

Set up an External Identity User

- [Background](#)
- [Configuration](#)
 - [Profile](#)
 - [Settings](#)
- [Code](#)
 - [Create Contactless User](#)
 - [Create Contact and link to User](#)
 - [Upgrade User to Customer Community License](#)

Background

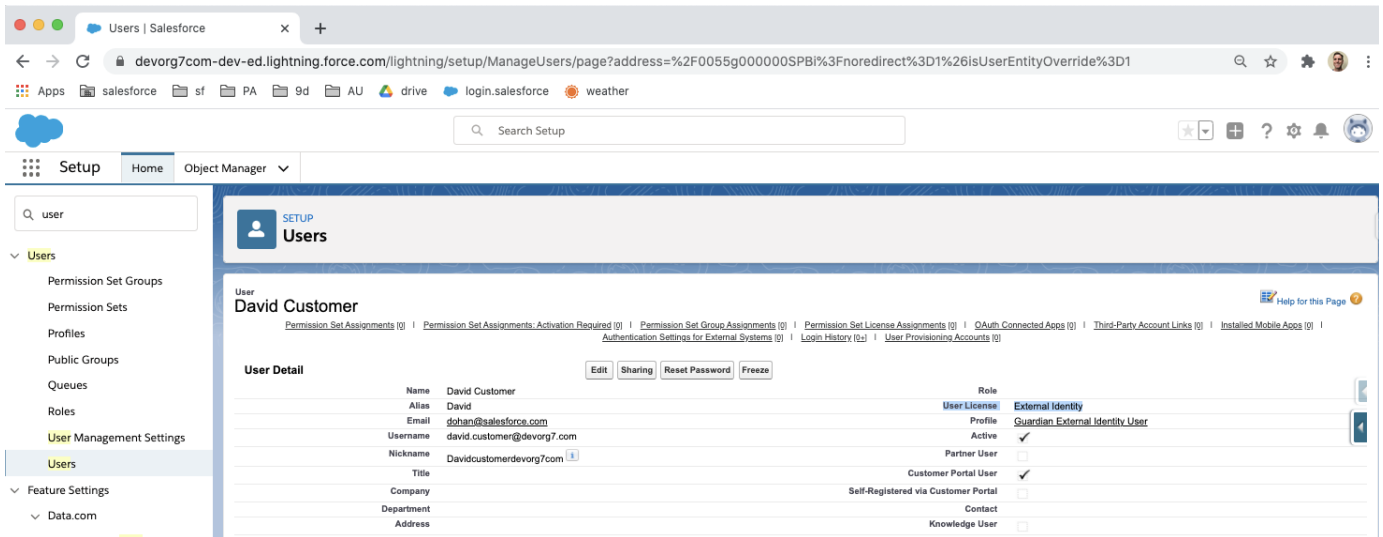
To enable a customer as a Customer Community user, they must first have an Account and Contact record. From the Contact record, the Community user is created and the User is linked to the Contact.

When using an org as an Identity Provider for Single Sign On, the customer can be created as a User only (Contactless User). Then in the Service Provider org, the customer will be set up with the User, Contact and Account.

When creating a customer as a Contactless User, the User is assigned an External Identity license instead of a Customer Community license. Note that a customer with a User, Contact and Account record can also be assigned an External Identity license.

Contactless User Screenshot below

- User License = External Identity
- Contact = null



The screenshot shows the Salesforce 'Users' page for a user named 'David Customer'. The user is assigned the 'External Identity' license and the 'Guardian External Identity User' profile. The user is active and has the 'Customer Portal User' checkbox checked. The user's email is 'david.customer@devorg7.com' and their username is 'david.customer@devorg7.com'. The user's role is 'External Identity'.

Field	Value
Name	David Customer
Alias	David
Email	david.customer@devorg7.com
Username	david.customer@devorg7.com
Nickname	Davidcustomerdevorg7com
Title	
Company	
Department	
Address	
Role	External Identity
User License	External Identity
Profile	Guardian External Identity User
Active	<input checked="" type="checkbox"/>
Partner User	<input type="checkbox"/>
Customer Portal User	<input checked="" type="checkbox"/>
Self-Registered via Customer Portal	<input type="checkbox"/>
Contact	
Knowledge User	<input type="checkbox"/>

Configuration

Profile

Ensure the following profile configuration is performed in the Identity Provider org:

- The profile must be related to the External Identity License
- Check *API Enabled* permission
- Assign the profile to the Connected App of the Service Provider

Settings

- Setup > Users > User Management Settings > Enable *Contactless External Identity Users*

Code

Create Contactless User

Note that this operation can be performed via apex code or API

Refer to Help page: https://help.salesforce.com/articleView?id=users_contactless_users_create_users.htm&type=5

```
--Create External Identity User in Identity Provider org
User u = new User();
u.FirstName = 'David';
u.LastName = 'Customer';
u.Email = 'dohan@salesforce.com';
u.Alias = 'David';
u.Username = 'David.customer@devorg7.com';
u.CommunityNickname = 'Davidcustomerdevorg7com';
u.FederationIdentifier = 'David123';
u.LocaleSidKey = 'en_AU';
u.TimeZoneSidKey = 'Australia/Sydney';
u.ProfileID = '00e5g000000Hj47'; //Guardian External Identity User
Profile Id
u.LanguageLocaleKey = 'en_US';
u.EmailEncodingKey = 'UTF-8';
insert u;
```

Create Contact and link to User

Either create a new Account or link the Contact to an existing Account

Refer to Help page: https://help.salesforce.com/articleView?id=users_contactless_users_upgrade_users.htm&type=5

```
--Create Contact for External Identity User in Identity Provider org
Account a = [SELECT Id FROM Account WHERE Id = '0015g00000038e7IAAQ'];
//Account that is storing the customers
Contact c = new Contact();
c.FirstName = 'David';
c.LastName = 'Customer';
c.Email = 'dohan@salesforce.com';
c.AccountId = a.id;
insert c;
User u = [SELECT Id FROM User WHERE Name = 'David Customer'];
u.ContactId=c.id;
update u;
```

Upgrade User to Customer Community License

```
--Update External Identity User Profile to Customer Community User  
Profile in Identity Provider org  
Profile p = [select id from profile where name='Guardian Customer  
Community Plus Login User'];  
User u = [select Id from User where Name = 'David Customer'];  
u.profileId = p.id;  
update u;
```