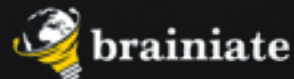




Simplify Your Salesforce Org in 6 Steps

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Part 2 | Users & Roles

Use this workbook to organize your notes while completing this unit

Workbook for Part 2 – Users & Roles

Most Common Problems with User Configuration

Problem #1 – Too Many Salesforce Admins

One of the biggest problems I see in many organizations using Salesforce today is where far too many people are set up as Salesforce System administrators.

Some excuses are:

- › I am the CEO, that's why
- › I need to be able to pull reports and dashboards
- › I need to be able to log calls and meetings
- › I need to be able to see everything

Really?

I have a question for you...the last time you went on an airplane, did you also sit in the cockpit with access to all the same controls as the pilot?

When you go driving in your car, do your other passengers also have a steering wheel and a brake pedal?

No? Why not? Don't you also need to get to the same destination as them?

Let's start off by defining what it means to have System Admin access.

It means that (unless you are experienced)...with just a few clicks you can permanently destroy your organization's database without realizing it.

Inevitably what happens is this...people who are not qualified as System Admins, with the best of intentions...make lots of really stupid, impractical changes to your data architecture...the foundation of your database...with detrimental consequences.

What are the consequences?

Having cluttered screens. Fields that are confusing...let alone duplicated. Having multiple custom tabs with confusing names, getting random error messages anytime you try to change a record. Having so many restrictions and validation rules and required fields that inevitably render the system not usable and your data is worse than it was before.

My point is...System Admin permissions should be given to the fewest number of people possible.

You can pull reports, view all data, log calls, meetings, edit records without having System Admin permissions.

Exercise | Identify your current users with System Administrator permissions and ask “Why should this person be set up as a System Administrator?”

Users with System Administrator permissions	Why is this person set up as a System Administrator?

Problem #2 - Shared Licenses

You know what I'm talking about...sharing a username/password among various members on the team, allowing multiple individuals to log in with the same username and password.

I'm not even going to get into the legalities associated with having shared licenses.

Here are some of the problems you open up by sharing licenses:

- › **You're unable to use Chatter.** Chatter lets you @ mention people, to tag them, ask someone a question, remind a colleague to take action. If you use a shared license, when anyone @ mentions that user, G-d only knows which person is actually going to get that notification. And, I'm sure you've heard of Murphy's Law.The person who gets that email won't bother opening it up to look at it. Let alone, even if they do, when you respond...the person on the other side doesn't know the identity of which person actually replied. Let me ask you - do you also share email accounts, and phone numbers, sending and receiving emails, phone calls and text messages with other people? Yeah...that's a bit nuts.
- › **You're unable to see who was the last person that modified or created anything in Salesforce.** Out of the box, on practically every record you have 2 system generated fields: "Created by" and "Last Modified by" ...if you're sharing licenses with other people, your guess is as good as mine to try and figure out who, among the various people sharing a login was the actual person who created or last modified that record.
- › **You're unable to assign tasks.** How do you assign tasks to a shared user, when anyone else logging in to that account sees all the same tasks assigned to them?
- › **Your metrics are useless** - all opportunities, accounts, contacts assigned to a shared user become meaningless, because no one knows who is truly working on those records.
- › **You're unable to access any filters** for "My Contacts, My Accounts, My Opportunities, My Activities."

In a nutshell - you're setting yourself up for lots of unnecessary confusion.

How do you solve it?

Simple.

Each person should get their own unique username and password.

Problem #3 – Improper Utilization (or NO Utilization of Roles and Profiles)

- › **Roles:** Who reports to whom. Where they sit on the org chart.
- › **Profiles:** What functionality, features should be available to specific team members.

By properly using both of these critical features, you can easily assign specific users to an appropriate Role and Profile - allowing them to see the records that are relevant to them and access the features and functionality appropriate for them.

WHO SEES WHAT - [Check out this YouTube playlist](#) to better understand:

- › Org wide sharing defaults (are records public read/write, public read only, private?)
- › Role Hierarchy
- › Sharing Rules (Automatically set up sharing based on specific attributes on specific records)
- › Manual Sharing (hand picking which records you want to share with specific individuals)

WHAT TO DO:

Step #1 - Use the Salesforce Optimizer to quickly assess your org's:

- › Sharing Rules
- › Administrator Permissions
- › Profiles
- › Permission Sets
- › Users who haven't logged in recently

How to run Salesforce Optimizer in your org:

- › Setup
- › (In Quickfind Search) "Optimizer"
- › Click "Optimizer"
- › Hit "Run Optimizer"

Resources to learn more about Optimizer:

- › [Improve Your Salesforce Implementation with Optimizer](#)
- › [Analyzing Your Org with Salesforce Optimizer – Webinar Recap](#)

Step #2 - Configure your roles appropriately:

- › Identify or create an org chart for your company showing who reports to who.
- › Create roles in Salesforce to match the roles within your organization
- › Roles should resemble job titles. They should NOT be named as people!
- › Assign people to the appropriate role (matching up people's names to their job title in the Role hierarchy).

Additional Resources to Understand Data Security in Salesforce:

- › [Control What Users Can Access](#)
- › [Control Access to Fields](#)
- › [Overview of Data Security](#)
- › [Control Access to Records](#)
- › [Control Access to the Org](#)
- › [Create a Role Hierarchy](#)
- › [Control Access to Objects](#)
- › [Define Sharing Rules](#)



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