**User Management Document:**

**Guidelines for Adding Users:**

* Your username must be unique across all Salesforce orgs. The username must be in the format of an email address, for example, jane@salesforce.com. This email username doesn’t have to work. You can have the same functioning email address associated with your account across orgs—only the username in the form of an email address must remain unique.
* If your name includes non-English characters, add the specified language to the mail format settings within Outlook if viewing email in Outlook.
* The account verification link emailed to new users expires in six months, and users have to change their password the first time they log in. Users who click the account verification link but don’t set a password need an admin to reset their password before they can log in.
* You can change a Salesforce license to a Force.com license, but you can’t change a Force.com license to a Salesforce license.
* Not all options are available for all license types. For example, the Marketing User and Allow Forecastingoptions are not available for Force.com user licenses because the Forecasts and Campaigns tabs are not available to users with a Force.com license. Force.com user licenses are not available for Professional, Group, or Contact Manager Editions.
* In Performance, Unlimited, Enterprise, and Developer Edition orgs, you can select Send Apex Warning Emails to send email to the user when an application that invokes Apex uses more than half of the resources specified by the governor limits. You can use this feature during Apex code development to test the amount of resources used at runtime.

Please find below link to know more about guidelines for adding User:

<https://help.salesforce.com/apex/HTViewHelpDoc?id=users_adding_guidelines.htm&language=en_US>

# Licenses Overview:

# To enable specific Salesforce functionality for your users, you must choose one user license for each user. To enable additional functionality, you can assign permission set licenses and feature licenses to your users or purchase usage-based entitlements for your organization.

Salesforce provides the following types of licenses and usage-based entitlements.

* [**User Licenses**](https://help.salesforce.com/apex/HTViewHelpDoc?id=users_understanding_license_types.htm&language=en_US)  
  A user license determines the baseline of features that the user can access. Every user must have exactly one user license. You assign user permissions for data access through a profile and optionally one or more permission sets.
* [**Permission Set Licenses**](https://help.salesforce.com/apex/HTViewHelpDoc?id=users_permissionset_licenses_overview.htm&language=en_US)  
  A permission set is a convenient way to assign users specific settings and permissions to use various tools and functions. Permission set licenses incrementally entitle users to access features that are not included in their user licenses. Users can be assigned any number of permission set licenses.
* [**Feature Licenses Overview**](https://help.salesforce.com/apex/HTViewHelpDoc?id=users_understanding_feature_licenses.htm&language=en_US)  
  A feature license entitles a user to access an additional feature that is not included with his or her user license, such as Marketing or Work.com. Users can be assigned any number of feature licenses.
* [**Usage-based Entitlements**](https://help.salesforce.com/apex/HTViewHelpDoc?id=users_understanding_tenant_usage_entitlements.htm&language=en_US)  
  A usage-based entitlement is a limited resource that your organization can use on a periodic basis—such as the allowed number of monthly logins to a Partner Community or the record limit for Data.com list users.

Please find below link to know more about License overview:

<https://help.salesforce.com/apex/HTViewHelpDoc?id=users_licenses_overview.htm&language=en_US>

# View Your Organization’s Feature Licenses:

1. From Setup, enter Company Information in the Quick Find box, then select Company Information.
2. See the Feature Licenses related list.

Please follow below link to know more how to view your Organization’s Licenses:

<https://help.salesforce.com/apex/HTViewHelpDoc?id=users_viewing_feature_licenses.htm&language=en_US>

# View and Manage Users:

In the user list, you can view and manage all users in your org, partner portal, and Salesforce Customer Portal.

1. From Setup, enter Users in the Quick Find box, and then select **Users**.
2. From the user list, you can:

* [Create one user](https://help.salesforce.com/apex/HTViewHelpDoc?id=adding_new_users.htm&language=en_US).
* [Create multiple users](https://help.salesforce.com/apex/HTViewHelpDoc?id=users_adding_multiple.htm&language=en_US).
* [Reset passwords for selected users](https://help.salesforce.com/apex/HTViewHelpDoc?id=resetting_and_expiring_passwords.htm&language=en_US).
* [Edit a user](https://help.salesforce.com/apex/HTViewHelpDoc?id=editing_users.htm&language=en_US).
* View a user’s detail page by clicking the name, alias, or username.
* View or edit a profile by clicking the profile name.

**Tips for Managing Users**

Create custom fields for users and set custom links to display on the user detail page. To access these options, go to the object management settings for users.

* Use the sidebar search to search for any user in your org, regardless of the user’s status. When using a lookup dialog from fields within records, the search results return only active users. You can also run user reports in the Reports tab.
* To simplify user management in orgs with many of users, delegate aspects of user administration to non-administrator users.

**Note:** You cannot delegate administrative duties related to your org to partner portal or Customer Portal users. However, you can delegate some portal administrative duties to portal users.

Please find below link to know more about view and manage User:

https://help.salesforce.com/apex/HTViewHelpDoc?id=admin\_users.htm

# User Fields:

Please find below link to know more about user fields:

https://help.salesforce.com/apex/HTViewHelpDoc?id=user\_fields.htm&language=en\_US

# Add a Single User:

Depending on the size of your organization or your new hire onboarding process, you may choose to add users one at a time. The maximum number of users you can add is determined by your Salesforce edition.

1. Read the guidelines for adding users.
2. From Setup, enter Users in the Quick Find box, and then select Users.
3. Click New User.
4. Enter the user’s name and email address and a unique username in the form of a email address. By default, the username is the same as the email address.

**Important:**

Your username must be unique across all Salesforce orgs. The username must be in the format of an email address, for example, jane@salesforce.com. This email username doesn’t have to work. You can have the same functioning email address associated with your account across orgs—only the username in the form of an email address must remain unique.

1. In Professional, Enterprise, Unlimited, Performance, and Developer Editions, select a Role.
2. Select a User License. The user license determines which profiles are available for the user.
3. Select a profile, which specifies the user’s minimum permissions and access settings.
4. If your organization has Approvals enabled, you can set the user’s approver settings, such as delegated approver, manager, and preference for receiving approval request emails.
5. Check Generate new password and notify user immediately to have the user’s login name and a temporary password emailed to the new user.

Please find below link to know more about how to add a single user:

<https://help.salesforce.com/apex/HTViewHelpDoc?id=adding_new_users.htm>

# Add Multiple Users:

You can quickly add up to 10 users at a time to your organization. Your Salesforce edition determines the maximum number of users that you can add.

1. From Setup, enter Users in the Quick Find box, and then select Users.
2. Click Add Multiple Users.
3. If multiple user license types are available in your organization, select the user license to associate with the users you plan to create. The user license determines the available profiles.
4. Specify the information for each user.
5. To email a login name and temporary password to each new user, select Generate passwords and notify user via email.
6. Click Save.
7. To specify more details for the users that you’ve created with this method, edit individual users as needed.

Please find below link to know more about how to add multiple users:

https://help.salesforce.com/apex/HTViewHelpDoc?id=users\_adding\_multiple.htm&language=en\_US

# Considerations for Editing Users:

Be aware of the following behaviors when editing users.

**Usernames:**

A username must be unique across all Salesforce organizations. It must use the format of an email address (such as xyz@abc.org), but doesn’t need to be a real email address. While users can have the same email address across organizations, usernames must be unique.

If you change a username, a confirmation email with a login link is sent to the email address associated with that user account. If an organization has multiple login servers, sometimes users can’t log in immediately after you’ve changed their usernames. The change can take up to 24 hours to replicate to all servers.

**Changing email addresses:**

If Generate new password and notify user immediately is disabled when you change a user’s email address, Salesforce sends a confirmation message to the email address that you entered. Users must click the link provided in that message for the new email address to take effect. This process ensures system security.

**Personal information:**

Users can change their personal information after they log in.

**User sharing:**

If the organization-wide default for the user object is Private, users must have Read or Write access to the target user to access that user’s information.

**Domain names:**

You can restrict the domain names of users’ email addresses to a list of specific domains. Any attempt to set an email address with another domain results in an error message. To enable this functionality for your organization, contact Salesforce.

Please find below link to know more about Consideration for editing user:

https://help.salesforce.com/apex/HTViewHelpDoc?id=users\_edit\_considerations.htm&language=en\_US

# Edit Users:

1. From Setup, enter Users in the Quick Find box, and then select Users.
2. Click Edit next to a user’s name.
3. Change the settings as needed.
4. Click Save.

Please find below link to know more about how to edit users:

https://help.salesforce.com/apex/HTViewHelpDoc?id=editing\_users.htm&language=en\_US

# Unlock Users:

Users can be locked out of an organization if they enter incorrect login credentials too many times. Unlock users to restore their access.

1. From Setup, enter Users in the Quick Find box, and then select Users.
2. Select the locked user.
3. Click Unlock.

**Note**: This button appears only when a user is locked out.

Please find below link to know more about how to unlock users:

<https://help.salesforce.com/apex/HTViewHelpDoc?id=users_unlock.htm&language=en_US>

# Reset Passwords for Your Users:

As an administrator, you can reset a user’s password for better protection or to unlock a user if the user is locked out.

**To reset a user’s password**:

1. From Setup, enter Users in the Quick Find box, and then select Users.
2. Select the checkbox next to the user’s name. Optionally, to change the passwords for all currently displayed users, check the box in the column header to select all rows.
3. Click Reset Password. The user receives an email that contains a link and instructions to reset the password.

**Note**:

* A password created this way doesn’t expire, but users must change the password the first time they log in.
* After resetting a password, users might be required to activate their computers to successfully log in to Salesforce.
* Resetting a locked-out user’s password automatically unlocks the user’s account.
* When a user loses a password, the user can click the forgot password link on the login page to receive an email with steps to reset a password. The user must correctly answer the security question to reset the password. In Password Policies, you can customize the security question page that the user sees with information about where to go to for help.
* Resetting a password also resets the user’s security token.

Please find below link to know more about how to reset users Password:

https://help.salesforce.com/apex/HTViewHelpDoc?id=resetting\_and\_expiring\_passwords.htm