



# **Getting Started with SalesForce CRM Administration**

## **Hands-on Guide for Manage Users**

### **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 user, group administration, predefined roles, backing up and restore users/groups and migration users/groups. **Join our professional training program and learn from experts.**

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# Manage user profiles in Salesforce CRM

SalesForce users in your organization access to Salesforce CRM but require a username, an e-mail address, a password, and a profile along with an active user license. your organization has purchased depending on features, have you user options such as Service Cloud, Sales, and Mobile, which give particular users the ability to access other features that are only available with a specific user license. A user can be assigned to one or more of these options.

## How To Go User :

**Setup > Manage User > User**

All Users

[Help for this Page](#) ?

View:  [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

Action	Full Name ↑	Alias	Username	Last Login	Role	Active	Profile	Manager
<input type="checkbox"/> <a href="#">Edit</a>	Chatter Expert	Chatter	chattv.00d9000000000009eam.ih6mvzuphxt@chatter.salesforce.com			✓	Chatter Free User	
<input type="checkbox"/> <a href="#">Edit</a>	sharma_voqesh	voqi	voqesh@lvs.com	12/18/2013 8:34 AM		✓	System Administrator	yadav_Vikram
<input type="checkbox"/> <a href="#">Edit</a>	yadav_Vikram	wada	yp.01012013@gmail.com	12/14/2013 10:42 AM	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

## Creating new users :

following steps for creating a new user :

- Click on New User button.
- Enter fields in the General Information and Locale Settings.
- Check the box Generate new password and notify user immediately.
- Click on Save button for save the new user details.

## To create new user account :

**Setup > Manage Users > User**, Click on **New user** button.

Action	Full Name ↑	Alias	Username	Last Login	Role	Active	Profile	Manager
<input type="checkbox"/> <a href="#">Edit</a>	Chatter Expert	Chatter	chattv.00d9000000000009eam.ih6mvzuphxt@chatter.salesforce.com			✓	Chatter Free User	
<input type="checkbox"/> <a href="#">Edit</a>	sharma_voqesh	voqi	voqesh@lvs.com	12/18/2013 8:34 AM		✓	System Administrator	yadav_Vikram
<input type="checkbox"/> <a href="#">Edit</a>	yadav_Vikram	wada	yp.01012013@gmail.com	12/14/2013 10:42 AM	Manager	✓	Recruiter	

We look top section of the New User page, This page is General Information section:

## New User

[Help for this Page](#) 

**User Edit** Save Save & New Cancel

**General Information** ! = Required Information

First Name	<input type="text"/>	Role	<input type="text" value="&lt;None Specified&gt;"/>
Last Name	<input type="text"/>	User License	<input type="text" value="Chatter Free"/>
Alias	<input type="text"/>	Profile	<input type="text" value="--None--"/>
Email	<input type="text"/>	Active	<input checked="" type="checkbox"/>
Username	<input type="text"/>	Marketing User	<input type="checkbox"/>
Nickname	<input type="text"/>	Offline User	<input type="checkbox"/>
Title	<input type="text"/>	Knowledge User	<input type="checkbox"/>
Company	<input type="text"/>	Force.com Flow User	<input type="checkbox"/>
Department	<input type="text"/>	Service Cloud User	<input type="checkbox"/>
Division	<input type="text"/>	Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		Salesforce Classic User	<input type="checkbox"/>
		Mobile Configuration	<input type="text"/>
		Data.com User Type	<input type="text" value="--None--"/>
		Data.com Monthly Addition Limit	<input type="text" value="--None--"/>
		Accessibility Mode	<input type="checkbox"/>
		Color-Blind Palette on Charts	<input type="checkbox"/>
		Force.com Quick Access Menu	<input checked="" type="checkbox"/>
		Salesforce CRM Content User	<input type="checkbox"/>
		Receive Salesforce CRM Content Email Alerts	<input type="checkbox"/>
		Receive Salesforce CRM Content Email Alerts	<input type="checkbox"/>
		Receive Salesforce CRM Content Alerts as Daily Digest	<input type="checkbox"/>
		Allow Forecasting	<input type="checkbox"/>
		Call Center	<input type="text"/>
		Phone	<input type="text"/>
		Extension	<input type="text"/>
		Fax	<input type="text"/>
		Mobile	<input type="text"/>
		Email Encoding	<input type="text" value="General US &amp; Western Europe (ISO-8859-1, ISO-LATIN-1)"/>
		Employee Number	<input type="text"/>

Enter the user's first name, last name, alias, e-mail address, User Name, Nickname.  
Select User license, Profile in dropdown list.  
checked Active Check box.

You can enable additional features by checked check box :

- Marketing User

- Offline User
- Knowledge User
- Force.com Flow User
- Service Cloud User
- Site.com Publisher User
- Mobile User [if you purchase this license].
- Salesforce CRM Content User

Select Email Encoding option in dropdown list.

**At the bottom of the page, there are many sections :**

Mailing Address, Single sign on information, Locale Settings, Approver Settings. you can see below.

The screenshot shows the following sections in the user settings page:

- Mailing Address:** Includes input fields for Street, City, State/Province, Zip/Postal Code, and Country.
- Single Sign On Information:** Includes a Federation ID input field.
- Locale Settings:** Includes dropdown menus for Time Zone (set to GMT+05:30 India Standard Time), Locale (set to English), and Language (set to English).
- Approver Settings:** Includes input fields for Delegated Approver and Manager, and a dropdown for Receive Approval Request Emails (set to Only if I am an approver).
- salesforce.com Newsletter Settings:** Includes checkboxes for:
  - Receive the salesforce.com newsletter (unchecked)
  - Receive the salesforce.com administrator newsletter (checked)
  - Generate new password and notify user immediately (checked)

At the bottom, there are three buttons: **Save**, **Save & New**, and **Cancel**. A red arrow points to the **Save** button.

After Saving this page, you can Edit this page following read-only fields and related lists can be seen:

Action	Full Name ↑	Alias	Username	Last Login	Role	Active	Profile	Manager
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chattv00d9000000000x9eam.inh6mvzuphxt@chatter.salesforce.com			<input checked="" type="checkbox"/>	Chatter Free User	
<input type="checkbox"/> Edit	sharma, vogesh	vogesh	vogesh@lvs.com	12/18/2013 8:34 AM		<input checked="" type="checkbox"/>	System Administrator	yadav, Vikram
<input type="checkbox"/> Edit	yadav, Vikram	yadav	vp.01012013@gmail.com	12/14/2013 10:42 AM	Manager	<input checked="" type="checkbox"/>	Recruiter	

## 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** = 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

## Delegation of user management :

Delegation of user management allows you to focus on tasks other than managing users for every department or structure that your company has within Salesforce. This provides further benefits for

global organizations that encounter time zone and cultural differences as it allows a user based in that region with local knowledge to create the users, which saves time and results in a better user experience.

## Creating profile Manage Users permission :

Allows a much greater range of system administration functions to be carried out by the user.

Manage Users permission allows the user to perform the following :

- Expire all passwords.
- Clone, edit, or delete profiles.
- Edit or delete sharing settings.
- Edit user login hours.

## Delegated administration :

In Salesforce.com delegated administration is a more secure method for providing delegated user management access as it allows you to assign limited administrative privileges to the selected non-administrator users in your organization.

### How to Create Administration Delegated :

**Setup > Administration Setup > Security Controls > Delegate Administration,** Click on **New** button.

The screenshot displays the Salesforce Admin console interface. On the left, the navigation menu is visible, with 'Administer' selected, and 'Security Controls' and 'Delegated Administration' highlighted. The main content area shows the 'Edit Delegated Group' page for a 'New Delegated Group'. The form includes a 'Delegated Group Name' input field, an 'Enable Group for Login Access' checkbox, and 'Save' and 'Cancel' buttons. A red arrow points to the 'Save' button.

We look at the existing group that has been named Admindelegate :

Delegated Group Detail

Edit Delete

Delegated Group Name Addmindelegate

Enable Group for Login Access

Created By yqesh sharma, 12/18/2013 12:32 PM

Modified By yqesh sharma, 12/18/2013 12:35 PM

Delegated Administrators

i

Add

Click here add delegated administration permission

Delegated Administrators Help ?

Action	Users	Modified By
<a href="#">Remove</a>	yqesh sharma	yqesh sharma, 12/18/2013 12:33 PM

User Administration

i

Add

User Administration add roles

User Administration Help ?

Action	Roles and Subordinates	Modified By
<a href="#">Remove</a>	CEO	yqesh sharma, 12/18/2013 12:33 PM

Assignable Profiles

i

Add

add profiles

Assignable Profiles Help ?

Action	Profiles	Modified By
<a href="#">Remove</a>	Chatter Free User	yqesh sharma, 12/18/2013 12:35 PM

Custom Object Administration

i

Add

Custom Object Administration Help ?

No custom objects specified.

## Deactivating users :

In Salesforce.com You cannot remove users from the Organization, but you can deactivate user profile.

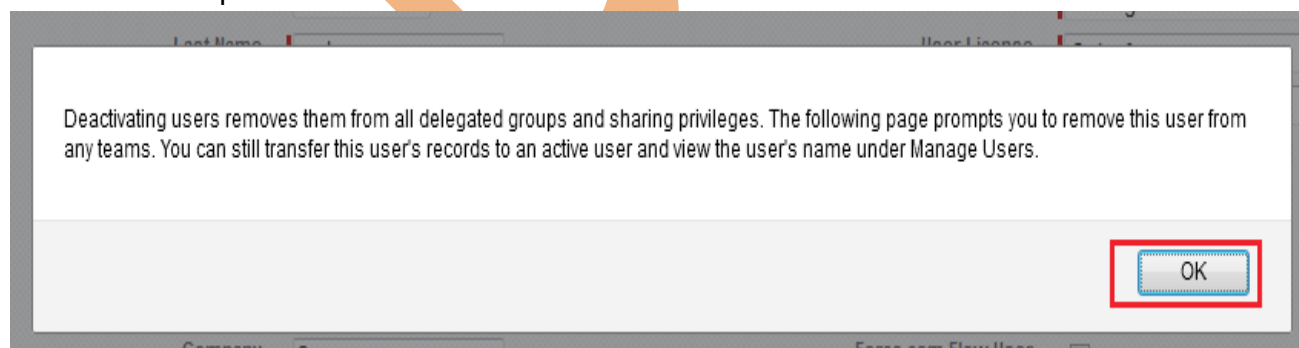
### For deactivate users :

**Setup > Administration Setup > Manage Users > Users**, Click on **Edit** button.

Disable the Active checkbox, and then click on Save.

you can see below.

When you Uncheck Active checkbox you get one popup message. click on ok button and Save this profile.





## Password management :

You have the following two options for resetting passwords:

- Forgot passwords
- Expiring passwords

## Troubleshoot user login issues

Salesforce.com provide to easy login to the service and to change your password, but you may many time face issues of login in Salesforce.com, if you forget your username or password, or if you're locked out for too many attempts to log on with the wrong credentials. The password policies set up by your administrator determine how many failed logins are allowed, how long lockout periods last, and password requirements such as minimum length.

We recommend changing your password time to time protect the privacy of your data. If your administrator specifies that user passwords expire on a periodic basis, you'll be prompted to change your password at the end of each period.

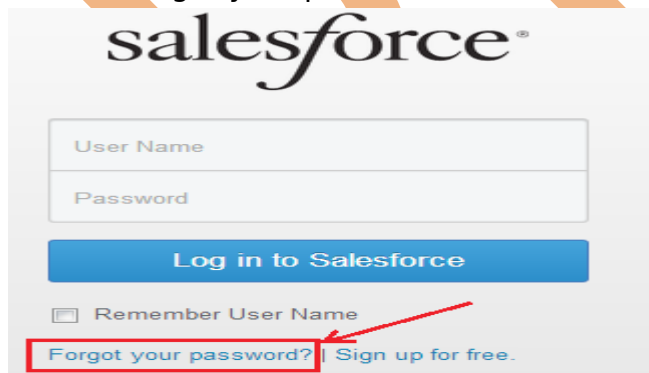
- Forgot your password?
- Locked out? Wait until the lockout period expires and try again, or contact your administrator.
- Password expired? We'll prompt you to change your password.

## Forgot your password :

1. Open Salesforce.com web site then click on login button. and all so you can try direct link

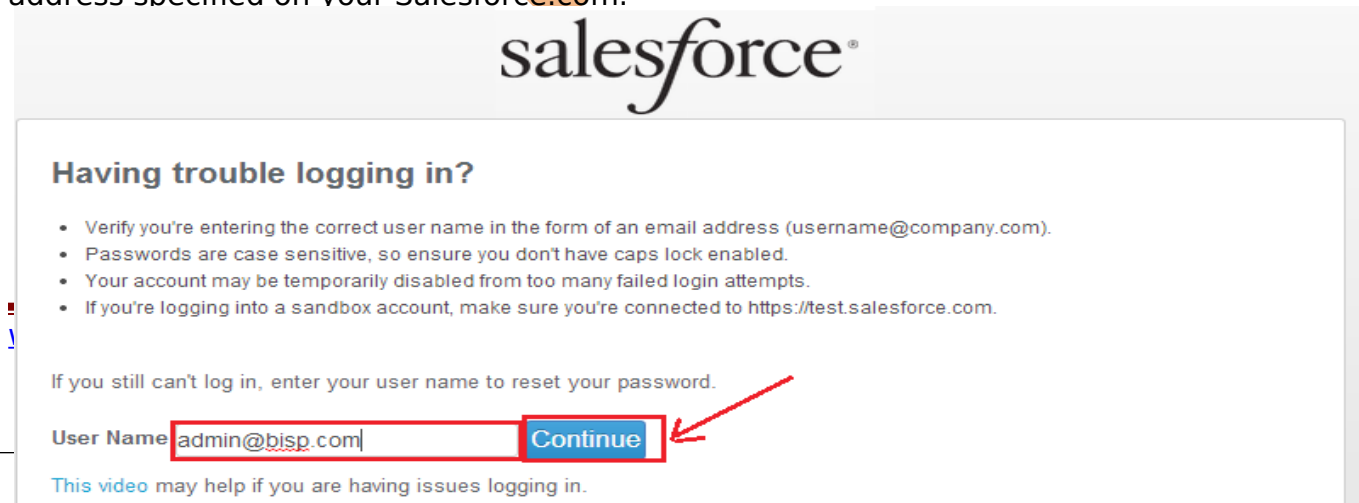
<https://login.salesforce.com>

2. Click Forgot your password? link.



The screenshot shows the Salesforce login interface. At the top is the 'salesforce' logo. Below it are two input fields: 'User Name' and 'Password'. A blue button labeled 'Log in to Salesforce' is positioned below the fields. Underneath the button is a checkbox labeled 'Remember User Name'. At the bottom of the login form, there are two links: 'Forgot your password?' and 'Sign up for free.'. The 'Forgot your password?' link is enclosed in a red rectangular box, and a red arrow points from the right side of the box towards the link text.

3. Enter your username and click Continue. You'll receive an email at the email address specified on your Salesforce.com.



The screenshot shows the 'Having trouble logging in?' page on Salesforce. At the top is the 'salesforce' logo. Below the logo is the heading 'Having trouble logging in?'. Underneath the heading is a list of four bullet points providing troubleshooting tips. Below the list is the text 'If you still can't log in, enter your user name to reset your password.'. At the bottom of the page, there is a 'User Name' input field containing the text 'admin@bisp.com' and a blue 'Continue' button. The 'Continue' button is enclosed in a red rectangular box, and a red arrow points from the right side of the box towards the button text. At the very bottom of the page, there is a link: 'This video may help if you are having issues logging in.'

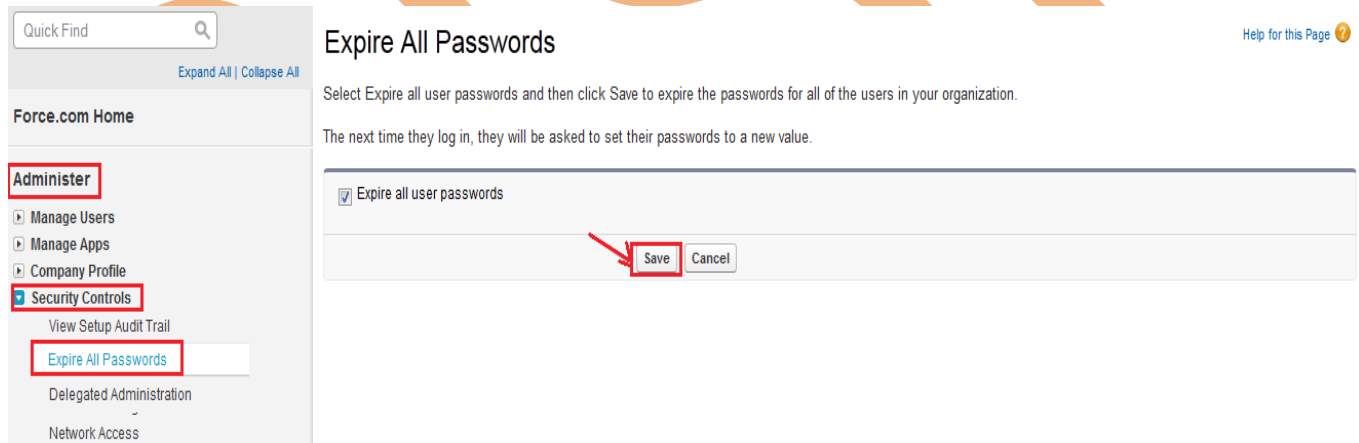
4. Click the link provided in the email, answer your password question, and click Continue. A temporary password is automatically sent to your email address.
5. Click the link to login using the temporary password.  
When prompted, enter a new password.

### Expiring passwords :

You can expire passwords for all users any time to enforce extra security for your organization. After you expire passwords, users may need to activate their computers to successfully log in to Salesforce.com

#### How to set Expire Password :

**Setup > Administration Setup > Security Control > Expire All Password**, Select the Expire all user password checkbox and click Save button.



The screenshot displays the Salesforce 'Expire All Passwords' configuration page. On the left, the navigation sidebar is visible, with 'Administer' and 'Security Controls' highlighted. The 'Expire All Passwords' link is also highlighted. The main content area shows the 'Expire All Passwords' page with a checkbox for 'Expire all user passwords' checked. Below the checkbox are 'Save' and 'Cancel' buttons, with a red arrow pointing to the 'Save' button. The page title is 'Expire All Passwords' and there is a 'Help for this Page' link in the top right corner.

### Password policies :

In Salesforce.com several password and login policy features that help you to improve your organization's security.

#### For set Password policies :

**Setup > Administration Setup > Security Controls > Password Policies.**

Set the required settings and then click on **Save** button.

## Password Policies

Set the password restrictions and login lockout policies for all users.

### Password Policies

User passwords expire in	90 days
Enforce password history	3 passwords remembered
Minimum password length	8 characters
Password complexity requirement	Must mix alpha and numeric
Password question requirement	Cannot contain password
Maximum invalid login attempts	10
Lockout effective period	15 minutes

### Forgot Password / Locked Account Assistance

Message

Help link

Forgot Password Preview If you still can't log in, try the following: Contact your company's administrator for assistance.

Locked Account Preview To reset your account, try the following: Contact your company's administrator for assistance.

### API Only User Settings

Alternative Home Page

### Maximum invalid login attempts :

SalesForce.com provide number of incorrect login attempts allowed by a user before they become locked out. The options are No limit, 2, 3, 5,6 and 10.

### Password expired? We'll prompt you to change your password :

1. When prompted, select how you would like to get the token:

#### SMS Text Message

Your administrator enabled SMS identity, this is the default option. You're prompted to enter your mobile phone number when logging into Salesforce. Adding your phone number here verifies your mobile number and enables this option when you're challenged.

#### Email

If you are out of mobile verification and have not added a time based token, this is the default option. Click Email me a verification code when prompted during login. Salesforce sends an activation email to the email address specified on your user detail page.

The code can be used for up to 24 hours from the time you requested the verification code.

2. Enter the token or verification code in Salesforce.com.
3. Click on Validate and Login.

## Grant Login Access :

There are many occasions when it is useful for you to log in as one of the users in your organization.

To assist you, your administrator or a customer support representative may need to log in to the application using your login. You can grant access to them for a specified duration. For security reasons.

### How to Set Grant Login Access :

**Setup > My Setting > Personal > Grant Account Login Access.**

The screenshot displays the 'Grant Account Login Access' configuration page in Salesforce. The page title is 'Grant Account Login Access'. Below the title, there is a description: 'To assist with support issues, you may grant your administrator or support personnel the ability to login as you and access your data.' The user's name is 'yogesh@ivs.com'. The main content area is a table with two columns: 'Grant Access To' and 'Access Duration'. The first row is 'Your Company's Administrator' with a duration of '3 Days (exp. 12/20/2013)'. The second row is 'Salesforce.com Support' with a duration of '1 Week (exp. 12/24/2013)'. At the bottom of the table, there are 'Save' and 'Cancel' buttons. The 'Save' button is highlighted with a red box and an arrow. The left sidebar shows 'My Settings' with 'Personal' and 'Grant Account Login Access' highlighted. The top navigation bar shows 'yogesh sharma' and 'My Settings' highlighted.

## Creating custom user fields in Salesforce.com :

You can create custom fields for users and set custom links that appear on the user detail page.

### How To Create Custom Fields :

**Setup > App Setup > Customize > Users > Fields**, Then scroll down to the User Custom Fields section:

Search... Search

yogesh sharma Setup Help Recurment Mangment

Home Positions Job Applications Departments Employees wiki Employment websites Employee List Reports Dashboards All Details ZIP Codes coloeges +

Quick Find

Expand All | Collapse All

Force.com Home

Administer

Manage Users

Build

Customize

Users

Fields

Page Layouts

Related Lookup Filters

Validation Rules

Triggers

Field Sets

Compact Layouts **New!**

## User Fields

Help for this Page

This page allows you to specify the fields that can appear on the User page. You can create up to 500 User custom fields.

Note that deleting a custom field will delete any filters that use the custom field. It may also change the result of Assignment or Escalation Rules that rely on the custom field data.

### User Standard Fields

User Standard Fields Help

Action	Field Label	Field Name	Data Type	Controlling Field
	SAML Federation ID	FederationIdentifier	Text(512)	
	Start of Day	StartDay	Picklist	
	Stay-in-Touch Email Note	StayInTouchNote	Text(512)	
	Stay-in-Touch Email Signature	StayInTouchSignature	Text(512)	
	Stay-in-Touch Email Subject	StayInTouchSubject	Text(80)	
	Time Zone	TimeZoneSidKey	Picklist	
	Title	Title	Text(80)	
	Username	Username	Text(80)	

### User Custom Fields

New Field Dependencies

User Custom Fields Help

No custom fields defined

**Step 1 :** Click on **New** button and select any field click on **Next** button.

User

## New Custom Field

Help for this Page

Step 1. Choose the field type

Step 1

Next Cancel

Specify the type of information that the custom field will contain.

### Data Type

**Checkbox** Allows users to select a True (checked) or False (unchecked) value.

**Step 2 :** Fill all fields and click on **Next** Button.

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label  i

Default Value  Checked  Unchecked

Field Name  i

Description

Help Text  i

Previous **Next** Cancel

**Step 3 :** Click on Next button.  
**Step 4 :** Click on **Save** button.

User  
 New Custom Field

[Help for this Page ?](#)

Step 4. Add to page layouts Step 4 of 4

Previous Save & New Save Cancel

Field Label	MuchCheck
Data Type	Checkbox
Field Name	MuchCheck
Description	

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

<input checked="" type="checkbox"/> Add Field	Page Layout Name
<input checked="" type="checkbox"/>	User Layout

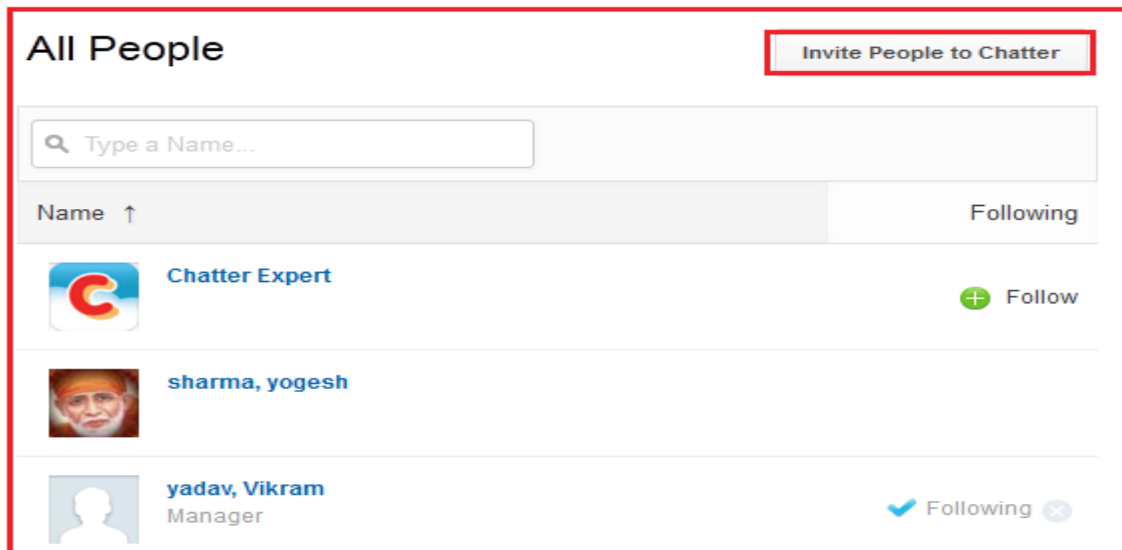
When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New **Save** Cancel

## Set up Chatter Free and Chatter external users

### Chatter is FREE for your whole company :

Chatter application like any social network, is better if more people are using it. every Salesforce customer unlimited free Chatter licenses. It doesn't matter a company small with 30 employees or a large/ global organization with 500,000 employees. Chatter is free for everyone in your company.



### There are three ways Salesforce admin can help get everyone on chatter :

#### 1. Add all employees to Chatter

Use the Data Loader to add all your employees to Chatter at once.

**Setup > Administration > Data Management > Data Loader**, after that follow the instructions.

#### 2. Add new users one at a time

If you want to add employees one at a time, Click on **Setup > Administration > Manage Users > Users > click on New User** button.

#### 3. Turn on invitations

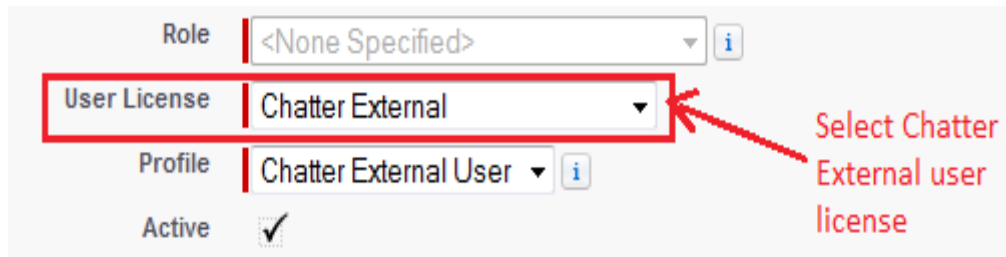
Turn on Chatter invitations to let employees invite coworkers. Invitations are limited to the domains you approve. To turn on invitations, **Setup > Customize > Chatter > Click on Settings**, there you can manage chatter setting. click on **Edit** Button.

### Chatter external users :

Chatter External is Designed to allow customers in Chatter groups. Customers are users outside of your company's email domains. They have very limited Chatter access and can only see groups they're invited to and interact with members of those groups.

## How to create External user :

**Setup > Manages Users > Users** click on **New User** button. if you have created user already click on **Edit** link.



The screenshot shows a portion of the Salesforce user creation form. The 'User License' dropdown menu is highlighted with a red box and contains the text 'Chatter External'. A red arrow points from the text 'Select Chatter External user license' to the 'Chatter External' option in the dropdown. Other fields visible include 'Role' set to '<None Specified>', 'Profile' set to 'Chatter External User', and 'Active' checked.

After then click on **Save** button.

## Deferent between Chatter Free and Chatter external users :

Chatter Free	Chatter external
<b>Chatter Free application is Designed for Unlimited, Enterprise, and Professional Edition if users that don't have Salesforce licenses but need access to Chatter. These users can access standard Chatter people, profiles, groups, and files.</b>	Chatter External is Designed to allow customers in Chatter groups. Customers are users outside of your company's email domains. They have very limited Chatter access and can only see groups they're invited to and interact with members of those groups.

## User Migration

### Installing the Force.com Migration Tool

Firstly will need Java and Ant installed on your local machine For install the Force.com Migration Tool.

After then you can download the Force.com Migration Tool from a Salesforce organization.

#### To use the Force.com Migration Tool :

1. Install **Java JDK**, Version 6.1 or greater on the deployment machine.
2. Install **Apache Ant**, Version 1.6 or greater on the deployment machine.
3. Set up the environment variables (ANT\_HOME, JAVA\_HOME, and PATH).

**Example ANT\_HOME** :- Open cmd and write, set path=%ANT\_HOME%\bin;

**Example JAVA\_HOME** :- C:\Program Files\Java\jdk1.7.0\_45

4. For Verify JDK or ANT version .

JDK : javac -version

ANT : ant -version



5. login Salesforce then click on **Setup > developer > Tools**, then download **Force.com Migration Tool**

The screenshot shows the Salesforce developer interface. At the top, the user 'yogesh sharma' is logged in, and the 'Setup' button is highlighted in red. Below the navigation bar, the 'Tools' section is active, and the 'Force.com Migration Tool' is highlighted with a red box and a red arrow. The 'Tools' section is divided into three categories: Salesforce-Supported Tools, Community-Supported Tools (Salesforce.com Support Not Available), and Partner-Supported Data Loading Tools. The 'Force.com Migration Tool' is listed under the first category with a description: 'A Java/ANT-based command line utility for scripted deployment of application metadata.'

6. Unzip the downloaded Force.com Migration Tool, The Force.com Migration Tool contains the following:

- Readme.html file that explains how to use the tools
- Jar file containing the ant task: ant-salesforce.jar
- open sample folder In this folder following list:
  - codepkg\classes folder that contains SampleDeployClass.cls and SampleFailingTestClass.cls
  - codepkg\triggers folder that contains SampleAccountTrigger.trigger
  - mypkg\objects folder that contains the custom objects used in the examples
  - removecodepkg folder that contains XML files for removing the examples from your organization

- sample build.properties file that you must edit, specifying your credentials, in order to run the - sample ant tasks in build.xml.
  - sample build.xml file, that exercises the deploy and retrieveAPI calls.
7. Copy the ant-salesforce.jar file into the ant lib directory. The ant lib directory is located in the root folder of your Ant installation.
  8. Open the sample subdirectory.
  9. Edit the **build.properties** file:

```

1 # build.properties
2 #
3
4 # Specify the login credentials for the desired Salesforce organization
5 sf.username = <https://login.salesforce.com/>
6 sf.password = <write here password>
7 #sf.pkgName = <Insert comma separated package names to be retrieved>
8 #sf.zipFile = <Insert path of the zipfile to be retrieved>
9 #sf.metadataType = <Insert metadata type name for which listMetadata or bulkRetrieve operations are to be performed>
10
11 # Use 'https://login.salesforce.com' for production or developer edition (the default if not specified).
12 # Use 'https://test.salesforce.com' for sandbox.
13 sf.serverurl =https://test.salesforce.com
14
15 sf.maxPoll = 20
16 # If your network requires an HTTP proxy, see http://ant.apache.org/manual/proxy.html for configuration.
17 #
18

```

10. Enter ant deployCode. This runs the deployAPI call, using the sample class and Account trigger provided with the Force.com Migration Tool. The ant deployCode calls the Ant target named deploy in the build.xml file.

```

1 <!-- Shows deploying code & running tests for package 'codepkg' -->
2 <target name="deployCode">
3 <!-- Upload the contents of the "codepkg" package, running the tests for just 1 class -->
4 <sf:deploy username="{sf.username}" password="{sf.password}" serverurl="{sf.serverurl}" deployroot="codepkg">
5 <runTest>SampleDeployClass</runTest>
6 </sf:deploy>
7 </target>

```

11. To remove the test class and trigger added as part of the execution of ant deployCode, enter the following in the command window: ant undeployCode. ant undeployCode calls the Ant target named undeployCode in the build.xml file.

```
1 <target name="undeployCode">
2     <sf:deploy username="{sf.username}" password="{sf.password}" serverurl=
3         "{sf.serverurl}" deployroot="removecodepkg"/>
4 </target>
```

## User/Group Backup Recover

### Backup my Salesforce Organization :

In Salesforce.com are four ways to backup your Organization depending on your needs. Once you login to your Own Backup account, you should add one (or more) of these services, according to your needs:

- Backup of your Salesforce data (including custom tables, custom files, attachments and chatter attachments).
- Backup of your Salesforce metadata (Workflows, Layouts, Apex Pages, Reports, etc.)
- Backup of your Sandbox metadata.
- Backup of your Sandbox data.

### User/Group Backup :

Data Export feature is available on Salesforce, In salesforce.com you can prepare a copy of all your data .

on this page you can start the export process manually or schedule it to run automatically.

when export is ready for download, you will receive an email containing a link that allows you to download the files

Export files are available on this page for 48 hours, after that they are deleted it's available only .CSV format.

### How to take Export data in Salesforce :

Click **Setup -> Data Management -> Data Export**



After click on **Data Export** you can see new page there is two option is available **Export Now** and **Schedule Export** you can see below.

## Schedule Data Export

[Help for this Page](#)

**Schedule Data Export** Save Cancel

Export File Encoding: ISO-8859-1 (General US & Western European, ISO-LATIN-1)

Include images, documents, and attachments  
 Include Chatter files and Salesforce CRM Content document versions  
 Replace carriage returns with spaces

Schedule Data Export

Frequency:  On day 1 of every month  On the 1st Sunday of every month

Start: 10/11/2013 [10/11/2013]  
 End: 11/11/2013 [10/11/2013]

Preferred Start Time: --None--

Exact start time will depend on job queue activity.

Save Cancel

**Exported Data**  
 Select what type of information you would like to include in the export. The data types listed below use the Apex API names. If you are not familiar with these names, select Include all data for your export.

- Include all data**
- |   |   |   |
|---|---|---|
| <input type="checkbox"/> RecordType             | <input type="checkbox"/> BusinessProcess        | <input type="checkbox"/> Contract                   |
| <input type="checkbox"/> Approval               | <input type="checkbox"/> ContractContactRole    | <input type="checkbox"/> EntityHistory              |
| <input type="checkbox"/> FieldHistory           | <input type="checkbox"/> User                   | <input type="checkbox"/> EmailRoutingAddress        |
| <input type="checkbox"/> OrgWideEmailAddress    | <input type="checkbox"/> LinkReference          | <input type="checkbox"/> Campaign                   |
| <input type="checkbox"/> CampaignMember         | <input type="checkbox"/> Account                | <input type="checkbox"/> Contact                    |
| <input type="checkbox"/> Lead                   | <input type="checkbox"/> Opportunity            | <input type="checkbox"/> AccountContactRole         |
| <input type="checkbox"/> OpportunityContactRole | <input type="checkbox"/> OpportunityHistory     | <input type="checkbox"/> OpportunityLineItem        |
| <input type="checkbox"/> OpportunityCompetitor  | <input type="checkbox"/> Partner                | <input type="checkbox"/> Note                       |
| <input type="checkbox"/> FiscalYearSettings     | <input type="checkbox"/> Period                 | <input type="checkbox"/> PricebookEntry             |
| <input type="checkbox"/> Product2               | <input type="checkbox"/> Asset                  | <input type="checkbox"/> Case                       |
| <input type="checkbox"/> CaseComment            | <input type="checkbox"/> CaseContactRole        | <input type="checkbox"/> CaseHistory2               |
| <input type="checkbox"/> CaseSolution           | <input type="checkbox"/> Solution               | <input type="checkbox"/> ContentVersion             |
| <input type="checkbox"/> NewsFeed               | <input type="checkbox"/> FeedTrackedChange      | <input type="checkbox"/> FeedPost                   |
| <input type="checkbox"/> FeedComment            | <input type="checkbox"/> EntitySubscription     | <input type="checkbox"/> FeedFieldHistory           |
| <input type="checkbox"/> ProcessInstance        | <input type="checkbox"/> ProcessInstanceStep    | <input type="checkbox"/> ProcessInstanceWorkitem    |
| <input type="checkbox"/> UserRole               | <input type="checkbox"/> Task                   | <input type="checkbox"/> Event                      |
| <input type="checkbox"/> TaskRelation           | <input type="checkbox"/> EventRelation          | <input type="checkbox"/> EmailDisclaimer            |
| <input type="checkbox"/> Pricebook2             | <input type="checkbox"/> Idea                   | <input type="checkbox"/> IdeaComment                |
| <input type="checkbox"/> PushProfileMapping     | <input type="checkbox"/> PushIntent             | <input type="checkbox"/> MetricsTransmissionHistory |
| <input type="checkbox"/> JigsawSavedSearch      | <input type="checkbox"/> DatacloudPurchaseUsage | <input type="checkbox"/> SocialPersona              |
| <input type="checkbox"/> TopicGroupActivity     | <input type="checkbox"/> TopicUserActivity      | <input type="checkbox"/> TrendingTopic              |
| <input type="checkbox"/> Review__c              | <input type="checkbox"/> Employment_website__c  | <input type="checkbox"/> Job_Posting__c             |
| <input type="checkbox"/> ForTesting__c          | <input type="checkbox"/> Position__c            | <input type="checkbox"/> Candidate__c               |
| <input type="checkbox"/> Job_Application__c     | <input type="checkbox"/> DepartMent__c          | <input type="checkbox"/> Back_Office__c             |
| <input type="checkbox"/> Employee__c            | <input type="checkbox"/> Book__c                |   |

After click on Start Export few second take you got one new screen and send link you mail id you can see below. and all so check your mail id.

## Monthly Export Service

[Help for this Page](#) ?

Data Export lets you prepare a copy of all your data in salesforce.com. From this page you can start the export process manually or schedule it to run automatically. When an export is ready for download you will receive an email containing a link that allows you to download the file(s). The export files are also available on this page for 48 hours, after which time they are deleted.

**Next scheduled export:**  
A data export is currently in progress for your organization.

[Export Now](#) [Schedule Export](#)

Your export has been queued. You will receive an email notification when it is completed.

Scheduled By	<a href="#">yogesh sharma</a>
Schedule Date	10/11/2013
Export File Encoding	ISO-8859-1 (General US & Western European, ISO-LATIN-1)

### Step 3 :

After that you can Refresh your page you can see that link available on page click to given below link and download export data. downloaded file is available in zip folder.

# Monthly Export Service

[Help for this Page](#) ?

Data Export lets you prepare a copy of all your data in salesforce.com. From this page you can start the export process manually or schedule it to run automatically. When an export is ready for download you will receive an email containing a link that allows you to download the file(s). The export files are also available on this page for 48 hours, after which time they are deleted.

**Next scheduled export:**  
None

[Export Now](#) [Schedule Export](#)

Scheduled By [yogesh sharma](#)

Schedule Date 10/11/2013

Export File Encoding ISO-8859-1 (General US & Western European, ISO-LATIN-1)

Action	File Name	File Size
<a href="#">download</a>	WE_00D900000000OX9EAM_1.ZIP	12.7K

← Click here dwnload zip file

## Schedule Export in SalesForce:

SalesForce provide to you Schedule Export option its allows you to schedule the export process for weekly or monthly intervals, and you can Export by start date and end date.

You can schedule export data any day of month, any weak of month, and all you can choose Start date to End date for schedule export data.

After schedule you can click on [Save](#) button.

# Schedule Data Export

[Help for this Page](#)

### Schedule Data Export

Export File Encoding: ISO-8859-1 (General US & Western European, ISO-LATIN-1)

Include images, documents, and attachments

Include Chatter files and Salesforce CRM Content document versions

Replace carriage returns with spaces

Schedule Data Export

Frequency:  On day 1 of every month  On the 1st Sunday of every month

Start: 10/11/2013 [10/11/2013]

End: 11/11/2013 [10/11/2013]

Preferred Start Time: --None--

Exact start time will depend on job queue activity.

## Exported Data

Select what type of information you would like to include in the export. The data types listed below use the Apex API names. If you are not familiar with these names, select include all data for your export.

Include all data

<input type="checkbox"/> RecordType	<input type="checkbox"/> BusinessProcess	<input type="checkbox"/> Contract
<input type="checkbox"/> Approval	<input type="checkbox"/> ContractContactRole	<input type="checkbox"/> EntityHistory
<input type="checkbox"/> FieldHistory	<input type="checkbox"/> User	<input type="checkbox"/> EmailRoutingAddress
<input type="checkbox"/> OrgWideEmailAddress	<input type="checkbox"/> LinkReference	<input type="checkbox"/> Campaign
<input type="checkbox"/> CampaignMember	<input type="checkbox"/> Account	<input type="checkbox"/> Contact
<input type="checkbox"/> Lead	<input type="checkbox"/> Opportunity	<input type="checkbox"/> AccountContactRole
<input type="checkbox"/> OpportunityContactRole	<input type="checkbox"/> OpportunityHistory	<input type="checkbox"/> OpportunityLineItem
<input type="checkbox"/> OpportunityCompetitor	<input type="checkbox"/> Partner	<input type="checkbox"/> Note
<input type="checkbox"/> FiscalYearSettings	<input type="checkbox"/> Period	<input type="checkbox"/> PricebookEntry
<input type="checkbox"/> Product2	<input type="checkbox"/> Asset	<input type="checkbox"/> Case
<input type="checkbox"/> CaseComment	<input type="checkbox"/> CaseContactRole	<input type="checkbox"/> CaseHistory2
<input type="checkbox"/> CaseSolution	<input type="checkbox"/> Solution	<input type="checkbox"/> ContentVersion
<input type="checkbox"/> NewsFeed	<input type="checkbox"/> FeedTrackedChange	<input type="checkbox"/> FeedPost
<input type="checkbox"/> FeedComment	<input type="checkbox"/> EntitySubscription	<input type="checkbox"/> FeedFieldHistory
<input type="checkbox"/> ProcessInstance	<input type="checkbox"/> ProcessInstanceStep	<input type="checkbox"/> ProcessInstanceWorkitem
<input type="checkbox"/> UserRole	<input type="checkbox"/> Task	<input type="checkbox"/> Event
<input type="checkbox"/> TaskRelation	<input type="checkbox"/> EventRelation	<input type="checkbox"/> EmailDisclaimer
<input type="checkbox"/> Pricebook2	<input type="checkbox"/> Idea	<input type="checkbox"/> IdeaComment
<input type="checkbox"/> PushProfileMapping	<input type="checkbox"/> PushIntent	<input type="checkbox"/> MetricsTransmissionHistory
<input type="checkbox"/> JigsawSavedSearch	<input type="checkbox"/> DatacloudPurchaseUsage	<input type="checkbox"/> SocialPersona
<input type="checkbox"/> TopicGroupActivity	<input type="checkbox"/> TopicUserActivity	<input type="checkbox"/> TrendingTopic
<input type="checkbox"/> Review__c	<input type="checkbox"/> Employment_website__c	<input type="checkbox"/> Job_Posting__c
<input type="checkbox"/> ForTesting__c	<input type="checkbox"/> Position__c	<input type="checkbox"/> Candidate__c
<input type="checkbox"/> Job_Application__c	<input type="checkbox"/> Department__c	<input type="checkbox"/> Back_Office__c
<input type="checkbox"/> Employee__c	<input type="checkbox"/> Book__c	

After click on Save button you can see one message in message some write **Next Schedule Export** you can see below. you get a remainder on this date every month.

## Monthly Export Service

[Help for this Page](#)

Data Export lets you prepare a copy of all your data in salesforce.com. From this page you can start the export process manually or schedule it to run automatically. When an export is ready for download you will receive an email containing a link that allows you to download the file(s). The export files are also available on this page for 48 hours, after which time they are deleted.

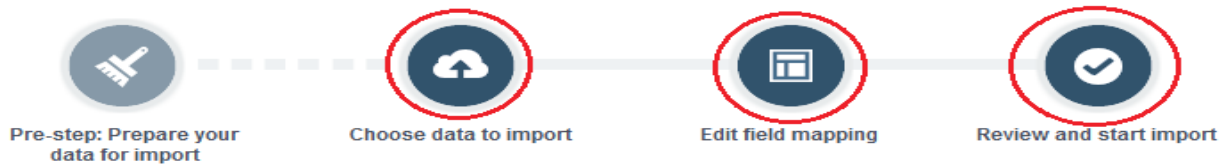
**Next scheduled export:**  
11/11/2013 2:00 PM

## User/Group Recover By using Backup : Using Import Wizard :

The Data Import Wizard provides a GUI Interface, Easily import data on Salesforce. It is a web based tools.

Data Import Wizard provides a unified interface that's you import a number of standard Salesforce objects, solutions, leads, contacts, and including accounts. The wizard also lets you import custom objects.

### Import data in three easy steps :



### How To import data by Import Data Wizard

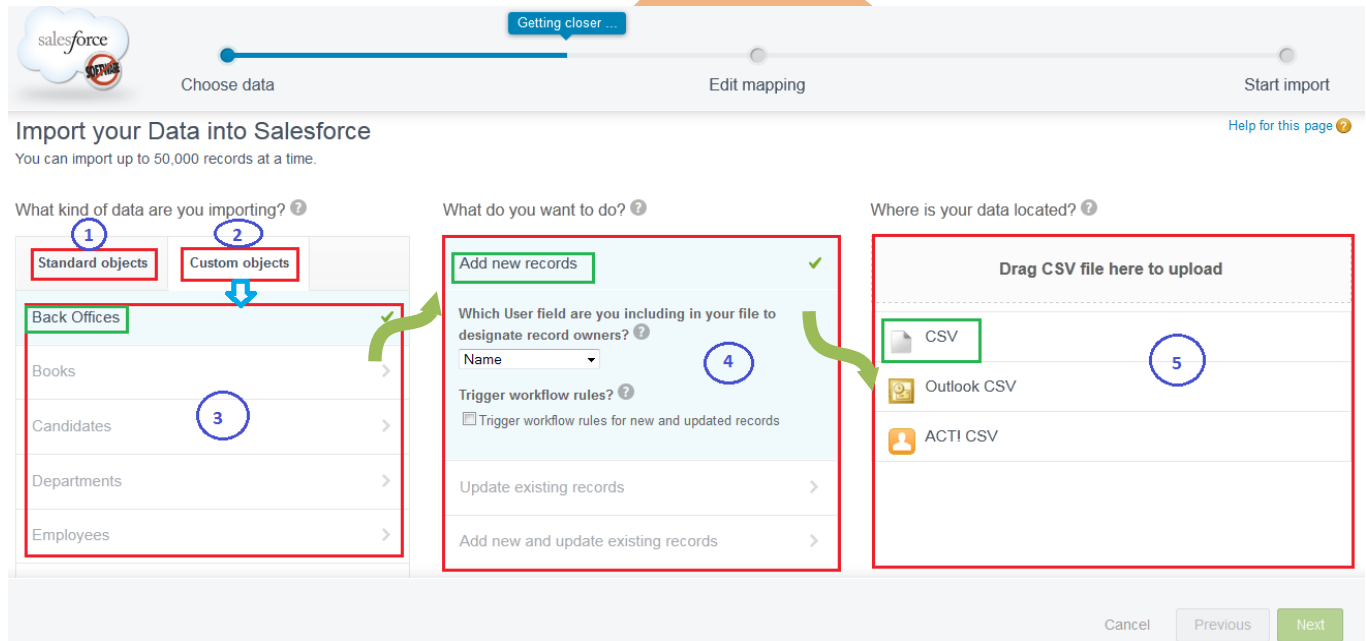
Click to **Setup** -> **Data Management** -> **Data Import Wizard** click on this link then you can see Data Import Wizard on this page go to down and see Launch Wizard! button click on this button.

### Step 1 :

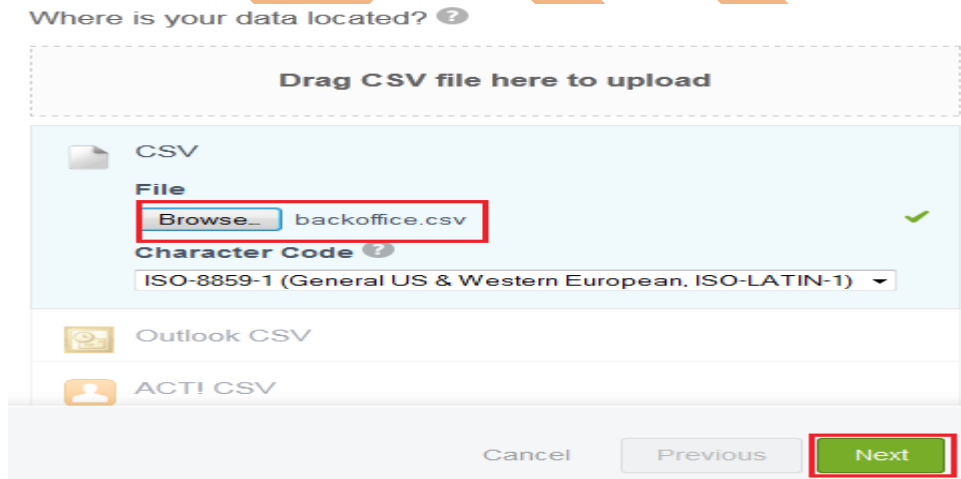


After click on **Launch Wizard!** button, then you have seen new screen there is two option

1. Standard object
  2. Custom object
- Click on **Custom Object** after then you can see custom object Tab list
  - 3. choose custom tab anyone.
  - After click on Custom Tab then you can see new list
  - 4. there is three option select any one, (For ex :- I will select Add new Record )
  - After click on **Add new records link** you can see new list
  - 5. There is three option select any one, (I will select CSV first option)



Then select CSV option and click to **Browse** button and select your .CSV file. and click to **Next** button.



## Step 2 :

After Click to Next button Then you can see new page it called **Edit Mapping** page, if you want to mapped your fields ,if need to change mapped field click on **Change** link after that open new pop box select your mapped field and click to **map** button. Then you click on **Next** Button.



### Edit Field Mapping: Back Offices

[Help for this page](#)

Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
<a href="#">Change</a>	Employee Name	Employee Name	Vikram yadav	vikas	jitendra yadav
<a href="#">Change</a>	Age	Age	26	26	26
<a href="#">Change</a>	Dob	Dob	10/1/1987	6/1/1987	19/2/1987
<a href="#">Change</a>	City	City			

Map your field: Age

Select field

- Back Office Name >
- Employee Name >
- Age > ✓
- Dob >
- City >
- Record Owner >

Cancel

Cancel Previous

### Step 3 :

After that you can see, your selections list, your import will include, and mapping list. After then click on **Start import** button.

The screenshot shows the 'Review & Start Import' interface. At the top, a progress bar indicates three steps: 'Choose data', 'Edit mapping', and 'Start import', with the third step being active. A 'Great job' notification is visible in the top right. Below the progress bar, the title 'Review & Start Import' is followed by the instruction 'Review your import information and press Start Import.' and a 'Help for this page' link. The main content area is divided into three columns: 'Your selections:', 'Your import will include:', and 'Your import will not include:'. The 'Your selections:' column lists 'Back Offices', 'Add new records', and 'backoffice.csv', each with a green checkmark. The 'Your import will include:' column shows 'Data from mapped fields' with a large number '4'. The 'Your import will not include:' column shows 'Data from unmapped fields' with a large number '0'. At the bottom right, there are three buttons: 'Cancel', 'Previous', and 'Start Import', with the 'Start Import' button highlighted with a red box.

### Step 4 :

After Click on **Start import** button then you can see Message box click on **Ok** button

The screenshot shows a success message box with the text: 'Congratulations, your import has started! View your import status on the Bulk Downloads page.' At the bottom right of the message box, there is a green 'Ok' button highlighted with a red box.

### Restore our Salesforce metadata objects :

Own Backup backs up your metadata objects via the metadata API. As such, the backed-up data are compatible with the data that is available to you via the Force.com

IDE. Follow these steps to get your metadata backup and use your Force.com IDE to deploy it back to your Salesforce organization :

- Login to your Own Backup account.
- Select the Salesforce metadata archive and snapshot you would like to restore from.
- Download the Zip file containing your metadata objects backup.
- Extract the zip file to a folder on your computer. Each sub-folder contains a different metadata object. The files inside each folder contain the individual metadata elements in their native file format.
- Use the Force.com IDE to view and deploy the backed-up elements.

## Predefined roles/privileges

### Overview of Roles :

	User Permissions Needed
To create, edit, and delete roles	Manage Users
To assign users to roles	Manage Users

In Salesforce.com Overview of Roles Depending on your sharing settings, roles can control the level of visibility that users have into your organization's data. Users at any given role level can view, edit, and report on all data owned by or shared with users below them in the hierarchy, unless your organization's sharing model for an object specifies otherwise. Specifically, in the Organization-Wide Defaults related list, if the Grant Access Using Hierarchies option is disabled for a custom object, only the record owner and users granted access by the organization-wide defaults receive access to the object's records.

### Working with Roles :

View and manage your organization's roles, from **Setup > Manage Users > Roles**.

The screenshot shows the 'Creating the Role Hierarchy' page in Force.com. The left sidebar has 'Manage Users' and 'Roles' highlighted. The main content area shows a role hierarchy tree for 'cp softtech' with roles like CEO, CFO, COO, Manager, SVP, etc. A red box highlights the 'Show in tree view' dropdown and the role hierarchy tree.

### Show in tree view :

Click Expand All to see all roles, or Collapse All to see only top-level roles. To expand or collapse an individual node, click the plus (+) or minus (-) icon.

### Show in sorted list view :

If your organization has a large number of roles, use this view for easy navigation and filtering.

To show a filtered list of items, select a predefined list from the View drop-down list, or click Create New View to define your own custom views. To edit or delete any view you created, select it from the View drop-down list and click Edit.

### Show in list view :

The columns are not sortable. This view is not available for hierarchies with more than 1,000 roles.

- To create a role, click New Role or Add Role, depending whether you are viewing the list view or tree view of roles, then edit the role fields as needed. You can create up to 500 roles for your organization.
- Edit a role, click Edit next to a role name, then update the role fields as needed.
- Delete a role, click Delete next to the role name.
- Assign other users to a role, click Assign next to the role name.

- View detailed information about a role, click a role name. If you are a Salesforce Knowledge user, you can modify category visibility settings on the role detail page.

### **Administrator privileges :**

One or more individuals in your organization who can configure and customize the application. Users assigned to the System Administrator profile have administrator privileges.

administrator can create user, delete user, View user list and manage all organization data, define role etc.

