# ADMINISTRATION ESSENTIALS FOR NEW ADMINS (SETTING UP AND MANAGING USERS)

Exercise Guide

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### 3-1: Create the Recruiting User Profile

**Goal:**

The Recruiting team is going to use Salesforce in the recruitment process. Four custom objects–Applicants, Interviewers, Job Applications, and Positions–have been created. The VP of Human Resources is concerned that Recruiters are not able to view any recruiting records and currently have access to things they shouldn't. And they should be able to use Salesforce1 on their company-issued phones.

**Tasks:**

1. Create a new Recruiting User profile by cloning the No Access profile.
2. Edit the new profile to select the settings and permissions shown below, leaving all others unchanged.

| | |
|---|---|
| **Assigned Apps** | Content, Recruiting (Default), Salesforce Chatter |
| **Assigned Connected Apps** | Salesforce1 for Android |

| Objects & Tabs | Tab | Read | Create | Edit | Delete |
|---|---|---|---|---|---|
| Applicants | Default On | ✓ | ✓ | ✓ | |
| Interviewers | Default On | ✓ | ✓ | ✓ | ✓ |
| Job Applications | Default On | ✓ | ✓ | ✓ | |
| Positions | Default On | ✓ | ✓ | ✓ | ✓ |

| | |
|---|---|
| **App Permissions** | None |
| **System Permissions** | Edit Events, Edit Tasks, Mass Edits from Lists, Mass Email, Run Reports, Send Email |

3. Assign Daniel Garcia, Marcela Lopez, and Javier Reyes to the profile.

**Time:**

10 minutes

**Instructions:**

1. Create a new Recruiting User profile by cloning the No Access profile.

A. Click **Setup | Manage Users | Profiles**.
B. Click **New**, and complete the Clone Profile page.

i. Existing Profile: **No Access Profile**
ii. Profile Name: `Recruiting User`

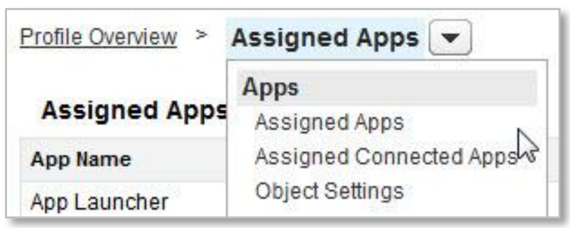
C. Click **Save**.

2. Edit the new profile to select the settings and permissions shown.

A. In the Apps section, click **Assigned Apps**.
B. Click **Edit**, and select the **Default** radio button beside Recruiting.
C. Make sure only the correct apps have the **Visible** checkbox selected.

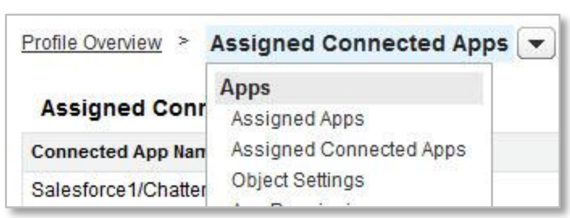
i. Content: **Select**
ii. Recruiting: **Select**
iii. Salesforce Chatter: **Select**

D. For all other apps, make sure the Visible checkbox is cleared.
E. Click **Save**.
F. At the top of the profile, click the **arrow** beside Assigned Apps and select **Assigned Connected Apps**. Click **No Thanks** if prompted to take a tour.



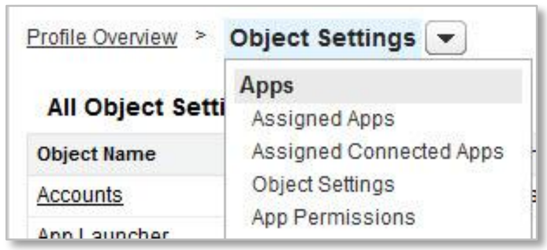

i. Click **Edit**.
ii. From the Installed Connected Apps list, select **Salesforce1 for Android**, and click **Add**.
iii. Click **Save**.

G. At the top of the profile, click the **arrow** beside Assigned Connected Apps and select **Object Settings**.



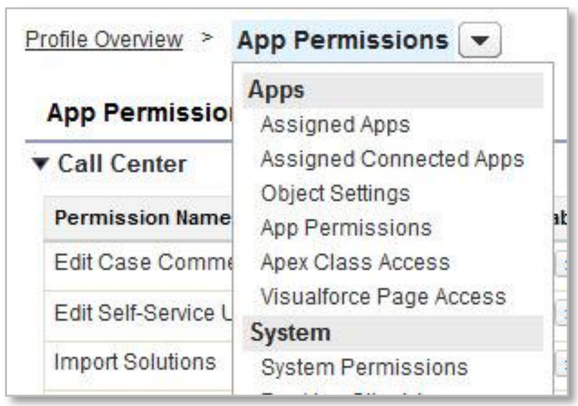

 

H. Set the permissions for Applicants, Interviewers, Job Applications, and Positions objects according to the table above.
I. At the top of the profile, click the **arrow** beside Object Settings, and select **App Permissions**.




i. Click **Edit** and clear all of the checkboxes if any are selected.
ii. Click **Save**.

J. At the top of the profile, click the **arrow** beside App Permissions, and select **System Permissions**.




K. Click **Edit**, and then modify the system permissions so that only those listed below are selected:

**Edit Events**
**Edit Tasks**
**Mass Edits from Lists**
**Mass Email**
**Run Reports**
**Send Email**

Note: The Chatter Internal User is on by default for all users.

L. Click **Save**.

3. Assign Daniel Garcia, Marcela Lopez, and Javier Reyes to the profile.

A. Click **Setup | Manage Users | Users**.
B. In the Action column, click **Edit** in front of Garcia, Daniel.
C. From the Profile picklist, select **Recruiting User**.
D. Click **Save**.
E. Repeat Steps 4, A-D for Marcela Lopez and Javier Reyes.

### 3-2: Set Up an EMEA User

**Goal:**

You have received details from Human Resources for a new hire in the EMEA sales region who will require access to your Salesforce organization.

**Task:**

Create a user record for the new user.

| | |
|---|---|
| Name: | Karl Weber |
| Email: | kweber@aw####.com<br>(Be sure to replace the #### with the unique digits of your practice Salesforce org.) |
| Title: | Sales Rep |
| Department: | EMEA Sales |
| Manager: | Jessica Heinz |
| Location: | Geneva, Switzerland |

**Time:**

5 minutes

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**Instructions:**

1. Create a user record for the new user.
   A. Click **Setup | Manage Users | Users**.
   B. Click **New User**, and then complete the new user record.
      i. First Name: `Karl`
      ii. Last Name: `Weber`
      iii. Email: `kweber@aw####.com`
      iv. Title: `Sales Rep`
      v. Department: `EMEA Sales`
      vi. User License: **Salesforce**
      vii. Profile: **Sales User**
      viii. Set his Locale Settings:
         a. Time Zone: **(GMT +02:00) Central European...(Europe/Amsterdam)**
         b. Locale: **French (Switzerland)**
         c. Language: **French**

d. Currency: **Euro**

ix. Manager: `Jessica Heinz`

C. Click **Save**.

 

**3-3: Set Up an APAC User**

**Goal:**

You have also received details of a new hire in the Tokyo office, who requires access to your Salesforce organization.

Task:

Create a user record for the new user.

| | |
|---|---|
| Name: | Fumiko Suzuki |
| Email: | fsuzuki@aw####.com<br>(Be sure to replace the #### with the unique digits of your practice Salesforce org.) |
| Department: | APAC Sales |
| Title: | Sales Rep |
| Manager: | An Lin |
| Location: | Tokyo, Japan |

**Time:**

5 minutes

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**Instructions:**

1. Create user records for the new user.

   A. Click **Setup | Manage Users | Users**.
   B. Click **New User**, and then complete the new user record.

      i. First Name: `Fumiko`
      ii. Last Name: `Suzuki`
      iii. Email: `fsuzuki@aw####.com`
      (Be sure to replace the `####` with the unique digits of your practice Salesforce org.)
      iv. Title: `Sales Rep`
      v. Department: `APAC Sales`
      vi. User License: **Salesforce**
      vii. Profile: **Sales User**
      viii. Set her Locale Settings:

         a. Time Zone: **(GMT +09:00) Japan Standard Time (Asia/Tokyo)**
         b. Locale: **Japanese**

 

c. Language: **Japanese**
d. Currency: **JPY – Japanese Yen**

ix. Manager: `An Lin`

C. Click **Save**.

 

### 3-4: Create a Chatter Free User

**Goal:**

Desmond Castillo, head legal counsel, requests access to Chatter in order to monitor the types of conversations that are going on. Grant him access to Chatter without incurring any extra costs.

**Tasks:**

1. Create a new user record for Desmond Castillo.
2. Assign the Chatter Free license.
3. Welcome the new user to Chatter by posting on his profile.

**Time:**

5 minutes

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**Instructions:**

1. Create a new user record for Desmond Castillo.
   A. Click **Setup | Manage Users | Users | New User**.
   B. Complete the information for the new user.
      i. First Name: `Desmond`
      ii. Last Name: `Castillo`
      iii. Press **TAB** to move to the next field.
      iv. Alias: (This field auto-populates)
      v. Email: `dcast@aw####.com` (be sure to use the unique number for your training org)
      vi. Press **TAB** to move to the next field.
      vii. Username: (This field auto-populates)
      viii. Community nickname: (This field auto-populates)
      ix. Title: `Head Legal Counsel`
      x. Department: `Legal`
2. Assign the Chatter Free license.
   A. User License: **Chatter Free**
   B. Profile: **Chatter Free User**
   C. Click **Save**.
3. Welcome the new user to Chatter.
   A. Click the **Chatter** tab.
   B. Click **People**.

C. Click **Castillo, Desmond** in the Recently Viewed People list.
D. Make the following Chatter post on Desmond's profile:

```
Desmond, welcome to Chatter! Please upload a photo as soon as you
get a chance, and check out the Recommendations to get started.
```

E. Click **Share**.

### 3-5: Configure Chatter Invites

**Goal:**

Configure Chatter Invites so that only users from AW Computing can receive invitations to join AW's Chatter community.

**Tasks:**

1. Access the org-wide Chatter Settings and enable invites.
2. Whitelist the AW Computing email domain.
3. Post to the All Sales group that Chatter Invites have been enabled.

**Time:**

5 minutes

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**Instructions:**

1. Access the org-wide Chatter Settings and enable invites.
   A. Click **Setup | Customize | Chatter | Settings**.
   B. Click **Edit**.
      i. Allow Coworker Invitations: **Select**
      ii. Allow Customer Invitations: **Select**
2. Whitelist the AW Computing email domain.
   A. In the first Company Email Domains Field, enter `aw####.com` (be sure to use the unique number for your training org.)

      Note: This field would normally be auto-populated with your own company's email domain.
   B. Click **Save**.
3. Post to the All Sales group that Chatter Invites have been enabled.
   A. Click the **Chatter** tab and click **Groups** on the left.
   B. Click **All Sales**.
   C. Enter the following Chatter post:

      ```
      Chatter Invites have been enabled! Feel free to invite others to
      join us in Chatter. Just click the Invite People link in the
      members' area (lower right).
      ```
   D. Click **Share**.

### 3-6: Troubleshoot and Fix Login Issues

**Goal:**

Fumiko Suzuki is having trouble logging in. Find out what the issue is and resolve it.

**Tasks:**

1. Set the password policy to three maximum invalid login attempts.
2. Attempt to log in as Fumiko with an incorrect password.
3. View the login in Fumiko's login history.
4. Attempt to log in as Fumiko three more times with an incorrect password.
5. View the logins in Fumiko's login history and unlock her.

**Time:**

10 minutes

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**Instructions:**

1. Set the password policy to three maximum invalid login attempts.
   A. Click **Setup | Security Controls | Password Policies**.
   B. Review the password policies.
      i. Maximum invalid login attempts: **3**
      ii. Lockout effective period: **15 minutes**
   C. Click **Save**.
2. Attempt to log in as Fumiko with an incorrect password.
   A. Open a new tab in your browser and enter `login.salesforce.com` in the address bar.
   B. Press **ENTER**.
   C. Try to log in as Fumiko.
      i. User Name: `fsuzuki@aw####.com`
      ii. Password: `password`
   D. Click **Login**. You will see an error message.
3. View the login in Fumiko's login history.
   A. Go back to your previous browser tab, where you are logged in to Salesforce.
   B. Click **Setup | Manage Users | Users**.
   C. In the Full Name column, click **Suzuki, Fumiko**.
   D. Hover over the **Login History** related list link at the top of the record. You will see the failed login attempt.

 

4. Attempt to log in as Fumiko three more times with an incorrect password.
   A. Go back to the browser tab with the login page.
   B. Try to log in as Fumiko.
      i. User Name: `fsuzuki@aw####.com`
      ii. Password: `password`
   C. Click **Login**. You will see an error message.
   D. Repeat Step B two more times. The password policy you set allows three failed attempts at logging in. On the fourth failed attempt, it locks the account.
5. View the logins in Fumiko's login history and unlock her.
   A. Go back to your previous browser tab, where you are logged in to Salesforce.
   B. Click **Setup | Manage Users | Users**.
   C. In the Full Name column, click **Suzuki, Fumiko**.
   D. Hover over the **Login History** related list link at the top of the record. You will see the failed login attempts, and the last attempt's Status will be Password Lockout.
   E. Click **Unlock** on the User record.

 