



Get Started with Partner Locator

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Partner Locator

Companies invest considerable time and money in demand generation and the development of their direct sales and channel partners. It is of the utmost importance that leads and potential customers can easily find and connect with your sales team or channel partners. Partner Locator allows customers to expose their partner directory on both their community and the public internet. Partner Locator is highly customizable, geolocation driven component. It allows admins to edit the app layouts and structure while giving the freedom to include or exclude standard and custom fields in the search query.

Available in: Lightning Experience

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



Important: Salesforce Labs is a program that lets Salesforce employees share AppExchange apps they've created. Inspired by employees' work with customers of all sizes and industries, these apps range from simple utilities to entire vertical solutions. Salesforce Labs apps aren't official Salesforce products, and aren't supported by Salesforce Customer Support. Future Salesforce releases won't include updates to Salesforce Labs products. For help on any Salesforce Labs app please consult the Salesforce message boards.

Set Up Partner Locator

[Partner Locator](#) needs to be installed from the AppExchange. When installation is complete, you can customize the components to meet your needs.

User Permissions Needed	
To install AppExchange packages:	Download AppExchange Packages
To customize Partner Locator:	• Access Community Management OR Manage Communities OR Create and Set Up Communities • AND is a member of the community

Install

1. In a browser, go to the installation URL provided by the package developer, or, if you're installing a package from the AppExchange, click Get It Now from the application information page.



Note:

- If you're installing into a sandbox, replace the www.salesforce.com portion of the installation link with test.salesforce.com. The package is removed from your sandbox organization whenever you create a new sandbox copy..
2. Enter your username and password for the Salesforce organization in which you want to install the package, and then click the login button.
 3. Choose **Install for All Users**

Post-Install (General)

1. To enable Geocoding for locations (Account Addresses) on the Partner Locator Map, you need Activate Data Integration Rules from Setup.
 - a. Go to Setup > Data Management > Data Integration Rules
 - b. Activate Geocodes for Account Billing Address

Post-Install (Community)

1. Grant permissions to profiles that will use Partner Locator
 - a. Grant Read Access to Accounts on the Community (and/or Internal) Profiles
 - b. Grant read access Field-Level Security for the Account fields you want to expose for the same Profiles
 - c. Grant the 'Partner Locator User' permission set to any user that will be using the tool.
2. In Community Builder, drag and drop the Partner Locator components onto any page you wish to show it

Post-Install (Public Site)

**To expose publicly (Optional)

1. Create a Site
Edit Guest User profile for that site
 - i. Grant Read Access to Accounts on the Guest User Profile for the Site
 - ii. Grant read access Field-Level Security for the Account fields you want to expose for the same Profile

2. Create a Lightning App from the Developer Console. Insert the following code snippet

```
<aura:application access="GLOBAL" extends="ltng:outApp" implements="ltng:allowGuestAccess">
  <aura:dependency resource="partner_locator:PartnerLocatorSearch"/>
  <aura:dependency resource="partner_locator:PartnerLocatorMap"/> <aura:dependency
resource="partner_locator:PartnerLocatorResultList"/>
</aura:application>
```

3. Create a Visualforce page and copy the following code.

```
1 <apex:page >
2   <apex:includeLightning />
3   <script src="https://yourCommunityDomain/communityURL/lightning/lightning.out.js">
4     </script>
5
6   <div id="search" />
7   <div id="map" />
8   <div id="results" />
9
10  <script>
11    $Lightning.use("partner_locator:PartnerLocatorOut", function() {
12      $Lightning.createComponent("partner_locator:PartnerLocatorSearch", {},
13        "search",
14        function(cmp) {
15          // do some stuff
16        });
17      /*
18      $Lightning.createComponent("partner_locator:PartnerLocatorMap", { height : "200px" },
19        "map",
20        function(cmp) {
21          // do some stuff
22        });*/
23
24      $Lightning.createComponent("partner_locator:PartnerLocatorResultList", { displayResultsAs : "Cards" },
25        "results",
26        function(cmp) {
27          // do some stuff
28        });
29
30    });
31  </script>
32 </apex:page>
```

4. Set the Visualforce page you just created as the home page of the Site you created earlier.
5. To display on any external website, embed the public site URL into an iframe in that external site.

Component: Partner Locator Search

Property	Details
Search Fields	Add the API names of the fields to include in the search. (e.g. Custom_field__c)
Distance Measurement	Choose whether to calculate distance in miles or kilometers
Include Type	Show or hide the Type criteria
Include Industry	Show or hide the Industry criteria
Include Rating	Show or hide the Rating criteria
Include Distance	Show or hide the Distance criteria
Include Partner	Show or hide the Partner criteria. The “IsPartner” checkbox on Account.
Search Field Label	Label for the Search field or keyword
Distance Label	Label for the Distance field
Location Label	Label for the Location field
Partner Only Label	Label for the Partner only field.
Search Button Label	Label for search button
Search Column Alignment (SLDS)	Label for search button
Search Column Flexibility (SLDS)	Spacing of the columns in the search bar, taken from the Lightning Design System.
Search Column Flexibility (SLDS)	Flexibility and auto width of columns in the search bar, taken from the Lightning Design System.
Account Record Type	Select the record type in which to limit the results to.

Component: Partner Locator Result List

Property	Details
Header Icon	SLDS Icon for the the results container. Default is <code>custom:custom96</code>
Number of search results per page	Number of results to display per page - also controls number of markers on map. Default is 10.
Display Results As	Show search results as a list in a table or as Cards.
List: Fields to display	Add the API names, in a comma seperated list, of the fields to include in the result table. (e.g. <code>Custom_field__c,Custom_field_2__c</code>)
Cards: Card Column Widthn	Column width of result card - inherited from SLDS.
Field Set API Name	The Account Field Set to display fields in popup modal.
Number of Columns in Popup	Number of columns in layout for selected account details in modal.

Component: Partner Locator Map

Property	Details
Map Provider	Choose map provider. Google Maps or Leaflet Maps
Map Height	Specify the height of the map in pixels (px).
Map Width	Please specify the width of the map in % or px.

Considerations When Using Partner Locator

When you install Partner Locator in your org, you're allowing it to access account information. Make sure you consider the following before installation:

- For security reasons be sure to limit the available fields to the users profiles. You do not want a data breach. This is especially important when allowing guest access or embedding the tool on a public site.

