

Date:13/07/2023

Name: Shashikumar Reddy

Step1:

Create a user's Sales Manager and Sales representative for Sales Cloud.

Step2:

Create a user's Service Manager and Service representative for Service Cloud.

Step3:

Create a user's Experience Manager and Experience Representative for Experience Cloud.

Step4:

Create a profile for each cloud, such as Sales Profile, Service Profile, and Experience Profile.

Step5:

Set Permission sets.

protivity99-dev-ed.develop.my.salesforce.com/001/o

Protivity Internal salesmanager user

Search...

Sales

Home Chatter Leads **Accounts** Contacts Opportunities Contracts Cases Solutions Products Reports Dashboards Project Plan Plan Line Item Calculator\_Page +

Create New...

Recent Items  
No records to display

Recycle Bin

Quick Create  
Account Name  
Phone  
Website  
Save

Accounts Home  
View: New This Week Go! Clone Create New View

Recent Accounts  
No recent records. Click Go or select a view from the dropdown to display records.

Reports  
Active Accounts  
Accounts with last activity > 30 days  
Account Owners  
Contact Role Report  
Account History Report  
Partner Accounts  
Go to Reports >

Tools  
Sales Methodologies

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Protivity Internal Sales Representative

Search...

Sales

Home Chatter Leads **Accounts** Contacts Opportunities Contracts Cases Solutions Products Reports Dashboards Project Plan Plan Line Item Calculator\_Page +

Create New...

Recent Items  
man-1

Recycle Bin

Accounts Home  
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Setup

Home

Object Manager

Search Setup

?

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

User Interface

Action Link Templates

Actions & Recommendations

App Menu

Custom Labels

Devch Settings

Roles

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

Collapse All

Expand All

Show in tree view

Protiviti

Add Role

Admin

Add Role

CEO

Add Role

Experience Manager

Add Role

Experience Representative

Add Role

Sales Manager

Add Role

Sales Representative

Add Role

Service Manager

Add Role

Service Representative

Add Role

SVP Customer Service & Support

Add Role

SVP Human Resources

Add Role

Users

<input type="checkbox"/>	<a href="#">Edit</a>	approver_user1	uaqr	shashikumarreddy023@gmail.com	VP International Sales	<input type="checkbox"/>	shashi-user1
<input type="checkbox"/>	<a href="#">Edit</a>	approver_user2	uaqr	shashikumarreddy0234@gmail.com		<input type="checkbox"/>	shashi-user1
<input type="checkbox"/>	<a href="#">Edit</a>	approver_user3	uaqr	shashikumarreddy0235@gmail.com		<input checked="" type="checkbox"/>	shashi-user1
<input type="checkbox"/>	<a href="#">Edit</a>	Chatter Expert	Chatter	chattv00d2t0000000ooyealr7glt5uldes@chatter.salesforce.com		<input type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	<a href="#">Edit</a>	Experience_Testing	tepc	shashikum123@gmail.com	uaqr Customer Person Account	<input type="checkbox"/>	Customer Community Plus User
<input type="checkbox"/>	<a href="#">Edit</a>	Manager_Experience	emana	shashikum56789@gmail.com	Experience Manager	<input type="checkbox"/>	ExperienceProfile
<input type="checkbox"/>	<a href="#">Edit</a>	Reddy_Shashikumar	SRedd	shashikumarreddy0443@gmail.com	Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	<a href="#">Edit</a>	Repräsentative_Experience	erepr	shashikumarreddy02303@gmail.com	ExperienceRepresentative	<input type="checkbox"/>	ExperienceProfile
<input type="checkbox"/>	<a href="#">Edit</a>	Repräsentative_Sales	srepr	shashikumarreddy02302@gmail.com	Sales Representative	<input checked="" type="checkbox"/>	SalesManagerProfile1
<input type="checkbox"/>	<a href="#">Edit</a>	Repräsentative_Service	smana	shashikumarreddy02301@gmail.com	ServiceRepresentative	<input type="checkbox"/>	kk
<input type="checkbox"/>	<a href="#">Edit</a>	S1	s1	shashikumarreddy02305@gmail.com		<input type="checkbox"/>	Service Supervisor
<input type="checkbox"/>	<a href="#">Edit</a>	user_Ceo	ouser	shashikumarreddy02399999@gmail.com	CEO	<input type="checkbox"/>	shashi-user1
<input type="checkbox"/>	<a href="#">Edit</a>	User_Integration	inteo	integration@00d2t0000000ooyeal.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	<a href="#">Edit</a>	user_salesmanager	suser	shashikumarreddy0444444@gmail.com	Sales Manager	<input type="checkbox"/>	SalesManagerProfile1
<input type="checkbox"/>	<a href="#">Edit</a>	User_Security	seo	insightssecurity@00d2t0000000ooyeal.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User
<input type="checkbox"/>	<a href="#">Edit</a>	user_service manager	suser	shashikumarreddy112@gmail.com	Service Manager	<input type="checkbox"/>	ServiceManagerProfile
<input type="checkbox"/>	<a href="#">Edit</a>	user_service manager	suser	shashikumarreddy0230000@gmail.com	VP North American Sales	<input type="checkbox"/>	kk

Show me fewer records per list page