

Partner Listing User Guide

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ADMIN USERGUIDE

Post Installation Steps

When the installation of SIPL CEP is completed, you are now ready to move forward with the **Post Installation Steps**

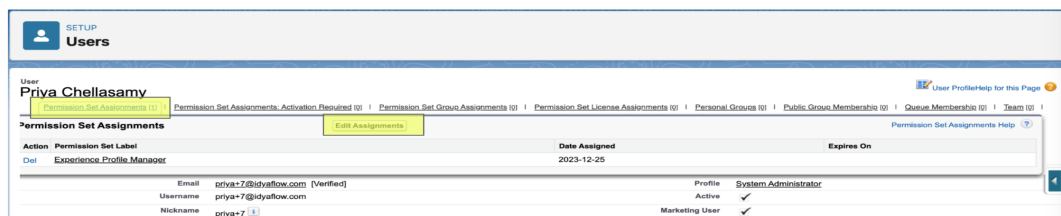
Additional Help

For Additional information regarding how to install an AppExchange application, see the [salesforce.com Help page](https://help.salesforce.com).

Step A – Permission Sets

Assign “SIPL Administrator” Permission Set

- From Setup, navigate to:
- Lightning: Setup | Users | Click on your User.
- Classic: Setup | Users | Click on your System Administrator User
- Find the Permission set related List

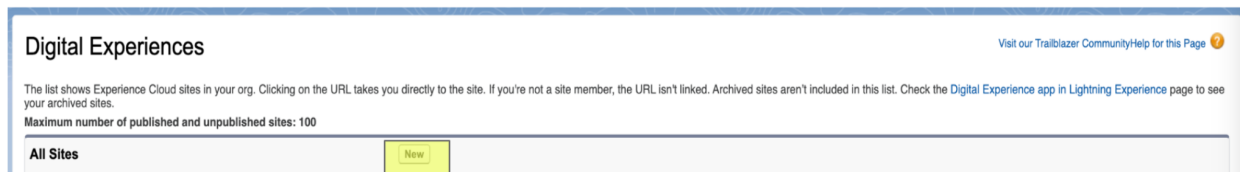


- Add IdyaFlow Marketplace RW Permission Set and Save

Step B – Create Digital Experience

Activate and add components to layout.

- Setup → Feature Settings → Digital Experience → All Sites → **New**



- Select **Build Your Own** (LWR) option.
- Populate the **Name** field with “Your Partner Listing Name” and click **Create**.
- Go to **Administration**
- Click on **Activate**.
- Click on **Preferences**. Select options highlighted below to allow guest user access. Click **Save**

Preferences

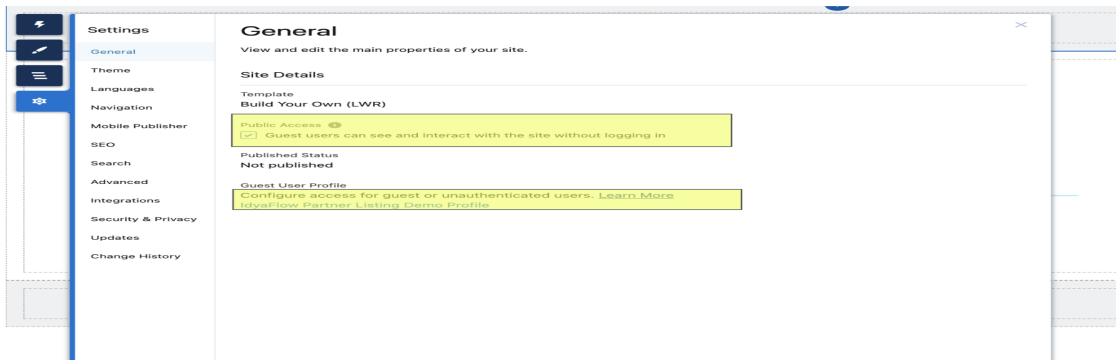
General

- ☒ Show nicknames 
- ☒ Allow guest users to access public APIs 
- ☒ Let guest users view asset files, library files, and CMS content available to the site (To let guest users view CMS collections, also enable Allow guest users to access public APIs) 
- ☒ Cache public data from Apex methods in Managed Packages 
- ☐ See other members of this site 
- ☐ Ask your Salesforce admin to enable Site User Visibility in your org's sharing settings.
- ☐ Let guest users see other members of this site 

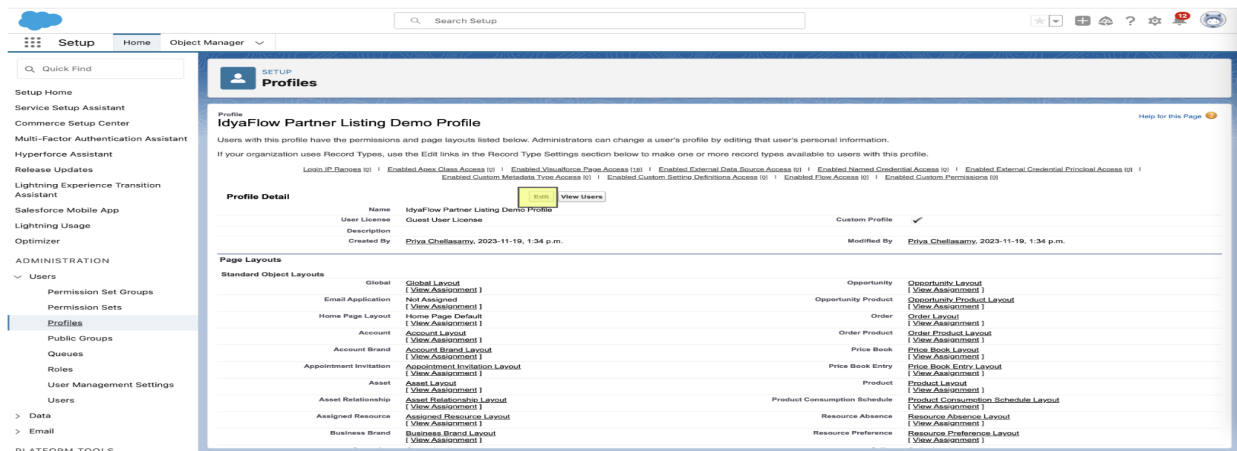
Update Guest User Permissions and Sharing Settings

- Click on **Administration** → **Builder**
- Go to **Settings** → **General** → Check **Public Option**

- Select **IdyaFlow Partner Listing Demo Profile** on a **New Tab**



- Click on the **Edit**



- Scroll down to **Tab Settings** and Select the following tabs to “default ON”
 - All Sites
 - CMS Channels
 - CMS Workspaces
 - Digital Experiences Home
- Scroll down to **Custom Object Permissions** and Select **Read Permissions for Partners, Reviews, and Services objects** → **Save** changes
- Click on **Enabled Apex Class Access** and Click **Edit**

SETUP Profiles

Profile
IdyaFlow Partner Listing Demo Profile

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges (0) | **Enabled Apex Class Access (0)** | Enabled Visualforce Page Access (16) | Enabled External Data Source Access (0) | Enabled Named Credential Access (0) | Enabled External Credential Principal Access (0)

Enabled Apex Class Access [Edit](#) [Enabled Apex Class Access Help](#)

No Apex Classes enabled

User License: Guest User License Custom Profile: ☒

Description:

Created By: Priya Chelliasamy, 2023-11-19, 1:34 p.m. Modified By: Priya Chelliasamy, 2023-11-19, 5:07 p.m.

- Select **IDFC Apex Classes** as below and Click Save

Enable Apex Class Access

Select the Visualforce pages that you want to make accessible at this Salesforce site.

[Save](#) [Cancel](#)

Available Apex Classes

- ChangePasswordController
- CommunitiesLandingController
- CommunitiesLoginController
- CommunitiesSelfRegConfirmController
- ForgotPasswordController
- LightningForgotPasswordController
- LightningLoginFormController
- LightningSelfRegisterController
- MicrobatchSelfRegController
- MyProfilePageController
- SiteLoginController
- SiteRegisterController

Add
Remove

Enabled Apex Classes

- IFDC.IFDCPartnerController
- IFDC.IFDCURLUtils

- Click on **Enabled Custom Metadata Type Access** and Click **Edit**

SETUP Profiles

Profile
System Administrator

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges (0) | **Enabled Apex Class Access (16)** | Enabled Visualforce Page Access (20) | Enabled External Data Source Access (0) | Enabled Named Credential Access (0) | Enabled External Credential Principal Access (0) | **Enabled Custom Metadata Type Access (0)** | Enabled Custom Settings Definitions Access (0) | Enabled Flow Access (0) | Enabled Service Presence Status Access (0) | Enabled Custom Permissions (0)

Enabled Custom Metadata Type Access [Edit](#)

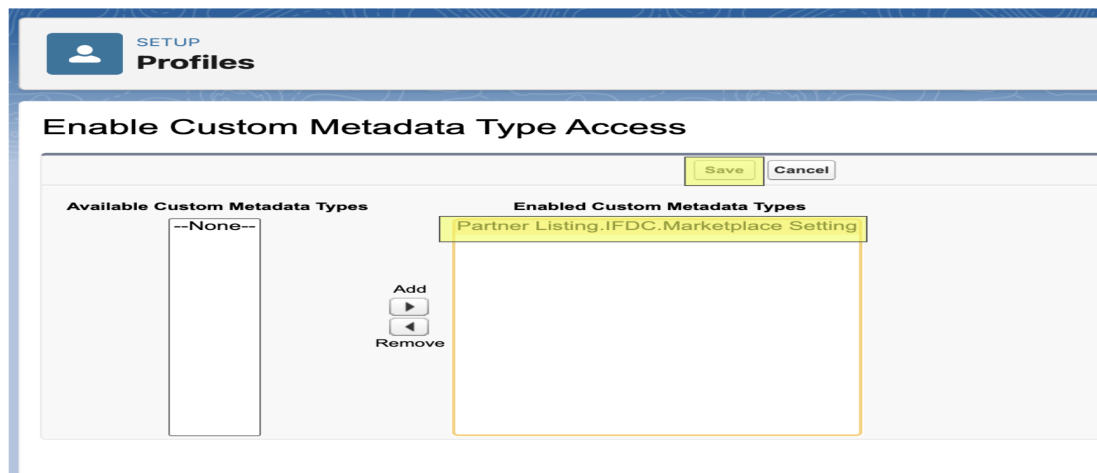
No Custom Metadata Types enabled

Created By: salesforce.com, Inc., 2024-01-09, 6:36 p.m. Modified By: Priya Chelliasamy, 2024-01-09, 9:45 p.m.

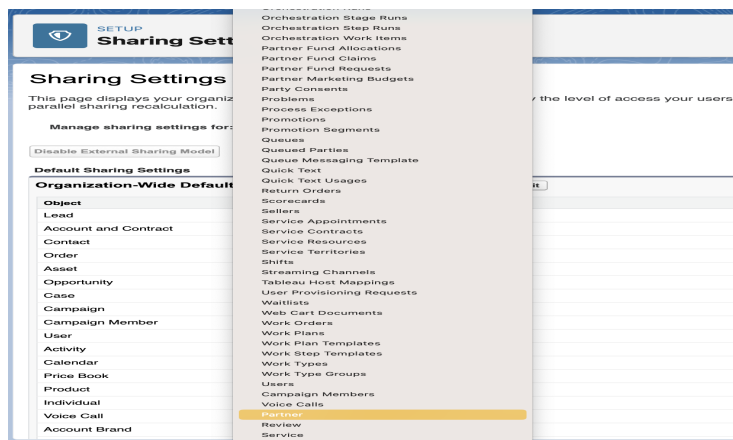
Page Layouts

Standard Object	Layout	Standard Object	Layout
Global	Global Layout (View Assignment)	Macro	Macro Layout (View Assignment)
Email Application	Not Assigned (View Assignment)	Object Milestone	Object Milestone Layout (View Assignment)
Home Page Layout	DE Default (View Assignment)	Operating Hours	Operating Hours Layout (View Assignment)
Account	Account Layout (View Assignment)	Opportunity	Opportunity Layout (View Assignment)
Account Brand	Account Brand Layout (View Assignment)	Opportunity Product	Opportunity Product Layout (View Assignment)
Alternative Payment Method	Alternative Payment Method Layout (View Assignment)	Order	Order Layout (View Assignment)
Appointment Invitation	Appointment Invitation Layout (View Assignment)	Order Product	Order Product Layout (View Assignment)
Asset	Asset Layout (View Assignment)	Payment	Payment Layout (View Assignment)
Asset Action	Asset Action Layout (View Assignment)	Payment Authorization	Payment Authorization Layout (View Assignment)
Asset Action Source	Asset Action Source Layout (View Assignment)	Payment Authorization Adjustment	Payment Authorization Adjustment Layout (View Assignment)
Asset Relationship	Asset Relationship Layout	Payment Gateway	Payment Gateway Layout

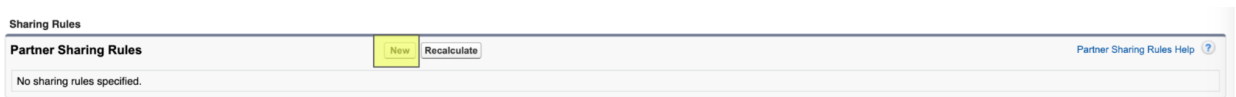
- Add **Partner Listing.IFDC.Marketplace Settings** and Click **Save**



- From Setup, navigate to: **Setup | Settings | Security | Sharing Settings**.
- Select **"Partner"** from the Manage sharing settings for drop-down



- Create the below sharing rules



- Create the below **sharing rules** to allow access to partner records

Step 1: Rule Name

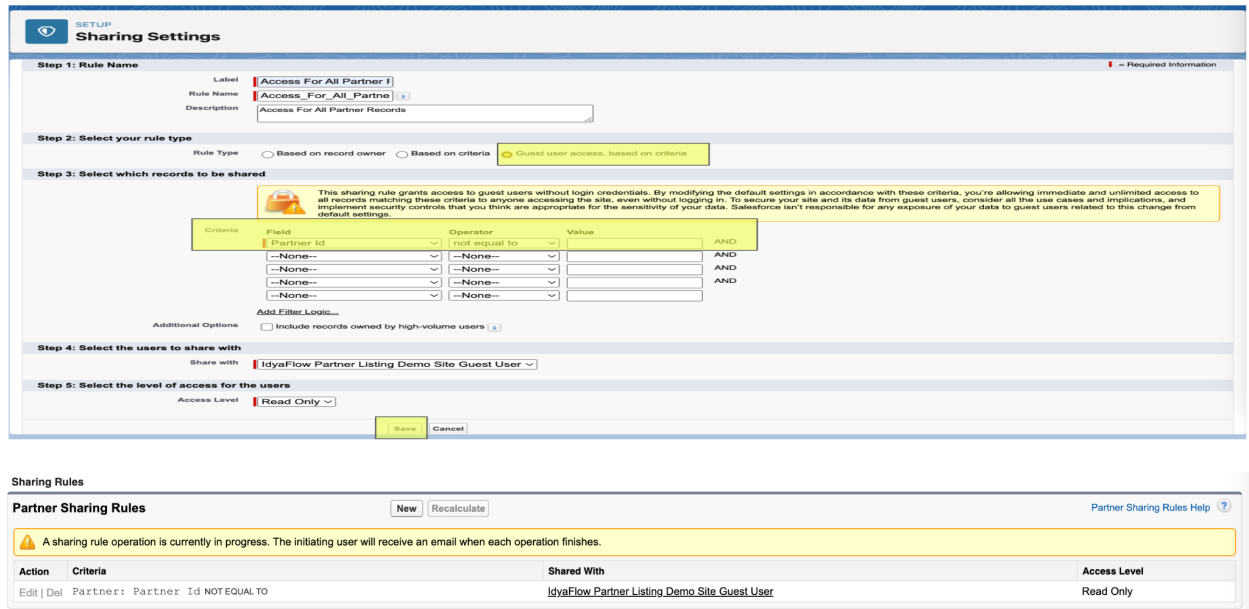
Name: Access For All Partner Records

Rule Name: Automatically filled

Description: Access For All Partner Records

Step 2: Rule Type: Guest User Access, based on criteria

Step 3: Select which records to be shared: Select “Partner Id” not equal to “null” → Save



The screenshot shows the 'Sharing Settings' interface with the following steps:

- Step 1: Rule Name**
 - Label: Access For All Partner
 - Rule Name: Access_For_All_Partne
 - Description: Access For All Partner Records
- Step 2: Select your rule type**
 - Rule Type: ☒ Guest user access, based on criteria
- Step 3: Select which records to be shared**
 - This sharing rule grants access to guest users without login credentials. By modifying the default settings in accordance with these criteria, you're allowing immediate and unlimited access to all records matching these criteria to anyone accessing the site, even without logging in. To secure your site and its data from guest users, consider all the use cases and implications, and implement security controls that you think are appropriate for the sensitivity of your data. Salesforce isn't responsible for any exposure of your data to guest users related to this change from default settings.
 - Criteria:
 - Field: Partner Id, Operator: not equal to, Value: (empty)
 - Field: (None--), Operator: (None--), Value: (empty)
 - Field: (None--), Operator: (None--), Value: (empty)
 - Field: (None--), Operator: (None--), Value: (empty)
 - Field: (None--), Operator: (None--), Value: (empty)
 - Additional Options: ☐ Include records owned by high-volume users
- Step 4: Select the users to share with**
 - Share with: IdyaFlow Partner Listing Demo Site Guest User
- Step 5: Select the level of access for the users**
 - Access Level: Read Only

Buttons: Save, Cancel

Sharing Rules

Partner Sharing Rules [New] [Recalculate] [Partner Sharing Rules Help]

A sharing rule operation is currently in progress. The initiating user will receive an email when each operation finishes.

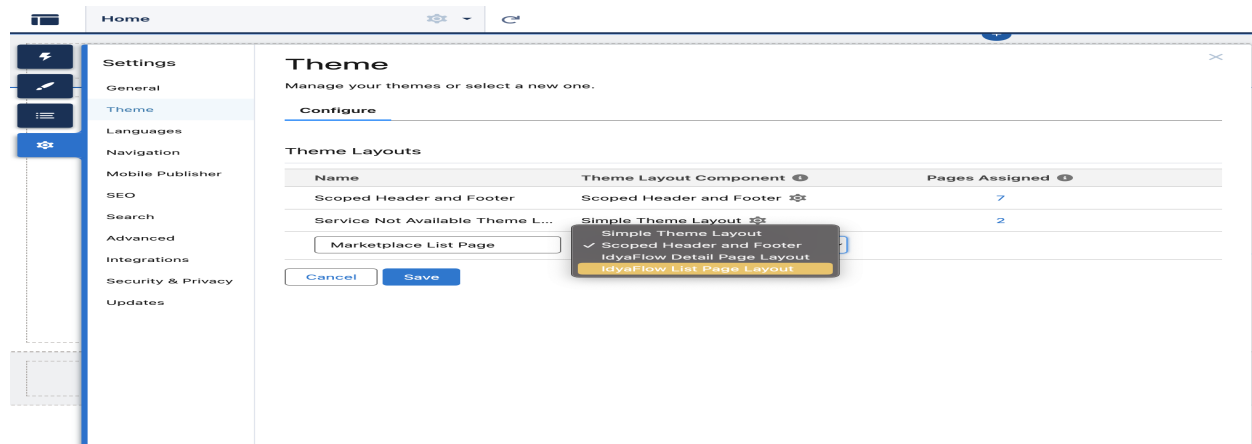
Action	Criteria	Shared With	Access Level
Edit Del	Partner: Partner Id NOT EQUAL TO	IdyaFlow Partner Listing Demo Site Guest User	Read Only

- The sharing rule operation process begins and can take up to 10 minutes. You will be notified by email when it is completed.

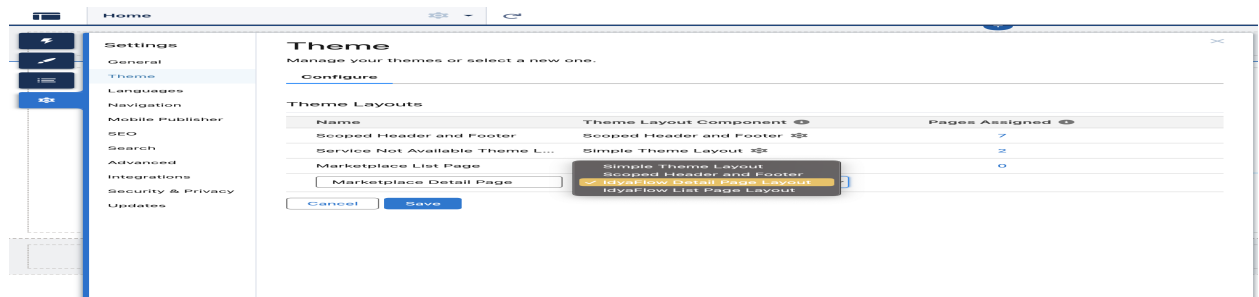
Step C – Create Public Site

Create Themes & layout

- Setup → Feature Settings → Digital Experience → All Sites
- Click on Builder
- Go to **Settings** → **Themes** → **New Theme Layout**
- Populate the **Theme Name** field with “Your Partner Listing Page Name” and select “**IdyaFlow List Page Layout**” from the dropdown
- Click **Save**.

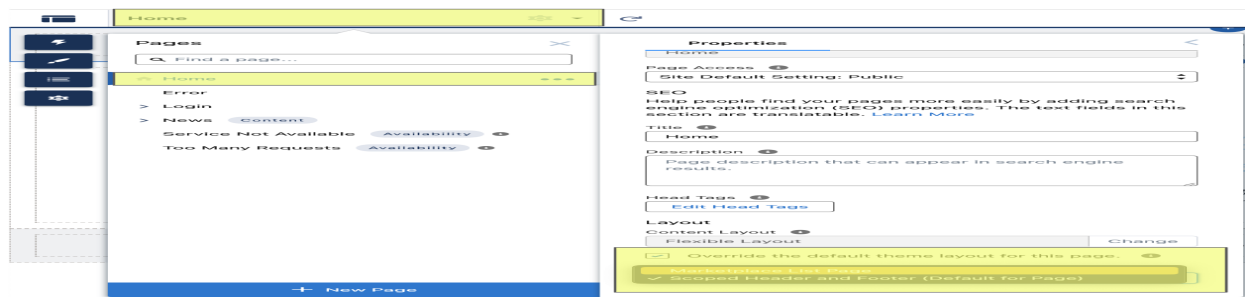


- Add Detail Page Layout by clicking **New Theme Layout**
- Populate the **Theme Name** field with "Your Partner Detail Page Name" and select "**IdyaFlow Detail Page Layout**" from the dropdown
- Click **Save**.



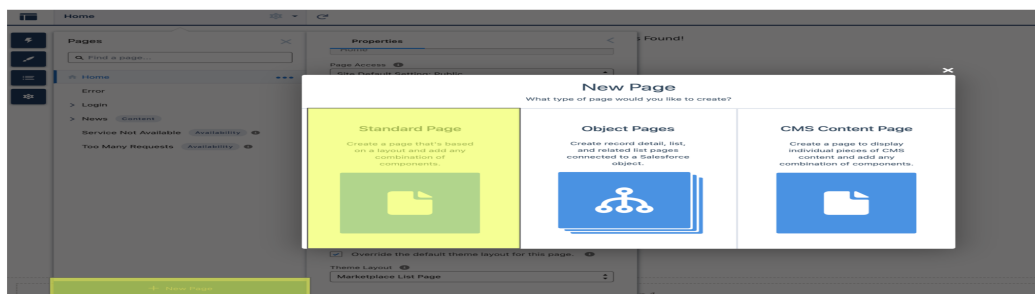
Override Home Page to "Marketplace List Page"

- Go to **Home** → **Settings** → **Override**



Create "Marketplace Details Page"

- Go to **Home** → **Settings** → **New Page** → **Standard Page**



- Name: Marketplace Listing Details
- API Name: **ifdc_service_details** (ensure the API name is correct)
- Click **Create**

New Page

Give your page a name and a URL.

* Name

Marketplace Details Page

* URL

/ marketplace-details-page

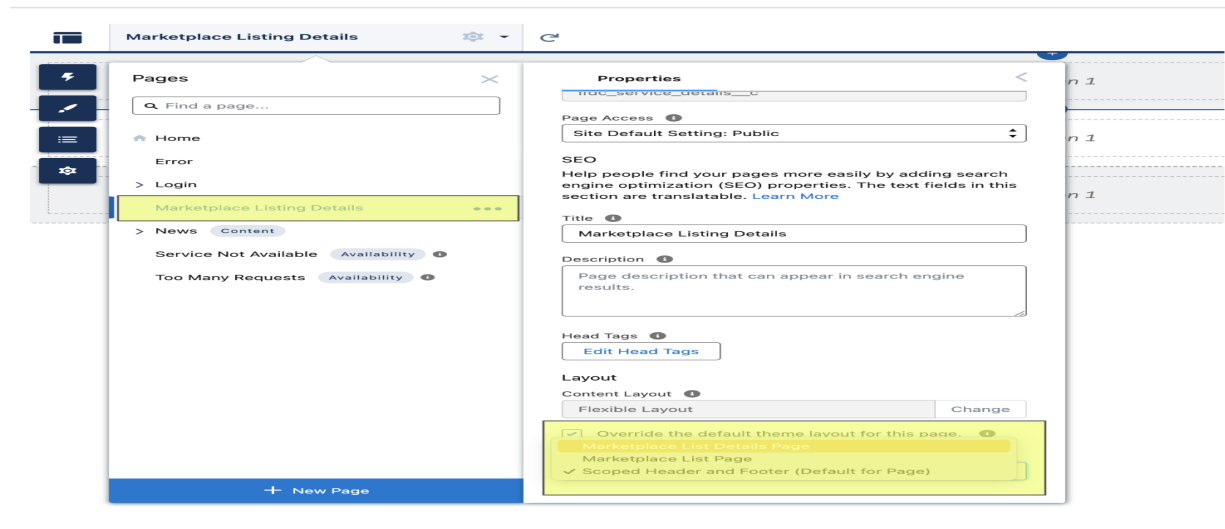
API Name

ifdc_service_details

← Back

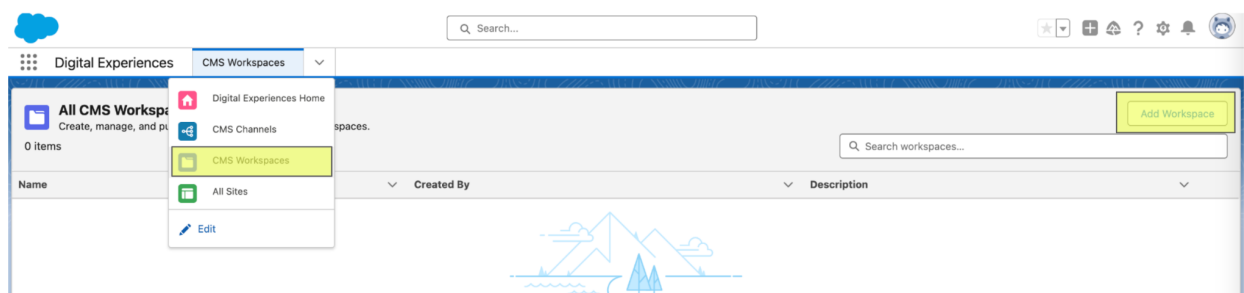
Create

Override Details Page to “Marketplace List Details Page” Theme



Create CMS Workspaces

- Click on **App Launcher** → **View All** → **Digital Experiences**
- Click on **CMS Workspaces** and select **Add Workspace**.



- Enter the **Name** and **Description** → **Enhanced CMS Workspace** → **Next**

Add CMS Workspace

Name and Describe Your Workspace

* Name

Public Marketplace

Description

Public facing Website

Select a CMS workspace type that's compatible with the channels you want to share content to.

CMS Workspace

Create a CMS workspace to publish content to [Salesforce CMS channels](#) except an enhanced LWR site.

Enhanced CMS Workspace

Create an enhanced CMS workspace to publish content to an enhanced LWR site.

Back

Next

- Select the **Channel** → **Next**

Add CMS Workspace

Add Channels

Search channels...

Create Channel

Name	Connection
IdyaFlow Partner Listing Demo	Site

Back

Next

- Select English as **Default language** → **Next**.

Add Images (as Content)

- Click on **Add** → **Content** → Select **Image** → **Create**
- Enter **Name** → **Upload Image** → **Save** → **Publish**

Save

Title
Site Logo

Content Slug
site-logo

Alt Text
IdyaFlow Logo

Source
Drag a file here...

Upload

[Insert from URL](#)

Now Ready! to Create Partner Listings

Congratulations! You are now ready to create and manage partner listings into your Salesforce sandbox or production environment.

Use [Partner Listing - User Guide](#) to complete the listing.