Granting Partner Staff Access to Contact (HOC Flex Configuration)

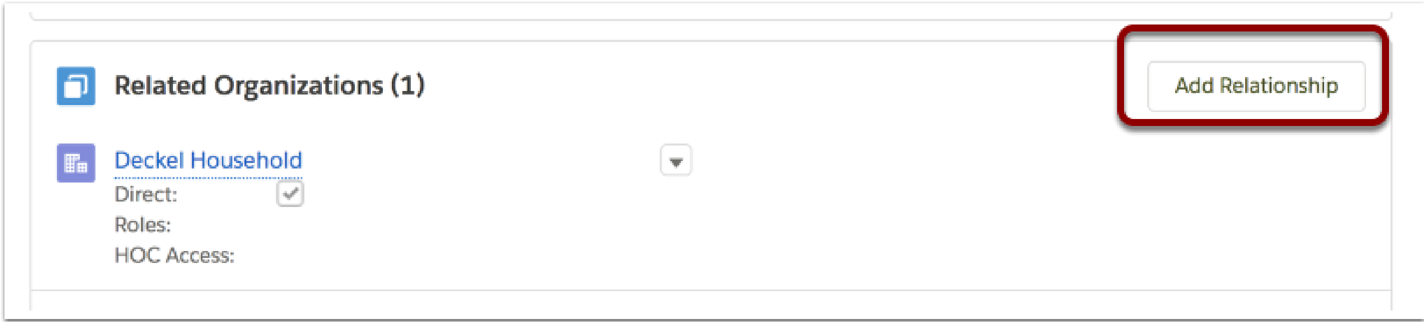
In The HOC Flex Configuration Partner Staff Access is granted in a different manner than the HOC Standard Configuration.

In HOC Flex Configuration - any contact can be granted partner staff access for any organization. This means a single contact can be granted "Partner Staff" sharing portal access to multiple organizations.

This article show how Partner Staff Access is granted in Salesforce's Lightning environment. The process remains the same if you're using Salesforce Classic - but the page layouts will look different than the illustrations in this article.

Partner Staff Access is granted via the Account Contact Relationship object

1) Go to a Contact record and look for the related list "Related Organizations". Click on "Add Relationship"

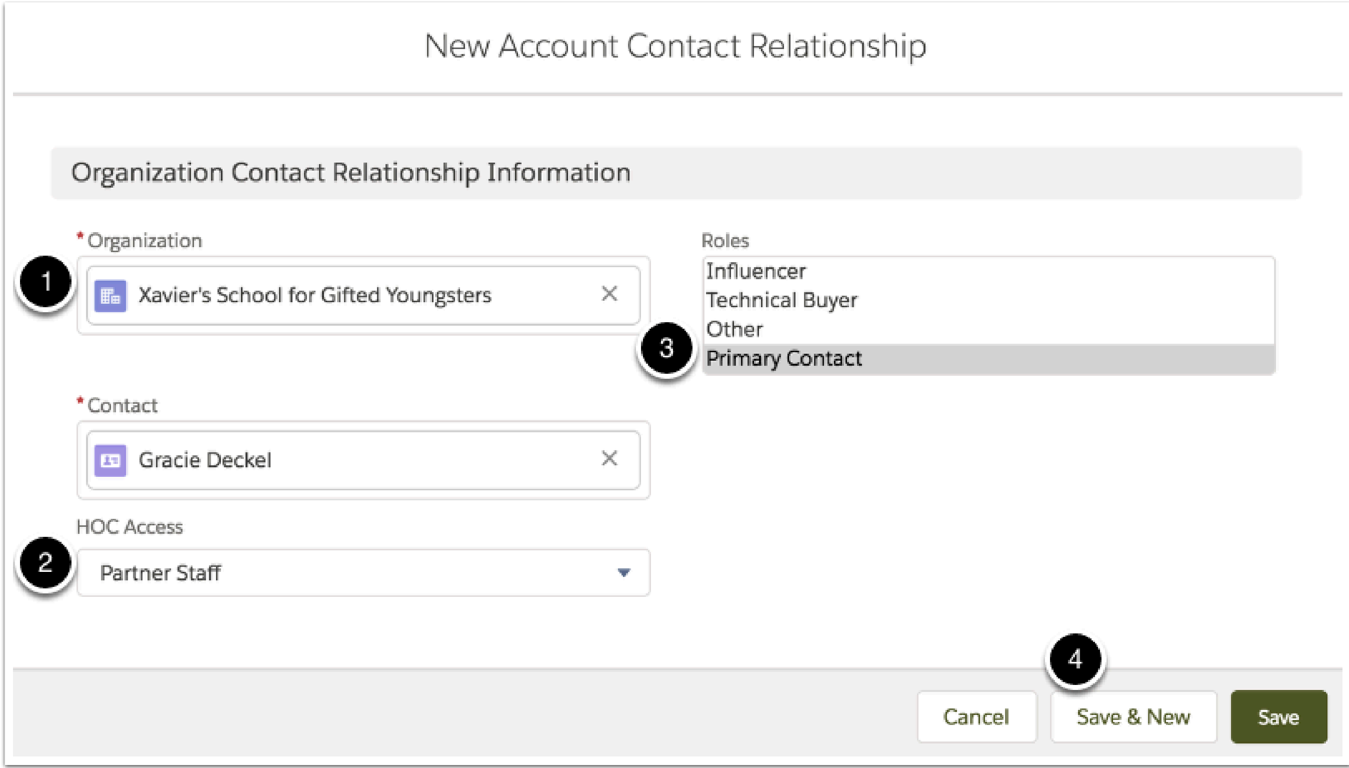


If in your instance of Salesforce Accounts hasn't been renamed to Organizations -- the related list may be called "Related Accounts"

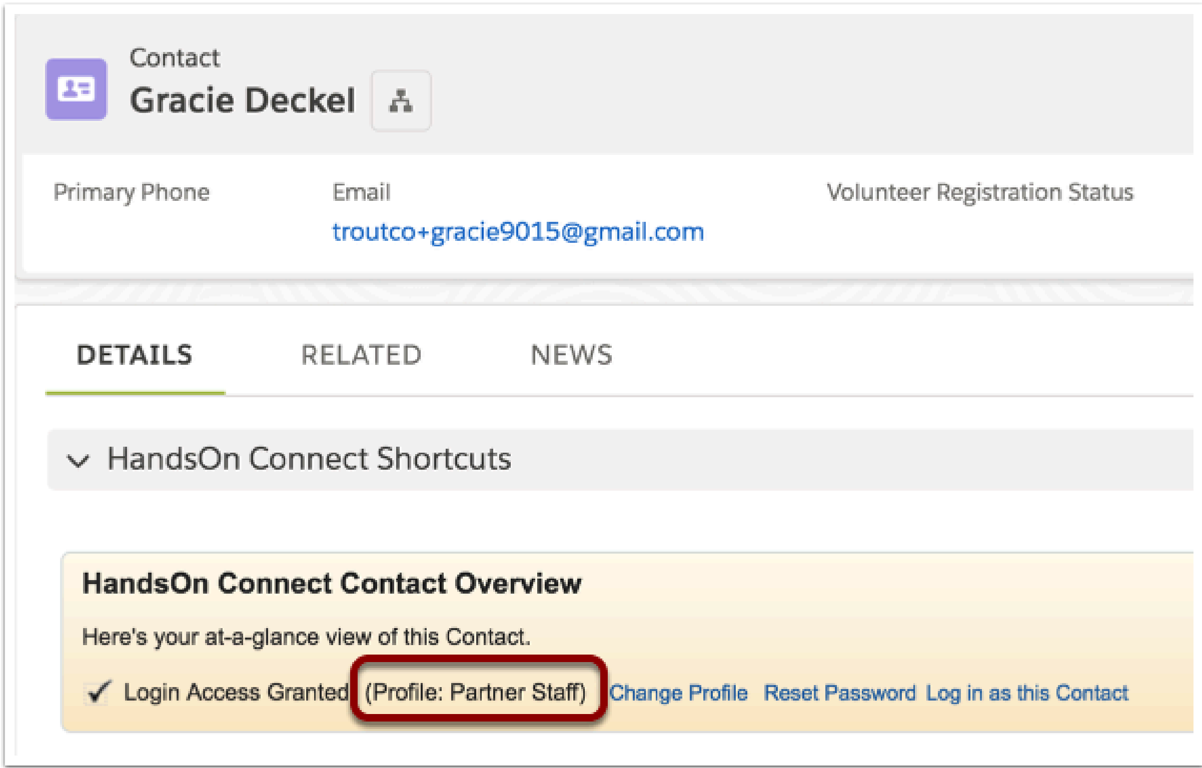
2. Select the Organization you wish the contact to be able to manage, and then set the value of the field HOC Access to "Partner Staff".

You can optionally assign a role to the relationship (such as "Primary Contact" or "Opportunity Coordinator" or any other values you wish to add to the roles picklist

Save the Relationship



3. Refresh the contact record and you'll see in the HandsOn Connect Contact Overview tab that the contact now has a profile of Partner Staff.

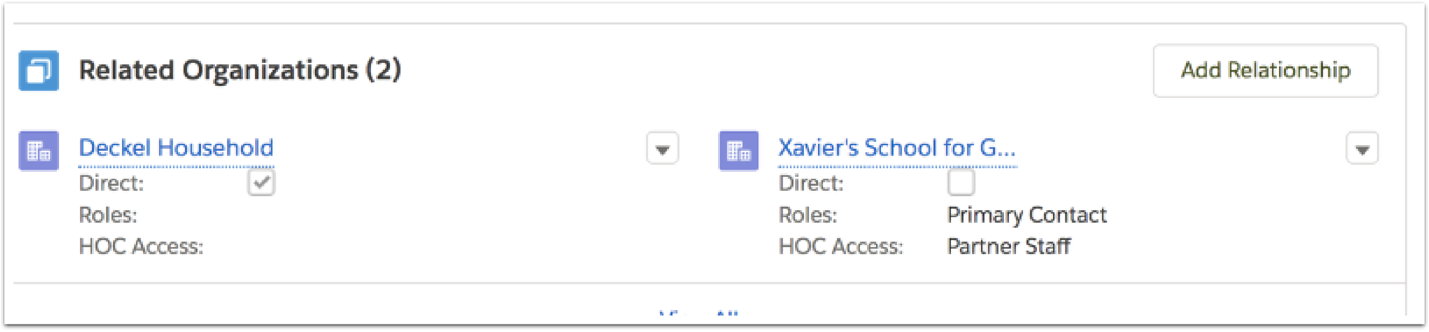


You can grant this contact access to manage additional organizations by adding additional Organization Contact

Relationship records.

You can also add relationships *without* granting partner staff access. Only relationships where the HOC Access field has a value of "Partner Staff" will give them access to manage that organization.

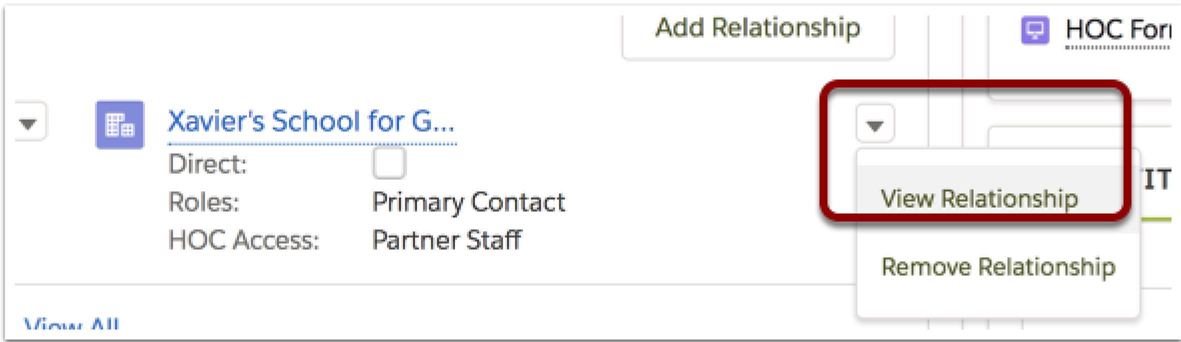
In the related list below, the contact only has HOC Access for "Xavier's School" -- not for the Deckel Household. (which is the direct account associated with the contact. (Household Accounts are automatically created for those using the Non Profit Success Pack)

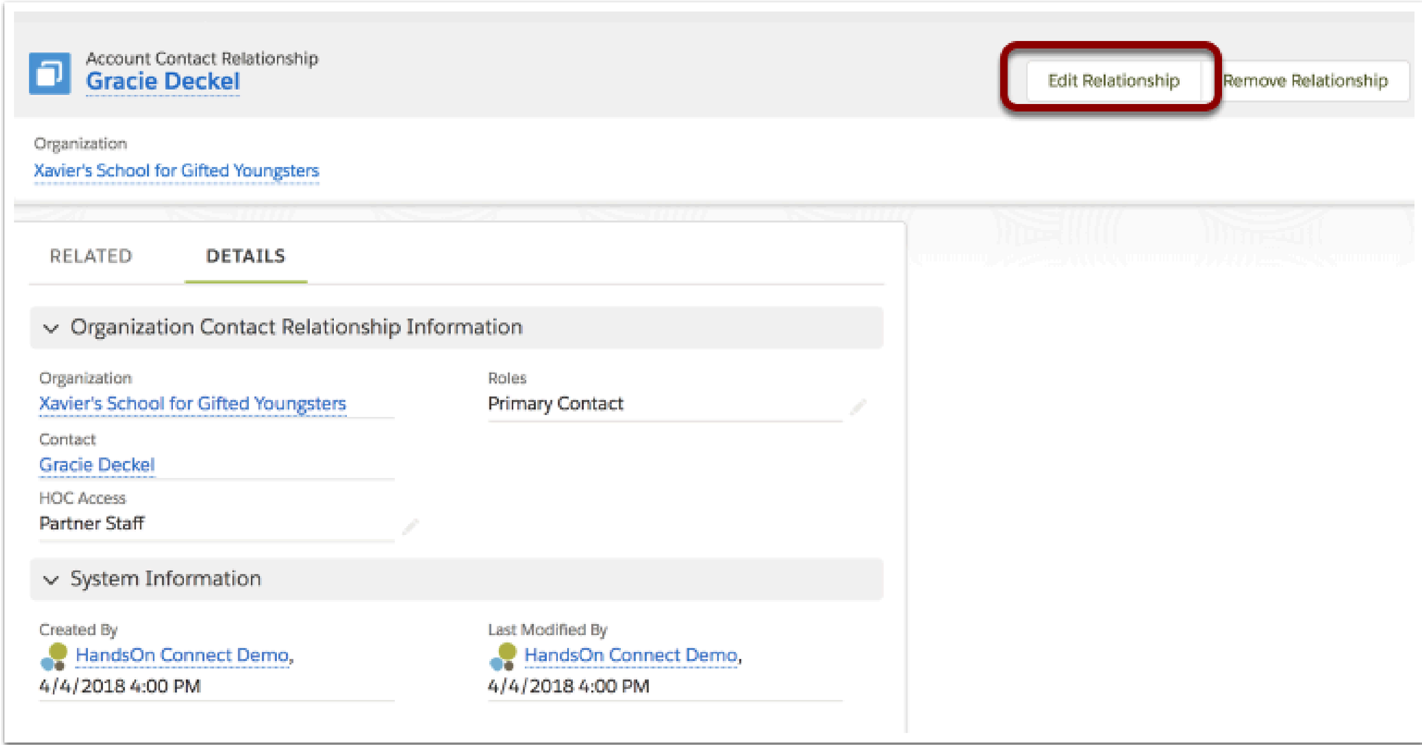


Editing Existing Relationships

You can edit any existing relationship by choosing "View Relationship" in the picklist associated with each relationship - and then, upon viewing the relationship, clicking on the "Edit Relationship Button"

You can also remove relationships you no longer wish to keep.




Account Contact Relationship
Gracie Deckel
Edit Relationship
Remove Relationship
Organization
Xavier's School for Gifted Youngsters
RELATED
DETAILS
Organization Contact Relationship Information
Organization
Xavier's School for Gifted Youngsters
Roles
Primary Contact
Contact
Gracie Deckel
HOC Access
Partner Staff
System Information
Created By
HandsOn Connect Demo,
4/4/2018 4:00 PM
Last Modified By
HandsOn Connect Demo,
4/4/2018 4:00 PM