Map Experience Cloud User to Contact: Configuration Guide

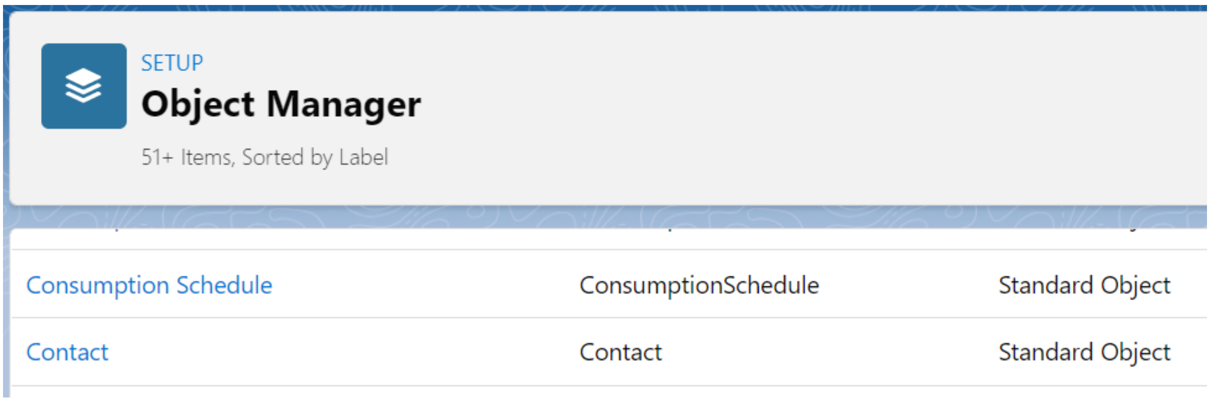
When you install the Package from the AppExchange all of the features and functionality will be enabled for you.

To expose this solution to your users you will need to complete the following;

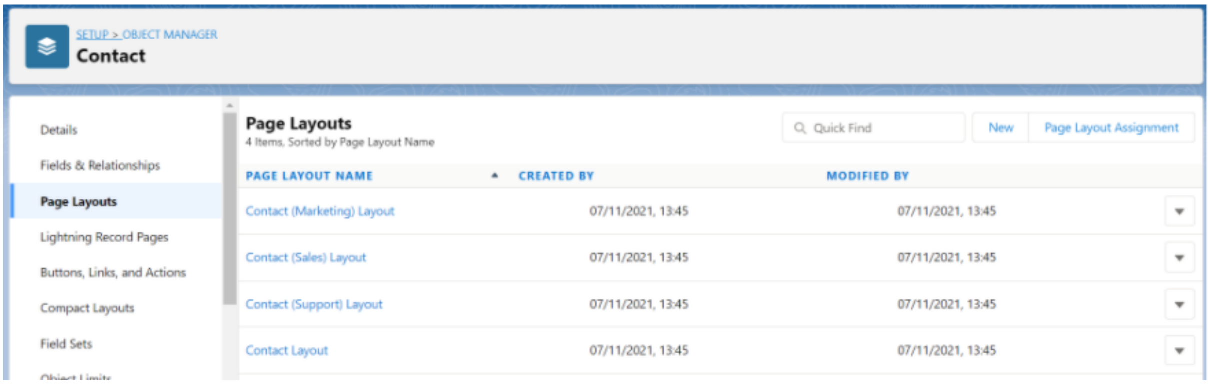
1. Add Contact fields to Contact Page Layout(s)

Press on the Settings Cog and then press on **Setup**

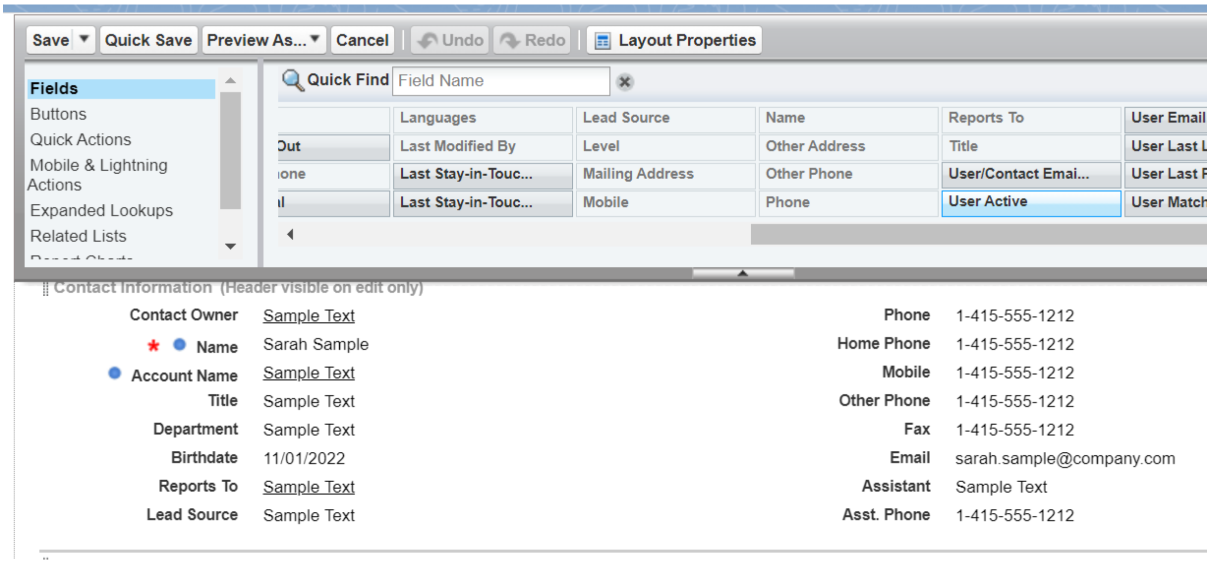
Press on **Object Manager** and then **Contact**



Press on **Page Layouts** and then press on the Page Layout Name for which you want to add the fields



From within the **Page Layout Editor**, look for the new fields which have been created as part of this package and Drag & Drop them onto the contact layout

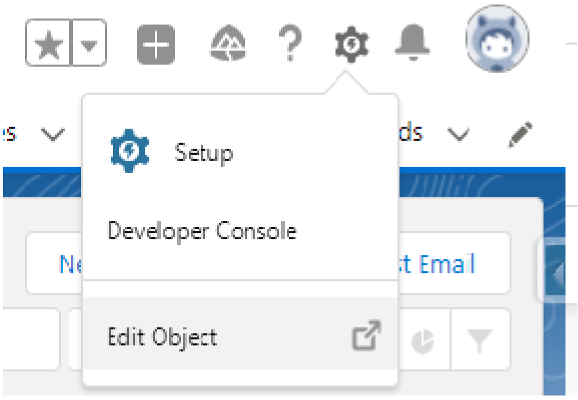


Save the Page Layout and repeat for any additional layouts for which you want to add the button.

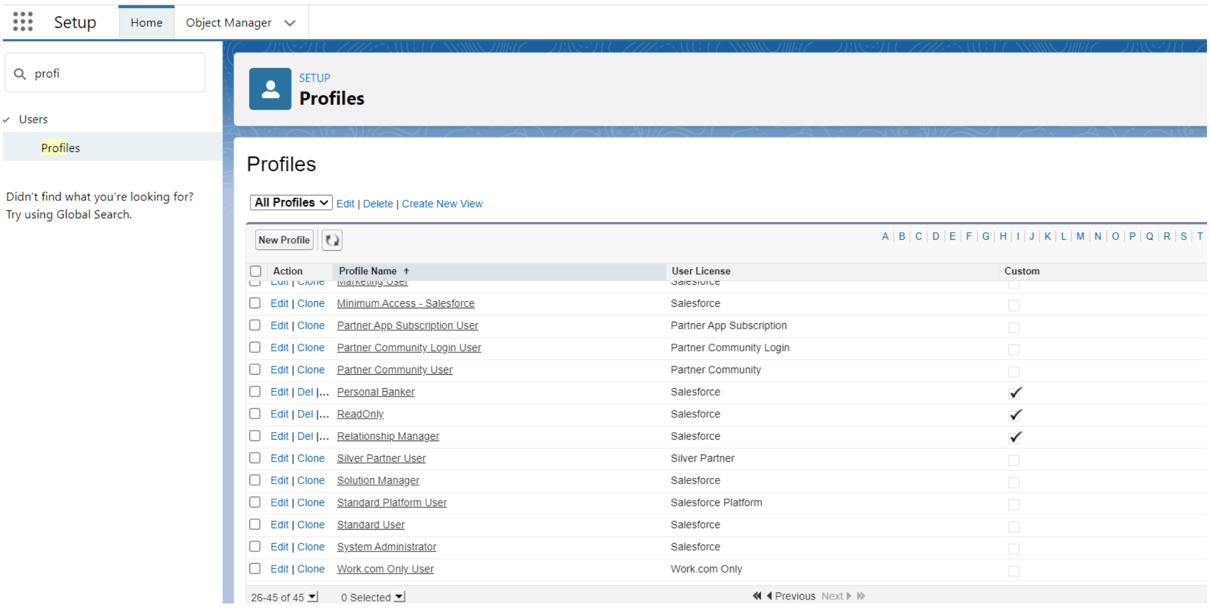
2. Grant Access to Lightning Page/ Tab for Map Contacts to Experience Cloud Users

Anyone who should have access to the 'Map Contacts to Experience Cloud Users' tab needs to be granted access via their profile.

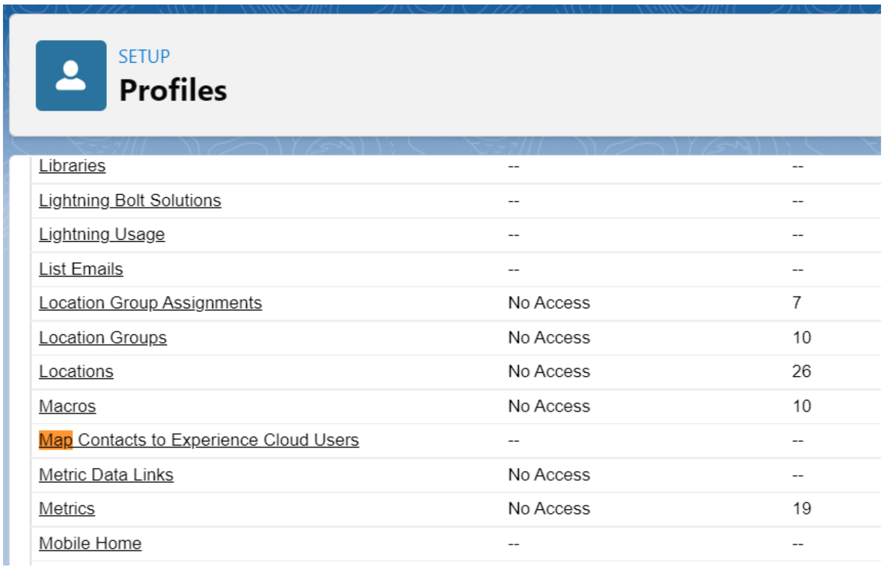
Press on the Settings Cog and then press on **Setup**

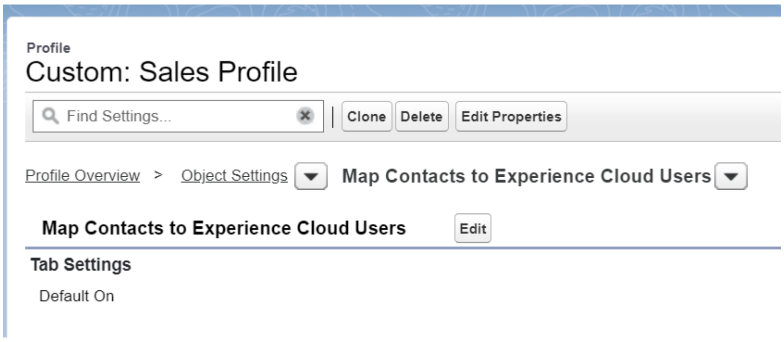


Select **Profiles** from the side bar and select the necessary profile.



Under **Object Settings**, find the **Map Contacts to Experience Cloud Users** tab and set the tab to “**Default On**”. (nb: View will be different if you’ve enabled “Enhanced Profile User Interface”, this should instead appear under Object Settings).

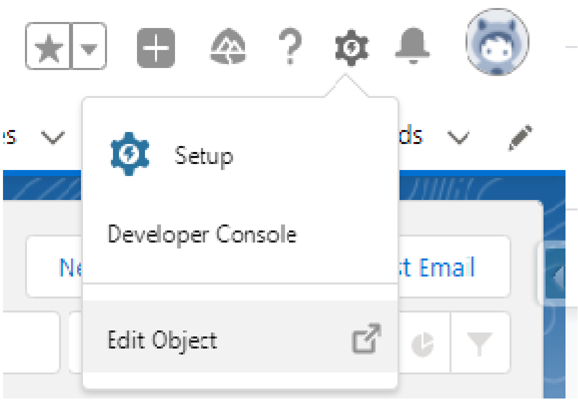




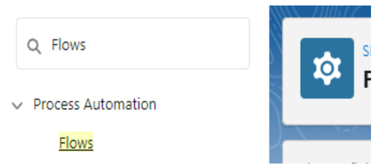
Repeat for any additional profiles you wish to edit.

3. Set Flow to Scheduled

If you want the flow to run on a scheduled basis (eg. Daily or Monthly) then first navigate to Setup

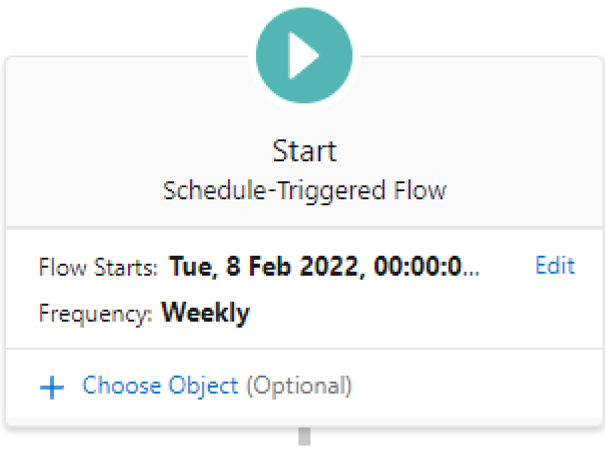


From setup use the Quick Find to search for Flows and then press on User <> Contact Relationship (Schedulable)

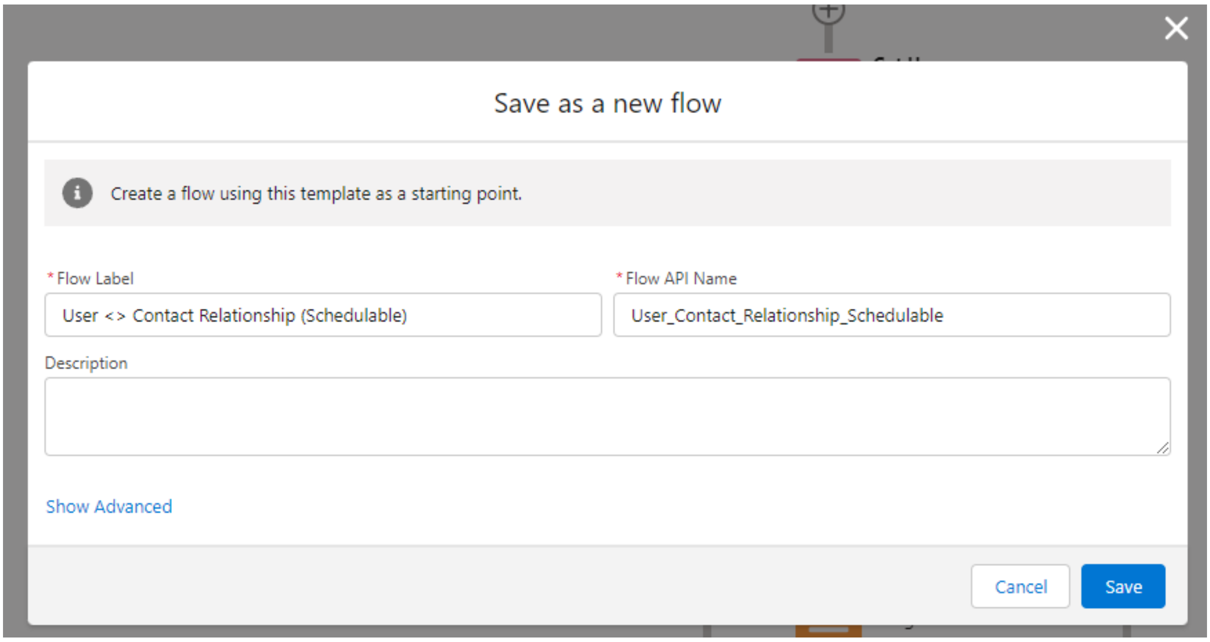


Flow Label ↑	Process Type	Active	Template
Cancel Item Flow	Screen Flow	☐	☑
Create a Case	Screen Flow	☑	☑
Create Order Summary Flow	Autolaunched Flow	☐	☑
Create Process Exception Flow	Autolaunched Flow	☐	☑
Map Contacts to Experience Cloud Users	Screen Flow	☑	☐
Reset Password	Screen Flow	☑	☑
Return Item Flow	Screen Flow	☐	☑
TEST	Autolaunched Flow	☐	☐
User <> Contact Relationship	Autolaunched Flow	☑	☐
User <> Contact Relationship (Schedulable)	Autolaunched Flow	☐	☑
User Flow	Autolaunched Flow	☐	☐
Verify Identity	Screen Flow	☑	☑

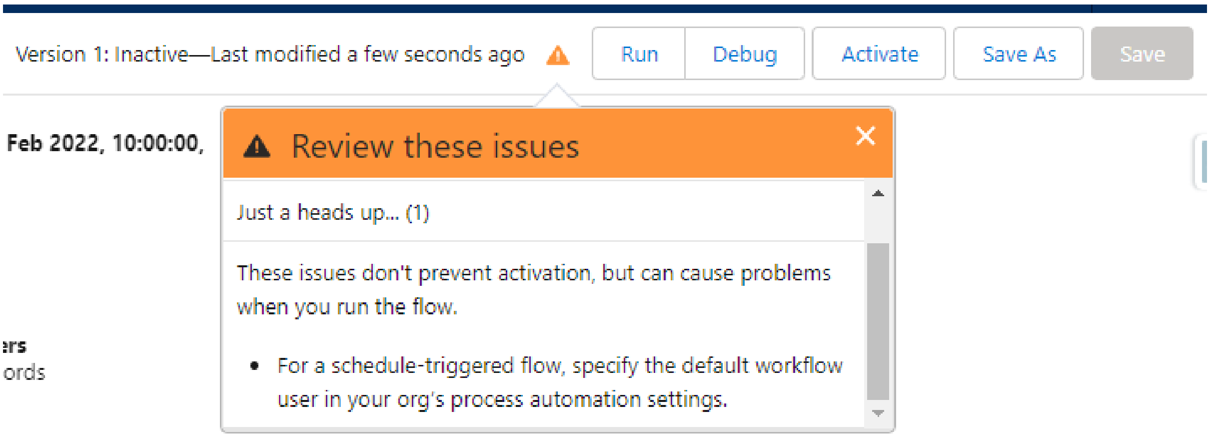
From the Flow Builder configure the start element with the correct schedule, start date and time



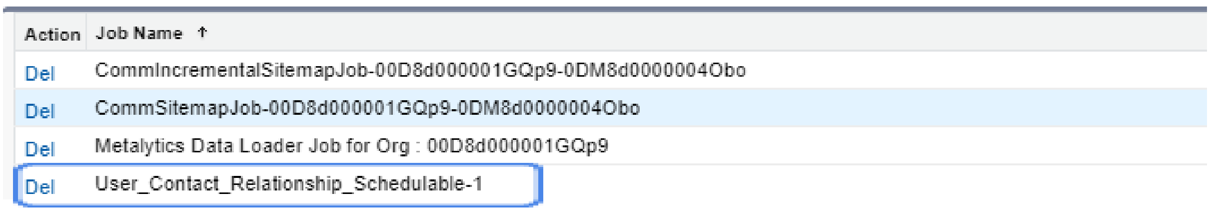
Next press Save As, define a name for the flow and then press save



Once saved don’t forget to Activate the Flow by pressing the Activate button



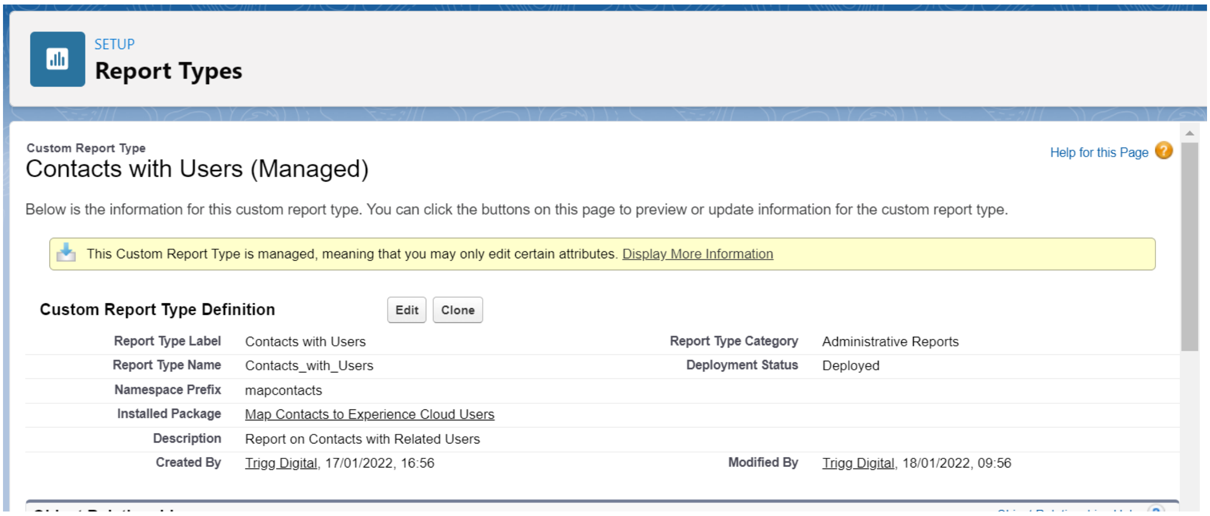
If you would like to check the Flow has been scheduled then from Setup > Scheduled Jobs you should see a entry like this



4. Reporting

A Custom Report Type called ‘**Contacts with Users (Managed)**’ is created in your org as part of this package.

It is recommended to clone the custom report type so that changes can be made to it (adding custom fields,etc) and any customizations are not overwritten during the upgrade of the package at a later point.



Once cloned, edit the managed custom report type which was created during the package installation and change its status to ‘In Development’.

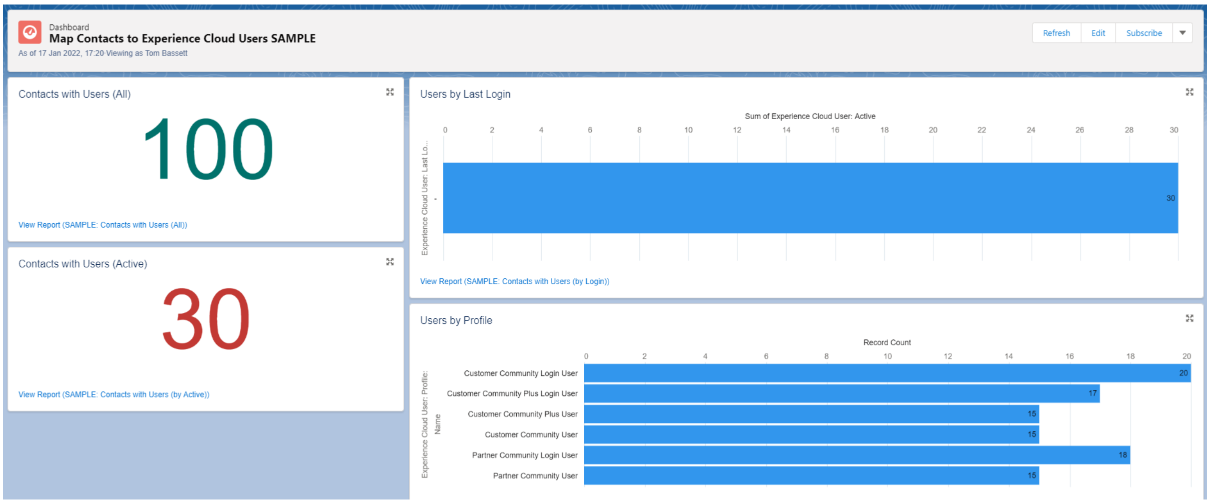
Included in this package, you will find four sample reports and one dashboard which can be customized to meet your needs.

Reports:
Report > All Folders > Map Contacts to Experience Cloud Users

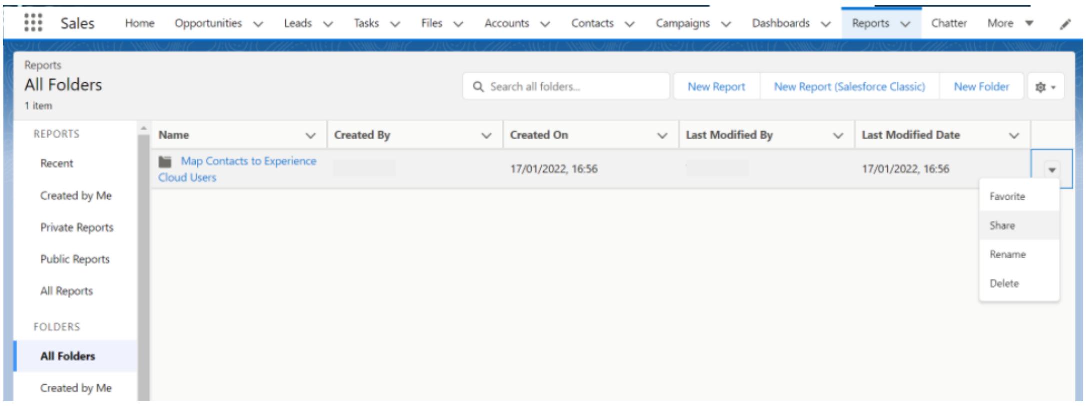
- SAMPLE: Contacts with Users (by Active)
- SAMPLE: Contacts with Users (All)
- SAMPLE: Contacts with Users (by Profile)
- SAMPLE: Contacts with Users (by Login)

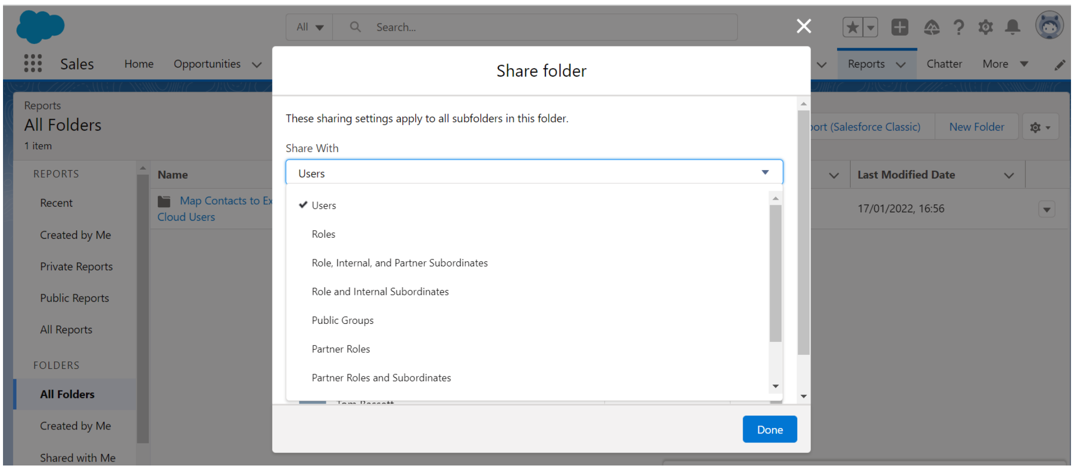
Dashboard:
Dashboards > All Folders > Map Contacts to Experience Cloud Users

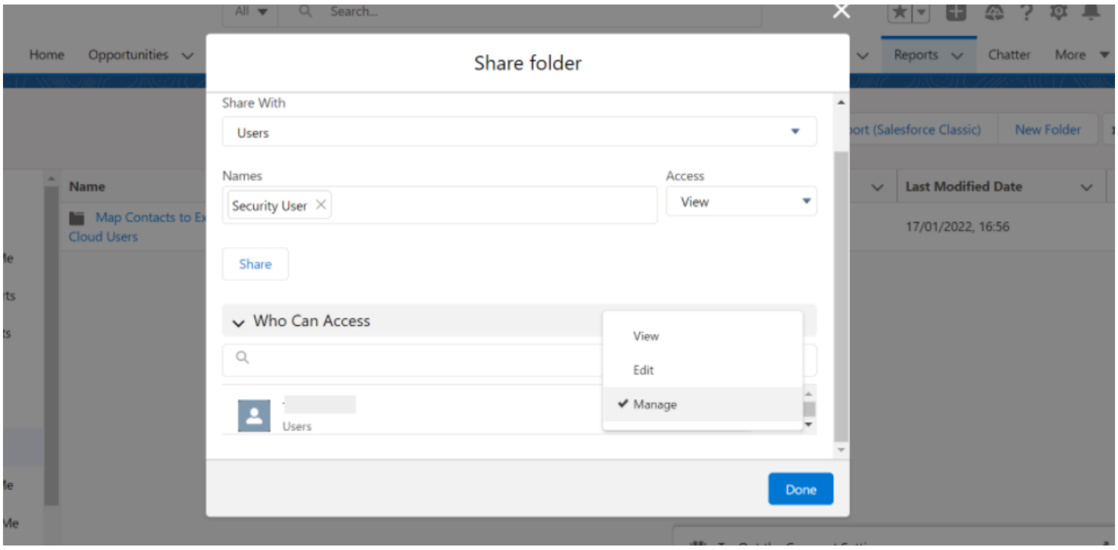
- Map Contacts to Experience Cloud Users SAMPLE



To grant access to these reports and dashboards, share the folder in which these reports and/or dashboards are stored with the relevant user/role/public group/etc by clicking on the arrow on the right hand side. Then, select the access level granted: View, Edit or Manage.







5. Other Points to Note

- As this uses Lightning Flow your org needs to be running in Lightning and have this enabled

- The flow will run as the Current User so the Running User will need to have the necessary permissions to edit Contacts
    - Contact; Read, Edit

- The Running User will need to access to Flow via their Profile/Permission Set

- Although the package may function correctly without “Flow User” checked it’s always best practice to make sure each Running User has Flow User checked on their User Record

- If you wish to uninstall the package you will need to deactivate the Flow prior to uninstall for this process to be successful

- If you have Person Accounts enabled the package will work in the same way, please add the fields to the Person Account layout instead of the Contact layout.

- To avoid conflicting with the NonProfit Success Pack (NPSP), while this code is run the NPSP triggers are temporarily disabled.