SAVIYNT | **Deloitte.**

SOLUTION GUIDE

Salesforce Contact Management for Partner Community Users

Connect Everything. Securely.

Problem Statement

Contacts in Salesforce serve as a repository for information concerning individuals with whom you engage in business, particularly partners. Typically, contacts are linked to a user account, but they can also be connected to other records like opportunities. Enhancing the utility of contacts involves enabling their association with multiple user accounts, integrating hierarchy details, and customizing sharing settings. In enterprise organizations utilizing Salesforce alongside partner community users, it is obligatory to establish contact information and associate it with a user account before creating the user in Salesforce. As per Salesforce's standard functionality, the creation of a partner community licensed user necessitates the prior creation of a contact. While Saviynt's out-of-the-box Salesforce connector facilitates user creation, it presently lacks support for generating a contact object for partner community users.

To address the aforementioned obstacle, we devised a solution within Saviynt that tackles the limitation through a hybrid connector approach. This approach involves utilizing the Saviynt out-of-the-box REST connector for creating the contact in Salesforce and leveraging the out-of-the-box SalesForce connector for partner community user creation. The process of creating the contact object and partner community users occurs sequentially within Saviynt.

Customer Value

Due to the lower cost of a partner community license compared to a full standard user license in Salesforce, customers can efficiently handle their partners, distributors, or resellers through Saviynt. This allows them to circumvent the utilization of the higher-cost "Standard User License."

$ Reduce license costs.

👤 Effectively manage partner community users from Saviynt.

Solution Benefits

By leveraging the out-of-the-box (OOTB) functionalities of Saviynt, the hybrid connector approach employed in this solution eliminates the need for relying on a single connector. Consequently, there is no requirement for additional enhancements to the existing Salesforce connector. This streamlined approach accelerates the integration process, reducing integration time.

- Use OOTB features of Saviynt hence avoiding any additional fix or enhancement to the Saviynt product

- Enabling the customers to manage the partner community users from Saviynt, hence reducing the licensing costs.

Next Steps

View the extensive library of integrations at https://saviynt.com/integrations to see detailed information and implementation guides designed to help you get the most from the Enterprise Identity Cloud.

Saviynt 🛡 Exchange
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