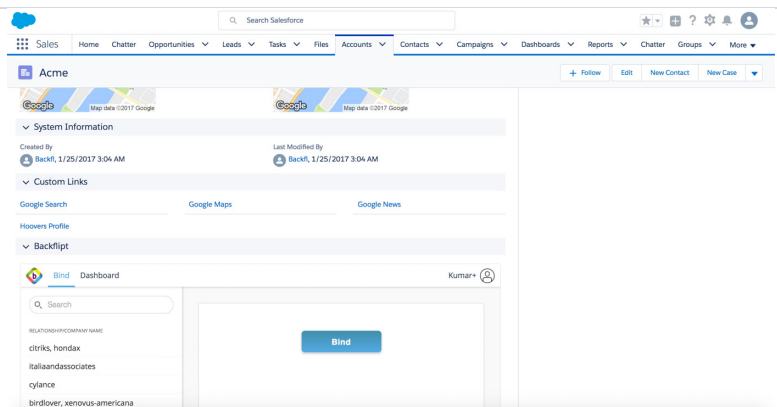
In *Lightning Experience*
Click **'Save'** to save the layout changes



Check your integration:
In *Salesforce Classic* ,
● Select Account tab
● Scroll down to verify that the
'Backflip' section has been added



In *Lightning Experience* ,Go to the
'Accounts'.
Select **'Details'** tab of a record.
Scroll down to verify **'Backflip'**
Section



Repeat the above to add Backflip to "Opportunities" and "Lead" page layouts.

