

Milestone 9 : Users

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access. Each user account contains at least the following:

- Username
- Email Address
- User's First Name (optional)
- User's Last Name
- Alias
- Nickname
- License
- Profile
- Role (optional)

Use Case:

TheSmartBridge is all set to move with the Salesforce platform. As this platform is very new to the employees in the organization it's up to you to enlighten every employee in it.

Activity 1: Create User

1. Go to setup --> type users in quick find box --> select users --> click New user.
2. Fill in the fields
 1. First Name : Niklaus
 2. Last Name : Mikaelson
 3. Alias : Give a Alias Name
 4. Email id : Give your Personal Email id

5. Username : Username should be in this form: text@text.text
6. Nick Name : Give a Nickname
7. Role : Senior Admin
8. User licence : Salesforce
9. Profiles : Senior Admin

The screenshot shows the 'User Edit' page for 'Niklaus Mikaelson' in the Salesforce Setup interface. The page is divided into two main sections: 'General Information' on the left and 'Permissions' on the right. The 'General Information' section contains fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. The 'Permissions' section contains fields for Role, User License, Profile, Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Data.com User Type, Data.com Monthly Addition Limit, and Accessibility Mode (Classic Only). Red boxes highlight the 'First Name', 'Last Name', 'Email', 'Username', 'Nickname', 'Role', 'User License', and 'Profile' fields. The 'Save' button is also highlighted.

3. Save.

Activity 2

1. Go to setup --> type users in quick find box --> select users --> click New user.
2. Fill in the fields
 - First Name : Kol
 - Last Name : Mikaelson
 - Alias : Give a Alias Name
 - Email id : Give your Personal Email id
 - Username : Username should be in this form: text@text.text

- Nick Name : Give a Nickname
- Role : General Admin
- User license : Standard Platform
- Profiles : General Admin

3. Save.

Activity 3

Create two more users for Management Admin and Crew Members as mentioned in activity 2.