

Last Updated: 10/02/2020

Help Desk Guide

L1 GUIDE



Missouri's Advanced Contact Tracing System

Important Support Links and Trailheads

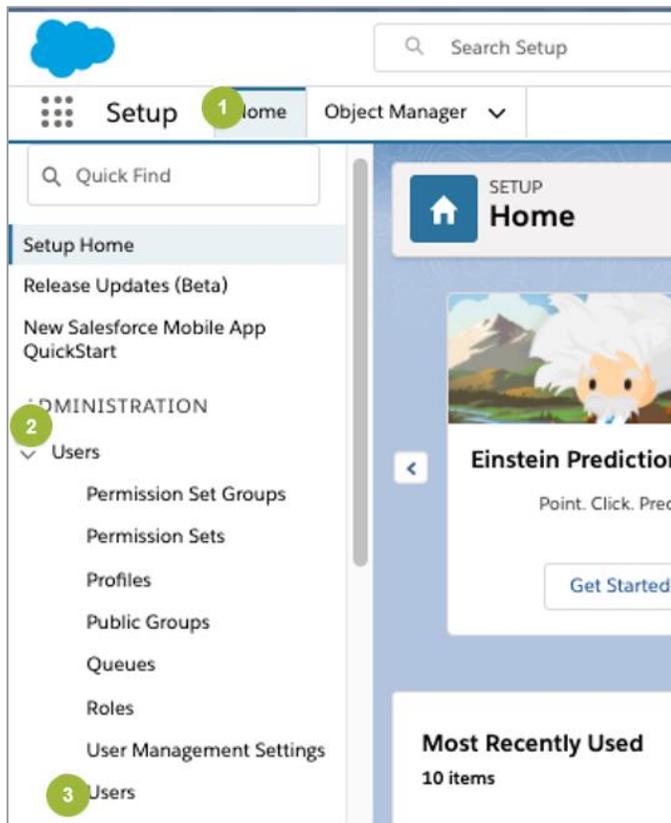


- https://trailhead.salesforce.com/en/content/learn/modules/lex_implementation_on_user_setup_mgmt
- https://trailhead.salesforce.com/en/content/learn/trails/force_com_admin_beginner
- <https://help.salesforce.com/support>

Navigating Salesforce

Navigate to User Administration

1. Click on 'Home'
2. Open the 'Users' menu
3. Click on 'Users'



Navigate to a User Record

1. After navigating to User Administration, Select the first letter of the user's last name to find their record.

All Users [Help for this Page](#)

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: **All Users** | [Edit](#) | [Create New View](#) <Previous Page | Next Page>

1 A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

<input type="checkbox"/> Action	Full Name ↑	Alias	Username	Last Login	Role	Active
<input type="checkbox"/> Edit	Alam, Sarah	salam	sarah.t.alam@moctqa.moct.com	7/27/2020, 8:08 AM		<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit	Alexander, Abraham	aalex	abraham.alexander@moct.prod.moctqa	8/3/2020, 2:56 AM		<input checked="" type="checkbox"/>

User Administration

Reset Password

1. Navigate to the User Record
2. At the top of the User Record click the 'Reset Password' button

[Permission Set Assignments \(1\)](#) | [Permission Set Assignments: Activation Required \(0\)](#) | [Permission Set Group Assignments \(0\)](#) | [Purchase Assignments \(0\)](#) | [Personal Groups \(0\)](#) | [Public Group Membership \(0\)](#) | [Queue Membership \(0\)](#) | [User Skills \(0\)](#) | [Installed Apps \(0\)](#) | [Third-Party Account Links \(0\)](#) | [Installed Mobile Apps \(0\)](#) | [Authentication Settings for External Systems \(0\)](#)

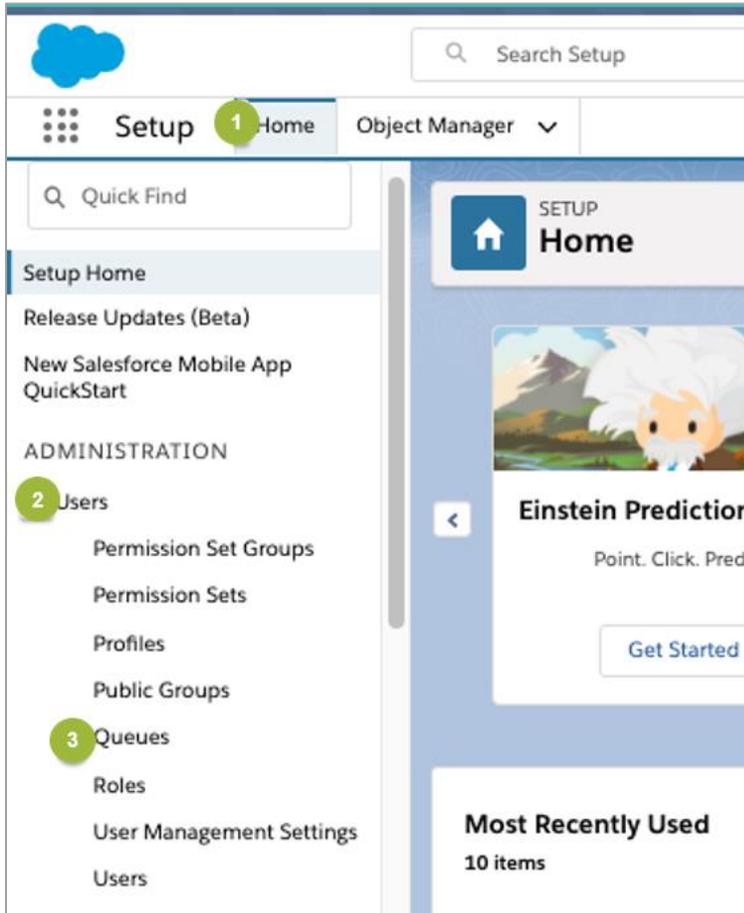
[Edit](#) [Share](#) **2** [Reset Password](#) [Freeze](#)

Name	John Smith	Role	
Alias	jsmit	User License	Sales
Email	jsmith@test.com	Profile	Conta
Username	jsmith11@test.com	Active	<input checked="" type="checkbox"/>
Nickname	User15964759985579427898 i	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Sales Anywhere User	<input type="checkbox"/>
Department		Knowledge User	<input type="checkbox"/>
Division		Flow User	<input type="checkbox"/>
Address		Service Cloud User	<input type="checkbox"/>
Time Zone	(GMT-04:00) Eastern Daylight Time (America/Indiana/Indianapolis)	Chat User	<input type="checkbox"/>
Locale	English (United States)	Mobile Push Registrations	View
Language	English	Accessibility Mode (Classic Only)	<input type="checkbox"/>
Integrated Approver		Debug Mode	<input type="checkbox"/>



Add User to a Queue

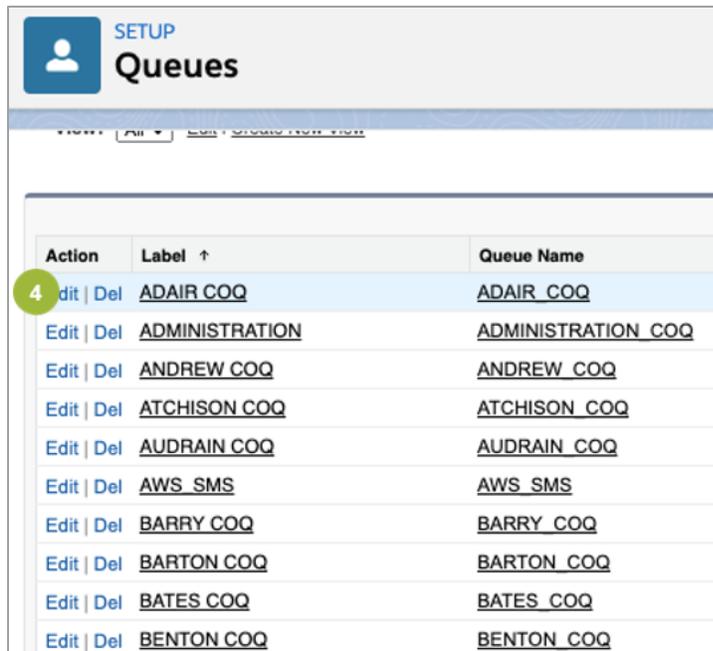
1. Navigate to the User Administration Menu
2. Open the Users Menu
3. Select Queues



Note: The Queues align to the jurisdictions.

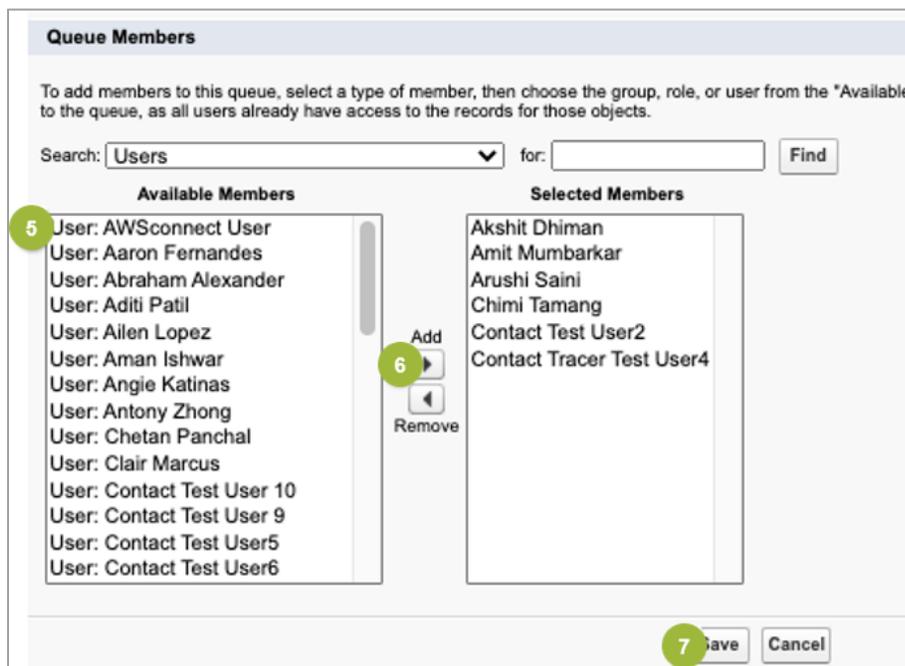


- Click 'Edit' on the Queue



Action	Label ↑	Queue Name
4 Edit Del	<u>ADAIR COQ</u>	<u>ADAIR_COQ</u>
Edit Del	<u>ADMINISTRATION</u>	<u>ADMINISTRATION_COQ</u>
Edit Del	<u>ANDREW COQ</u>	<u>ANDREW_COQ</u>
Edit Del	<u>ATCHISON COQ</u>	<u>ATCHISON_COQ</u>
Edit Del	<u>AUDRAIN COQ</u>	<u>AUDRAIN_COQ</u>
Edit Del	<u>AWS_SMS</u>	<u>AWS_SMS</u>
Edit Del	<u>BARRY COQ</u>	<u>BARRY_COQ</u>
Edit Del	<u>BARTON COQ</u>	<u>BARTON_COQ</u>
Edit Del	<u>BATES COQ</u>	<u>BATES_COQ</u>
Edit Del	<u>BENTON COQ</u>	<u>BENTON_COQ</u>

- Select the User to be added to the queue
- Click the add arrow, verify the name is in the 'Selected Members' list
- Click Save



Queue Members

To add members to this queue, select a type of member, then choose the group, role, or user from the *Available to the queue, as all users already have access to the records for those objects.

Search: for:

Available Members

- 5 User: AWSconnect User
- User: Aaron Fernandes
- User: Abraham Alexander
- User: Aditi Patil
- User: Ailen Lopez
- User: Aman Ishwar
- User: Angie Katinas
- User: Antony Zhong
- User: Chetan Panchal
- User: Clair Marcus
- User: Contact Test User 10
- User: Contact Test User 9
- User: Contact Test User5
- User: Contact Test User6

Selected Members

- Akshit Dhiman
- Amit Mumbarkar
- Arushi Saini
- Chimi Tamang
- Contact Test User2
- Contact Tracer Test User4



Create New User

1. Click on 'New User'

A screenshot of a user management interface. At the top, there is a navigation bar with letters A through N. Below it, there are three buttons: 'New User' (highlighted with a green circle and the number 1), 'Reset Password(s)', and 'Add Multiple Users'. Below the buttons is a table with the heading 'Username'. The table contains several rows of email addresses, including 'braham.alexander@moct_prod.moctdevu1', 'ana.a.chamblee@accenture.com.moctdevu1', '.chandraprakash@moct_prod.moctdevu1', 'hatty.00dr00000002js0eam.rbh4r2ursdfv@chatter.salesforce.com', 'ayant.k.das@accenture.com.moct.moctdevu1', 'kshit.dhiman@moct_prod.moctdevu1', 'hakti.gopal@moct_prod.moctdevu1', and 'ajaguru.gurunathan@moct_prod.moctdevu1'.

2. Enter a First Name
3. Enter a Last Name
4. Enter an Email address and username (**add a suffix “.moct” to the end of the username**)
5. Select the role LPHA or Administration depending on if they are at the state or LPHA level
6. Select 'Salesforce' for license
7. Select the 'Contact Tracer' profile
 - 7.1 Populate the primary jurisdiction

A screenshot of the 'User Edit' form. At the top, there are three buttons: 'Save', 'Save & New', and 'Cancel'. Below the buttons is a section titled 'General Information'. The form contains several fields and options, each with a green circle and a number indicating a step in the process:

- 2. First Name: John
- 3. Last Name: Smith
- 4. Email: jsmith@test.com
- 5. Role: ANDREW
- 6. User License: Salesforce
- 7. Profile: Contact Tracer

Other fields include Middle Name, Suffix, Alias (jsmit), Username (jsmith@test.com), Nickname (User159648076706472), Active (checked), Marketing User, Offline User, Sales Anywhere User, and Knowledge User (all unchecked).



Additional Information

Primary Jurisdiction 7.1

Unit

Locale Settings

8. Enter local time zone information
9. Uncheck the 'Generate new password and notify user immediately' box
10. Click Save

 **Important:** Do not forget to uncheck this box!

Locale Settings

8 Time Zone

Locale

Language

Approver Settings

Delegated Approver

Manager

9 Receive Approval Request Emails

Generate new password and notify user immediately

10

11. Scroll down on the newly created user record and click 'Edit Assignments' on the Permission Set Assignments section

Permission Set Assignments 11 Edit Assignments

No records to display

Permission Set Assignments: Activation Required Edit Assignments

No records to display

Permission Set Group Assignments Edit Assignments

No records to display

Permission Set License Assignments Edit Assignments

No records to display



12. Select AC_Agent' from the list of Available Permission Sets and add it to Enabled Permission Sets
13. Click Save
14. Add the user to the proper queues
15. After creating the user and adding them to permission sets, scroll to the top of the user record and reset the user password

Permission Set Assignments
Joe Pieczynski

Save Cancel

Available Permission Sets

- 2FA Enabled
- AC Administrator
- AC_Manager
- ActionPlans
- CRM User
- Data Steward
- Einstein Analytics for Health Cloud Admin
- Einstein Analytics for Health Cloud Integration
- Einstein Case Classification User
- Enhanced Report Permissions

Add
Remove

Enabled Permission Sets

- AC_Agent

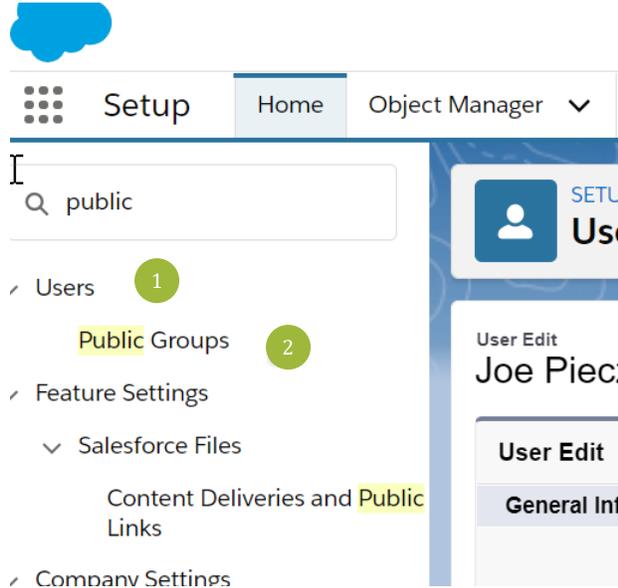
Save Cancel



Add User to a Public Group

Public groups allow users to access multiple jurisdictions

1. Go to setup and select users
2. Select public groups



3. Select the public group

Public Groups

A public group is a set of users. It can contain indi

View: [Edit](#) | [Create New View](#)

Action	Label ↑
Edit Del	ADAIR
Edit Del	ADMINISTRATION
Edit Del	ANDREW
Edit Del	ATCHISON
Edit Del	AUDRAIN
Edit Del	BARRY

4. Press Edit

Group
ADAIR

4

Label	ADAIR	Edit	Delete
Group Name	ADAIR		
Grant Access Using Hierarchies	<input checked="" type="checkbox"/>		
Created By	Copado Integration 9/22/2020, 12:23 AM		

[View All Users](#)

No members.

5. Select users, search for your name
6. Select the user and move over to selected members, press save

SETUP
Public Groups

Group Membership
Group: ADAIR

Group Information

Edit Public Group

Label: ADAIR

Group Name: ADAIR

Grant Access Using Hierarchies:

Search: Users for: Joe Find

Available Members	Selected Members
User: joe test User: joe test2	User: Joe Pieczynski

Add

User Login Troubleshooting

1. View the user in setup
2. Scroll down the Login History related list:
 - a. **Invalid Password:** Incorrect Password, click the reset password button at the top to prompt them for a new password
 - b. **Password Lockout:** They tried the password too many times. Either reset their password or click the unlock button at the top
 - c. **Failed:** Computer activation required: they need to find the validation email and enter the code
 - d. **Success:** They successfully logged in

Login History [Login History Help](#)

Login Time	Source IP	Login Type	Status	Application	Login URL	Community	Location
8/5/2020, 10:15:28 AM PDT	108.62.240.87	Application	Invalid Password	Browser	mact--mactrmg.my.salesforce.com		United States
8/5/2020, 10:00:01 AM PDT	54.235.106.60	Application	Password Lockout	Browser	mact--mactrmg.my.salesforce.com		United States
8/5/2020, 9:59:33 AM PDT	168.166.80.237	Application	Invalid Password	Browser	mact--mactrmg.my.salesforce.com		United States
8/5/2020, 9:16:39 AM PDT	38.132.110.6	Application	Invalid Password	Browser	mact--mactrmg.my.salesforce.com		United States
8/5/2020, 9:15:03 AM PDT	54.158.231.36	Application	Failed: Computer activation required	Browser	mact--mactrmg.my.salesforce.com		United States
8/5/2020, 9:15:00 AM PDT	168.166.80.237	Application	Success	Browser	mact--mactrmg.my.salesforce.com		United States

[Download login history for last six months, including logins from outside the website, such as API logins. \(Excel csv file\)](#)



Deactivate User

1. Open up the user record
2. Unselect the active checkbox
3. Save Record
4. Remove them from any queues

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'users' entered. Below the search bar, the 'Users' menu item is highlighted with a green circle and the number '1'. The main content area shows the 'User Edit' page for 'Angie Katinas'. The 'Active' checkbox is unselected, and a green circle with the number '2' highlights it. The 'Role' is set to 'Administration', 'User License' is 'Salesforce', and 'Profile' is 'System Administrator'. The 'Email' field contains 'angela.katinas@accenture.'

Record Visibility Troubleshooting and Considerations

1. Salesforce is built on a private sharing model. This means that users will not be able to see a record unless
 - a. they are the owner
 - b. a member of the queue assigned to the case owner
 - c. same role as the owner
 - d. above the owner in the role hierarchy
2. When you change the case owner to a queue outside of that user's jurisdiction, the original owner will lose read access.
3. When a user takes ownership of a case, the related account ownership is updated to that user
4. When a jurisdictional queue is assigned to a case, a member of that queue is assigned to the related account owner
 - a. If the jurisdictional queue does not have a member, the owner of the related account will stay the same until a user takes ownership
5. A top-level administration role sits above the jurisdictional roles in the hierarchy
 - a. Any users in this role will have access to all cases



- b. If a case comes in without a valid jurisdiction, it will be assigned to the administration queue and role

Reporting

https://trailhead.salesforce.com/en/content/learn/modules/lex_implementation_reports_dashboards?trail_id=force_com_admin_beginner

