

Creating Gold Smith Role

1. From setup ,Go to quick find ? Search for Roles ? click on set up roles.

Setup Roles

Understanding Roles

Set up your Role Hierarchy to control how your organization reports on and accesses data.

Sample Role Hierarchy

View other sample Role Hierarchies: Territory-based Sample

Executive Staff

- CEO, President, CFO, VP, Sales
- View & edit data, roll up forecasts, & generate reports for all users below
- Can't access data of users above or at same level

Western Sales Director

- Director of Sales
- View & edit data, roll up forecasts, & generate reports for users directly below
- Can't access data of users above or at same level

Eastern Sales Director

- Director of Sales
- View & edit data, roll up forecasts, & generate reports for users directly below
- Can't access data of users above or at same level

International Sales Director

- Director of Sales
- View & edit data, roll up forecasts, & generate reports for users directly below
- Can't access data of users above or at same level

Western Sales Rep

- CA Sales Rep
- OR Sales Rep
- View & edit data, roll up forecasts, & generate reports only for own data
- Can't access data of users above or at same level

Eastern Sales Rep

- NY Sales Rep
- IL Sales Rep
- View & edit data, roll up forecasts, & generate reports only for own data
- Can't access data of users above or at same level

International Sales Rep

- Asian Sales Rep
- European Sales Rep
- View & edit data, roll up forecasts, & generate reports only for own data
- Can't access data of users above or at same level

Set Up Roles

Don't show this page again

2. Click on Expand All and click on add role under whom this role works.

Your Organization's Role Hierarchy

Collapse All Expand All

Nick Enterprises

- Add Role
- CEO Edit | Del | Assign
- Add Role
- HK Edit | Del | Assign
- Add Role
- Manager Edit | Del | Assign
- Add Role
- On Site Emp Edit | Del | Assign
- Add Role
- Remote Emp Edit | Del | Assign
- Add Role

3. Give Label as “Gold Smith” and Role name gets auto populated. Check to whom this role (Gold Smith) reports. Then click on Save.

Setup Roles

Role Edit: Gold Smith

Role Edit

Label: Gold Smith

Role Name: Gold_Smith

This role reports to: CEO

Role Name as displayed on reports: Gold Smith

Save Save & New Cancel

Note: Create one more role as Worker which reports to Gold Smith.

Creating the Role Hierarchy

Help for this Page

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

Show in tree view

Collapse All Expand All

