What is the HOC Flex Configuration?

As of March, 2018 - HandsOn Connect is available in two configurations.

All existing customers are in what is now referred to as the **HOC Standard Configuration.**

As of March, 2018 - some new customers are receiving HandsOn Connect in the new **HOC Flex Configuration.** The Flex Configuration makes it possible for organizations using Salesforce with multiple record types for accounts and contacts to more flexibly use HandsOn Connect to meet their business requirements, while not interfering with their current business practices.

This article will describe the principal differences between the Standard and new Flex Configuration.

What are characteristics of the HOC Standard Configuration?

The following behaviors in Salesforce are the norms of the HOC standard configuration:

- Organizations who register via the public site are given the organization record type "Nonprofit"
- Contacts who register via the public site are given the contact record type "Volunteer"
- Contacts can only be granted partner staff access to organizations that meet the following requirements

1. The organization must be of record type 'nonprofit'

2. The organization must have a primary contact associated to it.

3. The organization must be in status = active partner.

- Partner Staff Access is initially granted to a contact by using the Contact record's "Contact Overview" as described in this article.

What are characteristics of the HOC Flex Configuration?

In the Flex Configuration, HandsOn Connect permits the following:

1. A contact can be granted partner staff access to create and manage volunteer opportunities for organizations of any record type. (This is useful if you are going to have business accounts posting volunteer opportunities, or in the higher education market, academic

departments, sports teams and other organizational record types may be posting and managing volunteer opportunities.

2. Partner Staff Access is not granted via the Contact record's "Contact Overview" component. Partner staff access is granted and managed through Account Contact Relationships. [See this article for a description of how to grant partner staff access in the Flex Configuration](#)

There are also additional options that can be configured when HOC is in the Flex Configuration. These can be set as part of a client's flex configuration upon request if they meet a specific business need.

1. Do not create contacts with record type = volunteer.   (This option is useful if, for example, your volunteers are going to be students and you have already defined a 'student' record type for contacts.

2. Do not create organizations with record type - nonprofit.   If your partner organizations are going to be something other than nonprofits -- the flex configuration can be set up to use a different default organization record type.

3. Do not require a primary contact for an organization in order to grant a contact access to manage that organization. (This setting also makes it possible to no longer require a Primary Contact on the organization registration form.

4. Do not require an organization to have the status "Active Partner" in order to grant a contact access to manage it.

⚡ The purpose of the HOC Flex Configuration is to provide greater flexibility to organizations using Salesforce for more than just Volunteer Management. The Flex Configuration, for example:

• Makes it possible for an organization using the NonProfit Success Pack, to remain entirely in the household model, as it removes the requirement that a contact must have a direct relationship with a nonprofit account.

• Makes it possible for organizations using Salesforce's HEDA application, to manage volunteers across a variety of academic organization types.

   If you are an existing HOC customer who has a need to to be moved to the new Flex Configuration beta -- please open a help center ticket and let us know.