



MIGRATING FROM PORTALS TO COMMUNITIES

Introduction

Organizations with a partner portal or Customer Portal can migrate to Salesforce Communities to take advantage of the great new features it provides. Read on to understand the differences between portals and communities, and get some high level tips and considerations for making a smooth transition to communities.

After setting up a community, you can continue to use your partner portal or Customer Portal. Changes to community settings are completely separate from portal settings and have no impact on your existing portal setup.

Why Migrate?

Communities is our next generation portal that combines the power of the Force.com platform, Site.com branding, and Chatter collaboration. With Communities, you can streamline key business processes and socialize them to the internal and external users you choose. Additionally, you can engage with external users on any record.

Communities contains the functionality available in partner portals and Customer Portals, plus many additional features.

Users in your organization who have portal licenses will be able to access your community, as long as you include those users by adding profiles or permission sets that they're associated with. You don't need to purchase new community licenses for your existing portal users. For more information on licenses, see [User Licenses](#).

What's New?

Communities provide exciting new features that weren't previously available to partner portal or Customer Portal users, such as:

- Templates you can use to quickly and easily build a self-service community that gives customers the same visual and functional experience whether they use a tablet, a mobile device, or their desktop. For more information, see [Community Templates for Self-Service Implementation Guide](#).
- Use of Site.com to create branded public and private pages
Communities users with the "Create and Set Up Communities" permission automatically have full site administrator access to a community's Site.com site. To let Communities users without the permission edit the site, you must purchase and assign either a Site.com Publisher or a Site.com Contributor feature license, and assign a user role at the site level.
- Chatter inside communities for partner and customer users, including:
 - Public and private groups
 - File sharing
 - Topics and recommendations
 - Social profile
 - Chatter REST API
 - Private tasks for partner and customer community users
 - Customizable email settings and templates

- Management of community members using permission sets
- Access to dashboards for partner users in communities
- Ability for partner users to import accounts, contacts, and leads using the Data Import Wizard. Partner users can also mass update leads.
- User sharing to set up a membership model (open or private)
- Single sign-on for internal and external users, and support for multiple identity providers
- Support for login through multiple authorization providers (Salesforce, Facebook®, Janrain®)
- Mobile access using Salesforce1

What's Changed?

Some features behave differently in Communities than they did in partner portals or Customer Portals. These differences are as follows.

Membership, User Management, and Delegated Administration

- Community access can be granted to any type of user, including internal users and portal or community users.
- The membership model supports permission sets or profiles.
- Internal users with the “Manage External Users” permission can manage both partner users and customer users (assuming the user also has Read on Accounts).
- Self-registration is available to both partner users and customer users.

Email, Notifications, and Templates

- The “Reset password” email contains a link to the Community password reset page instead of a temporary password (assuming the user belongs to at least one published community). In communities, member-initiated reset password links expire in 24-hours. Community members also receive emails if an error is encountered when trying to process their password reset request.
- “Case comment notification” is available to both partner users and customer users.
- Email templates are defined within the community. Email templates set at the organization level aren’t used in Communities.
- The `Change owner to portal user template` setting is no longer used. Communities uses the organization default setting.
- Emails created from an email template that use the `{!<any_object>.Link}` or `{!Case.Link}` merge fields include a link to the record in the community.

Custom Objects

The `Available for Customer Portal` checkbox on custom objects is not available after enabling Communities. As a result, administrators can select any custom objects for use in a Customer Portal or community.

Tasks

In Communities, the “Public” checkbox on tasks now applies to users with partner portal licenses. Tasks marked “Public” are visible to users with access to the owning record; tasks not marked “Public” are visible by internal users and the task owner. These changes do not affect existing portals.

Search (with Chatter enabled)

If Chatter is enabled in your organization, there is a global search box at the top of the page instead of the sidebar search that was available in your portal. If Chatter is disabled, a sidebar search box appears.

Login

A portal ID is not required to log in to a community. An external user just needs the URL. For example, if *acme* is your domain name and your community name is *partner*, the login URL for your community would look like this:

`http://acme.force.com/partner/login.`

Visualforce and Apex Pages

If you're using Visualforce pages, the existing hard-coded paths won't work. You must [update the paths with the correct URL](#) for your community.

Apex Triggers

If your organization has Apex triggers on Chatter posts or comments, when you enable Communities the triggers will automatically apply to all communities created within your organization. If you want the triggers to apply to a certain community or your internal organization only, you must [update the trigger with code that returns the community ID](#).

Ideas

- Ideas "Zones" can now be restricted to a community only.
- Global search will only find ideas in that community.
- Ideas will now only show zones within that idea.
- Ideas API still queries all ideas a user has access to, including ideas in zones related to portals.
- Zones can be moved from one community to another.
- Ideas MRU now only shows ideas in zones related to the community.



Note: If a zone is removed from the community, the most recently used items aren't deleted, but you won't be able to access them.

Campaigns

Partner portal users can be assigned read, create, and edit permission on campaigns. This permission allows partner portal users to create and edit campaigns in communities but not in portals.

Changes That Don't Require Communities

The following changes occur even if Communities isn't enabled.

- Changes to labels and field names.

New Value	Old Value	Type
Manage External Users	Manage Partners	User permission
Manage External Account	Work With Portal (on account)	Field label
Manage External User	Work With Portal (on contact)	Field label
Delegated External User Administrator	Delegated Portal User Administrator	User permission
Convert External User Access Wizard	Convert Portal User Access Wizard	Sharing Tool

- Delegated administrators can manage users within the same account, regardless of whether they're partner users or customer users.
- The `Visible in Self-Service` checkbox on activities was renamed to `Public`.

Features Not Available in Communities

- Documents tab
- Old Questions tab
- Custom help settings per community
- The following components aren't available, but can be exposed in your community by adding them to the Home tab and including that tab in your community:
 - Welcome Component
 - Lead Inbox
 - Multilingual HTML
 - Messages on Tabs
 - Approval Inbox
- Self-Registration settings for your portals won't work in Communities. After enabling Communities, you'll need to turn on self registration within each community.
- Top level solution category and Enable self-close from solutions. While you can add the Solutions tab, we don't support the solution hierarchy. We recommend using Salesforce Knowledge instead.

What's Still the Same?

While you will need to create and set up new communities, you can reuse many elements you set up for your portals, such as:

- User licenses—Users in your organization who have portal licenses will be able to access your community, as long as you include those users by adding profiles or permission sets that they're associated with. You don't need to purchase new community licenses for your existing portal users. For more information on licenses, see [User Licenses](#).
- Branding assets
- Reports on records
- Sharing rules
- Workflow
- Knowledge articles still appear for external users as long as they're exposed in your community, either through Chatter Answers or the Knowledge tab.

Note that articles that were available in a Customer Portal become available to users with the Customer Community license and articles that were available in a partner portal become available to users with the Partner Community license.

- If your organization has person accounts, you can't use them as partner accounts and you can't create Partner Community users that are associated with them. Just as with partner portals, only business accounts can be used as partner accounts.

Tips for Migrating

Migrating your partner portal or Customer Portal users to a community requires performing typical community setup as outlined in [Getting Started With Salesforce Communities](#).

These tips will help you migrate some of your existing portal settings into your community.

Migrating Existing Visualforce or Apex Pages

If you have Visualforce or Apex pages that you want to use in your community, make sure the paths are updated with the correct URL for the community. To get the correct community URL in Visualforce pages, use `{!$Site.CurrentSiteUrl}`. To get the correct URL in Apex pages, use `Site.getCurrentSiteUrl()`. Additionally, if you have or are building Visualforce pages and only want to return the community prefix, you can use `{!Site.Prefix}`. To get these values on a Visualforce page with an Apex controller, use `Site.getCurrentSiteUrl()` or `Site.getPrefix()`.

Updating Apex Triggers so That They're Community Aware

If your organization has Apex triggers on Chatter posts or comments, when you enable Communities the triggers will automatically apply to all communities created within your organization. If you want the triggers to apply to a certain community or your internal organization only, you must update the trigger with code that returns the community ID. For example, if you only want the triggers to apply to your internal organization, add the following code before your logic:

```
//for logic applicable only in the internal org
if (Network.getNetworkId() == null) {
```

Allowing Self-Registration in Your Community

Select **Allow external users to self-register** when editing the Login & Registration page options for your community.

For complete instructions, see "Set Up Self-Registration for Your Community" in [Getting Started With Salesforce Communities](#).

Tips for Enabling Chatter Answers or Ideas in Your Community

If you're using Chatter Answers or Ideas:

1. Edit the Zone you want to use in your community.
2. Change the Visibility Setting from "Portal" to "Community".
3. Select the community that the Zone should appear in.
4. Edit your community setup and expose the Q&A and/or Ideas tabs.
5. Ensure that the appropriate profiles have access to the tab.

Directing External Users to Your Community Login Page

Direct external users to your new community login page by either:

- Implementing a simple Javascript redirect on the `onload()` event in the login page header
- Inserting an HTML message in the login page header with a redirect to the new login page

User Licenses

Users in your organization who have portal licenses will be able to access your community, as long as you include those users by adding profiles or permission sets that they're associated with. You do not have to purchase new Communities licenses for these users. The portal licenses roughly correspond to the new Communities licenses as follows:

Portal License	Communities License
High Volume Portal User Authenticated Website	Customer Community
Customer Portal Enterprise Administration Customer Portal Manager Standard Customer Portal Manager Custom	Customer Community Plus
Gold Partner	Partner Community

As mentioned above, you don't need to convert your portal licenses into community licenses, but if desired, you can swap some licenses for Communities licenses by either editing the user record or contact (disabling and re-enabling the external user). The table outlines which licenses you can convert to Communities licenses.

 **Note:** If you decide to convert users to using a Communities license, make sure that the new user records have the same permissions and object access. To retain historical user data associated with the previous license type, you'll need to manually migrate and associate it with the new user records.

Original license	Convert to...		
	Customer Community (Named User or Login Based)	Customer Community Plus (Named User or Login Based)	Partner Community (Named User or Login Based)
Partner			
Gold Partner	Switching from a partner portal license to a Customer	Switching from a partner portal license to a Customer	An administrator can change the license type and profile on the user record.
Silver Partner	Community license would result in a loss in functionality.	Community Plus license would result in a loss of functionality.	
Bronze Partner	An administrator must disable the contact as a Partner User and re-enable as a Customer User.	An administrator must disable the contact as a Partner User and re-enable as a Customer User.	

Original license	Convert to...		
	Customer Community (Named User or Login Based)	Customer Community Plus (Named User or Login Based)	Partner Community (Named User or Login Based)
Customer Portal Manager Custom			
Customer Portal Manager Standard	Switching from a customer portal license to a Customer Community license would result in a loss in functionality.	An administrator can convert a Customer Portal Manager Custom, Customer Portal Manager Standard, Overage Customer Portal Manager Custom, or Overage Customer Portal Manager Standard license (for a named user) to a Customer Community Plus license and vice versa, by changing the license type and profile on user record.	An administrator must disable the contact as a Customer User, ensure the account is enabled as a Partner Account, and then enable the contact as a Partner User.
Overage Customer Portal Manager Custom	An administrator must disable the contact as a Customer User, and then re-enable as a Customer User to create a new user record and associate it with the new license.		
Overage Customer Portal Manager Standard			
High Volume Customer Portal Authenticated Website			
	An administrator can change the license type and profile on the user record.	An administrator must disable the contact as a Customer User, and then re-enable as a Customer User to create a new user record and associate it with the new license.	An administrator must disable the contact as a Customer User, ensure the account is enabled as a Partner Account, and then enable the contact as a Partner User.
Customer Community			
	An administrator can convert a Customer Community license (for a named user) to a Customer Community Login license and vice versa, by changing the license type and profile on user record.	An administrator must disable the contact as a Customer User, and then re-enable as a Customer User to create a new user record and associate it with the new license.	An administrator must disable the contact as a Customer User, ensure the account is enabled as a Partner Account, and then enable the contact as a Partner User.
Customer Community Plus			
	Switching from a Customer Community Plus license to a Customer Community license would result in a loss in functionality. An administrator must disable the contact as a Customer User, and then re-enable as a Customer User to create a new user record and associate it with the new license.	An administrator can convert a Customer Community Plus license (for a named user) to a Customer Community Plus Login license and vice versa, by changing the license type and profile on user record.	An administrator must disable the contact as a Customer User, ensure the account is enabled as a Partner Account, and then enable the contact as a Partner User.

Original license	Convert to...		
	Customer Community (Named User or Login Based)	Customer Community Plus (Named User or Login Based)	Partner Community (Named User or Login Based)
Partner Community	 <p>Switching from a Partner Community license to a Customer Community license would result in a loss of functionality.</p> <p>An administrator must disable the contact as a Partner User and re-enable as a Customer User.</p>	 <p>Switching from a Partner Community license to a Customer Community Plus license would result in a loss of functionality.</p> <p>An administrator must disable the contact as a Partner User and re-enable as a Customer User.</p>	 <p>An administrator can convert a Partner Community license (for a named user) to a Partner Community Login license and vice versa, by changing the license type and profile on the user record.</p>

To disable a contact as a customer user or partner user so that you can assign them a Community license:

1. From the contact’s detail page, click **Manage External User**, then select **Disable Customer User** or **Disable Partner User**. This deactivates the previous user record and disassociates it from the contact.
2. If you’re converting to a Partner Community license, go to the account for the contact, and ensure that it is enabled as a partner account. If it isn’t, click **Manage External Account**, then select **Enable as Partner**.

 **Note:** If your organization has person accounts, they cannot be used as partner accounts. Only business accounts can be used as partner accounts.

3. Go back to the contact’s detail page, click **Manage External User**, then depending on the type of license you’re converting them to, select **Enable Customer User** or **Enable Partner User**.
4. On the User detail page, select the Community license and associated profile. Enter other user information and click **Save**.