Phase 2: creating the two users needed for the project: a Sales Rep and a Sales Manager

Role
Sales Manager

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: Prof. Ram Meghe Institute of Technology and Research » Sales Manager
Siblings: CEO

Users in Sales Manager Role [0]

Role Detail   [Edit] [Delete]

Label	Sales Manager	Role Name	Sales_Manager
This role reports to	None	Role Name as displayed on reports	
Modified By	Anuj Pande, 9/25/2025, 10:11 AM	Sharing Groups	Role, Role and Internal Subordinates
Opportunity Access	Users in this role can **edit** all opportunities associated with accounts that they own, regardless of who owns the opportunities		
Case Access	Users in this role can **edit** all cases associated with accounts that they own, regardless of who owns the cases		

👤 **Users in Sales Manager Role**   [Assign Users to Role] [New User]   Users in Sales Manager Role Help ?

No records to display

Role
Sales Rep

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: Prof. Ram Meghe Institute of Technology and Research » Sales Manager » Sales Rep

Users in Sales Rep Role [0]

Role Detail   [Edit] [Delete]

Label	Sales Rep	Role Name	Sales_Rep
This role reports to	Sales Manager	Role Name as displayed on reports	
Modified By	Anuj Pande, 9/25/2025, 10:14 AM	Sharing Groups	Role, Role and Internal Subordinates
Opportunity Access	Users in this role can **edit** all opportunities associated with accounts that they own, regardless of who owns the opportunities		
Case Access	Users in this role can **edit** all cases associated with accounts that they own, regardless of who owns the cases		

👤 **Users in Sales Rep Role**   [Assign Users to Role] [New User]   Users in Sales Rep Role Help ?

No records to display

Setting Up Their **Roles**. The Role Hierarchy Is Crucial Because It Allows Users Higher in The Hierarchy (Like A Manager) To View and Report On The Data Of Users Below Them.

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

Show in tree view

Collapse All Expand All

- **Prof. Ram Meghe Institute of Technology and Research**
  - Add Role
  - **CEO** Edit | Del | Assign
    - Add Role
  - **Sales Manager** Edit | Del | Assign
    - Add Role
    - **Sales Rep** Edit | Del | Assign
      - Add Role