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# Create and Manage Partner Portals

Salesforce, Spring '18






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# PARTNER PORTAL OVERVIEW

 **Note:** Starting in Summer '13, the partner-portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner-portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner-portals may continue to use their partner-portals or transition to Communities. Contact your Salesforce Account Executive for more information.

Partner relationship management allows companies to maximize the return on their channel investments and increase channel revenues by managing, tracking, and forecasting channel business alongside their direct sales business. It also helps partners sell more effectively, close more business, and achieve greater profits.

Empowering your partners with your Salesforce data can help you sell more without spending more. However, you want to control the information your partners can access, and you want your partners to work within an application that uses your company's branding. You can accomplish this by granting your partners access to a Salesforce partner portal.

A partner portal allows partner users to log in to Salesforce through a separate website than your non-partner users. Partner users can only see the data that you have made available to them. Furthermore, partner users can only manipulate data if you give them the appropriate user permissions.

You can customize the web portal to show your branding, and you can configure it to meet your functional and security needs, including enabling single sign-on for portals, so your partners have a single log in to access Salesforce. You can also have multiple portals to meet your different requirements for working with partners.

## SEE ALSO:

[Enable Partner Portals](#)

[Setting Up Your Partner Portal](#)

## Partner Portal Basics

You can create partner portals to help you better manage your partners.

The following table briefly describes the partner portal:

	<b>Partner Portal</b>
<b>Purpose</b>	Provides your business partners access to Salesforce data that you have made available to them
<b>User Interface</b>	Includes a highly customizable user interface using a point-and-click editor, and functionality similar to Salesforce, such as: permissions, custom objects, sharing rules, and Web tabs
<b>Supported Record Types</b>	Accounts, contacts, documents, ideas, leads, opportunities, solutions, and custom objects
<b>Quantity</b>	Depends on the number of licenses

## EDITIONS

Available in: Salesforce Classic

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

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**Partner Portal**

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**Administrator Controls**

Administrators can:

- Generate partner portal usernames and passwords
- Manage the information of partner portal users
- Manage partner portal users using permissions, roles, and sharing rules

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**User Controls**

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Partner users can update their own user information

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## SEE ALSO:

[Partner Portal Overview](#)

[Enable Partner Portals](#)

# WHAT IMPACT DOES COMMUNITIES HAVE ON PARTNER PORTAL CUSTOMERS?

Starting in Summer '13, the partner-portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner-portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner-portals may continue to use their partner-portals or transition to Communities. Contact your Salesforce Account Executive for more information.

Organizations that continue to use their portals will see the following changes:

- [Permissions and Fields Renamed](#)
- [Delegated Administrators Can Manage Partner Portal Users and Customer Portal Users](#)
- [Delegated Administration Available to Additional Licenses](#)
- [Public Field on Events and Tasks Now Applies to Partner Users in Communities](#)

## Permissions and Fields Renamed

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The following permissions and fields have been renamed to work across portals and communities. These fields have changed regardless of whether you enable Communities.

New Value	Old Value	Type
Manage External Users	Manage Partners	User permission
Manage External Account	Work With Portal (on account)	Field label
Manage External User	Work With Portal (on contact)	Field label
Delegated External User Administrator	Delegated Portal User Administrator	User permission
Convert External User Access Wizard	Convert Portal User Access Wizard	Sharing Tool

## Delegated Administrators Can Manage Partner Portal Users and Customer Portal Users

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Starting in Summer '13, external users with the "Delegated External User Administrator" permission can manage both partner portal and Customer Portal users under the same account. The delegated administrator can only manage users who have one of the profiles in their Delegated External User Profiles related list and are under the same account.

## Delegated Administration Available to Additional Licenses

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Users with the following user licenses can now manage external users, if they have the Manage External Users permission:

- Lightning Platform - One App
- Salesforce Platform

- Chatter Only

## Public Field on Events and Tasks Now Applies to Partner Users in Communities

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The `Public` field on activities was previously called `Visible in Self-Service`.

If Communities is enabled, this setting now applies to partner users. Specifically, tasks or events marked `Public` are visible to any external user in the community, as long as the user has access to the record the task or event was created on. If tasks or events aren't marked `Public`, only internal users and the task owner can see it.

Also, when a partner user tries to retrieve events or tasks using the API, the partner user can retrieve events and tasks only if they created the event or task OR if the event or task is `public`.

The `Public` field doesn't apply to partner users in partner portals; they continue to see all tasks.

SEE ALSO:

[Can I enable Salesforce Communities for my partners?](#)

[Migrating From Portals to Communities](#)

[Partner Portal Limits](#)

## Can I enable Salesforce Communities for my partners?

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Yes, you can use Communities to connect with your partners and share relevant sales data from your Salesforce org.


You can customize communities to meet your business needs, including:

- Choosing which members from your company and which partners can join
- Selecting which Salesforce features to include
- Applying your company's branding so that the community is recognizable
- Enabling your employees and partners to collaborate on Chatter and business processes (records)
- Enabling login options based on SAML for single sign-on for people outside your company
- Enabling users to self register for a community so that the administrator isn't responsible for adding users

To get started using Communities, contact your Salesforce Account Executive.



# PARTNER PORTAL USERS

 **Note:** Starting in Summer '13, the partner-portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner-portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner-portals may continue to use their partner-portals or transition to Communities. Contact your Salesforce Account Executive for more information.

## EDITIONS

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There are two types of users for partner portals—channel managers and partner users.

Channel managers are the internal users that manage your partners. Before enabling a portal, you need to ensure your channel managers have the appropriate permissions so they can manage partners.

Partner users are Salesforce users with limited capabilities. They are external to your organization but sell your products or services through indirect sales channels. They are associated with a particular partner account, have limited access to your organization's data, and log in via a partner portal.

The following table shows the storage per license as well as which features the partner user can access on the portal.


	Gold Partner License Type
Storage per license	5 MB of data storage per user
Documents	Yes
My Account Profile	Yes
Leads	Yes
Custom Objects	Yes
Approvals	Yes. Users can submit records for approval and view the status of approval requests in the Approval History related list on record detail pages, but can't be assigned as approvers.
Accounts	Yes
Opportunities	Yes
Salesforce CRM Content (Read Only)	Yes
Reports	Yes
Delegated External User Administration	Yes
Email	Yes

	Gold Partner License Type
Cases	Yes

## SEE ALSO:

- [Setting Partner Portal Role and User Defaults](#)
- [Setting Up Channel Managers for Partner Portals](#)
- [Creating Partner Users](#)

## Setting Up Channel Managers for Partner Portals

 **Note:** Starting in Summer '13, the partner-portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner-portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner-portals may continue to use their partner-portals or transition to Communities. Contact your Salesforce Account Executive for more information.

Channel managers are the internal users that manage your partners. Before enabling a portal, you need to ensure your channel managers have the appropriate permissions so they can manage partners.

The two main areas available for configuring your channel managers are profiles and roles.

### EDITIONS

Available in: Salesforce Classic

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

## Channel Manager Roles

Your role hierarchy determines what data your users can access. Users can always view and edit records that they own. In addition, users can always view, edit, and report on data owned by or shared with users below them in your role hierarchy. Channel manager roles are always directly above their partner users' roles in the hierarchy, giving channel managers access to all of the data owned by the partners they manage. When partner users are created on a partner account, Salesforce automatically places the partner users' role beneath the role of the channel manager who owns that partner account. To help you manage your channel managers and partner users, create a logical channel manager role structure.

## Channel Manager Profiles

Profiles determine the permissions users have, page layouts they see, the tabs and record types available to them, and other settings. Create a unique profile and design its settings specifically for channel managers. Use these tips when creating this profile:

### Make the following tabs available to channel managers

Leads, Accounts, Contacts, Opportunities, Documents, and Products. Also, if you plan to use Solutions or custom objects, make them available to your channel managers.

### Assign record types

Assign the appropriate lead record types to your channel manager profiles.

### Assign page layouts

Assign the appropriate page layouts to your channel manager profiles. Ensure that the **Enable Partner Portal Login** and **View Partner Portal User** buttons are included on the contact page layout for your channel managers.

**Enable the “Manager Partners” permission**

When this permission is enabled, channel managers can enable new partner accounts and partner users.

**Make the `Partner Account` field visible to channel managers on leads, accounts, and opportunities**

This allows channel managers to create list views or reports for tracking partner user activity.

**Make the `Last Transfer Date` field visible to channel managers on leads**

This allows channel managers to create lists views or reports for tracking partner user activity.

## Additional Tips


- Create a public group for channel managers. You can use this group for filtering and controlling access to documents.
- Create a lead queue for channel managers. You can use this queue for lead assignment rules.

SEE ALSO:

[Setting Partner Portal Role and User Defaults](#)


[Creating Partner Accounts](#)

## Creating Partner Accounts

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Existing organizations using partner-portals may continue to use their partner-portals or transition to Communities. Contact your Salesforce Account Executive for more information.

Partner accounts are Salesforce accounts that a channel manager uses to manage partner organizations, partner users, and activities when using a partner community or a partner portal. Each company with which you partner should be added to Salesforce as a business account. Channel managers are associated with partner accounts by account ownership. A channel manager who owns a partner account can access all the information and manage all the activities of the partner account, including that of any partner user associated with the partner account. This allows the channel manager to easily keep up-to-date on partner activities.

 **Note:** The partner user role is a subordinate of the account owner's role, therefore, all data for the partner user role rolls up to the partner account owner's role. Keep in mind that if you disable a portal user, their partner user role becomes obsolete and their data no longer rolls up to the partner account role.

To create a partner account:

1. Create a new business account.
2. Click **Manage External Account** and then, click **Enable as Partner**.
3. A confirmation dialog will open. Select **Yes, I want to enable this account as a Partner Account.**
4. Click **Confirm**.

 **Note:** If your organization has person accounts, they cannot be used as partner accounts. Only business accounts can be used as partner accounts.

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To view accounts:

- Read on accounts


To create accounts:

- Create on accounts

To enable a partner account:

- Manage External Users

Once you have a partner account created, you can add users to the account as contact records and then convert them to partner users. Partner users are Salesforce users with capabilities focused on managing leads. Partner users log in to Salesforce through the portal.


 **Note:** Partner accounts can't be deleted, but can be disabled.

SEE ALSO:

[Disabling Partner Accounts](#)


## Disabling Partner Accounts

Disabling a partner account disables external users associated with the account. We recommend disabling a partner account only if the account was accidentally enabled for portal access.

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Existing organizations using partner-portals may continue to use their partner-portals or transition to Communities. Contact your Salesforce Account Executive for more information.

You can't delete partner accounts, but you can disable them. Disabling the account permanently disables up to 15 external users associated with the account and removes them from all communities, groups, teams, permission sets, and sharing rules that they're associated with. This includes both active and inactive external users. Additionally, roles and groups associated with the account are permanently deleted and not moved to the Recycle Bin.

 **Note:** You can't disable an account if there are more than 15 active or inactive external users associated with it. You must disable the users before disabling the account.

1. Go to the Account detail page for the account you want to disable.
2. Click **Manage External Account**, then click either **Disable Partner Account**.
3. Click **OK** to confirm.

If you decide to enable the account in the future, you can re-enable individual contacts as partner portal users. Re-enabling a contact for a partner portal creates a new partner user and role that is not associated with the previous partner user and role. You can't restore deleted roles and groups.

SEE ALSO:

[Creating Partner Accounts](#)

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To view accounts:

- Read on accounts

To create accounts:

- Create on accounts

To enable a partner account:

- Manage External Users

## Managing Partner Users


### USER PERMISSIONS

To manage partner portal users:	Manage External Users
To create, edit, and delete profiles:	Manage Profiles and Permission Sets
To create, edit, and delete page layouts:	Customize Application
To set field-level security:	Manage Profiles and Permission Sets AND Customize Application
To set sharing rules:	Manage Sharing

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

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Existing organizations using partner-portals may continue to use their partner-portals or transition to Communities. Contact your Salesforce Account Executive for more information.

Because your Salesforce partner portal has functionality that is similar to Salesforce, you manage your partner portal users in much the same way as you manage your Salesforce users.

Consider how the following items affect how you manage partner portal users:

### Partner Portal Profiles

The permissions you assign to partner portal users define what functions they can perform within your organization's partner portal, such as whether users can view, create, or edit cases and custom object records. When you enable a partner portal, the Partner User profile is automatically created for your organization. The Partner User profile cannot be modified.

To enable partner users to log in to a partner portal, create profiles for your partners cloned from the Partner User profile. For each cloned profile, verify that the "API Only User" permission is not selected; if this permission is selected, users associated with the profile will not be able to log in to the partner portal. Cloning these profiles or creating permission sets also allows you to specify what portal users can do.

### Partner Portal Sharing Rules

After you enable your partner portal, the following groups and sharing rule category are created:

Group or Category	Description
All Partner Portal Users group	Contains all partner portal users in your organization
All Internal Users group	Contains all Salesforce users in your organization
Roles and Internal Subordinates sharing rule category	Allows you to create sharing rules in which you can choose specific Salesforce users in your organization by role plus all of the users in roles below that role, excluding any partner portal roles

You can use these groups and the sharing rule category to easily create sharing rules that grant all of your partner portal or Salesforce users access to specific data. You can also create sharing rules between partner portal users and Salesforce users, but not between partner users associated with different partner accounts.


If Salesforce Knowledge is enabled in your partner portal, portal users can see articles as permitted by the category group visibility settings.

### Partner Portal Role Hierarchy

A portal user role hierarchy is created for an account and its contacts when you enable the first partner portal user on that account. The account is added to the role hierarchy beneath the user that owns the account. Whenever you enable a contact as a partner portal user, he or she is automatically assigned to the User role in the account's portal role hierarchy. The default number of roles in portal accounts is three. You can reduce the number of roles or add roles to a maximum of three. Partner users can be assigned one of three roles:

- Executive
- Manager
- User

The Partner Executive role is immediately under the channel manager's role in the role hierarchy. The Partner Manager role is immediately under the Partner Executive role. The Partner User role is immediately under the Partner Manager role. Each role includes the partner account name as part of the role name. For example, if the partner account name is Acme, the three roles are Acme Partner Executive, Acme Partner Manager, and Acme Partner User. If the ownership of a partner account is changed to another channel manager, the partner user role is moved to that location in the role hierarchy.

 **Note:** Be careful managing your role hierarchy. Partner users at a given role level are always able to view and edit all data owned by or shared with users below them in the hierarchy, regardless of your organization's sharing model. Use administrative reports to manage your partner roles.

Accounts with different portal types have a separate role hierarchy for each portal. Role names include the portal type with which they are associated. For example, if Account A has both a partner portal and a Customer Portal, then roles for the Customer Portal are named "Account A Customer User" and roles for the partner portal are named "Account A Partner User."

All users in a partner user role have read access to all contacts under their partner account even when the contact sharing model is private. Partner users have read-write access to tasks associated with any object they can access. They also have read access to events associated with any object they can access. Partner users have the same access to Salesforce Knowledge articles as the account owner.

To view the roles assigned to your partner portal users, create a custom report, choose Administrative Reports, select Users as the data type, and add `Role` to your report columns.

### Deletion of Partner Portal Roles

When you delete partner portal roles, the roles are renamed to maintain the hierarchy. For example, if the Manager role is deleted from a three-role hierarchy of Executive, Manager, and User, then the Executive role is renamed to Manager but its ID remains the same. When you create a partner portal role, the hierarchy of the new portal role is automatically determined and created bottom-up.

You can delete multiple roles in bulk for better performance. For example, if most of your users are assigned the User role, you can delete the Executive and Manager roles. For more information on deleting partner roles, see the *SOAP API Developer Guide*.

### Super User Access

Users can be assigned super user access to give them access to data owned by other users belonging to the same role or those below in the hierarchy. For example, a Partner Manager with super user access can see data owned by other users in the Partner Manager role and the Partner User roles.

### Partner Portal User Licenses


Partner portal users cannot perform all of the functions that a Salesforce user can because partner portal users are assigned to a special type of user license.

SEE ALSO:

[Enable Partner Portals](#)

[Enable Partner Portals](#)

## Setting Partner Portal Role and User Defaults


 **Note:** Starting in Summer '13, the partner-portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner-portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner-portals may continue to use their partner-portals or transition to Communities. Contact your Salesforce Account Executive for more information.

You can set these partner portal role and user defaults:

- [Set the default number of roles for partner portal accounts](#) on page 11
- [Enable Partner Super User Access](#) on page 14
- [Assigning Partner Super User Access](#)

### Roles Per Partner Portal Account

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Existing organizations using partner-portals may continue to use their partner-portals or transition to Communities. Contact your Salesforce Account Executive for more information.

You can set the default number of roles for partner portal accounts. This benefits your partner portal by reducing the number of unused roles. You can set up to three roles; the system default is three.

For example, if you currently have three roles created when an account is enabled for your partner portal, but only need one role for new accounts, you can reduce the number of roles to one.

To set the number of roles per partner portal account:

1. From Setup, enter *Partners* in the **Quick Find** box, then select **Settings**.
2. Click **Set Portal Role and User Defaults**.
3. In the Portal Role and User Defaults page, click **Edit**.

#### EDITIONS

Available in: Salesforce Classic

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

#### USER PERMISSIONS

To set the number of roles per portal account

- **Customize Application**

To enable partner super user access

- **Customize Application**

#### EDITIONS

Available in: Salesforce Classic

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

#### USER PERMISSIONS

To set the number of roles per portal account:

- **Customize Application**


- In the **Number of Roles** drop-down list, set your default number of roles per partner portal account.
- Click **Save**.

The number of roles for existing portal accounts doesn't change with this setting.

SEE ALSO:

[Partner Portal Limits](#)

## Creating Partner Users

 **Note:** Starting in Summer '13, the partner-portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner-portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner-portals may continue to use their partner-portals or transition to Communities. Contact your Salesforce Account Executive for more information.

Once you have a partner account created, you can add users to the account as contact records and then convert them to partner users. Partner users are Salesforce users with capabilities focused on managing leads. Partner users log in to Salesforce through the portal.

Before creating partners, you should configure your portals; otherwise, your partner users may attempt to log into your portal before your portals are ready.

To create a partner user:

- View the partner account for which you want to create a partner user.
- Create a new contact for the partner user. Choose **New** from the Contacts related list. Fill in the appropriate details, and click **Save**.
- On the contact detail page, click **Manage External User** and choose **Enable Partner User**.
- Edit the user record for this partner.
- Click **Save**.

Once a partner user has been created, the partner account and the partner user can be edited independently. Changes made to one are not reflected in the other.

To troubleshoot issues or ensure the portal is configured appropriately, on the contact detail page, click **Manage External User** and choose **Log in to Portal as User**. A new browser window opens and you are logged into the portal as the portal user.

## Tips on Creating Partner Users

Consider the following when creating partner users:

- If you have enabled a user as a delegated administrator, the user cannot create an external user unless at least one partner profile has been added to the Assignable Profiles related list and the user has the "Manage External Users" permission.
- The **Role** drop-down is read-only the first time you enable a contact as a partner or customer user for an account. The next time you enable a contact on this account as a customer or partner user, you can select a **Role** for the user.
- The available profiles for the partner user are limited to the Partner User profile or profiles that have been cloned from it. Unlike a standard user, the partner user role is automatically assigned based on the account name. The partner user role is a subordinate of

### EDITIONS

Available in: **Salesforce Classic**

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

### USER PERMISSIONS

To create, edit, disable, or deactivate partner users:

- Manage External Users

To create contacts:

- Create on contacts

To view contacts:

- Read on contacts



the account owner's role, therefore, all data for the partner user role rolls up to the partner account owner's role. Keep in mind that if you disable a portal user, their partner user role becomes obsolete and their data no longer rolls up to the partner account role.

- Partner users and contacts cannot be deleted. If you no longer want a partner user to have access to the portal, deactivate the partner user.
- Partner contacts cannot be owned by a non-partner account.


#### SEE ALSO:

[Creating Partner Accounts](#)

[Delegate Partner User Administration](#)

[Setting Partner Portal Role and User Defaults](#)


## Delegate Partner User Administration

-  **Note:** Starting in Summer '13, the partner-portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner-portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner-portals may continue to use their partner-portals or transition to Communities. Contact your Salesforce Account Executive for more information.

You can delegate a subset of administrative rights to external users that have a partner user license. Delegated external user administrators can perform any of the following tasks for users, including both customer users and partner users, associated with their account:

- Create external users
- Edit external users
- Reset passwords for external users
- Deactivate existing external users

-  **Note:** When a delegated external user admin deactivates a portal user, the admin doesn't have the option to remove the portal user from teams that user is a member of.

You must use the original profile user interface to delegate administration rights for a partner user.

If you're using the enhanced profile user interface, disable it temporarily in the User Interface settings to complete this procedure.

To delegate a partner user administration rights:

1. From Setup, enter *Profiles* in the **Quick Find** box, then select **Profiles** and click a custom partner profile.  
You cannot edit the Partner User profile.
2. Click **Edit**.
3. Select **Delegated External User Administrator**.
4. Click **Save**.
5. Click **Edit** in the Delegated External User Profiles related list.
6. Select the external user profiles you want users with this profile to be able to administer. An external user delegated administrator can manage external users with Customer Portal, partner portal, or Communities profiles, as long as the users with the profile are under the same account.

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To manage partner portal users:

- **Manage External Users**

To create, edit, and delete profiles:

- **Manage Profiles and Permission Sets**

### 7. Click **Save**.

To change which profiles a delegated external user administrator can edit:

#### 1. From Setup, enter *Profiles* in the **Quick Find** box, then select **Profiles** and click a custom partner profile.

You cannot edit the Partner User profile.

#### 2. Click **Edit** in the Delegated External User Profiles related list.

#### 3. Select the external user profiles you want users with this profile to be able to administer.

#### 4. Click **Save**.

Delegated portal user administrators can click **Manage External User**, then **View Partner User** on the contact's detail page to view and edit the partner portal user's details:

- Click **Edit** to edit a partner portal user's details.
- Click **Reset Password** to reset the partner portal user's password.
- Click **Edit** and deselect the **Active** checkbox to deactivate the user.


 **Note:** Delegated partner user administrators can update portal users on any account to which they are transferred.

## Tips on Setting Up Delegated Portal User Administration

Consider the following when setting up delegated portal user administration:

- On the profile of users for which you are granting delegated portal administration:
  - Add the "Create" and "Edit" permissions on contacts so that delegated portal administrators can create and update contacts related to their account.
  - Set the Accounts and Contacts tab settings to Default On so that delegated portal administrators can view the Accounts and Contacts tabs and easily manage contacts related to their accounts.
- [Add the Accounts and Contacts tabs to your portal.](#)
- Set field level security and page layouts so that delegated portal user administrators can only access the account, contact, and case fields you specify.

## Enabling Partner Super User Access

 **Note:** Starting in Summer '13, the partner-portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner-portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner-portals may continue to use their partner-portals or transition to Communities. Contact your Salesforce Account Executive for more information.

You must have a partner portal enabled to use Partner Super User Access.

To enable Partner Super User Access:

1. Click From Setup, enter *Partners* in the **Quick Find** box, then select **Settings**.
2. In the Partner Relationship Management Settings page, click **Set Portal Role and User Defaults**.
3. Click **Edit** and select the **Enable Partner Super User Access** checkbox.

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To enable Partner Super User Access:


- **Customize Application**

You can disable Partner Super User Access by deselecting the `Enable Partner Super User Access` checkbox. However, if you reenable this feature, all users who were assigned Super User Access before the feature was disabled will automatically gain Super User Access again. See [Assigning Partner Super User Access](#) for more information.

## Assigning Partner Super User Access

Partner users can be assigned one of three roles: Partner Executive, Partner Manager, or Partner User (worker role).

Partner Super Users with Role	Can Access
Partner Executive	Data owned by all partner users and partner super users in the same role and those below them in the hierarchy (Manager and User roles).
Partner Manager	Data owned by all partner users and partner super users in the same role and those below them in the hierarchy (User roles).
Partner User (worker role)	Data owned by all partner users and partner super users in the same role (User roles).

 **Note:** Starting in Summer '13, the partner-portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner-portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner-portals may continue to use their partner-portals or transition to Communities. Contact your Salesforce Account Executive for more information.

To enable Partner Super User Access for your partner portal, see [Enabling Partner Super User Access](#).

- To assign super user access, go to the contact detail page of a partner account, click **Manage External User** and select **Enable Super User Access**.
- To remove partner super user access, go to the contact detail page of a partner account, click **Manage External User** and choose **Disable Super User Access**.

 **Example:** Consider these guidelines:

- Partner super users can access the data owned by other partner users and partner super users of the same role or those below them in the portal account hierarchy, even if the organization-wide default setting is Private.
- Partner super user access applies to cases, leads, custom objects, and opportunities only. Consider two partner super users with the same role under the same account, User A owns a few opportunities, and User B has manual share to another opportunity. Then User A will have access to all opportunities including those that User B has access to.

SEE ALSO:

[Setting Partner Portal Role and User Defaults](#)

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To create, edit, disable, or deactivate portal users:

- Manage External Users


To create contacts:

- Create on contacts

To view contacts:

- Read on contacts

# SETTING UP YOUR PARTNER PORTAL

 **Note:** Starting in Summer '13, the partner-portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner-portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner-portals may continue to use their partner-portals or transition to Communities. Contact your Salesforce Account Executive for more information.

Here is a high-level overview of the steps involved in setting up a partner portal:

**1.** Create one or more portals.

For each portal:

**a.** Configure the settings and communication templates.

The Convert Portal User Access wizard automatically displays after the first time you save settings for your first portal, whether it is the Customer Portal or partner portal. You can use this wizard to help ensure that records and folders owned by Salesforce users are not shared with portal users.

**b.** Customize the fonts and colors.

**c.** Customize the available tabs and tab order.

**d.** Configure portal languages.

**2.** Optionally, enable Salesforce CRM Content, Salesforce Knowledge, Entitlement Management, Ideas, or Answers as needed.

**3.** Create partner profiles.

For each partner profile:

**a.** Customize page layouts.

**b.** Customize list views.

Partner portal users can automatically see any list view with visibility settings marked `This view is accessible by all users`. We recommend that you create specific list views on all objects accessible to portal users, and then assign portal users to only the list views you want them to view.

**c.** Customize search layouts.

The search layouts in your Salesforce organization are the same search layouts used in your partner portal. Verify that search layouts on objects accessible to portal users only include fields you want them to view in search results.

**4.** Assign partner profiles to partner portals.

**5.** Optionally, enable single sign-on.

**6.** Enable login on each partner portal.

**7.** Create partner users.

SEE ALSO:

[Enable Partner Portals](#)

## EDITIONS

Available in: Salesforce Classic


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

## USER PERMISSIONS

To set up a partner portal:

- [Customize Application](#)


## Enable Partner Portals

 **Note:** Starting in Summer '13, the partner-portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner-portal, but want to easily share records and information with your partners, try Communities.


Existing organizations using partner-portals may continue to use their partner-portals or transition to Communities. Contact your Salesforce Account Executive for more information.

To enable the partner portal:

1. From Setup, enter *Partners* in the **Quick Find** box, then select **Settings**.
2. Click **Edit**.
3. Select the **Enable Partner Portal** checkbox.
4. Click **Save**.

 **Note:** After you enable the partner portal, you cannot disable it. However, you can prevent users from logging into your partner portal. For more information, see [Partner Portal Advanced Configuration](#) on page 33.

After you enable the partner portal for your organization, you can then [create one or more partner portals](#) to satisfy the various business needs of your customers..

 **Note:** You can create a maximum of 5 partner portals in your organization. Increases to that number are subject to product manager approval and require detailed use cases.

When you enable the partner portal, the following items are automatically added to your organization:

### Partner User profile

You can assign partner portal users to profiles cloned from this profile. For each cloned profile, verify that the "API Only User" permission is not selected; if this permission is selected, users associated with the profile will not be able to log in to the partner portal.

### Enable As Partner button on account records

Allows you to create a partner account.

### Enable Partner Portal User and View Partner Portal User buttons on contact records

Allows you to create a new partner user or view existing partner users.

### "All Partner Portal Users" and "All Internal Users" groups along with the "Roles and Internal Subordinates" sharing rule category

You can use these groups and the sharing rule category to easily create sharing rules that grant all of your partner portal or Salesforce users access to specific data.

Group or Category	Description
All Partner Portal Users group	Contains all partner portal users in your organization
All Internal Users group	Contains all Salesforce users in your organization
Roles and Internal Subordinates sharing rule category	Allows you to create sharing rules in which you can choose specific Salesforce users in your organization by role plus all of

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To enable the partner portal:

- **Customize Application**


Group or Category	Description
	the users in roles below that role, excluding any partner portal roles

SEE ALSO:

[Partner Portal Overview](#)


[Partner Portal Settings](#)

## Create a Partner Portal

 **Note:** Starting in Summer '13, the partner-portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner-portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner-portals may continue to use their partner-portals or transition to Communities. Contact your Salesforce Account Executive for more information.

After you have enabled the Salesforce partner portal, you can create partner portals to satisfy the various business needs of your customers.

 **Note:** You can create a maximum of 5 partner portals in your organization. Increases to that number are subject to product manager approval and require detailed use cases.

To create a partner portal:

1. From Setup, enter *Partners* in the *Quick Find* box, then select **Settings**.
2. Click **New**.
3. Set the following options:

Setting	Description
Name	Name of the partner portal as displayed on the portal's detail and edit pages, as well as the partner portal setup page. The name of the partner portal is not displayed on portal pages, but it does display in the browser title bar.  The name of your portal must be unique for your organization and not already in use by a Customer Portal or partner portal. Furthermore, an error may occur if you name a Customer Portal "partner portal" Customer Portal
Description	A description of the partner portal as displayed on the portal's detail and edit pages. The description of the partner portal is not displayed in the portal.

### EDITIONS



Available in: Salesforce Classic

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

### USER PERMISSIONS

To create partner portals:

- Customize Application

Setting	Description
Login Enabled	<p>Allows users to log in to the partner portal.</p> <p>We recommend that you do not select this checkbox until you have completed configuring your portal.</p> <p> <b>Note:</b> When you enable the partner portal, the default portal is set as <code>Login Enabled</code>.</p> <p>Users must be able to log in to the partner portal, be within their user profile's restricted IP range, and be within designated Login Hours in order to be able to reset their passwords.</p>
Administrator	<p>Click the lookup icon (  ) to choose a default administrator for your partner portal. All email notifications regarding your partner portal will be sent to this Salesforce user.</p> <p>When choosing an administrator for your partner portal, you can only select users that have the "Manage External Users" and "Customize Application" user permissions, and have access to the Documents folder that contains your partner portal <a href="#">Header</a>. You cannot deactivate a user selected as a portal administrator.</p>

### Portal Default Settings

Setting	Description
Logout URL	The URL of the Web page that displays when users log out of the partner portal, for example, "http://www.acme.com." If a logout URL is not specified, portal users return to the login page when they log out.
Show Action Confirmation	<p>Allows users to view confirmation messages after they complete an action in the partner portal. For example, after a user creates a lead in your partner portal, he or she views the message: "Lead has been created" if this setting has been enabled.</p> <p>Confirmation messages may help users clearly understand actions they have completed in your partner portal.</p>
HTML Messages Default Language	Specifies the language that portal HTML messages are displayed in when custom language portal HTML messages are not configured. This setting is only available for organizations that have multiple languages enabled.



### Email Notification Settings

Setting	Description
From Email Address	The email address from which all partner portal communication templates are sent, for example, "support@acme.com." Salesforce

## Email Notification Settings


Setting	Description
	sends the emails automatically, but they appear to portal users as if they were sent from this email address. If a portal user responds to a communication template, the response is sent to this address.
From Email Name	The name associated with the "From" Email Address, for example, "Acme Partner Support."
New User Template	The email template used to send a username and initial password to all newly-enabled partner portal users. By default, a sample template is automatically selected for you. This template must be marked as <code>Available for Use</code> .
New Password Template	The email template used to send a new password to existing partner portal users when you reset their passwords.
Lost Password Template	The email template used to send a new password to existing partner portal users when they reset their own passwords by clicking <b>Forgot your password?</b> on the login page of the partner portal.
Change Owner to Portal User Template	The email template used to send a notification to partner portal users when they become the new owner of a record in the portal.

## Look and Feel

Setting	Description
Header	<p>A text or HTML file that allows you to incorporate your organization's branding into the header of your partner portal.</p> <p>Click the lookup icon () to choose a file that has been uploaded to a publicly accessible folder on the Documents tab.</p> <p>The files you include in the <code>Header</code> and <code>Footer</code> lookup fields can have a combined size of up to 10 KB.</p> <p>We recommend that you do not add a header <i>and</i> a logo to your portal because they may not display properly together.</p> <p>You can position the logout link anywhere on the header by using the HTML tag: "<code>&lt;a href="/secur/logout.jsp"&gt;Logout&lt;/a&gt;</code>."</p>
Footer	<p>A text or HTML file that allows you to incorporate your organization's branding into the footer of your partner portal.</p> <p>Click the lookup icon () to choose a file that has been uploaded to a publicly accessible folder on the Documents tab.</p> <p>The files you include in the <code>Header</code> and <code>Footer</code> lookup fields can have a combined size of up to 10 KB.</p>



## Look and Feel

Setting	Description
Logo	<p>An image file (.jpg, .gif, .png) that allows you to incorporate your organization's branding into the top left header of your partner portal. Click the lookup icon (🔍) to choose a file that has been uploaded to a publicly accessible folder on the Documents tab and marked as an <code>Externally Available Image</code>.</p> <p>The file you include in the <code>Logo</code> lookup field can be up to 20 KB.</p> <p>We recommend that you do not add a header <i>and</i> a logo to your portal because they may not display properly together.</p>
Login Message	<p>A text or HTML file that allows you to incorporate your organization's branding into the header of the login page, forgot password page, and change password page of your partner portal. Click the lookup icon (🔍) to choose a file that has been uploaded to a publicly accessible folder on the Documents tab.</p> <p>The file you include in the <code>Login Message</code> lookup field can be up to 2 KB.</p> <p> <b>Note:</b> JavaScript and CSS code are automatically removed from HTML files used as the portal login message.</p>


#### 4. Click **Save**.

 **Note:** Contact Salesforce for information about the number of partner portals you can activate for your organization.

#### SEE ALSO:

[Enable Partner Portals](#)  
[Partner Portal Settings](#)  
[Profiles](#)


## Partner Portal Settings

 **Note:** Starting in Summer '13, the partner-portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner-portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner-portals may continue to use their partner-portals or transition to Communities. Contact your Salesforce Account Executive for more information.

To edit the settings and communication templates for a partner portal:

1. From Setup, enter *Partners* in the *Quick Find* box, then select **Settings**.
2. Click the name of the portal you want to edit.
3. Click **Edit**.
4. Set the following options:

Setting	Description
Name	<p>Name of the partner portal as displayed on the portal's detail and edit pages, as well as the partner portal setup page. The name of the partner portal is not displayed on portal pages, but it does display in the browser title bar.</p> <p>The name of your portal must be unique for your organization and not already in use by a Customer Portal or partner portal. Furthermore, an error may occur if you name a Customer Portal "partner portal" Customer Portal</p>
Description	<p>A description of the partner portal as displayed on the portal's detail and edit pages. The description of the partner portal is not displayed in the portal.</p>
Login Enabled	<p>Allows users to log in to the partner portal.</p> <p>We recommend that you do not select this checkbox until you have completed configuring your portal.</p> <p> <b>Note:</b> When you enable the partner portal, the default portal is set as <code>Login Enabled</code>.</p> <p>Users must be able to log in to the partner portal, be within their user profile's restricted IP range, and be within designated Login Hours in order to be able to reset their passwords.</p>

### EDITIONS


Available in: **Salesforce Classic**

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

### USER PERMISSIONS

To modify partner portal settings:

- **Customize Application**

Setting	Description
Administrator	<p>Click the lookup icon (  ) to choose a default administrator for your partner portal. All email notifications regarding your partner portal will be sent to this Salesforce user.</p> <p>When choosing an administrator for your partner portal, you can only select users that have the “Manage External Users” and “Customize Application” user permissions, and have access to the Documents folder that contains your partner portal <a href="#">Header</a>. You cannot deactivate a user selected as a portal administrator.</p>

### Portal Default Settings

Setting	Description
Logout URL	The URL of the Web page that displays when users log out of the partner portal, for example, “http://www.acme.com.” If a logout URL is not specified, portal users return to the login page when they log out.
Show Action Confirmation	<p>Allows users to view confirmation messages after they complete an action in the partner portal. For example, after a user creates a lead in your partner portal, he or she views the message: “Lead has been created” if this setting has been enabled.</p> <p>Confirmation messages may help users clearly understand actions they have completed in your partner portal.</p>
HTML Messages Default Language	Specifies the language that portal HTML messages are displayed in when custom language portal HTML messages are not configured. This setting is only available for organizations that have multiple languages enabled.




### Email Notification Settings

Setting	Description
From Email Address	The email address from which all partner portal communication templates are sent, for example, “support@acme.com.” Salesforce sends the emails automatically, but they appear to portal users as if they were sent from this email address. If a portal user responds to a communication template, the response is sent to this address.
From Email Name	The name associated with the “From” Email Address, for example, “Acme Partner Support.”
New User Template	The email template used to send a username and initial password to all newly-enabled partner portal users. By default, a sample


### Email Notification Settings

Setting	Description
	template is automatically selected for you. This template must be marked as <code>Available for Use</code> .
New Password Template	The email template used to send a new password to existing partner portal users when you reset their passwords.
Lost Password Template	The email template used to send a new password to existing partner portal users when they reset their own passwords by clicking <b>Forgot your password?</b> on the login page of the partner portal.
Change Owner to Portal User Template	The email template used to send a notification to partner portal users when they become the new owner of a record in the portal.

### Look and Feel

Setting	Description
Header	<p>A text or HTML file that allows you to incorporate your organization's branding into the header of your partner portal. Click the lookup icon (  ) to choose a file that has been uploaded to a publicly accessible folder on the Documents tab.</p> <p>The files you include in the <code>Header</code> and <code>Footer</code> lookup fields can have a combined size of up to 10 KB.</p> <p>We recommend that you do not add a header <i>and</i> a logo to your portal because they may not display properly together.</p> <p>You can position the logout link anywhere on the header by using the HTML tag: "<code>&lt;a href="/secur/logout.jsp"&gt;Logout&lt;/a&gt;</code>".</p>
Footer	<p>A text or HTML file that allows you to incorporate your organization's branding into the footer of your partner portal. Click the lookup icon (  ) to choose a file that has been uploaded to a publicly accessible folder on the Documents tab.</p> <p>The files you include in the <code>Header</code> and <code>Footer</code> lookup fields can have a combined size of up to 10 KB.</p>
Logo	<p>An image file (.jpg, .gif, .png) that allows you to incorporate your organization's branding into the top left header of your partner portal. Click the lookup icon (  ) to choose a file that has been uploaded to a publicly accessible folder on the Documents tab and marked as an <code>Externally Available Image</code>.</p> <p>The file you include in the <code>Logo</code> lookup field can be up to 20 KB.</p>

**Look and Feel**


Setting	Description
	We recommend that you do not add a header <i>and</i> a logo to your portal because they may not display properly together.
Login Message	<p>A text or HTML file that allows you to incorporate your organization's branding into the header of the login page, forgot password page, and change password page of your partner portal. Click the lookup icon (🔍) to choose a file that has been uploaded to a publicly accessible folder on the Documents tab.</p> <p>The file you include in the <code>Login Message</code> lookup field can be up to 2 KB.</p> <p> <b>Note:</b> JavaScript and CSS code are automatically removed from HTML files used as the portal login message.</p>

5. Click **Save**.

SEE ALSO:

[Create a Partner Portal](#)

## Assigning Partner Profiles to Partner Portals

 **Note:** Starting in Summer '13, the partner-portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner-portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner-portals may continue to use their partner-portals or transition to Communities. Contact your Salesforce Account Executive for more information.

Portal users can only log into partner portal assigned to their profile. To assign a profile to a partner portal:

1. From Setup, enter `Partners` in the `Quick Find` box, then select **Settings**.
2. Select the name of your partner portal.
3. Click **Edit Profiles** in the Assigned Profiles section.
4. Select the `Active` checkbox next to the profile you want to assign to the portal.

A portal user can access all the partner portals assigned to his or her profile with one username and password.

You can view the number of active users associated with each profile assigned to a partner portal on the `Users` field on the Assigned Profiles section.

### EDITIONS

Available in: **Salesforce Classic**


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

### USER PERMISSIONS

To assign partner profiles to partner portals:

- **Customize Application**

## Setting Fonts and Colors for Your Partner Portal

 **Note:** Starting in Summer '13, the partner-portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner-portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner-portals may continue to use their partner-portals or transition to Communities. Contact your Salesforce Account Executive for more information.

You can customize the fonts and colors of the Salesforce partner portal to reflect your company's branding. Your portal's fonts and colors are specified in a portal "color theme." Select a predefined color theme and optionally, customize it to better match your branding. You can click the **See examples** link to see all of the theme attributes you can customize.

1. From Setup, enter *Partners* in the **Quick Find** box, then select **Settings**.
2. Select the name of your partner portal.
3. Click **Change Portal Fonts and Colors**.
4. Select a color theme from the **Color Theme** drop-down list. Select Custom from the **Color Theme** drop-down list to create your own theme from scratch. A preview of the color theme you select is automatically displayed in the Preview sections.
5. Optionally, customize the color of any theme you select by either:
  - Entering a hexadecimal value into any theme attribute, or
  - Clicking the hexadecimal value of any theme attribute and selecting a color from the point-and-click editor

When you customize a theme, it is automatically renamed **Custom** when saved. You can customize the following options, which when customized, automatically display in the Preview sections:

### Tab Styles

Theme Attribute	Description
Current Tab Text	Text color of the tab users have selected.
Current Tab Background	Background color of the tab users have selected.
Current Tab Border	Border color of the tab users have selected.
Other Tab Text	Text color of the tabs users have not selected.
Other Tab Background	Background color of the tabs users have not selected.
Other Tab Border	Border color of the tabs users have not selected.
Tab Bar Background	Background color behind all tabs.

### Page Styles

Theme Attribute	Description
Page Background	Portal background color, excluding search, related lists, recent items, solution categories, document folders, and the Create New drop-down list.

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To configure the fonts and colors for a partner portal

- Customize Application

## Page Styles

Theme Attribute	Description
Text	Text color, size, and font on all portal items, except for tabs, buttons, headers, and field labels.  Optionally, you can change the percent displayed in the percent field to increase or decrease the size of all portal items. Additionally, you can change the font of all portal items, except for tabs, buttons, headers, and field labels from the drop-down list.
Field Label Text	Text color of the field names on records. Optionally, you can change the font of the text from the drop-down list.
Link	Text color of all links.
Link Hover	Text color of all links when a user hovers the mouse over them.
Field Separator	Color of the lines that separate fields on records.
Bottom Border	Color of the line bordering the bottom of the portal.

## Section Styles

Theme Attribute	Description
Header Background	Background color of all headings, including search, recent items, related lists, solution categories, documents folders, and the selected tab.
Section Header Text	Text color and font on the headers of search, related lists, recent items, solution categories, and document folders.  Optionally, you can change the font of the text from the drop-down list.
Left Border	Border to the left of search, related lists, recent items, solution categories, document folders, and the Create New drop-down list. Optionally, you can change the number of pixels displayed in the pixel field to increase or decrease the thickness of the border. Additionally, you can select the style of the line displayed for the border from the drop-down list.
Right Border	Border to the right of search, related lists, recent items, solution categories, document folders, and the Create New drop-down list. Optionally, you can change the number of pixels displayed in the pixel field to increase or decrease the thickness of the border. Additionally, you can select the style of the line displayed for the border from the drop-down list.
Top Border	Border above search, related lists, recent items, solution categories, document folders, and the Create New drop-down

### Section Styles

Theme Attribute	Description
	list. Optionally, you can change the number of pixels displayed in the pixel field to increase or decrease the thickness of the border. Additionally, you can select the style of the line displayed for the border from the drop-down list.
Bottom Border	Border underneath search, related lists, recent items, solution categories, document folders, and the Create New drop-down list.  Optionally, you can change the number of pixels displayed in the pixel field to increase or decrease the thickness of the border. Additionally, you can select the style of the line displayed for the border from the drop-down list.
Section Background	Background color of search, related lists, recent items, solution categories, document folders, and the Create New drop-down list.

### List Styles

Theme Attribute	Description
List Header Text	Text color of the field names selected as column headings on list views. Optionally, you can change the font of the text from the drop-down list.
Header Underline	Color of the lines underneath column headings on related lists and list views.
Separator	Color of the lines between records on list views.
Row Highlight	Color of a record when a user hovers the mouse over it on list views.


- Click **Save** to save all changes to the theme values.



**Tip:** Changes are visible to partner portal users when they refresh their browsers. Therefore, we recommend updating your portal color theme at times when users are least likely to visit your partner portal.



## Customizing Your Partner Portal Tabs

 **Note:** Starting in Summer '13, the partner-portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner-portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner-portals may continue to use their partner-portals or transition to Communities. Contact your Salesforce Account Executive for more information.

In addition to custom objects, the following tabs can be displayed in the partner portal:

- Accounts
- Answers
- Articles (requires Salesforce Knowledge)
- Cases
- Contacts
- Documents
- Ideas
- Leads
- Opportunities
- Entitlements
- Service contracts
- Solutions
- Salesforce CRM Content tabs
- Reports

You can choose which tabs display to users logged in to a Salesforce partner portal, and customize the order in which tabs display to portal users:

1. From Setup, enter *Partners* in the **Quick Find** box, then select **Settings**.
2. Select the name of your partner portal.
3. Click **Customize Portal Tabs**.
4. To add or remove tabs, select a tab title, and click the **Add** or **Remove** arrow to add or remove the tab to or from the Selected Tabs box. To change the order of the tabs, select a tab title in the Selected Tabs box, and click the **Up** or **Down** arrow.
5. Optionally, from the **Default Landing Tab** drop-down, you can select which tab to display to users when they log into your portal.
6. Click **Save**.

You can further specify which tabs users can access by editing tab settings in users' associated profiles and permission sets.

The page layouts of tabs on the partner portal are controlled by the page layouts configured in the profiles assigned to the portal.

To edit the tab layouts for a profile:

1. From Setup, enter *Partners* in the **Quick Find** box, then select **Settings**.
2. Select the name of your partner portal.
3. Select the name of the profile you want to edit from the Assigned Profiles related list.
4. Click **View Assignment** under page layouts next to the standard or custom object you want to edit.

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS


To customize partner portal tabs:

- Customize Application

5. Click **Edit Assignment**.
6. Select a new page layout next to the profile name you are editing.
7. Click **Save**.

## Enabling Calendar and Events on the Home Tab


You can allow partner users to view a calendar and list of scheduled events on the Home tab of the partner portal. The calendar and events in the partner portal work the same as the calendar and events on the Home tab of Salesforce, with the following exceptions: spell check, event updates, enhanced list views, drag-and-drop scheduling, calendar sharing, and hover details are not supported in the partner portal.

-  **Note:** A partner user can only see calendars shared by:
- Other partner users assigned to the same account
  - The channel manager for their account

Portal users can view tasks and events from their calendar. Additionally, portal users with the “Edit Events” permission can create, edit, and delete events.

## Enabling the Welcome Component on the Home Tab

Include the Partner Portal Welcome component on home page layouts assigned to partner portal users. When users log in to your portal they receive a welcome message with their name, their channel manager’s name, and links to both their company and personal profiles. They can click the linked channel manager name to send an email to that person. When portal users change information about themselves their user record is automatically updated but their contact record is not.

-  **Note:** The Partner Portal Welcome component is also available for the Customer Portal home page, however, it only provides a welcome message with the user’s name.

## Allowing Portal Users to View the Reports Tab

To allow portal users to view the Reports tab:


1. Grant portal users access to the folders on your Salesforce Reports tab that contain the reports you want them to run.
2. Set the organization-wide default sharing model to Private on objects you want portal users to report on.
3. Grant the “Run Reports” permission to portal users.

When you add the Reports tab to your partner portal, portal users:

- Can run reports but cannot customize reports or filter report results.
- Can export reports to Excel if they have the “Export Reports” permission.
- Do not have access to the Unfiled Public Reports and My Personal Custom Reports folders.
- Receive an insufficient privileges error if they run a report that contains objects they do not have permission to view.

-  **Note:** The Reports tab is only available to partner users with Gold Partner licenses.

## Partner Portal Default Communication Templates

 **Note:** Starting in Summer '13, the partner-portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner-portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner-portals may continue to use their partner-portals or transition to Communities. Contact your Salesforce Account Executive for more information.

You can set default communication templates for your partner portals. Default communication templates will be used for partner communication unless you have specified templates for a particular portal. In addition, if a partner user is assigned to more than one portal, the default communication templates will be used when communicating with that user.

To set the default communication templates for the partner portal:

1. From Setup, enter *Partners* in the *Quick Find* box, then select **Settings**.
2. Click **Set Default Email Templates for All Portals**
3. Click **Edit**.
4. Set the following options:

### Email Notification Settings

Setting	Description
From Email Address	The email address from which all partner portal communication templates are sent, for example, "support@acme.com." Salesforce sends the emails automatically, but they appear to portal users as if they were sent from this email address. If a portal user responds to a communication template, the response is sent to this address.
From Email Name	The name associated with the "From" Email Address, for example, "Acme Partner Support."
New User Template	The email template used to send a username and initial password to all newly-enabled partner portal users. By default, a sample template is automatically selected for you. This template must be marked as <i>Available for Use</i> .
New Password Template	The email template used to send a new password to existing partner portal users when you reset their passwords.
Lost Password Template	The email template used to send a new password to existing partner portal users when they reset their own passwords by clicking <b>Forgot your password?</b> on the login page of the partner portal.
Change Owner to Portal User Template	The email template used to send a notification to partner portal users when they become the new owner of a record in the portal.

### EDITIONS

Available in: **Salesforce Classic**

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


### USER PERMISSIONS

To modify default partner portal communication templates:

- **Customize Application**

5. Click **Save**.

## Configure Multilingual HTML Messages for Partner Portals

 **Note:** Starting in Summer '13, the partner-portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner-portal, but want to easily share records and information with your partners, try Communities.


Existing organizations using partner-portals may continue to use their partner-portals or transition to Communities. Contact your Salesforce Account Executive for more information.

If your organization has multiple languages enabled, you can upload HTML messages in any of the languages supported by Salesforce and configure the messages to display in the portal based on portal user language settings. For example, you can upload an HTML message in French to display on the Home tab for portal users with French language settings, and an HTML message in English to display on the Home tab for portal users with English language settings.

Note the following before configuring multilingual HTML messages:

- Before you can add a multilingual HTML message to a portal, you must upload the HTML-formatted file in the Documents tab.
- Even if configured, portal HTML messages will not display on the Ideas, Reports, Content, or Solutions tabs.

To configure multilingual HTML messages:

1. To configure a display language for the partner portal, from Setup, enter *Partners* in the **Quick Find** box, then select **Settings**.
2. Click the name of the portal to edit.
3. Click **Add New Language** in the Assigned Languages related list.
4. Select a language from the **Language** drop-down list.
5. Click the lookup icon () next to a tab name, then select the HTML message to display on that tab. Optionally repeat this step for each tab that you want to display an HTML message.
6. Click **Save**.

### EDITIONS

Available in: Salesforce Classic

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


### USER PERMISSIONS

To configure languages in portals:

- **Customize Application**

## Partner Portal Advanced Configuration

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 **Note:** Starting in Summer '13, the partner-portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner-portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner-portals may continue to use their partner-portals or transition to Communities. Contact your Salesforce Account Executive for more information.

Once you have created a partner portal, you can customize it to meet your business needs. By customizing your partner portal, you can satisfy the needs of your various channels.

To customize your partner portal:

1. From Setup, enter *Partners* in the *Quick Find* box, then select **Settings**.
2. Click the name of the portal you wish to customize.
3. Configure the portal settings and communication templates.
4. Configure the fonts and colors used on the portal.
5. Configure the available tabs for the portal.
6. Assign partner profiles to the portal.
7. Configure portal languages.
8. Optionally, add the Partner Portal Welcome component to home page layouts assigned to portal users. The welcome component displays a welcome message with the user's name, their channel manager's name, and links to their company and personal profiles.
9. Optionally, add the Partner Portal Lead Inbox component to home page layouts assigned to portal users. When a user logs in to your portal, they see a list of leads for their lead queues. The user can click **Accept** next to a lead to take ownership of it; they won't see complete lead details until they click **Accept**.

SEE ALSO:

[Partner Portal Settings](#)

### EDITIONS

Available in: Salesforce Classic


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

### USER PERMISSIONS

To configure a partner portal:


- [Customize Application](#)

## Enable Cases in the Partner Portal

 **Note:** Starting in Summer '13, the partner-portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner-portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner-portals may continue to use their partner-portals or transition to Communities. Contact your Salesforce Account Executive for more information.

When you enable cases in the partner portal, you can [assign cases to partner users](#) directly or using assignment or escalation rules. Partner users can edit cases, create new cases, add case comments, reassign cases, find case solutions, and create case teams. Partner users cannot edit case comments, associate assets with cases, or delete cases.

 **Note:** Case comments added by partner portal users are public and can be viewed by any user that can view the case.

To enable cases in the partner portal:

1. Add the Cases tab to the list of [available tabs in the partner portal](#).
2. In the partner user profile, verify that the cases tab setting is set to `Default On`.
3. In the partner user profile, enable the "Read," "Create," and "Edit" object permissions for cases.

After enabling cases in the partner portal, consider the following tips:

- Specify a case creation template to allow partner users to send a notification email to new contacts assigned to cases. From Setup, enter *Support Settings* in the `Quick Find` box, then select **Support Settings**.
- Configure case team roles to allow your partners to add case team members. From Setup, enter *Case Team Roles* in the `Quick Find` box, then select **Case Team Roles**.
- When viewing an email associated with a case, **Email Message List**, **Next**, and **Previous** links are not available to portal users.

## Enabling Salesforce CRM Content in the Partner Portal

### USER PERMISSIONS

To set up and update the partner portal:	Customize Application
To create and edit profiles:	Manage Profiles and Permission Sets
To manage partner portal users:	Manage External Users
To create Salesforce CRM Content library permissions:	Manage Salesforce CRM Content OR Manage Content Permissions
To add users to a Salesforce CRM Content library:	Manage Salesforce CRM Content OR Manage Library checked in your library permission definition

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS


To enable cases for partner users:

- Manage Profiles and Permission Sets

### EDITIONS

Available in: Salesforce Classic

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

 **Note:** Starting in Summer '13, the partner-portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner-portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner-portals may continue to use their partner-portals or transition to Communities. Contact your Salesforce Account Executive for more information.


Salesforce CRM Content is available in the partner portal. Two levels of access to Salesforce CRM Content can be granted to partner portal users:

- Portal users without a Salesforce CRM Content feature license can download, rate, comment on, and subscribe to content if they have the "View Content on Portals" user permission. They cannot view potentially sensitive data such as usernames, download history, and version history. The content delivery feature is not available to portal users.
- Portal users with a Salesforce CRM Content feature license can access all Salesforce CRM Content features granted by their library permission(s), including contributing content, moving and sharing content among libraries, and deleting content. They can also view Salesforce CRM Content reports. The content delivery feature is not available to portal users.

## Enable Salesforce CRM Content for Non-Licensed Users

After you have [enabled the partner portal](#), complete the following steps to enable Salesforce CRM Content in your portals. Use these steps if you have not purchased Salesforce CRM Content feature licenses for your portal users.

1. Update your cloned Partner User profiles:
  - a. Include the "View Content on Portals" user permission.
  - b. Change the tab visibility for the Libraries, Content, and Subscriptions tabs from Tab Hidden to Default On.
  - c. Assign the updated profile to partner portal users as needed.
2. Determine what privileges your portal users will have in each Salesforce CRM Content library by creating one or more library permissions.
 



 **Note:** A library permission can only grant privileges that a user's feature license or profile permits. For example, even though `Tag Content` is a library permission option, selecting it does not allow portal users without a Salesforce CRM Content feature license to tag content.
3. Determine which libraries you want your portal users to have access to. Ensure that confidential content is not available in these libraries.
4. Add portal users to libraries. Portal users with the Partner User profile or a clone of that profile can only be added to a library as part of a public group.
5. [Add the Salesforce CRM Content tabs](#) to each partner portal.

 **Note:** The Documents tab is not part of Salesforce CRM Content.


## Enable Salesforce CRM Content for Licensed Users

After you have [enabled the partner portal](#), complete the following steps to enable Salesforce CRM Content in your portals. Use these steps if you have purchased Salesforce CRM Content feature licenses for your portal users.

1. Update your cloned Partner User profiles:
  - a. Optionally, add the "Create Libraries" user permission if you want to allow portal users to create and administer new libraries.
  - b. Change the tab visibility for the Libraries, Content, and Subscriptions tabs from Tab Hidden to Default On.

- c. Assign the updated profile to partner portal users as needed.
2. Select the `Salesforce CRM Content User` checkbox on the user detail page for each partner portal user.
3. Determine what privileges your portal users will have in each Salesforce CRM Content library by creating one or more library permissions.
  -  **Note:** A library permission can only grant privileges that a user's feature license or profile permits. For example, even though `Tag Content` is a library permission option, selecting it does not allow portal users without a Salesforce CRM Content feature license to tag content.
4. Determine which libraries you want your portal users to have access to. Ensure that confidential content is not available in these libraries.
5. Add portal users to libraries. Portal users with the Partner User profile or a clone of that profile can only be added to a library as part of a public group.
6. [Add the Salesforce CRM Content tabs](#) to each partner portal.
  -  **Note:** The Documents tab is not part of Salesforce CRM Content.

## Enabling Email in the Partner Portal

-  **Note:** Starting in Summer '13, the partner-portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner-portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner-portals may continue to use their partner-portals or transition to Communities. Contact your Salesforce Account Executive for more information.

Enabling email in the partner portal allows partner users to send email from Activity History related lists in the partner portal. For example, a partner user can click the `Send An Email` button in the Activity History related list on a lead to send an email to the lead and log the email in the related list.

To allow partner users to send email from the partner portal, grant them the "Send Email" permission. For partner users to use email templates, you must make the templates available to them.

### EDITIONS

Available in: Salesforce Classic

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


### USER PERMISSIONS

To enable permissions:

- Manage Profiles and Permission Sets



## Enable Ideas in the Partner Portal


 **Note:** Starting in Summer '13, the partner-portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner-portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner-portals may continue to use their partner-portals or transition to Communities. Contact your Salesforce Account Executive for more information.

After you set up your partner portal, follow the steps below to enable ideas in your portal:

1. To create an ideas community that's active and configured to be displayed in the portal, from Setup, enter *Ideas Zones* in the *Quick Find* box, then select **Ideas Zones**.
2. [Add the Ideas tab to your partner portal.](#)
3. If your organization has the Ideas and Answers Portal license, hide the Reports tab in the partner portal. Otherwise, your partner portal users receive an Insufficient Privileges message when they click the Reports tab.

## Enabling Entitlement Management in the Partner Portal


 **Note:** Starting in Summer '13, the partner-portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner-portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner-portals may continue to use their partner-portals or transition to Communities. Contact your Salesforce Account Executive for more information.

You can use the partner portal to provide your partners with access to entitlements, service contracts, or contract line items.

After you have set up entitlement management and enabled a partner portal, complete the following steps to add entitlement management to your portals.

1. Update your cloned Partner User profiles:
  - a. Include the "Read" permission on entitlements, service contracts, or contract line items.
  - b. Optionally, on the profiles of [delegated partner user administrators](#), include the "Create" and "Delete" permissions on entitlement contacts. This lets delegated external user administrators update entitlement contacts.
  - c. Verify that the tab visibility for the Entitlements or Service Contracts tabs are Default On. Contract line items display on service contracts.
2. At the bottom of the partner portal detail page, click **Edit Profiles** and activate the new profile.
3. Customize case page layouts to add the `Entitlement Name` lookup field. This lets partner users add entitlements to cases.

 **Tip:** *Don't* add the following entitlement process fields to case page layouts for portal users because portal users shouldn't access information related to your internal support processes: `Entitlement Process Start Time`, `Entitlement Process End Time`, `Stopped`, and `Stopped Since`.

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To set up and update the partner portal:

- Customize Application

To create a community:

- Customize Application

### EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Service Cloud

### USER PERMISSIONS

To set up and update the partner portal:

- Customize Application

To create and edit profiles:


- Manage Profiles and Permission Sets

To manage portal users:

- Manage External Users

4. Optionally, customize related lists on accounts and contacts to add Entitlements. This lets delegated external user administrators create cases automatically associated with the right entitlements.
5. Add the Entitlements or Service Contracts tabs to each partner portal.
6. Assign the cloned profiles to your partner portal users:
  - a. To create a new partner portal user, click **Manage External User** and choose **Enable Partner User** on the contact detail page. To update an existing user, click **Manage External User** and choose **View Partner User**.
  - b. For a new user, select the cloned profile from the **Profile** drop-down menu. For an existing user, click **Edit** and then select the profile.
  - c. Click **Save**.

## Enabling Answers in the Partner Portal

 **Note:** Starting in Summer '13, the partner-portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner-portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner-portals may continue to use their partner-portals or transition to Communities. Contact your Salesforce Account Executive for more information.

You can use the partner portal to provide your partners with access to an answers community.

To enable answers in your portal.

1. Set up your partner portal.

When customizing your portal fonts and colors, note that answers only supports the following changes:

- All tab styles
- The following page styles:
  - Page Background
  - Text
  - Link
  - Link Hover

2. Set up answers, making sure that your answers community is configured to display in the partner portal.
3. Add the Answers tab to your partner portal.
4. Create partner portal users.
5. If you want your partner portal users to have different category group visibility settings than the account owner, change the visibility settings for the partner portal user.

By default, partner portal users inherit which categories they can access from the account owner. For example, if the account owner has a role of CEO and the CEO role has full access to all the data categories in the category group assigned to answers, then partner portal users can also access all categories in the answers community. In some cases, you may want to limit which categories a partner portal user can access.

6. If your organization has the Ideas and Answers Portal license, hide the Reports tab in the partner portal. Otherwise, your partner portal users receive an Insufficient Privileges message when they click the Reports tab.

### EDITIONS

Available in: **Salesforce Classic**

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

### USER PERMISSIONS

To set up and update the partner portal:

- **Customize Application**


To create and edit profiles:

- **Manage Profiles and Permission Sets**

To create an answers community:

- **Customize Application**

## Enabling Partner Users to Request Meetings

 **Note:** Starting in Summer '13, the partner-portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner-portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner-portals may continue to use their partner-portals or transition to Communities. Contact your Salesforce Account Executive for more information.

After you enable your partner portal and set up the Request a Meeting feature, complete the following steps to let your Partner users request meetings with contacts, leads, and person accounts:

1. Update your custom Partner User profiles:
  - a. Include the "Send Email" and "Edit Events" user permissions.
  - b. Verify that the tab visibility for the Contacts and Leads tabs is Default On.
2. Ensure that the custom Partner User profile is active and assigned to your Partner users.

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To set up and update the partner portal:

- Customize Application


To create and edit profiles:

- Manage Profiles and Permission Sets

To set up the request a meeting feature:

- Customize Application

# WORKING WITH PARTNER USERS

 **Note:** Starting in Summer '13, the partner-portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner-portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner-portals may continue to use their partner-portals or transition to Communities. Contact your Salesforce Account Executive for more information.

Channel managers are associated with the partner users they manage by partner account ownership. A channel manager who owns a partner account can access all the information and manage all the activities of the partner users associated with that account.

Some common tasks when managing your partner users include:

- [Creating a partner account](#)
- [Managing partner users](#)
- [Disabling and deactivating partner users](#)
- [Assigning leads to partner users](#)
- [Assigning events to partner users](#)
- [Assigning cases to partner users](#)
- [Tracking partner activity](#)
- [Enabling partner users to request meetings](#)

In addition, here are some other ways you can work with your partner users:

## **Enable partner super user access**

Partner super users have access to data owned by all partner users and partner super users in the same role and those below them in the portal account hierarchy, even if the organization-wide default setting is Private. Partner super user access applies to cases, leads, custom objects, and opportunities only.

## **Assign tasks to partner users**

If your partner users have the appropriate field-level security settings, they can view and create activities related to leads or opportunities.

Add tasks to leads or opportunities to remind your partner users of particular tasks you would like them to perform. You can view the activity history for a particular lead or opportunity, or use reports to track activities assigned to partner users.

Partner users can only assign tasks to other users in their partner account or to their channel manager.

## **Use notes and attachments to communicate with partner users**

Partner users can create, view, and edit notes and add attachments from the Notes and Attachments related list on selected detail pages, including lead, solution, and opportunity detail pages. You can use notes and attachments to share documents or information with partner users. If Chatter is enabled for your organization, feed attachments are included in the Notes and Attachments related list. Portal users can download feed attachments, but can't preview, edit, or delete them.

The size limit for an attached file is 5 MB.

## EDITIONS

Available in: Salesforce Classic

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

**Click Log in to Portal as User to troubleshoot**

When you view the contact detail page for a partner user, you can click **Manage External User**, then **Log in to Portal as User**. This opens a new browser window and logs you into the portal as the partner user. Click this button to troubleshoot any issues partner users are experiencing. You may also click this button to ensure that your portal is configured appropriately. The **Log in to Portal as User** button is only available if you have the “Manage External Users” permission and one of the following: the “Modify All Data” permission or you are the partner account owner or higher in the role hierarchy. The **Log in to Portal as User** button does not display if you do not meet these requirements, or if the portal user is inactive.

**Reset a partner user's password**

When you view the user detail page for a partner user, you can click **Reset Password** to reset the partner user's password.

Partner users can reset their own password by clicking **Forgot Password?** on the partner portal login page.

**Expose a solution in the portal**

Select `Visible in Self-Service Portal` on the solution.

**Add products to opportunities**

If the Products related list is available to partner users on opportunities, then you can add products to the opportunities for your partners.

## Assigning Leads to Partner Users

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**Note:** Starting in Summer '13, the partner-portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner-portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner-portals may continue to use their partner-portals or transition to Communities. Contact your Salesforce Account Executive for more information.

A vital piece of partner relationship management is lead assignment. Your partners can only work with leads that are assigned to them. There are two ways to handle lead assignment for partner users:

- Assign each lead to an individual partner user
- Assign leads to a lead queue and allow partner users to claim leads from the queue

In addition, you can create lead assignment rules that automatically assign leads to partner users or queues based on certain properties of those leads.



**Note:** Assignment rules cannot be triggered by actions in the portal.

Assigning a lead to a partner user or partner lead queue is just like assigning a lead to any other user or queue.

Leads assigned directly to a user or a queue that is not part of the lead pool are shown on the portal Leads tab. The partner user can see these by selecting an appropriate list view. Until a partner user has reviewed a lead, it displays in bold, and is in the My Unread Leads list view.

If a lead is assigned to a queue that is in the lead pool, the lead displays in the [Available Leads list](#) on the Home tab of the portal.



**Tip:** Assign partner leads to a single partner user (for example, a sales manager) in the partner account to enable that person to manage lead assignment for the partner users in that account.

### EDITIONS

Available in: Salesforce Classic


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

### USER PERMISSIONS

To assign leads to partners:

- Edit on leads

## Assigning Cases in the Partner Portal

 **Note:** Starting in Summer '13, the partner-portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner-portal, but want to easily share records and information with your partners, try Communities.


Existing organizations using partner-portals may continue to use their partner-portals or transition to Communities. Contact your Salesforce Account Executive for more information.

Before you can assign cases to partner portal users, you must [configure cases for partner users](#). In addition to the required user permissions for this feature, you must have access to view the cases you're updating.

To assign a case to a partner user:

1. On the case detail page, click **[Change]** next to the `Case Owner` field.
2. Select Partner User from the Owner drop-down list and enter the name of the partner user.
3. Optionally, select the `Send Notification Email` checkbox to send an email to the new owner.
4. Click **Save**.

The partner user will be able to view and edit the case from the partner portal.

 **Note:** Case comments added by partner portal users are public and can be viewed by any user that can view the case.

You can also create case assignment rules and escalation rules that automatically assign cases to partner users or queues based on certain properties of those cases.

### EDITIONS

Available in: Salesforce Classic


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

### USER PERMISSIONS

To assign cases to partners:


- Edit on cases
- AND
- Transfer Cases or Transfer Record

## Using Calendars in the Partner Portal

 **Note:** Starting in Summer '13, the partner-portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner-portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner-portals may continue to use their partner-portals or transition to Communities. Contact your Salesforce Account Executive for more information.

If you have added the calendar to the Home page layout for partner portal users, you can assign events to them, and partner portal users with the "Edit Events" permission can create and edit their own events. Note that the following event and calendar features are not supported in the partner portal: spell check, event updates, enhanced list views, drag-and-drop scheduling, calendar sharing, and hover details.

 **Note:** A partner user can only see calendars shared by:

- Other partner users assigned to the same account
- The channel manager for their account

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To assign events to partners:

- Edit Events

## Report on Partners

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Some opportunities involve partner relationships. Use this report to identify and analyze those relationships.

To report on all partnerships or primary partnerships within opportunities:

1. From the Reports tab, choose the Partner Opportunities report.
2. Choose **Customize** to change the report and view only primary partner relationships. Add a field filter where *Primary equals 1*.

In any other opportunity report, when you customize the report to display the Partner column, only the primary partner displays.

You can also run the Partner Accounts report to analyze the partnerships of your accounts.

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS


To report on partners:

- Read on accounts or opportunities

AND

Run Reports

# PARTNER PORTAL BEST PRACTICES

 **Note:** Starting in Summer '13, the partner-portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner-portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner-portals may continue to use their partner-portals or transition to Communities. Contact your Salesforce Account Executive for more information.

## EDITIONS

Available in: Salesforce Classic


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

## Implementation Tips

- Portal users can only log into partner portals assigned to their profile.  
A portal user can access all the partner portals assigned to his or her profile with one username and password.  
You can view the number of users associated with each profile assigned to a partner portal on the `Users` field on the Assigned Profiles section.
- The login URL of each partner portal you create contains a unique identifier, such as `portalId=060D00000000Q1F`. You can find this identifier on the portal detail page. The unique identifier determines the specific portal a user can access. If a user accesses a login URL that does not contain a unique identifier, they are automatically directed to the login URL of the first partner portal you created. Note that portal users can only log into a partner portal using the portal's login page and not through the Salesforce login page.
- The settings on the following items apply to both your organization *and* your partner portals:
  - List views
  - Search layouts
  - Workflow alerts

## Best Practices

- Because you can uniquely customize the fonts, colors, email templates, and login message of each partner portal you create, you can build a partner portal for each partner organization supported by your organization, or for different partner tiers or communities.

 **Note:** JavaScript and CSS code are automatically removed from HTML files used as the portal login message.


- You cannot delete a partner portal, but you can prevent users from logging into a portal by deselecting the `Login Enabled` checkbox.
- You can create multiple partner portals that display different tabs for users with the same profile, as long as the profile has access to each object displayed on a tab.
- You can set the default number of roles for partner portal accounts. This benefits your partner portal by reducing the number of unused roles.
- When you enable the partner portal, the default portal will be set as `Login Enabled`. Disable that setting, and re-enable it when the default portal is ready for partner users to login.



## Partner Portal Best Practices


- Let your partner users know they can make their channel manager the owner of an object.
- Create a home page layout for your partner users with custom links to frequently used features.
- Include the Partner Portal Welcome component on home page layouts assigned to partner portal users. When users log in to your portal they receive a welcome message with their name, their channel manager's name, and links to both their company and personal profiles. They can click the linked channel manager name to send an email to that person. When portal users change information about themselves their user record is automatically updated but their contact record is not.
- Customize the Custom Links home page component to include links that your partner users can use, or remove it from the home page layout.
- Partner users cannot set reminders on tasks. Create a process to help them manage their tasks without reminders.
- You can add the [Partner Portal Lead Inbox component](#) on home page layouts assigned to partner portal users. We recommend hiding important lead fields, such as `Company Name` and `Lead Name`, from partner portal users so that they don't selectively choose which leads to accept.

# TRACKING PARTNER ACTIVITY

 **Note:** Starting in Summer '13, the partner-portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner-portal, but want to easily share records and information with your partners, try Communities.


Existing organizations using partner-portals may continue to use their partner-portals or transition to Communities. Contact your Salesforce Account Executive for more information.

Tracking partner activity is important to ensure that your leads and opportunities are being managed effectively. Using the `Partner Account` field on leads and opportunities, you can create custom reports and list views that help you track the work partner users are doing.

 **Tip:** When creating a list view or report, to include all leads or opportunities associated with a partner account, use "Partner Account not equal to" and leave the third field in the filter blank.

Tips for tracking partner user activity:

- Create list views to indicate partner lead and opportunity activity during the last week.
- Create a dashboard showing the number of leads created in the last week that are owned by partners.
- Create a list view of leads assigned to partners that have not been updated recently.
- Create forecast reports on partner user opportunities.
- Use the lead `Last Transferred Date` field to search for leads that have not been acted upon in a timely fashion.
- If you are using customizable forecasting, assign a user as a forecast manager for each partner role in your forecast hierarchy. Assigning someone as a forecast manager means that all forecasts from users below that user in the forecast hierarchy roll up to that person.

 **Note:** When you transfer portal users between accounts, the portal users' roles are updated, so when you transfer a partner user to another account:

- Opportunities on each account are recalculated through your Salesforce org's forecast hierarchy.
- Opportunities that the partner user owns remain in the previous account.

## EDITIONS

Available in: Salesforce Classic

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

## USER PERMISSIONS

To create custom list views:

- Read on the type of record included in the list


To create, edit, save, and delete reports:

- Run Reports
- AND
- Read on the records included in reports
- AND
- Create and Customize Reports

To create, edit, and delete dashboards:

- Manage Dashboards

# ABOUT MOBILE ACCESS FOR PARTNER USERS

 **Note:** Starting in Summer '13, the partner-portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner-portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner-portals may continue to use their partner-portals or transition to Communities. Contact your Salesforce Account Executive for more information.

You can enable your partner users to view and modify partner portal data on their BlackBerry®, iPhone®, or Treo® devices using the Salesforce Mobile Classic client application. By granting mobile access to your partner users, you provide them with the flexibility to access their partner portal data from any location, at any time.

Due to memory and screen size limitations of mobile devices, Salesforce Mobile Classic uses data sets, or subsets of Salesforce data, to determine the information that is available to mobile users. Partners using Salesforce Mobile Classic will only be allowed to view objects they are able to view in the partner portal, even if Salesforce Mobile Classic is configured with data sets that are less restrictive. Conversely, access to partner portal data can be limited by configuring more restrictive Salesforce Mobile Classic data sets.

## EDITIONS

Available in: Salesforce Classic

Available for an additional cost in: **Enterprise** and **Unlimited** Editions

## Configuring Salesforce Mobile Classic Access for Partner Users

**Important:** On December 1, 2017, Salesforce Mobile Classic will be removed from the App Store and Google Play, and access to currently installed Salesforce Mobile Classic apps will be immediately disabled for all users and orgs. For more information about the retirement of Salesforce Mobile Classic and your transition options, see [Salesforce Mobile Classic App to Retire on December 1, 2017](#) and join the conversation in this [group](#) in the Trailblazer Community.

**Note:** Starting in Summer '13, the partner-portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner-portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner-portals may continue to use their partner-portals or transition to Communities. Contact your Salesforce Account Executive for more information.

You can allow partner users to access partner portal data on mobile devices using the Salesforce Mobile Classic app.

Tips for setting up Salesforce Mobile Classic access for partner users:

- Before setting up Salesforce Mobile Classic for partner users, you must configure partner user accounts and purchase mobile licenses for each partner portal user that will be using Salesforce Mobile Classic. Partner user profiles must be assigned to at least one active partner portal before partner users can use Salesforce Mobile Classic. If a user profile is assigned to multiple partner portals, only the first assigned partner portal will be accessible using Salesforce Mobile Classic.
- Custom mobile list views don't affect list views in the partner portal.
- If you make User data sets available in the Salesforce Mobile Classic app, partners can assign objects to their partner account users and all internal users. If you don't make User data sets available, partners can only assign objects to internal or partner account users who are associated with records that you've made available on the mobile device.

### EDITIONS

Salesforce Mobile Classic setup available in: both Salesforce Classic and Lightning Experience

Mobile app available in: **Performance, Unlimited, and Developer** Editions for orgs created prior to Winter '17

Mobile app available for an extra cost in: **Professional and Enterprise** Editions for orgs created prior to May 1, 2016

Mobile app not available for orgs created in Winter '17 or later

### USER PERMISSIONS

To view Salesforce Mobile Classic configurations, data sets, mobile devices, and users:

- View Setup and Configuration

To create, change, or delete Salesforce Mobile Classic configurations and data sets, test mobile configurations, edit mobile object properties, and manage mobile custom views:

- Manage Mobile Configurations

# PARTNER PORTAL LIMITS

Limits for partner portals.

## Maximum number of partner portals

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You can create a maximum of 5 partner portals in your organization. Increases to that number are subject to product manager approval and require detailed use cases.

## Maximum number of portal roles

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The default number of roles used in an org's portals or communities is 5000. This limit includes roles associated with all of the organization's customer portals, partner portals, or communities. To prevent unnecessary growth of this number, we recommend reviewing and reducing the number of roles. You can also delete unused roles. Contact customer support to increase your number of roles. If you require 100,000 roles or more, please contact your Salesforce account representative.

### EDITIONS

Available in: Salesforce Classic

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

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