

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.

The screenshot shows the Salesforce Setup interface. In the left sidebar, the 'Roles' link is highlighted. The main content area is titled 'Understanding Roles' and contains a 'Sample Role Hierarchy' diagram. The diagram illustrates a hierarchy starting with 'Executive Staff' (CEO, President, CFO, VP, Sales) at the top. Below this, there are three main branches: 'Western Sales', 'Eastern Sales', and 'International Sales'. Each branch has a 'Director' role, which then branches into specific sales representative roles (e.g., CA Sales Rep, NY Sales Rep, Asian Sales Rep). A 'Set Up Roles' button is visible at the bottom right of the diagram area.

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

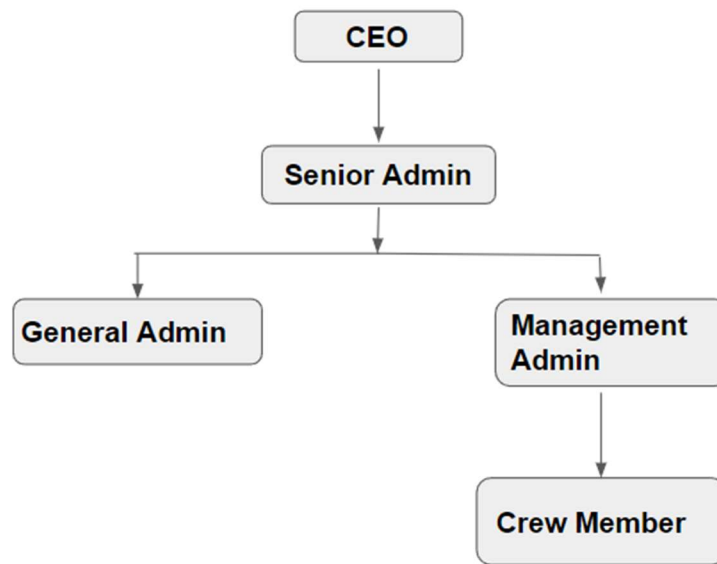
3. Give Label as "Senior Admin" and Role name gets auto populated. Check to whom this role (Senior Admin) reports. Then click on Save.

Role Edit

New Role

Role Edit	
Label	<input type="text"/>
Role Name	<input type="text"/>
This role reports to	<input type="text" value="CEO"/>
Role Name as displayed on reports	<input type="text"/>
<input type="button" value="Save"/> <input type="button" value="Save & New"/> <input type="button" value="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.