

Clone This User - Installation Guide for Lightning

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Overview

The general idea for this product comes from the instant need that many admins have from time to time for a new user. Creating the new user often comes in as an ad hoc request to duplicate one user for this new one. We imagined the scenario that an urgent email comes in to the Salesforce Administrator from the hiring manager while the administrator is out at lunch; how could the admin quickly and easily create the user record with all the related permission sets, public group access, and user features selected?

With Clone This User, the administrator can look up the existing user that serves as the basis for the new one, enter name and email, and generate the username and password immediately. They can do this from a mobile device or a browser with very few clicks and only one screen, vastly improving the experience of generating that nearly identical user record. The purpose of this release is to provide even more flexibility in how to clone Users while in Lightning.

Note that there are two ways you can access Clone This User (in both Classic and Lightning). Those are: through Setup and on the User record (custom links), or through the AppLauncher by clicking the "Clone This User" object.

New advancements for our Lightning roll out include adding Clone This User as a Lightning Component to any page as well as adding Clone This User as a utility item. The CTU utility item is great for the pop out function (i.e. put Clone This User directly next to that spreadsheet you are referencing).



Technical Requirements

<u>Salesforce.com Supported Versions:</u> Professional Edition, Enterprise Edition, Performance / Unlimited Edition, Developer Edition

Support

For support related to Clone This User, you can email <u>support@arkusinc.com</u> or call (888) 271-1963 and leave a message.

Installation Steps

Before beginning the installation process, verify that your organization has a supported version of Salesforce. To install Clone This User, follow the instructions below.

- Navigate to this link: <u>https://appexchange.salesforce.com/listingDetail?listingId=a0N300000B5jTkEAJ</u>
- 2. Click "Get It Now"



3. Click "Log In"

	riee
	Log In to AppExchange
	To continue, log in with your Salesforce credentials.
	Log In
	and the provider of this listing, Arkus, Inc
	Don't have a Salesforce account?
	continue as ouest
	Cancel
_	



4. Select if you would like to install in Production or Sandbox

Where do you want to install this package?
Before you install in a production org, we suggest testing in a sandbox.
Install in a Production Environment Install where you or your users work, including developer orgs. Install in Production
Install in a Sandbox Test in a copy of a production org. Install in Sandbox
Cancel

- 5. Confirm your details
 - You may have to edit/update your Title and other credentials
 - Click "Save" when you have finished those steps
- 6. Click "Confirm and Install"
 - Salesforce will have you log into your environment again to confirm your identity
- 7. Select your security level
 - We recommend that you "**Install for Admins Only**", as Clone This User will likely be used by system administrators.
 - In the event that your org has different policies, you can "Install for All Users" or "Install for Specific Profiles" which will allow you to provide access for your specific needs.



- 8. Click "Install" to start installing the package into your Salesforce environment.
 - **NOTE:** Professional Edition users will not have this step.



9. After the installation occurs, you will see the Installation Complete page notifying you that the package installed has been successful.

By Arkus, Inc.	
Installation Complete!	
	Done

Lightning Component

With our Lightning release, you can now add Clone This User to any Lightning page. We recommend the Home page for those Users that are cloning frequently.

Note: You will need to enable My Domain to utilize any Custom Lightning Component. For the complete steps, please go to <u>help.salesforce.com</u> and search for "My Domain" or click <u>HERE</u>.

1. In Setup \rightarrow Lightning App Builder





- 2. Select the Lightning page you would like to add the component to
- 3. Click "Edit"

Lightning Page Home_Page_Default Lightning Page Detail		Edit	Clone	Delete
▼ Information				
Name H	lome_Page_Default			
Description				
		Edit	Clone	Delete

- 4. Under "Custom", locate "lwcCloneThisUser"
 - Note: There are 2 components for Clone This User
 - "CloneThisUser" is the original component that does not contain our upgrades/changes
 - Please use "lwcCloneThisUser" instead
 - The acronym "lwc" stands for Lightning Web Component

Lightning Components
Q Search components
Performance
自 Quip
😑 Quip Document (Beta)
Quip Notifications
Recent Items
Secent Records
Recommendations
🔁 Report Chart
🗉 Rich Text
🗰 Today's Events
📁 Today's Tasks
😑 Trending Topits
<₽ Visualforce
✓ Custom (2)
f CloneThisUser
IwcCloneThisUser



5. Drag the "lwcCloneThisUser" component to the page and click save.

Home Page De	fault		← Back	? Help
Refresh		Sav	/e Acti	vation
As of Today 12:22:50 PM	Assistant	Page		
		*Label		
	Nothing needs your attention right now. Check back later.	Home Page Default		
	CTU	*Developer Name		
		Home_Page_Default		
Sep	CLONE THIS USER	Page Type		

Lightning Utility Bar

Another addition to our Lightning rollout includes the use of the Lightning utility bar. The pop-out function is a great tool if you are referencing a document/spreadsheet for your new User's details. To enable the utility bar pop-out function, be sure to complete the Critical Update associated (click <u>HERE</u> for details).

1. In Setup \rightarrow "App Manager"

Setup	Home	Object
Q app man		
√ Apps	-	
App Manager		
Didn't find what you Try using Global Sea	're looking rch.	for?

2. Locate the App where you would like to add the Utility Bar



3. Select the drop down arrow \rightarrow Click "Edit"



4. Locate "Utility Items"

🖬 Lightning App Builder	🏚 App Settings	🕒 Pages 🗸			Sales
APP SETTINGS	٨٥	n Dotails & B	randing		
App Details & Branding	Ap	p Details & D	ranung		
App Options Utility Items	Give	your Lightning app Details	a name and description. Uplo	ad an image and choos App Branding	se the highlight color for its navigation bar.
Navigation Items User Profiles	* App Sal	Name 0		Image 🚺	Primary Color Hex Value #0070D2
App Performance (Beta)	* Dev Lig	eloper Name ()		t Upload	
	Desci	ription			
	Ma lea	nage your sales pro ds, opportunities, a	ocess with accounts, and more	Org Theme Option Use the app's i	ns image and color instead of the org's custom theme
				App Launcher I	Preview
				Ø	Sales Manage your sales process with accounts, leads, opport

5. Click "Add Utility Item"

Add Utility Item	
Q Search	ility bar
✓ Standard (14)	
Chatter Feed	_
f Chatter Publisher	
😴 Flow	_
Ilistory	
🔲 List View	_
>>> Macros	_
😰 Notes	
Copen CTI Softphone	
😑 Quip	To er
Quip Notifications	



- 6. Type "Clone This User"
- 7. Under "Custom" select "lwcCloneThisUser"
 - Note: There are 2 components for Clone This User
 - "CloneThisUser" is the original component that does not contain our upgrades/changes
 - Please use "lwcCloneThisUser" instead
 - The acronym "lwc" = Lightning Web Component
- 8. Leave the default Properties as they are
 - Note: It is safe to change the "Label" and "Icon," but for best use leave the width and height as is. You do not need to check the "Start automatically" checkbox.
 - For the Label, we recommend changing it to "Clone This User"
 - For the icon, we recommend "adduser"
- 9. Click "Save"

Add Utility Item	
✓ Standard (€)	
✓ Custom (2)	
f CloneThisUser	
IwcCloneThisUser	
No Custom Managed (0)	



Mobile Setup in Lightning

Now that you've completed the install of the package, if you would like CTU to be available on mobile devices, you'll need to follow these steps:

- 1. In the Setup \rightarrow Apps \rightarrow Mobile App \rightarrow Salesforce \rightarrow Salesforce Navigation
 - Or search for "Salesforce Navigation"



- 2. Under Salesforce Navigation, you will see Navigation Menu Items → Select "Clone This User" and click the "Add" arrow move it to "Selected".
- 3. Click "Save"

Available		Selected	
Einstein Assistant Einstein Insights Reports Approvals Paused Flow Interviews Lightning Usage App	Add Remove	Chatter People Groups Today Smart Search Items Tasks Dashboards Events Test Inout Clone This User	Up Dow
Use SHIFT + click or click and drag to select a range of a	adjacent items.	Use CTRL + click to select multiple items	that are not adjacent.



Custom Link on User Page Layout

You can also add a custom link on all User records to easily clone a user from their user record. In order to add the custom link to the User Page Layout, follow these steps.

- 1. In Setup, click "Object Manager"
- 2. Locate "User"



- 3. Click on "User"
- 4. Click on "User Page Layout"



- 5. Click on the User Page Layout where you would like to add the Custom Link
- 6. Click "Custom Links"



	Q Quick Find Custom Link Name	
Custom Links Quick Actions Mobile & Lightning Actions Expanded Lookups Report Charts	★■ Blank Space Clone This User Clone This User f	
ומיסטו. וו יסט כטסוטוווצט וווט	actions in the Quick Actions in the Datestorce Diassic Fublishe	ו של איני איני איני איני איני איני איני אינ

7. Drag and drop "Clone This User"

Save Quick Save Preview	w As 🔻 Cancel 🔷 Undo 🐟 Redo 🖪 Layout Properties
Fields Custom Links Quick Actions Mobile & Lightning Actions Expanded Lookups Report Charts	Clone This User
in the Quick Actions in the Sa User Detail Standard Fields (Cannot t	alesforce Classic Publis er section, and have saved the layout, then this sect
Additional Information (Ha Sales Team Favorite Color Favorite Band	eader visible on edit onty Sample Text Sample Text Sample Text
Custom Links (Header visi Clone This User - Classic Clone This User	ble on detail only)

Note: There are 2 custom link for Clone This User.

- Clone This User Classic: This is the custom link that should be used in Classic.
- Clone This User: This is the custom link that should be used in Lightning.
- 8. Click "Save"
- 9. You are now ready to use Clone This User!



Non-Admin Users: Visualforce Permission Sets

Do you have a non-System Administrator User that can clone Users? They must be assigned a permission set to gain access to the necessary Visualforce pages. You also need to follow this step for any other delegated admins.

- 1. Setup \rightarrow "Users" \rightarrow "Permission Sets"
 - Or search "Permission Sets"
- 2. Click "New"
- 3. Enter this info:
 - Label: "Clone This User"
 - APU Name: Auto-populates
 - Description: Enables users that are not System Administrators to use Clone This User app.
- 4. Click "Save"

	Save	
inter permission set information		
Label	Clone This User	
API Name	Clone_This_User	i
Description	Enables users that are not System Administrators to use Clone This User App.	1
elect the type of users who will use t	nis permission set	
Who will use this permission set? If you plai User License	to assign this permission set to multiple users with different licenses, choose 'None'. None i	If only users v
	Save Cancel	



5. Under "Apps" select "Visualforce Page Access"

0				(
G Find Settings	8	Clone	Delete	Edit Properties	Manage Assignments
Permission Set Over	view				
		De	escription	Enables use	rs that are not System Administrators to use Clone This User App.
		Use	r License	1	
		C	reated By	Bob Bobber	son, 8/5/2015 9:05 AM
Apps					
Settings that apply to Sal and custom apps built on	esforce app Force.com	os, such a	is Sales,	Assigned Settings th	Apps at specify which apps are visible in the app menu
Learn more				Assigned Settings th	Connected Apps at specify which connected apps are visible in the app menu
				Object Se Permission	ttings is to access objects and fields, and settings such as tab availability
				App Perm Permission	issions is to perform app-specific actions, such as "Manage Call Centers"
				Apex Clas Permission	es Access Is to execute Apex classes
				Visualford Permission	te Page Access Ins to execute Visualforce pages
				External I Permission	Data Source Access Is to authenticate against external data sources
				Named Cr Permission	edential Access rs to authenticate against named credentials
				Custom P	ermissions

- 6. Click "Edit"
- 7. Under "Available Visualforce Pages" \rightarrow Select all the Clone This User Visualforce pages
- 8. Click "Add" to add them to "Enabled Visualforce Pages"
- 9. Click "Save"

K Find Settings X	e Delete Edit Properties Manage Ass	signments
mission Set Overview > Visualforce P	age Access 💌	
/isualforce Page Access		Save Cancel
Available Visualforce Pages	Enable	ed Visualforce Pages
J.CioneThisUser J.CioneThisUserList J.CioneThisUserSuccess	Add Remove	

10. Add the new Permission Set to your Users:



• Click on "Manage Assignments"

Permission Set Clone This User	
Clone Delete Edit Propertie	s Manage Assignments
Permission Set Overview > Visualforce Page Access	
Visualforce Page Access Edit	
Visualforce Page Name	
ctu.CloneThisUser	

• Click "Add Assignments"

lone This User			
Back to: Permission Set			
		Add Assignmen	ts Remove Assignmen
Full Name 🕇	Alias	Add Assignmen	ts Remove Assignmen
Full Name ↑ No records to display.	Alias	Add Assignmen Username	ts Remove Assignmen

- 11. Check the box next to the User(s) you wish to assign the Permission Set
- 12. Click "Assign"
- 13. Click "Done"

Provide Arkus Feedback

If you would like to provide feedback about Clone This User, please leave a review on the AppExchange product listing or send us an email to support@arkusinc.com. We are continually building upon Clone This User to increase its functionality and usefulness.

If you are interested in learning more about Arkus and additional applications that we have developed, visit us at <u>www.arkusinc.com</u>.