

## **User:**

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.



NOTE- As Salesforce license can only be used by 2 Users at a time in Dev Org, so If you don't find Salesforce license then deactivate a user who has Salesforce license or change the license type from Salesforce to any other

### **1)Creation Of User:**

Navigate to setup

1. In Quick Find box select and search: User
2. Click: New user
3. Give First and Last Name
4. Enter your email in the email field
5. Enter user name, it must be unique
6. User license: salesforce platform
7. In the profile field: Standard user profile
8. Check, Generate new password and notify user immediately

Save

Quick Find / Search...   Expand All | Collapse All

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**User Edit**  
**User A** Help for this Page

**User Edit** Save Save & New Cancel

**General Information** ! = Required Information

First Name  Role   
Last Name  User License   
Alias  Profile   
Email  Active ☒  
Username  Marketing User ☐  
Nickname  Offline User ☐  
Title  Knowledge User ☐  
Company  Flow User ☐  
Department  Service Cloud User ☐  
Division  Site.com Contributor User ☐  
Site.com Publisher User ☐  
WDC User ☐  
Data.com User Type   
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Accessibility Mode (Classic Only) ☐  
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Debug Mode ☐  
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**Single Sign On Information**  
Federation ID

**Locale Settings**  
Time Zone   
Locale   
Language

**Approver Settings**  
Delegated Approver   
Manager   
Receive Approval Request Emails   
☒ Generate new password and notify user immediately  
Save Save & New Cancel

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## OWD: Organization Wide Defaults Settings:

OWD settings determine the baseline level of access for all records of an object. This can be used to give permission to the organization wide and it can be used for restrict the access; we can control the record level access.

OWD can never grant users more access than they have through their object permission.

Primarily four types of access can be set in Salesforce OWD- 1. Public read/write/transfer (Only available for Leads and Cases)

2. Public read/write

3. Public read only

4. Private

## Steps of OWD settings:

Navigate setup in Quick Find search bar

1. Type Sharing Setting and Select it.
2. Edit: Organization Wide Defaults.
3. Scroll down list and select Passport...

Object	Current OWD	Public Read/Write	Public Read/Write	Public Read/Write
Case Escalations	Private	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Entitlement Processes	Public Read/Write	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
API Usage Notifications	Public Read/Write	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mass Emails	Private	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Email Snapshots	Public Read/Write	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Jobs	Private	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Logs	Public Read/Write	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Service Contract	Private	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Service Resource	Public Read/Write	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Service Territory	Public Read/Write	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shift	Private	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Streaming Channel	Public Read/Write	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Waitlist	Private	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Web Cart Document	Private	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Order	Private	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Plan	Private	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Plan Template	Private	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Step Template	Private	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Type	Private	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Type Group	Public Read/Write	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Book	Public Read/Write	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Child object	Public Read/Write	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
college	Public Read/Write	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Passport	Public Read/Write	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Payment	Public Read/Write	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Research Proposal	Public Read/Write	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	Public Read/Write	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Other Settings**

Standard Report Visibility ☒ [i](#) Manual User Record Sharing ☐ [i](#) Manager Groups ☐ [i](#) Secure guest user ☐ [i](#) Require permission to view record access ☐ [i](#) record names in lookup fields ☐ [i](#)

[Save](#) [Cancel](#)