

Document	ENS: Project Documentation
Description	Project Documentation
Document Version	V1.0, 18 Jan, 2016

[Overview](#)

[Requirement](#)

[Partner Activation](#)

[Partner Account Enable](#)

[Partner Account Disable](#)

[Partner User Creation](#)

[Partner User Deactivation](#)

[Job Sharing Automation](#)

[Partner Portal Navigation](#)

[Account Summaries View](#)

[Account View](#)

[Job View](#)

[Technical Implementation Information](#)

[Sharing Automation](#)

[Job Lookup relationship changes](#)

Overview

ENS International (ENS) is an existing Salesforce customer. ENS has one Enterprise Edition and 10 Force.com licences in use by ENS internal staff. ENS is looking to implement a Salesforce Partner Community environment to provide 60 partners with access to Salesforce information. The ENS partners are licenced to sell ENS Training and Consulting services.

There is an existing database of 55,000 contacts in Salesforce. A mass update of the records will assign the appropriate permissions to the existing accounts and contacts in Salesforce. There are a number of accounts and contacts that are not currently linked to a Partner. These accounts can be allocated to a Partner to take ownership of the account and create an opportunity, e.g. activate a dormant account.

Requirement

The requirement is to deliver the following tasks for Salesforce customisation:

- Architecture and Design - Review the current Salesforce configuration and security settings
- Mass update of the existing records to assign accounts and contacts to Partner users
- Partner Community setup using default Salesforce Tab style user interface
- Setup 60 Partners users in the Community
- Setup the sharing rules and security settings for the Partner Community
- Generate reports - subject to allocated time
- Knowledge Transfer

Partner Activation

This section describes about how to enable a partner account and partner user.

Partner Account Enable

To enable a Partner Account:

- Create a new business account / Browse an existing account
- Click on the **Manage External Account**
- Click on **Enable as Partner**

Once this is done, this will become a partner account, and the contacts under it can be enabled as Partner user.

For more information, please refer to the official Salesforce help:

https://help.salesforce.com/apex/HTViewHelpDoc?id=partner_portal_creating_partner_accounts.htm&language=en

Partner Account Disable

A Partner account is not able to be deleted, unlike a normal Business Account

However, you can disable a Partner Account:

- Browse an existing Partner Account
- Click **Manage External Account**, then **Disable Partner Account**
- Click **OK** to confirm

The Partner account will then be disabled together with up to 15 partner users parked under this account

For more information, please refer to the official Salesforce help:

https://help.salesforce.com/apex/HTViewHelpDoc?id=partner_portal_disabling_partner_accounts.htm&language=en_US

Partner User Creation

Partner user can be created from a contact parks under a Partner Account using the following steps:

- Browse an existing partner account
- Create a new Contact or browse an existing contact under this partner account
- Click **Manage External User** and then **Enable Partner User**
- Edit the user record for this partner
 - Set Profile = **ENS Partner Community User**
 - Set **Active** flag
 - If the username is already being used (eg: already a CRM user), put a “.partner” as a postfix. Email remains the same
 - If you wish to sent the activation link to the Partner user upon creation, scroll to the bottom and checked the flag “**Generate new password and notify user immediately**”
- Then click **OK** to confirm

If activation link is sent to the Partner user, he will received an activation email. Follow the steps below to complete the activation:

- Login using the temporary password
- Enter a new password
- Retype the new password
- Continue to the Partner Portal

For more information, please refer to the official Salesforce help:

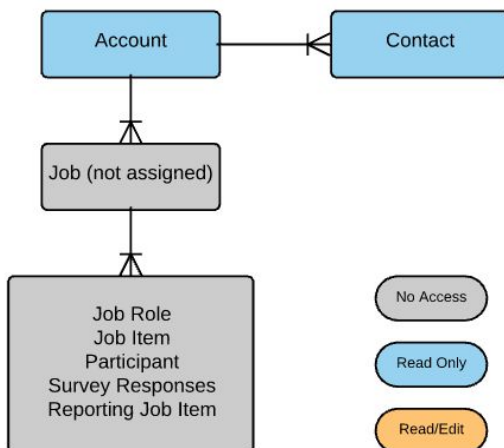
https://help.salesforce.com/apex/HTViewHelpDoc?id=partner_portal_creating_partner_users.htm&language=en

Partner User Deactivation

To deactivate a partner user, just go to the User detail page of the Partner user, unset the **Active** flag.

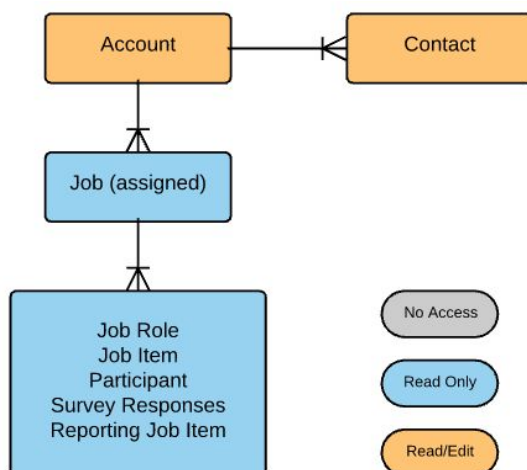
Job Sharing Automation

If a job is not assigned to a partner user, partner user will have **read-only access** to limited account and contact information read-access.



If an active Partner is one of the “**Sell**” **Job Roles** of the Job, he will have the following access:

- **Read/write access** to the job’s account and contact information
- **Read access** to the job and it’s related information
- No sharing will be granted if the Job Role added is not “**Sell**”

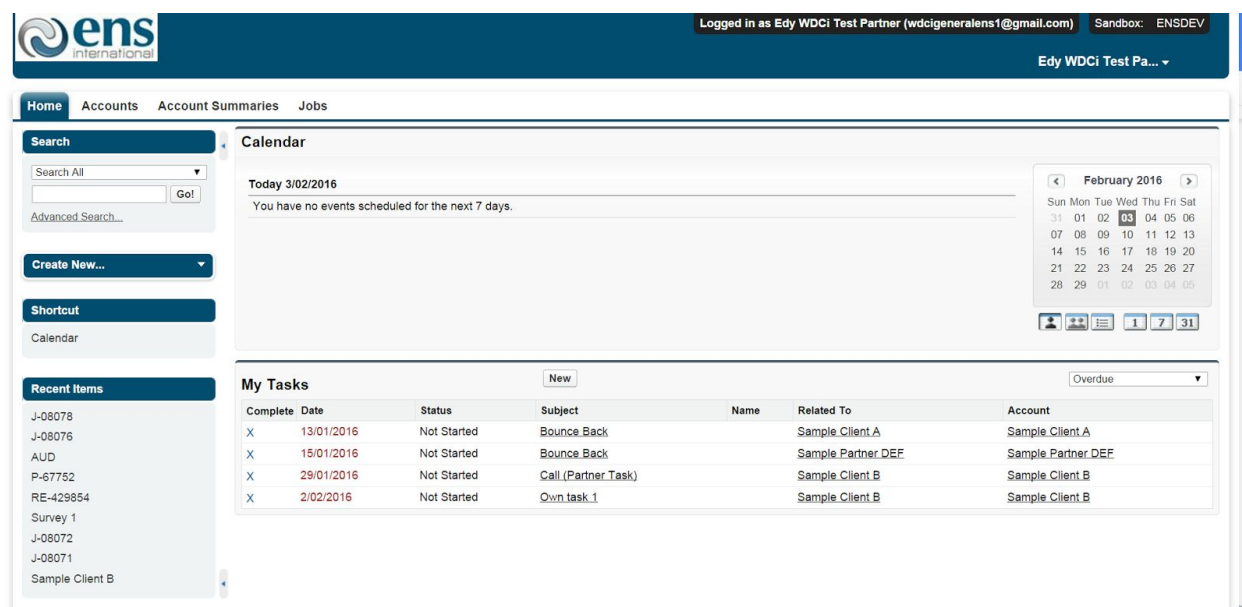


* These access will be removed once the relevant “**Sell**” Job Role is removed

Partner Portal Navigation

This is the landing page once a Partner user login to the portal. Below is the portal navigation:

- Using the **tabs** on top, user can navigate to Account, Account Summaries and assigned jobs
- User can search any of the records above using the **search** panel on the left
- Up to 10 recently viewed items are displayed as shortcut on the **Recent Items** section
- Task summary are displayed at the bottom



Complete	Date	Status	Subject	Name	Related To	Account
X	13/01/2016	Not Started	Bounce Back		Sample Client A	Sample Client A
X	15/01/2016	Not Started	Bounce Back		Sample Partner DEF	Sample Partner DEF
X	29/01/2016	Not Started	Call (Partner Task)		Sample Client B	Sample Client B
X	2/02/2016	Not Started	Own task 1		Sample Client B	Sample Client B

Account Summaries View

Partner User can access to all account information in a glance to the following information:

- Account Summary
- Client Status
- Billing Country
- Billing Locality
- Industry
- Sub Industry
- Sell 1
- Sell 2
- Spot 1
- Spot 2

For any Account that jobs are not assigned to any partner (No Sell or Spot), partner can contact ENS to request to take care of the account.

ens international

Logged in as Edy WDCi Test Partner (wdcigeneralens1@gmail.com) Sandbox: ENSDEV

Edy WDCi Test Pa...

Home Accounts Account Summaries Jobs

Search

Search All

Go!

Advanced Search...

Create New...

Shortcut

Calendar

Recent Items

J-08078
J-08076
AUD
P-67752
RE-429854
Survey 1
J-08072
J-08071
Sample Client B

Account Summary ...	Client Status	Billing Country	Billing Locality	Industry	Sub Industry	Sell 1	Sell 2	Spot 1	Spot 2
Sample Client A	Suspect	Australia		10. Human Services	Agriculture	Edy WDCi Test Part ..	Edy WDCi Test Part ..	Edy WDCi Test Part ..	Edy WDCi Test Part ..
Sample Client B									
Sample Client C									
test.projectb	Associate			2. Business Services	Agriculture				
test.Projectc	Suspect			2. Business Services	Forestry and logging				
Wdci.project test	Client			10. Human Services	Labour organisations				
WDCi.test.HK	Licencee			PUBLIC PROGRAM	Agriculture				

Account View

Partner User will have full read/write access to account information, if the account contains jobs that have been assigned to the partner user.

Home Accounts Account Summaries Jobs

Search

Search All

Go!

Advanced Search...

Create New...

Shortcut

Calendar

Recent Items

Sample Client A
J-08078
J-08076
AUD
P-67752
RE-429854
Survey 1
J-08072
J-08071
Sample Client B

Partner View - All Accessible Account

Action	Account Name +	Billing State/Province	Phone	Type	Account Owner Alias
Edit	Sample Client B				Srdjana
Edit	Sample Partner ABC				Srdjana
Edit	test.Projectc				Srdjana
Edit	Wdci.project test		047777777		Srdjana

Click on the account name to display the account details

Home Accounts Account Summaries Jobs

Search Search All Advanced Search...

Create New...

Shortcut

Recent Items

- Sample Client B
- Sample Client A
- J-08078
- J-08076
- AUD
- P-67752
- RE-429854
- Survey 1
- J-08072
- J-08071

Business Account **Sample Client B**

« Back to List: Accounts [Contacts \(1\)](#) | [Jobs \(1\)](#) | [Open Activities \(2\)](#) | [Activity History \(0\)](#) | [Google Docs, Notes, & Attachments \(0\)](#) | [Account History \(2\)](#)

Business Account Detail

Account Name	Sample Client B View Hierarchy	CSM
Parent Account	Sample Client B GROUP	Spot 1
Account GROUP	Sample Client B GROUP	Spot 2
Phone		Sell 1
Fax		Sell 2
Website		Current Claim Expiry 8/01/2017
Client Status	Prospect	Suspect Expiry Date
Licensing/Royalty Annual Payment Date		

Comments of Interest about Account

Description

Additional Information

Industry	10. Human Services
Sub Industry	Community services

Address Information

Billing Address	Shipping Address
-----------------	------------------

Partner can click on the Edit button to edit the account information.

Scroll further to the bottom, partner will be able to view the Contact & Job associated, also the open activities that assigned to the partner.

Contacts

Action	Contact Name	Title	Department	Primary Org Contact	Org Contact	Phone	Email	Mobile	Assistant Name
Edit	Staff Client B			<input type="checkbox"/>	<input type="checkbox"/>	0455504016	clientb@sampleemail.com		

Jobs

Action	Job Number	Job Type	Status	Job First Date	Certificate Date Text	NAM Name	Presenters	Job Days	No. of Participants	Retainer Hours Remaining
	J-08072	Training	Confirmed					5,000	1	0.00


Open Activities

New Task

Action	Subject	Name	Comment Summary	Next Step Comments	Next Step	Last Action	Related To	Due Date	Assigned To	Status
Edit Cis	Call (Partner Task)						Sample Client B	29/01/2016	Edy WDCi Test Partner	Not Started
Edit Cis	Own task 1						Sample Client B	2/02/2016	Edy WDCi Test Partner	Not Started
Edit Cis	Admin Task 3						Sample Client B	19/02/2016	Edy WDCi Test Partner	Not Started

Activity History

Click on the Contact to be able to view and edit limited contact information as below:


Contact
Mr. Staff Client B

Printable View

[Back to List: Accounts](#)
[Open Activities \(0\)](#) | [Activity History \(0\)](#) | [Google Docs, Notes, & Attachments \(0\)](#)

Contact Detail

Edit

Name	Mr. Staff Client B	Phone	0455504016
Account Name	Sample Client B	Mobile	
Title		Email	clientb@sampleemail.com
		Fax	

Edit

Open Activities

New Task Log Open Business Development Meeting Business Development Task

No records to display

Activity History

Add Comment Log Business Development Meeting

No records to display

Google Docs, Notes, & Attachments

Add Google Doc New Note Attach File

No records to display

Partner can also click on the “New Task” button to create a task that assigned to himself, eg: reminder to follow ups and call activities.

Job View

Partner User can only read-only access to the Job that assigned to them. User will not be able to edit any job and it's related information

[Home](#)
[Accounts](#)
[Account Summaries](#)
[Jobs](#)

Search


Advanced Search...

Create New...

Shortcut

Calendar

Recent Items


Jobs
Home

View: [Partner View - Job Viewable](#)

Recent Jobs

Recently Viewed

Job Number	Account	Status	Job Type	Job First Date	Job Last Date	NAM Name	CSM Name	Venue City	Job Comments
J-08078	test Project	ENS to Follow Up	Training				Edy WDCI Test Partner DEF	1	
J-08076	Wdci project test	Waiting for Client	Training			Edy WDCI Test Partner	Edy WDCI Test Partner	NSW	job comments
J-08072	Sample Client B	Confirmed	Training				Edy WDCI Test Partner	Sydney	
J-08071	Sample Client A	Confirmed	Training				Edy WDCI Test Partner	Sydney	

From the Job list, click on the Job Number to display the Job details. User can also click on the **Evaluation Report** to view the participant evaluation feedback.

[Home](#)
[Accounts](#)
[Account Summaries](#)
[Jobs](#)

Search

Advanced Search...

Create New...

Shortcut

Recent Items

Job J-08072

Back to List: Jobs

Job Detail

Evaluation Report

Job Number

J-08072

Account

Sample Client B

Job First Date

Job Last Date

Presenters

No. of Participants

1

Job Pax Awarded

1

Program Name

Training Program A

New Client

☐

Peer/Self Review Form Received

☐

Account Client Status

Prospect

Record Type

Training

Status

Confirmed

Closed Reason

Job Type

Training

Training Type

Incompany

Austlint

Australia

CSM Name

Edy WDCi Test Partner

Job 18 ID

Reconciliation

Job Days

5.000

Total Job Item Days

0.000

Billing Currency

AUD

Total Value Agreed FX

5,000.00

Difference to Allocation FX

4,010.00

Billing X Rate

1.000000

Certificate

Certificate Type

CDP Accreditation Date

Program Duration

Certificate Date Text

Rio Tinto Global Management

Within RT Global Contract?

☐

RT Program Type

RT Region

RT Product Group / Business

One Job record consists of the following related information:

- Job Role - Who is involved in handling the job
- Job Item - What Item/course/program this customer subscribed
- Participant - Who are the participant of the course/program
- Survey Responses - Feedback from the participant
- Reporting Job Items - For reporting purpose

<div>Job Roles</div> <div>Add Presenter Add Non-Presenter</div>										
Action	Job Role Number	Role	Contact	Materials Share %	Materials Share FX Total	Materials Share AUD Total	Prof Serv Share %	Prof Serv Share FX Total	Prof Serv Share AUD	
	JR-26802	Sell	Edy WDCi Test Partner	1.00	9.90	\$9.90	1.000000	0.00	\$0.00	
	JR-26803	Sell	Edy WDCi Test Partner DEF	2.00	19.80	\$19.80	2.000000	0.00	\$0.00	

<div>Job Items</div> <div>Add Material</div>										
Action	Job Item Number	Work Start Date	Presenter	ENSProduct	Quantity	Price FX	Item Value FX	Value Share Pcnt	Value Share FX Total	Hours per session
	JL-028128			eLearning Reinforcement Module	1.0000000	990.0000000	990.00	0.000000	0.00	7.00

<div>Participants</div>					
Action	Participant Number	Contact	Certificate Status	Contact Email Address	Account Name
	P-67754	Staff Client C	Awarded	clientc@sampleemail.com	Sample Client C

<div>Survey Responses</div>										
Action	Response Number	Survey Name	Participant Name	Question Number	Question Text	Answer Text	Response Text	Created Date	Submission ID	Answer Value
	RE-429854	Survey 1		1	Rate your feedback for this event	Good		8/01/2016		3.00

<div>Reporting Job Items</div>										
Action	Reporting Job Item Number	Job Role	Contact	Role	Job Item	Job Item ENSProduct	Job Item Record Type	Job Item FX Amount	FX Share Amount	Job Role Prof Services %
	RJL-00846388	JR-26802	Edy WDCi Test Partner	Sell	JL-028128	eLearning Reinforcement Module	Material	990.00	9.90	1.000000
	RJL-00846389	JR-26803	Edy WDCi Test Partner DEF	Sell	JL-028128	eLearning Reinforcement Module	Material	990.00	19.80	2.000000

<ENS>: Project Document

WDCi Group, 133 Alexander St
 Crows Nest NSW 2065 Australia
www.wdcigroup.net

Technical Implementation Information

This section describes about how to enable a partner account and partner user.

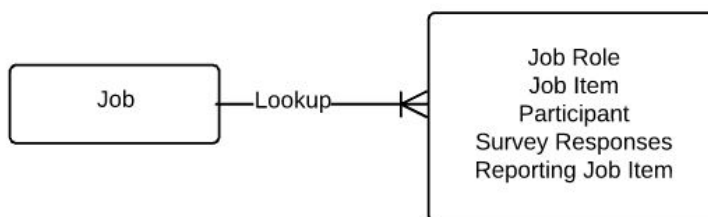
Sharing Automation

A Salesforce trigger (trigger name: JobRoleAction) is used to automate the sharing of Account, Contact, Job and Job related information once a Job Role="Sell" is added.

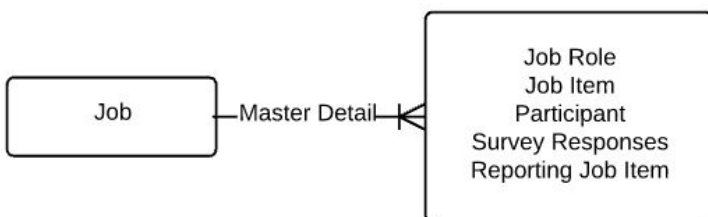
Job Lookup relationship changes

To cater for this sharing model, all the job lookup in the Job related information have been changed from Lookup to Master detail

Before



After



There is a few benefits in doing so:

- A much straight forward of sharing rule implementation implementation approach
- Utilising Salesforce out of the box inheritance sharing model that will minimise bugs while handling more complex scenarios
- Improve data integrity

Changing this to master detail relationship means that the Job lookup will be mandatory when creating these records. In the current production, there are a small amount of job related records which do not have any job linked to them. These are the orphan records left by the deleted Jobs and will be parked under a placeholder job in a one off migration practice.