Milestone 8 : Role

A role in Salesforce defines a user's visibility access at the record level. Roles may be used to specify the types of access that people in your Salesforce organization can have to data. Simply put, it describes what a user could see within the Salesforce organization.

Use Case:

You have successfully fulfilled the 1st requirement i.e., differentiating the users based on the functionality. Now comes the 2nd task of differentiating the users based on their position, using your excellent admin skills and expanding the custom roles for the organization and assigning it to the users.

Activity 1: Creating Admin Manager Role

1. Go to quick find --> Search for Roles --> click on set up roles.

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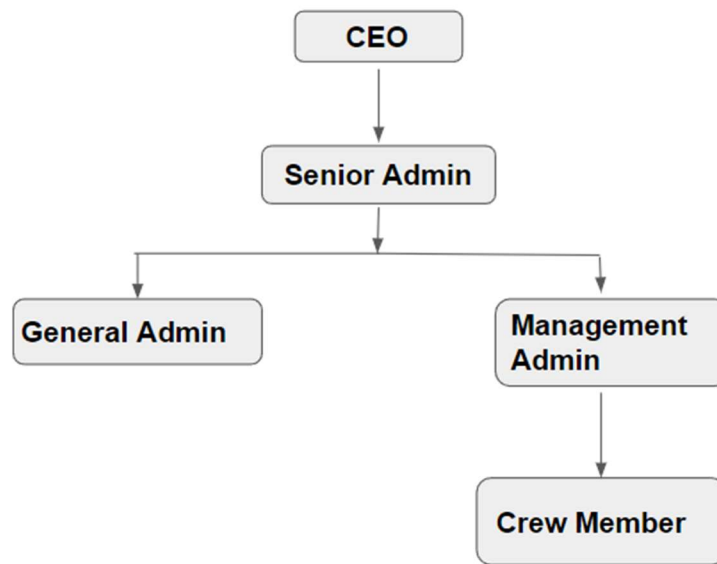   - Add Role

3.   Give Label as "Senior Admin" and Role name gets auto populated. Check to whom this role (Senior Admin) reports. Then click on Save.

Role Edit
New Role

Role Edit

Label	
Role Name	
This role reports to	CEO
Role Name as displayed on reports	

Save   Save & New   Cancel

4.   Refer the below diagram to understand which role reports to which role.

Role Hierarchy: The above diagram represents which role reports to which one.

Activity 2:

Create three more roles for General Admin, Management Admin and Crew Member.

Note: Crew Members report to Management Admin, Management Admin & General Admin Reports to Senior Admin and only Senior Admin reports to CEO.