



[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

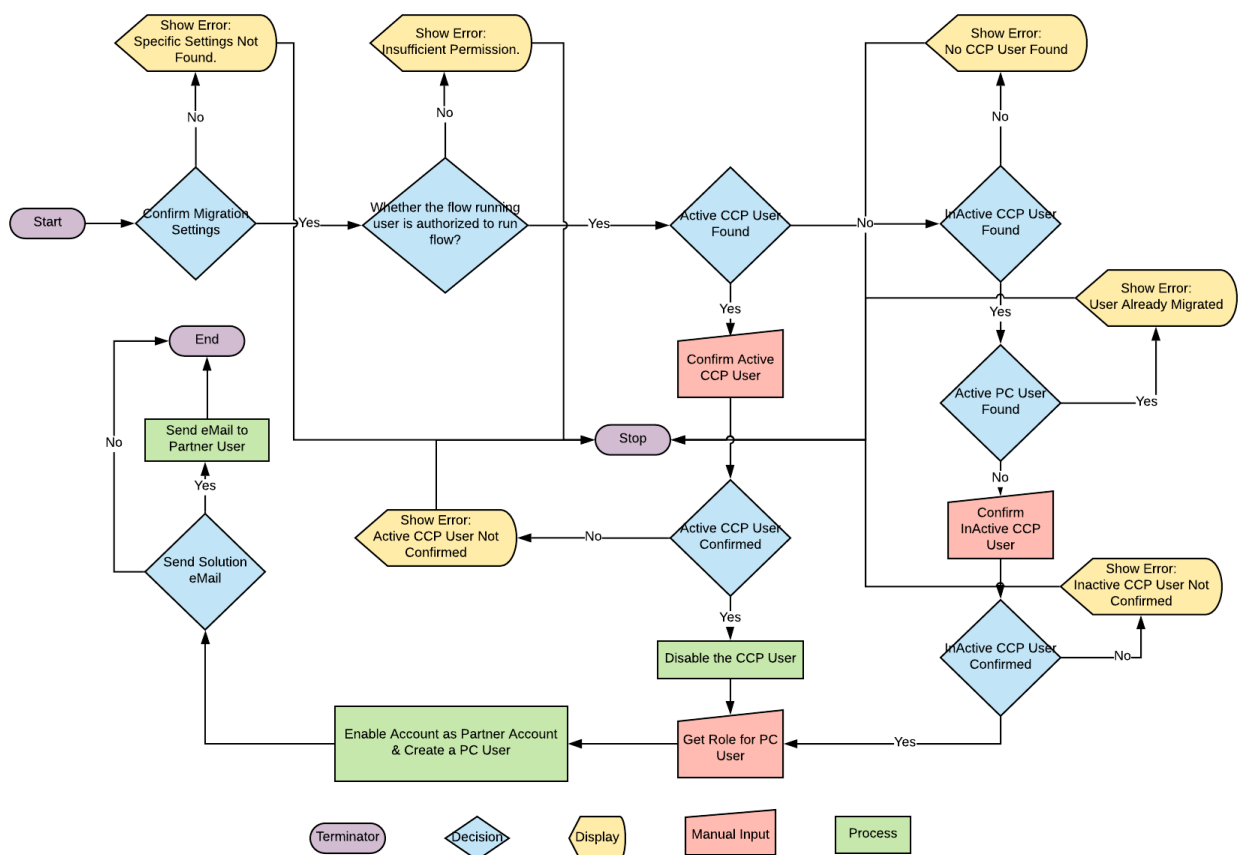


Figure 1

# 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:

Custom Setting  
Migration Details

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing code.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether a specific user is running the app, a specific profile, or just a general user.

**Default Organization Level Value**

View: All [Create New View](#)

**New**

Setup Owner	Location
No records to display	

Figure 2

Custom Setting  
Migration Details

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing code.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether a specific user is running the app, a specific profile, or just a general user.

**Default Organization Level Value**

[Edit](#) [Delete](#)

Location	Community URL	Source Profile Name	Allow Solution to Send eMail	Partner Suffix	Target Profile Name
Salesforce	https://migrodeptest-developer-edition.ap8.force.com	Customer Community Plus User	<input checked="" type="checkbox"/>	Partner	Partner Community User

View: All [Create New View](#)

**New**

Setup Owner	Location
No records to display	

Figure 3

Refer below on how to set up the hierarchy of each combination of custom settings:

Custom Setting  
Migration Details

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing code.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether a specific user is running the app, a specific profile, or just a general user.

**Default Organization Level Value**

[Edit](#) [Delete](#)

Location	Community URL	Source Profile Name	Allow Solution to Send eMail	Partner Suffix	Target Profile Name
Salesforce	https://migrodeptest-developer-edition.ap8.force.com	Customer Community Plus User	<input checked="" type="checkbox"/>	Partner	Partner Community User

View: All [Create New View](#)

**New**

Setup Owner	Location
No records to display	

Figure 4

### 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.

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▼ 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 5

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

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 LeadIQReservedUserPerm 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 6

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

Save Cancel

Available Permission Sets

- CRM User
- Migrate CCP to PC
- Sales Cloud User
- Salesforce Console User
- Service Cloud User
- Standard Einstein Activity Capture

Enabled Permission Sets

- Migrate CCP to PC Plus System Permission

Add Remove

Save Cancel

Figure 7

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

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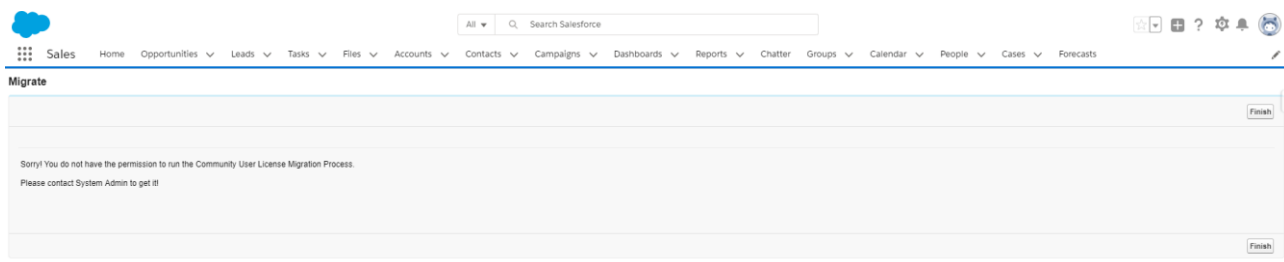


Figure 8

## 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:

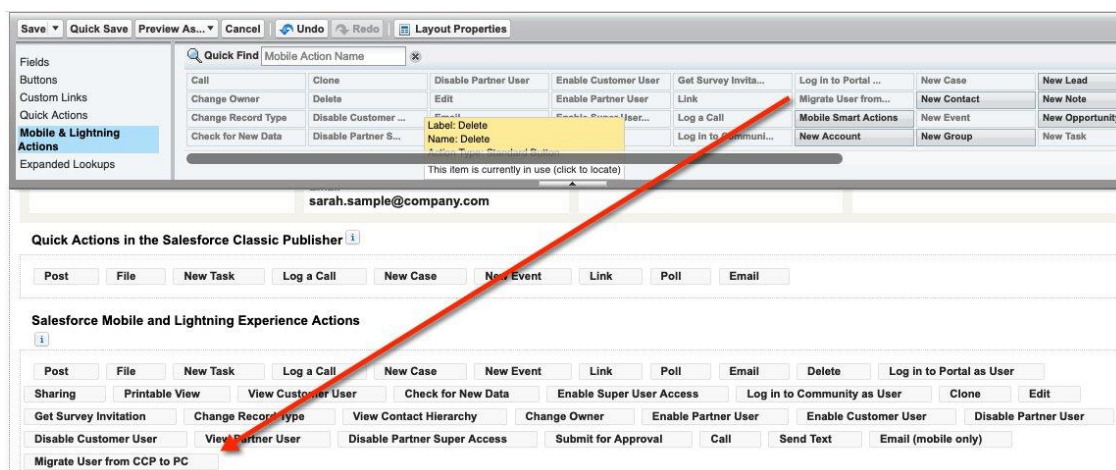


Figure 9

## 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:

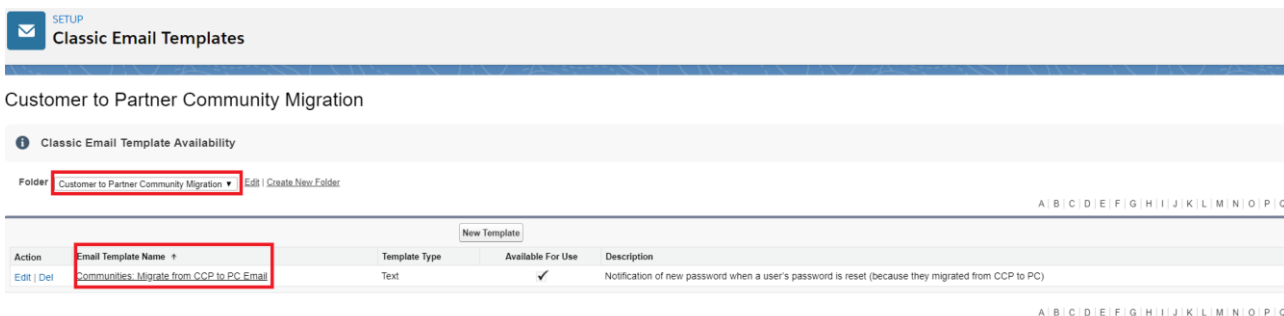


Figure 10

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

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Before:

Email Template Detail		Edit	Delete	Clone
Folder	Customer to Partner Community Migration			
Email Template Name	Communities_Migrate from CCP to PC Email	Available For Use	✓	
Template Unique Name	Communities_Migrate_from_CCP_to_PC_Email	Last Used Date		
Namespace Prefix	GreenCard	Times Used		
Installed Package	Green Card			
Encoding	Unicode (UTF-8)			
Author	Venkat MDTU Amiya MDeo 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 MDeo test 26/04/2019 1:30 PM	Modified By	Venkat MDTU Amiya MDeo test 26/04/2019 1:30 PM	
		Edit	Delete	Clone

Email Template		Send Text and Verify Merge Fields
<b>Subject</b>   Please Reset Password for Enhanced Privileges		
<b>Plain Text Preview</b>		
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.GreenCard__Migration_Details__c.GreenCard__Community_URL__c}} + "/partner/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

After:

Text Email Template

Communities: Migrate from CCP to PC Email

Preview your email template below.

Email Template Detail		Edit	Delete	Clone
Folder	Customer to Partner Community Migration			
Email Template Name	Communities_Migrate from CCP to PC Email	Available For Use	✓	
Template Unique Name	Communities_Migrate_from_CCP_to_PC_Email	Last Used Date		
Encoding	Unicode (UTF-8)	Times Used		
Author	Venkat MDTU Amiya MDeo 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 MDeo test 26/03/2019 3:00 PM	Modified By	Venkat MDTU Amiya MDeo test 26/03/2019 3:57 PM	
		Edit	Delete	Clone

Email Template		Send Text and Verify Merge Fields
<b>Subject</b>   Please Reset Password for Enhanced Privileges in ICT Program		
<b>Plain Text Preview</b>		
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.GreenCard__Migration_Details__c.Community_URL__c}} + "/tc001/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.

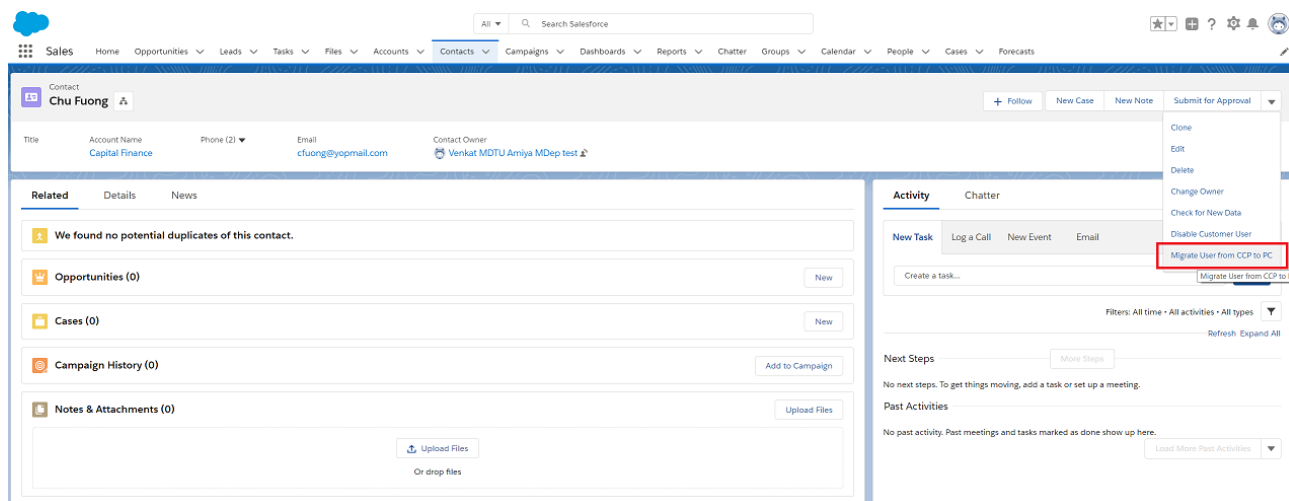


Figure 13

Confirm the user you are going to migrate:

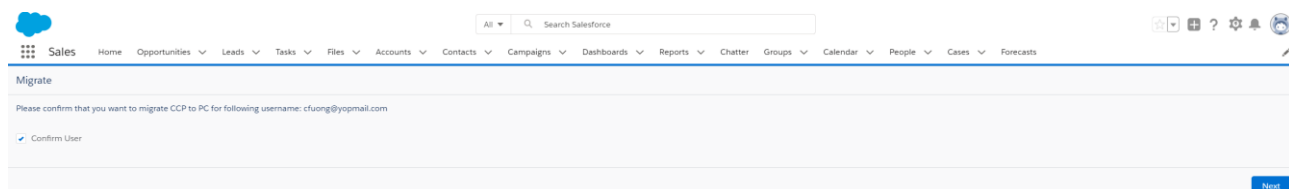


Figure 14

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.

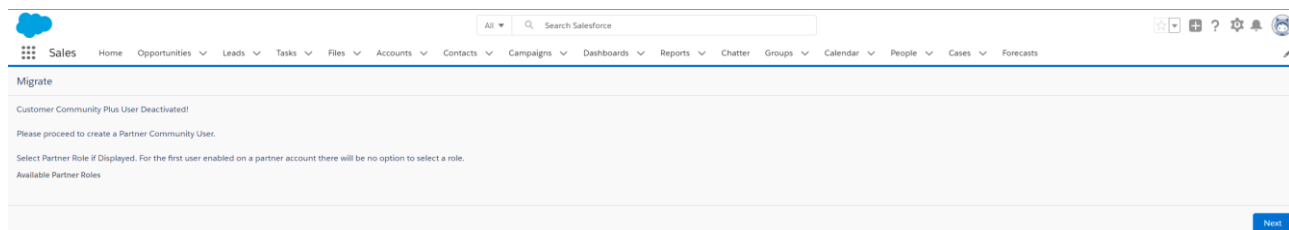
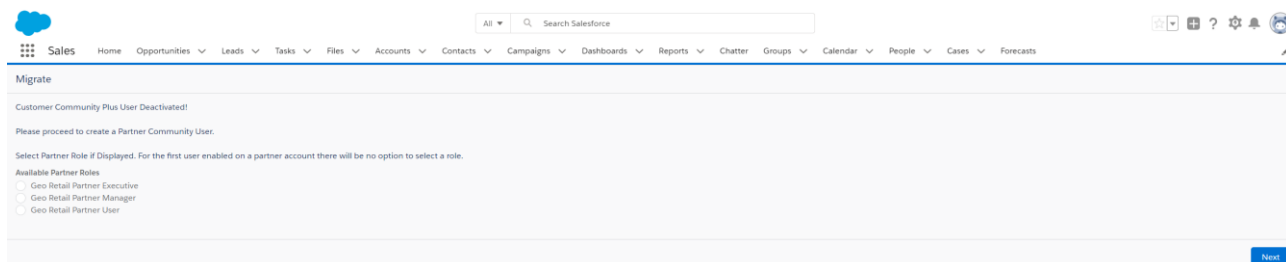


Figure 15



# Green Card – Training Module

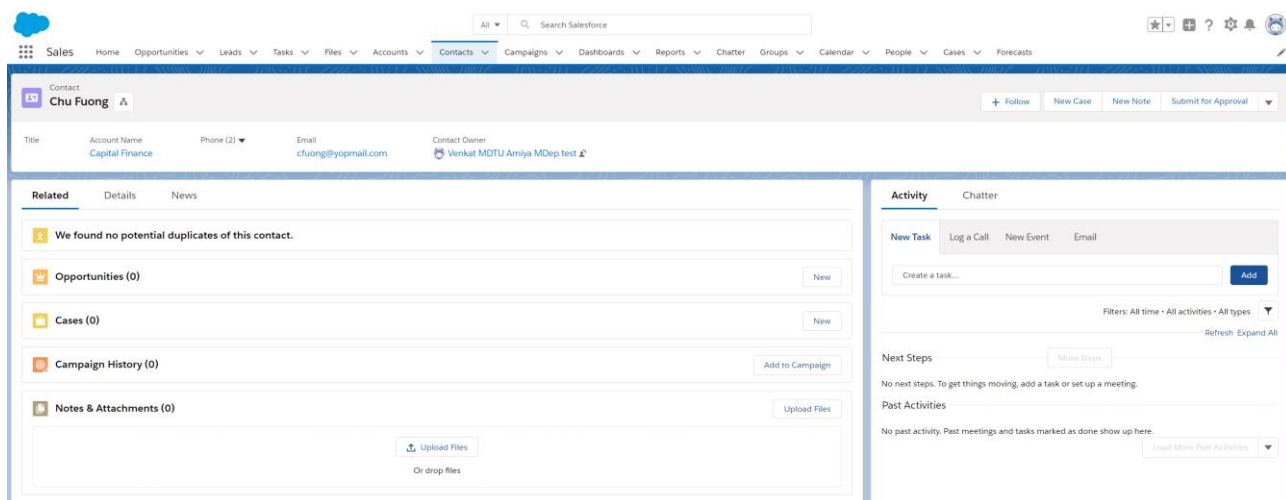
In case no Partner Role is selected, user level Partner Role is assigned to the user.



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 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.



The screenshot shows the 'Contact' screen in Salesforce for a user named 'Chu Fuong'. The top navigation bar is the same as in Figure 16. 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 lists several categories: 'We found no potential duplicates of this contact.', 'Opportunities (0)', 'Cases (0)', 'Campaign History (0)', and 'Notes & Attachments (0)'. Each category has a 'New' button. Below these, there's a section for 'Upload Files' with a 'Drop 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...' 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 17

# Green Card – Training Module

## 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.

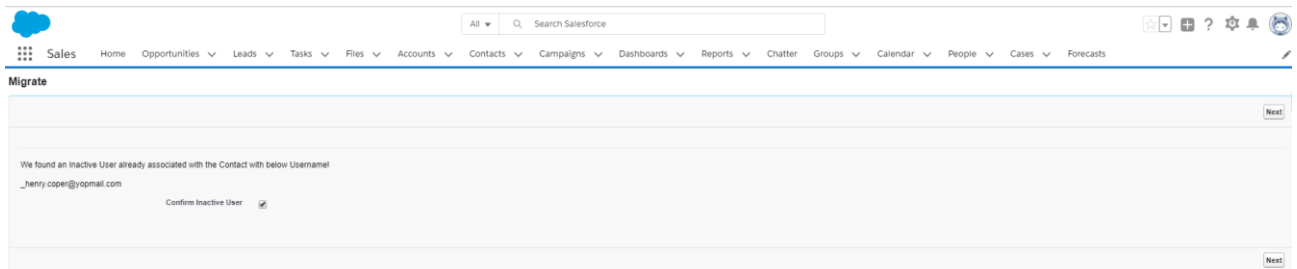


Figure 18

### 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