1. [Customize an Org to Support a New Business Unit]
2. [Manage User Access]

Manage User Access

Introduction

In this project, you'll get hands-on practice setting up some of the basic but oh-so-useful functions a business needs when implementing Salesforce—from adding users and creating Chatter groups to modifying your data model to fit your business needs and automating processes for max efficiency.

You'll find step-by-step instructions on how to get some important functions going for team members in your Customer Support department. By going through these exercises, you'll learn what's possible with the Salesforce platform and some of its specific applications. So let's dive in.

Create New Users

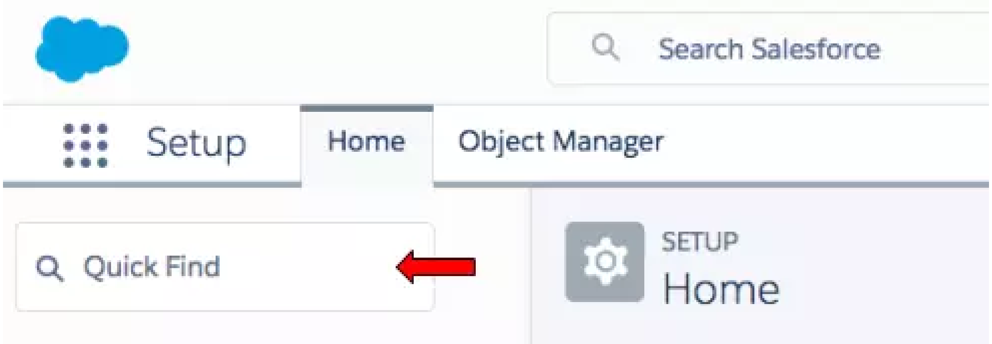
It just takes a few clicks, and you're ready to enter a new user's information into your Salesforce org. Some fields are mandatory (such as name and email), and others can be skipped if they're not applicable to a particular user.

> **Note**
>
> The email address you fill in for a new user auto-populates to become that user's username. Each username must be unique within Salesforce, but that's not the case with email addresses. For this project, you'll fill in your own email address for new users. When their usernames auto-populate with your email address, replace the usernames with a unique username using this formula:user's first initial + user's last name @ your initials + your favorite color + .com. For example: ahartzler@DKorange.com

Kenya Collins, the manager over your Customer Support department, asked you to add her new team members to your org. Let's start by creating a user record for Fumiko Suzuki, a member of the Customer Support team headquartered in Japan. Use these details:

1. Click **Setup** and select **Setup**.

2. Enter `Users` in the Quick Find Box, then select **Users**.



3. Click **New User**. Complete the new user record with these details:

Field	**Value**
First Name	`Fumiko`
Last Name	`Suzuki`
Alias	`fsuzu`
Email	(enter an email address)
Username	(auto-populates with your email address-replace using the formula in the note above)
Nickname	`fsuzuki`
Title	`Customer Support Rep`
Department	`Customer Support`
Role	Customer Support, International
User License	Salesforce Platform

4. Next, fill in her Locale settings, including time zone and language.

Field	**Value**
Time Zone	(GMT +09:00) Japan Standard Time (Asia/Tokyo)
Locale	Japanese (Japan)

Language	Japanese

5. Click **Save & New.**
6. Follow the same steps to add American-based customer support rep Aaron Hartzler, sticking with the default locale settings and using these details:

Field	Value
First Name	`Aaron`
Last Name	`Hartzler`
Alias	ahart (auto-populates)
Email	(fill in your own email address)
Username	(auto-populates with your email address-replace using the formula in the note above)
Nickname	`ahartzler`
Title	`Customer Support Rep`
Department	`Customer Support`
Role	Customer Support, North America
User License	Salesforce
Profile	Standard User

7. Click **Save.**

Now that you've set up a few users, move on to the next step where you'll help them get chatty.

Assessment Complete!

+100 points

Customize an Org to Support a New Business Unit
100%
Progress: 100%
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