Salesforce Lightning Partner Management

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SALESFORCE LIGHTNING PARTNER MANAGEMENT

Quickly set up a custom, branded space where you can invite your partners and work on driving channel sales together. This prepackaged solution is optimized for channel managers and partners to collaborate on and track sales data. A simplified setup combined with rich branding and a responsive UI let you quickly build an exclusive online experience, so you can invite your channel partners and track and monitor your sales together from a single location.

What You Get Out of the Box

The Lightning Partner Management solution contains prepackaged pages, components, business logic, and other features that support channel management (sales + marketing) processes.

Channel managers and partners can create and share leads, opportunities, accounts, and contacts together. In addition, the Lightning Partner Management solution provides these capabilities:

- Partner account management
- Partner recruitment, onboarding, and support
- Lead distribution
- Deal registration
- Content library
- Partner analytics
- Marketing development fund management

Prep Your Org for a Partner Community

Prep your org for partner users and data management before you create a community with the Lightning Partner Management solution.

1. After you buy partner licenses, set up your org for partner users.

   - Clone the standard Partner User profile.
   - Edit the Partner user profile and include access to the Deal Registration and Sales record types for leads. Modify other profile permissions based on your business needs.
   - Assign the "Global Partner Permissions" and "MDF Permissions" permission sets to partner users.
   - Modify sharing groups and rules to account for partner users.
   - Check organization-wide defaults for all the objects you want to share with your partners in the community.

2. Assign the channel manager role to the people in your internal org that work closely with partners. Give them the necessary permissions to be create and manage partner accounts, partner users, and sales and marketing data.

3. Next, create partner accounts and partner users. Channel managers can also do this. Create partner accounts for each partner organization that you work with. Add the people that you work with as contacts on the respective partner accounts and convert them to partner users.

**4.** Assign a partner license, the Partner User profile, and a partner role to each partner user.

Install the Lightning Partner Management Solution

Install the Lightning Partner Management solution to quickly create partner communities so channel managers can collaborate with partners on Salesforce data about channel sales.

Before installing the solution, make sure your org:

- Includes Partner Community or Partner Portal licenses
- Has Communities enabled

1. Download the Lightning Partner Management solutionand follow the installation instructions..

2. Verify that the solution installed correctly in your org. Type `Communities` in the Quick Find search box in Setup. Next, click **All Communities** and then click **New Community**.

The list of options should include the new Lightning Partner Management solution.
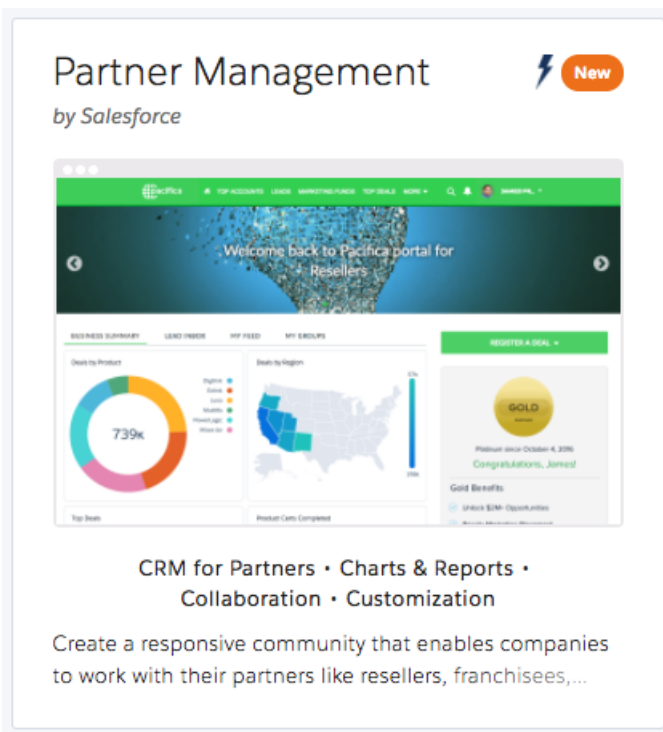
EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

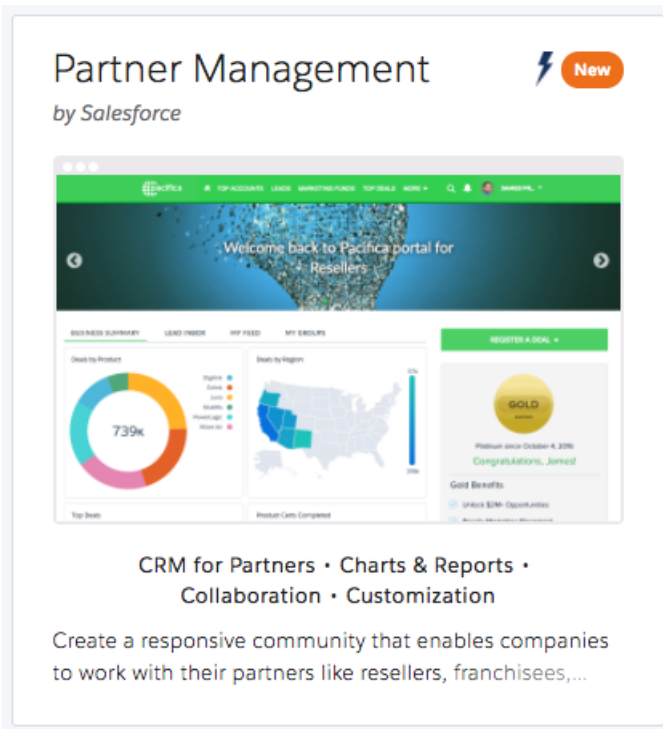To install the Lightning Partner Management solution:

- "Customize Application"

   "Create and Set Up Communities"

   "Download AppExchange Packages"

Create a Partner Community

Creating a partner community is simple and quick with the Lightning Partner Management solution.

After you install the Lightning Partner Management solution:

1. In Setup, enter `Communities` in the Quick Find box, and select **All Communities** from the filtered list, then click **New Community**.

2. Choose **Partner Management**.

3. Click **Get Started**.

4. Give the community a name and a unique URL qualifier and click **Create**.

   The URL qualifier value is appended to your community domain name to create a unique URL for this community. For example, if your domain is `UniversalTelco.force.com` and you're creating a partner community, you can designate the URL as `UniversalTelco.force.com/partners`.

5. On the confirmation page, click **Build & Customize** to customize and build your community with Community Builder.

6. Access Community Management from the dropdown menu and activate the community from **Administration** > **Settings**.

7. Next, go back to Community Builder and click **Publish** to publish your changes.

   ⚠ Important: Publishing the community is a prerequisite for some for using the custom pages available in the Lightning Partner Management solution.

8. Optionally, customize the community look and feel from the branding editor and publish your community again.

SEE ALSO:

Expose Sales and Marketing Data in Your Partner Community

The Lightning Partner Management solution comes prepackaged with custom objects and pages targeted at channel management. Adding an object or page to the navigation menu offers a quick and easy way to expose Salesforce sales and marketing data in your org. Predesigned custom pages are loaded with components that can be associated with information relevant to partners.

After you create a community with the Lightning Partner Management solution, switch to the Page Editor view in Community Builder.

1. In Community Builder, click 🗋 to switch to the Page Editor.

2. On the Home page, click **Topics**, and then click **Edit Navigation Menu** > **Add Menu Item**.

3. Delete the Topics menu item.

4. Based on your company's channel management process, add the applicable objects and custom pages to the navigation menu.

The following objects and pages are prepackaged in the Lightning Partner Management solution.

- **Salesforce Objects**: Account, Contact, Lead, Opportunity, Campaign, Cases (if you intend to provide customer support to your partners in the community)
- **Custom pages**: Marketing Funds, Content (requires Salesforce Content)

USER PERMISSIONS

To customize a partner community with the Lightning Partner Management solution:
- "Create and Set Up Communities"

5. Enter a name, select the type (object or page), and fill out the other details for each object or page. To add the next object or page, click **Add Menu Item**. Repeat until you've added all items.

   - Adding an object to the navigation menu automatically creates a record list view for that object in your community. When a partner user clicks the navigation menu item for an object, a list of object records they have permission to access is displayed. You can select a default list view while adding objects to the navigation menu.

   - Predesigned pages contain components targeted at partner users. Most components can be customized to expose views of Salesforce data relevant to your partner sales network.

6. Click **Publish Changes** when you're done with all the objects.

7. Optionally, customize the template header and welcome text in the Headline component.

8. Click the components within each tab on the Home page. Customize each component and associate a dashboard, list view, or data of your choice, where appropriate. The tabs, dashboards, list views, and components come prepackaged in the Lightning Partner Management solution.

   - **Business Summary**: Select a dashboard, such as Partner Account Management, from the dropdown list from the component editor.

   - **My Leads**: Select an appropriate list view for leads. We recommend All Open Leads or My Unread Leads.

   - **My Feed**: Optionally, customize the size and type of publisher.

   - **My Groups**: Customize the group list view.

9. Customize the actions associated with the **Register a Deal** button on the home page. The button and actions are prepackaged in the Lightning Partner Management solution. For these to work as intended, set up approval workflows for lead submission and deal registration.

10. Customize how leads are handled in your community by managing lead record types, lead assignment rules, and creating approval workflows.

11. Optionally, customize marketing fund management for your partner community.

Customize Lead Management in Your Partner Community

The Register a Deal button on the Home page of the Lightning Partner Management solution comes preconfigured with actions suited to channel management. You can define approval workflows and use assignment rules to manage your lead queue or automatically route them to the channel manager for approval.

To make sure partner community members can use lead management functionality:

- Assign the Partner user profile to partner users.
- Edit the Partner user profile and include access to the Deal Registration and Sales record types for leads.
- Assign the "Global Partner Permissions" and "MDF Permissions" permission sets to partner users.

On the Register a Deal button, the Deal Registration and New Lead actions are associated with two different lead record types called Deal Registration and Sales (included in the solution). Deal Registration automatically sends a registered deal submitted by a partner to the channel manager (or another authorized user) for approval. Set up and customize approval workflows for deal registration to work as intended. The Sales Lead creates a lead and is subject to any assignment rules that you define. The Lightning Partner Management solution comes with basic prepackaged assignment rules. Modify or add rules per your company's needs.

- To view or manage record type assignments for leads, in Setup, type `Leads` in the Quick Find box and go to **Leads** > **Record Types**.
- To create approval workflows, type `Approval` in the Quick Find box in Setup, and then click **Workflow & Approvals** > **Approval Processes**.
- To modify lead assignment rules, in Setup, type `Leads` in the Quick Find box and go to **Leads** > **Assignment Rules**

SEE ALSO:

Edit Community Pages and Components in Community Builder

USER PERMISSIONS

To customize a partner community with the Lightning Partner Management solution:
- "Create and Set Up Communities"

Manage Marketing Development Funds in a Partner Community

The Lightning Partner Management solution contains a custom page and custom objects to help you manage marketing funds for your partners. You can allocate and manage marketing fund budgets, requests, claims, and allocations for your partners from your community.

Add the Marketing Funds custom page to your community's navigation menu to manage marketing funds in your community. The buttons and components on this page use the following custom objects to store this data:

- Budget
- Budget Entry
- Fund Claim
- Fund Request

USER PERMISSIONS

To customize a partner community with the Lightning Partner Management solution:
- "Create and Set Up Communities"

To make sure partner community members can use lead management functionality:

- Assign the Partner user profile to partner users.
- Edit the Partner user profile and include access to the Deal Registration and Sales record types for leads.
- Assign the "Global Partner Permissions" and "MDF Permissions" permission sets to partner users.

Customize the Marketing Funds page and associate the components on the page with your preferred view of Salesforce data that you want to share with your partners.

1. From Community Builder, from the Pages menu, select **Marketing Funds**.
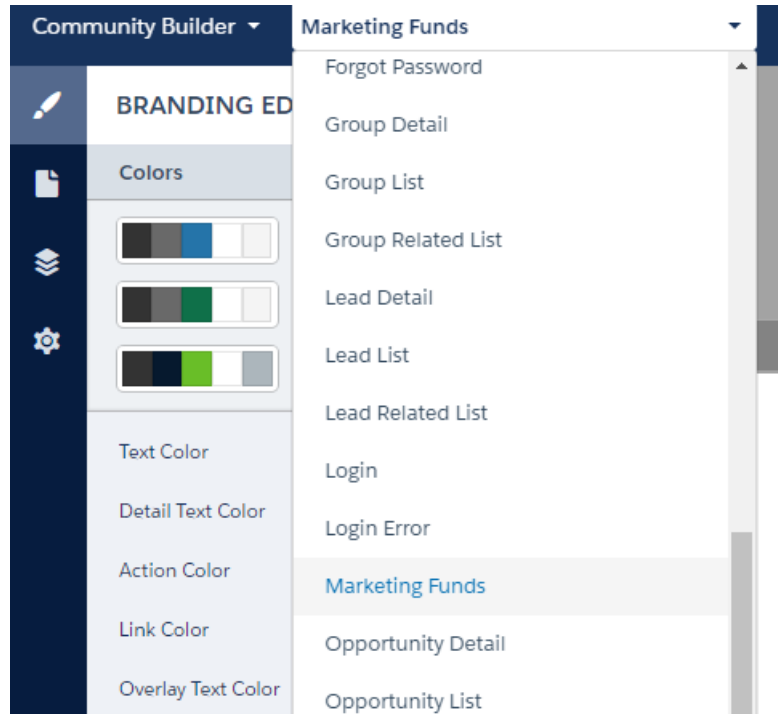
2. Click ▢ and switch to the Page Editor. All the components on this page are customizable.

3. Click and customize the headline component messaging for your partners.

4. Click through each tab and customize each component within the tabs. Make sure that you select the component within the tab and not the tab set. Select an appropriate list view filter for each, as shown in the examples.

- **MDF Budgets**: Select **Active Budgets**.
- **Fund Requests**: Select **Pending**.
- **Fund Claims**: Select **All**.

5. Optionally, customize the **Create a Fund Request** button to add or remove actions.

6. Next, create workflows for new Fund Requests and Fund Claims with inputs from your Sales and Marketing teams. Go to Setup and type `Approval` in the Quick Find box, and then click **Workflow & Approvals** > **Approval Processes**.

SEE ALSO:
Edit Community Pages and Components in Community Builder

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