

## Session 5

### Creating Users and Role Hierarchies

#### Licenses Overview:

License Describes a set of features to be get accessible by the user.

Each User should have a Separate License, So that they can login into the organization and can access the applications, features, records.

Types of Licenses:

#### 1. Salesforce License / Full License / Standard License:

It is designed for users who require full access to standard CRM & AppExchange apps. It has Both Standard Functionalities and Custom Functionalities

#### 2. Salesforce Platform License:

who need to access to custom apps but not to standard CRM Functionality.

Users can access custom apps developed in your organization or installed from AppExchange.

It is Purely Concentrating on "Custom Functionalities".

(Ex: Custom Applications, Objects, Fields, Features. Along with few Standard objects of Salesforce like "Account, Contact, Document, Task and Event)

#### 3. Chatter Free License:

users who dont have salesforce license but must have access to chatter.

#### 4. Customer Community License:

Granting the Access on Community Portals.

#### 5. Identity:

Provides extra licenses for employees to access only identity services, such as single sign on.

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#### Licenses Info:

Setup --> Quick Findbox -->company information-->user licenses

## How to Create New user in Salesforce?

Salesforce administrator can perform many user management functions like creating and managing users in salesforce, assigning user licenses, changing passwords, granting permissions to access certain data in salesforce.

### Who is a User?

User is a person who have credentials to log in to Salesforce and use the application. By default every user in salesforce will have a user account. The User account identifies the user and the settings determines it's features.

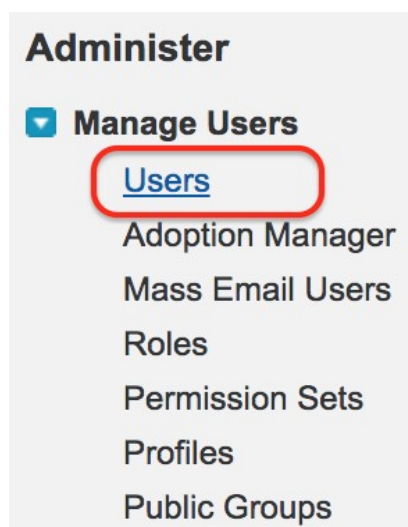
Every user account in salesforce will have username.  
Email address.

Every user account must have a licence. User licenses depends upon the Salesforce license we use.

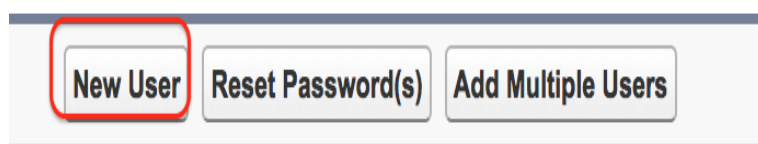
Depending upon the number of user, the organization must purchase that number of licenses and assign to every user.

How to create new user in Salesforce?

Navigate to Setup --> Administer --> Manage Users --> Users.



Click on Users button as shown above.



- Click on New User or Add multiple users.

- We can add up to 10 users at a time in Salesforce.

Now a new page will be opened where we have to enter all details.

The screenshot shows the 'New User' setup page in Salesforce. The page is divided into several sections: General Information, Mailing Address, Single Sign-On Information, Locale Settings, and Approver Settings. Red boxes highlight specific fields: the General Information section (First Name, Last Name, Alias, Email, Username, Title, Company, Department, Division), the Role, User License, and Profile dropdowns, the Time Zone, Locale, and Language dropdowns, and the Save, Save & New, and Cancel buttons at the bottom.

When creating a new user in Salesforce it is important to assign Roles, User license and Profile to the new user.

**Note :-** Username in Salesforce must be in Email address format and unique.

- Enter First name, last name, Alias, Email address.
- Now Assign a Role to the user.
- Now assign user license to the new user.
- Assign a profile to the user.
- Now select generate passwords and notify user via email.
- Click on **Save button**.
- A verification email will be sent to the Email.

## Define a Role hierarchies in Salesforce.

Role hierarchies in Salesforce are sharing settings at application level. Role hierarchies and Sharing Settings in Salesforce determines the level of visibility that users and its subordinates to access object records.

A role hierarchy works together with sharing settings to determine the levels of access users have to your Salesforce data. Users can access the data of all the users directly below them in the hierarchy.

Users who need to see a lot of data (such as the CEO, executives, or other management) often appear near the top of the hierarchy. But role hierarchies don't have to match your org chart. Each role in the hierarchy just represents a level of data access that a user or group of users needs.

A manager always has access to the same data as his or her employees, regardless of the org-wide default settings.

Users who tend to need access to the same types of records can be grouped together.

Depending on your sharing settings, roles can control the level of visibility that users have into your Salesforce data. Users at any given role level can view, edit, and report on all data owned by or shared with users below them in the role hierarchy, unless your sharing model for an object specifies otherwise.

Specifically, in the Organization-Wide Defaults related list, if the **Grant Access Using Hierarchies** option is disabled for a custom object, only the record owner and users granted access by the org-wide defaults receive access to the object's records.

Beyond setting the org-wide sharing defaults for each object, you can specify whether users have access to the data owned by or shared with their subordinates in the hierarchy. For example, the role hierarchy automatically grants record access to users above the record owner in the hierarchy.

By default, the **Grant Access Using Hierarchies** option is enabled for all objects. It can only be changed for custom objects.

To control sharing access using hierarchies for any custom object, enter Sharing Settings in the Quick Find box and select **Sharing Settings**. In the Organization Wide Defaults section, click **Edit**.

Deselect **Grant Access Using Hierarchies** if you want to prevent users from gaining automatic access to data owned by or shared with their subordinates in the hierarchies.

## **Define a Role Hierarchy**

Implementing a role hierarchy in the platform is easy once you have an idea of what the hierarchy should look like. It's best to start with your company's org chart and then consolidate different job titles into single roles wherever possible.


From Setup, use the Quick Find box to find **Roles**. If you see an introductory splash page called Understanding Roles, click **Set Up Roles** at the bottom of the page to skip to the actual tool.

The default view for this page is the tree view, as indicated in the drop-down list on the far right side of the Role Hierarchy title bar. When creating a role hierarchy, it's probably easiest to stick with this or the list view, because they both make it easy to see how the roles all fit together in the hierarchy.

The sorted list view is best if you know the name of a role that you want to find but aren't sure where it fits in the hierarchy, or if you don't want to click open all the tree nodes. For our purposes, we'll stick with the tree view



When you first start defining a role hierarchy, the tree view displays a single placeholder node with the name of your org. From this point, we need to add the name of the role that is highest up in the hierarchy—in our case, the CEO. If you're building your app with a free Developer Edition or Trailhead Playground org, you may have a role hierarchy predefined as a sample. That's all right. You can still follow along and create some more roles.

1. Just under the company name, click **Add Role**. If the CEO role already exists, click **Edit**.
2. In the **Label** text box, enter CEO. The **Role Name** text box autopopulates with CEO.
3. In the **This role reports to** text box, click the lookup icon  and click **Select** next to the name of your org. By choosing the name of the org in the **This role reports to** text box, we're indicating that the CEO role is a top-level position in our role hierarchy and doesn't report to anyone.
4. In the **Role Name as displayed on reports** text box, enter CEO. This text is used in reports to indicate the name of a role. Since a long role name, like Vice President of Product Development, takes extra space in your report columns, we recommend using a short but readable abbreviation.

5. Leave any other options, such as **Opportunity Access**, set to their defaults, and save. These access options don't have anything to do with our Recruiting app, and only appear if you have the org-wide defaults for a standard object set to a level more restrictive than **Public Read/Write**.

6. Now that you've created your first role, you can assign the appropriate user to it. Click **CEO**, and on the CEO role detail page, click **Assign Users to Role**.

Role  
**CEO**

Help for this Page ?

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: Universal Containers » CEO  
Siblings:

[Users in CEO Role \[0\]](#) | [Category Group Visibility Settings \[0\]](#)

**Role Detail** [Edit](#) [Delete](#)

Role Name	CEO	Role Name as displayed on reports	CEO
This role reports to	None	Sharing Groups	<a href="#">Role, Role and Subordinates</a>
Modified By	<a href="#">Jane Smith</a> , 8/16/2010 1:58 PM		
Customer Portal Role	<input type="checkbox"/>		

**Every role can have one or more assigned users.**

**Users in CEO Role** [Assign Users to Role](#) [New User](#) [Users in CEO Role Help](#) ?

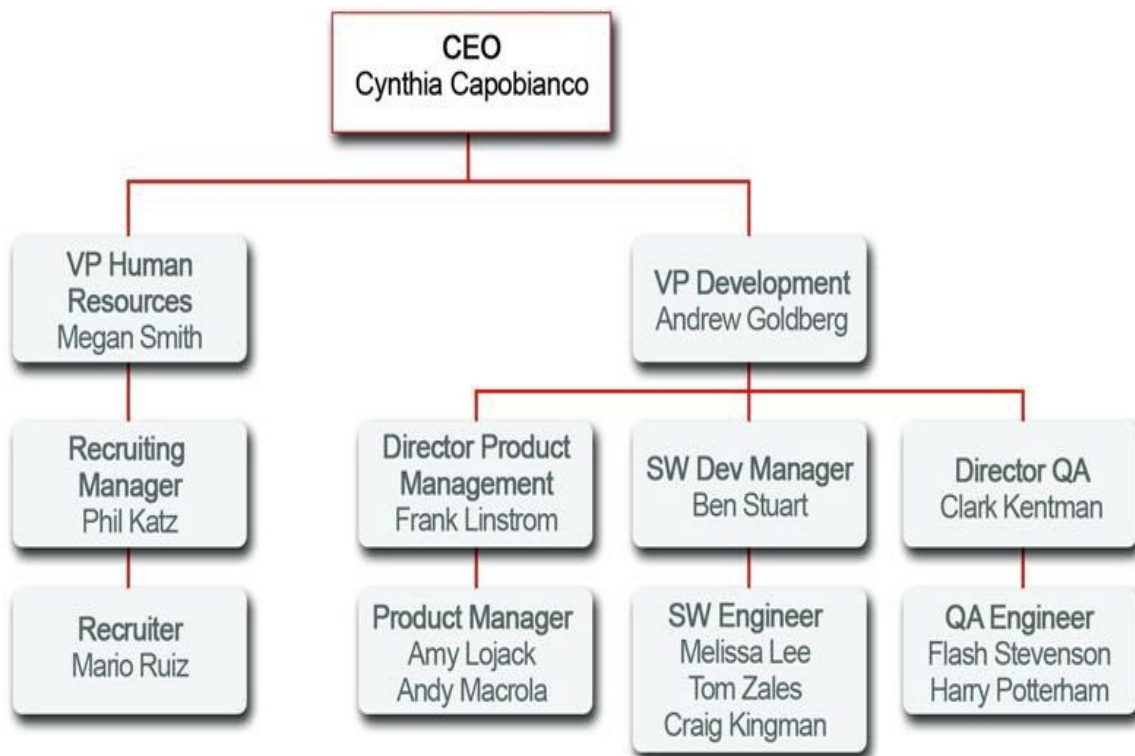
No records to display

In the **Available Users** drop-down list, select All Unassigned.

1. Choose a user from the list, and click **Add** to move her to the **Selected Users for CEO** list, then save.

If you return to the main Roles page from Setup, you can now see the new CEO role in the hierarchy. You can define the rest of the roles according to your role hierarchy diagram. There's no need to assign users to every role right away—you can do that later as you create the rest of your users and test out your app.

To create a role hierarchy in salesforce go to *Setup --> Administer --> Manage Users --> Roles*.



This role hierarchy automatically grants these kinds of record-level permissions:

- The CEO, Cynthia, can view and update every record that anyone else in the organization can view and update.
- The VP of Development, Andrew, can view and update any record that his managers or his managers' employees can view or update.
- The VP of Human Resources, Megan, can view and update any record that Phil, her recruiting manager, or Mario, Phil's recruiter, can view and update.
- The Recruiting Manager, Phil, can view and update any record that is owned by Mario, his recruiter.
- The Software Development manager, Ben, can view and update any record that is owned by Melissa, Tom, or Craig, his software engineers.
- The director of QA, Clark, can view and update any record that is owned by Flash or Harry, his QA engineers.