Setting Up Amp Impact in Communities

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Overview

The purpose of this guide is to help consultants set up a Salesforce Community with Amp Impact functionality. These steps will set up Community Users with access to Add Results, Performance Graphs, and Project records, but not to Manage Framework, Manage Indicators, Set Targets, or Manage Disbursements. For any additional customized functionality and/or access in Communities, additional configuration may be required.

Create Permission Set for Community Users

ⓘ This permission set is an **example** to provide Customer Community Users with access to all Project records and the Activity Tracking, Add Results, and Performance Graphs pages. Permissions should be customised to an organisation's use case. **Note** Permission Sets will vary based on the user license. Not all object level permissions are available for all user licenses.

1. Go to Setup.
2. Type "Permission Sets" in Quick Find and click the result.
3. Find "Amp Impact Admin" and click "Clone". Set the following:
    a. Label: Amp Impact Community
    b. API Name: Amp_Impact_Community
4. Click "Assigned Apps". In the page that loads, click "Edit".
5. Move ampi.Amp Impact (ampi__Amp_Impact) and ampi.Amp Impact (ampi__Amp_Impact_Lightning) from the "Enabled Apps" list to the "Available Apps" list and click "Save".
    a. Assigned Apps are not allowed for some Community User licenses.
6. Open " Object Settings".
7. For each object in the table below, set the following permissions by clicking each object and then clicking "Edit".

Object	Read	Create	Edit	Delete	View All	Modify All
Activities	X	X	X	X		
Budgets	No access					

Disaggregated Indicators	No access					
Disaggregated Project Indicators	X	X	X		X	
Disaggregation Groups	X	X	X		X	
Disaggregation Values	X	X	X	X	X	X
Object (continued)	**Read**	**Create**	**Edit**	**Delete**	**View All**	**Modify All**
Disbursements	No access					
Financials	No access					
Geographic Areas	X					
IATI Policies	No access					
IATI Sectors	No access					
Implementation Plans	X	X	X			
Indicators	X	X	X			
Indicator Thematic Areas	No access					
Objectives	X					
Organization Roles	X					
Project Geographic Areas	No access					
Project IATI Policies	No access					
Project IATI Sectors	No access					
Project Indicator Geographic Areas	X	X	X		X	
Project Indicator Objectives	No access					

Project Indicator Reporting Periods	X	X	X		X	
Project Indicators	X	X	X		X	
Project Indicator Thematic Areas	No access					
Project Objectives	X					
Project Roles	X					
Projects	X	X			X	
Project Thematic Areas	No access					
Questions	No access					
Object (continued)	**Read**	**Create**	**Edit**	**Delete**	**View All**	**Modify All**
Reporting Periods	X	X	X		X	
Results	X	X	X	X	X	X
Sections	No access					
Submissions	No access					
Thematic Areas	X					
Visualforce Updates	X	X				

Create Community Profile

> ⓘ These steps are an example using the Customer Community Login User license. If you already have a community user profile that you plan to use in a community with Amp Impact, assign the permission set to those users. Otherwise, use the steps below as guidelines to a profile for community users, and customise to the organisation's use case as needed.

1. Go to Setup.

2. Type “Profiles” in Quick Find and click the result.
3. Click “New Profile”.
    a. For the Existing User picklist, select “Customer Community Login User”.
    b. The User License should display “Customer Community Login”.
    c. For the Name field, enter “Amp Impact Community User”.
4. Click “Save”.
5. Click “Edit”.
6. Scroll to Administrative Permissions and make sure the checkbox next to “API Enabled” is selected.
7. Click “Save”.
8. Navigate to Visualforce Page Access. Add “ampi.AddResults” and “ampi.PerformanceGraph” to the Enabled Visualforce Pages list. Click “Save”.

Create Sharing Set with Read/Write Access for Project Indicator

ⓘ These steps are an example to create a sharing set for the profile created in the previous step, enabling users with that profile to have read/write access to Project Indicators of which they are owner. Please read here for more information about Sharing Sets. Sharing Rules can also be used to provide this level of access, depending on the organisation’s use case.

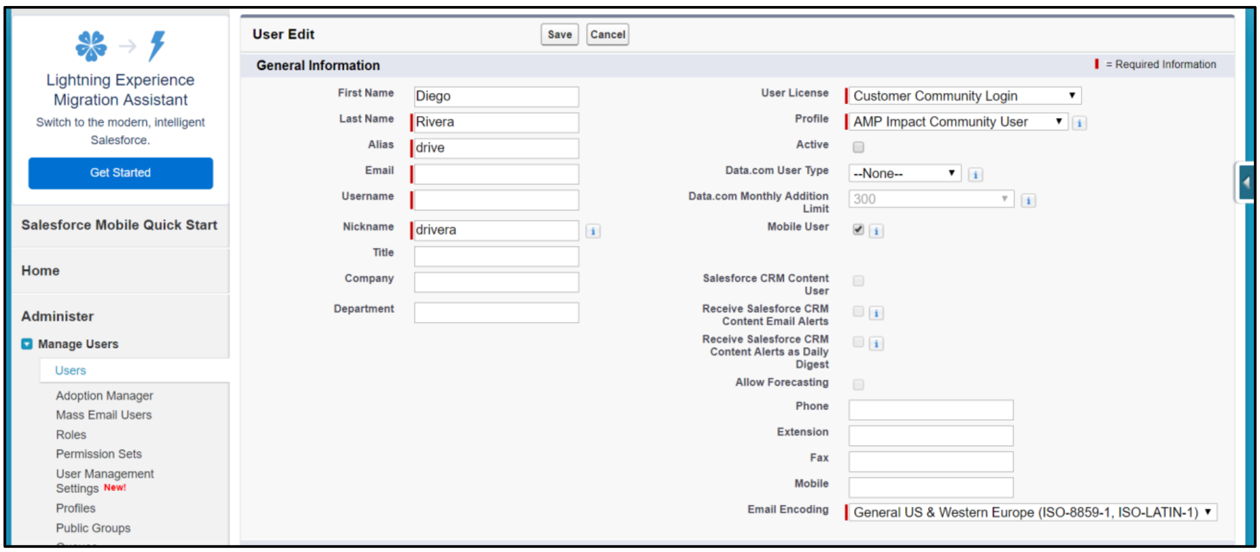
1. Go to Setup.
2. Type “Communities Settings” in Quick Find and click the result.
3. In the Sharing Sets related list, click “New”.
    a. Label: Amp Impact Community User
    b. API Name: Amp_Impact_Community_User
    c. Selected Profiles: Amp Impact Community User
    d. Selected Objects: Project Indicator
4. Click Set Up in the Configure Access table.
    a. Grant access where the User.Contact matches Target Project Indicator.Owner.Contact
    b. Access Level: Read/Write
5. Click Update.
6. Click Save.

Create Community Users

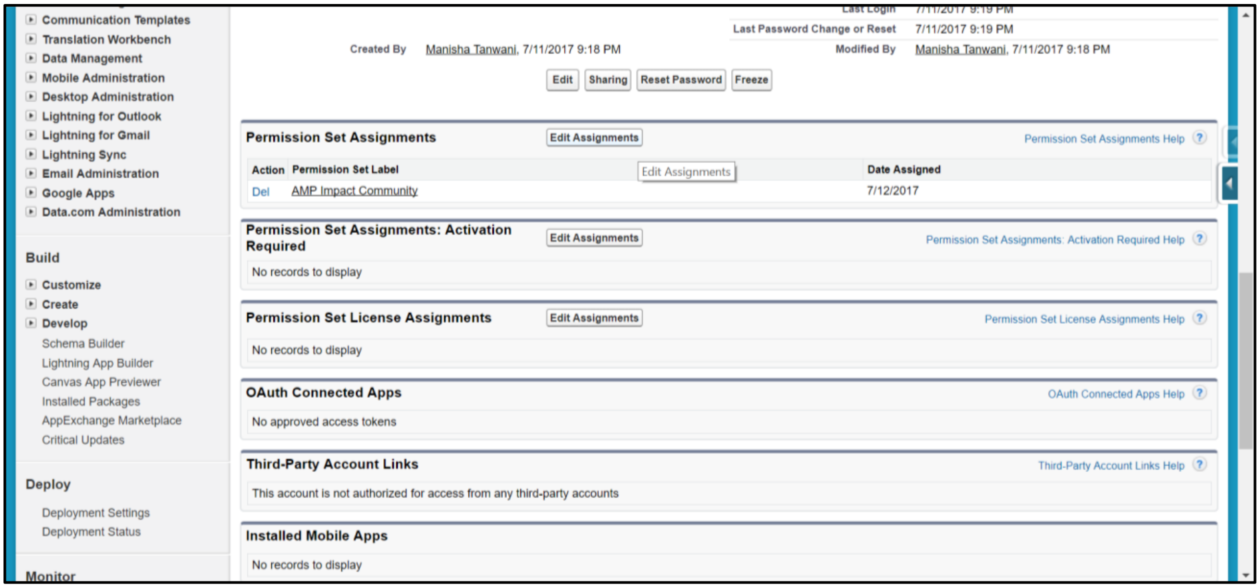
1. Open a Contact record detail.

ⓘ The Contact record must have a parent Account in order to be able to follow the next steps listed below.

2. Enable the Contact as a Customer user by:
    a. (Classic) Click “Manage External User” at the top of the record. Select “Enable Customer User” from the dropdown.
    b. (Lightning) Click “Enable Customer User” button.
3. In the User record page, select User License as “Customer Community Login” and Profile as “Amp Impact Community User” (or the Profile created in the earlier section on [customising Community Profiles](#)).



4. Click “Save”.
5. Scroll down the User record page to the first related list (Permission Set Assignments).
    Click “Edit Assignments”.



6. Add “Amp Impact Community” and “Submission Response” in the multi-select picklist. Click “Save”.

Set Up Lightning Community

ⓘ These steps will walk you through how to set up a Lightning Community with Projects and Submissions. Depending on your use case, certain steps can be skipped or modified.

In Setup

1. Open Setup.
2. Communities are not yet enabled, enable Communities.
    a. Type “Communities Settings” in Quick Find and click the result.
    b. Select “Enable Communities”.
3. Type “All Communities” in Quick Find and click the result.
4. Click the “New Community” button.

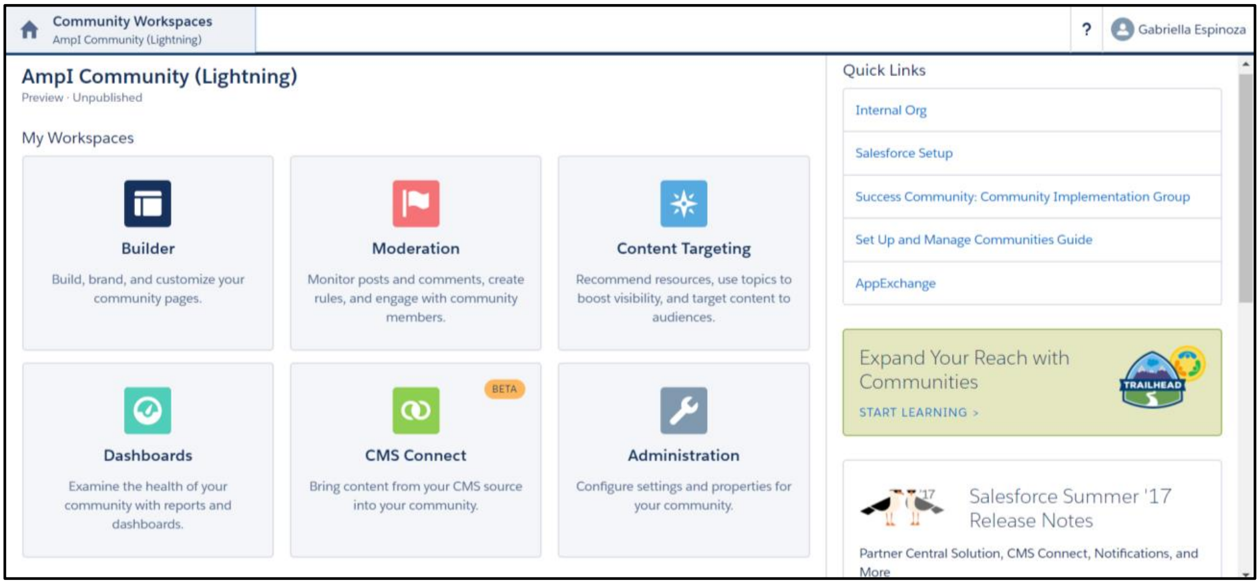
In Lightning Bolt Page

1. Select “Customer Service”.
2. Click “Get Started”.
3. Name your community and (optional) set a URL. Click “Create”. You will be taken to the Community Workspaces.

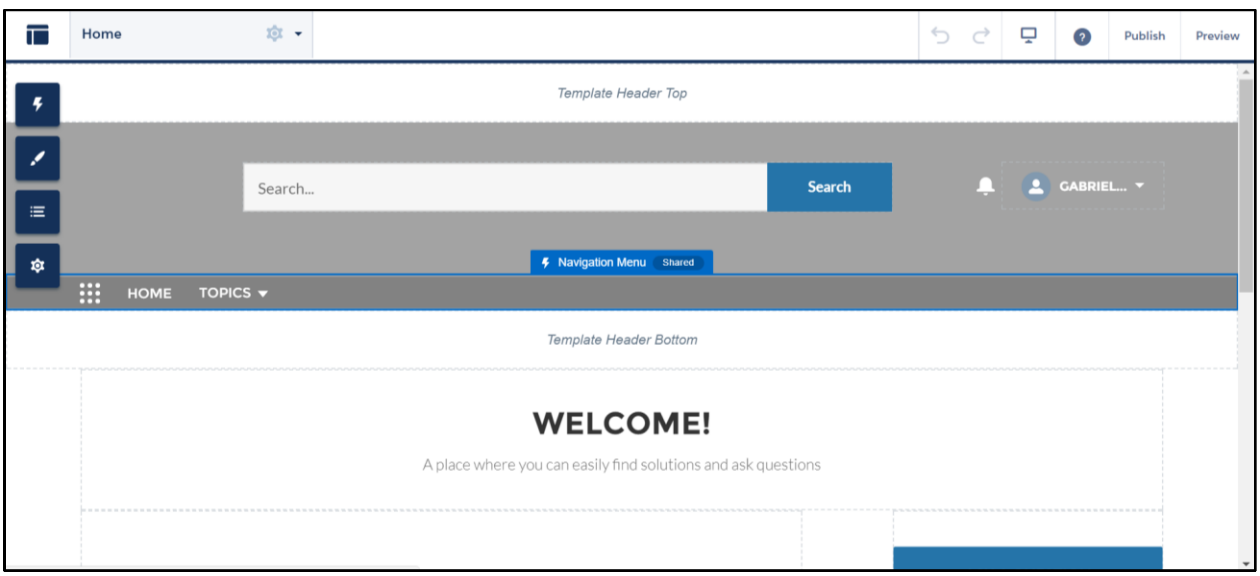
In Community Builder

Set Up Projects

1. Select “Builder”. You will be taken to the interactive builder.

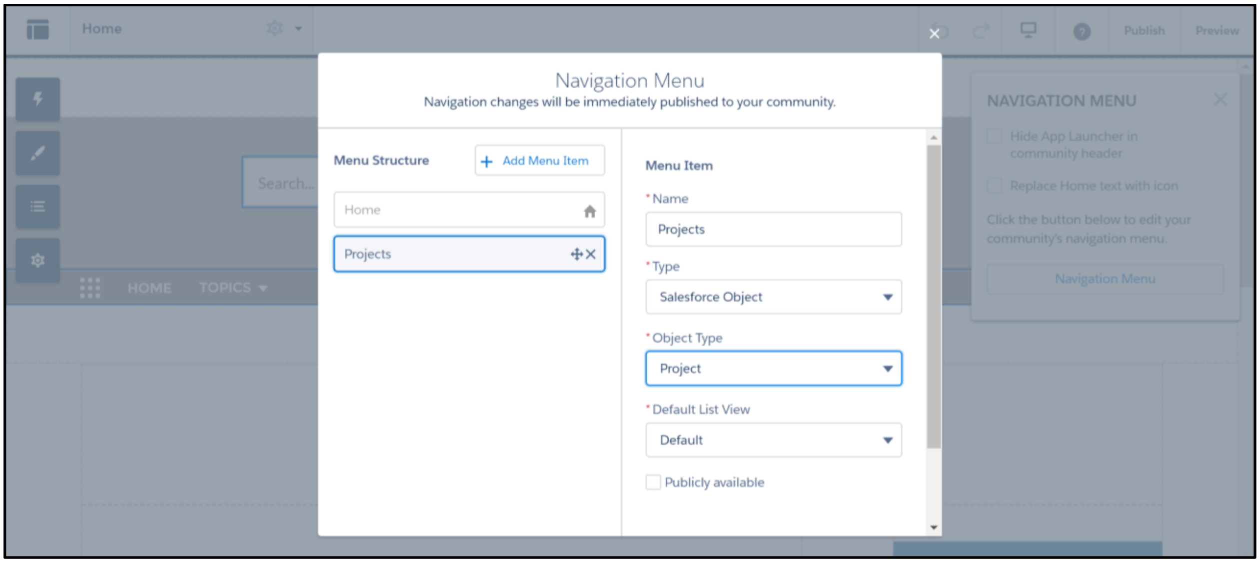


2. Click on the Navigation Menu. A popup will appear on the top right.



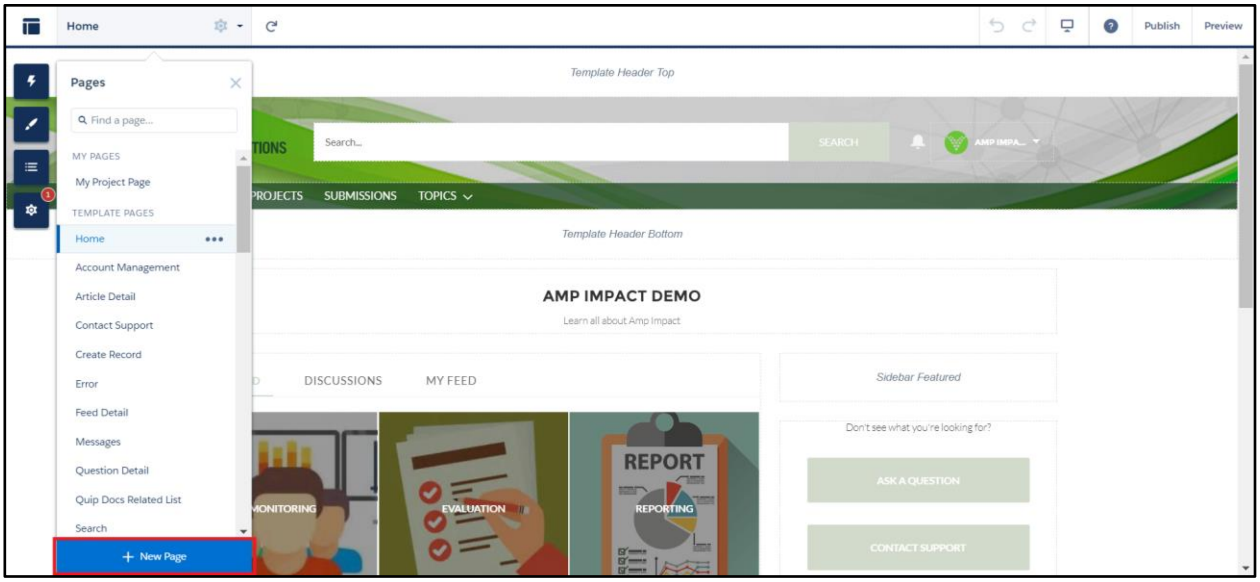
3. Click “Navigation Menu” button. Another popup will appear.

4. Click “+ Add Menu Item” button.
5. Name Menu Item as “Projects”, select Type as “Salesforce Object”, and select Object Type as “Project”. You can leave the Default List View at “Default”. Click “Save Menu”.

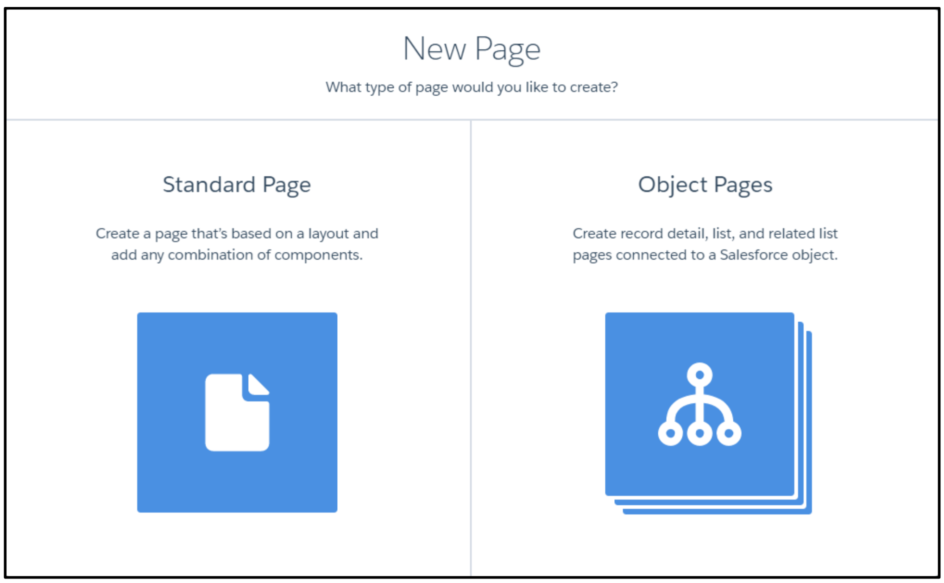


ⓘ The following 6 steps (6-11) on setting up tabs should only be followed if your organization is not using the Nav Bar for community users. If your organization would still like to use the Nav Bar in communities, please skip to the [next section](#).

6. Create a Project record page in the Community Builder.
    a. Click the dropdown in the top left corner. A picklist will appear.

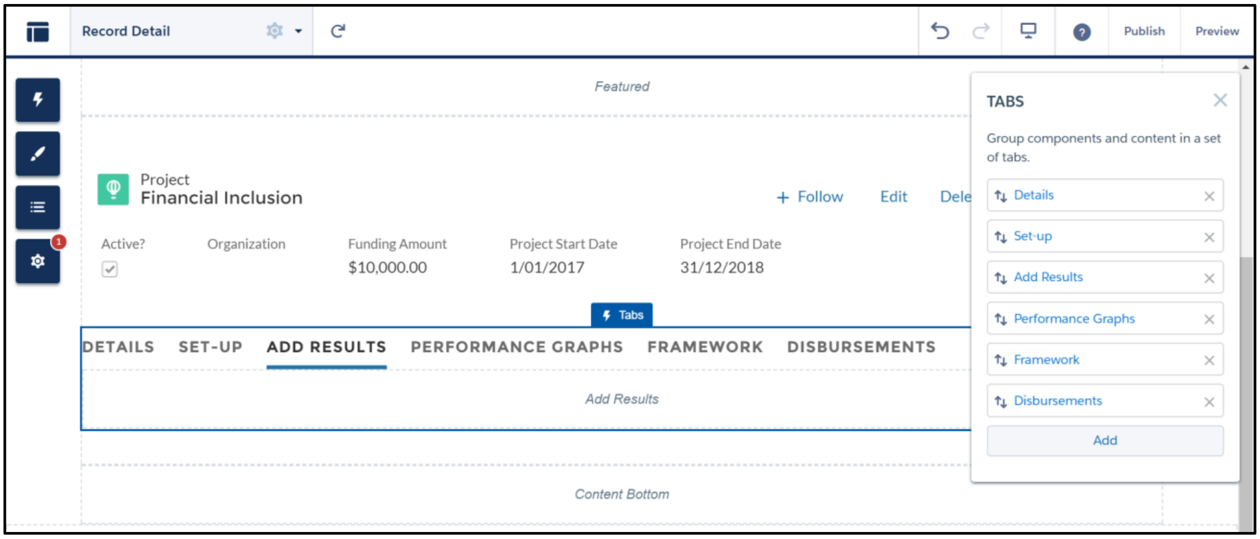


b. Scroll to the bottom of the Picklist and click the “+ New Page” button. A pop-up will appear.

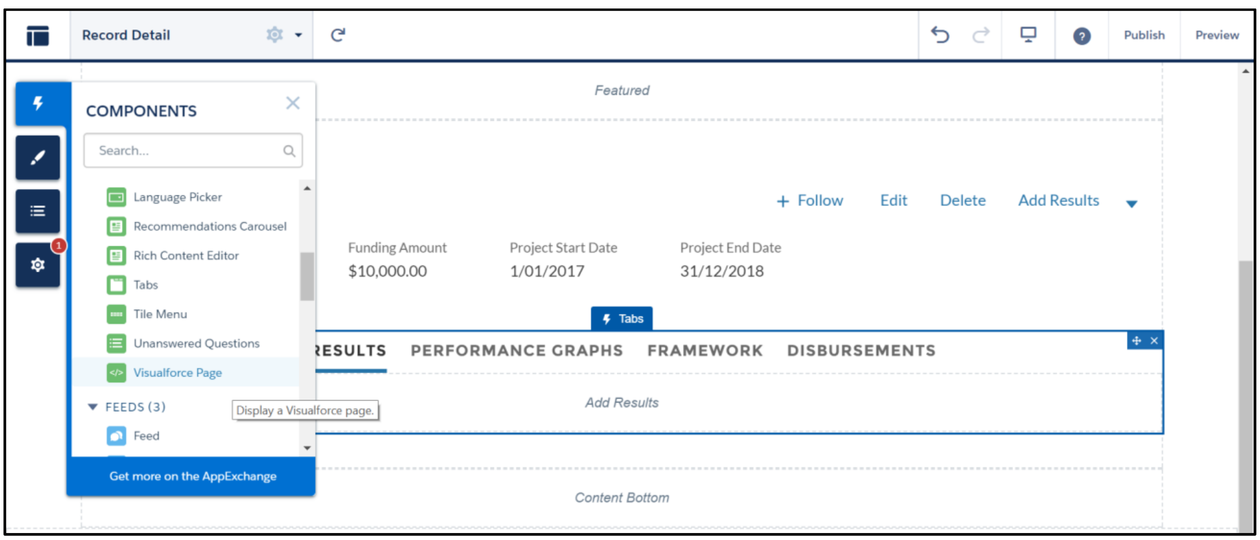


c. Select “Object Pages”.
d. Find and select “Project” in the list of Objects.
e. Click “Create”. You will be navigated to the new Project Detail Page template.

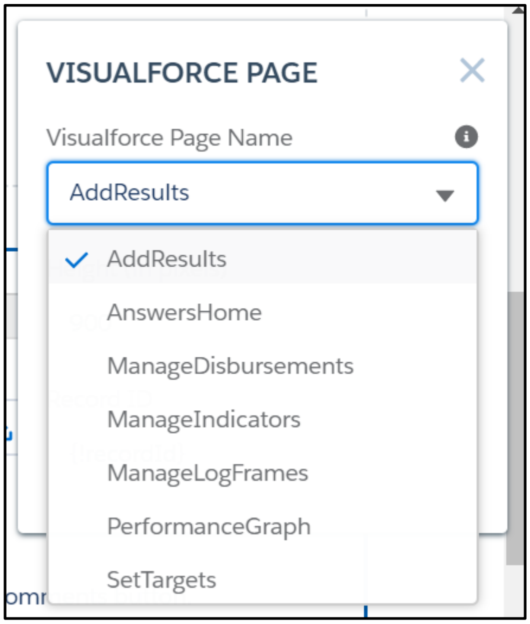
7. Click into the Tab component. Click “Add” and customize the labels of the Visualforce pages or Lightning Component you want to make available in the community.

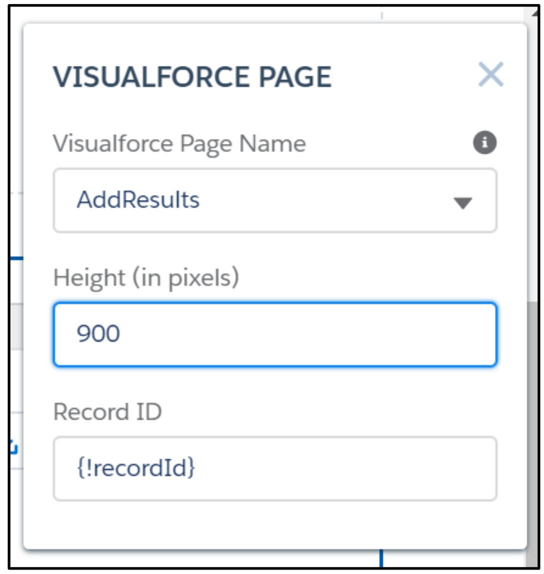


8. Click into a tab (e.g. Add Results). From the Components menu on the left, drag the relevant Lightning Component (i.e. Visualforce Page for AddResults or the custom ActivityChart Lightning Component for Activity Tracking) into the tab's space.



9. If a Visualforce Page was added in the previous step, a popup will appear in the top right. In the popup, select the Visualforce page to display in the tab. Customize as needed the Height (in pixels) field. Leave Record ID at the default value.





10. Repeat Steps 7-9 for each Visualforce page that needs to be made available to community users.

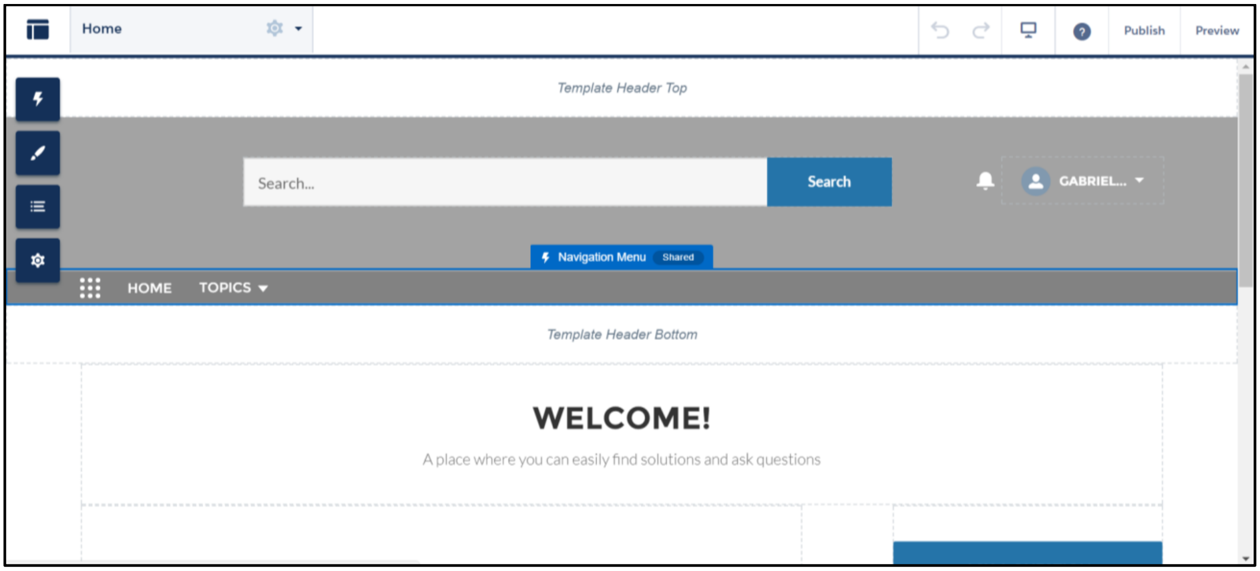
11. To add the custom manageIndicators Lightning Web Component, the Record ID property must be manually set. Input `{!recordId}` into the text field under Record ID so that the component will render properly.
    a. Note this value is case-sensitive and must be entered *exactly* as shown below.

12. Click “Publish”.

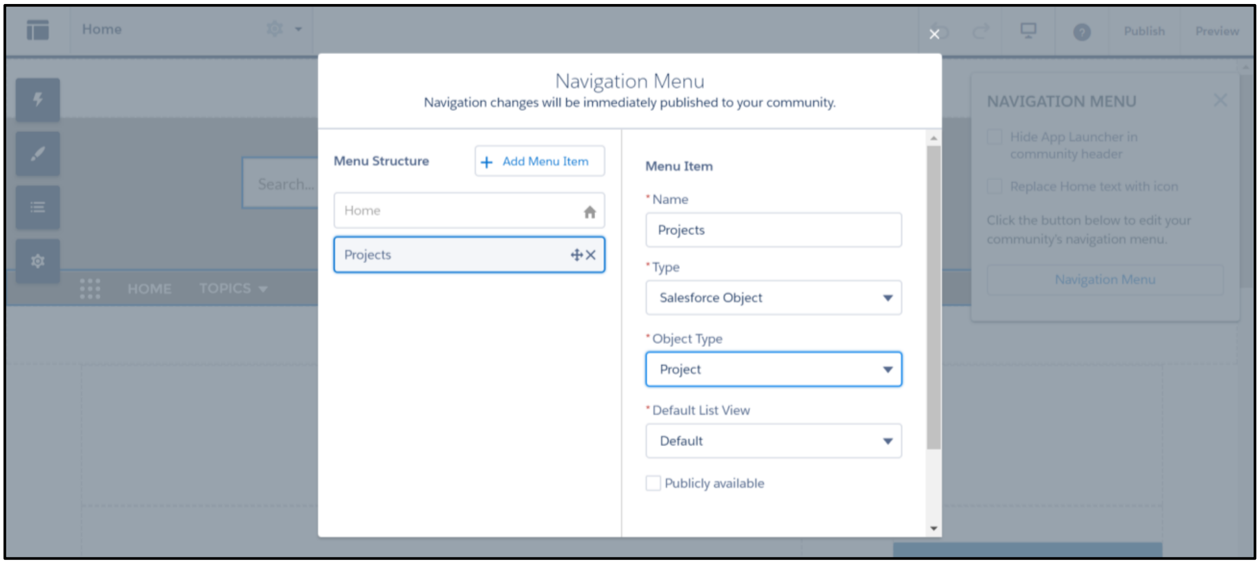
Set Up Submissions

ⓘ The steps in this section are only required if community users will be filling out Submissions. If this is not required for your use case, please skip to the next section. If community users will be using Submissions in another manner (i.e. reviewing submissions), please refer to the Amp Impact Installation Guide to understand how to customise the pages for that use case.

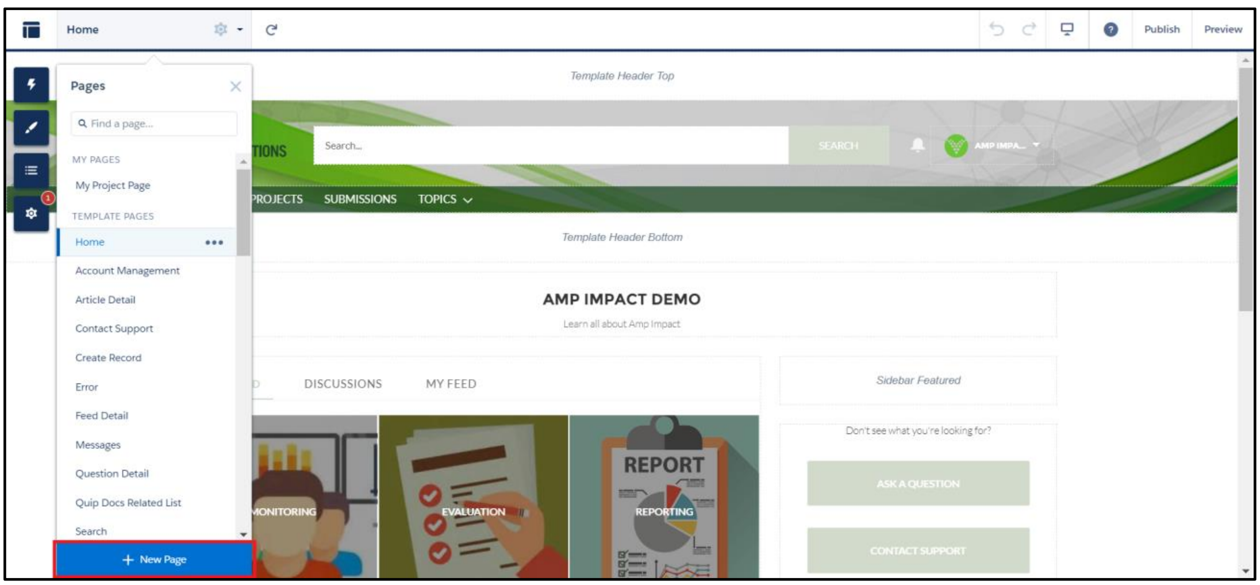
1. Click on the Navigation Menu. A popup will appear on the top right.



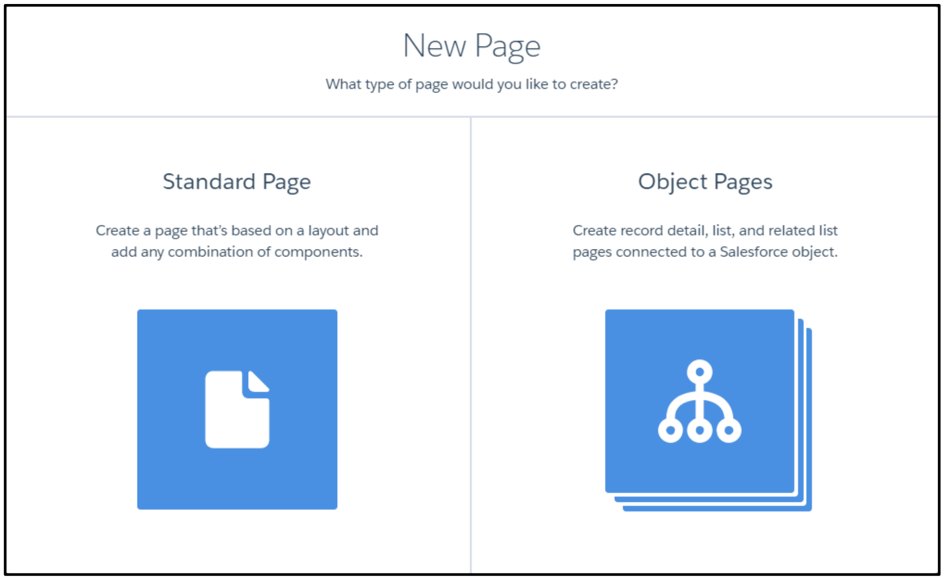
2. Click “Navigation Menu” button. Another popup will appear.
3. Click “+ Add Menu Item” button.
4. Name Menu Item as “Submissions”, select Type as “Salesforce Object”, and select Object Type as “Submission”. You can leave the Default List View at “Default”. Click “Save Menu”.



5. Create a Submission record page in the Community Builder.
    a. Click the dropdown in the top left corner. A picklist will appear.

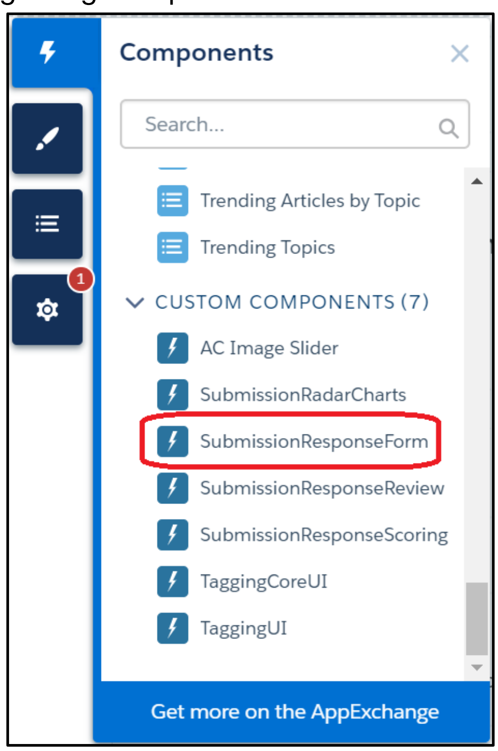


    b. Scroll to the bottom of the Picklist and click the "+ New Page" button. A pop-up will appear.



c. Select "Object Pages".
d. Find and select "Submission" in the list of Objects.
e. Click "Create". You will be navigated to the new Submission Detail Page template.

6. Add the SubmissionResponseForm component to the Submission Detail Page.
   a. Expand the Lightning Components Menu on the left side of the builder.

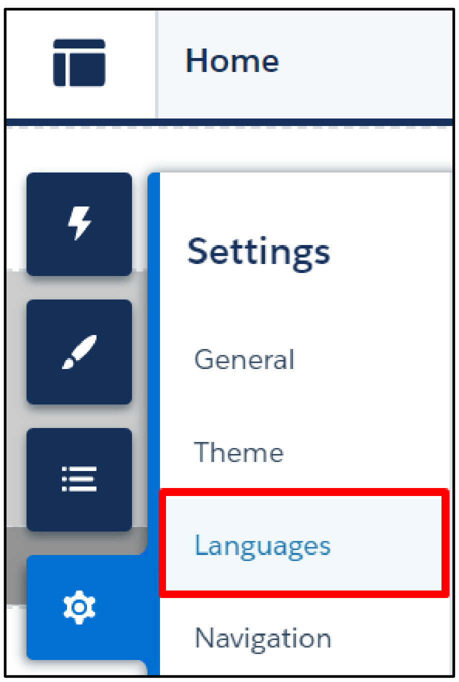


   b. Find the SubmissionResponseForm component in the Custom Components section of the list.
   c. Drag and drop the SubmissionResponseForm below the Record Detail component.
7. Click “Publish”.

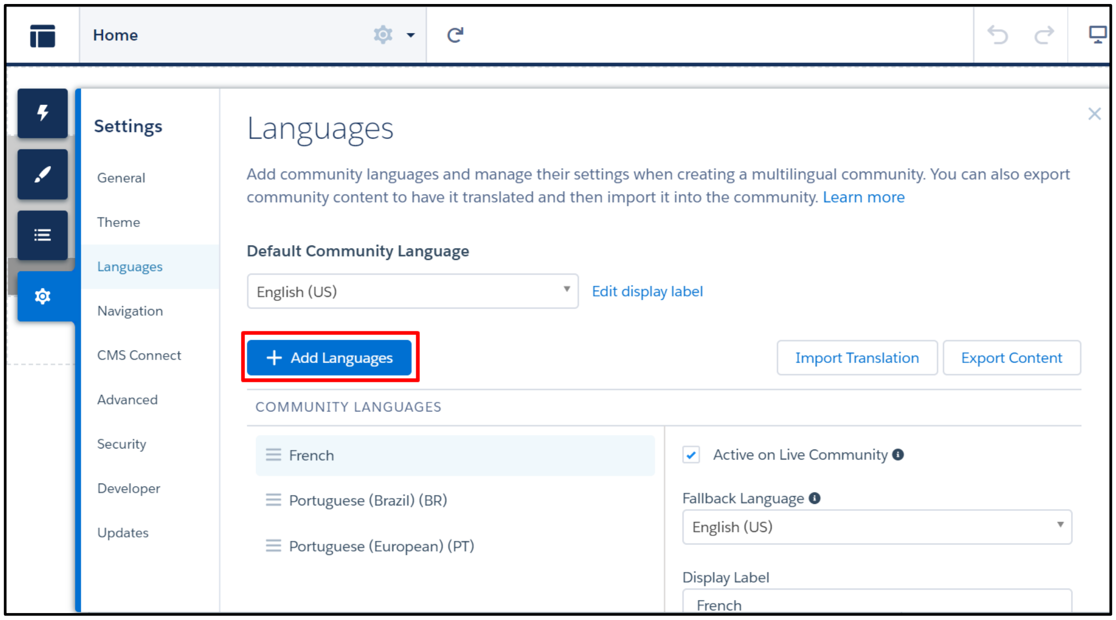
Set Up Multi-Language Capability - *Optional*

This step is for users and systems that utilize the multi-language capability with Amp Impact. To ensure multi-language compatibility of Lightning Web Components for users with non-English user locales, the Community must have Languages enabled.

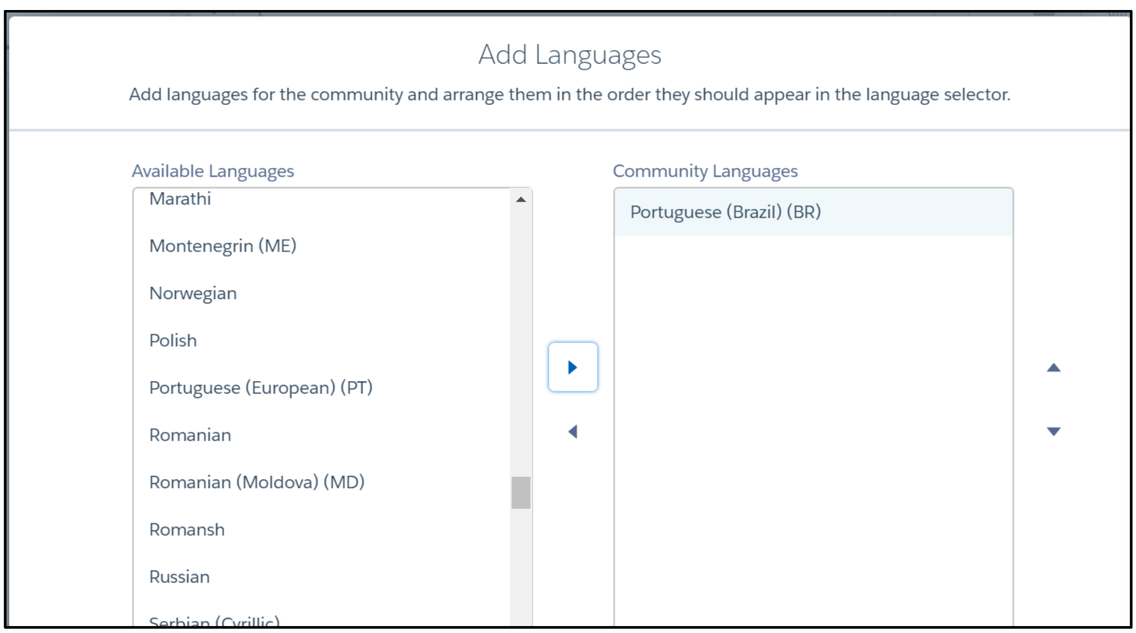
1. Click on the Gear icon to access Settings from Community Builder.
2. Under Settings, click “Languages”.



4. Click “Add Languages”.



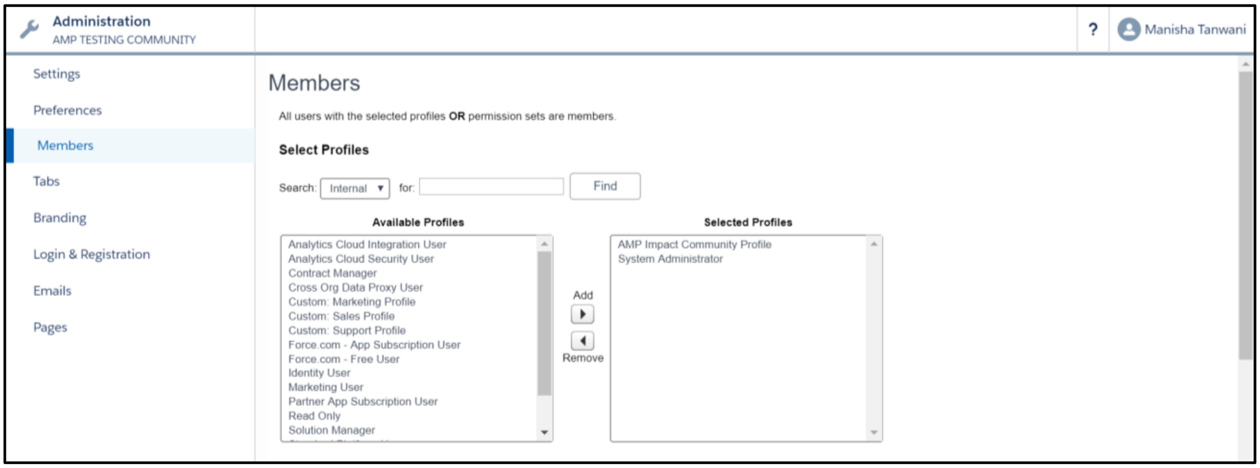
5. Select language(s) from the available languages list and add it to the community languages list.



6. Click “Save”.

In Community Workspace

1. In “Administration”, click “Members”. Add the “Amp Impact Community Profile” to the multi-select picklist. Click “Save”.



2. Click the icon in the top left corner to bring down the sidebar. Click “Settings”, and click “Activate Community”.