



Enabling Standard Objects Edit Permission For **Force.com** Site's Guest Users



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INTRODUCTION

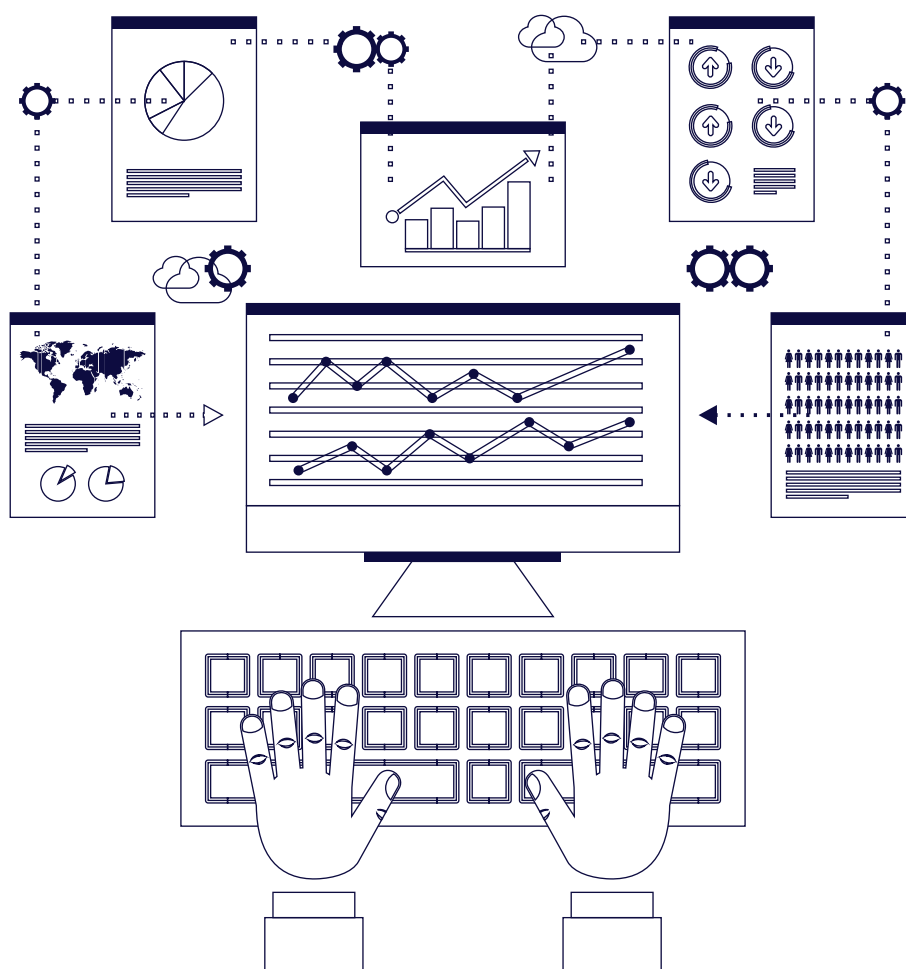
While customizing Salesforce for clients, as developers, you may come across scenarios where the user will not have a Salesforce login as well as a community login. Purchasing a Salesforce license for a minor update or activity might incur heavy license cost for the user, and you cannot dictate your client to do so. At times, medium scale businesses might not have many community requirements. Purchasing community licenses for a user who needs to do some small inputs from customer accounts also can cost them dearly. Such users without multiple requirements mostly depend on Force.com sites' guest user license for gathering customer inputs. This type of guest user license is free of cost. You can actually perform the required tasks as a guest user in Force.com sites.

Many industries using Salesforce will come across similar situations. A common example is that of pharmaceutical companies. There will be opportunities and products in Salesforce.

An opportunity consists of products with quantities. Clients usually want to give provision to their customers to utilize the opportunity before it gets closed. For example, in the case of one of our pharmaceutical clients, we added the "Accept or Reject" feature for their opportunity products, so that the user can accept or reject the product after which the opportunity gets closed.

Generally, pharmaceutical companies have a basket of products for opportunity whose pricing can be fixed after client specifies which all products they need and in what quantity. This can be achieved via a Visualforce page hosted in Force.com sites without any spending on community licenses.

This whitepaper covers a workaround that Suyati's Salesforce team implemented for the pharmaceutical client in force.com to edit standard objects (as Force.com guest user). It is also important to note that edit permission is only an issue with Standard Objects and this is not the case with Custom objects.



THE USE CASE

When a prominent pharmaceutical company approached us, they were facing the following situation:

The Background:

The customer has no access to Salesforce and wanted to take customer inputs for certain standard objects (opportunities and products) as a guest user on Force.com site. And the user neither has a community license, nor a salesforce login. What is the ideal workaround for this problem?

When we referred to the given workarounds in various places, we came across several solutions, but nothing gave us a clear cut answer to resolve this issue.

Many Salesforce orgs need their customer to input from a public URL, in spite of security matters. As mentioned above, though many companies prefer Force.com sites guest user license for gathering customer inputs, the major drawback with the guest user license rises when standard objects need to be updated. It only allows read and create permission for standard objects (although user can be given edit access to custom objects).

The Workflow:

In the case of the pharmaceutical client, the workflow appeared like this:

- The client will have opportunities and products in Salesforce.
- Sales representative (the Salesforce user here) will export the opportunity and product data into an excel sheet from Salesforce.
- The Sales rep will mail this excel sheet to the customer.
- Customer enters the Quantity in the sheet and mails it back to the sales rep.
- Sales rep edits the Salesforce data according to the details given in this sheet.
- The pharmaceutical company decides pricing according to quantity.
- Sales rep exports this updated data again to an excel sheet and mails it to the customer.
- Customer will either Accept or Reject the product. When they reject or accept, the opportunity gets closed.
- Sales rep enters this data again to Salesforce.

This kind of manual workflow consumed a lot of time and also ended up in data duplication and data loss. The procedures also increased the duration of work, making it more tedious and cumbersome.



So, what did we do?

THE SOLUTION

There are many suggested approaches intended to indirectly invoke standard objects through sites. Out of these, the one that requires minimum setup in Salesforce configuration is the use of MAPS. In this approach, instead of using binding variables in Visual

force pages, we use a Map to track the updated fields on the page. The fields are just standard HTML input fields. The value in the field will be the value of the Map with ID as the corresponding key.

In our solution, basically what happens behind the scene is described below:

- There is no direct binding of a field from Visualforce page to the database.
- Whatever change that is made in the page is captured in the apex class. Here, a map is created which maps the user input value to a unique ID of the record that needs to be updated.
- Using the unique IDs, the apex fetches all the records from the database and manually updates the database with the corresponding value present in the map.
- This approach eliminates the need of using dummy objects and extra trigger to get the job done.

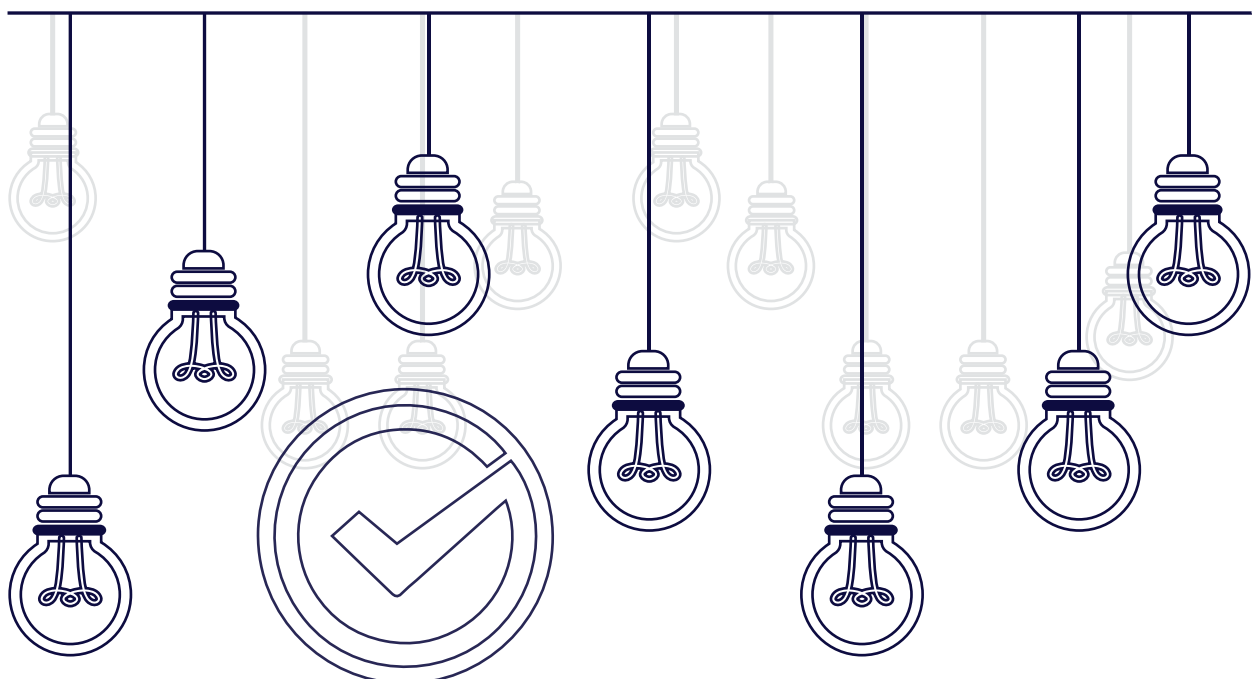
Ideally we set the solution on the Visualforce page to work like this:

The guest user is given a Visualforce page URL with the OpportunityID *mentioned* in the below format:

`http://name/id-xxxxxxxxxxxxxxxxxx/`

The opportunity ID is a 15digit number specific to that opportunity. The client can view all the product details on the Visualforce page related to that particular opportunity ID. When the client makes an update to any product details the same get updated in the data

base as well. Similarly, changes made to the DB will be reflected in the Visualforce page also. This happens due to the binding between Visualforce page and the DB. The Apex code acts as the mediator facilitating the back and forth journey of data.



ADVANTAGES OF THE SOLUTION

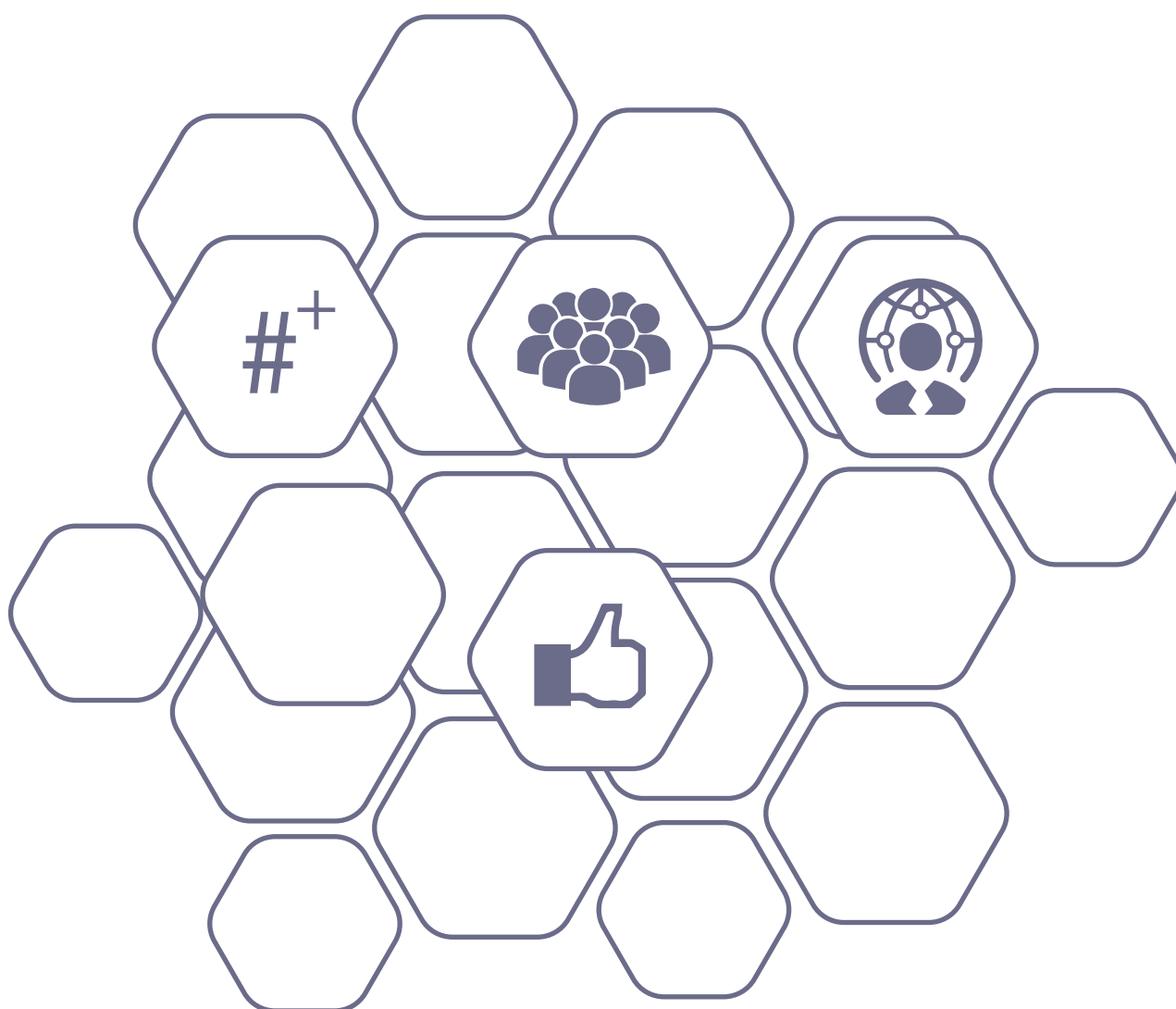
- **Saving cost and time:** As described in the use case, the whole process of sending Excel sheets back and forth consumes a lot of time. Automating the workflow saves cost and time considerably. The customer will get a mail with a link to the opportunity ID and they can make the updates using the given URL. The changes made by the customer will get updated in Salesforce database as well. This also speeds up the procedures.
- **Avoids duplication and data loss:** Using the Excel sheets to update and re-update data can result in double entries and data loss. However, cautious you are, the manual processes along with the bulk amount of data can lead to errors. Such double data entries and data loss can be done away with the proposed solution.
- **Security:** There could be discussions on how secure this solution can be, since no user authorization is required in this scenario. The URL sent to the customer is a unique ID which is difficult to decrypt. Adding a strong layer of security encryption to this, we can encode the URL for the Visualforce page while sending it to the customer. This will assure the confidentiality of customer data and also makes the procedures hassle-free and fast.



SUYATI'S SALESFORCE CAPABILITIES

Suyati is a Salesforce AppExchange Partner with core capabilities in Salesforce 1, Lightning, Community, Analytics Cloud, Salesforce IQ, to name a few. Take a look at our strengths below:

- 30+ Salesforce developers
- DEV 401 certified developers
- 130+ modules with around 1 million LOC delivered successfully
- 5+ years of experience with global clients
- Strong footing on Force.com platform
- Salesforce ISV Partner
- Created SaaSpie.com- a cloud enthusiasts' community





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ABOUT SUYATI

Suyati is a fast-growing, digital transformation solutions company that helps you rebuild your customer experience for the digital consumer. We collaborate with businesses to strategize and implement impactful digital initiatives that position our clients ahead of the competition. We are digital-first and we focus on delivering digital transformation solutions that support your various engagement strategies. With our niche and rich expertise in a wide range of technologies and services-

CMS, CRM, e-commerce, Cloud, IoT, Data Analytics, and Product Engineering- we help companies leverage their best on web/cloud/mobile platforms.

We enable you to create insights driven customer engagement across all touch points to build a unified marketing approach. Our custom technology solutions have been deployed successfully in companies across the globe, especially in the US, UK, Europe and Australia.



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Reference:

<http://salesforce.stackexchange.com/questions/33796/input-field-on-force-com-sites-update-standard-object-from-guest-user-force-com>