Salesforce User Guide – IT System Administration

Adding a new user

All Account Executives and Correspondent Account Executives will require a Salesforce account.

1. Log in to the Salesforce Production Environment.
2. Click the gear Icon in the upper right corner.
3. Choose Setup from the dropdown menu.
4. In the setup screen, type “users” in the quick find box on the left side
5. Click the “users” link from the results that populate.
6. On the Users page click the New User Button.
7. Fill in all applicable fields on the New User – User Edit page.

Position	**Profile**	**Role**
National Sales Manager	National Sales Manager	National Sales Manager
Regional Sales Manager	Wholesale	Regional Sales Manager *(1-8)
Area Sales Manager	Wholesale	Area Sales Manager * (1-8)
Account Executive	Wholesale	Account Executive * (1-8)
Managing Director Correspondent Lending	Correspondent	Correspondent VP
VP Correspondent Customer Development	N/A	N/A
VP Correspondent Lending	Correspondent	Correspondent Executive
Vendor Manager	Vendor and Licensing	Vendor & Licensing Manager
Marketing Director	Marketing User	Marketing
Digital Marketing Specialist	Marketing User	Marketing
Web Administrator	Marketing User	Marketing
IT Project Manager	System Administrator	N/A
Business Analyst	System Administrator	N/A
System Administrator	System Administrator	N/A
Technology Specialist	System Administrator	N/A
Business Integration Manager	System Administrator	N/A

* Each wholesale team has a number assigned based off the Regional Sales Manager Role. The Account Executive will have the same number as their manager.

Team Number	**1**	**2**	**3**	**4**	**5**	**6**
Regional Sales Manager	Tony Guidicessi	Joe Tomasello	Nick Harvey	Ryan Barrus	Victoria Matney	
Area Sales Manager	Michael Kirk	Jason Sheridan	Adam Morris	Ryan Moon	Reggie Brutus	Ken Fox
Area Sales Manager		Christina Fairbanks		Daniel Godwin		

Area Sales Manager				Megan Willie		
Area Sales Manager				Tracy Brinkly		

Updating a user

When a user’s job description or team has changed Salesforce will require an update. Reference the table above to confirm whether or not a user’s profile and role will need to be changed in Salesforce. If an AE is changing managers their role will need to be updated to the “Account Executive X” number that matches their new manager.

Profiles and Roles can be accessed from the Setup Menu in Salesforce (Gear Icon in the top right)

<Insert Steps and Screenshots>

Deactivating a user

Upon notification of a user’s resignation or termination their account will need to be frozen and deactivated.

1. Log into Salesforce.com
2. Click the Gear icon in the top right corner and click “Setup” from the dropdown menu.
3. In the menu on the left side, under the Administration Section select Users
4. In the sub list of Users options select Users.
5. Search for the user
6. Click the user’s full name to access their account setup page.
7. Click the Freeze button at the top of the User Detail section.
8. Confirm with the Vendor Manager that the assigned accounts are being transferred. (Vendor Manager’s responsibility).
9. Click the Edit button at the top of the User Detail section.
10. Click the Active checkbox and confirm that the checkmark is now removed (the user is now inactive and will not be counted against the company’s license limit)