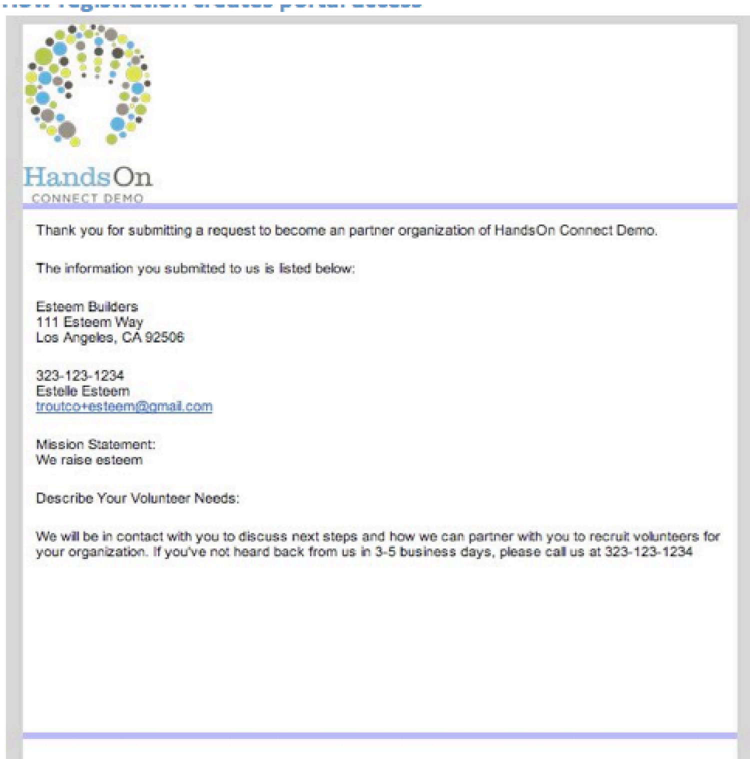
Granting Portal Access to Partner Staff who have registered their organization via the public site

Having an organization register on the public site is the easiest way to initiate the process of granting portal access to contacts at a partner organization. This lesson describes what the process is like when the partner signs up via the Organization Sign Up page.

You may find it easier for even your staff and administrators to enter partner organizations in this way, as it automatically creates both the organization and a contact (or two) for the organization, and ensures that all required fields necessary to grant them portal access are completed.

When an organization registers on the public site, contacts are created for their **Organization** and for their Primary **Contact** and a **Volunteer Coordinator** (if they specified one). All required fields are automatically populated. An email notification is sent to the partner notifying them you are reviewing their application.

This email is sent to the person who submits an application to become a partner on your public site:



HandsOn CONNECT DEMO

Thank you for submitting a request to become an partner organization of HandsOn Connect Demo.

The information you submitted to us is listed below:

Esteem Builders
111 Esteem Way
Los Angeles, CA 92506

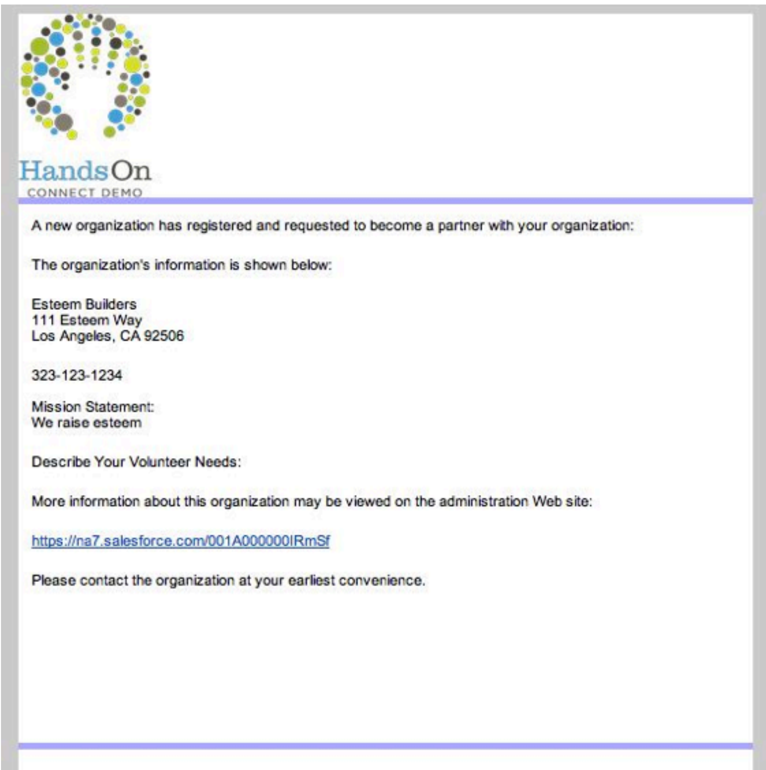
323-123-1234
Estelle Esteem
troutco+esteem@gmail.com

Mission Statement:
We raise esteem

Describe Your Volunteer Needs:

We will be in contact with you to discuss next steps and how we can partner with you to recruit volunteers for your organization. If you've not heard back from us in 3-5 business days, please call us at 323-123-1234

When the application is submitted, your **Partner Approval Manager** receives an email notification and a Task is created for them on their admin home page reminding them that a partner is awaiting review and approval.



HandsOn
CONNECT DEMO

A new organization has registered and requested to become a partner with your organization:

The organization's information is shown below:

Esteem Builders
111 Esteem Way
Los Angeles, CA 92506

323-123-1234

Mission Statement:
We raise esteem

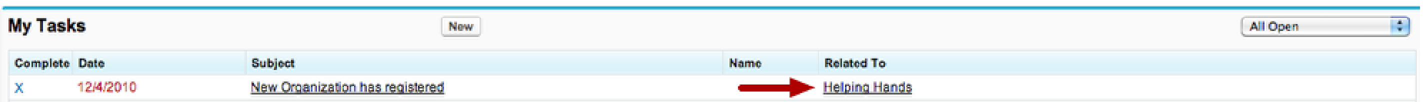
Describe Your Volunteer Needs:

More information about this organization may be viewed on the administration Web site:

https://na7.salesforce.com/001A000000IRmSf

Please contact the organization at your earliest convenience.

The task on your partner approval's home page looks like this.

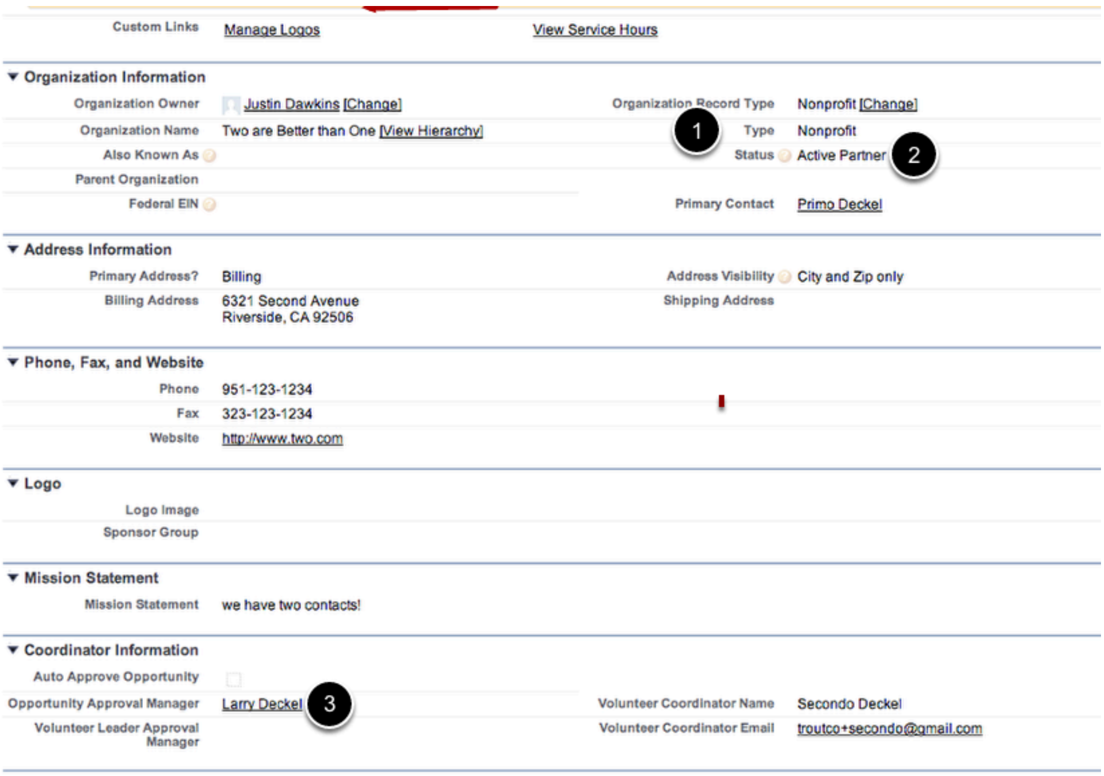


My Tasks New All Open

Complete	Date	Subject	Name	Related To
X	12/4/2010	New Organization has registered		Helping Hands

You can click on the link to the organization name and be taken directly to the organizational record you need to review.

There are three fields to update before granting portal access to a partner organization:



What business processes your organization uses **before** granting portal access and making an organization a full partner are up to you, but you can use email templates, tasks and events to manage that process. When it is complete, you'll need to update the organization record before granting portal access to its contacts through their contact records.

Before Granting partner portal access to an organization's contacts, you must update three fields in the organization record

1. Choose the correct type of organization in the **Type** field

2. Change the status of the organization from pending to **Active Partner.**

3. Specify who in your organization will approve opportunities submitted for posting from this partner. Populate this in the "**Opportunity Approval Manager**" field.

(It you only have one Opportunity Approval Manager - this may be automatically filled in for you!)

You can add any other detail to the organization record, but these three fields are mandatory before granting portal access.

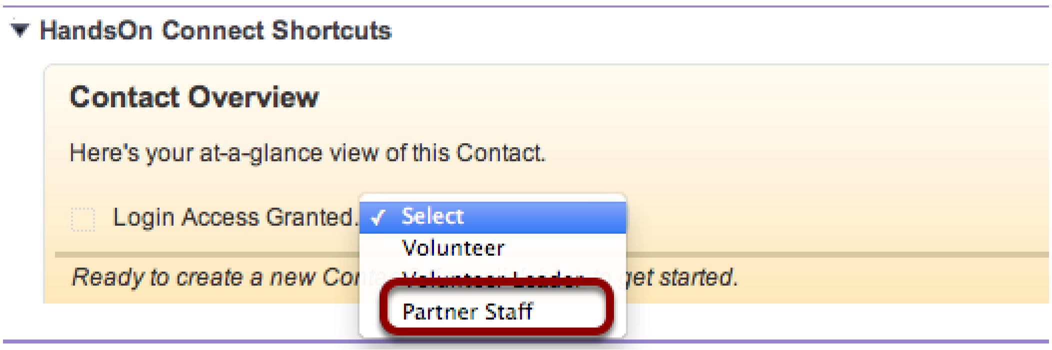
NOTE: Be sure to train your partner contact on using the portal before granting them access. Using the portal is not self-explanatory!

If you've administratively created this account, you'll need to also fill in the field "Primary Contact" and save the record, before you can change them to an active partner.   (This is automatically populated for you when the organization registers themselves via the public site).

Note: This is the procedure for HandsOn Connect instances in the 'standard configuration". (Unless you've been informed you are in the 'Flex" configuration, you are in the HOC Standard Configuration.

If your organization is in the 'Flex Configuration" see this article on granting partner staff access as its handled differently in the flex configuration.

Now go to the contact record of each contact associated with the organization you wish to grant portal access to.



Generally, you will be granting access to the primary contact of the organization, and perhaps to a Volunteer Coordinator if they named a second person during the application process.

Clicking on the "Grant Portal Login" link for a contact that is associated with an organization that is an Active Partner - will give you the option of granting them "Partner Staff" profile and license. This enables you to add as many contacts as needed with access to a partner's portal.

When a partner staff portal license has been granted - the contact(s) will receive an email with instructions on logging in and a temporary password. When they first log-in they will be asked to reset their password and then they will be logged into the Partner Portal.

When you grant portal access for the contacts in a partner organization they receive one (or two) emails

The First email is the email template "Organization Registration Activation". This email notifies them that you have approved their application and granted them partner login status. You can optionally edit this email template and add information about how to get trained on using the portal, etc.

HandsOn Connect
Cloud Solutions

Dear {!Contact.Name},

You have been granted access to the Partner Portal with {!Organization.Name}. If you've not previously created a member account on our site, an email with your log in information and a link to set your password will be sent to you in a separate email.

If you already have an active login and password for our site it will remain the same but when you log in you'll be taken to the partner portal.

As an approved user representing {!Account.Name}, you now will be able to submit opportunities that will appear on our opportunity search engine and on our opportunity calendar.

Your access will allow you to:
- Update your organizational information
- Submit new opportunities
- Edit existing opportunities
- View volunteer sign-ups
- Approve and schedule volunteers who have expressed interest in opportunities that do not permit immediate sign-up
- Email volunteers
- Report attendance and service hours
- and more.

To log in to the organization portal, go to:
{!Contact.HOC__HOC_Domain_Name__c}

We look forward to working with you!

The {!Organization.Name} Staff

They may also receive a second email with instructions on setting a password for their account.

Note: If they already had an account as a volunteer or volunteer leader, they will not receive an email asking them to set a password. Their previous login password will still be in affect.