



Getting Started with SalesForce CRM

Getting Started with SALESFORCE Part X

Description:

BISP is committed to provide BEST learning material to the beginners and advance learners. In the same series, we have prepared a complete end-to end Hands-on Beginner's Guide for SalesForce. The document focuses on security, permission and access rights. **Join our professional training program and learn from experts.**

History:

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Contents

Contents.....	2
Security and sharing Data in Salesforce.com.....	3
User permissions and Access Rights:.....	3
A permission set is a collection of settings and permissions that give users access to various tools and functions you can set user permissions and all so specify roll by using Salesforce.com, In Salesforce, you can control access to data at many different levels.	
.....	3
Permission sets include settings for :	3
View And Managing User.....	17
Mass Email Users.....	20
Permission Sets in Salesforce.....	22
Public Groups	25
Queues.....	26
Login History.....	27

Security and sharing Data in Salesforce.com

User permissions and Access Rights:

A permission set is a collection of settings and permissions that give users access to various tools and functions you can set user permissions and all so specify roll by using Salesforce.com, In Salesforce, you can control access to data at many different levels.

Ex:- (if you are manager of a company, if want to no one access all document means some user can read file, some user Read/write and some manage file permission. you can set permission by using user permissions and access)

Permission sets include settings for :

Control By Profile :

- Tab settings
- Object permissions
- Field permissions
- App permissions
- Apex class access
- IP Ranges
- Login history
- page layouts
- VisualForce page access
- System permissions
- Service providers (only if you've enabled Salesforce as an identity provider)

Control By Roles :

- Record type settings

The below table shows the types of permissions and access settings that are specified in profiles and permission sets :

Permission or Setting Type	In Profiles?	In Permission Sets?
Assigned apps	✓	✓
Tab settings	✓	✓
Record type assignments	✓	✓
Page layout assignments	✓	
Object permissions	✓	✓
Field permissions	✓	✓
User permissions (app and system)	✓	✓
Apex class access	✓	✓
Visualforce page access	✓	✓
Service provider access (if Salesforce is enabled as an identity provider)	✓	✓
Desktop client access	✓	
Login hours	✓	
Login IP ranges	✓	

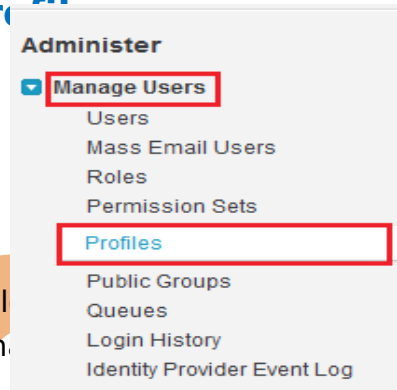
How to set Permission by using Profile

Setup -> Manage Users -> Profile

Click on Profile then you can see new web page on right site you can below, there are you can see many standard profile, select any profile which want to set permission.

Note :- you not be direct set permission on profile first you will create clone profile then you can change. For create clone click on **Clone** link.

For Ex :- (I will select standard profile and click on **Clone** link you can see below.



step 1 :-

Profiles

Help for this Page

All Profiles | Edit | Delete | Create New View

New Profile

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

Action	Profile Name ↑	User License	Custom
<input type="checkbox"/> Edit Del...	Custom: Support Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clo...	Customer Portal Manager Custom	Customer Portal Manager Custom	<input type="checkbox"/>
<input type="checkbox"/> Edit Clo...	Customer Portal Manager Standard	Customer Portal Manager Standard	<input type="checkbox"/>
<input type="checkbox"/> Edit Clo...	Force.com - App Subscription User	Force.com - App Subscription	<input type="checkbox"/>
<input type="checkbox"/> Edit Clo...	Force.com - Free User	Force.com - Free	<input type="checkbox"/>
<input type="checkbox"/> Edit Clo...	Gold Partner User	Gold Partner	<input type="checkbox"/>
<input type="checkbox"/> Edit Clo...	High Volume Customer Portal	High Volume Customer Portal	<input type="checkbox"/>
<input type="checkbox"/> Edit Clo...	Marketing User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clo...	Partner App Subscription	Partner App Subscription	<input type="checkbox"/>
<input type="checkbox"/> Edit Clo...	Read Only	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clo...	Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/> Edit Clo...	Solution Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clo...	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/> Edit Clo...	Standard User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clo...	System Administrator	Salesforce	<input type="checkbox"/>

1-23 of 23 | 0 Selected | << Previous Next >> | Page 1 of 1

These are standard profile

step 2 :-

Give profile name and click on **Save** button.

Clone Profile

[Help for this Page](#) ?

Enter the name of the new profile.

You must select an existing profile to clone from. ! = Required Information

Existing Profile	Standard User
User License	Salesforce
Profile Name	<input type="text" value="Recruiter"/>

step 3 :-

After that you can see New Profile Recruiter, see below .

There is two type for editing profile you can just go to down and try edit profile or click to **Edit** button to edit profile.

Profile
Recruiter

[Help for this Page](#) ?

[« Back to List: Profiles](#)

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \[0\]](#) | [Enabled Apex Class Access \[0\]](#) | [Enabled Visualforce Page Access \[0\]](#)

Profile Detail

Name	Recruiter		
User License	Salesforce	Custom Profile	<input checked="" type="checkbox"/>
Description			
Created By	yogesh sharma, 10/17/2013 12:45 PM		Modified By yogesh sharma, 10/17/2013 12:45 PM

Console Settings

Console Layout [\[Edit\]](#)

After click **Edit** button You can see now all field is available in editable mode you can just check or uncheck check box for set the settings or permissions.

Custom App Setting : Checked or uncheck Radio or Check box for set custom app.

www.bispsolutions.com

www.bisptrainigs.com

www.hyperionguru.com

Custom App Settings			Required Information		
	Visible	Default		Visible	Default
Call Center	<input checked="" type="checkbox"/>	<input type="radio"/>	Recurrent Mangment	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
Community	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales	<input checked="" type="checkbox"/>	<input type="radio"/>
Content	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Chatter	<input checked="" type="checkbox"/>	<input type="radio"/>
IT Manager	<input checked="" type="checkbox"/>	<input type="radio"/>	Sample Console	<input type="checkbox"/>	<input type="radio"/>
Marketing	<input checked="" type="checkbox"/>	<input type="radio"/>	Site.com	<input checked="" type="checkbox"/>	<input type="radio"/>

Tab Setting : In tab setting two profile available Standard Tab Settings, Custom Tab Settings.

In dropdown tree values available

1. Default on
2. Default off
3. Tab Hidden

You can select on requirement in Standard or Custom Settings.

Tab Settings

☐ Overwrite users' personal tab customizations

Standard Tab Settings

Home

Default On

Accounts

Default On

App Launcher

Tab Hidden

Campaigns

Default On

Cases

Default On

Chatter

Default On

Console

Tab Hidden

Contacts

Default On

Content

Default On

Contracts

Default On

Dashboards

Default On

Data.com

Default Off

Documents

Default On

Files

Default On

Forecasts

Tab Hidden

Groups

Default On

Ideas

Default On

Leads

Default On

Libraries

Default On

Opportunities

Default On

People

Default On

Price Books

Default Off

Products

Default On

Profile

Default On

Profile Feed

Default On

Profile Overview

Default On

Reports

Default On

Site.com

Default On

Solutions

Default On

Subscriptions

Default On

Custom Tab Settings

Back Offices

Default On

Departments

Default On

Employee List

Default On

Employees

Default On

Employment websites

Default On

Job Applications

Default On

Positions

Default On

wiki

Default On

Object permissions :

Standard Object Permissions : The permissions defined here control access at the object level.

you can set permission for Standard Object Permission there is you can only check or uncheck check box for give to permission.

Standard Object Permissions

The permissions defined here control access at the object level. Access to individual records within that object type is controlled by the sharing model. Set access levels based on the functional requirements for the profile. For example, create different groups of permissions for individual contributors, managers, and administrators. [How do I choose?](#)

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Accounts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Assets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Campaigns	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cases	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contracts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Documents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ideas	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Leads	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Opportunities	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Price Books	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Products	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Push Topics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Solutions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Custom Object Permissions :

In Custom Object Permission by default all check box unchecked you can checked and give permission.

Custom Object Permissions

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Back Offices	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Books	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Candidates	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Departments	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employees	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Employment websites	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ForTestings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Job Applications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Job Postings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Positions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reviews	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Permission	Description
Read	Users can only view records of this type.
Create	Users can read and create records.
Edit	Users can read and update records.
Delete	Users can read, edit, and delete records
View All	Users can view all records associated with this object, regardless of sharing settings.
Modify All	Users can read, edit, delete, transfer, and approve all records associated with this object,

regardless of sharing settings.

Field-Level Security

you can also give Field-Level Security in user profile in user profile on non-editable page scroll down you can find Field-Level security.

There is available Standard Field Level Security, Custom Field Level Security, In Standard Field Level Security create permission on create account by Salesforce.com. You can change on Custom Field Level Security Click on **View** Link then open new page. For Ex :- I have select Candidate Field. you can see below.

Field-Level Security

Standard Field-Level Security

Account	[View]	Lead	[View]
Asset	[View]	Opportunity	[View]
Campaign	[View]	Opportunity Product	[View]
Campaign Member	[View]	Price Book	[View]
Case	[View]	Product	[View]
Contact	[View]	Social Persona	[View]
Contract	[View]	Solution	[View]
Event	[View]	Task	[View]
Idea	[View]	User	[View]

Custom Field-Level Security

Back Office	[View]	ForTesting	[View]
Book	[View]	Job Application	[View]
Candidate	[View]	Job Posting	[View]
Department	[View]	Postion	[View]
Employee	[View]	Review	[View]
Employment website	[View]		

Step 1 :-

Click on **Edit** button.

Candidate Field-Level Security for profile
Recruiter

[Help for this Page ?](#)

<div><div>Edit</div><div>Back to Profile</div></div>			
Field Name	Field Type	Visible	Read-Only
Candidate Number	Auto Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Created By	Lookup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Email Id	Email	<input checked="" type="checkbox"/>	<input type="checkbox"/>
First Name	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Last Modified By	Lookup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Mobile Number	Phone	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Owner	Lookup	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<div><div>Edit</div><div>Back to Profile</div></div>			

Step 2 :-

There is some check box only not visible editable because these check box are Mandatory Fields.

and some check box is visible this check box Non Mandatory field.

In Non Mandatory Field you can provide permission Read-Only, Visible. you can choose it.

Candidate Field-Level Security for profile

Recruiter

[Help for this Page](#)

<div>Save Cancel</div>			
Field Name	Field Type	Visible	Read-Only
Candidate Number	Auto Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Created By	Lookup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Email Id	Email	<input checked="" type="checkbox"/>	<input type="checkbox"/>
First Name	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Last Modified By	Lookup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Mobile Number	Phone	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Owner	Lookup	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<div>Save Cancel</div>			

Mandatory Fields

Non Mandatory Field

Login Hours :

SalesForce provide to you Login history features, You can set login hours in organization Start or end time .

OR

Select the days and hours that users with this profile are allowed to log in. Note that all times are exact times specific to a time zone. Login hours will be applied at those exact times even for users in different time zones.

How to Set Login hours :

Setup -> Mange users -> Profile Select profile name (Ex:- Recruiter)(which want do you need).

After then come to down on page there is you can find **Login hours**. see below

Step 1 :-

Login Hours

Edit

Login Hours Help ?

No login hours specified

After that click on **Edit** button. then you can see new page below.

Step 2 :-

In this page you can set Start or End time by day, After that select login hours click on **Save** button.

Login Hours

Help for this Page ?

Select the days and hours that users with this profile are allowed to log in. Note that all times are exact times specific to a time zone. Login hours will be applied at those exact times even for users in different time zones.

Save

Cancel

All times are in (GMT-07:00) Pacific Daylight Time (America/Los_Angeles)

Day	Start Time	End Time	
Sunday	8:00 AM	5:00 AM	Clear times
Monday	8:00 AM	5:00 PM	Clear times
Tuesday	8:00 AM	5:00 PM	Clear times
Wednesday	8:00 AM	5:00 PM	Clear times
Thursday	8:00 AM	5:00 PM	Clear times
Friday	8:00 AM	5:00 PM	Clear times
Saturday	8:00 AM	5:00 PM	Clear times
Clear all times			

Save

Cancel

After click on save button you can see your login hours detail on profile page see below.

There is you can Edit this login hours and also Delete this login hours.

Login Hours Edit Delete Login Hours Help ?		
Day	Start Time	End Time
Sunday	8:30 PM IST	5:30 AM IST
Monday	8:30 PM IST	5:30 AM IST
Tuesday	8:30 PM IST	5:30 AM IST
Wednesday	8:30 PM IST	5:30 AM IST
Thursday	8:30 PM IST	5:30 AM IST
Friday	8:30 PM IST	5:30 AM IST
Saturday	8:30 PM IST	5:30 AM IST

Login IP Ranges

SalesForce gives to you Login IP Ranges option, Enter the range of valid IP addresses from which users with this profile can log in.

How to Set Login hours :

Setup -> Mange users -> Profile Select profile name (Ex:- Recruiter)(which want do you need).

After then come to down on page there is you can find **Login IP Ranges** . see below

Step 1 :-

Click on **New** button for create Login IP Ranges.

Login IP Ranges	New	Login IP Ranges Help ?
No login IP ranges specified. Users from any IP address are allowed to log in.		

Step 2 :-

There is you can see two fields, Start IP Address and End IP Address, You can give IP address, which IP address allow to user for login.

Note :-

For Single IP Address :

If you want to set single IP address, give this type.

Start IP Address 122.164.224.48	End IP Address 122.164.224.48
--	--------------------------------------

For One to More Range IP Address :

If you want to Set One to More Range IP address, give this type

Start IP Address 122.164.224.48	End IP Address 122.164.224.59
--	--------------------------------------

Login IP Ranges

[Help for this Page](#) ?

Enter the range of valid IP addresses from which users with this profile can log in.

Save

Cancel

Please specify IP range ! = Required Information

Start IP Address 122.164.224.48

End IP Address 122.164.224.48

Save

Cancel

After click save button then you can see your IP address on profile setting page, see below.

Login IP Ranges New Login IP Ranges Help ?		
Action	IP Start Address	IP End Address
Edit Del	122.164.224.40	122.164.224.40

Enabled Apex Class Access

Setup -> **Mange users** -> **Profile** Select profile name (Ex:- Recruiter)(which want do you need).

After then come to down on page there is you can find **Enable Apex class Access** . see below

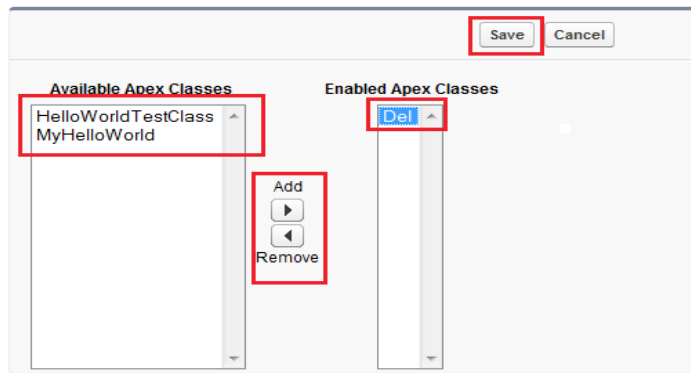
Step 1 :- Click on **Edit** button.

Enabled Apex Class Access Edit Enabled Apex Class Access Help ?

No Apex Classes enabled

Step 2 :- Select Available Apex Classes then click on **Add** button after that click on **Save** button.

Enable Apex Class Access

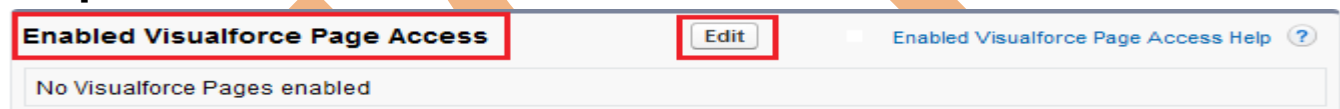


Enabled VisualForce Page Access

Setup -> Mange users -> Profile Select profile name (Ex:- Recruiter)(which want do you need).

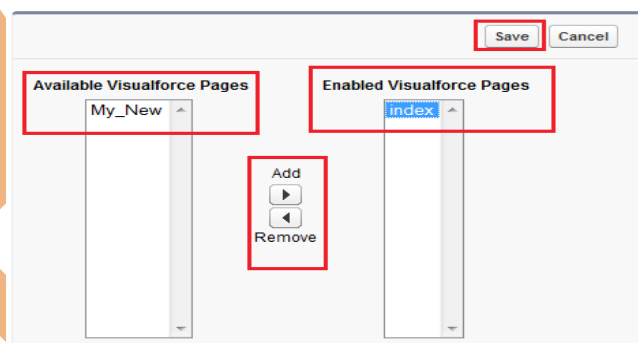
After then come to down on page there is you can find **Enable VisualForce page Access** . see below

Step 1 :- Click on **Edit** button.



Step 2 :- Select Available VisualForce Pages then click on **Add** button after that click on **Save** button

Enable Visualforce Page Access



Roles

By using Salesforce.com you can Set in your organization Roles. Roles are one of the ways you can control access to records. Set up your Role Hierarchy to control how your organization reports on and accesses data.



How to Set Rules

Click **Setup** -> **Manage user** -> **Rules** then click on **Set Up Rules** button . see below.

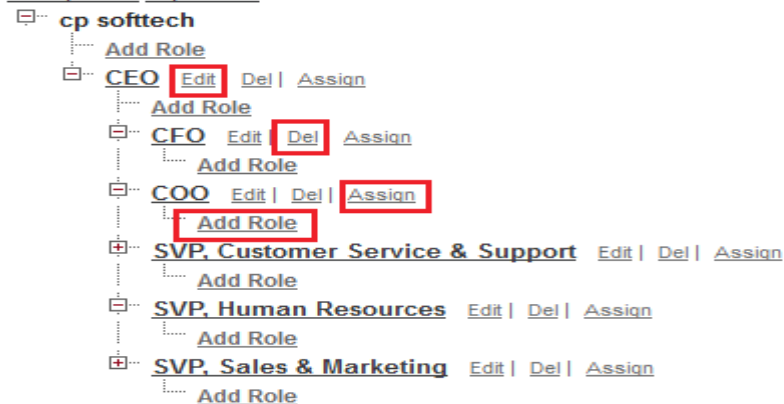
There you can see that your organization role hierarchy , here you can Edit role , Delete Role and Add Role.

Creating the Role Hierarchy

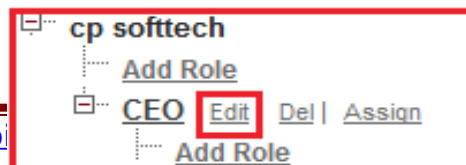
You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

[Collapse All](#) [Expand All](#)



Edit Role :



Step 1 :-

Click on Edit link for Editing role.

Step 2 :-

if you need to change field's name you can do it. after that click on **Save** button.

|

Role Edit Help for this Page ?

CEO

Label

CEO

Role Name

CEO

i

This role reports to

cp softtech

🔍

Role Name as displayed on reports

CEO

All field's editable if you want to change you can do it.

Save

Save & New

Cancel

Add Role :

Step 1 :-

Click on Add Role link for Editing role.

Step 2 :-

Fill all fields Label, Role Name, Report to then click on **Save** button.

Role Edit Help for this Page ?

New Role

Label

Manager

Role Name

Manager

i

This role reports to

CEO

🔍

Role Name as displayed on reports

Manager

Save

Save & New

Cancel

Collapse All Expand All

cp softtech

Add Role

CEO Edit Del Assign

Add Role

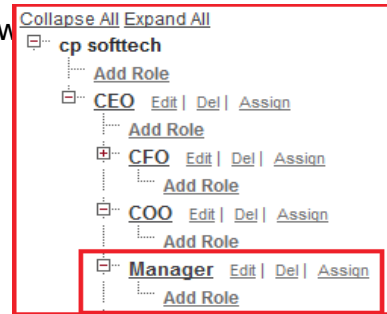
CFO Edit Del Assign

Add Role

COO Edit Del Assign

Add Role

After that you can see the Role Hierarchy list Manager w

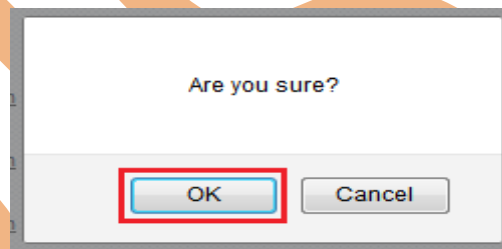


Delete Role :-

By using **Delete** link you can delete Role in hierarchy.

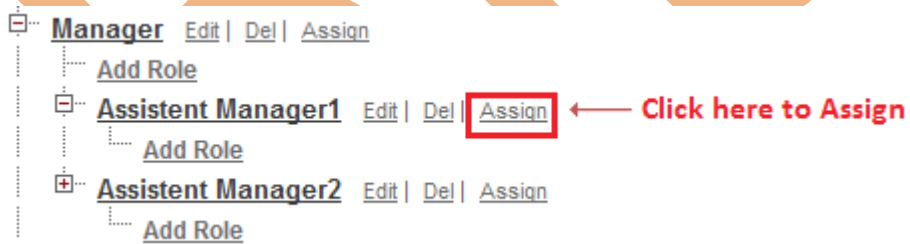


Click on Del link button you can get conformation Message click ok button you can delete Role.



Assign Role :-

First you can click on **Assign** link .



Then select user name which on you assign, after select user name click on **Add** button then click on Save button. You can also Find user in available users.

Assistant Manager1

To assign other users to this role:

- Make a selection from the drop-down list to show available users.
- Choose a user on the left and add them to the **Selected Users** list.

Removing a user from the **Selected Users** list deletes the role assignment for that user.

Available Users
Search:
All Unassigned
for: Find

yogesh sharma

Add
▶
◀
Remove

Selected Users for Assistant Manager1
--None--

Save Cancel

cp softtech
├── CEO
├── CFO
├── COO
├── Manager
│ ├── Assistant Manager1
│ ├── Assistant Manager2
├── SVP, Customer Service & Support
├── SVP, Human Resources
└── SVP, Sales & Marketing

To Create, view and manage the users in your organization. The user list shows all the users in your organization, and Salesforce Customer Portal.

Setup -> Manage user -> Us

There Is Four Option :

1. Create one user.
2. Create multiple users.
3. Reset passwords for selected
4. Edit a user.

New User

Reset Password(s)

Add Multiple Users

Action	Full Name ↑	Alias	Username	Last Login	Role	Active	Profile	Manager
Edit	Chatter Expert	Chatter	chattv00d90000000oc@eam.in6mzuphkt@chattersalesforce.com			✓	Chatter Free User	
Edit	sharma, voqesh	ysnar	voqesh@lvs.com	10/19/2013 12:55 PM		✓	System Administrator	

New User

Reset Password(s)

Add Multiple Users

1. Create one user

You can create new user for you organization. click on **New User** button. see below.

From **Setup** -> click **Manage Users** -> **Users**. Click **New User** button.

Fill all the fields, you can give any user name, select role, select user license, and select profile. Select the other options and enter the remaining user information as needed and click on **Save** button.

In this mail id come to confirmation mail by SalesForce check your mail id.





[Help for this Page](#)

2. Reset Password for selected users

New User

Reset Password(s)

Add Multiple Users

Action	Full Name ↑	Alias	Username	Last Login	Role	Active	Profile	Manager
 Edit	Chatter Expert	Chatter	chattv00d900000000ox9eam.ih6mvzuphxt@chatter.salesforce.com				Chatter Free User	
 Edit	sharma_vogesh	yshar	vogesh@lvs.com	10/19/2013 12:55 PM			System Administrator	

New User

Reset Password(s)

Add Multiple Users

3. Create multiple users

The Add Multiple Users Salesforce provides a way to quickly add users to your organization. Depending on the number of available licenses, you can create up to 10 users. With this page this depend on license , you specify the minimum information needed.

Users

Add Multiple Users

Number of available Chatter Free user licenses: 4999
Number of available Force.com - Free user licenses: 2
Number of available Salesforce Platform user licenses: 3
Number of available Chatter External user licenses: 500
Number of available Force.com - App Subscription user licenses: 2
Number of available Partner App Subscription user licenses: 2

Add Users [Save] [Cancel]

User License | Salesforce Platform

New Users [Red icon] = Required Information

New User #1
First Name | vikas
Last Name | Kulkarni
Email (User Name) | vik@gmail.com
Profile | --None--
Role | Assistent Manager1

New User #2
First Name | Jitendra
Last Name | Yadav
Email (User Name) | jitendra@gmail.com
Profile | --None--
Role | Assistent Manager2

New User #3
First Name | cp
Last Name | sharma
Email (User Name) | cps@gmail.com
Profile | --None--
Role | Manager

☒ Generate passwords and notify user via email

[Save] [Cancel]

4. Edit a user

Select User and click on edit link button. for Update information fill update Field and click on save Button .

[New User] [Reset Password(s)] [Add Multiple Users]

Action	Full Name ↑	Alias	Username	Last Login	Role	Active	Profile	Manager
[Edit]	Chatter Expert	Chatter	chattv00d9000000000x9eam.ih6mvzuphixt@chatter.salesforce.com			✓	Chatter Free User	
[Edit]	sharma, voqesh	yshar	voqesh@lvs.com	10/19/2013 3:14 PM		✓	System Administrator	
[Edit]	vadav, Vikram	wada	vp.01012013@gmail.com	10/19/2013 3:13 PM	Manager	✓	Recruiter	

[New User] [Reset Password(s)] [Add Multiple Users]

Mass Email Users

You can send a mass email(bulk email) message to a available list that consists of contacts, leads, person accounts, or users you can view in Salesforce.com .

User permission Needed	
To send mass emails to contacts, person accounts, leads	Mass Email
To send mass emails to use	Mass Email and Manage Users
To send mass emails and log them in the active history related	Mass Email And Edit Tasks

How To Send Mass Email :

From **Setup** -> click **Manage Users** -> **Mass Email**



Step 1 :-

1. click on Dropdown and select user which want send
2. After select user click on **Go** button.
3. Checked check box for select user list for sending Mass email.
4. Click on **Next** button.

Step 1. Specify the recipients to include Step 1 of 4

[Next](#) [Cancel](#)

Select a view below that contains the recipients to be included in this email.

View: Active Users Go [Edit](#) [Create New View](#)

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](#)

Available 3 in view

<input type="checkbox"/>	Full Name ↑	Alias	Username	Last Login	Role	Active	Profile
<input type="checkbox"/>	Chatter Expert	Chatter	chatty00d9000000000x9eam.i6mvzuphxt@chatter.salesforce.com			✓	Chatter Free User
<input checked="" type="checkbox"/>	sharma, voqesh	yshar	voqesh@lvs.com	10/19/2013 3:14 PM		✓	System Administrator
<input checked="" type="checkbox"/>	yadav Vikram	wvada	vp.01012013@gmail.com	10/19/2013 3:13 PM	Manager	✓	Recruiter

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](#)

Next [Cancel](#)

Step 2 :- Select Email Format Template and click on **Next** button. Click on Preview link you can template preview.

Template Selection

Step 2. Select an email template Step 2 of 4

[Previous](#) [Next](#) [Cancel](#)

Please select an email template to use. To create a new template, you must exit this mass email process and create the new template in your personal setup section.

Folder: Unfiled Public Email Templates

Preview	Name	Type	Description
Preview	<input checked="" type="radio"/> Marketing: Product Inquiry Response	Text	Standard email response to website product inquiries
Preview	<input type="radio"/> Sales: New Customer Email	Text	Email to new customers
Preview	<input type="radio"/> SUPPORT: Self-Service New Comment Notification (SAMPLE)	Text	Sample email template that can be sent to your Self-Service customers to notify them a public comment has been added to their case.
Preview	<input type="radio"/> SUPPORT: Self-Service New User Login Information (SAMPLE)	Text	Notification of login and password to new Self-Service user
Preview	<input type="radio"/> SUPPORT: Self-Service Reset Password (SAMPLE)	Text	Notification of new password when Self-Service password is reset
Preview	<input type="radio"/> Support: Case Assignment Notification	Text	Notification to rep when case is auto-assigned
Preview	<input type="radio"/> Support: Case Created (Phone Inquiries)	Text	Notification to customer about case created through phone call
Preview	<input type="radio"/> Support: Case Created (Web Inquiries)	Text	Notification to customer about case created online
Preview	<input type="radio"/> Support: Case Response	Text	Standardized template for responses to customer inquiries
Preview	<input type="radio"/> Support: Escalated Case Notification	Text	Notification email on case escalation
Preview	<input type="radio"/> Support: Escalated Case Reassignment	Text	Case reassignment email to new case owner on escalation
Preview	<input type="radio"/> Support: Self-Service New Login and Password	Text	Notification of login and password to new self-service user
Preview	<input type="radio"/> Support: Self-Service Reset Password	Text	Notification of new password when self-service password is reset

[Previous](#) [Next](#) [Cancel](#)

Step 3 :-

Give Email Name, There is two type Delivery option available

(I) Send Now : If choose this option and click to **send** button, mail send Immediately

(II) Schedule for delivery on : Select this option you can schedule your mail which time or date you want to send mail.

Step 3. Review and confirm Step 3 of 4

[Previous](#) [Send](#) [Cancel](#)

You currently have 2 recipient(s) selected to receive this email.

Processing Options ! = Required Information

BCC me on one message ☒

Use my signature ☒

Mass Email Name Password Rest

Delivery Options

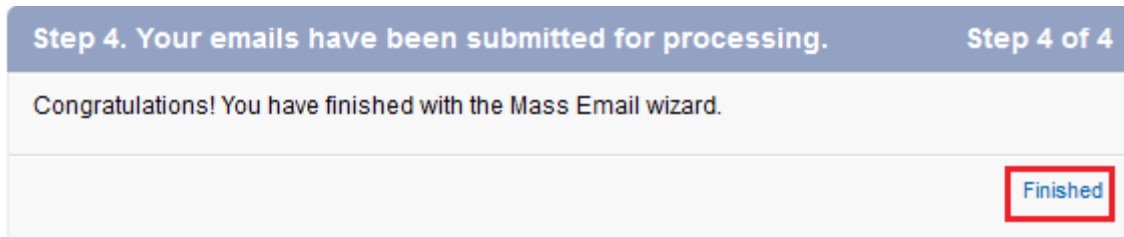
☒ Send now

☐ Schedule for delivery on Time Zone

[Previous](#) [Send](#) [Cancel](#)

Step 4 :-

After that show new page, this page show email successfully submitted for processing , click on Finished **link** button.



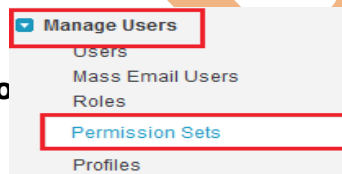
Permission Sets in Salesforce

Permission Sets are a group of settings and permissions that extend what a user can do beyond what their profile allows. The settings and permissions in permission sets are also found in profiles, but permission sets extend users' functional access without changing their profiles.

It is also very easy to add or remove a permission set for a given user.

How to set permission

Setup -> User Manager -> Permission



Step 1 :-

Click on **New** button, see below

Permission Sets

[Help for this Page](#) ?



Step 2:-

Give your permission set a label and API Name. Give your permission set a description so you know exactly what the permission set gives access to. Then choose the correct type of license you're creating the permission set for Then Click on **Save** button.

SaveCancel

Enter permission set information

Label

SpacialPermission

API Name

Spacial_Permission

i

Description

Give one user special permission.

...

Select the type of users who will use this permission set

Who will use this permission set? If you plan to assign this permission set to multiple users with different licenses, choose '--None--'. If only users with one type of license will use this permission set, choose the same license that's associated with them.

User License

--None--

i

SaveCancel

Note: If you think to assign this permission set to multiple users with different licenses, choose '--None--'.
If assign only one users license will use this permission set, choose the same license that's associated with them.

step 3 :-

Permission Set

Spacial Permission

Help for this Page

Find Settings...

CloneDeleteEdit Properties

Permission Set Overview

Assigned Users

Description	Give one user special permission.	API Name	Spacial_Permission
User License		Namespace Prefix	
Created By	yogesh sharma, 10/21/2013 9:38 AM	Last Modified By	yogesh sharma, 10/21/2013 9:38 AM

Apps

Settings that apply to Salesforce apps, such as Sales, and custom apps built on Force.com

Learn More

Assigned Apps

Settings that specify which apps are visible in the app menu

Assigned Connected Apps

Settings that specify which connected apps are visible in the app menu

Object Settings

Permissions to access objects and fields, and settings such as tab availability

App Permissions

Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access

Permissions to execute Apex classes

Visualforce Page Access

Permissions to execute Visualforce pages

System

Settings that apply across all apps, such as record and user management

Learn More

System Permissions

Permissions to perform actions that apply across apps, such as "Modify All Data"

Service Providers

Permissions that let users switch to other websites using single sign-on.

www.bispsolutions.com

www.bisptrainigs.com

www.hyperionguru.com

Page 23

After saved the permission set name and description, then start adding permissions. Permissions are divided by app permissions and system permissions. You can give permission for assigned apps, object settings, app permissions, apex class access, VisualForce page access and system permissions. Depending on what license type you chose for the permission set.

I will select Object setting.

Step 4 :-

Select object name according to your plan. (ex:- Candidates).

Permission Set
Spatial Permission

Find Settings... Clone Delete Edit Properties

Permission Set Overview > Object Settings

Object Settings

Object Name	Object Permissions	Total Fields	Tab Settings
Accounts	No Access	31	--
Assets	No Access	18	--
Back Offices	No Access	8	--
Books	No Access	5	--
Campaign Members	--	29	--
Campaigns	No Access	37	--
Candidates	No Access	7	--
Cases	No Access	33	--
Contacts	No Access	29	--

Step 5 :-

Click on Edit button, then open new page in this page you can set permission see below.

Permission Set
Spatial Permission

Find Settings... Clone Delete Edit Properties

Permission Set Overview > Object Settings > **Candidates**

Candidates Edit

Object Permissions

Permission Name	Enabled
Read	<input type="checkbox"/>
Create	<input type="checkbox"/>
Edit	<input type="checkbox"/>
Delete	<input type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input type="checkbox"/>

Field Permissions

Field Name	Read	Edit
Candidate Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Created By	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Email Id	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
First Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Last Modified By	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Mobile Number	<input type="checkbox"/>	<input type="checkbox"/>
Owner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Permission Set
Spatial Permission

Find Settings... Clone Delete Edit Properties

Permission Set Overview > Object Settings > **Candidates** Save Cancel

Candidates

Object Permissions

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input checked="" type="checkbox"/>
View All	<input checked="" type="checkbox"/>
Modify All	<input type="checkbox"/>

Field Permissions

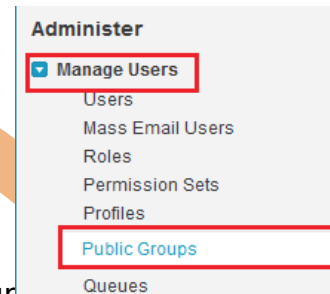
Field Name	Read	Edit
Candidate Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Created By	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Email Id	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
First Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Last Modified By	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Mobile Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Owner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Public Groups

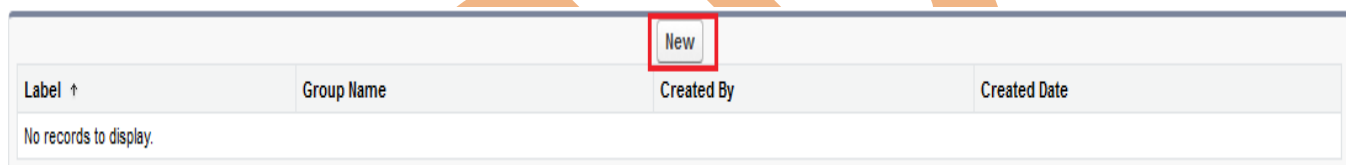
A public group is a set of users. It can contain individual users, other groups, the users in a particular role or territory, or the users in a role or territory plus all of the users below that role or territory in the hierarchy.

How to set permission

Setup -> User Manager -> Public Groups



Step 1 :- Click on New button. for create Public group..



Step 2 :-

A screenshot of the 'New Public Group' form in a software application. The form has a 'Group Information' section with 'Label' and 'Group Name' fields, both containing 'Special User' and 'Special_User' respectively. A 'Grant Access Using Hierarchies' checkbox is checked. Below this is a 'Search' dropdown menu set to 'Roles' and a 'Find' button. There are two lists: 'Available Members' and 'Selected Members'. The 'Available Members' list contains various roles like 'Role: Assistant Manager1', 'Role: Assistant Manager2', etc. The 'Selected Members' list contains 'Role: CEO', 'User: Vikram yadav', and 'Role and Subordinates: Assistant Manager2'. An 'Add' button is highlighted with a red box between the two lists. At the bottom of the form, there are 'Save' and 'Cancel' buttons, with the 'Save' button highlighted with a red box.

Give your New public group label and Group Name. by using search option select multiple member click to **Add** button for adding members. then click to **Save** button.

Queues

Queues help your teams manage lead, service contracts, cases, and custom objects. When records are placed in a queue manually or through an automatic case or lead assignment rule, records remain there until they're assigned to a user or taken by one of the queue members. Any queue member or users above them in the role hierarchy can take ownership of records in a queue.

Create Queues :

Setup -> User Managers -> Queues

Step 1 :-

Click on **New** button.



Label ↑	Queue Name	Queue Email	Supported Objects	Modified By	Last Modified Date
No records to display.					

Step 2 :-

- Enter the Label and Queue Name. Queue Name is a unique name used by the API and managed packages, and can only contain alphanumeric characters and underscores.
- Choose email notification settings for the queue.
- Choose the objects available to the queue.
- Choose queue members.
- After that click **Save** button.

New Queue

[Help for this Page](#) ?

Queue Edit Save Cancel

Queue Name and Email Address ! = Required Information

Enter the name of the queue and the email address to use when sending notifications (for example, when a case has been put in the queue). The email address can be for an individual or a distribution list. When an object is assigned to a queue, only the queue members will be notified.

Label

Queue Name i

Queue Email

Send Email to Members ☒

Supported Objects

Select the objects you want to assign to this queue. Individual records for those objects can then be owned by this queue.

Available Objects

Back Office
Book
Candidate
Case
Department
Employee
Employment website
ForTesting
Job Application
Knowledge Article Version
Lead
Postion

Add
Remove

Selected Objects

--None--

Queue Members

To add members to this queue, select a type of member, then choose the group, role, or user from the "Available Members" and move them to the "Selected Members." If the sharing model for all objects in the Queue is Public Read/Write/Transfer, you do not need to assign users to the queue, as all users already have access to the records for those objects.

Search: Users for: Find

Available Members

User: Vikram yadav
User: yogesh sharma

Add
Remove

Selected Members

--None--

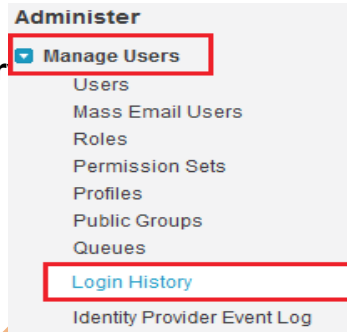
Save Cancel

Login History

By using Login History you can see Login history of user. you can some detail Username, Login Time, Source IP, Login IP, Login Type, Status, Browser, Platform, Application, Client Version, API type, API Version, Login URL. And you can also take last 6 month login history back in .CSV File or .GZIP File. click on **download** button.

How to Get Login History

Setup -> Manage Users -> Login history



Login History

[Help for this Page](#)

Still Using IE6?
Salesforce is phasing out support for IE6. Use the download options provided to find out what browsers are being used in your organization.

Download Options

File Type ⓘ <input checked="" type="radio"/> CSV File <input type="radio"/> GZIP File	File Contents ⓘ All Logins	Download Now
--	--------------------------------------	---------------------

This page only allows you to filter and display the last 20,000 login records. If you need more records, download the last 6 months as a CSV, or access the LoginHistory via the API.

View: All Create New View

<Previous Page | Next Page>

Username	Login Time ↓	Source IP	Login Type	Status	Browser	Platform	Application	Client Version	API Type	API Version	Login URL
yogesh@lvs.com	10/21/2013 9:10:40 AM IST	122.168.241.45	Application	Success	Firefox 25	Windows 7	Browser	N/A	N/A	N/A	login.salesforce.com
yogesh@lvs.com	10/19/2013 3:14:41 PM IST	122.168.225.144	Application	Success	Firefox 25	Windows 7	Browser	N/A	N/A	N/A	login.salesforce.com
yp.01012013@gmail.com	10/19/2013 3:13:03 PM IST	122.168.225.144	Application	Success	Chrome 30	Windows 7	Browser	N/A	N/A	N/A	login.salesforce.com
yogesh@lvs.com	10/19/2013 12:55:03 PM IST	122.168.225.144	Application	Success	Firefox 25	Windows 7	Browser	N/A	N/A	N/A	login.salesforce.com
yp.01012013@gmail.com	10/19/2013 12:54:54 PM IST	122.168.225.144	Application	Success	Chrome 30	Windows 7	Browser	N/A	N/A	N/A	login.salesforce.com

There is you can see login history, select File Type and click on **Download** button and download last 6 month login history. and also check history on this page.