KB: Manually configure B2B permissions

If you installed "Hubcase for Salesforce" for admin only, and now you have created a profile, and want the profile to have B2B capability. The following outlines the optimal set of permissions needed for a profile. However, you could fine tune permissions for different profiles and needs.

B2B Escalation permissions need be assigned in four areas:

1. Object level:

Custom Object Permissions

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
B2B Escalation	✓	✓	☐	☐	☐	☐
hx_encryptions	✓	✓	☐	☐	✓	☐
hx_fromhubqueue	✓	✓	✓	✓	✓	✓
hx_partner_cache	✓	✓	✓	✓	✓	✓

You will need to Edit the profile, and check like the above.

For a "Read Only" user, you will only need to check "Read" on the "B2B Escalation" line.

2. Field level.

You will need to open the profile (in view/read mode), and locate "Custom Field-Level Security" section.

Custom Field-Level Security

B2B Escalation	[View]
hx_encryption	[View]
hx_fromhubqueue	[View]
hx_partner_cache	[View]

Click on "View" and then "Edit" the field permission for the object. Basically you will need to check "Visible" for all the fields. You need to repeat the steps for all the four objects above.

3. Apex Class.

The following classes are required:

Enabled Apex Class Access [Edit]

Apex Class Name

hx.EscalateToPartnerController

hx.GetDataFromHubQueue

hx.PostToHubController

hx.ScheduledPostToHub

hx.SetPartnerKeyController

hx.Util

hx.ViewEscalationController

You will need to open the profile (in view/read mode), and the above section. And the "Edit". In the Edit screen, move the above Classes to the right side, then save.

4. Visualforce Pages

Enabled Visualforce Page Access [Edit]

Visualforce Page Name

hx.EscalateToPartner

hx.GetDataFromHubQueue

hx.PostToHub

hx.SetPartnerKey

hx.ViewEscalation2

You will need to open the profile (in view/read mode), and the above section. And the "Edit". In the Edit screen, move the above Pages to the right side, then save.

Note A: You will also need to configure the case page layout for the profile so that the B2B functions are exposed on the case form. Please see Installation Guide for details.

<u>Note B</u>: It's also possible to use permission set and assign permissions to individual users. Hubcase for Salesforce comes with "HX Permission Set", but due to Salesforce restrictions, the package was not allowed to include object level permission for "B2B Escalation" object in the package. Two ways to go if "HX Permission Set" is to be used.

- Clone the packaged permission set to a new one "HX Permission Set 2", and then modify new permission set add "Read / Create" for object B2B Escalation at object level.
- Use packaged permission set, and additionally in the user's profile, add permission "Read / Create" to object B2B Escalation.