

Setup

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Didn't find what you're looking for? Try using Global Search.

SETUP

Users

All Users

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. Let's Go

View: All Users | Full | Create New View

New User | Reset Password(s) | Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Full	Chatter Expert	Chatter	chatter.00000000000000000000000000000000@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	CPIC, Orgform	CPIC	cpic.210940c91842@orgform.salesforce.com		✓	System Administrator
<input type="checkbox"/> Full	shivas, Urm	urm	urm.shivas.cs22@salesforce.com		✓	System Administrator
<input type="checkbox"/> Edit	User, Integration	integ	integration@00000000000000000000000000000000@salesforce.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User, Security	sec	security@00000000000000000000000000000000@salesforce.com		✓	Analytics Cloud Security User
<input type="checkbox"/> Edit	User, Test	tuser	test.user@localrm.com		✓	Standard User

New User | Reset Password(s) | Add Multiple Users

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z | Other | All

6.Profiles

- **System Administrator** → Full access
- **Customer Manager** → Manage all customers & requests
- **Provider Manager** → Manage all providers & assignments
- **Customer Agent** → Handle assigned customer requests
- **Service Provider** → Update assigned jobs only

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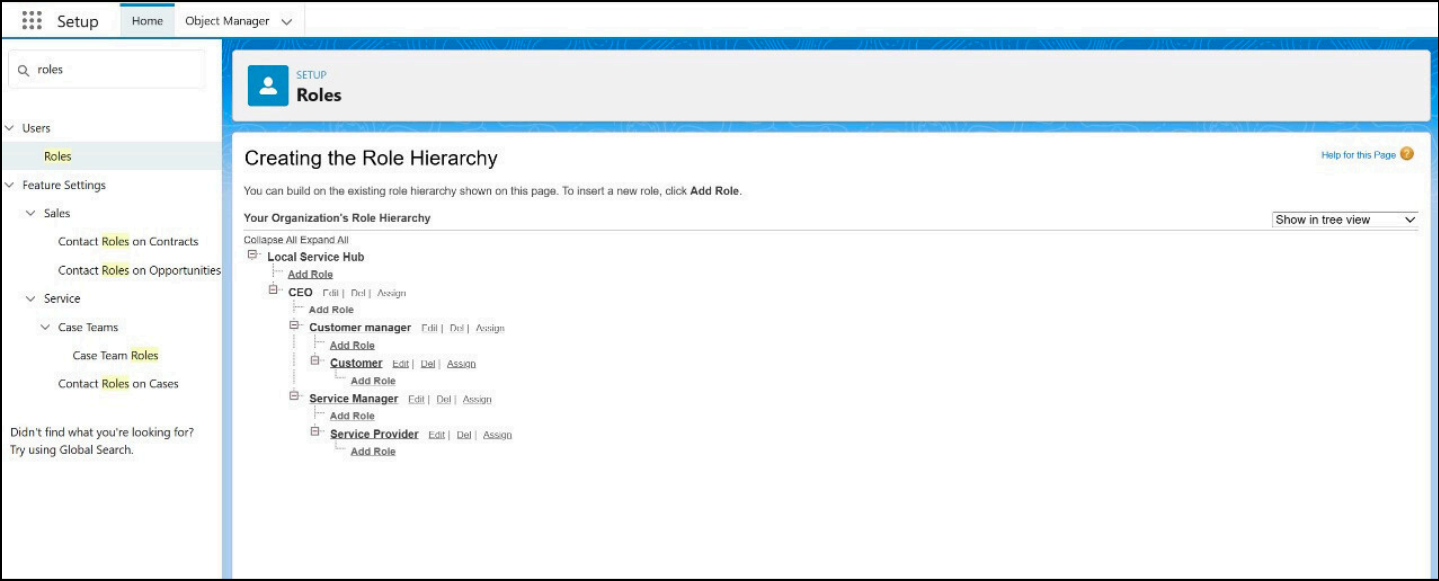
Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Full	Chatter Expert	Chatter	chatter.00000000000000000000000000000000@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	CPIC, Orgform	CPIC	cpic.210940c91842@orgform.salesforce.com		✓	System Administrator
<input type="checkbox"/> Full	shivas, Urm	urm	urm.shivas.cs22@salesforce.com		✓	System Administrator
<input type="checkbox"/> Edit	User, Integration	integ	integration@00000000000000000000000000000000@salesforce.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User, Security	sec	security@00000000000000000000000000000000@salesforce.com		✓	Analytics Cloud Security User
<input type="checkbox"/> Edit	User, Test	tuser	test.user@localrm.com		✓	Standard User

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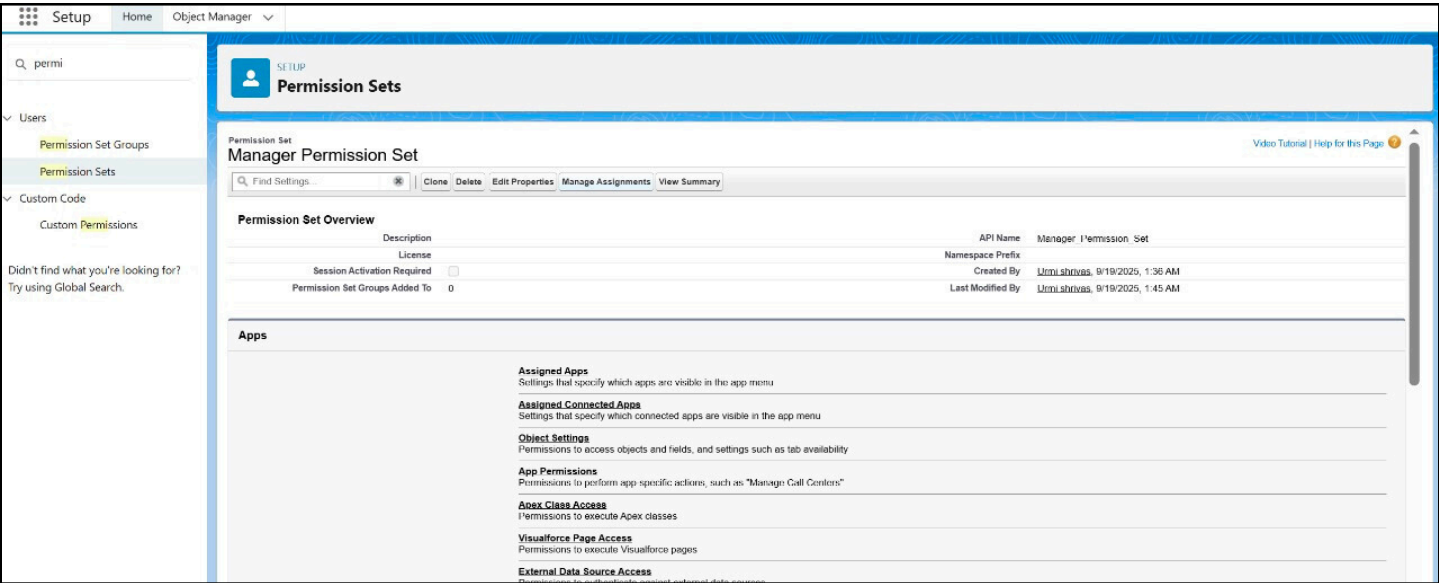
7. Roles Hierarchy

- Ensures proper data visibility and access control based on organizational hierarchy.
- Higher roles (e.g., CEO/Admin) can view and manage records of all subordinates.
- Lower roles (Agents/Service Providers) have access only to their relevant records.



8.Permission Sets

- **Extra Access** → For additional object/field access
- **Report Access** → To create & view reports
- **Dashboard Access** → To view dashboards
- Assigned to users as per need, beyond their profiles



9. Organization-Wide Defaults (OWD)

- **Set OWD** → Private for Customer, Service Request, and Course objects
- Ensures record-level security and controlled data sharing.

Setup

Home

Object Manager

Q. SHARING

Security

Guest User

Sharing

Rule Access

Report

Sharing Settings

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Sharing Settings

Organization-Wide Sharing Defaults Edit

Help for this Page

Edit your organization-wide sharing defaults below. Changing these defaults will cause all sharing rules to be recalculated. This could require significant system resources and time depending on the amount of data in your organization. Setting an object to Private makes records visible to record owners and those above them in the role hierarchy, and access can be extended using sharing rules.

Save

Cancel

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	<input type="checkbox"/>
Account and Contract	Public Read/Write	Private	<input type="checkbox"/>
Order	Controlled by Parent	Controlled by Parent	<input type="checkbox"/>
Contact	Controlled by Parent	Controlled by Parent	<input type="checkbox"/>
Asset	Controlled by Parent	Controlled by Parent	<input type="checkbox"/>
Opportunity	Public Read/Write	Private	<input type="checkbox"/>
Case	Public Read/Write/Transfer	Private	<input type="checkbox"/>
Campaign	Public Full Access	Private	<input type="checkbox"/>
Campaign Member	Controlled by Campaign	Controlled by Campaign	<input type="checkbox"/>
User	Public Read Only	Private	<input type="checkbox"/>
Individual	Public Read/Write	Private	<input type="checkbox"/>
Voice Call	Private	Private	<input type="checkbox"/>
Activity	Private	Private	<input type="checkbox"/>
Calendar	Hide Details and Add Events	Hide Details and Add Events	<input type="checkbox"/>
Price Book	Use	Use	<input type="checkbox"/>
Product	Public Read/Write	Public Read/Write	<input type="checkbox"/>
Agent Work	Public Read Only	Private	<input type="checkbox"/>
Alternative Payment Method	Private	Private	<input type="checkbox"/>
Analytics User Attribute Function Token	Public Read Only	Private	<input type="checkbox"/>