`confirm_controller_password` Issue (UIUX-1234)

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Overview

This document serves to instruct internal audiences on how to properly troubleshoot and triage for UIUX-1234 issue where {Product2}

Summary

{Product1} and {Product2} are referred to as two separate products.

This document was created in order to educate internal teams about an incident causing the `confirm_controller_password` confirmation email not to be sent for {Product2} Sellers if that email were previously tied to an existing account created using {Product1}.

ⓘ Intended Audience

- All internal teams with access to {ProprietaryProduct1} + {ProprietaryProduct2}
- Implementation
- Onboarding
- API
- Integration Engineers
- Customer Support

⚠ Impacted Individuals

ⓘ Seller accounts need to meet the following criteria to be considered for this SOP flow:

- Seller account created before 1/18/22
- {Product2} seller has a pre-existing {Product1} account with WePay using the same email address as their {Product2} account
- Two (or more) {Product2} Legal Entities are present

What to expect from a partner outreach?

Partners may be unaware that their sellers are experiencing this issue, so the initial issue the partner presents may appear similar to a standard ticket ask.

That being said, below are a few word tracks that Customer Support can expect to receive from a {Product2} partner:

> *"One of our sellers is **unable to receive settlements**."*

-OR-

> *"A seller **did not receive** their **welcome / confirmation email**."*

1. Locate a Seller Account

a. Determine if the {Product2} seller has a pre-existing v2 account with {Company}.

In {ProprietarySystem1}, it can be determined whether a {Product2} seller has any pre-existing {Product1} accounts by noting the following:

{Insert_Screenshot_of_ProprierarySystem1_Here}

Under the **Accounts** section on the **User** page in {ProprietarySystem1}, next to each **Account**, there is a column titled {Product2} Object.

- If a {Product2} Object is present in this column, the seller account is a {Product2} account.
- If a {Product2} Object is ***not*** present in this column, the seller account is likely a {Product1} account.

b. Check the email address used for the {Product2} Account and {Product1} Account are the same.

In the example image above, under **Accounts** there is a column titled **Membership**. Under this column we see the title **Controller**. This means that the email address on this user page is considered to be the **Administrator User** of each **Account** listed.

2. {ProprietarySystem2}

Once it has been determined that the **Controller** has used or is still currently using the email address for both {Product2} and {Product1} accounts, follow the steps listed in the {ProprietarySystem2} SOP to determine whether the seller's {Product2} account meets the following criteria:

- Terms of Service (ToS) has not been accepted
- Email is ***not*** verified (`email_verified: false`)

3. Account State (Enabled/Disabled)

Is the {Product2} seller account in an **Enabled** or **Disabled** state?

> ⓘ Disabled Time for {Product2} / {Product1} accounts cannot be extended via the Extend Disabled Time button in {ProprietarySystem1}.

If the {Product2} seller account is in a **Disabled** state, an Onboarding (OB) JIRA will need to be created before moving on to Step 4 - Reach out to API.

Example: {Insert_JIRA_Widget}

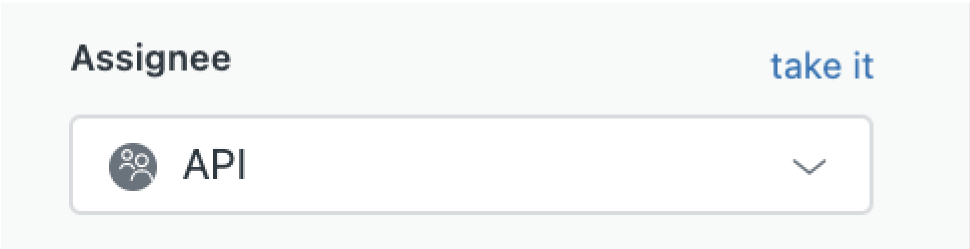
4. Reach out to API

If the seller account meets **all** criteria from Steps 1 and 2 above, and the {Product2} seller account is in an **Enabled** state, the {Product2} partner outreach should be routed to the API Team.

a. Route to API

1. Make sure all tags/form fields are filled out to the left of the Zendesk ticket.

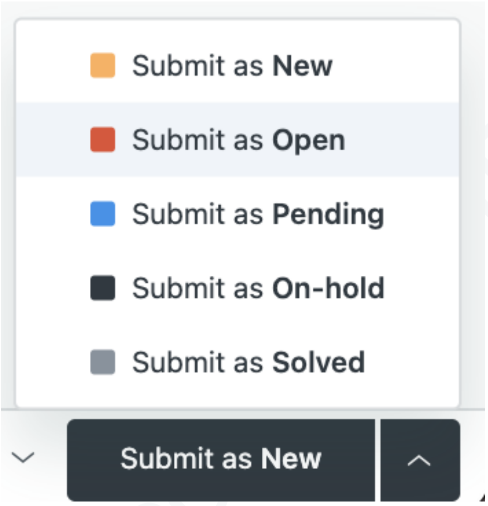
2. Assign to **API** (<u>**DO NOT**</u> take the ticket)



3. With the **Internal Note** tab selected, use the following word tracks for the body of the ticket:

> *@API*
>
> *Hi Team,*
>
> *This {Product2} partner has reached out regarding a seller that was affected by UIUX-1234.*
>
> *To remedy the issue, could we please instruct the partner to perform POST /legal_entities/{id}/confirm_controller_password for the affected seller account?*
>
> *Thanks!*

4. Submit as **Open**



Document Information

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Document Revision History

Date	Version	Description of Revision	Revised By
01/20/22	1.1	Document created	Raquel DeSantis
02/07/22	1.2	Added to Confluence and added detailed steps on how to locate the types of accounts affected in {ProprietarySystem1}.	Raquel DeSantis
02/08/22	1.3	(1) Added step before routing to API which includes creating a OB JIRA for accounts that are in a disabled state; (2) Added word tracks for Customer Support to use in their internal note when transferring the Zendesk ticket to the API team.	Raquel DeSantis