

Team ID : LTVIP2024TMID11578

Team member : T B BHAVANI

Profile

To Create A New Profile

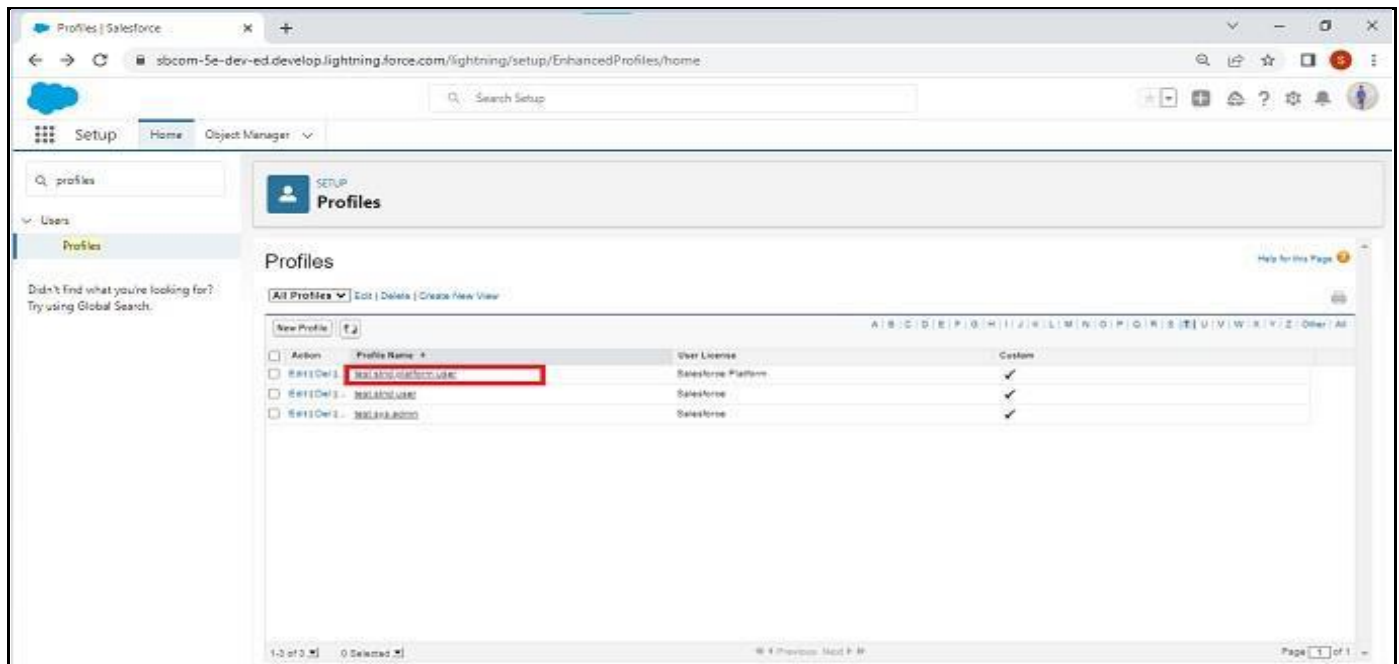
1. Go to setup ? type profiles in quick find box ? click on profiles ? clone the desired profile (standard platform user is pref) and clone that profile

The screenshot shows the Salesforce Setup interface. In the left sidebar, the search bar contains the text 'profile' (labeled 1) and the 'Profiles' link is highlighted (labeled 2). The main content area displays the 'Profiles' page with a table of existing profiles. The 'Clone' link for the 'Standard Platform User' profile is highlighted (labeled 3).

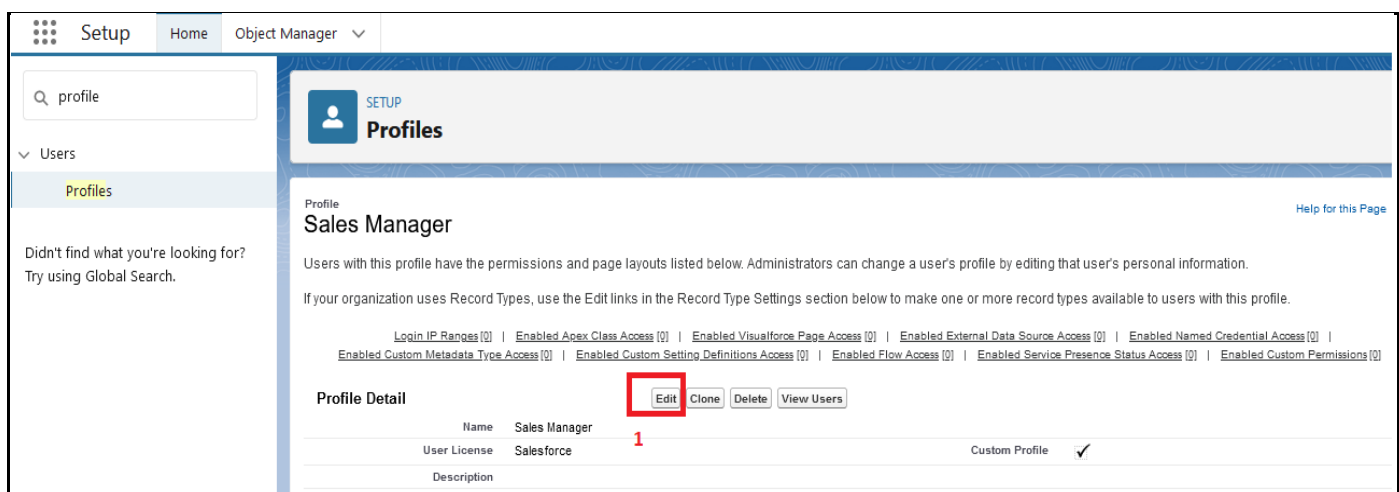
Action	Profile Name	User License	Custom
Edit Del ...	Sales Manager	Salesforce	<input checked="" type="checkbox"/>
Edit Clone	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
Edit Del ...	School profile	Salesforce	<input checked="" type="checkbox"/>
Edit Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
Edit Clone	Solution Manager	Salesforce	<input type="checkbox"/>
Edit Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
Edit Clone	Standard User	Salesforce	<input type="checkbox"/>
Edit Clone	System Administrator	Salesforce	<input type="checkbox"/>

2. Enter a Profile Name(Sales Manager) And click on Save

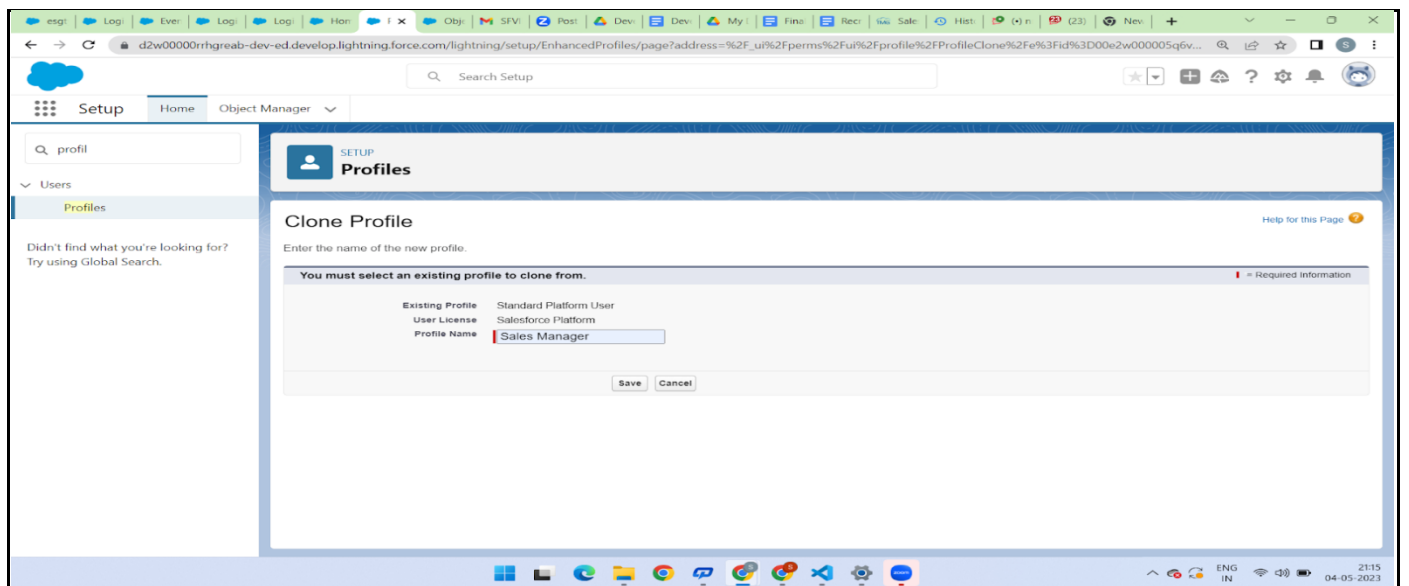
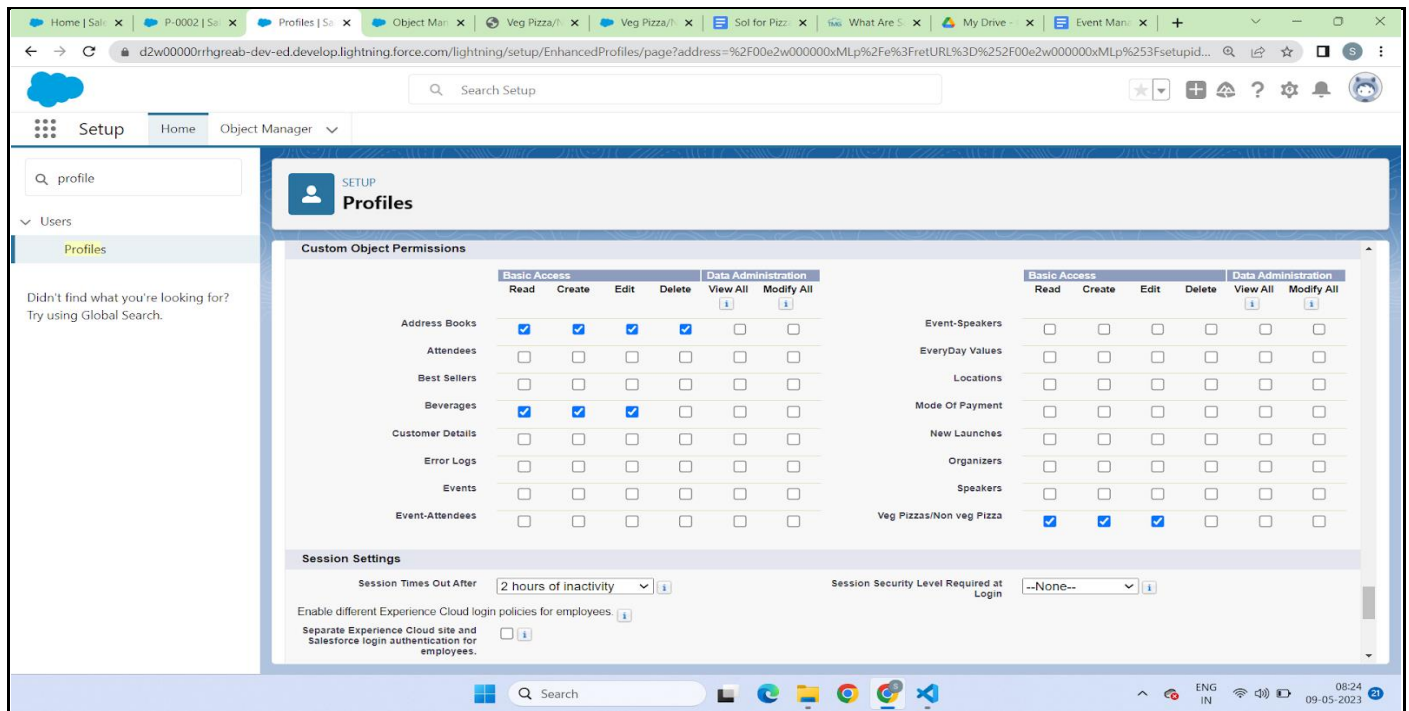
3. Click on the new created profile



4. While still on the profile page, then click Edit.



5. For the sales manager profile give the following access



6. Similarly clone the standard platform profile and give the name as Sales Executive
And give the same access to the as of sales manager

7. Again clone the standard User profile and this time give all access for the objects, tabs and field
And give the profile name as Delivery Person

User Adoption

As a new administrator, you perform user management tasks like creating and editing users, resetting passwords, granting permissions, configuring data access, and much more. In this unit, you will learn about users and how you add users to your Salesforce org.

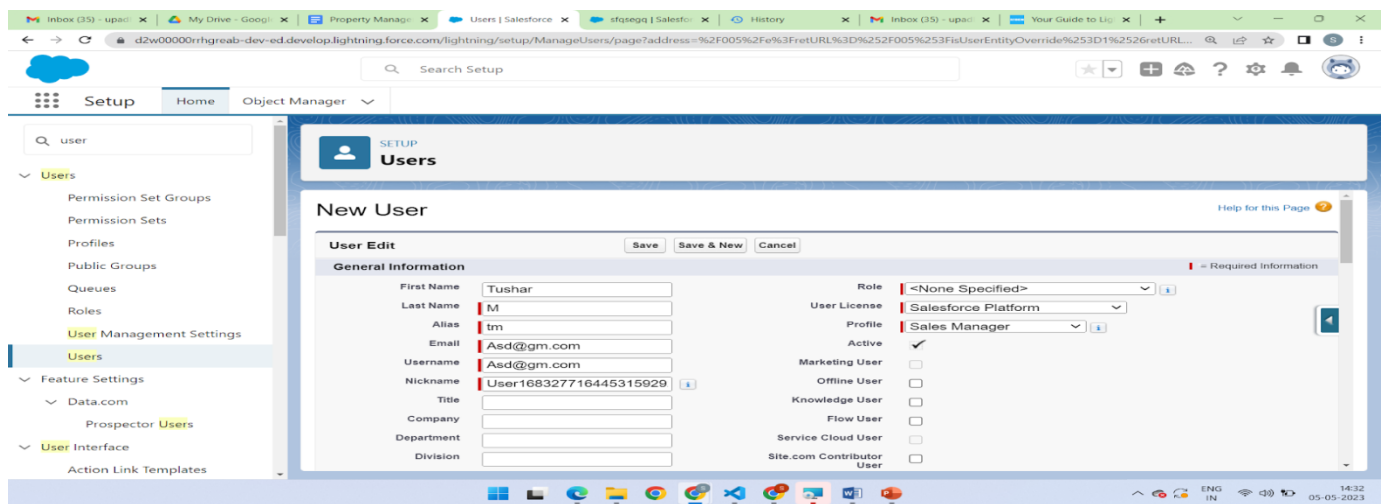
Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access. Each user account contains at least the following:

- Username
- Email Address
- User's First Name (optional)
- User's Last Name
- Alias
- Nickname
- License
- Profile
- Role (optional)

Create the 3 User with 3 profile which we have created

Activity - 1

1. Go to the Gear Icon? Click the setup? click on the home button and in the quick find box search for the user? Click on the user? then click on new? fill the fields



2. Follow the above and create 2 more user? Marketing manager and Sales Rep

