

Ranjith Krishnan

SESSION 13

Users

- A user is anyone who logs in to Salesforce.
- Users may be employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records.
- Users may be customers who will have access to your org.

To login into salesforce org, every users must be assigned with followings

1. User License
2. Profile
3. Roles (Optional)

What is User License

A user license determines which features the user can access in Salesforce. For example, you can allow users access to standard Salesforce features and Chatter with the standard Salesforce license. But, if you want to grant a user access to only some features in Salesforce, you have a host of licenses to choose from. For example, if you have to grant a user access to Chatter without allowing them to see any data in Salesforce, you can give them a Chatter Free license.

What is Profile?

Profiles determine what users can do in Salesforce.

What are Roles

Roles determine what users can see in Salesforce based on where they are located in the role hierarchy. User at any level can view, edit all data that's owned by or shared with users below them in their role hierarchy.

How to add new user?

Classic:

Setup

|--->Administer
 |--->Manager Users
 |---> Users
 |--->New User

Lightning:

Setup

|---> Administration
 |---> User
 |---> Users
 |---> New User

Step 1: Enter required fields

FirstName, LastName, username, alias name, Email

Step 2: Select the Role

Step 3: Select the license

Step 4: Select Profile

Step 5: Save

Note: Once the user is created, we CAN NOT delete the user.

Use Case: (provide the email ids of your choice for below users)

SNo	Name	User Name	License	Profile
1	Robert Bob	Bob@ranjithbatch105.com	Salesforce	System Administrator
2	David John	David@ranjithbatch105.com	Salesforce Platform	Standard Platform User

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Note: User can self de-activate the user account without requesting admin to do this.

Navigation:

Setup

|---> Administer

|---> Manage users

|---> User Management Settings

|---> Self De-Activate

How to disable user account to login into salesforce?

Two ways

- i. Freeze the user
- ii. Deactivate the user

Difference between Freeze and Deactivation

SNo	Freeze the User	Deactivate the User
1	This is done by click on the button 'Freeze' in details of any user.	This is done by uncheck the check box 'Active' in edit page of any user.
2	Once freeze the user, the user will not be able to login to his account	Once uncheck the active check box, the user will not be able to login to his account
3	License assigned to user will remain assigned to the user even after the freeze	License assigned to the user will now be released back to organization

How to restrict users at profile level to login within particular IP Ranges?

1. This will specify range of IP address from which user can login to his/her account.
2. This can be defined at the profile level.
3. Navigation:

Setup

|---> Administer

|---> Manage Users

|---> Profiles

|---> Choose the profile

|---> IP Ranges

Step 1: Specify the range of IP address

Step 2: Save

Note: To enable the user with particular profile into any IP range without verification challenge check, give the IP range as 0.0.0.0 and 255.255.255.255

How to restrict users at profile level to login within time ranges?

1. This will specify during which hours in the calendar user can login to his account.
2. This is used to control the logins at the profile level.
3. Navigation:

Setup

|---> Administer

|---> Manage Users

|---> Profiles

|---> Choose the profile

|---> Login Hours

|---> Edit

Step 1: Day wise set the Login Hours for user

Step 2: save

How to set the maximum number of invalid attempts allowed for a profile? Beyond this, the user id will be locked.

- a. Navigation:

Setup

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|---> Administer
 |---> Manage Users
 |---> Profiles
 |--->Profile Name
 |--->Edit

Step 1. Choose maximum Invalid Attempts

Step 2. Choose the lockout period

How could an admin unlock the user account after exceeded the limits of invalid attempts?

There are 2 ways

- a. Reset the password
- b. Unlock the user.

Business Hours:

1. These are the days and hours during which your support team is available.
2. We can set the business hours at organization level

3. Navigation

Setup
 |--->Administer
 |--->Company Profile
 |--->Business Hours
 |--->Edit

Step 1: Choose the time zone

Step 2: Choose the Business Hours and Days.

Usecase:

Set the Business hours for organization:

Time zone	: IST 5:30 (Asia)
Monday	: 8:00 AM to 6:00PM
Tuesday	: 24 Hours
Wednesday	: 24 Hours
Thursday	: 10 AM to 10 PM
Friday	: 24 Hours
Saturday	: 24 Hours
Sunday	: leave blank (Note: Blank indicates the holiday)

Trusted IP Ranges under Network Access

When login into salesforce using external interfaces, Salesforce would request username ,password, verification code or security Token for granting access. To avoid this 5 digit verification code, set the Trusted IP ranges.

1. Setting trusted IP ranges under Setup | Security | Network Access
2. Now if you are connecting from a trusted network, it will grant access using username and password without verification code..
3. If you login from external user interface, the security token is not required to login.

Navigation:

Setup
 |--->Administer
 |--->Security Controllers
 |--->Network Access
 |--->Set the IP Address

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Login History:

Note: Admin can track the login issues related to the user from Login History.

Setup

|--->Administer

|--->Manage Users

|--->Login History

Q:: Which permissions are required to manage the users?

To view and manage the users, profile should have the below permission:

View Setup and Configuration

Others permissions:

Permissions Required in Profile	What user can do with this permission?
Manage Roles	This permission is to create/edit/Delete roles
Manage Profiles and Permission set	This permission is to create/Edit/Delete profiles
Manage Password Policies	This permission is to change the password policies
Manage Login Access Policies	This permission is to control who can login
Manage IP Addresses	This permission is to create /Edit/Delete IP restrictions
ResetPasword and unlock users	This permission is unlock the user or reset the password
Manage Internal Users	This permission is used to create/Edit/Delete Internal user
Manage users	This permission is used to create/Edit/Delete both internal and external users
Manage Business Hours Holidays	Users with permission can create /edit business hours
Customize Application	To Create Apps , Object, Fields, Tabs or Visualforce Page, workflow and Approval process

Password Policies:

- This will specify the rules of your password like
 - Minimum Length of password
 - Password format
 - Security Question to reset you password
 - How many old passwords should be remembered?
 - your new password cannot be your last three passwords
 - Password expiry time.
- Navigation:** Setting password policies for all users in the Organization

Setup

|--- Administer

|---Security Controls

|---Password Policies