



[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

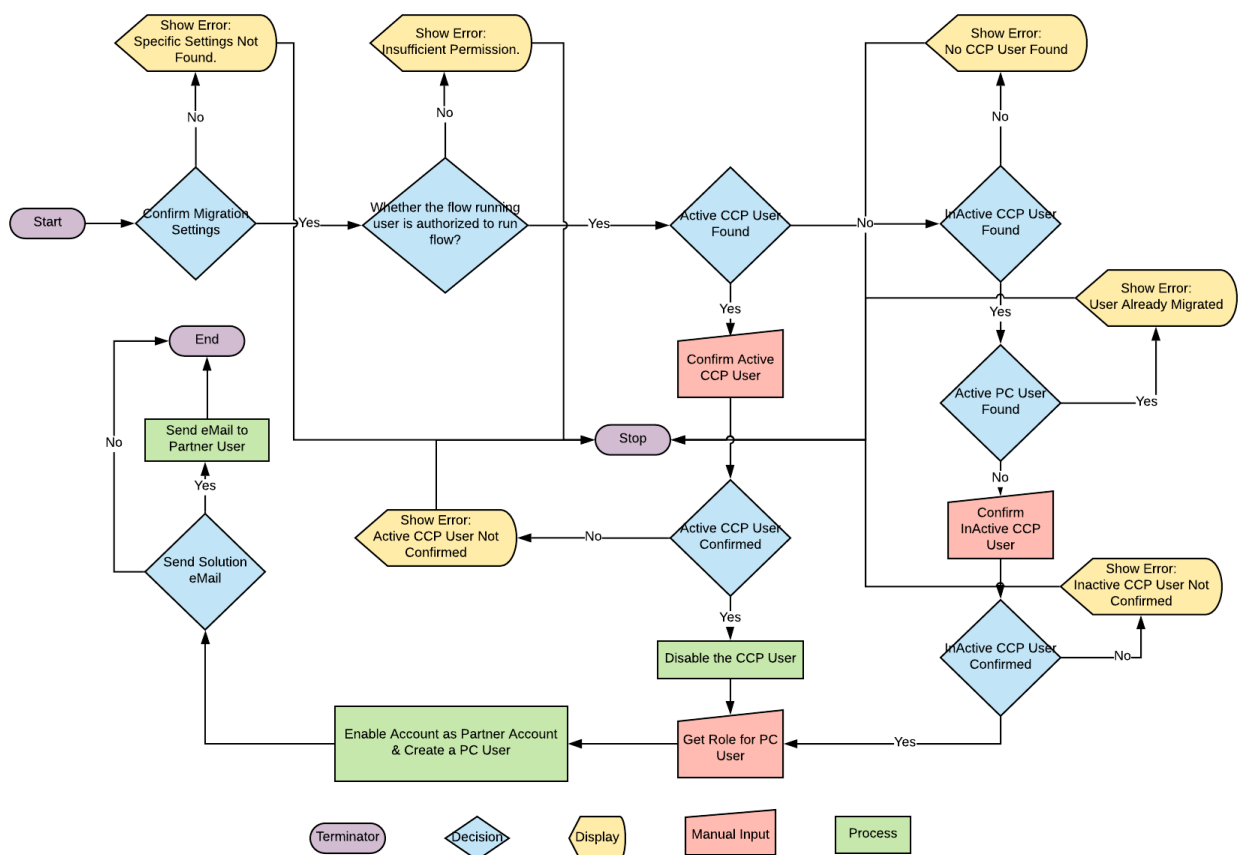


Figure 1

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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:

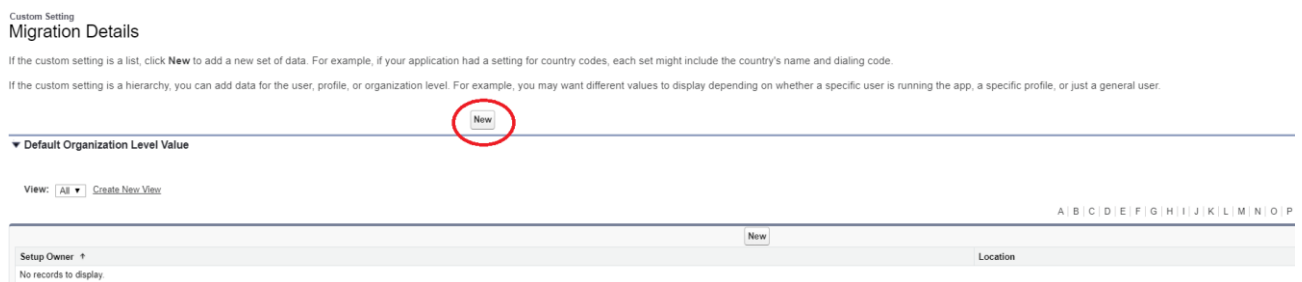


Figure 2

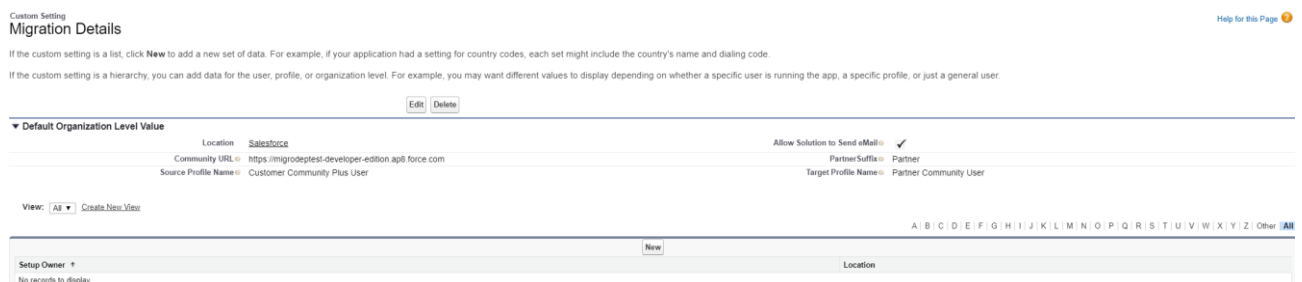


Figure 3

2. Assign a permission set to the running user

Go to Setup > Permission Sets. Clone “Migrate CCP to PC” Permission Set to “Migrate CCP to PC Plus System Permission”. Add "Manage User" permission to "Migrate CCP to PC Plus System Permission" permission set.

▼ 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 4

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Add "Manage External User" permission to "Migrate CCP to PC Plus System Permission" permission set.

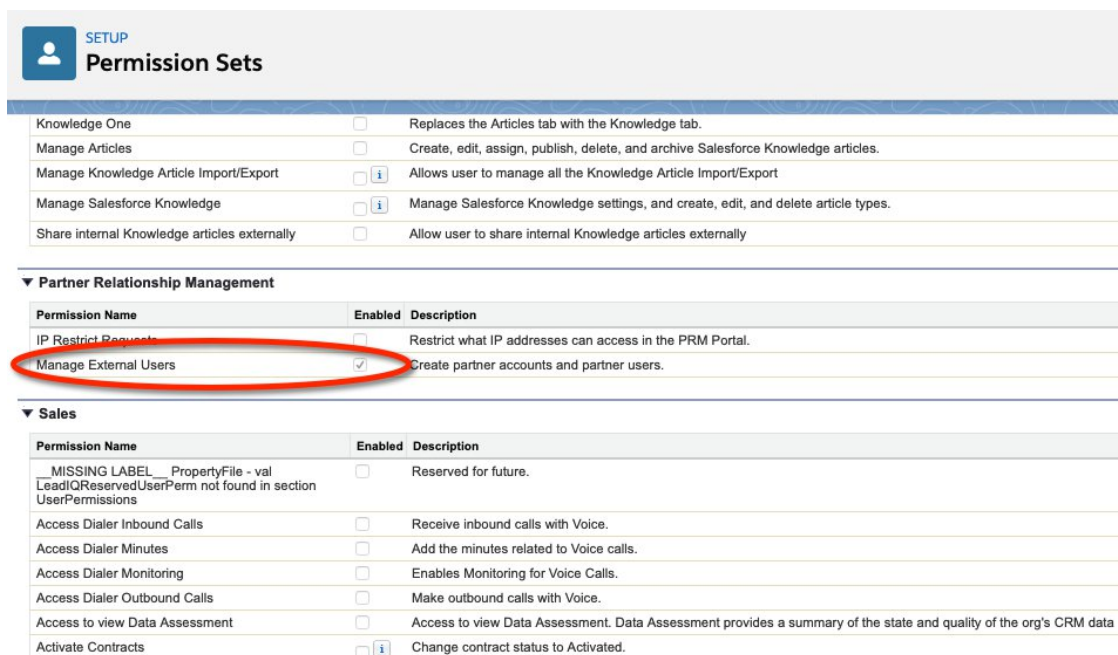


Figure 5

Assign Permission Set "Migrate CCP to PC Plus System Permission" to the running User.

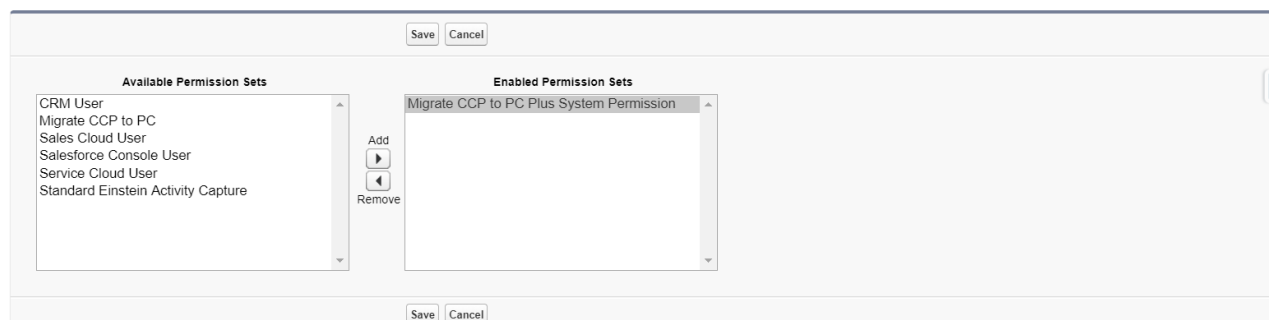


Figure 6

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

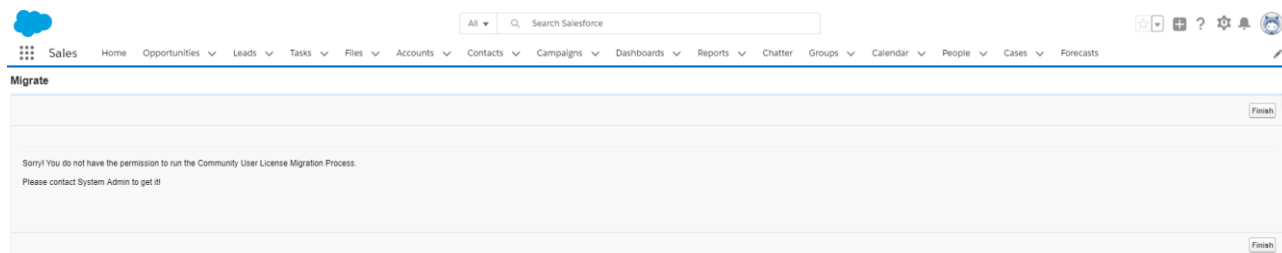


Figure 7

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:

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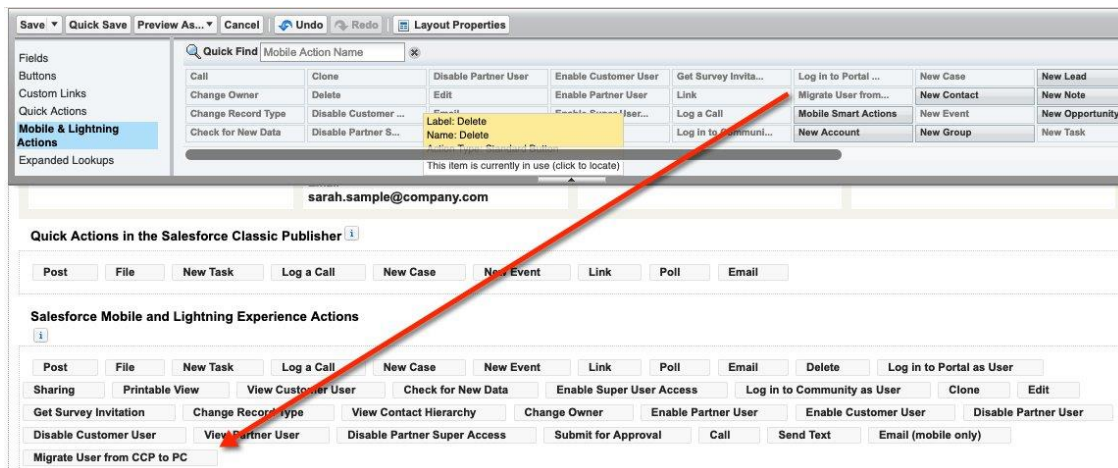


Figure 8

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:

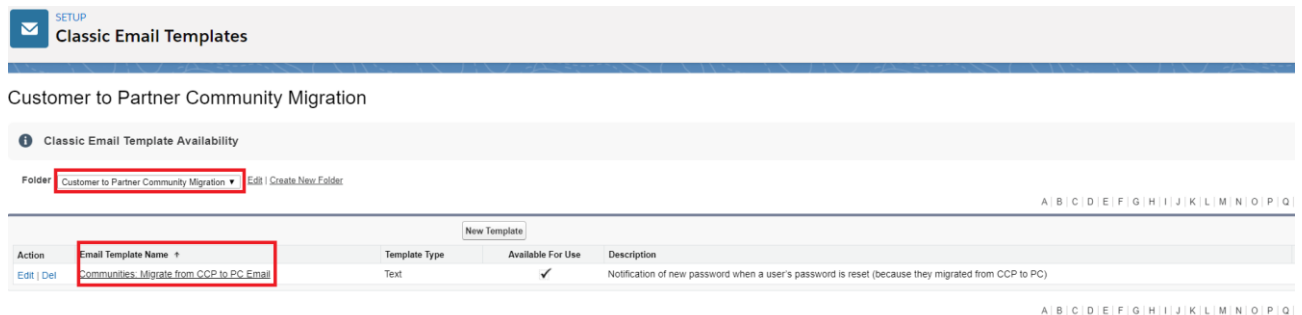


Figure 9

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

Before:

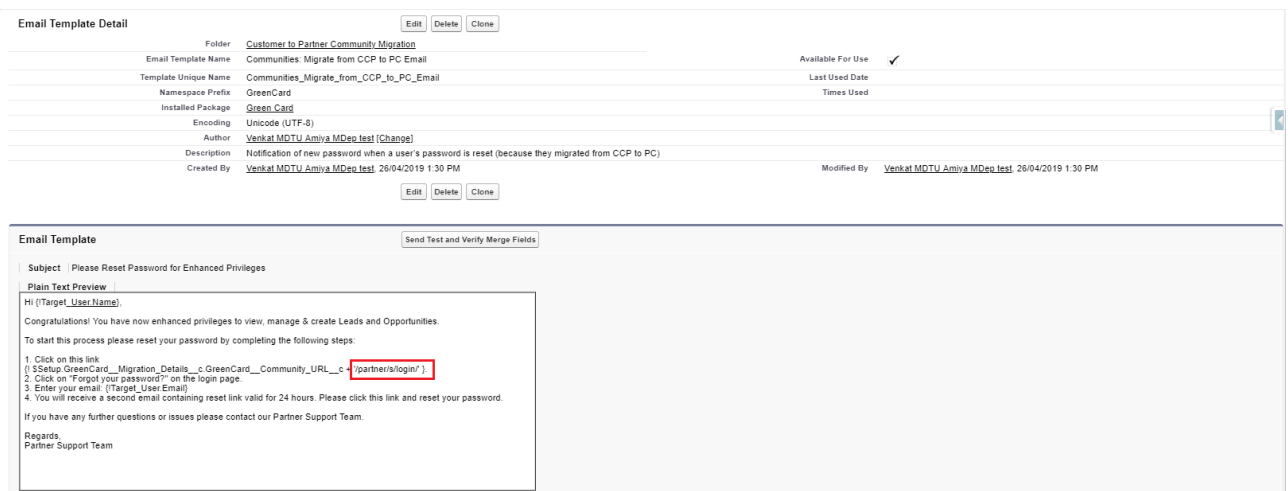


Figure 10

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After:

Text Email Template

Communities: Migrate from CCP to PC Email

Preview your email template below.

Email Template Detail

EditDeleteClone

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.MD@ep-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.MD@ep-test: 26/03/2019 3:00 PM	Modified By	Venkat.MDTU.Amiya.MD@ep-test: 26/03/2019 3:57 PM

EditDeleteClone

Email Template

Send Test and Verify Merge Fields

Subject Please Reset Password for Enhanced Privileges in ICT Program

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 + '/tpc001/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 11

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Scratch Org /DX Installation Steps

Please follow the following steps for installation in a Scratch org. Source format can be found at <https://github.com/SalesforceLabs/GreenCard.git>.

ASSUMPTIONS: you have git, cli installed to run these commands.

1. Create a Scratch Org

Execute these commands in sequence.

- mkdir GCScratchOrgDir
- cd GCScratchOrgDir
- git clone https://github.com/SalesforceLabs/GreenCard.git
- cd GreenCard
- sfdx force:org:create -s -f config/project-scratch-def.json -a GCScratchOrgTest
- sfdx force:source:push -u GCScratchOrgTest
- sfdx force:org:open -u GCScratchOrgTest

2. Create a community

Navigate to All Communities. Click New Community.

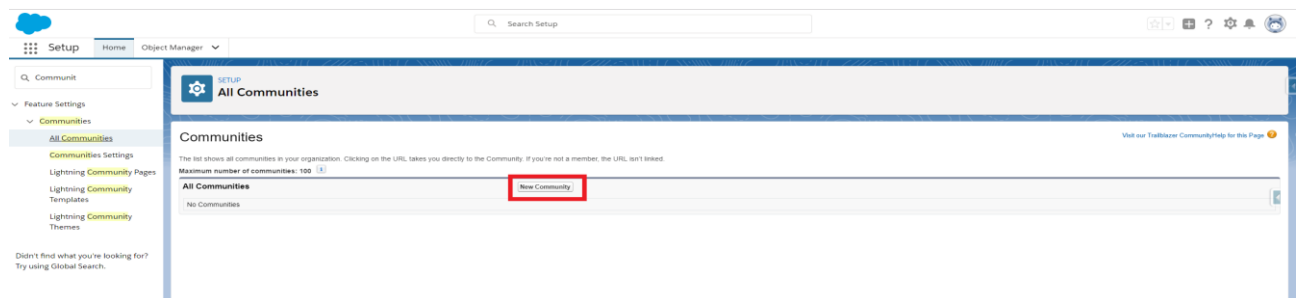


Figure 12

Choose Partner Central

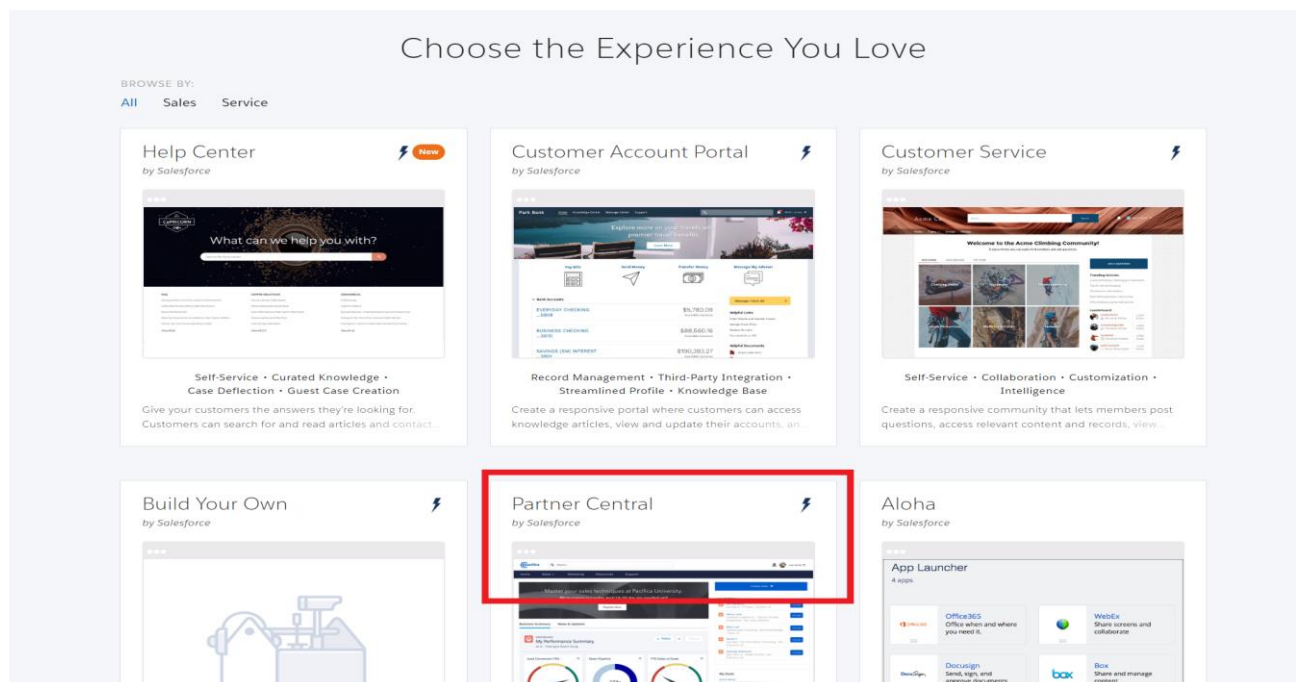


Figure 13

Click Get Started

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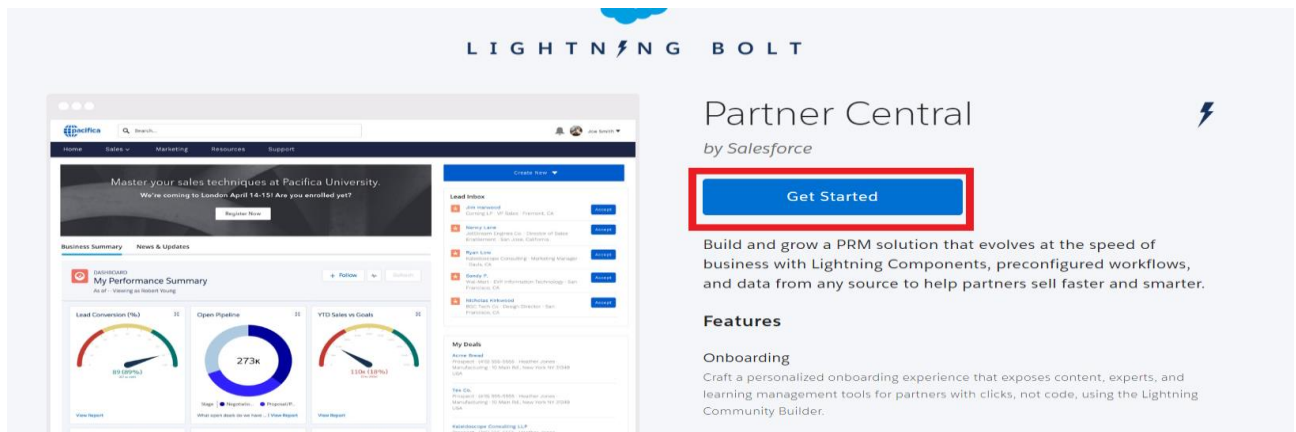


Figure 14

Fill Details as below and click create

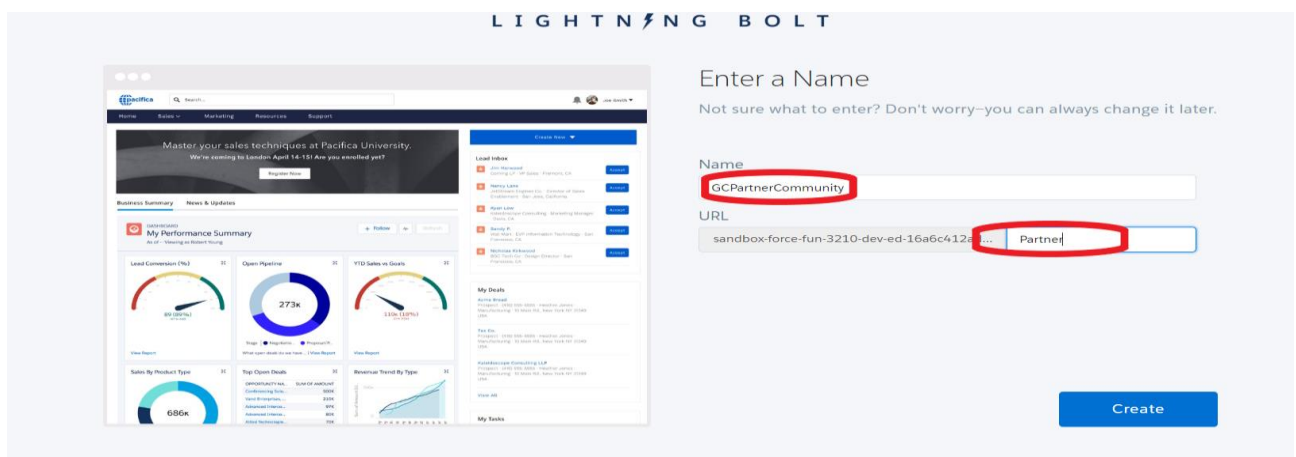


Figure 15

3. Add Profiles(CCP,PC) as members.

Click on Administration

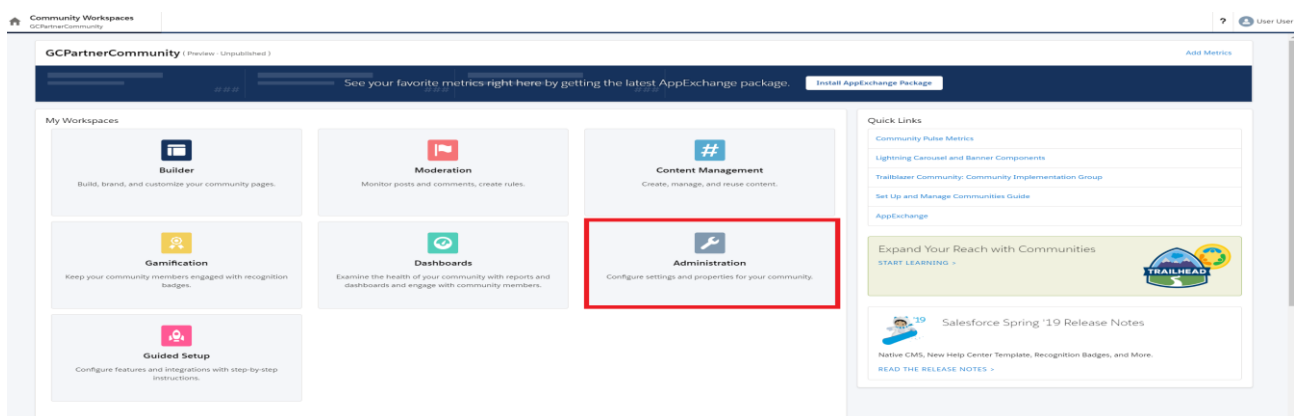


Figure 16

Click on Members. Add CCP Profile as Member.

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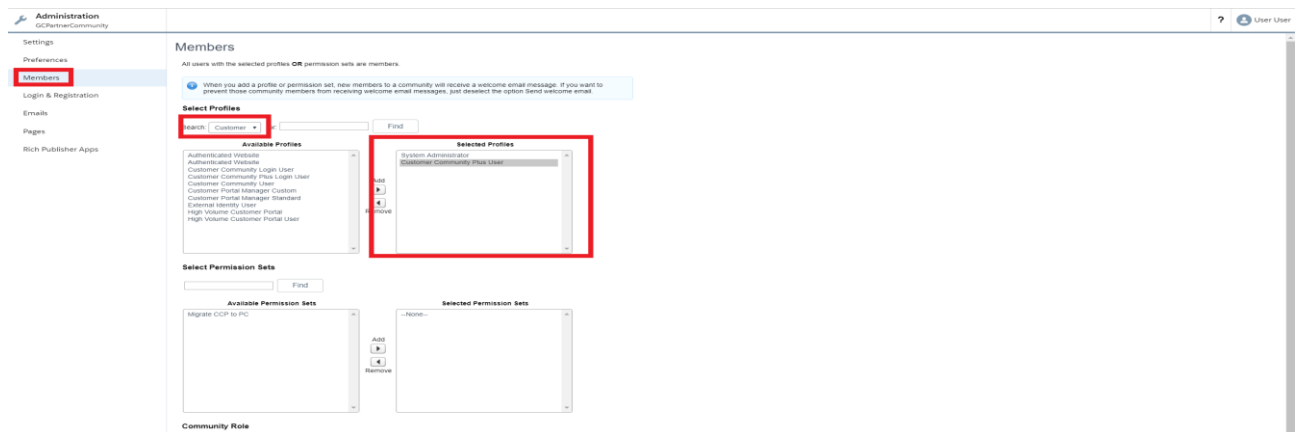


Figure 17

Add PC Profile as Member. Click Save.

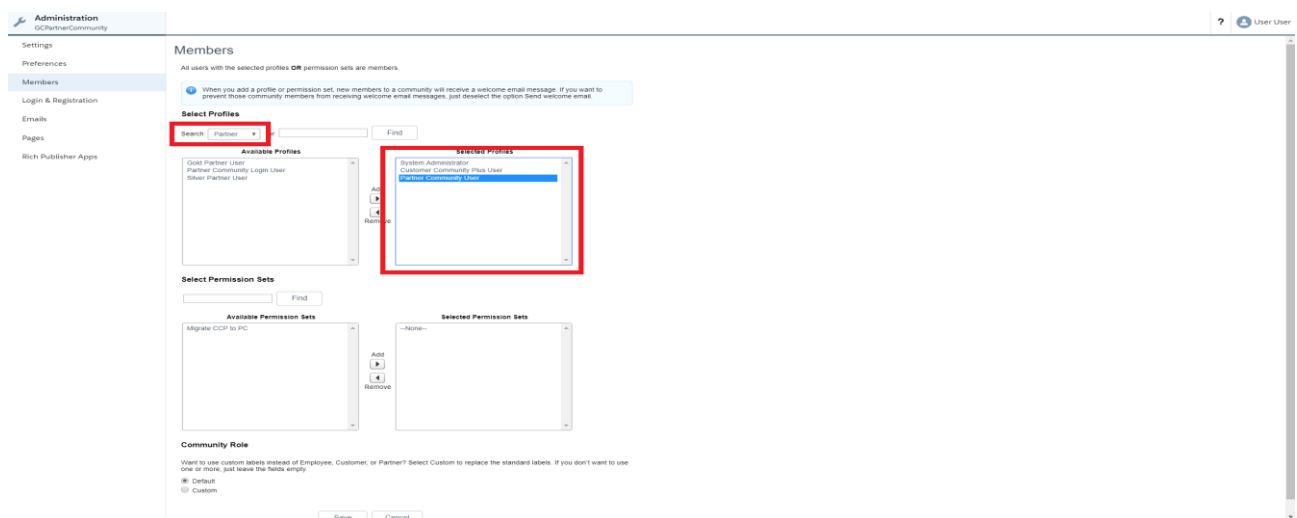


Figure 18

4. Activate Community

Go to Settings. Click on Activate Community

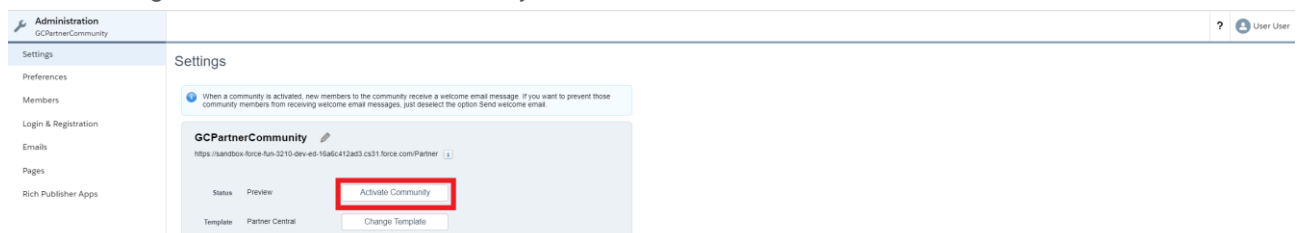


Figure 19

5. Create a Role and assign it to Scratch Org User.

This is necessary as user should have a role to Enable Customer User and currently there is an existing bug which inhibits assignment of an existing role to a user in scratch org.

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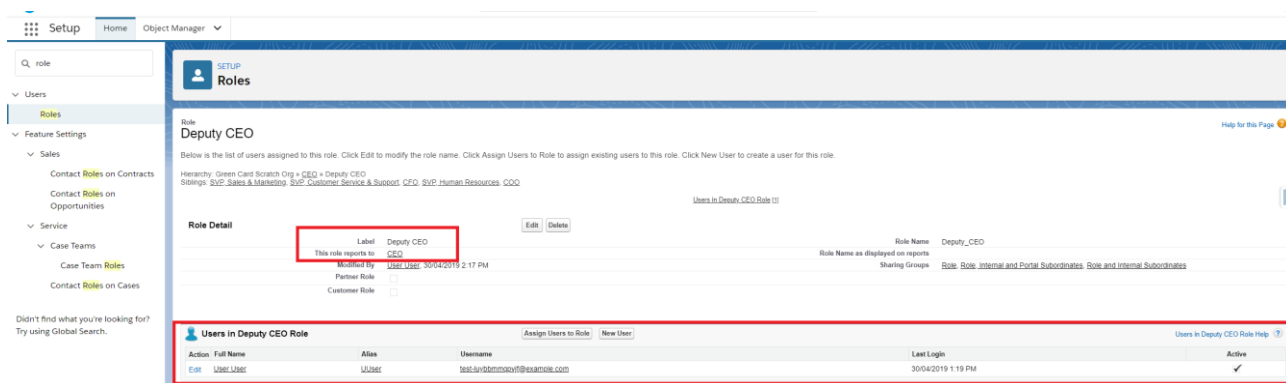


Figure 20

6. Perform Installation Steps for Green Card

a. Update the custom settings “Migration Details”

Please follow [section](#).



Figure 21

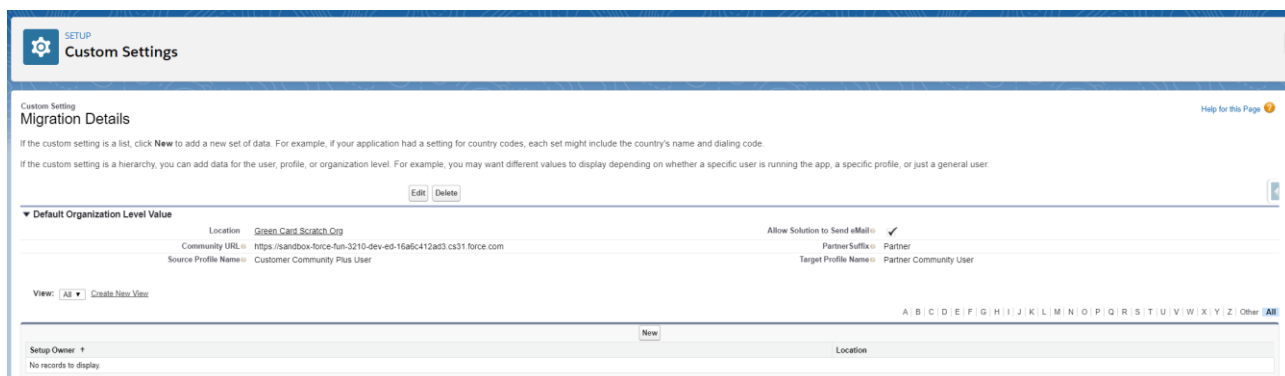


Figure 22

b. Assign a permission set to the running user

Run following command.

```
sfdx force:user:permset:assign -n "Migrate_CCP_to_PC" -u GCScratchOrgTest
```

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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.

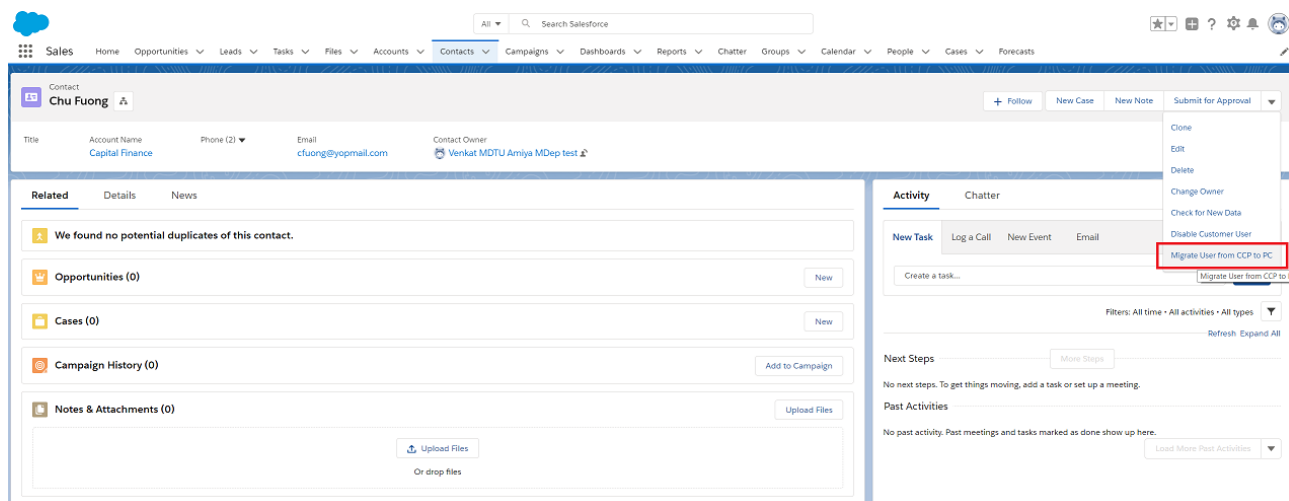


Figure 23

Confirm the user you are going to migrate:

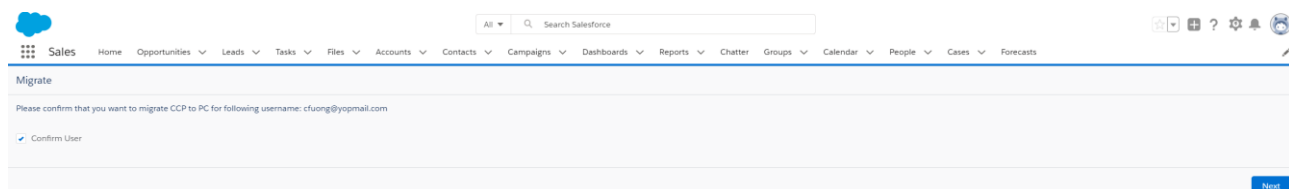


Figure 24

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.

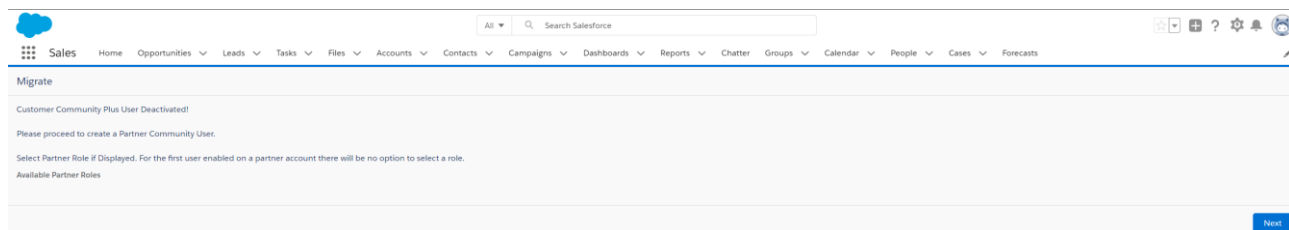
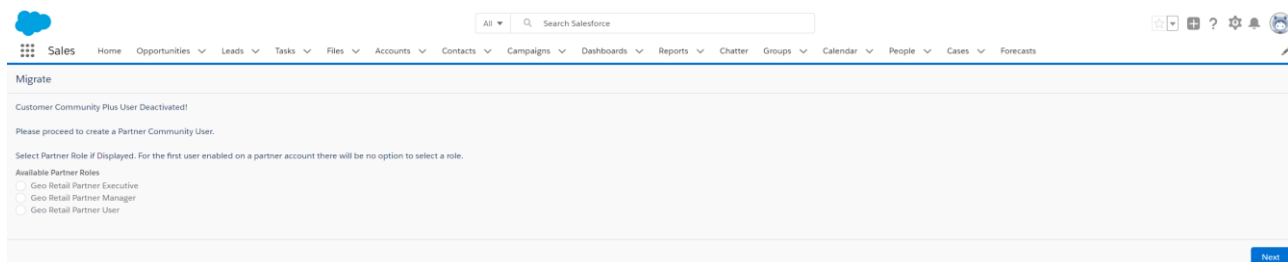


Figure 25

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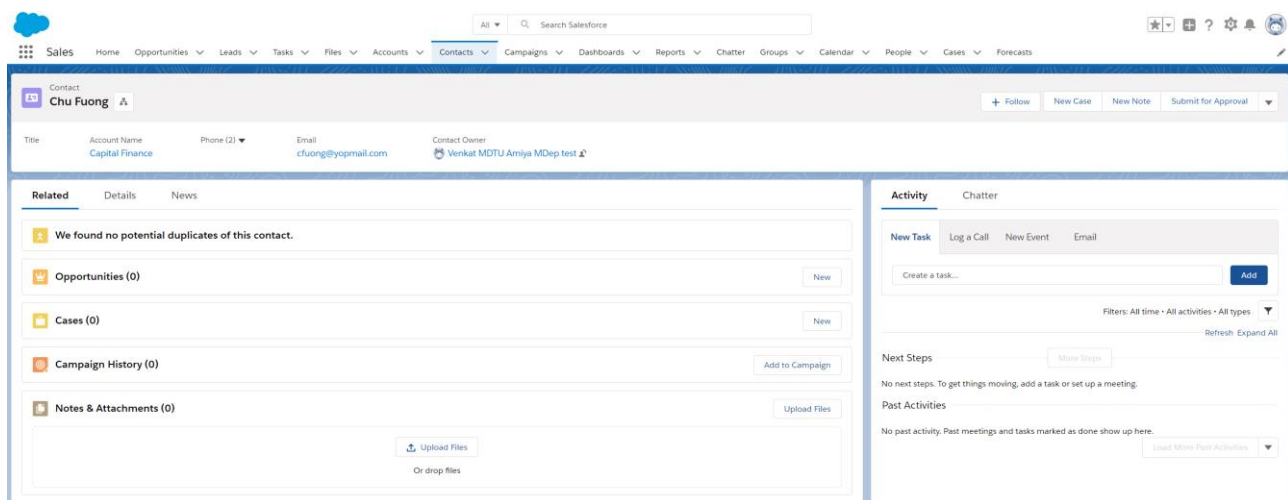
In case no Partner Role is selected, user level Partner Role is assigned to the user.



The screenshot shows the 'Migrate' screen in Salesforce. At the top, there's a navigation bar with 'Sales' and various tabs like Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, People, Cases, and Forecasts. Below the navigation bar, the 'Migrate' section is active. It contains a message: 'Customer Community Plus User Deactivated! Please proceed to create a Partner Community User.' Below this, there's a note: 'Select Partner Role if Displayed. For the first user enabled on a partner account there will be no option to select a role.' Underneath, there's a section titled 'Available Partner Roles' with three radio button options: 'Geo Retail Partner Executive', 'Geo Retail Partner Manager', and 'Geo Retail Partner User'. At the bottom right, there is a 'Next' button.

Figure 26

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.



The screenshot shows the 'Contact' screen in Salesforce for a user named 'Chu Fuong'. The top navigation bar is the same as in Figure 26. Below the navigation bar, the 'Contact' section is active. It shows the contact's name 'Chu Fuong' and a 'Follow' button. Below this, there's a section for 'Related' information, including 'Details' and 'News'. The 'Related' section has four sub-sections: 'We found no potential duplicates of this contact.', 'Opportunities (0)', 'Cases (0)', and 'Campaign History (0)'. Each sub-section has a 'New' button. Below these, there's a section for 'Notes & Attachments (0)' with an 'Upload Files' button. On the right side, there's an 'Activity' section with tabs for 'New Task', 'Log a Call', 'New Event', and 'Email'. Below these tabs, there's a 'Create a task...' input field and an 'Add' button. Below the 'Add' button, there's a filter section with 'Filters: All time • All activities • All types' and a 'Refresh' button. Below the filter section, there's a 'Next Steps' section with a 'Move Steps' button. Below the 'Next Steps' section, there's a 'Past Activities' section with a 'Load More Past Activities' button.

Figure 27

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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 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.

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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.

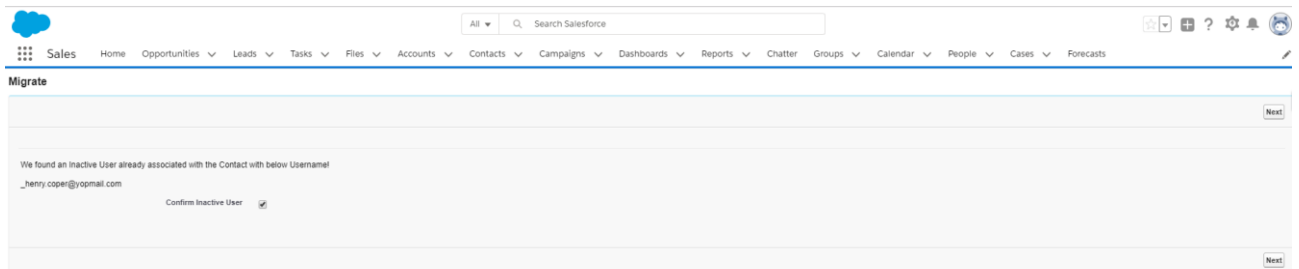


Figure 28

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