

Creation of Role

- 1.From the Quick find box search for the role and click on the roles option
- 2.select the set-up roles option
- 3.Below the CEO click on add role and enter the label name as a” HR Manager” and role name will be Automatically populated and click on save.

The screenshot displays the Salesforce Setup interface for the 'Roles' section. The left sidebar shows a search bar with 'roles' entered and a navigation menu with options like Users, Roles, Feature Settings, Sales, Service, and Case Teams. The main content area is titled 'Creating the Role Hierarchy' and shows a tree view of the organization's role hierarchy. The hierarchy starts with 'Knowledge Institute Of Technology' at the top, followed by 'CEO', 'CEQ', 'COO', 'HR Manager', 'SVP Customer Service & Support', 'SVP Human Resources', and 'SVP Sales & Marketing'. Each role in the hierarchy has an 'Add Role' button next to it. The 'HR Manager' role is highlighted in the hierarchy.

Search Setup

Setup Home Object Manager

roles

Users

Roles

Feature Settings

Sales

Contact Roles on Contracts

Contact Roles on Opportunities

Service

Case Teams

Case Team Roles

Contact Roles on Cases

Didn't find what you're looking for? Try using Global Search.

SETUP Roles

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click Add Role.

Your Organization's Role Hierarchy

Collapse All Expand All

Show in tree view

Knowledge Institute Of Technology

Add Role

CEO Edit Del Assign

Add Role

CEQ Edit Del Assign

Add Role

COO Edit Del Assign

Add Role

HR Manager Edit Del Assign

Add Role

SVP Customer Service & Support Edit Del Assign

Add Role

SVP Human Resources Edit Del Assign

Add Role

SVP Sales & Marketing Edit Del Assign

Add Role