

Section 3 - User Setup

Lecture - User Setup

In this section we will be covering how to identify the steps to setup and maintaining a user, as well as if given a scenario being able to troubleshoot common user access invisibility issues. These are the two primary things you need to know according to the exam outline in the study guide.

Without further ado, the way to get into the user setup is by way of this setup menu to the right of your name in your developer account. You should see a Setup link. Click on it and that brings you back to the setup view, which you are hopefully familiar with by this time. And once again in order to quickly find what you are looking for, you can search for a keyword. But if you will notice the first link under the Administer section here at the top of the Setup menu is Manage Users. I'm going to click this arrow here to expand the Manage Users section and you'll see the different functionality you can do under the Manage Users section is you can Manage Users, you can look at Adoption Management (that has to do with user adoption of Salesforce), you can Mass Email Users, and this is also where you set up Roles, Permission Sets, Profiles, all of which we will be covering later on in this course, as well as Public Groups, Queues, and Login History.

To manage existing users, to add new users, or to deactivate existing users in your Salesforce instance, you click on the Users link under Manage Users, and that brings you to a list of the users that are currently in your Salesforce instance.

So I've previously created a user account called John Doe for an example here just so that I would have an additional user other than my own which is down here at the bottom. And so you notice as well, there's a few other user records that are active on the platform right now and these go beyond the scope of this course and they're there by default. And if you're following along in your own Salesforce account, you'll see similar users and you'll notice as well, this active column shows which users in your Salesforce instance are active. So my example here of John Doe is no longer active in my Salesforce instance. And then as well you'll see my own user account and that I am active.

So if I wanted to go in and view a user record and just go in View Only mode, I would click on this link here {User's name. Example: Doe, John} and this would take me to the user detail page. A very common thing across Salesforce are these edit links that appear to the left. And if you wanted to go in and edit a user record you would click on Edit. So let's view the user detail for my own user account. And something that I want to highlight here has to do with the login history for a user. And you notice here we got these hover over links available on the user detail screen and you can hover over these and it brings up the various related lists for these various links and then the number as well to show you quickly if there's any records related to that related list. So most of these have zero here. But I do have a couple of instances where I've



logged into Salesforce. And so this takes me to my login history and you can also download six months of login history here for your entire org and that exports to a csv file.

Login History And Troubleshooting Login Problems

Now I want to highlight login history because you will often have users reporting to you as an administrator that they cannot login to Salesforce. And so one of the first things that you would want to do is to check the login history on their user record. If it shows that they've been successful in logging into Salesforce and you don't see that their account has been locked out or they've had unsuccessful attempts, then that means one of two things. It means that they're either with using the incorrect user name, and they're not logging under the correct user name that they've been assigned, or they're logging into the wrong location.

An example would be that they're trying to log into a production instance of Salesforce but instead of typing in login.salesforce.com in their browser url section address, they've typed in something like test.salesforce.com, which would be the login that you would use for a sandbox instance. And just so keep in mind and bear in mind that the login history that's tied to a user account has to do with their username and it's tied to the username they've been assigned to. And so if they're saying they're not able to login or it's saying that they're locked out and you don't see anything in the login history, you need to verify where they're trying to login to and what username they're using. ***And so that's important, because if you bear in mind in the study guide, one of the criteria under the exam outline in section 5 says that "Given a scenario, troubleshoot common user access invisibility issues" and so as it relates to user access, this login history is very important.***

Editing a User Record

The other item under User Setup relates to identifying the steps to setup and maintain a user. And so I mentioned previously that you can edit a user record. What I'm going to do here is I'm going to add additional feature licenses to my user account. And so now that I'm in Edit Mode, I can select additional feature licenses. I'm going to say that I'm a [Site.com](https://www.site.com) Contributor User, and a [Site.com](https://www.site.com) Publisher User. ****Site.com** is an external website solution that Salesforce provides to where you can expose your Salesforce data to outside users. You'll want to set security around what you want to expose and that sort of thing. And [Site.com](https://www.site.com) is not on the Admin Certification Exam as far as I'm aware.** But I just wanted to show how you can assign different feature licenses or take away feature licenses from a user. So the this is how you can edit a user account. When you're done you can click Save.

Creating a New User

So I'm going to go back to the Users section to see what users I have in my instance. I've got these various user accounts and so let's say we need to create a new user account. You click



on New User and you enter in the name information for the new user. Their alias defaults to first initial and then the last name, with so many character limit. You enter in their email address. And I'm just using a fake email address right now for demo purposes. It defaults their username as their email address that you've entered. You can change that username to anything you like, it just needs to be in the form of an email address. You can enter in Title and Company, Department and Division. And then here's where you assign the role of the new user. I'm going to put Jim Doe on the marketing team with the User License of Salesforce. We are going to keep that the default. And for Profile, we are going to assign them a custom profile called Marketing Profile, and this list of profiles are the default lists of profiles that come standard in a free Salesforce developer account. And so you can create additional custom profiles. And I want to assign this user the Marketing User Feature License, and you can also assign the other feature licenses as well.

Scrolling down, and can enter their mailing address and other information such as the time zone they are in, their locale and their language if they wanted a different language for their Salesforce instance to be localized to when they're logged in they can see other languages here. I'm going to keep this as English for now. There's also approver settings that have to do with approval processes. We will go into that later. And then you can also specify if you want them to receive the Salesforce Newsletter and if you want them to receive the Administrator Newsletter. And these are things that Salesforce sends out sporadically. And if they're not an administrator, don't check for them to receive the Administrator Newsletter because that won't be relevant. And then with this checked, "Generate new password and notify user immediately", once you click Save, they'll receive an email that shows that they now have a Salesforce user account and a link in that email, if the click it, it will take them into Salesforce to where they can set their password. So you'll notice here now that Jim is an active user and he has his feature license of a Marketing User.

So I wanted to show a few of these buttons here that are important that'll come into play as you're administering on the platform. We showed previously how to edit a user record by clicking Edit. There's also a sharing button and that has to do with sharing settings and that's not used so much necessarily with user records, but you'll get involved with sharing as it relates to other types of records, usually such as accounts or contacts or opportunities. We'll go into more related to sharing settings in a later lecture.

Resetting Passwords

The things that will really come into play for you as an administrator are these two buttons here, the "Reset Password" and the "Freeze Button". Now the Reset Password button is pretty straight forward in that we mentioned previously if a user is reporting that they're unable to login to Salesforce and they've locked themselves out of the account, and if you look at their login history and you see that they indeed do have failed attempts, you can reset password by clicking Reset Password. You get prompted "Are you sure you want to reset the password for



this user?" you click OK. And then "A new password for the following user has been sent via email." And so the user will be required to enter a new password upon initial login to Salesforce. You can, in addition to clicking the Reset Password button, what I prefer personally is clicking Edit, and this is just a helpful tip, and at the very bottom, there's this check box to generate new password and notify user immediately.

This is helpful especially if you're resetting a password for a user in a sandbox. And why that is, is because users in a sandbox environment, a lot of times when you first setup a sandbox, they won't have a valid email address in their user record for their user login in a sandbox environment. And so if you just click to reset password, Salesforce attempts to send the email to an invalid email address and they never get the notification. And so what I like to do is to go in and edit the user record and make sure that we have their valid email address here and not like a .dev or a .prod or something for a sandbox name under their email address. So you know that if you check this box at the bottom here to generate new password and notify user immediately, once you click Save, it'll send them the email regarding their password being reset. They can then click through the link in the email to then login to whatever Salesforce instance you've reset their password on and they can set a new password. I know that's kind of confusing but I wanted to show you that there's more than one way to reset the user password.

Freezing a User

So in addition to the Reset Password button, another button that you'll use on user records has to do with freezing a user account. And what that means is you will occasionally need to freeze a user. That is usually someone that's an administrator or someone whose user account is an integral part of the operation of your Salesforce instance. The scenario would be if you have an administrator, or someone that's set up a lot of scheduled reports or dashboard refreshes, or scheduled jobs that are set to happen in a scheduled job queue, those things will error out if you were to just deactivate this user. And so why you would need to deactivate a user is if they were to leave the company. It's a common practice in just the IT world in general that when someone leaves a company, one of the first things you do is you lock out their access to the network so they can't do anything ill advised. And so, in Salesforce you can edit the user record and you can just simply select to uncheck the active checkbox and you'll receive a prompt here saying "Deactivating removes them from all delegated groups and sharing privileges". And so it also talks about removing the user from any teams and that sort of thing before they can be deactivated and you can click Save.

I'm going to cancel out of that though and not deactivate this user quite yet because I want to show you what it's like to freeze a user account. So for example let's say that Jim Doe has been with the company for a long time and instead of him being a Marketing User, let's say he's a System Administrator. Let's say it's his user account that setup the scheduled data exports for a weekly data export and all the dashboards are set to run as his user record. So those are



scheduled to refresh at certain times and that there's emails that are scheduled to be sent at certain times of reports. Those sorts of things will break if a user is deactivated.

And so what you want to do in those scenarios, you can freeze the user account and then go in and reassign any of those scheduled jobs to an active admin type user, so that those jobs will then go out like normal and then once you have all of those scheduled jobs re-assigned to an active admin user, you can then deactivate this user. And so what buys you time in order to do that is clicking the Freeze button. If you freeze a user, then they can no longer login to Salesforce but their user account still remains active. So that way once they're frozen that you know that they can't login, and you can then go in as an administrator and remove them from any sort of scheduled jobs. And so we will see more examples of that when we get into scheduling reports and when we get into the dashboard piece. You'll see more information on running users and that'll begin to gel and make sense as to why certain user accounts are harder to simply deactivate than others and so that's why Salesforce has now given us the ability to freeze a user. And then as well you can even, as you see here, unfreeze a user if you needed to freeze someone out for a time. And so that might be a situation where you have a consultant that helping on your Salesforce instance and rather than deactivating their user account, you just want to lock them out until you got more work for them to do and you want to make sure that they're not working at times that you don't want them to, you can freeze their account and then unfreeze it.

