MIGRATING FROM PORTALS TO COMMUNITIES

Introduction

Have a partner portal or Customer Portal in your org? You can set up a community as well, to take advantage of the great new features Salesforce Communities 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.

> ⊘ **Important:** After setting up a community, you can continue using your partner portal or Customer Portal, since they live side by side in your org. Changes to community settings are separate from portal settings and have no impact on your existing portal setup.

Why Migrate?

Communities combine the power of the Force.com platform, Lightning components, and Chatter collaboration. Use communities, to connect with customers in a personalized way, to streamline key business processes, and share them with the internal and external users you choose.

Communities contain the functionality available in partner portals and Customer Portals, plus many more features.

Do you have users in your org who are using portal licenses? No need to switch them to community licenses: They can access any new community you set up as long as you include those users by adding profiles or permission sets that they're associated with.

> 💡 **Tip:** No need to purchase new community licenses for your existing portal users. For more information on licenses, see User Licenses.

What's New?

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

- Community Builder-based templates 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*.
- The power of Chatter within 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
- 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©)

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

- You can grant access to any type of user, including internal, 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 Email Templates

- The "Reset password" email contains a link to the Community password reset page instead of a temporary password. 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.
- The `Change owner to portal user template` setting is no longer used. Communities uses the organization default setting.
- Emails created from an email template using 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.

Search

Search behavior in communities differs depending on the type of template you're using and whether Chatter is enabled in your internal Salesforce org. Take a look at the Search Behavior in Communities topic in Salesforce Help for a detailed account of search.

Login

Users can access publicly available community pages without a login. You can also set up self-registration, so that anyone can log in after registering.

Visualforce and Apex Pages

If you're using Visualforce pages, the existing hard-coded paths don't work. Update the paths with the correct URL for your community.

Apex Triggers

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

Ideas

- Out of the box, Ideas are currently available only in communities using the Salesforce Tabs + Visualforce template. Communities built using a template, such as the Customer Service (Napili) template, can expose Ideas using custom-built Lightning components.
- Ideas "Zones" can now be restricted to a community only.
- Global search only finds ideas in that community.
- Ideas 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 you remove a zone from the community, the most recently used items aren't deleted, but you can't 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`.

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Features Not Available in Communities

- Documents tab
- Old Questions tab
- Custom help settings per community
- The following aren't available, but can be exposed in your community by adding them to the Home tab and including that tab in your component:
  - Welcome Component
  - Lead Inbox
  - Multilingual HTML
  - Messages on Tabs
  - Approval Inbox

- Self-Registration settings for your portals don't work in Communities. After enabling Communities, enable 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 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 are 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.

  Note: 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. As with partner portals, only business accounts can be used as partner accounts.

Tips for Migrating

Migrating your partner portal or Customer Portal to a community requires performing typical community setup as outlined in the Salesforce Help.

These tips 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()`.

For Visualforce pages to only return the community prefix, 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 They're Community-Aware

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

1. Open Community Workspaces or Community Management.
2. Click **Administration** > **Login & Registration**.
3. In the Registration section, select **Allow external users to self-register**.

For more information, see the Salesforce Help.

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

Steps to Make a New Community

Building a community is the result of research, mapping of goals, and defining your audience. At the same time, you must have all your ducks in a row so the actual implementation process is seamless. You know your org best, but use this general checklist to help you organize what you need for a community using the Customer Service (Napili) template.

> Note: Lightning communities rely on Lightning technology but don't require Lightning Experience to be enabled in your org. If you do enable Lightning Experience in your org, both portals and communities operate the same as before. Lightning communities support both portal and community licenses.

Before you begin:

Gather your branding assets:

☐ High-resolution image of your company logo

☐ Color scheme (or an image to upload to automatically generate one)

☐ Image to use as a header

☐ Thumbnail images (385x385 pixels), if you're using Featured Topics

In your internal Salesforce org:

☐ Enable Salesforce Communities. Choose a unique URL that works for your business, because you can't change it after it's been set.

☐ Set up email templates for any communication between the community and its members (welcome email, resetting password email, and so on).

☐ #networks_enable_global_header for the system administrator profile and any other profiles that can access your community from the internal org.

☐ Enable any Service Cloud features you plan to use in the community, such as Salesforce Knowledge.

☐ Review profiles and add permission sets as needed.

☐ Set up Web-to-Case.

If you're using Salesforce Knowledge:

☐ Review your data categories.

☐ Enable feed tracking for your Knowledge article types.

As You're Making Your Community:

In your internal Salesforce org:

☐ Add members to your community.

Configure the Guest User Profile (access using Community Management or the Community Builder):

☐ Give read and create permissions for the case object.

☐ If using Salesforce Knowledge, give guests access to your data categories.

In Community Management or Community Workspaces:

☐ Set up navigational topics and subtopics, and associate articles to each topic.

☐ Set up featured topics and associated images

☐ Download the latest Salesforce Communities Management from the AppExchange.

☐ Set up moderation criteria and rules.

☐ Enable and set up reputation.

In Community Builder:

☐ Customize your community to match your company's branding.

☐ Add standard and custom Lightning components to customize their design and content.

After Making Your Community

☐ Set up an internal Chatter group for feedback, and invite people to take a test drive while the community is still in preview mode.

☐ Incorporate their feedback, and then publish your community.

☐ Seed the community with some initial content: welcome posts, groups, and relevant or fun articles.

What Do I Do with My Old Portal?

Now that you have a new community up and running, what happens to your old portal?

- Like we've already mentioned, you don't initially have to do much: Your portal and community can live side by side, so that your portal members can continue using the portal as you refine your new community.
- Start telling your portal members about the fabulous new community that you've set up, and highlight what's so great about it. Be sure to mention that the community gives members a new experience and that it lives at a new URL.
- Monitor member logins through Community Management to see if members are accessing the new community.
- When you've finally decided to pull the plug on your portal, replace the portal's active site home page with a Visualforce page explaining the move to the community and providing a link to the new site.

User Licenses

Users in your organization who have portal licenses are 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	Customer Community
Authenticated Website	
Customer Portal Enterprise Administration	Customer Community Plus
Customer Portal Manager Standard	
Customer Portal Manager Custom	
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 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, 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 Silver Partner Bronze Partner	⊘ Switching from a partner portal license to a Customer Community license would result in a loss in functionality. An administrator must disable the contact as a Partner User and re-enable as a Customer User.	⊘ Switching from a partner portal license to a Customer Community Plus license would result in a loss of functionality. An administrator must disable the contact as a Partner User and re-enable as a Customer User.	✔ An administrator can change the license type and profile on the user record.
Customer Portal Manager Custom Customer Portal Manager Standard Overage Customer Portal Manager Custom Overage Customer Portal Manager Standard	⊘ Switching from a customer portal 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 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.
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	✔ An administrator can convert a Customer Community Plus	⊘ An administrator must disable the contact 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 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.	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.	ensure the account is enabled as a Partner Account, and then enable the contact as a Partner User.
Partner Community	⊘ Switching from a Partner Community license to a Customer Community license would result in a loss of functionality. An administrator must disable the contact as a Partner User and re-enable as a Customer User.	⊘ Switching from a Partner Community license to a Customer Community Plus license would result in a loss of functionality. An administrator must disable the contact as a Partner User and re-enable as a Customer User.	✔ 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.

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**.