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.

History:

Version	Description Change	Author	Publish Date
0.1	Initial Draft	Chandra Prakash Sharma	10th July 2013
0.1	Review#1	Amit Sharma	10th July 2013

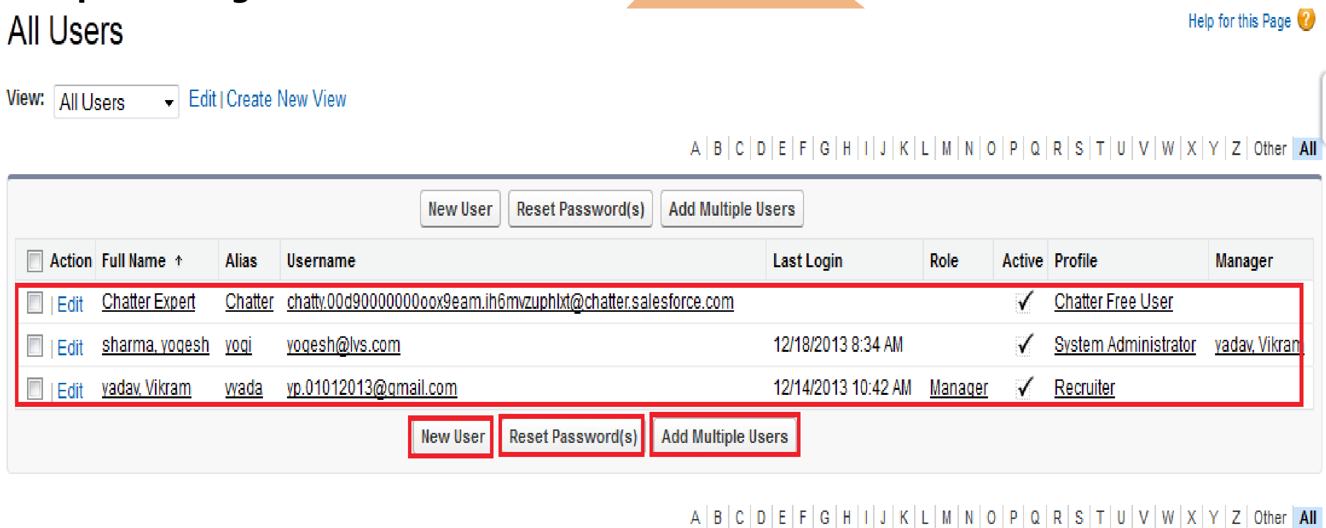
Contents

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**



Creating new users :

following steps for creating a new user :

i. Click on New User button.

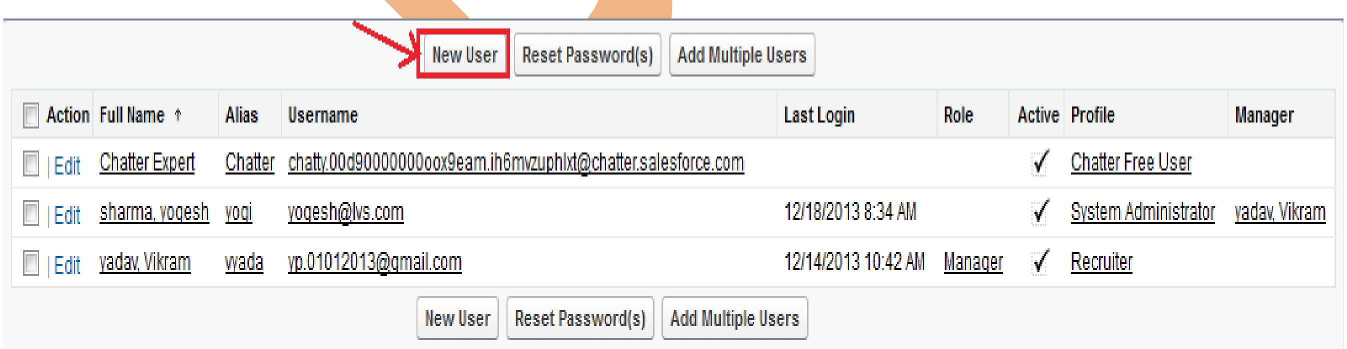
ii. Enter fields in the General Information and Locale Settings.

iii. Check the box Generate new password and notify user immediately.

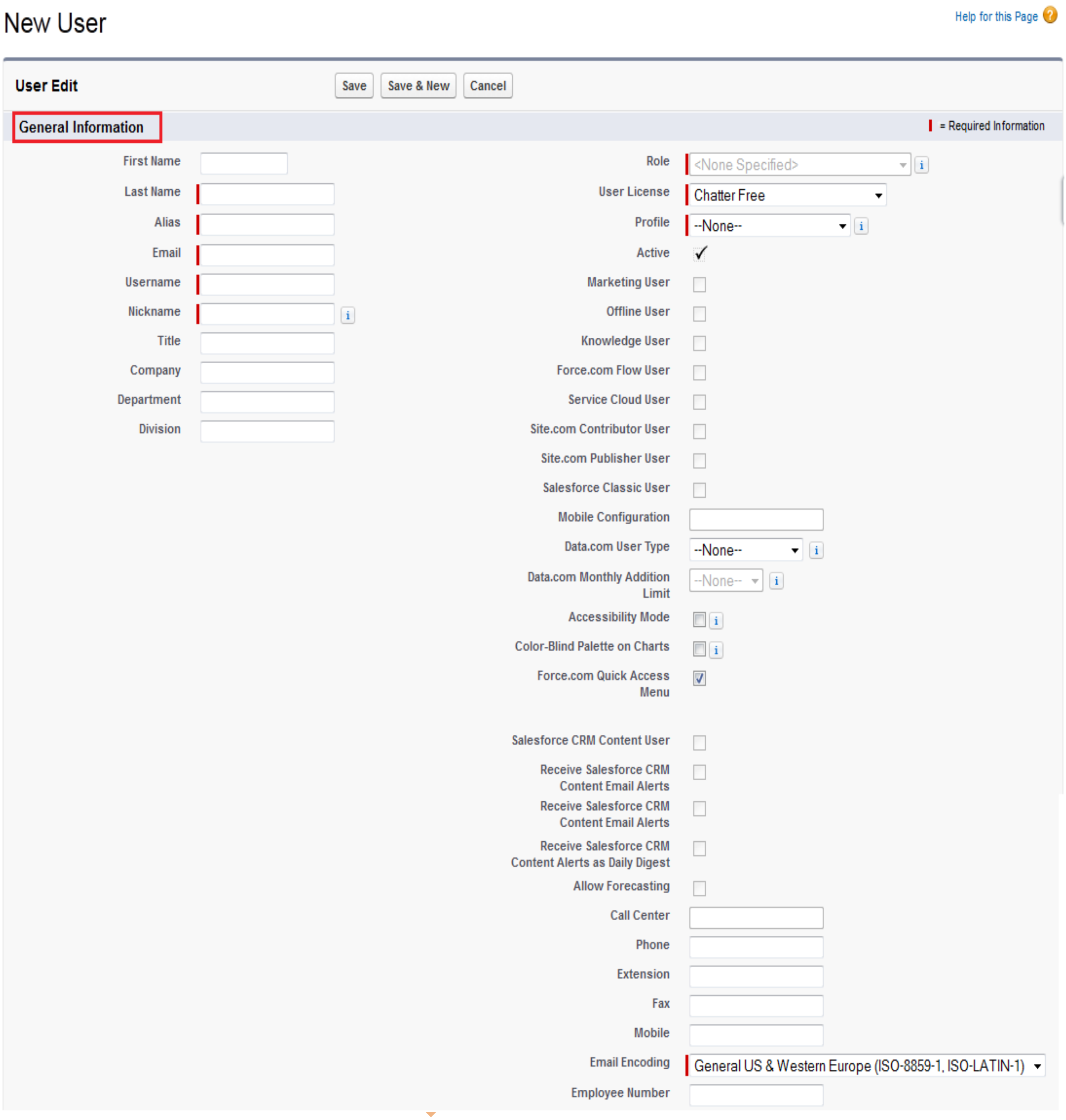
iv. Click on Save button for save the new user details.

To create new user account :

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



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



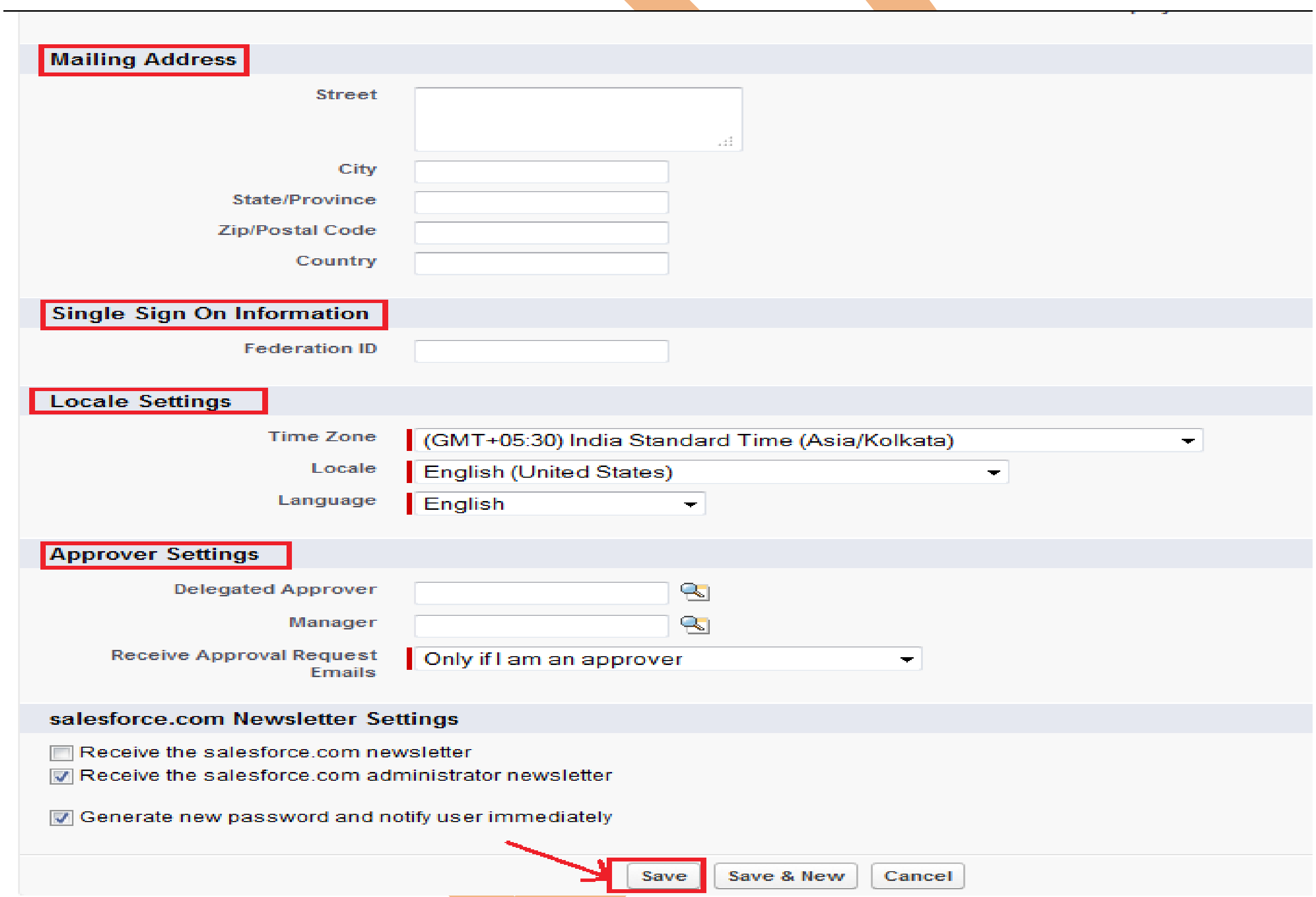
Enter the user's first name, last name, alias, e-mail address, User Name, Nickname.
Select User license, Profile in dropdown list.
checked Active Check box.
You can enable additional features by checked check box :

- Marketing User

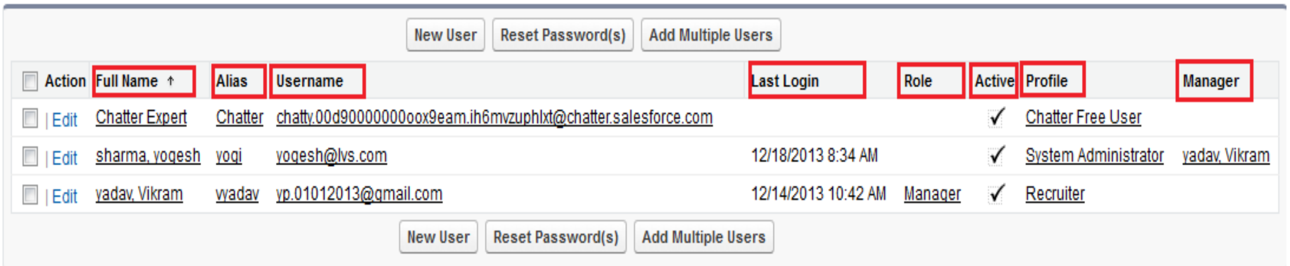
- Offline User
- Knowledge User
- Force.com Flow User
- Service Cloud User
- Site.com Publisher User
- Mobile User [if you purchase this license].
- SalesForce CRM Content User

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.

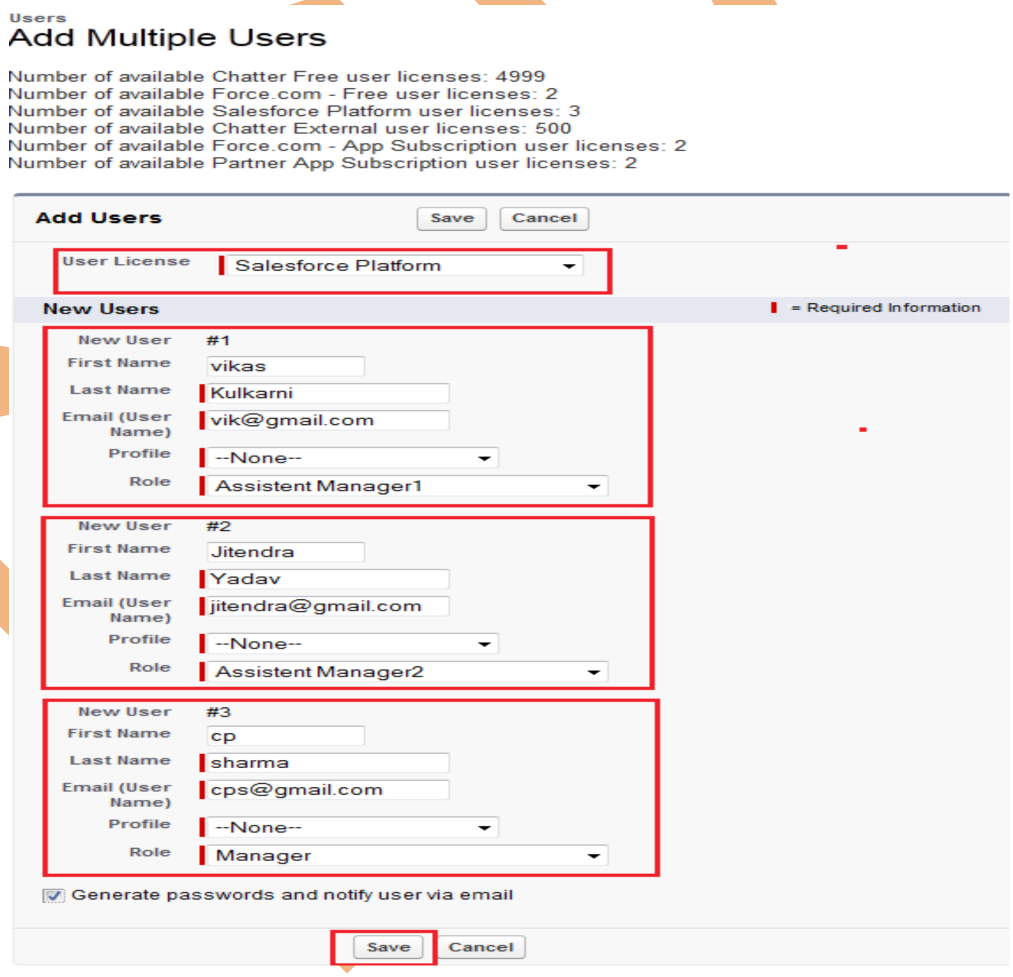


After Saving this page, you can Edit this page following read-only fields and related lists can be seen:



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.



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 :

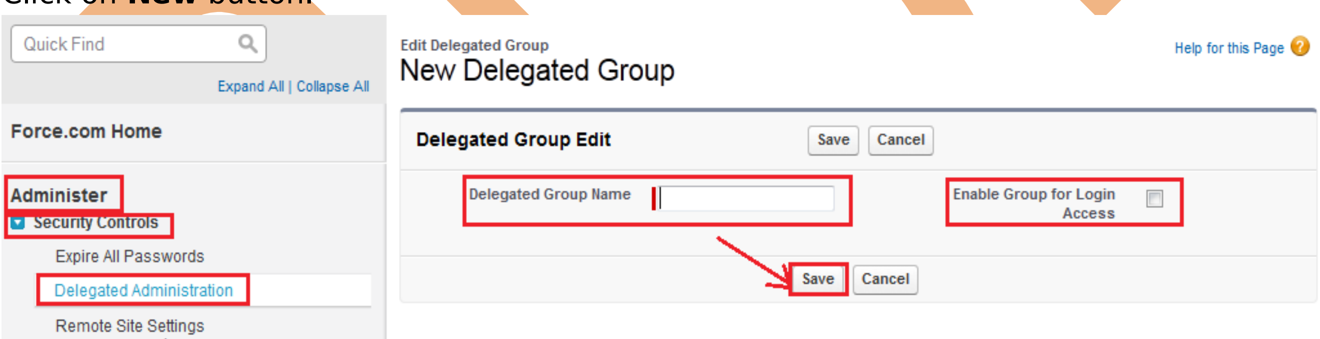
Allows a much greater range of system administration functions to be carried out by the user.
Manage Users permission allows the user to perform the following :

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

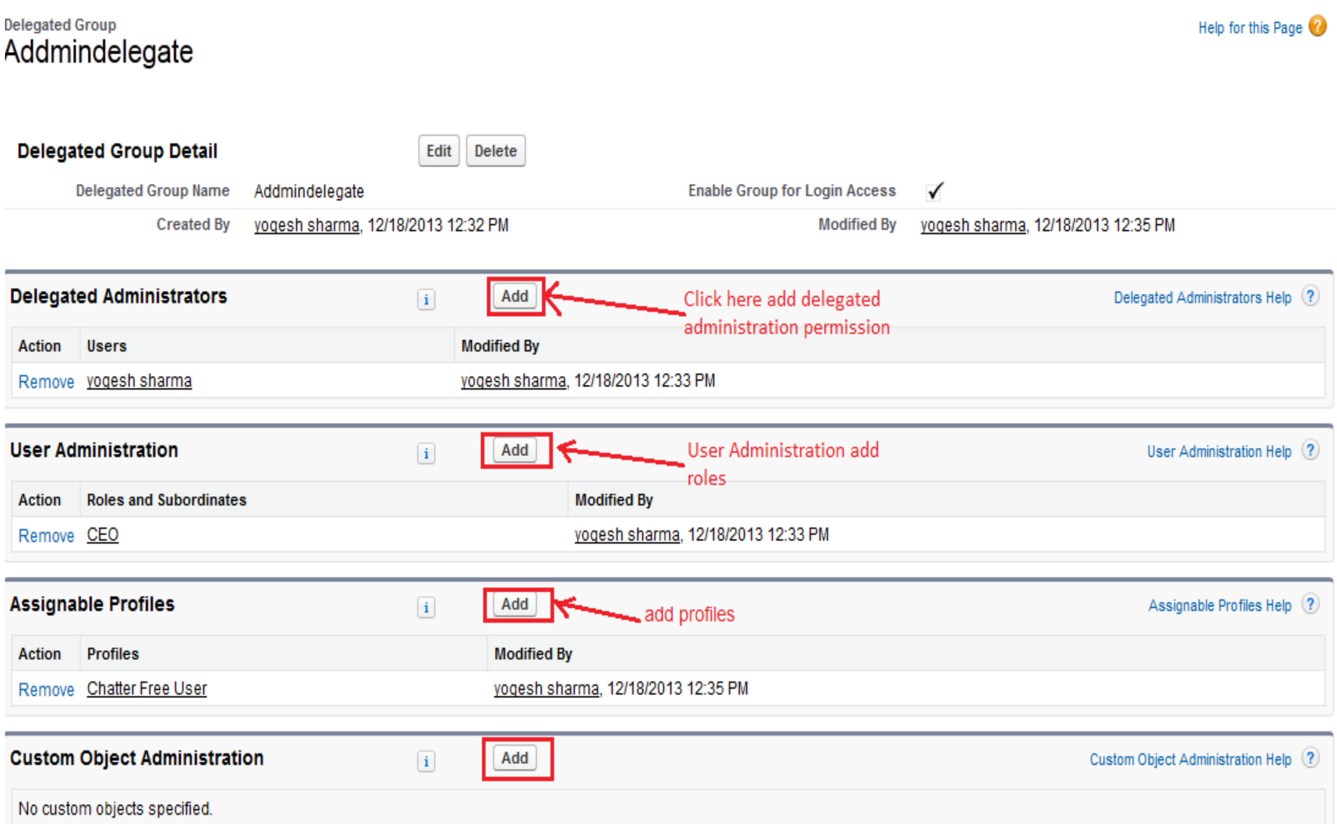
Delegated administration :

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.



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



Deactivating users :

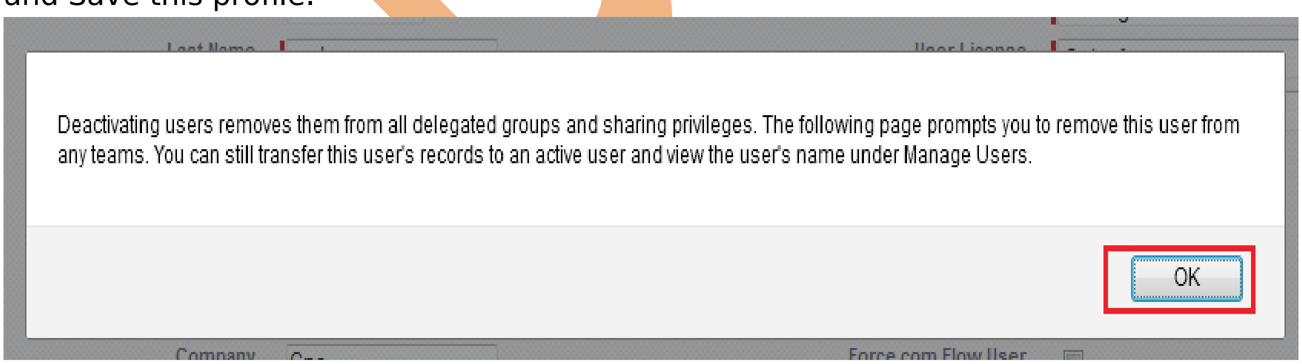
In SalesForce.com You cannot remove users from the Organization, but you can deactivate user profile.

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

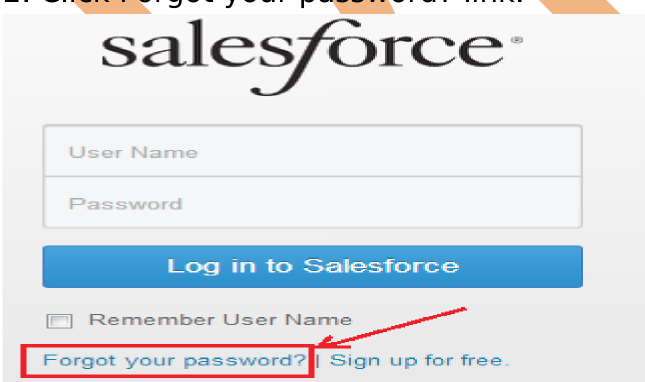
Salesforce.com provide to easy login to the service and to change your password, but you may many time face issues of login in SalesForce.com, if you forget your username or password, or if you're locked out for too many attempts to log on with the wrong credentials. The password policies set up by your 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.

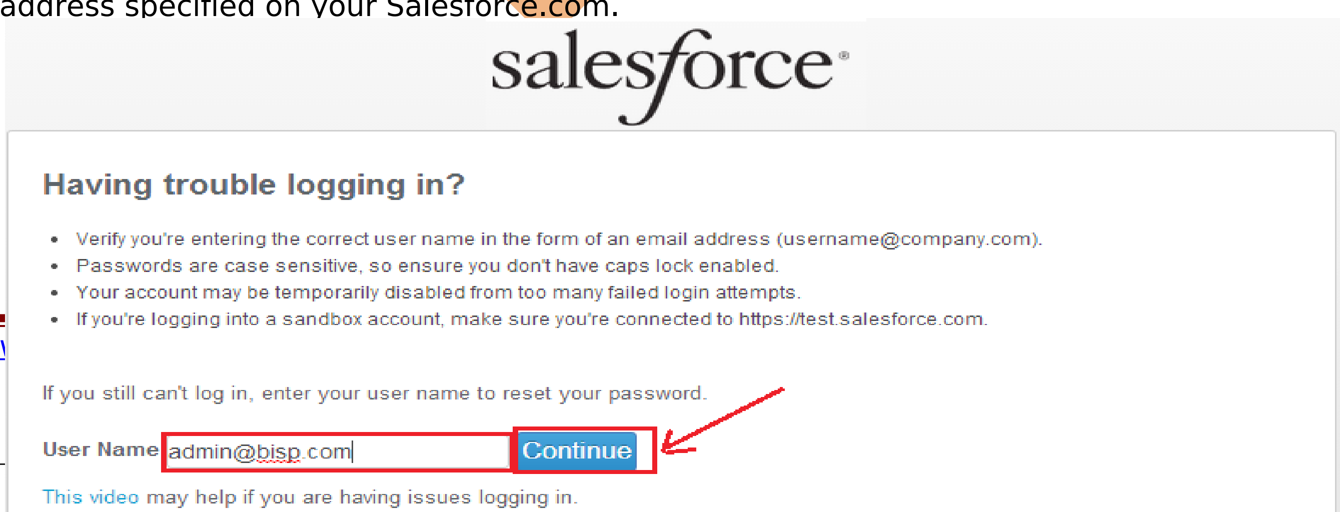
- Forgot your password?
- Locked out? Wait until the lockout period expires and try again, or contact your administrator.
- Password expired? We'll prompt you to change your password.

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.



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



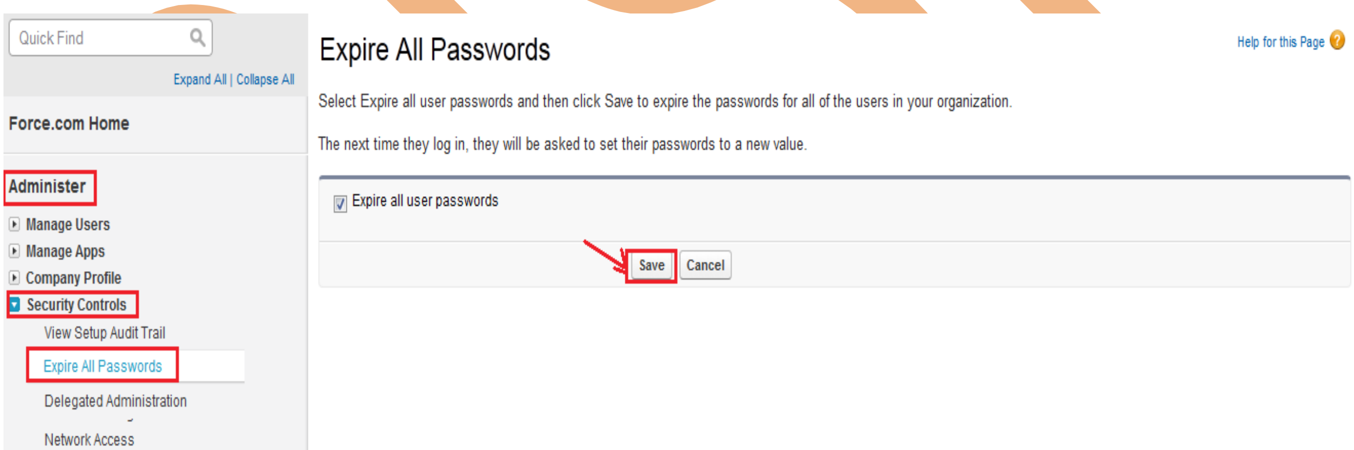
4. Click the link provided in the email, answer your password question, and click Continue. A temporary password is automatically sent to your email address.
5. Click the link to login using the temporary password.
When prompted, enter a new password.

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.

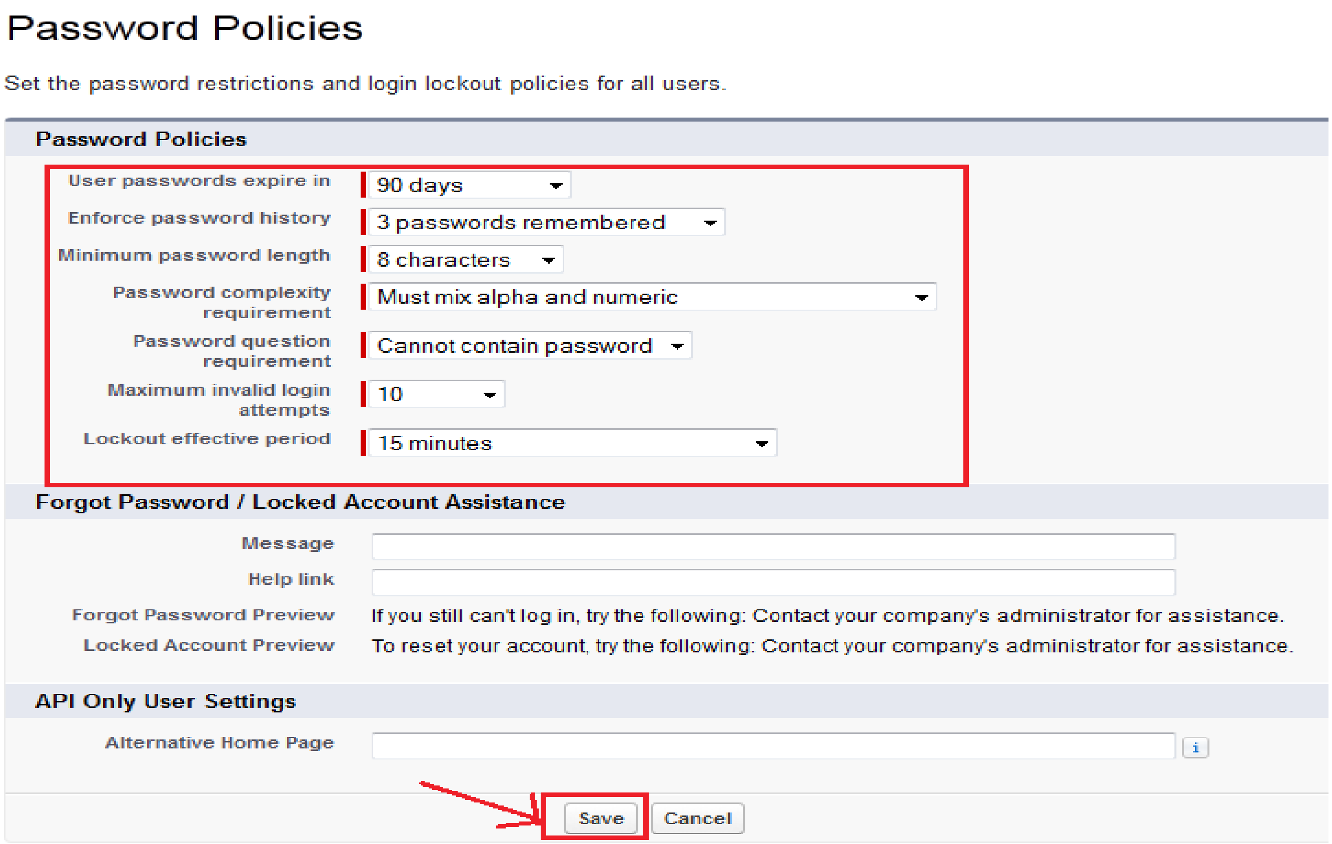


Password policies :

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.



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

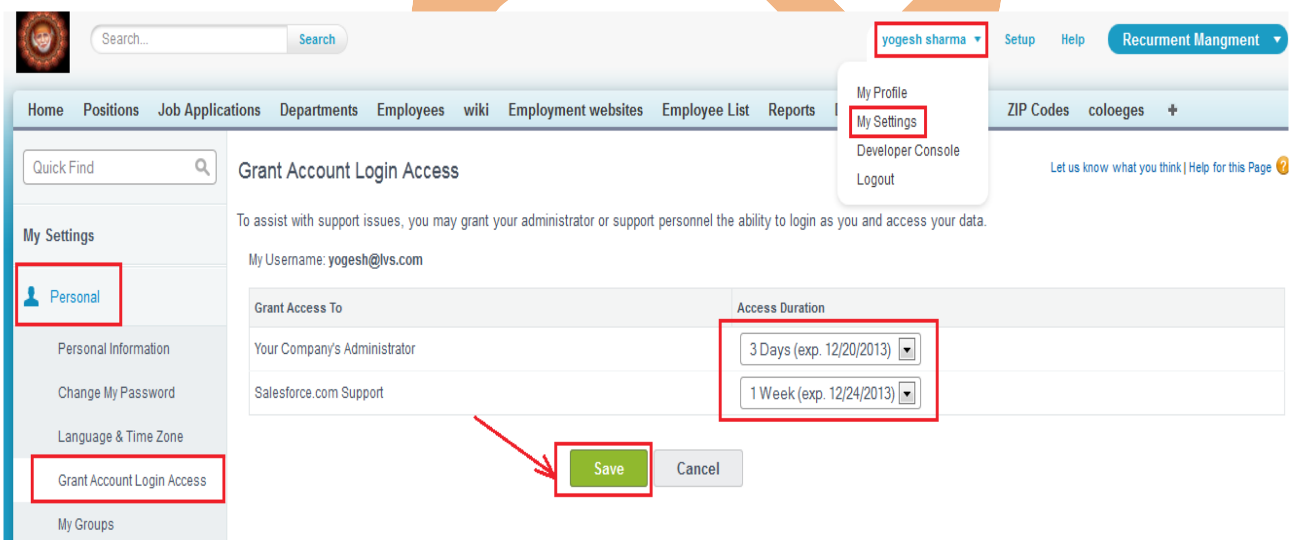
If you are out of mobile verification and have not added a time based token, this is the default option. Click Email me a verification code when prompted during login. SalesForce sends an activation email to the email address specified on your user detail page.

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 :

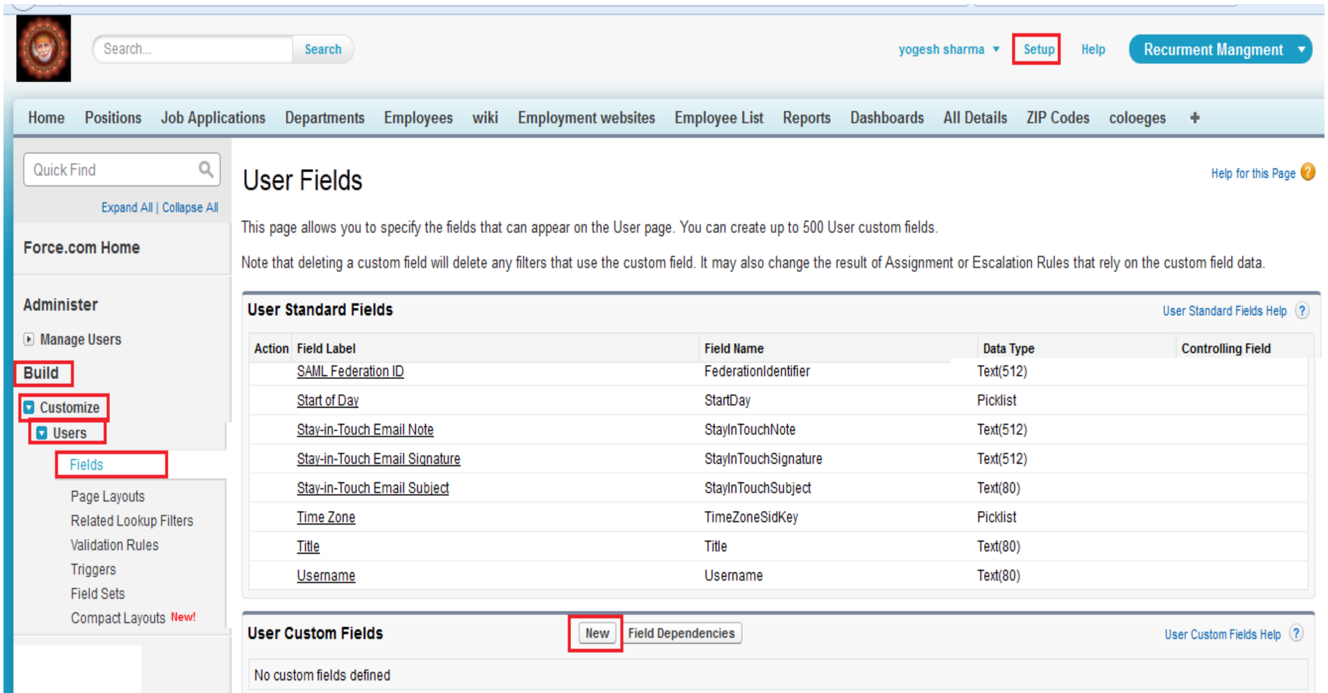
There are many occasions when it is useful for you to log in as one of the users in your organization.
To assist you, your administrator or a customer support representative may need to log in to the application using your login. You can grant access to them for a specified duration. For security reasons.

How to Set Grant Login Access :
Setup > **My Setting** > **Personal** > **Grant Account Login Access.**

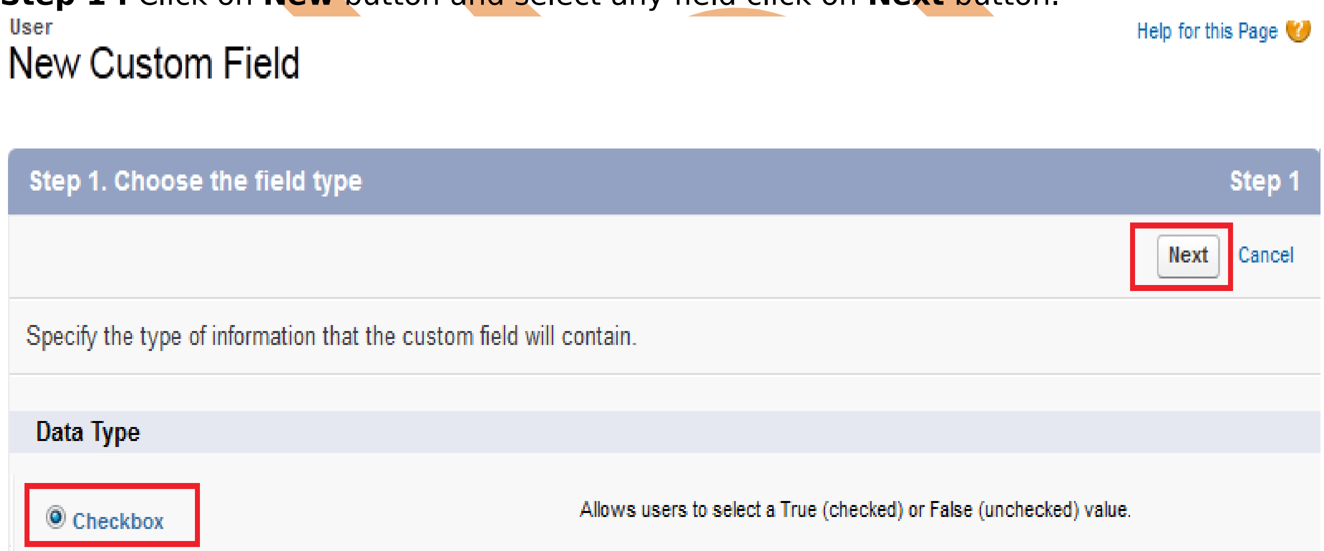


Creating custom user fields in SAlesForce.com :

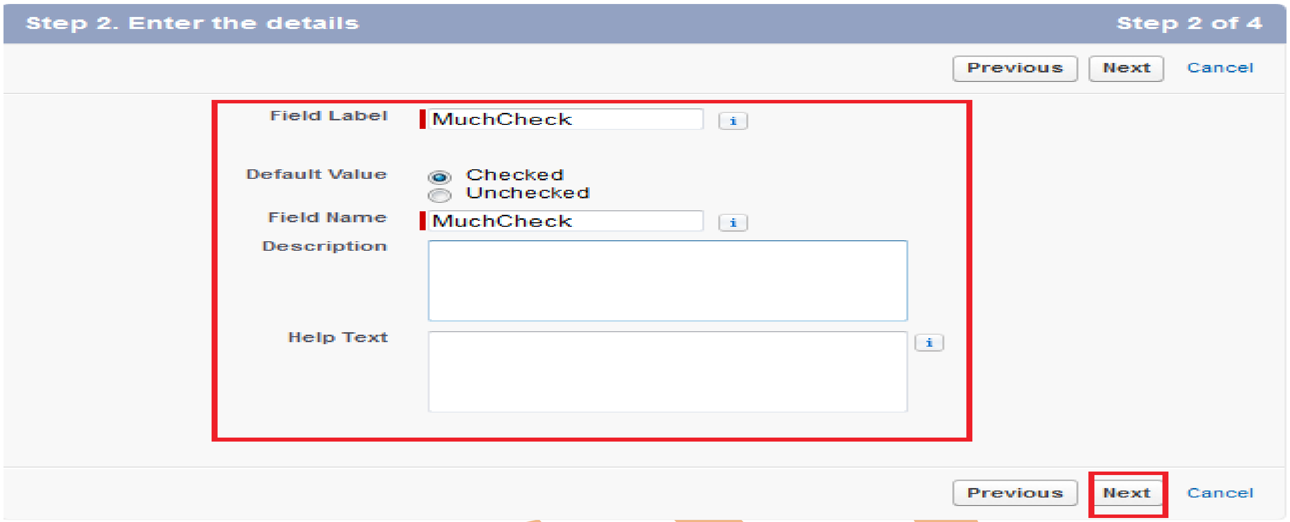
You can create custom fields for users and set custom links that appear on the user detail page.
How To Create Custom Fields :
Setup > **App Setup** > **Customize** > **Users** > **Fields**, Then scroll down to the User Custom Fields section:



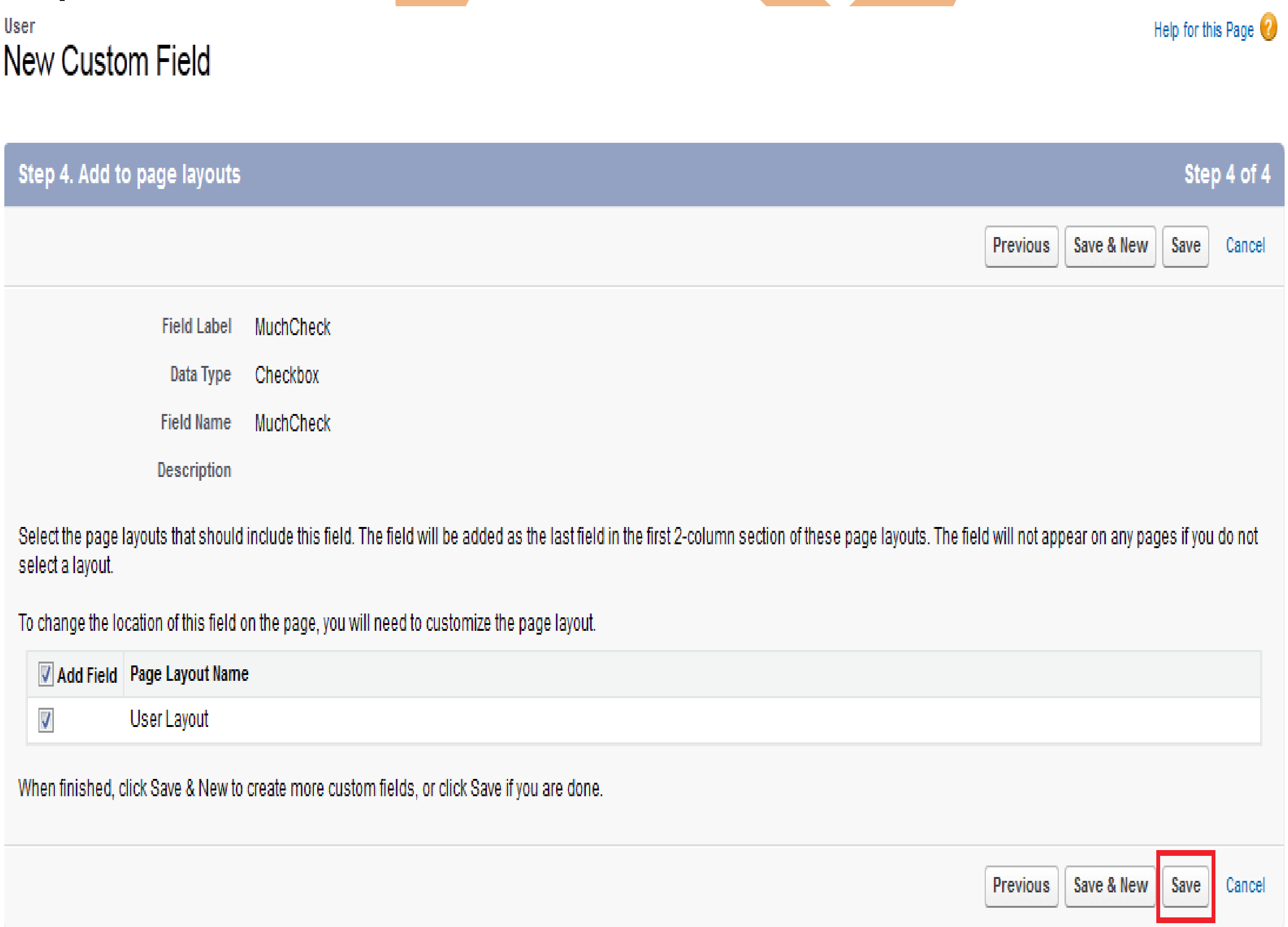
Step 1 : Click on **New** button and select any field click on **Next** button.



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



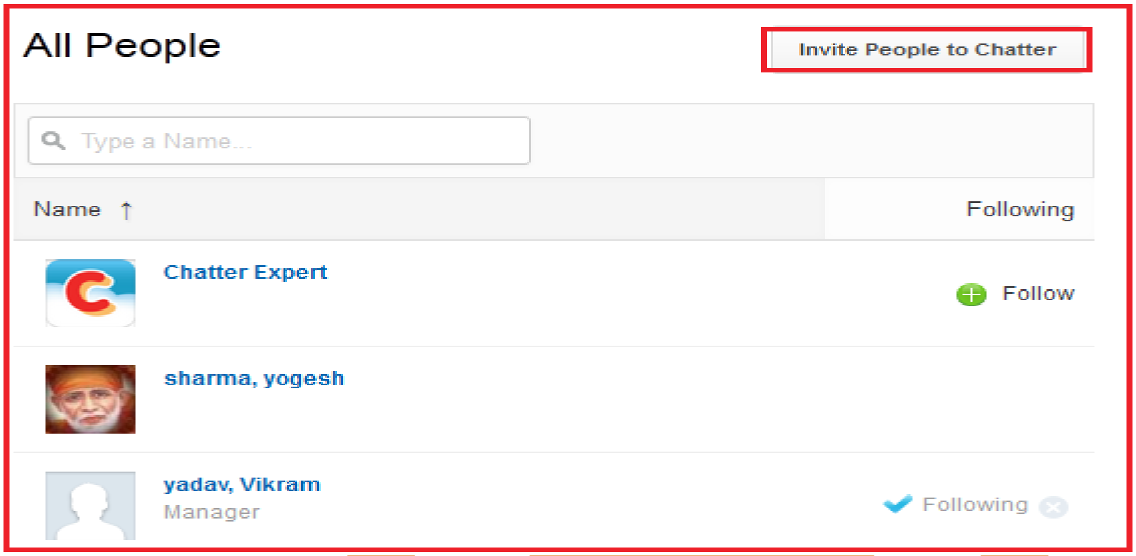
Step 3 : Click on Next button.
Step 4 : Click on **Save** button.



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.

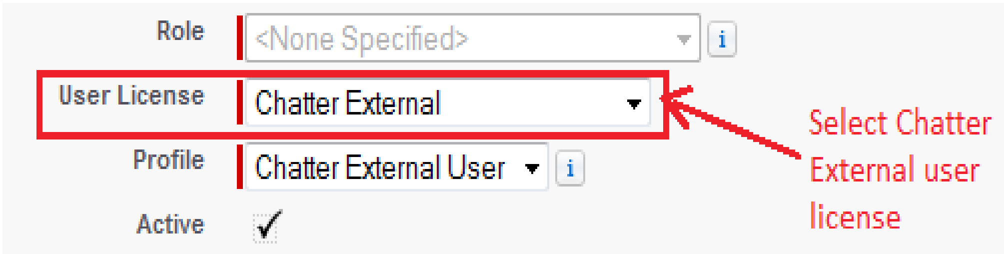
3. Turn on invitations

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.



After then click on **Save** button.

Deferent between Chatter Free and Chatter external users :

Chatter Free	Chatter external
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.	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.

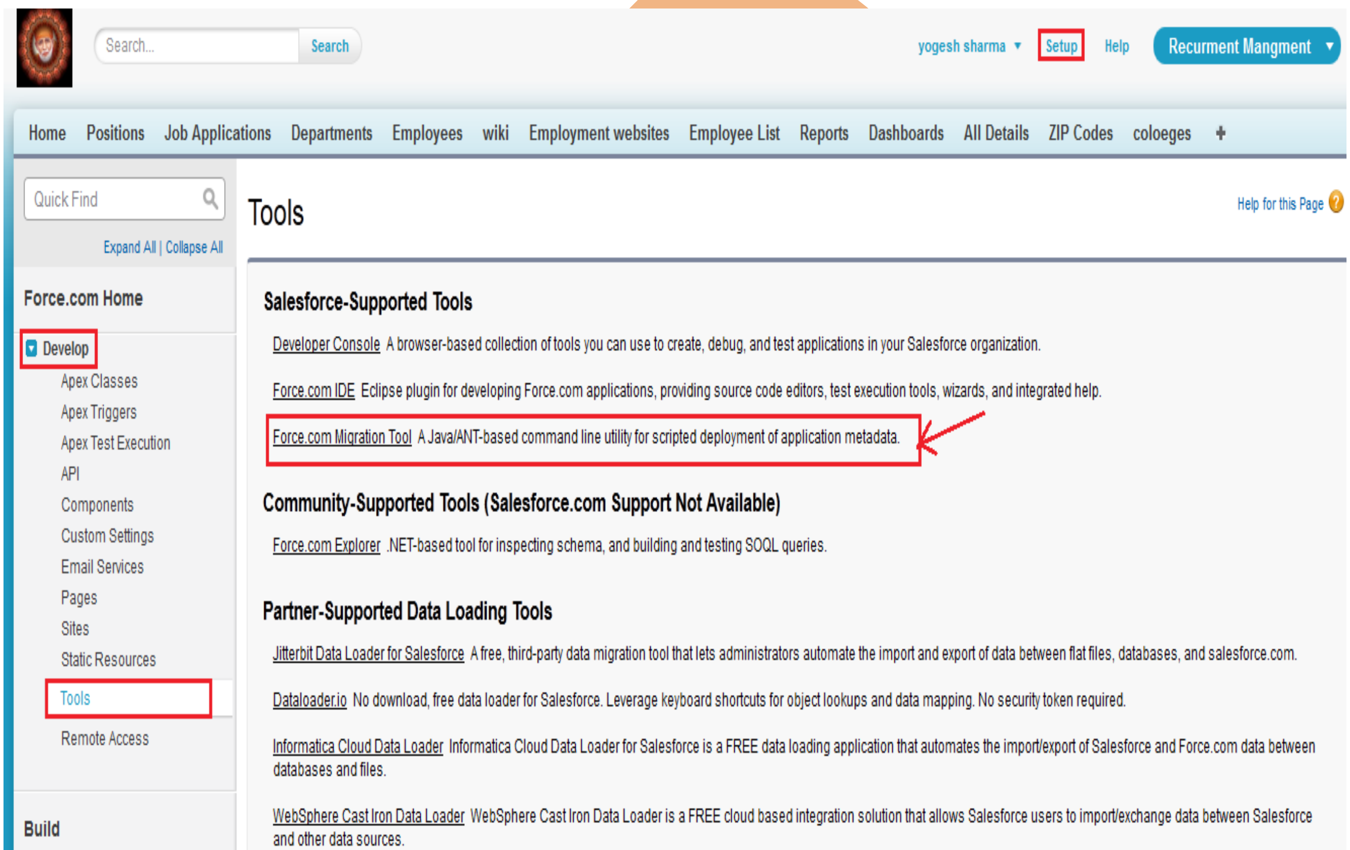
User Migration

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**



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 follwing 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:

```
# build.properties
#

# Specify the login credentials for the desired Salesforce organization
sf.username = <https://login.salesforce.com/>
sf.password = <wite heare password>
#sf.pkgName = <Insert comma separated package names to be retrieved>
#sf.zipFile = <Insert path of the zipfile to be retrieved>
#sf.metadataType = <Insert metadata type name for which listMetadata or bulkRetrieve operations are to be performed>

# Use 'https://login.salesforce.com' for production or developer edition (the default if not specified).
# Use 'https://test.salesforce.com for sandbox.
sf.serverurl =https://test.salesforce.com

sf.maxPoll = 20
# If your network requires an HTTP proxy, see http://ant.apache.org/manual/proxy.html for configuration.
#
```

With Token

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.

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

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

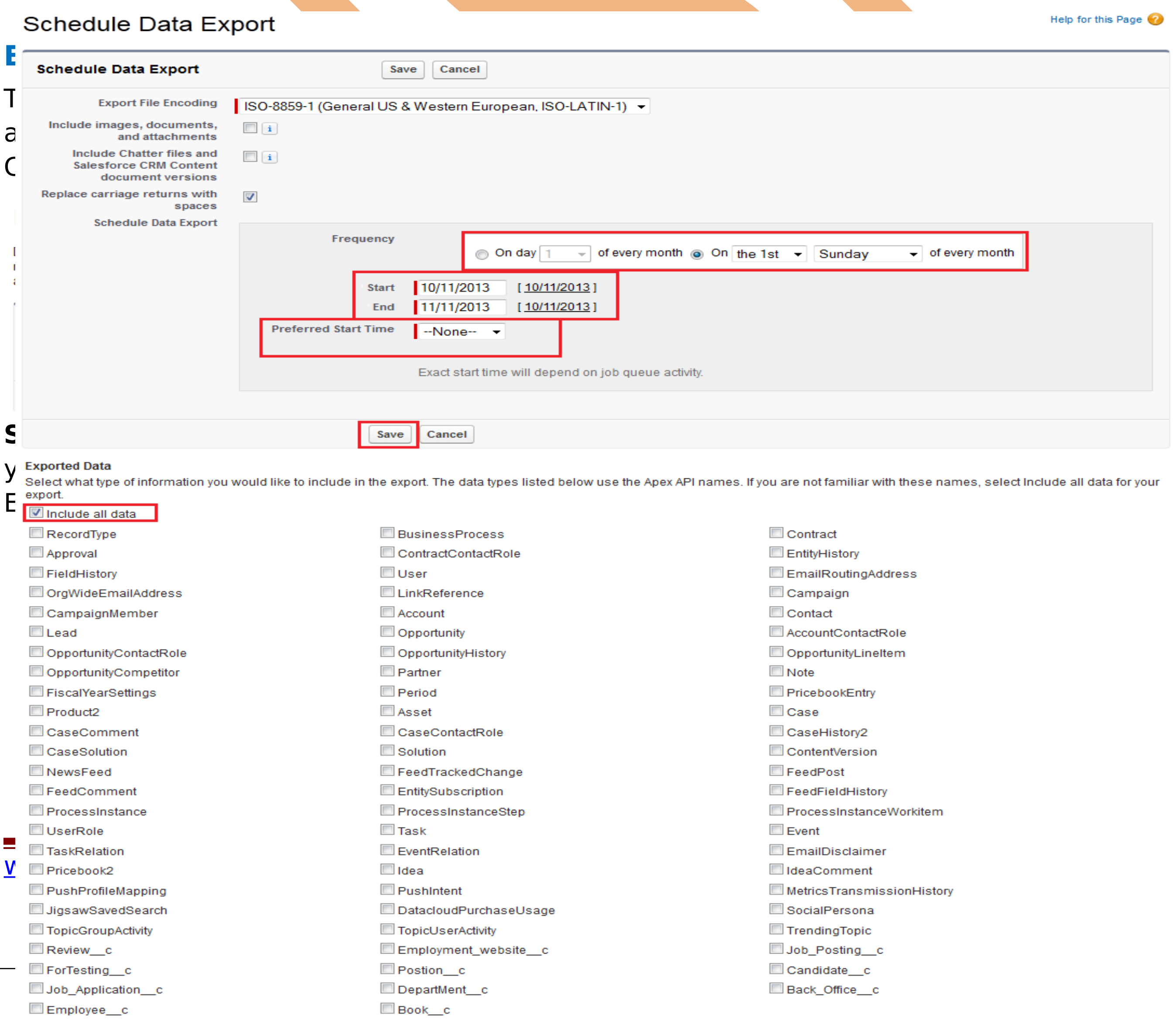
User/Group Backup :

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.

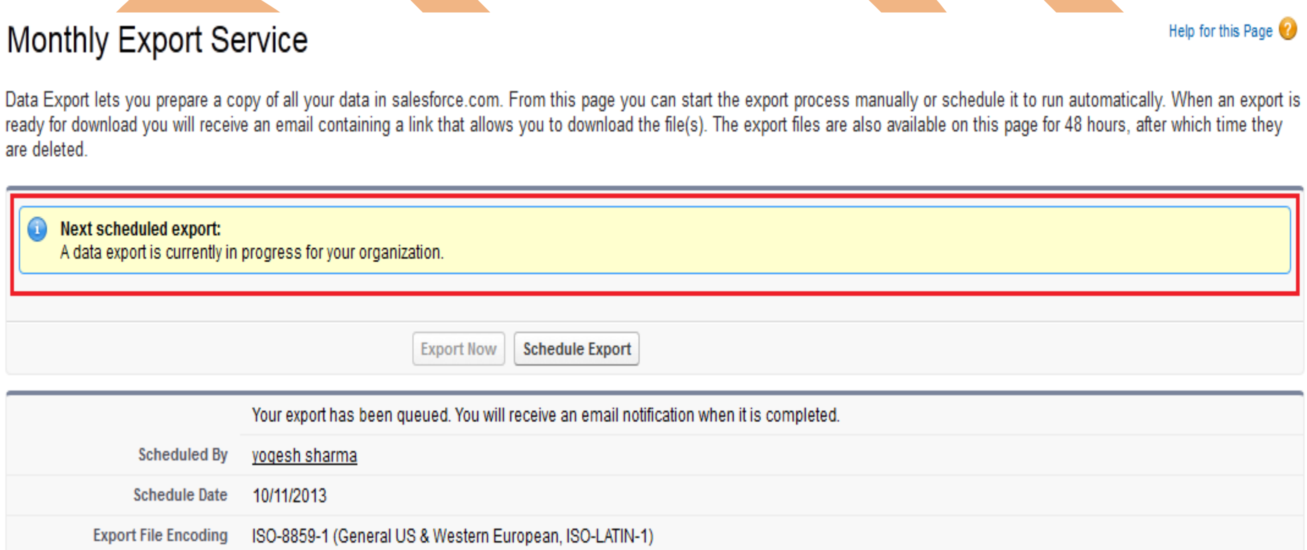
How to take Export data in SalesForce :

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

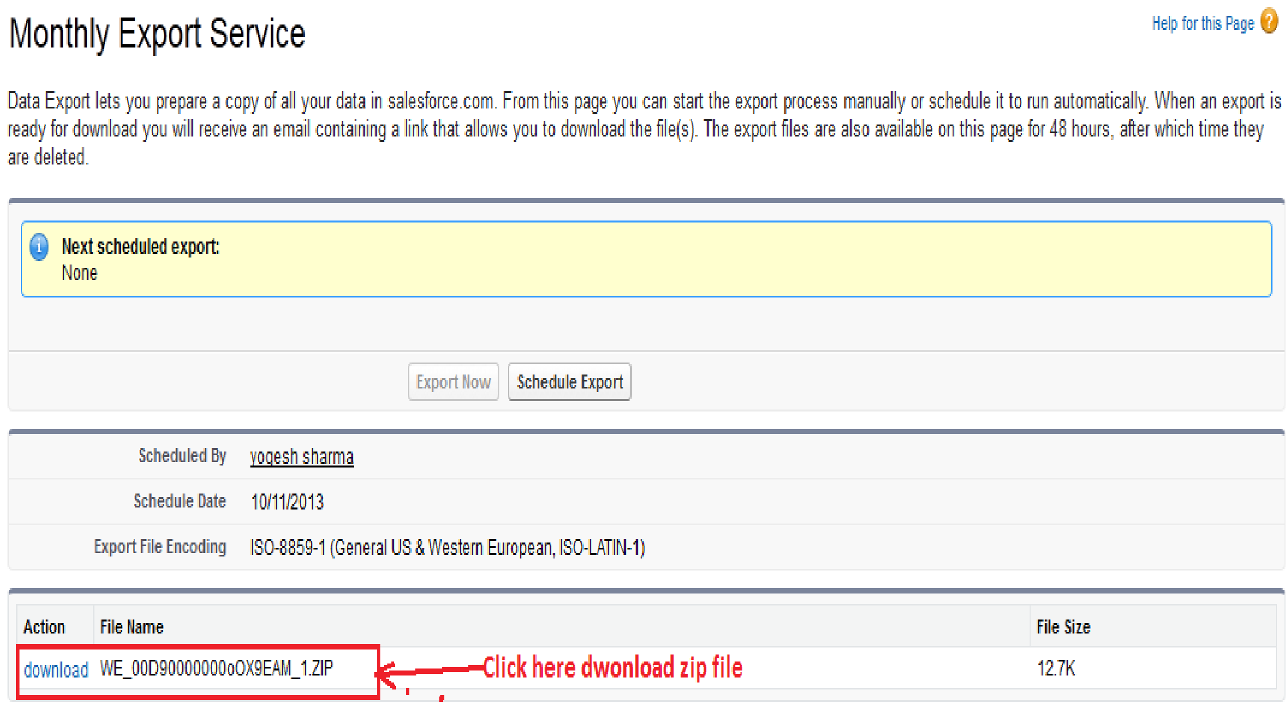
After click on **Data Export** you can see new page there is two option is available **Export Now** and **Schedule Export** you can see below.



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.

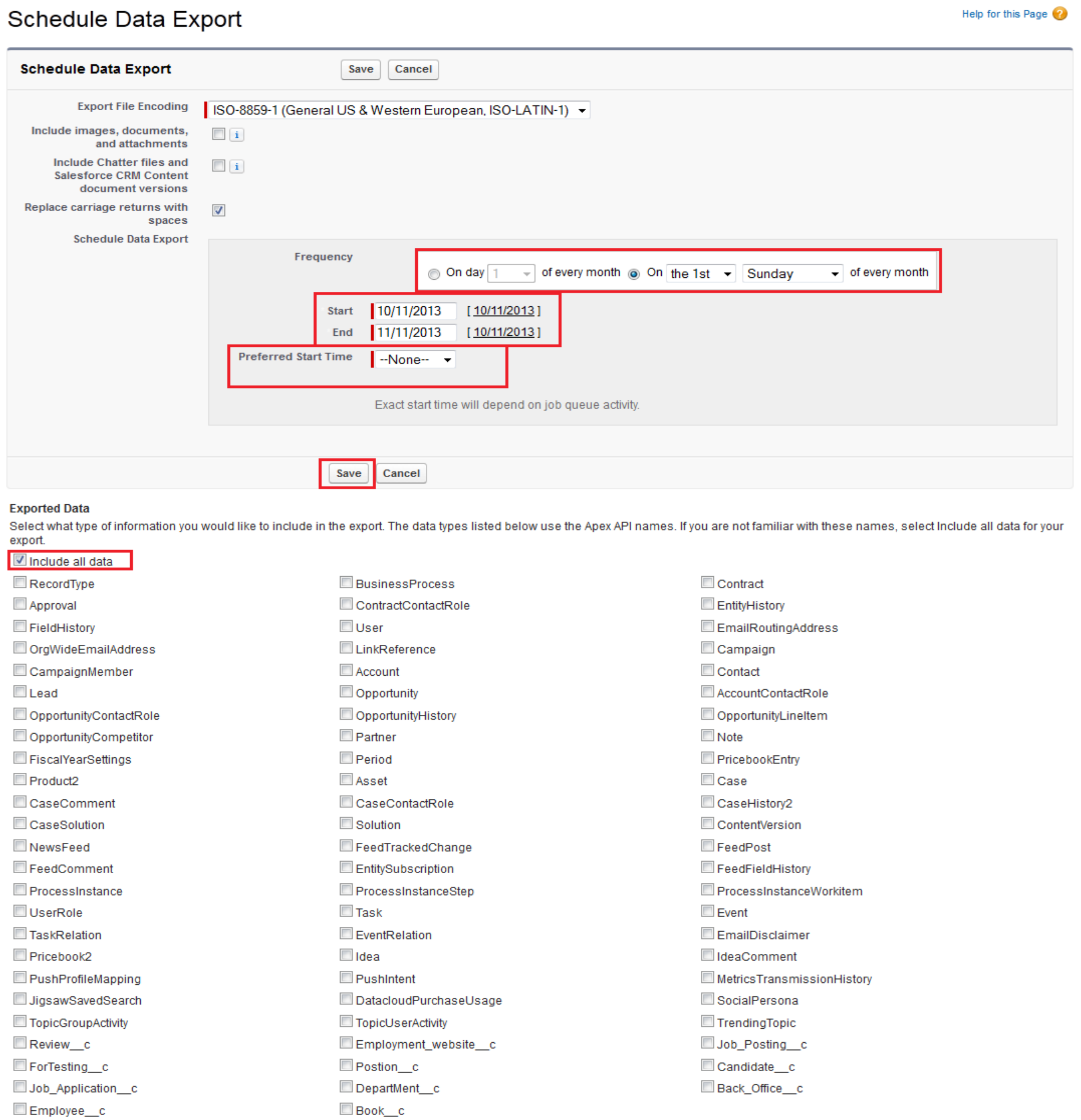


Step 3 :
After that you can Refresh your page you can see that link available on page click to given below link and download export data. downloaded file is available in zip folder.

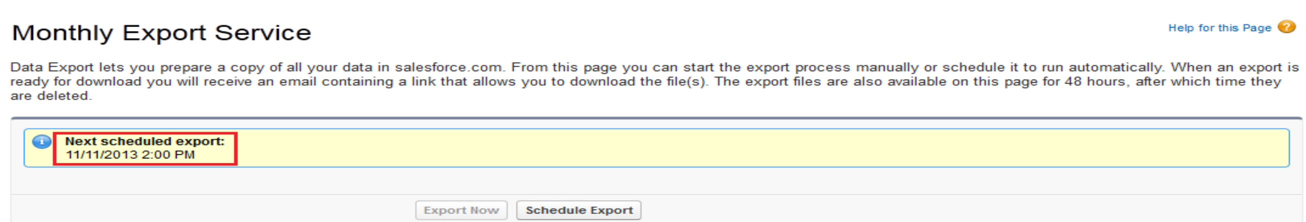


Schedule Export in SalesForce:

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.



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.



User/Group Recover By using Backup :

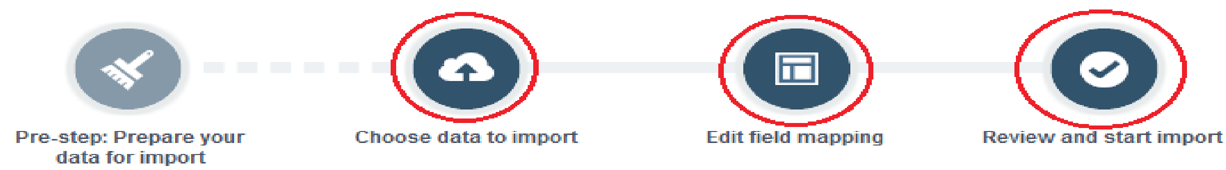
Using Import Wizard :

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,

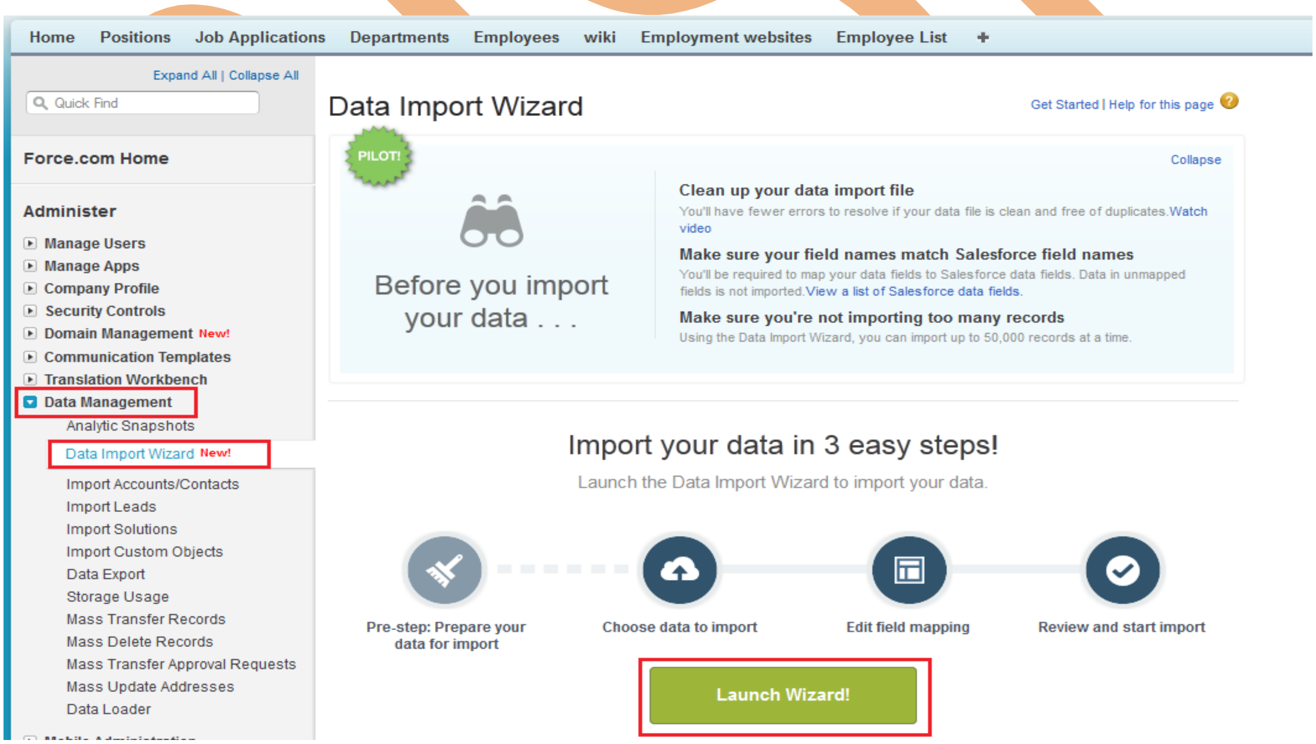
solutions, leads, contacts, and including accounts. The wizard also lets you import custom objects.

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 <u>Launch Wizard!</u> 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

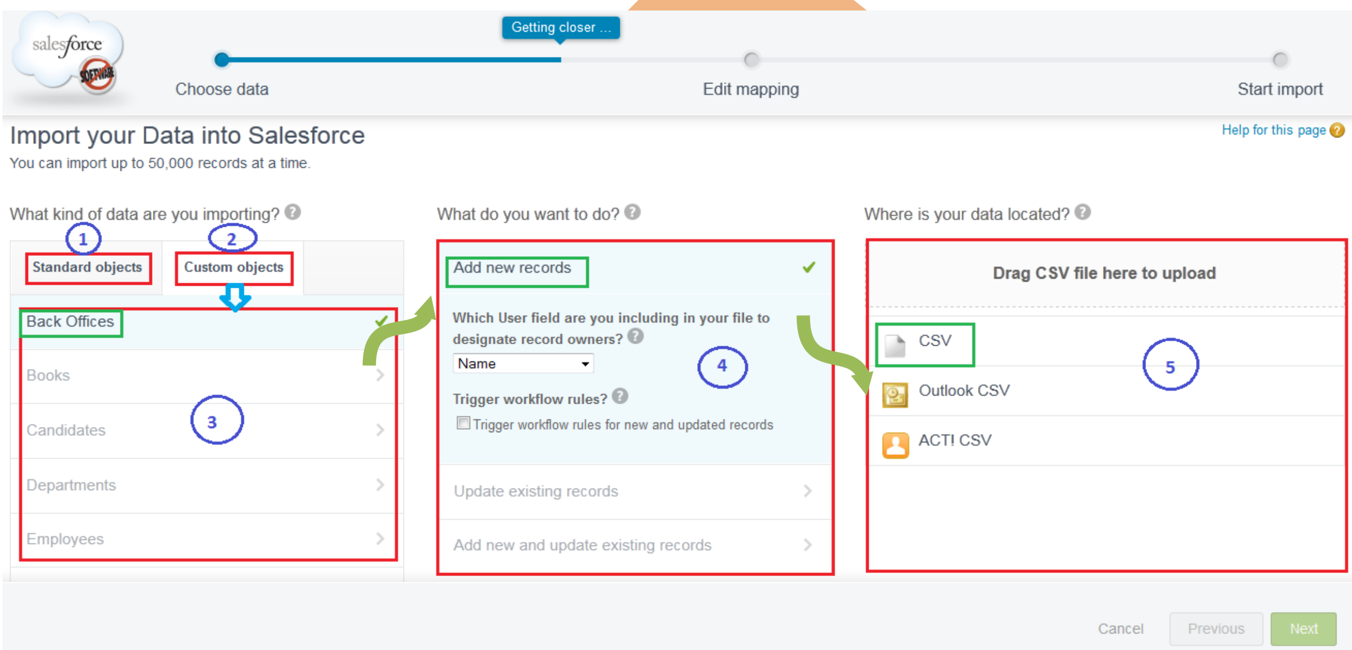
3. choose custom tab anyone.

- After click on Custom Tab then you can see new list

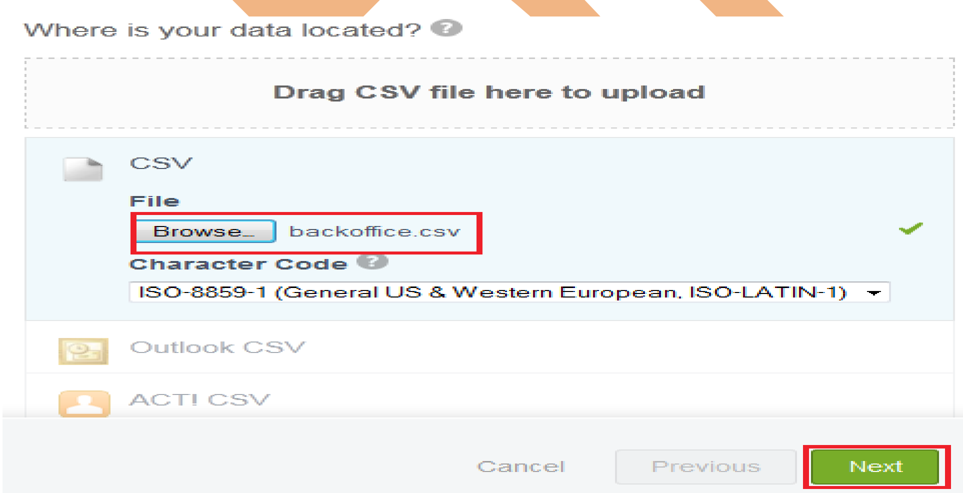
4. there is three option select any one, (For ex :- I will select Add new Record)

- 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)

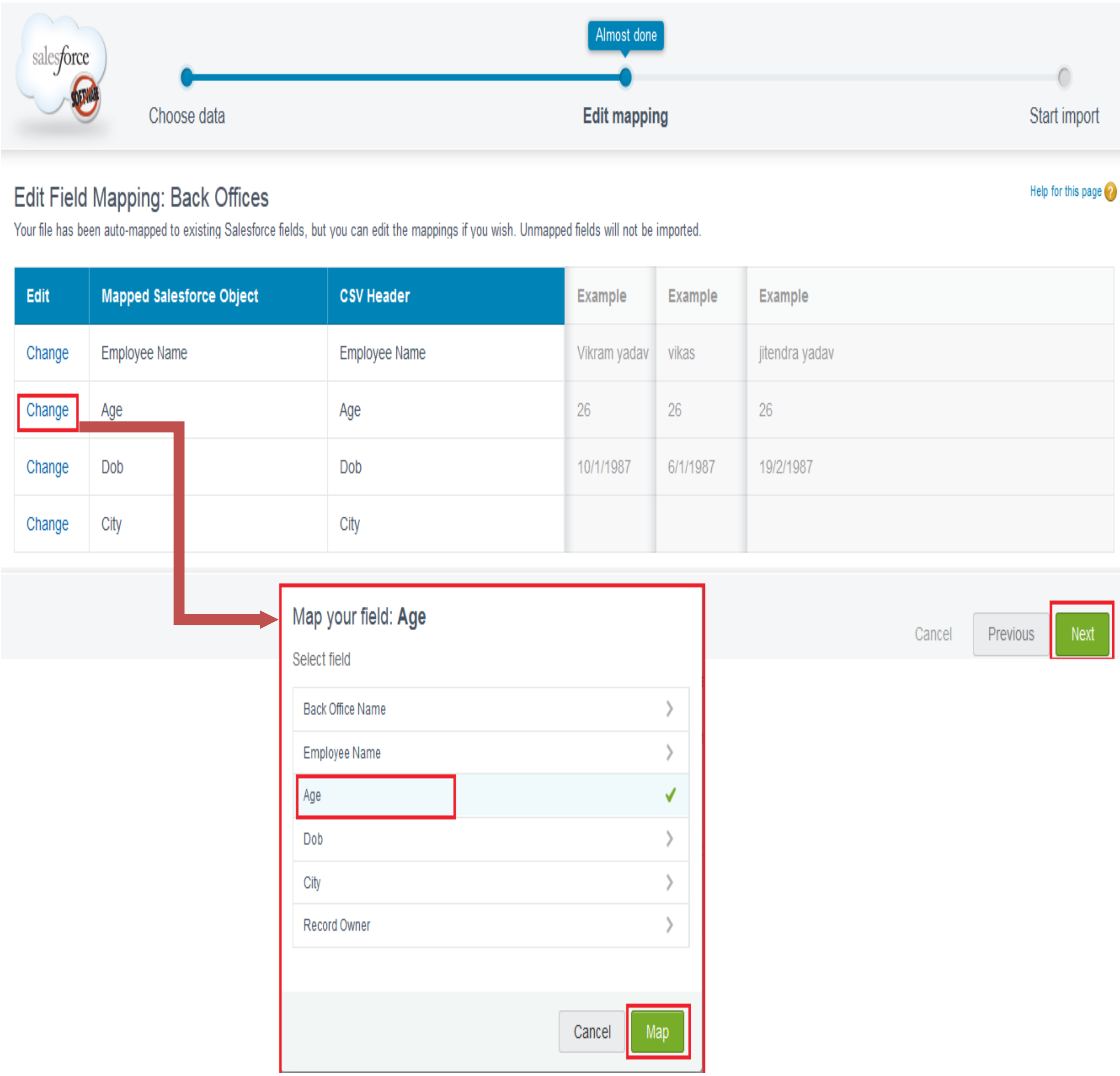


Then select CSV option and click to **Browse** button and select your .CSV file. and click to **Next** button.

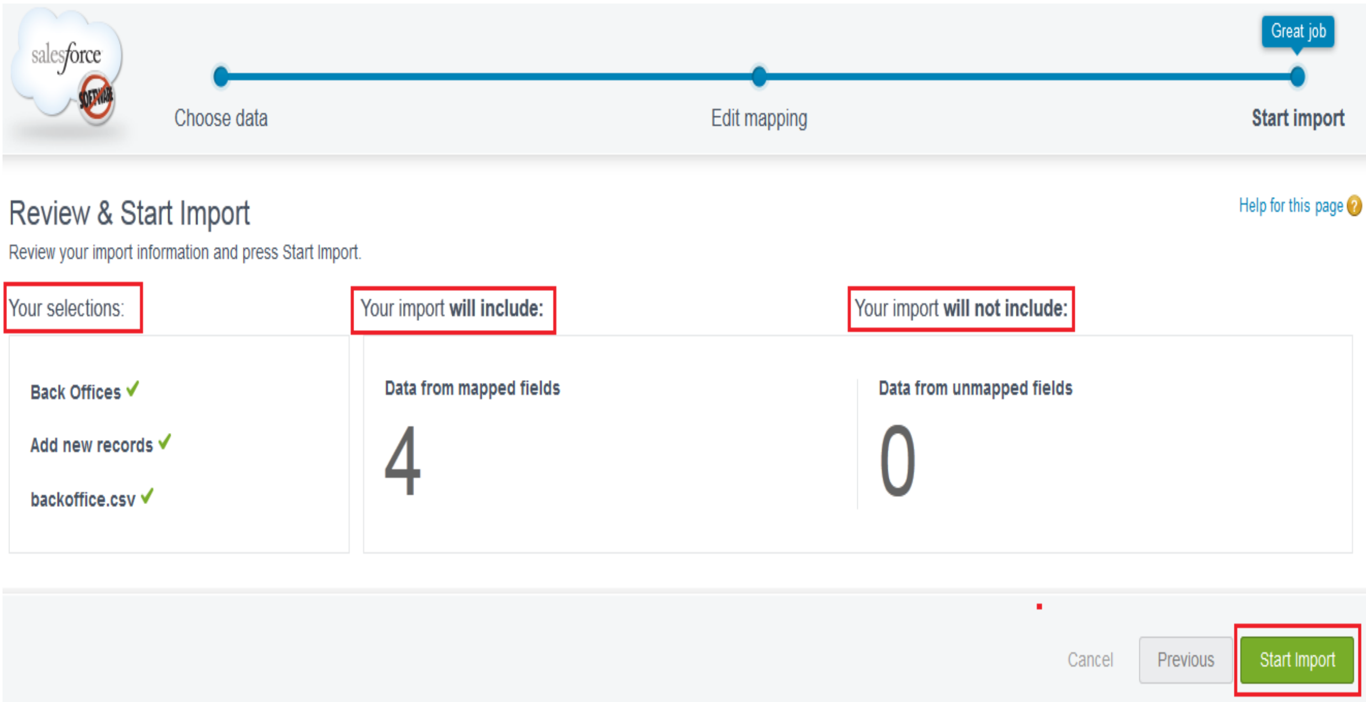


Step 2 :

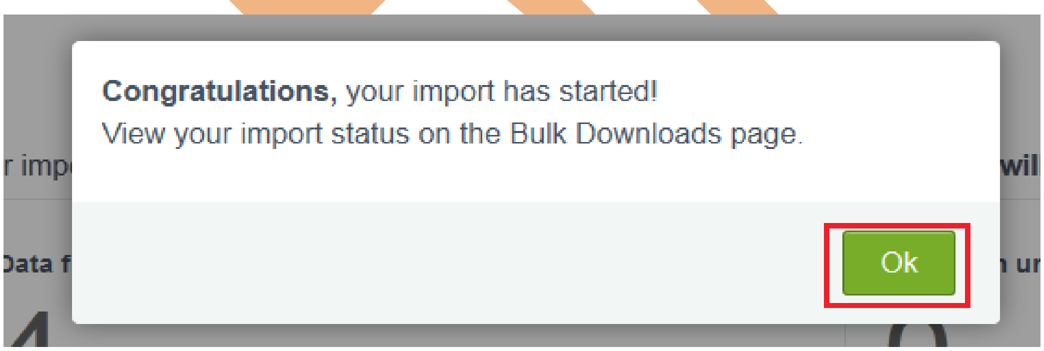
After Click to Next button Then you can see new page it called **Edit Mapping** page, if you want to mapped your fields ,if need to change mapped field click on **Change** link after that open new pop box select your mapped field and click to **map** button. Then you click on **Next** Button.



Step 3 :
After that you can see, your selections list, your import will include, and mapping list. After then click on **Start import** button.



Step 4 :
After Click on Start import button then you can see Message box click on Ok button



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.

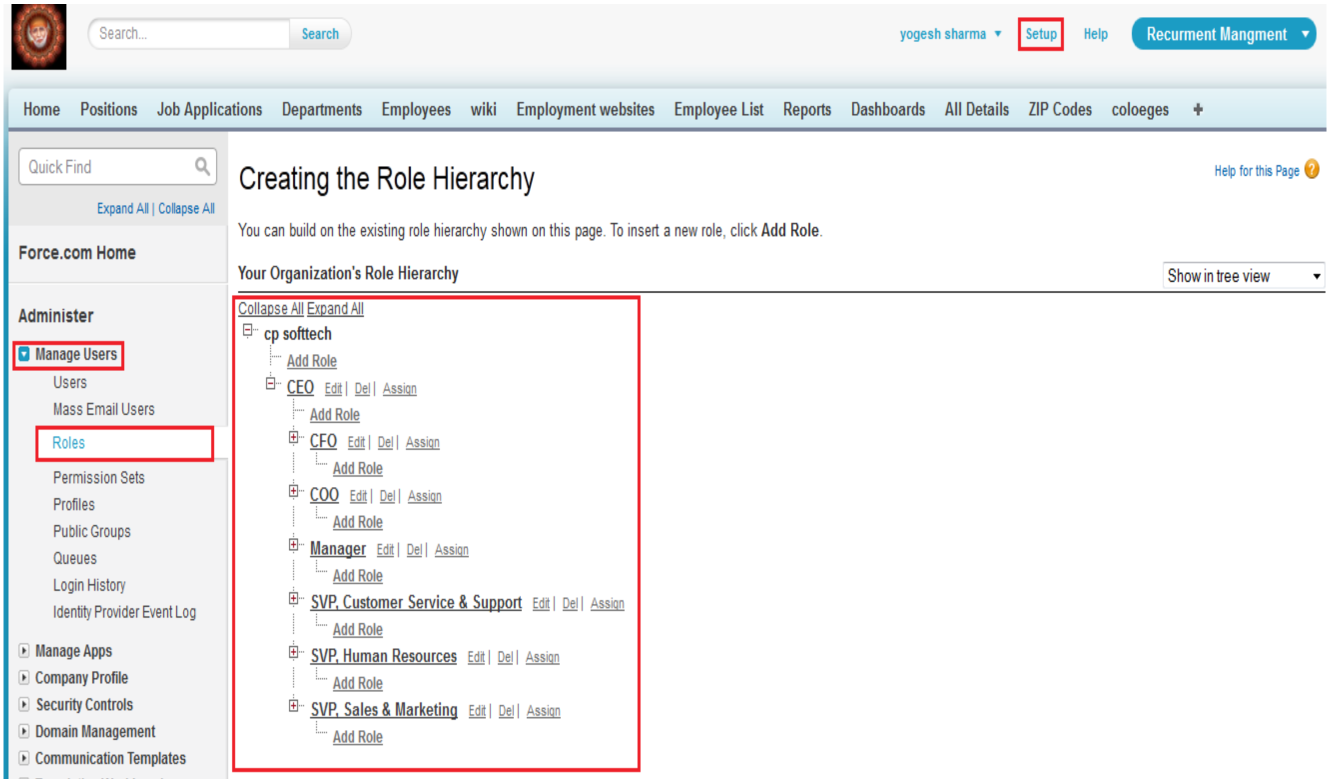
Predefined roles/privileges

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**.



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 mange all organization data, define role etc.