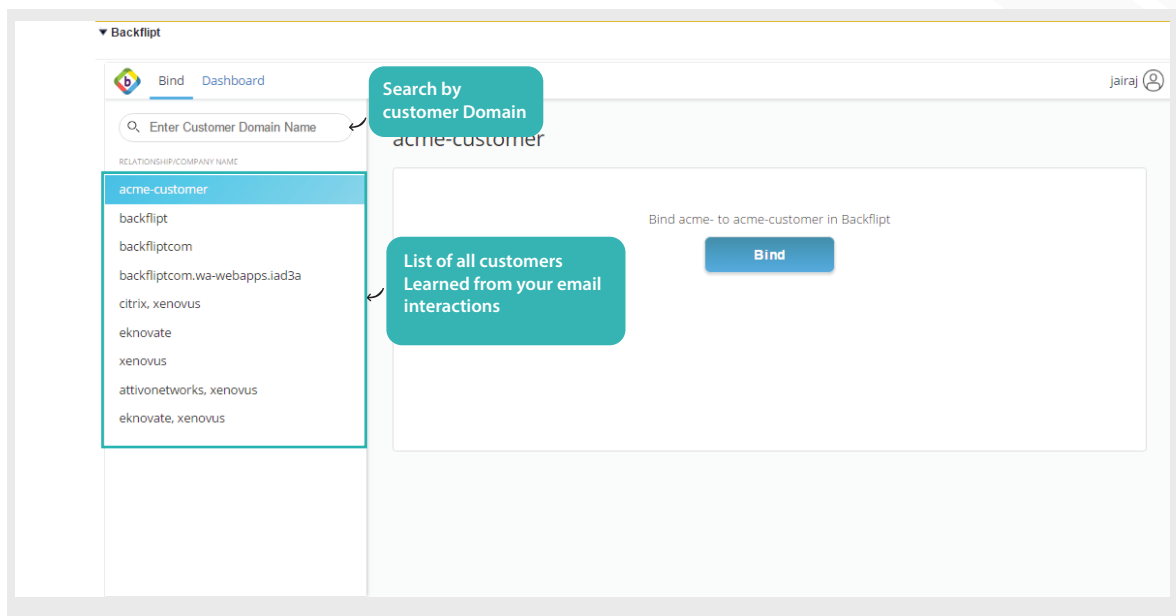
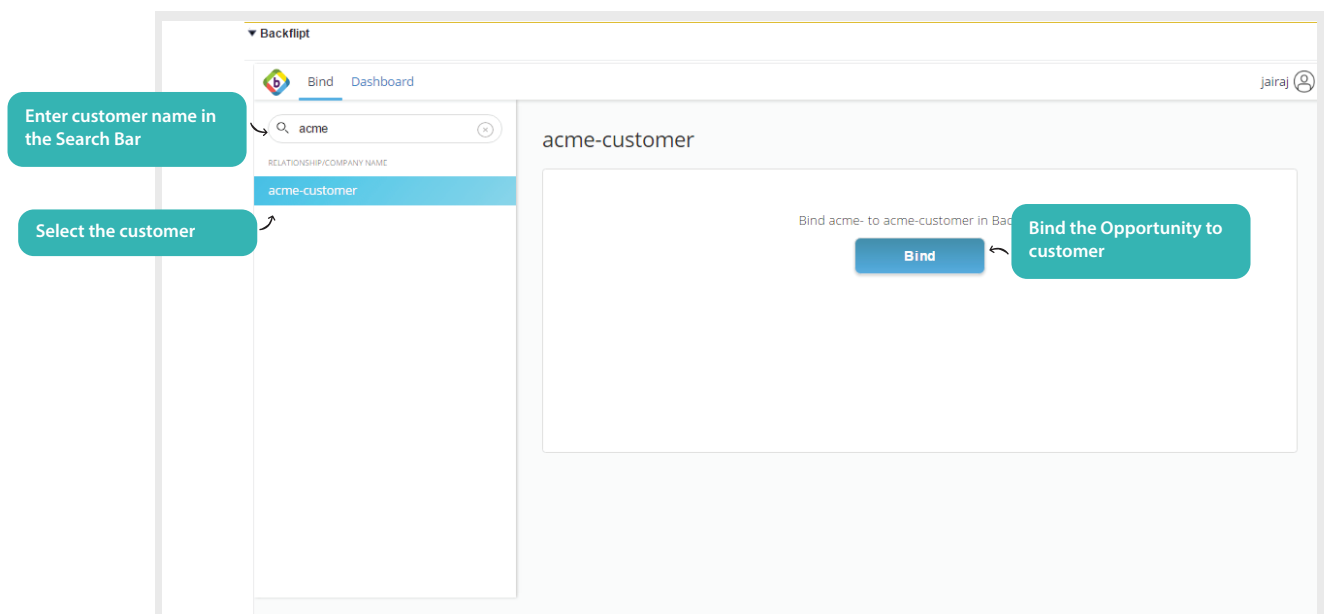


Backflpt - Salesforce Quick Start Guide

Backflpt Panel



Binding the Salesforce Record to a Customer



Backflpt Panel Details

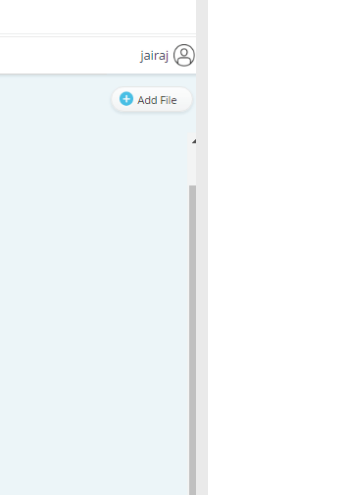
Annotations:

- List of emails with the customer:** Points to the 'CONVERSATION NAME' list on the left.
- Details of Email Thread selected in the left panel:** Points to the 'Suggestion Test.1' conversation entry.
- Details of Team Discussions:** Points to the 'Team View' panel showing team members and messages.
- Click on "Add File" to add a document in Team View:** Points to the 'Add File' button in the top right.
- Type here to send email to customer:** Points to the input field at the bottom of the 'Customer View' panel.
- Type here to chat with team members:** Points to the input field at the bottom of the 'Team View' panel.

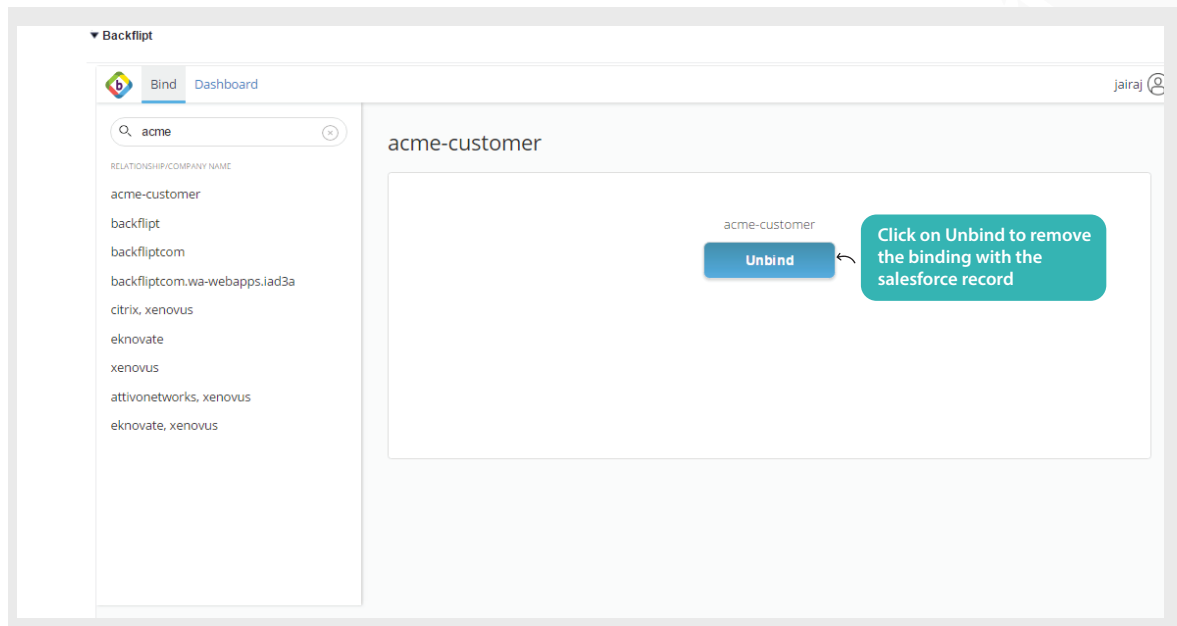
Backflpt Panel Details 2

Annotations:

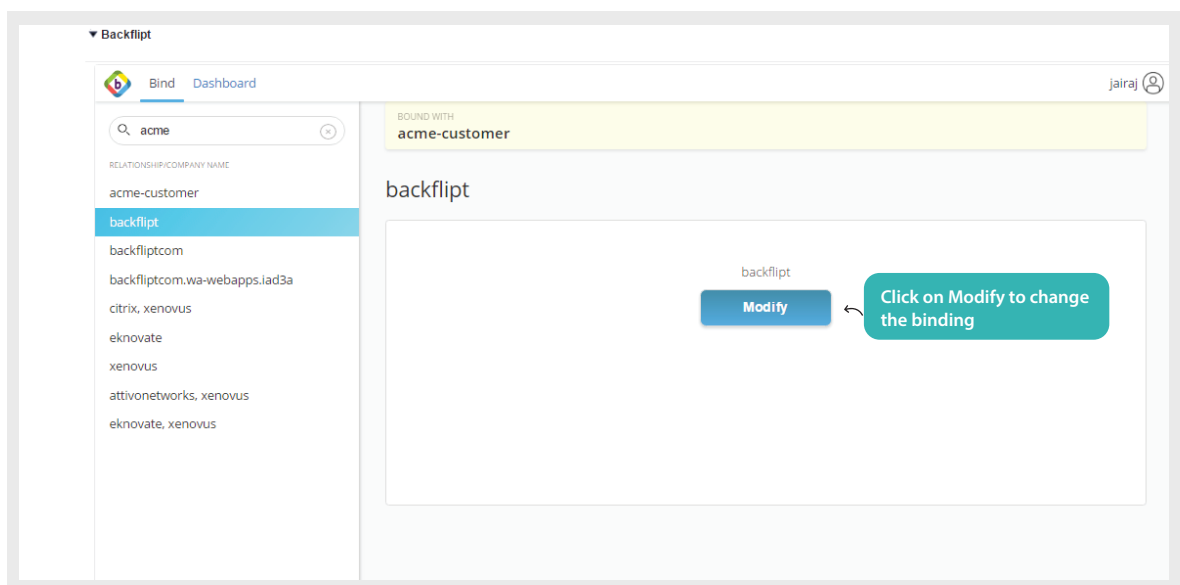
- Click here to Add colleagues in team view:** Points to the 'Add' button in the 'Team View' panel.
- Select apps and integrations option to add a cloud storage:** Points to the 'Apps & Integrations' link in the top right user menu.



Unbind a Relationship



Modify a Relationship



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