Adding Your Staff as Users to Salesforce

Each member of your internal staff needs a SalesForce license to access and use the system.

Most people in your organization should be set-up in the staff role. Depending on your organization, you may choose to have additional administrative users. The System Administration role is necessary to:

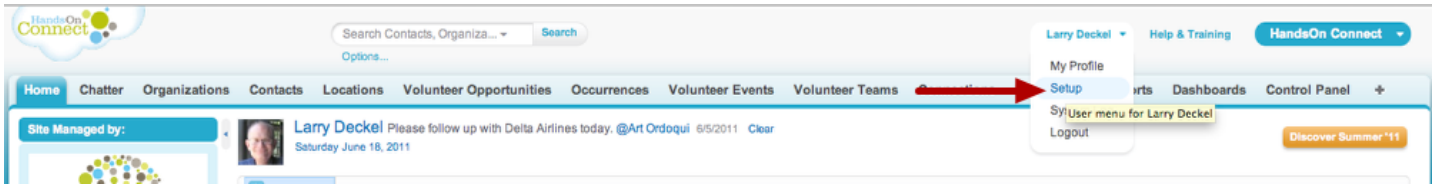
- Add additional users
- Customize functionality and workflows of HandsOn Connect and Salesforce
- Add custom objects, custom fields, and change page layouts.

***Note**: We recommend limiting System Administrator access to people who absolutely must have direct access to this functionality. System admins should be fully trained in Salesforce and HandsOn Connect administration to avoid accidentally harming your system. Give "staff" access to all others. When staff needs something changed that is outside their 'role' access -- they should see their system administrator to request those changes.*

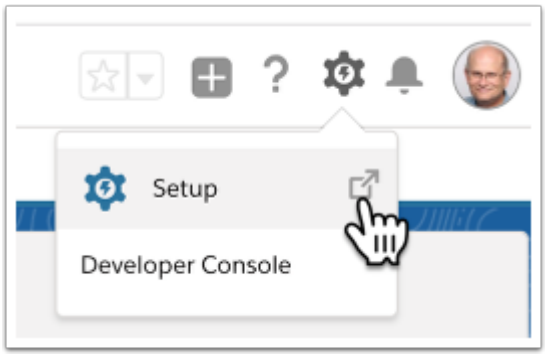
Note: By default - only System Administrators have access to the CMS and the ability to customize and modify the public site. However, Staff users CAN be granted special access to the CMS. If you have a staff user who needs access to the CMS, open a support ticket and we can grant CMS access to staff users.

***Note:** Are you adding a new user because you are deactivating an existing user and turning over their responsibilities to the new user? If so - consult the advanced system administrator guide for the appropriate posts on* How to Update or Change internal and Partner Staff.

How to add licensed salesforce users:

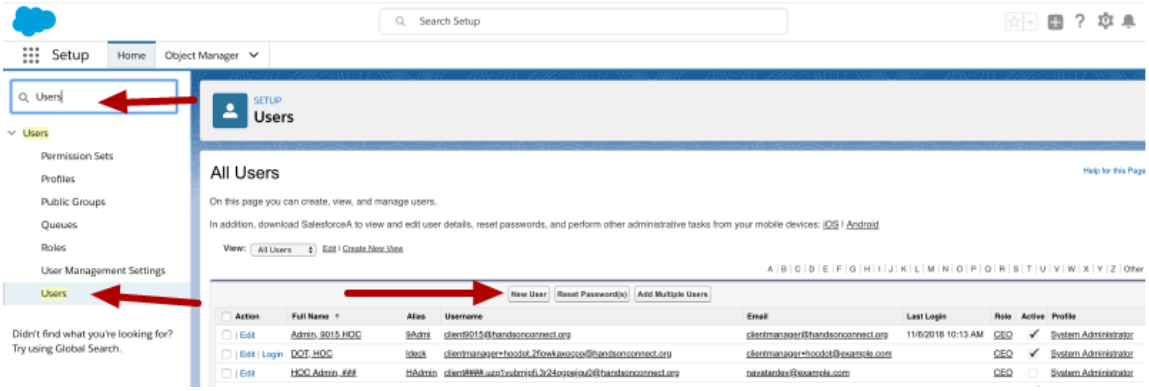


In Salesforce lightning the setup menu is found here:



Use the Quick Find box to search for "Users"

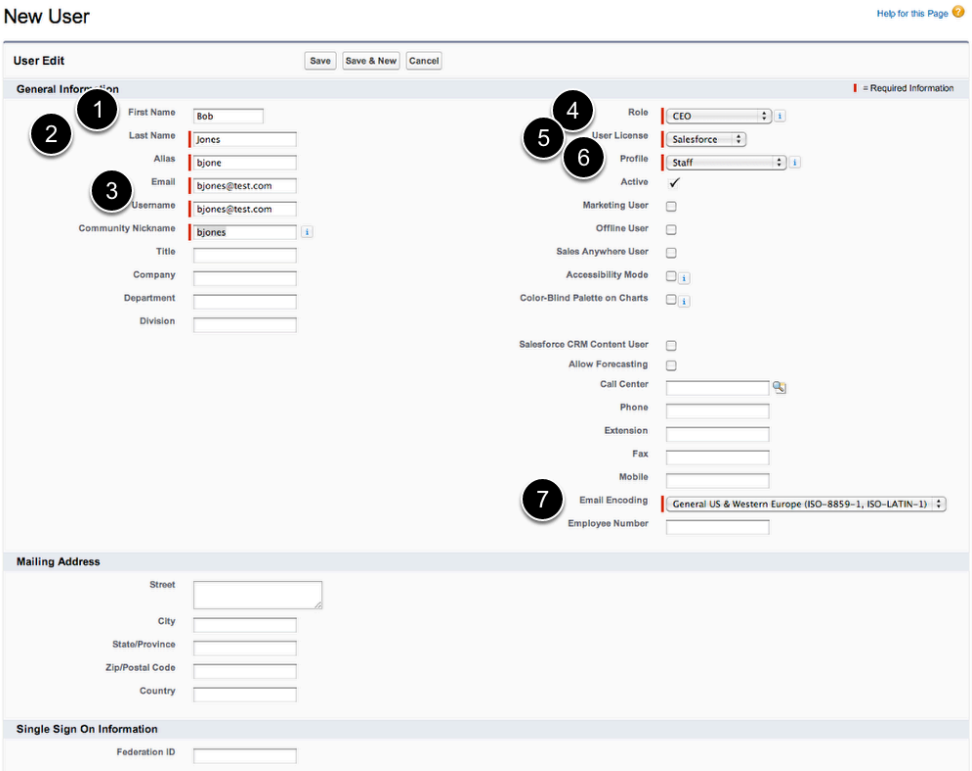
Then Select "Users", and click on New User.



Clicking on users will show a view of some of the users in your system. (You can [create new views](#) if you want to see certain groups of users).

In this case, we want to add a New User so click on the **New User** button.

Complete the following fields in the new user record and save.



The following fields must be filled in:

1. First Name:

2. Last Name:

(Alias, Username, and Community Nickname will automatically be filled in for you).

3. Email and Username: These should be the same and must be in the form of a valid email address.

4. Role: select CEO (roles are not part of HandsOn Connect, and so they do not matter, just select the top of this hierarchy)

(note: you will not be able to select this picklist until AFTER you set the User License type)

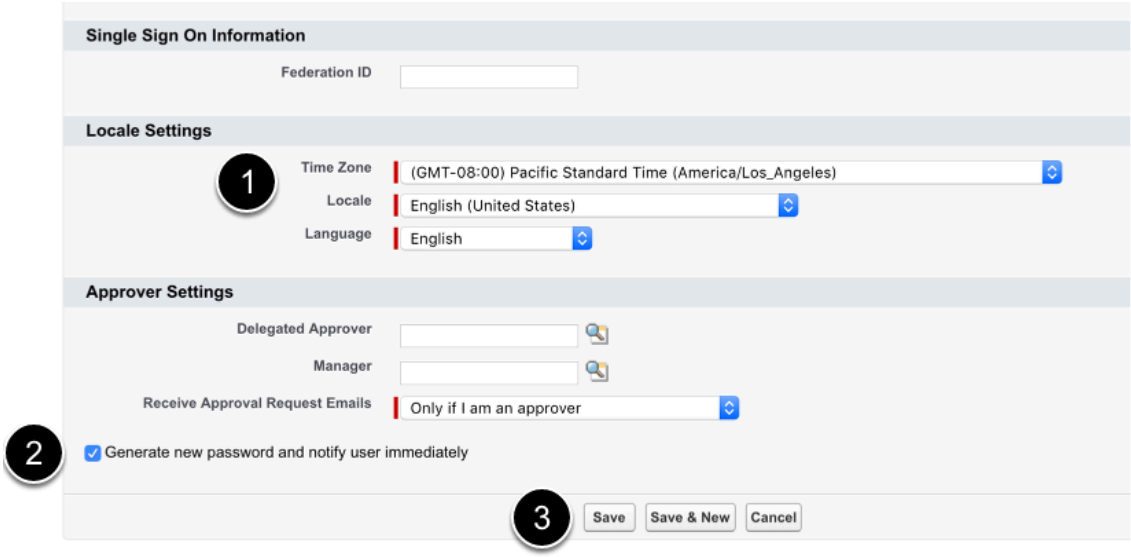
5. User License = Salesforce

6. Profile = (either System Administrator or Staff)

7. Leave the Email encoding to its default setting "General US & Western Europe)

You can optionally fill in the phone and mailing info if desired. It is not required here and you'll usually use this persons contact record in the system for keeping track of that information as its easier to access.

If you are using Salesforce Platform licenses instead of full Salesforce Licenses, you'll be given the name of the additional profile that's been set up for your platform license users.



1. Check to make sure the correct time zone is selected for the user. All of your users should be set to use the same time zone (the time zone you'll use for all your volunteer opportunities)

2. Check the "Generate new Password and notify user immediately button.

3. Click the Save button

An email will be sent to the email address you specified, letting them know an account has been created, and giving them a temporary log-in password which they will update when they activate their account.

Repeat this for up to nine people on your staff who will be using the administrative end of Salesforce for training and beyond.

Note: This is for your staff only. NOT for your partner organizations or volunteer leaders. Access for them will be discussed in a later training.