



AC Partner Co-Branding User Guide



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Prerequisites

AC Partner Co-Branding app is a tool for your community that allows your partners to generate different types of marketing assets using their company details.

Documents, presentations and email templates can be automatically generated from the vendor-provided templates (pdf, pptx, docx) using the partner company details and assets such as logos and images.

To start using the application, please make sure the following features are enabled and set up in your Salesforce organization:

1. Communities should be enabled on your org (Setup - Community Settings).
2. You should have My Domain set and deployed to users (Setup - My Domain)
3. You should have the AccountBrand object enabled. For that, you need at least one partner community license.



Installation and Configuration

Install the AC Partner Co-Branding app from the Appexchange (<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N4V00000G5zhVUAR>)

Set Up Permissions

We recommend the following object and field-level permissions.

Organization-Wide Defaults (Default External Access):

Account - Private

Account Brand - Public Read Only

Account Co-Branding Templates - Public Read Write

Account Co-Branding Template Folders - Public Read Only

Administrator Permissions:

App permissions (Assigned Apps)

AC Partner Co-Branding (accobr_AC_Partner_CoBranding)(Lightning) - visible

Tab settings

Accounts - Default On

Account Brands - Default On

Account Co-Branding Templates - Default On

Account Co-Branding Template Folders - Default On

Partner Permission:

Delegated External User Administrator (for the user profile that creates and edits account brands) - enabled

▼ Partner Relationship Management		
Permission Name	Enabled	Description
Delegated External User Administrator	☒ 	Manage portal users who belong to the same portal account.
IP Restrict Requests	☐	Restrict what IP addresses can access in the PRM Portal.

Object and Field-Level Permissions

	Administrator	Partner
Account		Read
Contact		Read
Account Brand	Read, Create, Edit, Delete	Read, Create, Edit
Company Name	Read, Edit	Read, Edit
Email	Read, Edit	Read, Edit
Name	Read, Edit	Read, Edit
Phone	Read, Edit	Read, Edit
Website	Read, Edit	Read, Edit
Account Co-Branding Templates	Read, Create, Edit, Delete	Read
Account Co-Branding Template Folder	Read, Edit	Read
Description	Read, Edit	Read
Image Placeholders	Read, Edit	Read
Source Filename	Read	Read
Template Name	Read, Edit	Read
Account Co-Branding Template Folder	Read, Create, Edit, Delete	Read

Account Co-Branding Template Folder Name	Read, Edit	Read
Document Generation Request	Read, Edit, Delete	Read, Create, Edit
Account	Read, Edit	Read, Edit
Account Co-Branding Template	Read, Edit	Read, Edit
Document Download	Read	-
Selected Placeholders	Read, Edit	Read, Edit
Status	Read, Edit	Read, Edit

Alternatively, assign users one of the Permission Sets that come with the package:

- **AC Co-Branding Admin**
- **AC Co-Branding Partner**

Apex Classes Access

According to the Salesforce access restriction to @AuraEnabled Apex Methods for Guest and Portal Users, provide access for external users (including guests) to the following Apex Classes:

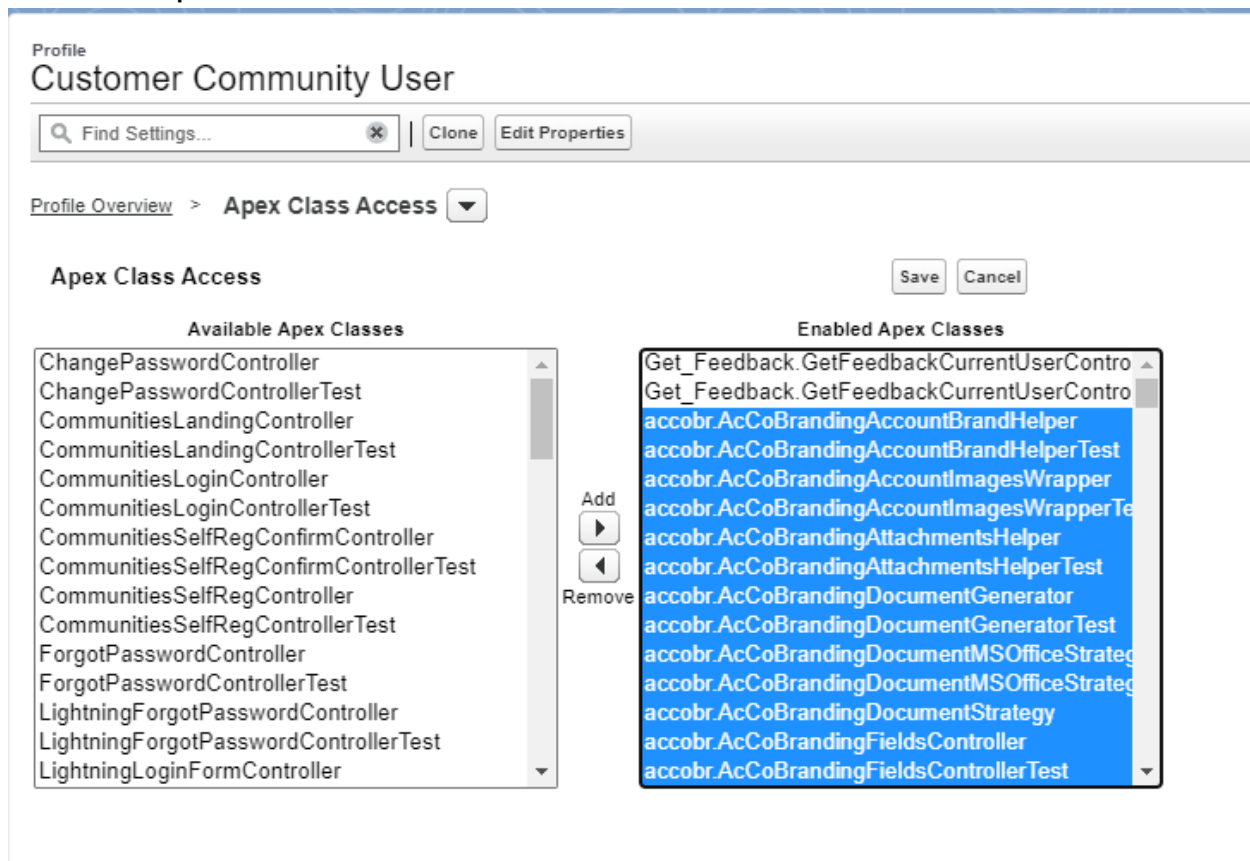
AcCoBrandingAccountBrandHelper
 AcCoBrandingAccountImagesWrapper
 AcCoBrandingAttachmentsHelper
 AcCoBrandingEmailController
 AcCoBrandingFieldsController
 AcCoBrandingImagesController
 AcCoBrandingLightningLimitEmail
 AcCoBrandingTemplateController
 AcCoBrandingTemplatesController
 AcCoBrandingTemplateWrapper
 AcCoBrandingUtils
 CoBrandingDocumentGenerateCtrl
 CoBrandingMiddleWareService
 CoBrandingMwFilesPreviewModalCtrl

To set Apex class security from a profile:

1. From Setup, enter Profiles in the Quick Find box, then select **Profiles**.

We recommend using the Enhanced Profile User Interface to see the full list of available Apex classes!

2. Select a profile.
3. In the Apex Class Access page or related list, click **Edit**.
4. Select the Apex classes that you want to enable from the Available Apex Classes list and click **Add**.



The screenshot shows the 'Profile: Customer Community User' page. Under the 'Apex Class Access' tab, there are two lists: 'Available Apex Classes' and 'Enabled Apex Classes'. The 'Available Apex Classes' list includes various controllers and tests. The 'Enabled Apex Classes' list includes a selection of classes related to 'accobr.AcCoBranding'. The 'Add' button is visible between the two lists.

Custom Metadata Types Access

AC Partner Co-Branding uses Custom Metadata Types. To make this data visible for users on the community, provide them with the read access to the following custom metadata types:

accobr.Account Co-Branding Template Field

Only users with Customize Application permission can provide access to custom metadata types.

To grant a profile or permission set read access to a custom metadata type:

1. Go to the profile or permission set that you want to grant access to.
2. Under Enabled Custom Metadata Type Access, click **Edit**.
3. Add the custom metadata type to the list of enabled custom metadata types.

Profile
Customer Community User

Find Settings... Clone Edit Properties

Profile Overview > Custom Metadata Types

Custom Metadata Types Save Cancel

Available Custom Metadata Types		Enabled Custom Metadata Types
acknowltn.AC Knowledge Setting bookmp.Setting Resource Reservation breac.AC E-commerce Country breac.AC E-commerce Settings breac.AC E-commerce Shipping Rate breac.AC E-commerce State breac.AC E-commerce Tax Rate breac.AC E-commerce Wide Slide bugtr_mp.Bug_Tracker_Setting bugtr_mp.Known Issue Setting mman_mp2.AC Member Directory Admin Filter mman_mp2.API Key mman_mp2.Admin Filters Value mman_mp2.Country mman_mp2.State	Add Remove	accobr.Account Co-Branding Template Field

VisualForce Pages Access

- 1) Search for the **Visualforce Page Access** section in the Guest User profile.
- 2) Click **Edit**, add mentioned custom visualforce pages to the **Enabled Visualforce Pages**, then click **Save**.

CoBrandingDocumentGenerate
AcCoBrandingPreview

Profile

Customer Community Login User

[Profile Overview](#) > **Visualforce Page Access**

Visualforce Page Access

Available Visualforce Pages

ForgotPassword

ForgotPasswordConfirm

IdeasHome

InMaintenance

MyProfilePage

SiteLogin

SiteRegister

SiteRegisterConfirm

SiteTemplate

StdExceptionTemplate

Unauthorized

UnderConstruction

accobr.CoBrandingDocumentDownloadRedirect

accobr.CoBrandingTemplateUpload

bre.acStripePayment

Add

Remove

Enabled Visualforce Pages

accobr.CoBrandingDocumentGenerate

acknowltnng.KnowledgeSettings

acpoll.VotingManager

bookmp.ResourceReservationSetting

bre.BrEventsImageUpload

bre.BrEventsSettings

bre.BrRecaptcha

bre.CustomLabelsDummy

brec.brEcommerceSettings

brec.brRecaptcha

brec.brStripePayment

bugtr_mp.brBugTrackerAdminSettings

mman_mp2.AC_LocationSettingsPage

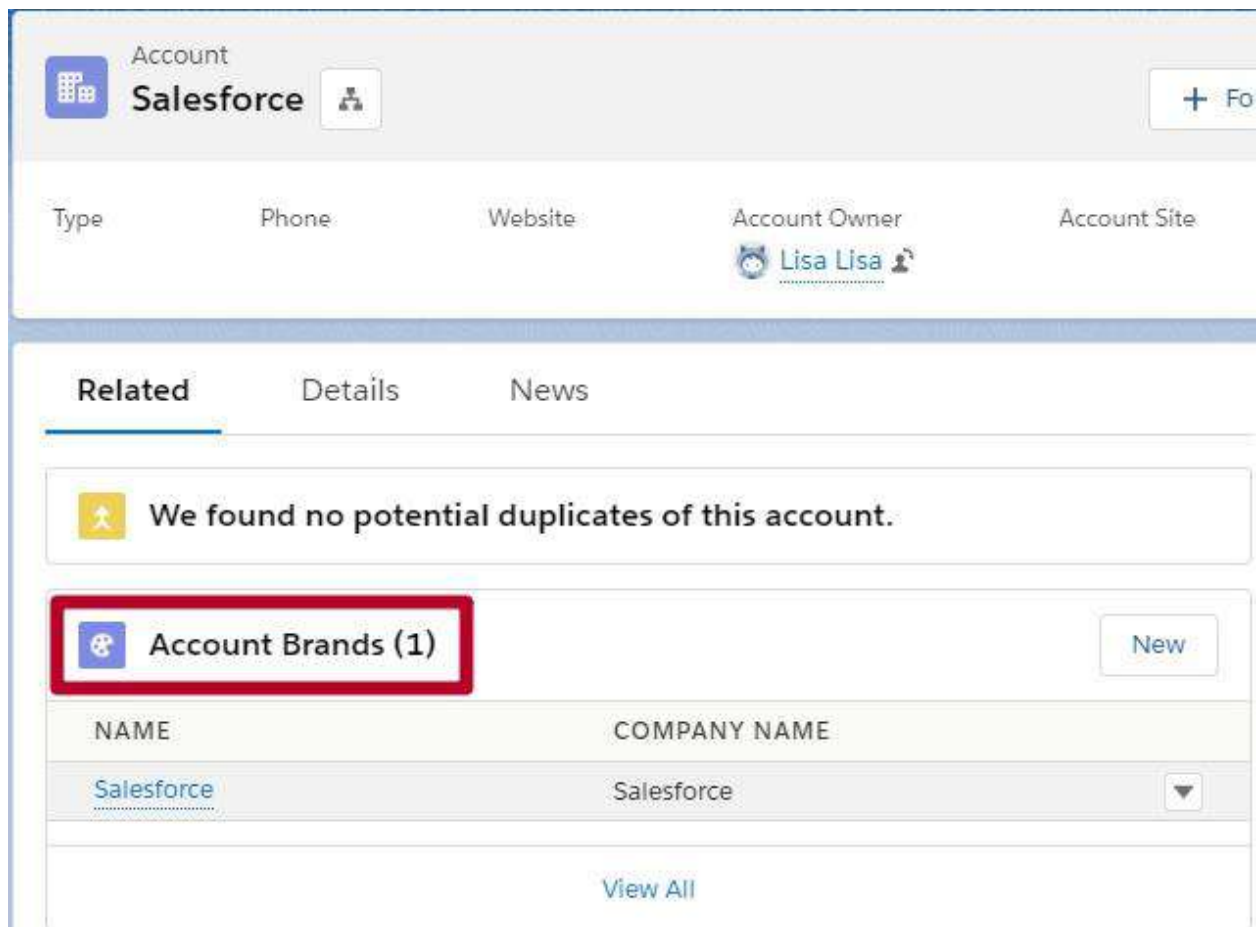
mman_mp2.AC_UserDirectorySettingsPage

npe01.BTN_MatchingDonation

Set up and Manage Account Brands

Account Brand - is a standard object where partner brand information is stored and displayed in the Community within the Branding tab. Channel managers can access this page to create co-branded emails, marketing campaigns and websites.

1. Add the **Account Brand** related list to **Accounts** to provide partner users access to company brand information.



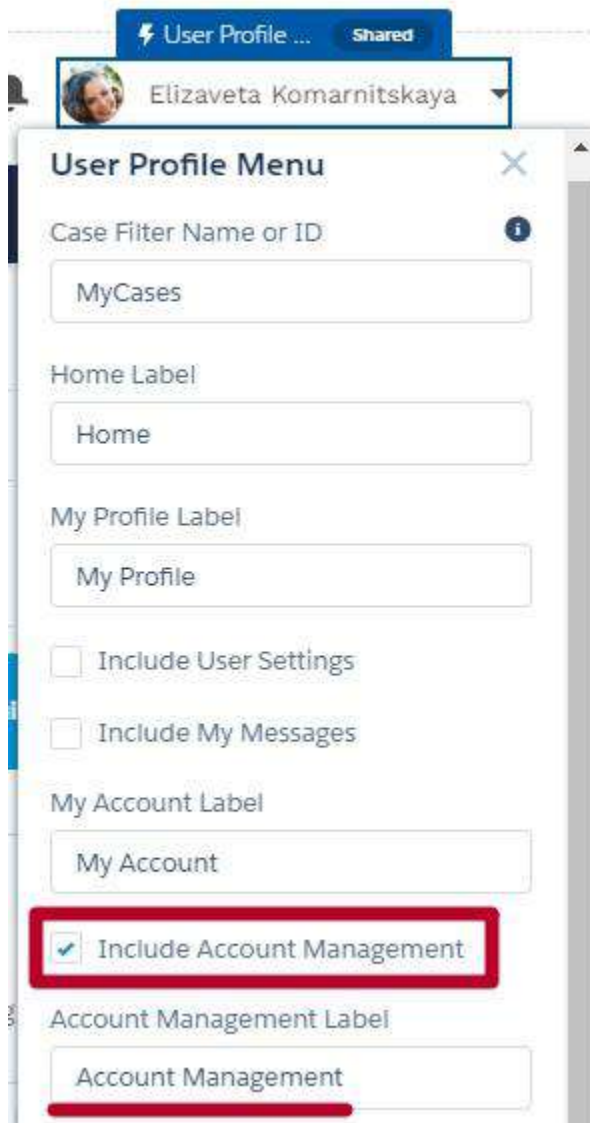
The screenshot shows the Salesforce interface for an Account. The top header includes the Account name 'Salesforce' and a user profile 'Lisa Lisa'. Below the header, there are tabs for 'Related', 'Details', and 'News'. The 'Related' tab is selected, and a message states 'We found no potential duplicates of this account.' Below this, a red box highlights the 'Account Brands (1)' related list. The list contains one entry with the columns 'NAME' and 'COMPANY NAME', both showing 'Salesforce'. A 'View All' link is visible at the bottom of the list.

NAME	COMPANY NAME
Salesforce	Salesforce

2. Grant **Delegated External User Administrator** permission to users with Partner Community, Customer Community Plus, Gold Partner,

Enterprise Administration, and Customer Portal Manager licenses who will create and manage Account Brands information.

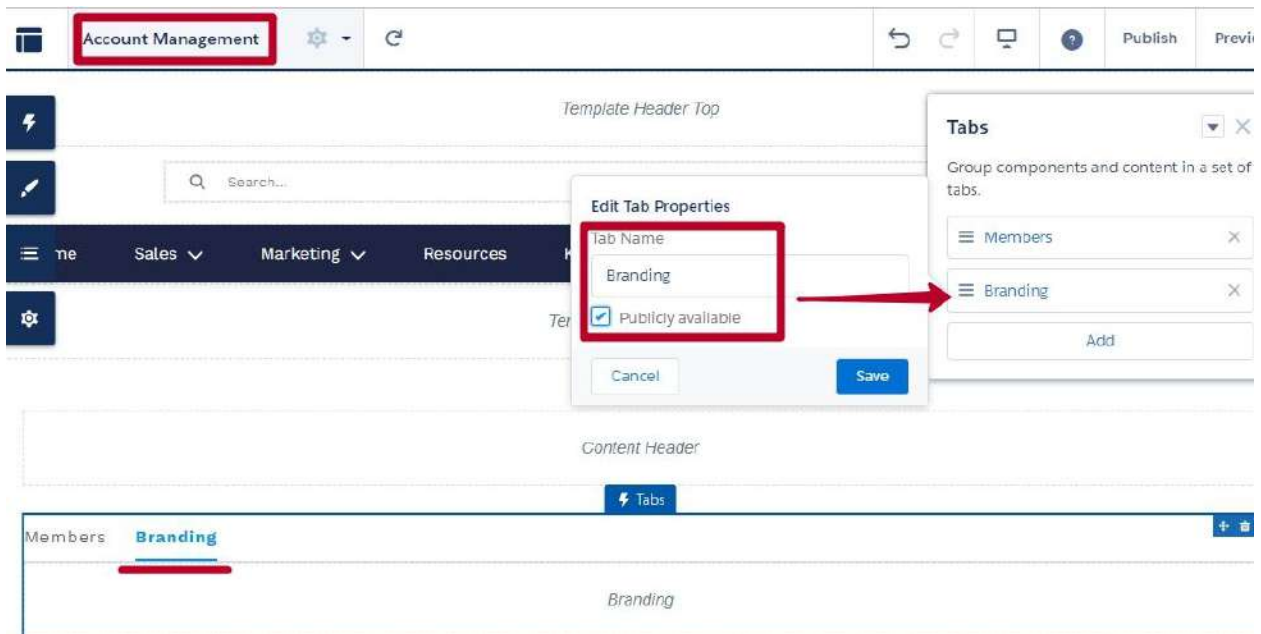
3. Enable **Include Account Management** on the community builder User profile menu component settings. Select this option for all community page types (home, default, etc.).



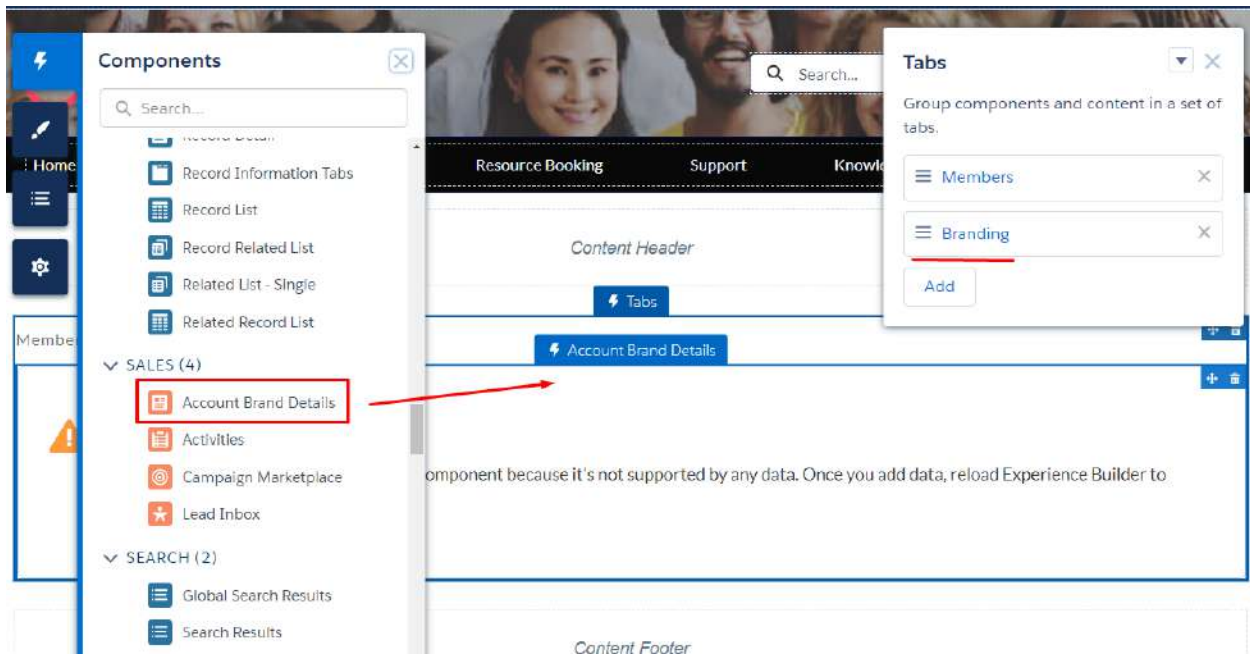
The screenshot shows the 'User Profile Menu' settings for a user named Elizaveta Komarnitskaya. The settings include:

- Case Filter Name or ID: MyCases
- Home Label: Home
- My Profile Label: My Profile
- ☐ Include User Settings
- ☐ Include My Messages
- My Account Label: My Account
- ☒ Include Account Management (highlighted with a red box)
- Account Management Label: Account Management

4. In the Community Builder, choose the Account Management page from the list of pages. Add a new tab called **“Branding”**.



5. Add the **Account Brand Detail** component!



6. Provide the `{!CurrentUser.accountId}` in the Properties box.

Account Management

Account Brand Details

Account Id

{!CurrentUser.accountId}

Members

Branding

Account Brand Details

Account Brand

Brand Details

Name

LinkedIn

Level

Silver

Account

LinkedIn

Channel Program Level

Brand Assets

About

LinkedIn is a business and employment-oriented service that operates via websites and mobile apps. Founded on December 28, 2002, and launched on May 5, 2003, it is mainly used for professional networking, including employers posting jobs and job seekers posting their CVs.

Logo

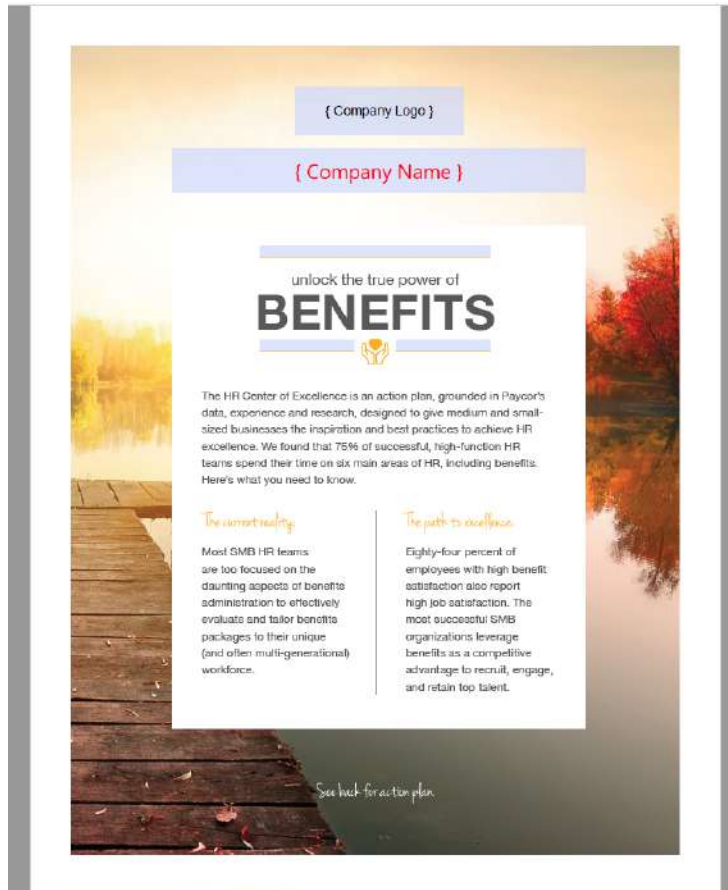
Без названия (1)



Company Details

Account Co-Branding Templates and Folders

Create branded templates using the following formats: pdf, docx or pptx.



You should be using the following format for the field names in the templates: **[#COMPANYNAME]** - for the correct field mapping with Account Brand information.

To share this template with community members and let them generate a template with their own branding assets, do the following:

1. Create a new "Account Co-Branding Template" record in your SF org via the Account Co-Branding Template tab.

New Account Co-Branding Template

Information

*Template Name

HR Benefits One-page Template

Owner

Lisa Jones

Description

some

Source Filename

Images Placeholders

CompanyLogo(150*75)

Account Co-Branding Template Folder

HR Templates

Cancel

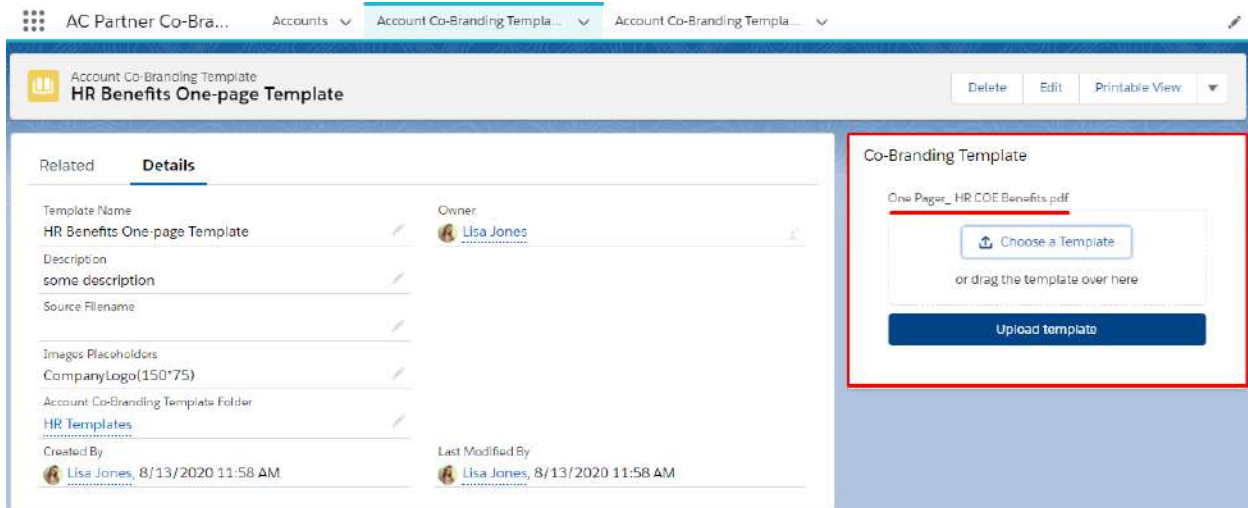
Save & New

Save

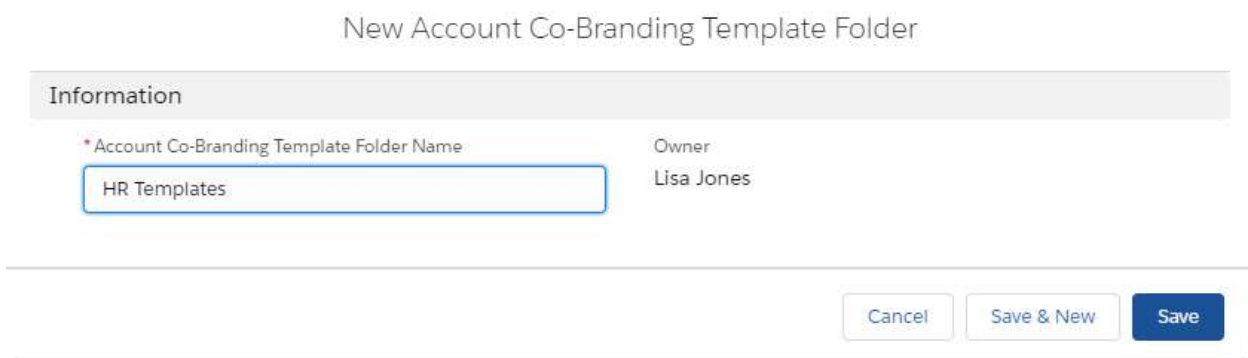
- Add a Template Name and optionally a Description
- If the template has placeholders for images, specify them in the Images Placeholders field using the format: imgPlaceholder1 (width*height), imgPlaceholder2 (width*height)
- Specify an Account Co-Branding Template Folder to save a template in or create a new one

The Source Filename field will be auto-filled after you download the template.

2. Upload the template into the lightning component "Manage Template".



Organize Account Co-Branding Templates in special folders by creating them via the Account Co-Branding Templates Folders tab.



The documents/templates generated by partners are saved in the Generate Document Request custom object, that you can see in the Account Co-Branding Template related list. Requests to re-generate a template are not saved in order to reduce the number of created generation request records.


Account Co-Branding Template
HR Benefits One-Pager Template

Related

Details


Files (0)

Add Files

Upload Files

Or drop files


Document Generation Requests (1)

Document Generation Reques...	Account	Document Download
000000000	Edge Communications	Download

View All

Account Brand Fields Configuration

You can configure account brand fields that will be used and mapped within the generated documents.

Go to Setup - Custom Metadata, and click "Manage Records" next to the Account co-Branding Template Filed. Create New.

Setup Home Object Manager

metad

Custom Code

Custom Metadata Types

Didn't find what you're looking for?
Try using Global Search.

Account Co-Branding Template Field

Account Co-Branding Template Field Edit

Save Save & New Cancel

Information

Label Address

Account Co-Branding Template Field Name Address

Field API Name Address_Street__c

Placeholder [#address]

Save Save & New Cancel

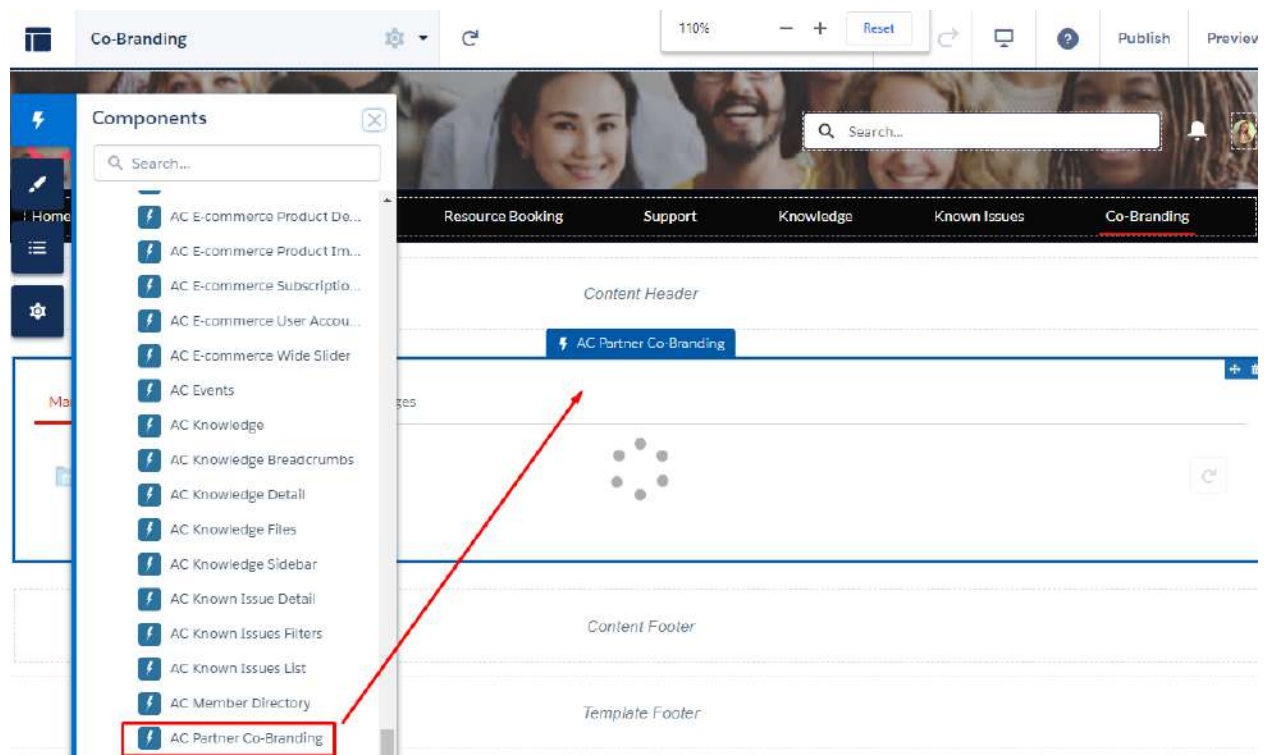
- 1) Add a Label and Template Field Name
- 2) Copy the appropriate field API Name from the Account Brand object
- 3) Enter the name of a Placeholder from the Template

That's it.

Set Up Community Page

In the Community Builder, create a new standard page and add it to the navigation menu or add a new tab into the Account Management page.

Choose the “AC Partner Co-Branding” component from the list of components and drag it to the page.



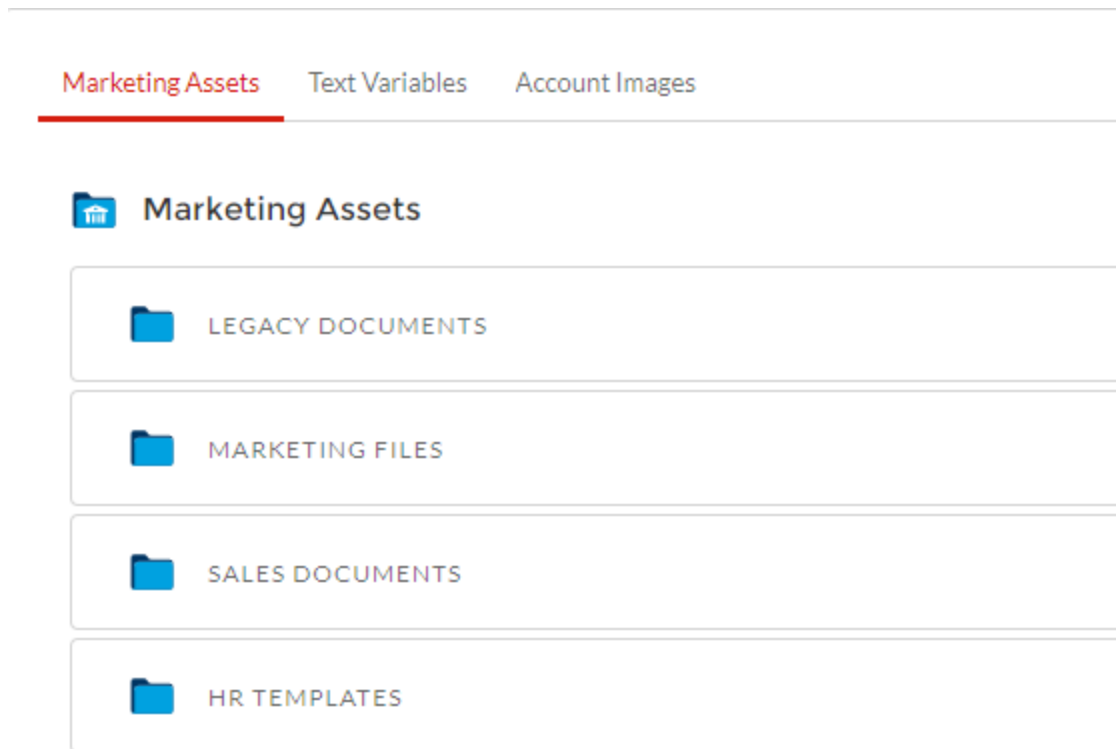
No additional configuration is required for the component.

Note! The component works only for community users with a related contact and account.

Partner Use Case

Once you have completed the set-up, partners with configured Account Brand information will be able to access the AC Partner Co-Branding app via the community and to generate documents with their own branding.

- 1) See the list of folders and available documents and templates in the Marketing Assets subtab.



- 2) Use Text Variables to check and edit the Account Brand fields information.

Marketing Assets **Text Variables** Account Images

Account Brand Fields Configuration Edit

[#COMPANYNAME]	AC
[#EMAIL]	ac@gmail.com
[#NAME]	AC
[#PHONE]	+123456789
[#WEBSITE]	[#Website]

Save Cancel

3) View and upload more Account Images to use for the templates if necessary.

Marketing Assets Text Variables **Account Images**

Account Images

Upload Account Images

Upload Files Or drop files




Choose the appropriate template in the Marketing Assets folders. Click on the Preview button to see the template.

Marketing Assets Text Variables Account Images

HR



HR BENEFITS ONE-PAGER TEMPLATE



New

Generate



Click the “Generate” button to generate a new document with your branding assets. Open the gallery to choose a placeholder Image.

Placeholders

CompanyLogo (150*75)

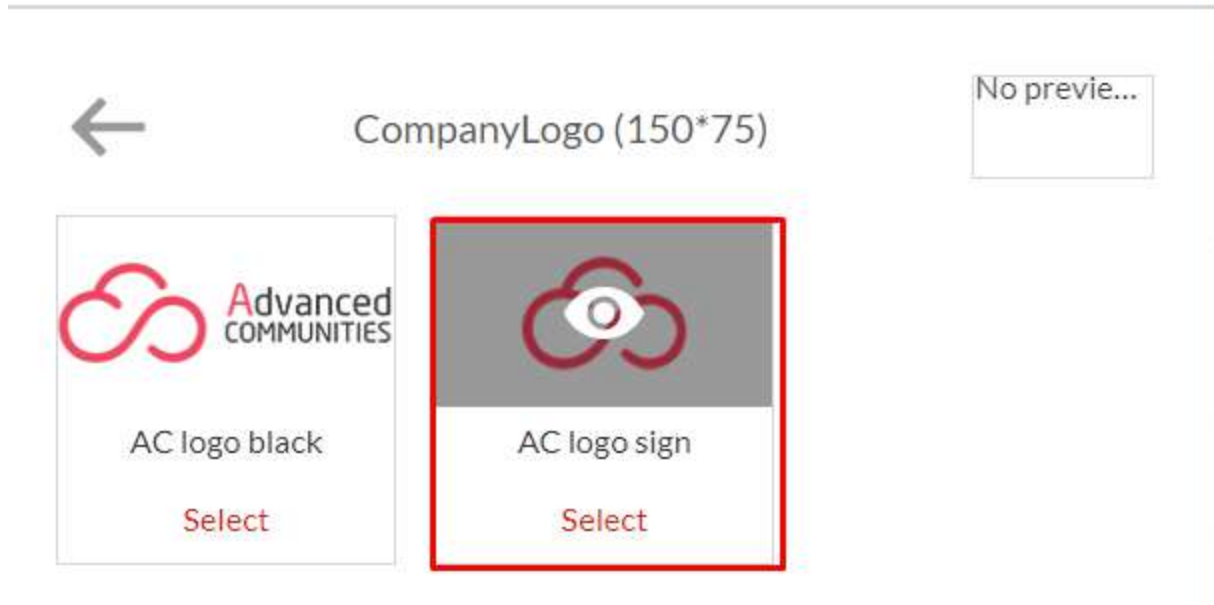


No preview...

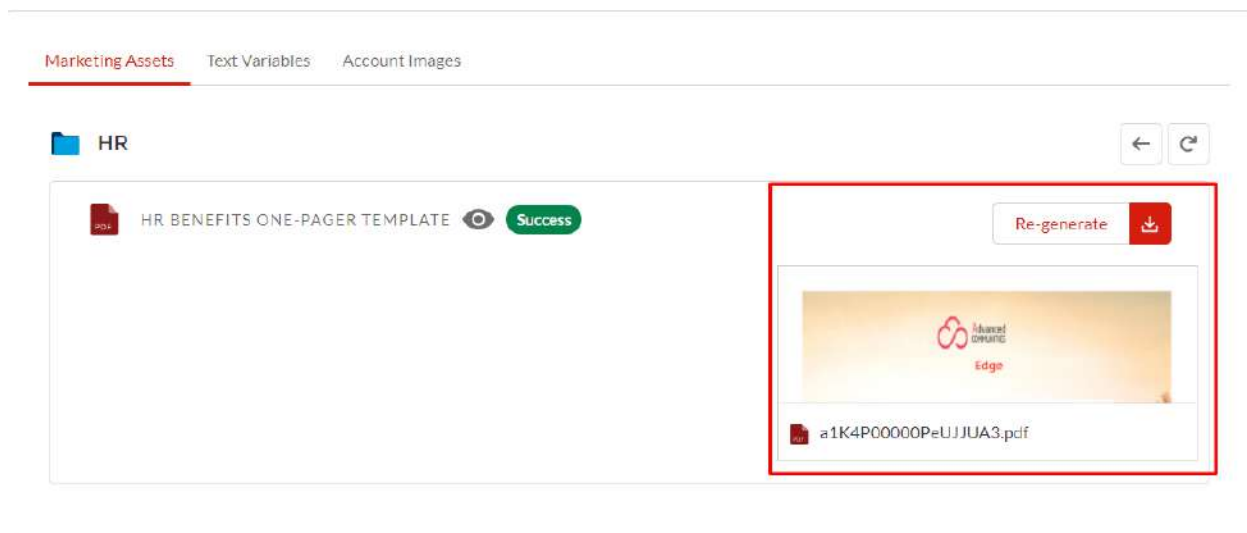
Open gallery

Preview and select an image. Click “Generate”.

Placeholders



When the template has been generated successfully, you will see the status “Success”. You can also preview the generated document and download it.



The partner may also re-generate the document if the partner has changed Placeholder Image or the Text Variables.



Get in Touch

AC Partner Co-Branding is created and maintained by [AdvancedCommunities.com](https://advancedcommunities.com) - Community Cloud experts.

We specialize in Community Cloud customization, development and consulting.

Feel free to contact us regarding anything related to Community Cloud.

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