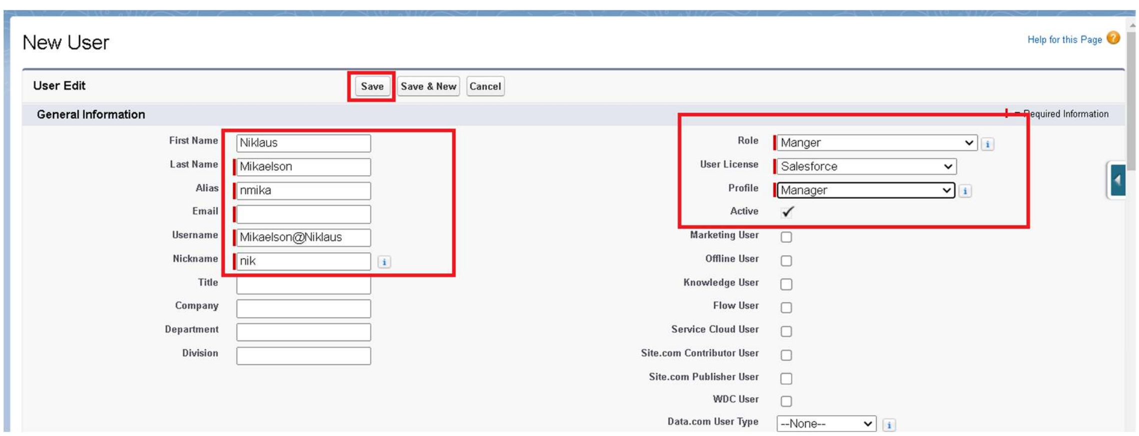
Users

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. The user account identifies the user, and the user account settings determine what features and records the user can access.

Create User

1. Go to setup >> type users in quick find box >> select users >> click New user.
2. Fill in the fields
   1.First Name : Niklaus
   2.Last Name : Mikaelson
   3.Alias : Give a Alias Name
   4.Email id : Give your Personal Email id
   5.Username : Username should be in this form: text@text.text
   6.Nick Name : Give a Nickname
   7.Role : Manager
   8.User licence : Salesforce
   9.Profiles : Manager



3. Save.

creating another users

1. Repeat the steps and create another user using
   a. Role : sales person

b. User licence : Salesforce Platform
c. Profile : sales person

Note : create atleast 3 users with these permissions.

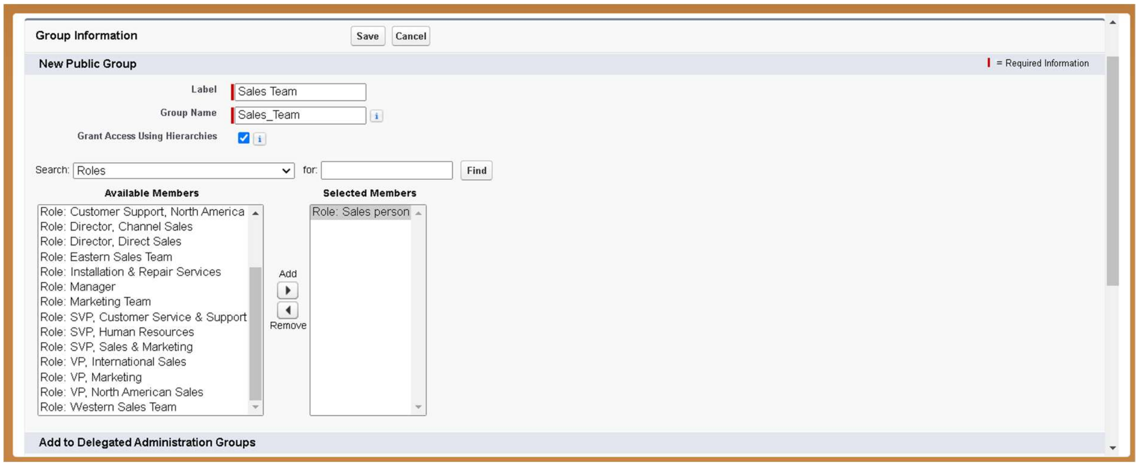
Public groups

Public groups are a valuable tool for Salesforce administrators and developers to streamline user management, data access, and security settings. By creating and using public groups effectively, you can maintain a secure and organized Salesforce environment while ensuring that users have appropriate access to the resources they need.

Creating New Public Group

1. Go to setup >> type users in quick find box >> select public groups >> click New.

2. Give the Label as “sales team”.
3. Group name is autopopulated.
4. Search for Roles.
5. In Available Members select Sales person and click on add it will be moved to selected member.
6. Click on save.


Group Information
Save
Cancel
New Public Group
= Required Information
Label
Sales Team
Group Name
Sales_Team
Grant Access Using Hierarchies
Search:
Roles
for:
Find
Available Members
Role: Customer Support, North America
Role: Director, Channel Sales
Role: Director, Direct Sales
Role: Eastern Sales Team
Role: Installation & Repair Services
Role: Manager
Role: Marketing Team
Role: SVP, Customer Service & Support
Role: SVP, Human Resources
Role: SVP, Sales & Marketing
Role: VP, International Sales
Role: VP, Marketing
Role: VP, North American Sales
Role: Western Sales Team
Add
Remove
Selected Members
Role: Sales person
Add to Delegated Administration Groups