

# Granting Partner Staff Access to Contact (HOC Flex Configuration)

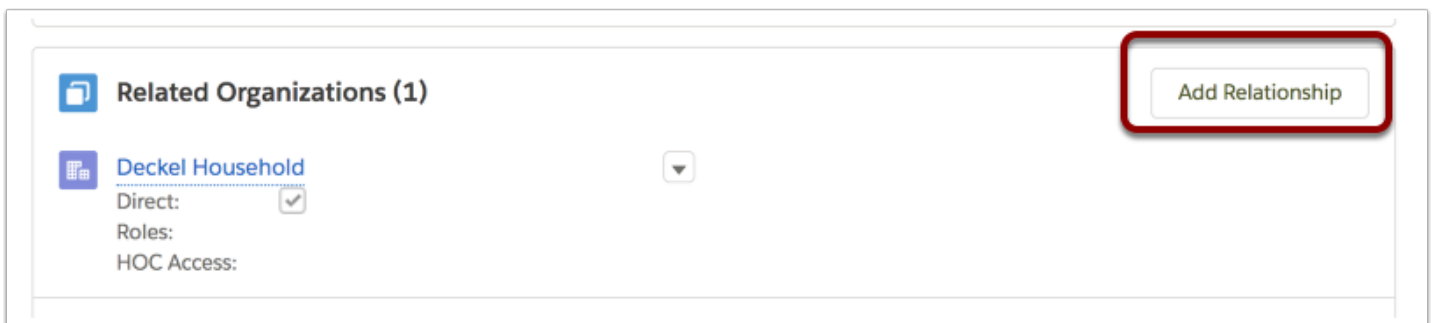
In The HOC Flex Configuration Partner Staff Access is granted in a different manner than the HOC Standard Configuration.

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

### New Account Contact Relationship

**Organization Contact Relationship Information**

**\* Organization**

X Xavier's School for Gifted Youngsters

**\* Contact**

X Gracie Deckel

**HOC Access**

X Partner Staff

**Roles**

X Influencer  
X Technical Buyer  
X Other  
X **Primary Contact**

Cancel Save & New Save

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.

**Contact**

X
**Gracie Deckel**

Primary Phone

Email

Volunteer Registration Status

troutco+gracie9015@gmail.com

**DETAILS**

RELATED

NEWS

✓ HandsOn Connect Shortcuts

**HandsOn Connect Contact Overview**

Here's your at-a-glance view of this Contact.

✓ Login Access Granted

(Profile: Partner Staff)

Change Profile
Reset Password
Log in as this Contact

**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)

**Related Organizations (2)** Add Relationship

Organization	Direct	Roles	HOC Access
Deckel Household	<input checked="" type="checkbox"/>		
Xavier's School for G...	<input type="checkbox"/>	Primary Contact	Partner Staff

## 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.


**Xavier's School for G...** Add Relationship

Organization	Direct	Roles	HOC Access
Xavier's School for G...	<input type="checkbox"/>	Primary Contact	Partner Staff

View All

**Actions:**

- View Relationship
- Remove Relationship

 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](#)


Contact  
[Gracie Deckel](#)

HOC Access  
Partner Staff

Roles  
Primary Contact

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