



[GREEN CARD LOGO]

## Green Card

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**Version 1.0**

# Green Card – Training Module

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# Green Card – Training Module

## Introduction

If you ever need to automate the upgrade path from Customer Community Plus to Partner Community using declarative features available in Salesforce – Green Card is what you want! A typical use case is business processes mandating potential partners to be accredited via a Customer Community Plus site and once approved, moved to a Partner Community for ongoing collaboration and management of their sales pipelines. There might be a significant backlog of partners to migrate over and the process might be expected to continue into the foreseeable future.

Green Card automates the migration from Customer Community Plus to Partner Community using declarative features available in Salesforce.

The guiding principles of the design are:

- Use only declarative features available in Salesforce.
- Implement “Best Practices” to drive process efficiency, maximize user productivity and secure an optimum pathway for future needs.

## Process Flowchart

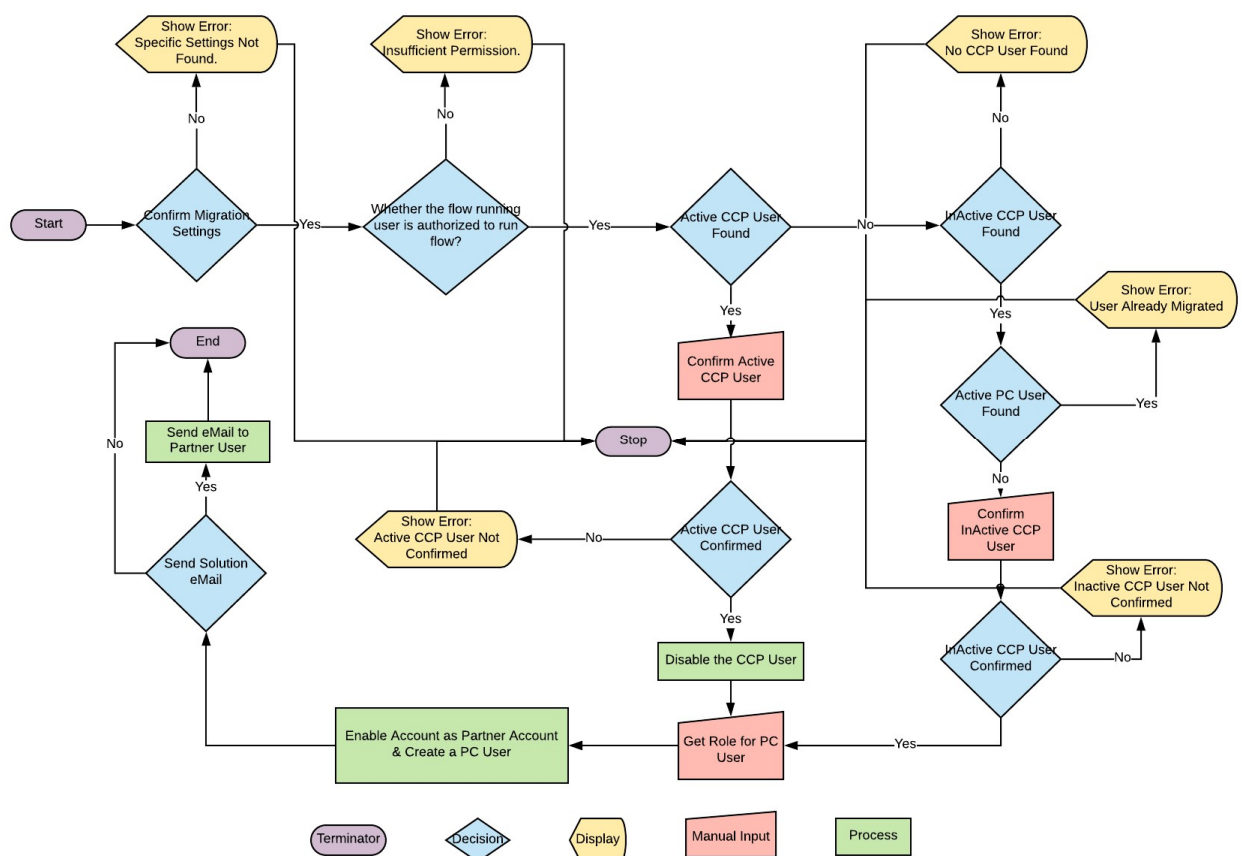


Figure 1

# Green Card – Training Module

## Installation Steps

### 1. Update the custom settings “Migration Details”

Please populate the Default Organization Level Value

- Allow Solution to Send eMail: If ticked, the user that is migrated to Partner User will receive a Salesforce welcome email as per the eMail Template configured in solution.
- Community URL: Add the community URL of your Partner Community but only up to the “.com”
- Partner Suffix: Adds a suffix so that the nick name of the user is unique.
- Source Profile Name: Add the profile that is being used for the Customer Community Plus user.
- Target Profile Name: Add the profile that will be used for the Partner community user.

Refer below example of custom settings configuration:

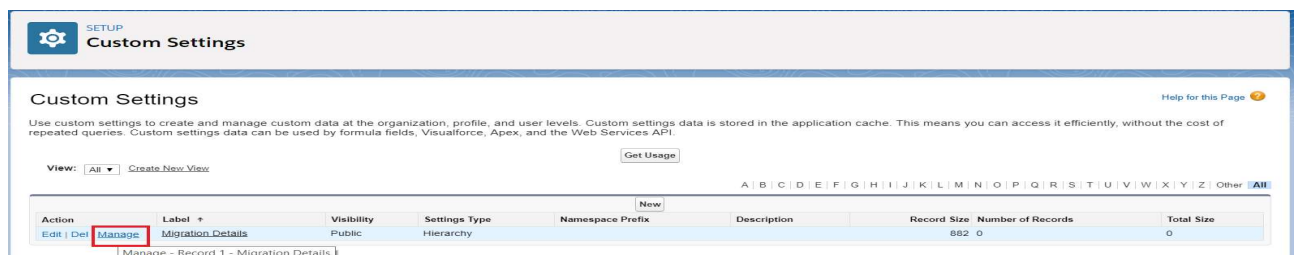


Figure 2

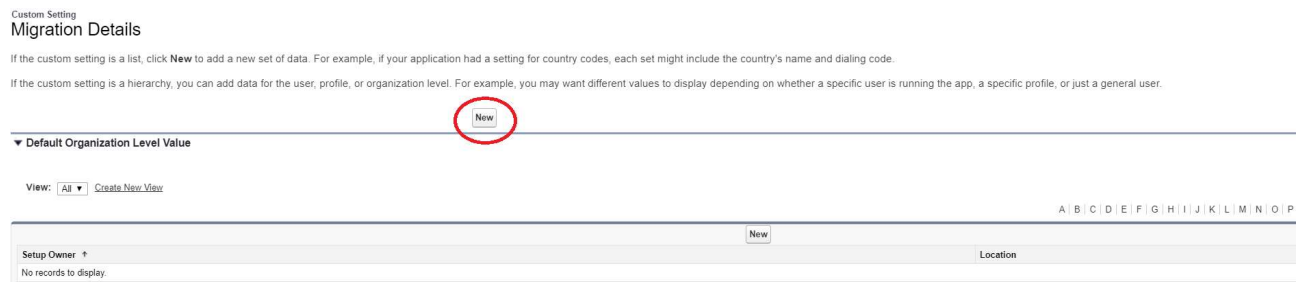


Figure 3

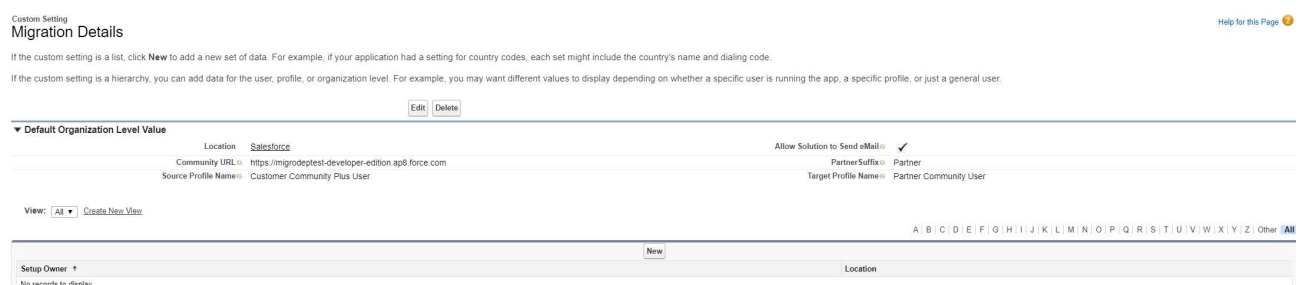


Figure 4

### 2. Assign a permission set to the running user

Go to setup/users/ and select the user(s) who will be using Greencard and then add the “Migrate CCP to PC” permission set to the user record. Refer below example of the permission set to add:

# Green Card – Training Module

Available Permission Sets

- CRM User
- Dialer Inbound
- Dialer Minutes
- Dialer Outbound
- Einstein Analytics Platform Admin
- Einstein Analytics Platform User
- Einstein Analytics for Sales Cloud
- Event Monitoring Analytics Admin
- Event Monitoring Analytics User
- Inbox With Einstein Activity Capture

Enabled Permission Sets

- Case Feed
- Live Agent
- Migrate CCP to PC
- Social Customer Service Inbound Automation

Save Cancel

Figure 5

If you do not assign the above permission set, user will get the following error.

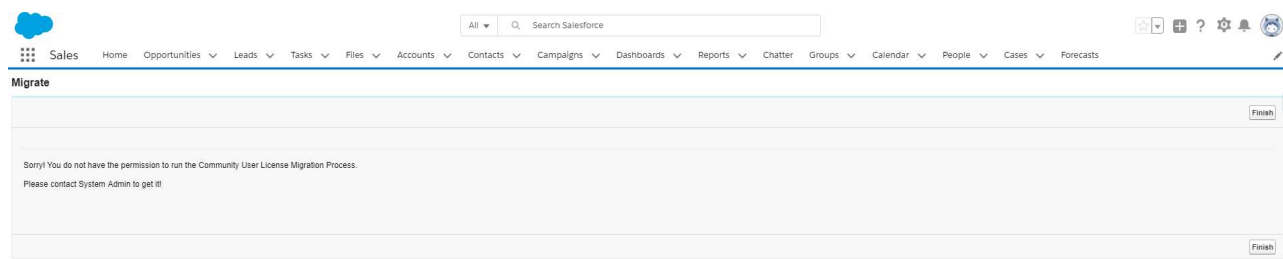


Figure 6

Open and edit the permission set “Migrate CCP to PC” and tick the “Manage User” check box in system settings:

▼ Users

Permission Name	Enabled	Description
Assign Permission Sets	<input checked="" type="checkbox"/>	Assign permission sets to users.
Enable RecordVisibility API	<input type="checkbox"/>	Retrieve record visibility information.
Manage Internal Users	<input checked="" type="checkbox"/>	Create and edit internal users.
Manage IP Addresses	<input checked="" type="checkbox"/>	Create, edit, and delete trusted IP ranges.
Manage Login Access Policies	<input checked="" type="checkbox"/>	Specify the login access policies that apply to administrators and support organizations.
Manage Password Policies	<input checked="" type="checkbox"/>	Set password restrictions and login lockout policies for all users.
Manage Profiles and Permission Sets	<input checked="" type="checkbox"/>	Create, edit, and delete profiles and permission sets.
Manage Roles	<input checked="" type="checkbox"/>	Create, edit, and delete roles.
Manage Sandboxes	<input type="checkbox"/>	Create and edit sandbox and sandbox templates.
Manage Sharing	<input type="checkbox"/>	Create, edit, and recalculate sharing rules, edit organization-wide defaults, and enable the external sharing model.
Manage Users	<input checked="" type="checkbox"/>	Create, edit, and deactivate users, and manage security settings, including profiles and roles.
Reset User Passwords and Unlock Users	<input checked="" type="checkbox"/>	Unlock users whose accounts are locked, and reset user passwords.
View All Users	<input checked="" type="checkbox"/>	View all users, regardless of sharing settings.

Figure 7

Open and edit the permission set “Migrate CCP to PC” and tick the “Manage External Users” check box in app settings:

# Green Card – Training Module

**SETUP**  
**Permission Sets**

Knowledge One	<input type="checkbox"/>	Replaces the Articles tab with the Knowledge tab.
Manage Articles	<input type="checkbox"/>	Create, edit, assign, publish, delete, and archive Salesforce Knowledge articles.
Manage Knowledge Article Import/Export	<input type="checkbox"/>	Allows user to manage all the Knowledge Article Import/Export
Manage Salesforce Knowledge	<input type="checkbox"/>	Manage Salesforce Knowledge settings, and create, edit, and delete article types.
Share internal Knowledge articles externally	<input type="checkbox"/>	Allow user to share internal Knowledge articles externally

▼ **Partner Relationship Management**

Permission Name	Enabled	Description
IP Restrict Requests	<input type="checkbox"/>	Restrict what IP addresses can access in the PRM Portal.
Manage External Users	<input checked="" type="checkbox"/>	Create partner accounts and partner users.

▼ **Sales**

Permission Name	Enabled	Description
MISSING LABEL: PropertyFile - val LeadQRReservedUserPerm not found in section UserPermissions	<input type="checkbox"/>	Reserved for future.
Access Dialer Inbound Calls	<input type="checkbox"/>	Receive inbound calls with Voice.
Access Dialer Minutes	<input type="checkbox"/>	Add the minutes related to Voice calls.
Access Dialer Monitoring	<input type="checkbox"/>	Enables Monitoring for Voice Calls.
Access Dialer Outbound Calls	<input type="checkbox"/>	Make outbound calls with Voice.
Access to view Data Assessment	<input type="checkbox"/>	Access to view Data Assessment. Data Assessment provides a summary of the state and quality of the org's CRM data
Activate Contracts	<input type="checkbox"/>	Change contract status to Activated.

Figure 8

## 3. Assign a custom button to the contact page layout

Go to setup/object manager/ and find the contact object and select “Page layouts”. Select the page layout you would like to add the Greencard button. Add the lightning button to the “Lightning Mobile and Lightning Experience Actions”. You also have the option in classic. Refer below for the typical button setup:

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Mobile Action Name

Fields Buttons Custom Links Quick Actions Mobile & Lightning Experience Actions Expanded Lookups

Call Clone Disable Partner User Edit Get Survey Invita... Log in to Portal ... New Case New Lead

Change Owner Delete Enable Customer User Enable Partner User Link Migrate User from... New Contact New Note

Change Record Type Disable Customer ... Label: Delete Name: Delete Log a Call Mobile Smart Actions New Event New Opportunity

Check for New Data Disable Partner S... Log in to Commun... New Account New Group New Task

This item is currently in use (click to locate)

sarah.sample@company.com

Quick Actions in the Salesforce Classic Publisher

Post File New Task Log a Call New Case New Event Link Poll Email

Salesforce Mobile and Lightning Experience Actions

Sharing Printable View View Customer User Check for New Data Enable Super User Access Log in to Community as User Clone Edit

Get Survey Invitation Change Record Type View Contact Hierarchy Change Owner Enable Partner User Enable Customer User Disable Partner User

Delete Log in to Portal as User

Disable Customer User View Partner User Disable Partner Super Access Submit for Approval Call Send Text Email (mobile only)

Migrate User from CCP to PC

Figure 9

## 4. Modify the email template

Go to setup/email/classic email templates/. Find the “Communities: Migrate from CCP to PC Email” template in the “Customer to Partner Community Migration” folder:

# Green Card – Training Module

SETUP  
Classic Email Templates

Customer to Partner Community Migration

Classic Email Template Availability

Folder: Customer to Partner Community Migration ▼ Edit | Create New Folder

A B C D E F G H I J K L M N O P Q

Action	Email Template Name	Template Type	Available For Use	Description
Edit   Del	Communities_Migrate from CCP to PC Email	Text	✓	Notification of new password when a user's password is reset (because they migrated from CCP to PC)

A B C D E F G H I J K L M N O P Q

Figure 10

Modify the “MigroDemo” name in the URL link with the name of the Partner Community:

Before:

SETUP  
Classic Email Templates

Email Template Edit

Save Save & New Cancel

Email Template Information

Folder: Customer to Partner Community Migration ▼

Available For Use: ☒

Email Template Name: Communities\_Migrate from

Template Unique Name: Communities\_Migrate\_from

Encoding: Unicode (UTF-8)

Description: Notification of new password when a user's password is reset (because the

Subject: Please Reset Password for Enhanced Privileges

Email Body

Hi {!Target\_User Name},

Congratulations! You have now enhanced privileges to view, manage & create Leads and Opportunities.

To start this process please reset your password by completing the following steps:

1. Click on this link  
(! \$Setup.Migration\_Details\_\_c.Community\_URL\_\_c - "/MigroDemo/s/login")
2. Click on "Forgot your password?" on the login page.
3. Enter your email: (!Target\_User.Email)
4. You will receive a second email containing reset link valid for 24 hours. Please click this link and reset your password.

If you have any further questions or issues please contact our Partner Support Team.

Regards,  
Partner Support Team

Save Save & New Cancel

Figure 11

After:

SETUP  
Classic Email Templates

Email Template Detail

Edit Delete Clone

Folder	Customer to Partner Community Migration	Available For Use	✓
Email Template Name	Communities_Migrate from CCP to PC Email	Last Used Date	
Template Unique Name	Communities_Migrate_from_CCP_to_PC_Email	Times Used	
Encoding	Unicode (UTF-8)		
Author	Venkat.MDTU.Amiya.MDep.test [Change]		
Description	Notification of new password when a user's password is reset (because they migrated from CCP to PC)		
Created By	Venkat.MDTU.Amiya.MDep.test, 28/03/2019 10:08 AM	Modified By	Venkat.MDTU.Amiya.MDep.test, 28/03/2019 10:32 AM

Edit Delete Clone

Email Template

Send Test and Verify Merge Fields

Subject: Please Reset Password for Enhanced Privileges

Plain Text Preview

Hi {!Target\_User Name},

Congratulations! You have now enhanced privileges to view, manage & create Leads and Opportunities.

To start this process please reset your password by completing the following steps:

1. Click on this link  
(! \$Setup.Migration\_Details\_\_c.Community\_URL\_\_c - "/tgc001/s/login")
2. Click on "Forgot your password?" on the login page.
3. Enter your email: (!Target\_User.Email)
4. You will receive a second email containing reset link valid for 24 hours. Please click this link and reset your password.

If you have any further questions or issues please contact our Partner Support Team.

Regards,  
Partner Support Team

Figure 12



# Green Card – Training Module

## Using the Green Card

Green Card is now ready to migrate your Community Plus users to Partner community. Go to the contact of the Community Plus user you would like to migrate. Select “Migrate user from CCP to PC” from the drop down actions list.

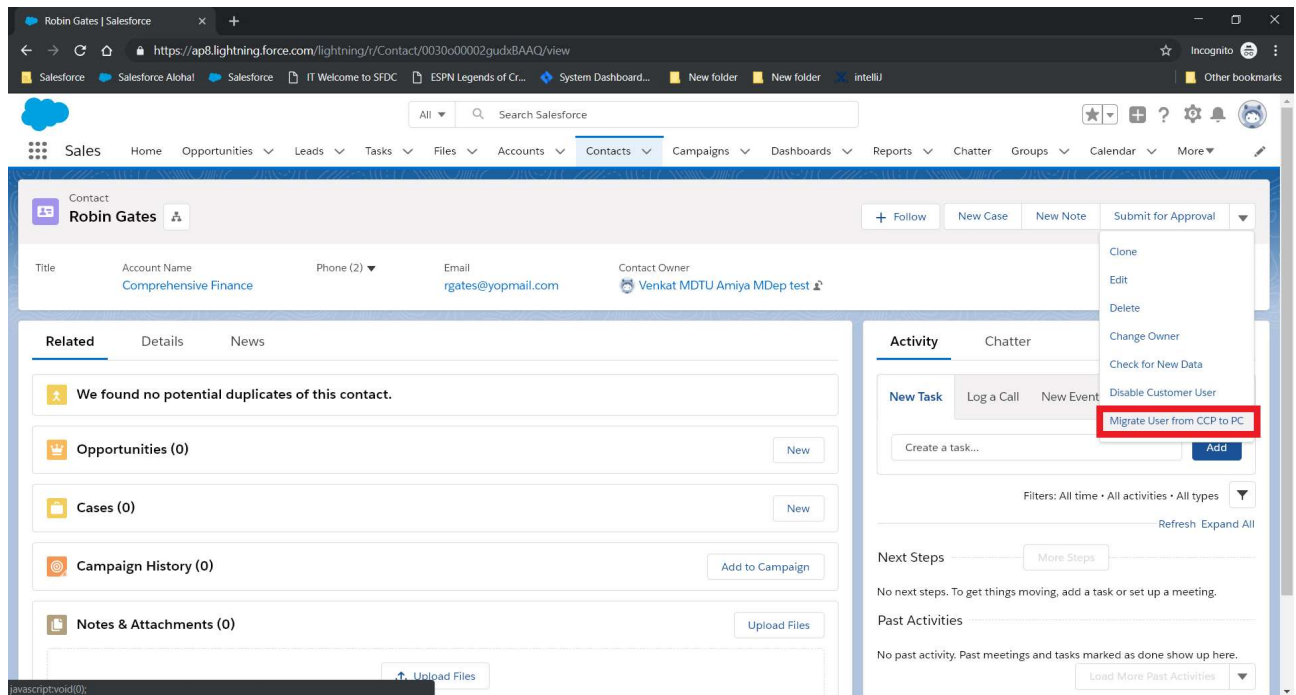


Figure 13

Confirm the user you are going to migrate:

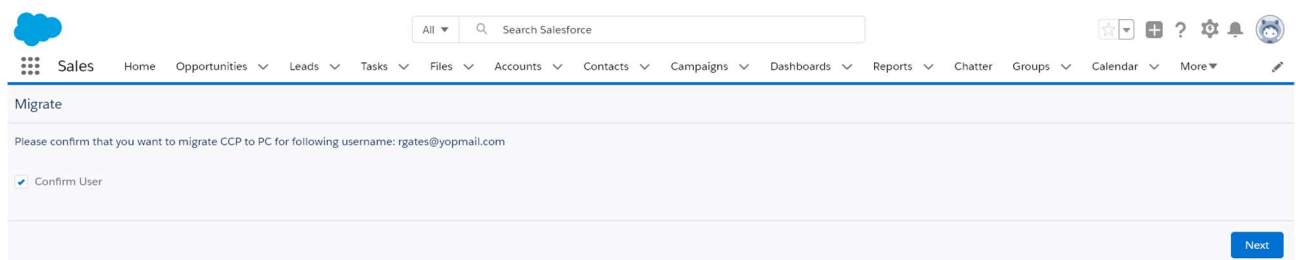


Figure 14

Select Partner Role if Displayed. For the first user enabled on a partner account there will be no option to select a Partner Role. This user always takes a user level Partner Role.

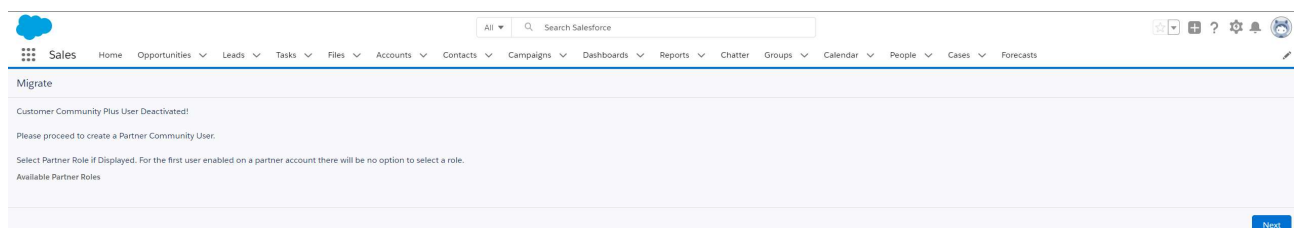


Figure 15



# Green Card – Training Module

In case no Partner Role is selected, user level Partner Role is assigned to the user.

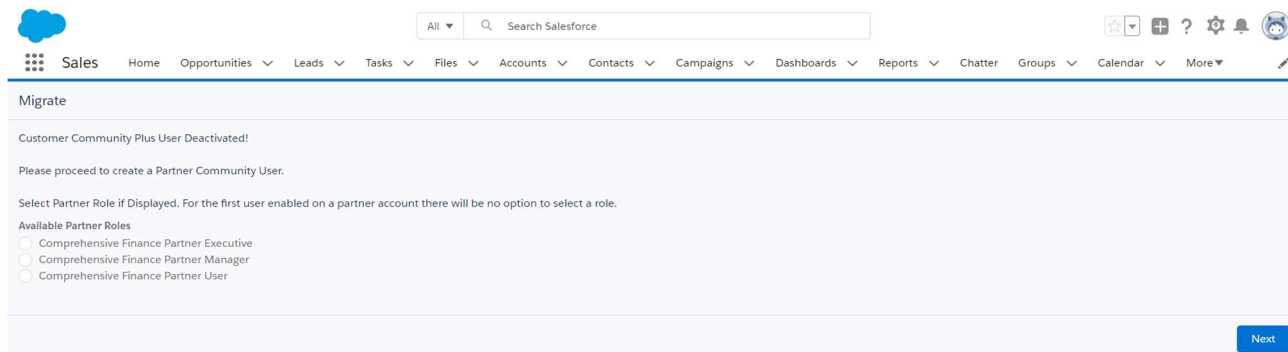


Figure 16

When you select next the process will be complete and your Community Plus user will now be a Partner Community user. Screen is refreshed with contact screen to mark the end of migration process.

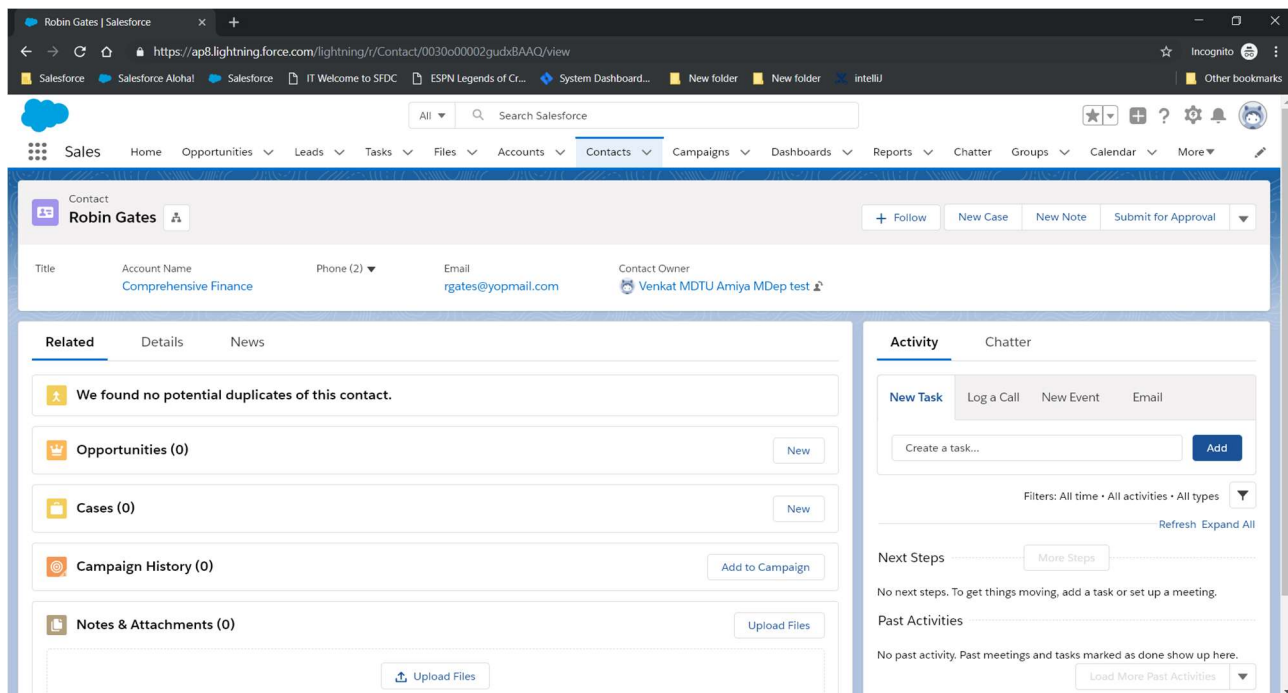


Figure 17

# Green Card – Training Module

End Customer gets an email as below.

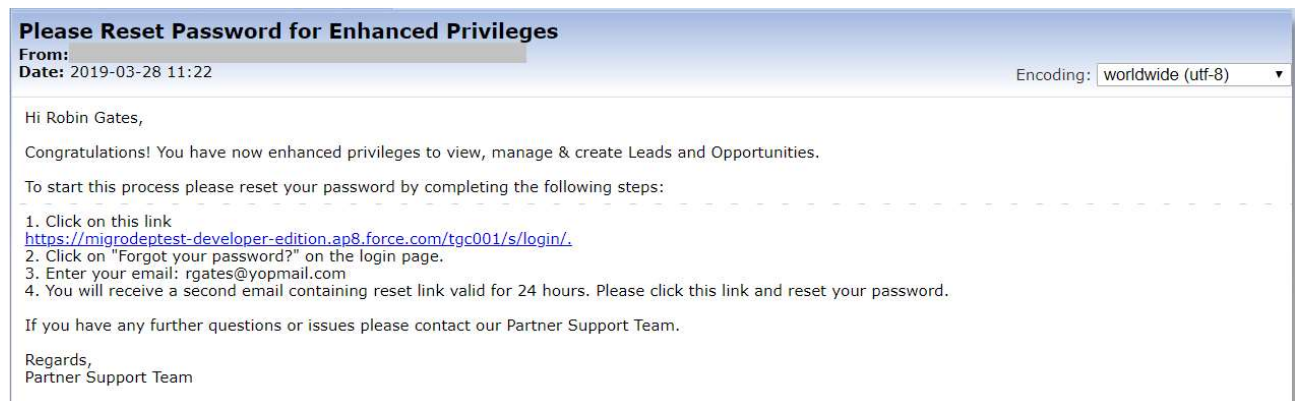


Figure 18

## Solution Components

1. Custom Settings – A custom setting “Migration Details” has been created to capture the details of migration.
2. Custom Permission – A custom permission “Migrate CCP to PC” has been created to permit only users having this permission to be able to run the flow.
3. Permission Set – A permission set “Migrate\_CCP\_to\_PC” has been created to grant Users necessary permissions besides the custom permission “Migrate CCP to PC” to be able to perform migration. The permission set includes following permissions
  - a. Custom Permission “Migrate\_CCP\_to\_PC”.
  - b. System Permission “Manage Users”.

NOTE: Giving this permission automatically assigns a set of other permissions to Users.

  - c. App Permission – “Manage External Users”.
4. Email Template – “Communities: Migrate from CCP to PC Email”.
5. Email Template Folder – Above email template is stored in an email template folder “Customer to Partner Community Migration”.
6. Email Alert – “CCP to PC Migration Email Alert” is the email Alert called upon by flow to send email.
7. Detail Page Button – A button “Migrate User from CCP to PC” has been added to Contact object. This button invokes the flow.
8. Flow – “Migrate” is the flow which is invoked by the button “Migrate User from CCP to PC” and where all the processing of the migration happens.

# Green Card – Training Module

## FAQs

### What happens if the end user accidentally loses session while running flow?



No worries! Solution is robust enough to be rerun! Simply rerun the process for the same contact. In case session is lost after CCP user is deactivated, Solution looks for a deactivated user having the email id of contact and CCP profile. User has to confirm the deactivated CCP user as in below screenshot.

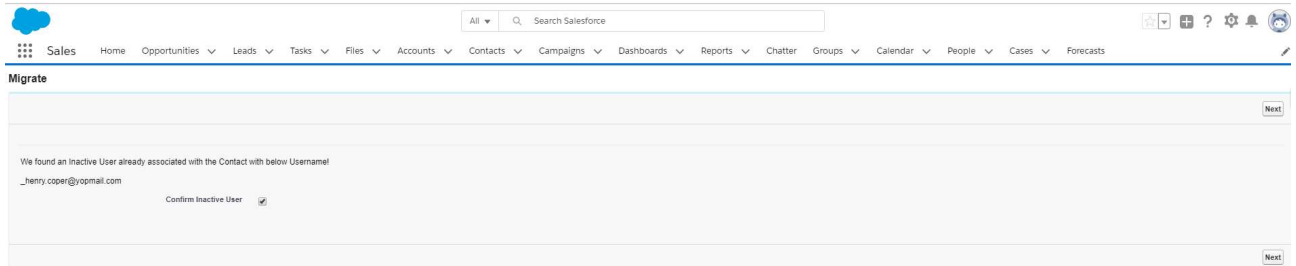


Figure 19

### What are the options for managing the password across migration?

You can explore using one of the following methods to either reset or migrate password.



- `System.resetPasswordWithEmailTemplate(userId,sendUserEmail,emailTemplateName)` - Password link is valid only for 24 hours. After 24 hours users have to follow the regular “Forgot your password?” link to reset password.
- `System.movePassword(targetUserId,sourceUserId)` – Migrate password from CCP to PC user. This function exposes a security risk and as such is enabled only after a written consent from customer.

### What are the alternate solutions possible for binding the migration with an event like status change?

You can explore using one of the following options as per the use case.



- Auto Launched Flow- Use wait element to create new transactions in order to avoid mixed DML errors.
- Apex and Visualforce - Use future annotation to create new transactions in order to avoid mixed DML errors.

As these run in System Mode, User permission requirements become relaxed. Another point to note is that deactivation of CCP users happens near real time, not real time. As such creation of PC users should happen after an appropriate gap which will not be noticeable to end user.



### What are the options for doing bulk CCP to PC user migrations?

You can explore using either Batch Apex or Data Loader as per the use case.

## Glossary

Acronyms	Abbreviations
CCP	Customer Community Plus
PC	Partner Community