# Clone This User - User Guide for Lightning

August 6, 2019 - Version 1.3

## 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 users with even more flexibility in how to clone Users while in Lightning.

## Accessing Clone This User

There are five ways you can access Clone This User:

1. Desktop – User Record
   - Classic and Lightning
   - Through Setup and on the User record (see "Custom Links")
   - Steps needed for use

2. Desktop – AppLauncher
   - Classic and Lightning
       - Classic – Please use "Clone This User - Classic"
       - Lightning – Please use "Clone This User"
   - Through the AppLauncher by clicking the "Clone This User" object
   - No steps needed for use (unless the User is not a System Administrator - please see the Installation Guide)

3. **NEW!** Desktop – Lightning Component
   - Lightning
   - Use on any page
   - Steps needed before use

4. **NEW!** Desktop – Utility Item
   - Lightning
       - Note: 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).
   - Steps needed before use

5. Mobile device
   - Steps needed before use

Please work with your System Administrator, and the Clone This User Installation Guide, to configure the best placement of CTU for your organization.

## Using Clone This User

Clone This User will clone Active as well as Inactive Users. Once a new User is cloned, it is active and ready for use. Your administrator will be able to install the custom link for the user record, the custom mobile app, Lightning page component, and utility bar item (see the Installation Guide for Lightning for more details). Once the installation and configuration are complete for your organization, these instructions will walk the user through the different ways to clone users using Clone This User.
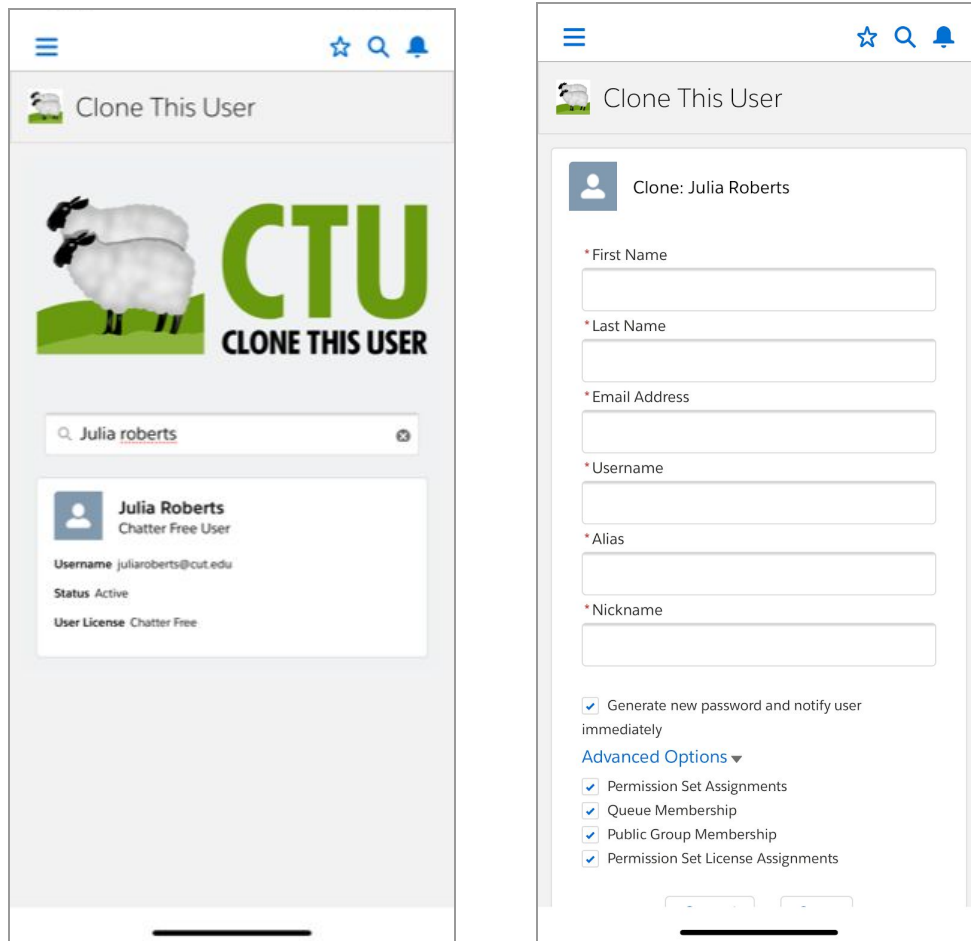
# Creating a User from the Mobile Device

1. Select "Clone This User" from  your mobile device navigation menu

2. Search for the name of the existing User you would like to clone.



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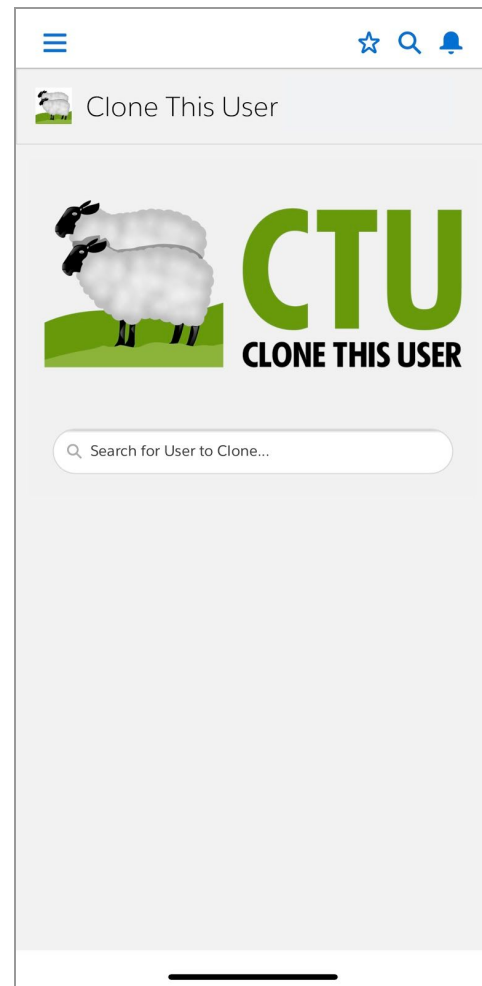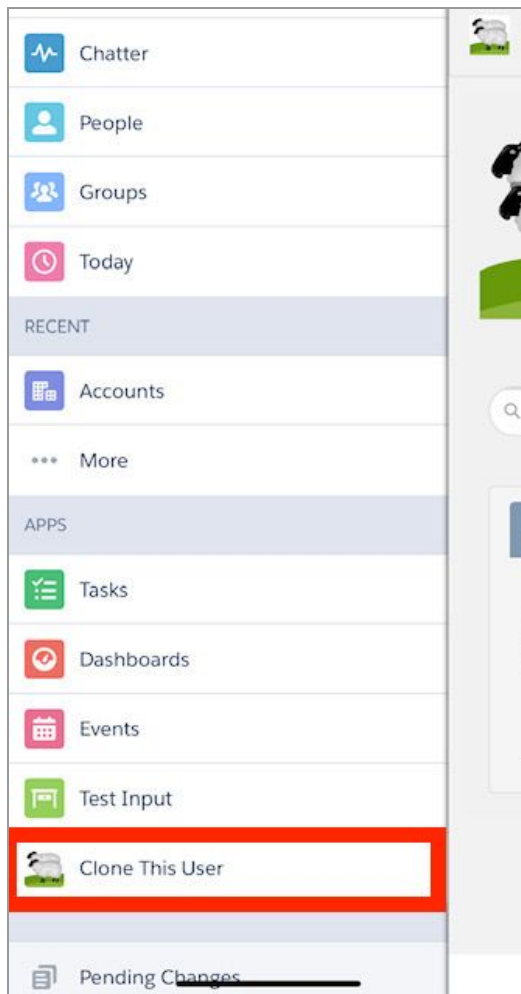
3. Select the User.
   - **NOTE**: You will only be able to clone within the same Salesforce.com license type. See below section for more information on known limitation



4. Input the details of the new User:
   1. Enter First Name, Last Name, and Email
      a. Note: This will auto-fill Username, Alias, and Nickname based on expected Salesforce behavior. If your organization has different policies for these fields, you may edit the default Username, Alias, and Nickname.
   2. Select or deselect  "Generate new password and notify user".
      a. Note: If selected this notifies User immediately and sends password reset link.
   3. Review applicable "Advanced Options" that let you add your new User to the same:
      a. Permission Set Assignments
      b. Queue Membership
      c. Public Group Membership
      d. Permission Set License Assignments

5. Click "Save"
   e. ***NOTE:*** If you do not have enough licenses of the type you are attempting to create, you will receive an error message similar to "You don't have enough Salesforce licenses to clone this user". You need to either deactivate existing users or contact your Salesforce.com Account Executive for more users.

6. Success! When your User has been created, you're taken to a new screen where you can:
   1. Review the following details:
      a. New User - Hyperlink to review
      b. Cloned From - Hyperlink to review
      c. Generated Password? - Yes or No depending on your previous selection
      d. Cloned Fields - Expand to see which fields were cloned to the new User
      e. Advanced Options - Expand to see advanced options selected previously
   2. Click "Clone Another User" button to Clone another User
   3. Click the navigation menu to return to Salesforce
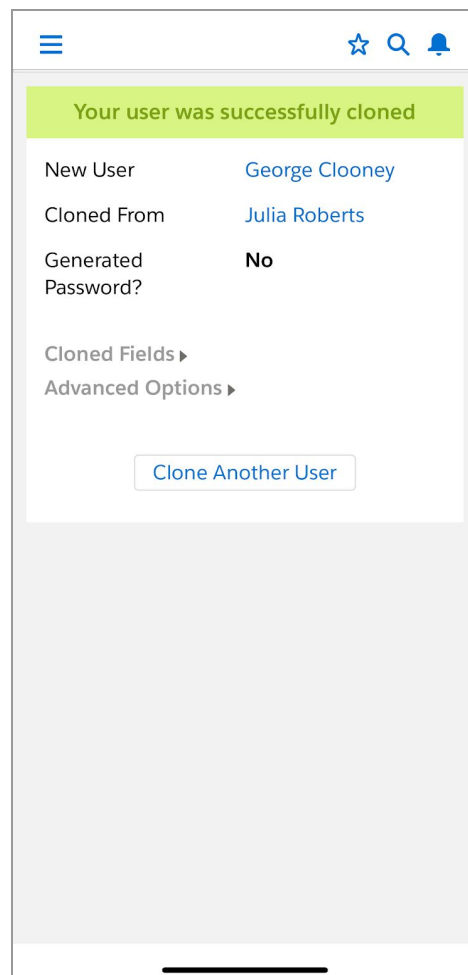
What happens?
1. Clone This User creates the new User with all Permission Sets, Public Groups, features, etc of the original User (unless you have specified otherwise through the Advanced Options feature).
2. Also, unless optionally changed, the new User will receive the new password notification email from Salesforce.com support with new Username and temporary password.
3. You will land on a confirmation page stating "Your user was successfully cloned." This page will have information about the newly created User, the original User that was cloned and a list of all the things that were cloned (such as fields and other assignments).
4. Additionally, there is a link at the bottom of the confirmation page that will direct you to View Manage Packages in case you need to assign the new User to a managed package that requires a license.
5. *NEW!* Click the button at the bottom to create another User.

## Creating a User Browser Options

In Lightning there are 4 options for how to use Clone This User. Clone from these locations:

1. On the User Record (through Setup)
   ○ Automatically added when the package is installed
2. From the Clone This User object/tab
   ○ Automatically added when the package is installed
3. Clone This User Lightning Page Component
   ○ Can be manually added to any Page as a component
4. Clone This User Utility Item
   ○ Can be manually added to the utility bar in an App

See the Installation Guide for more details on how to setup all four options. Below we will share the steps on how to clone users in each location.
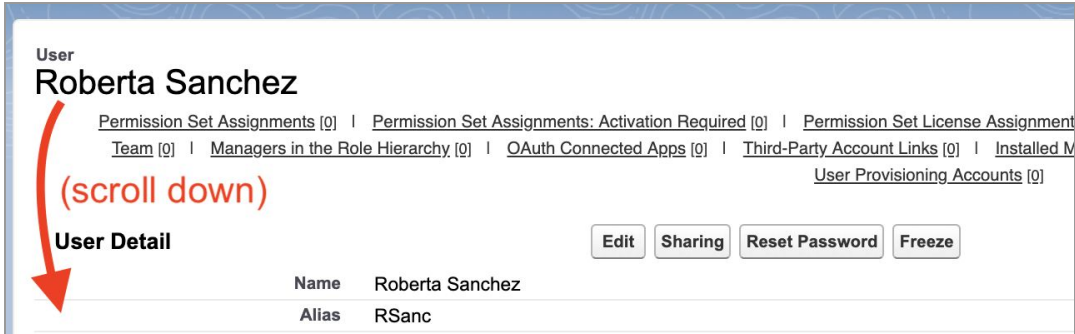
# Creating a User on the User Record

Note: On installation, be sure to add the custom link to the User page layout. For more details about the installation, please see our Installation Guide for Lightning.

1. From the Setup Menu → Administration → Users → Users
   - Or search for Users

2. Click "Users"
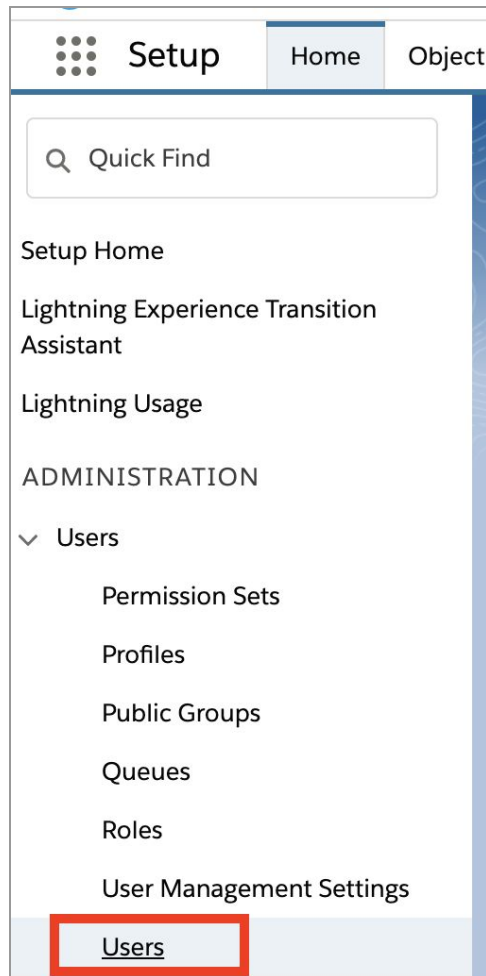


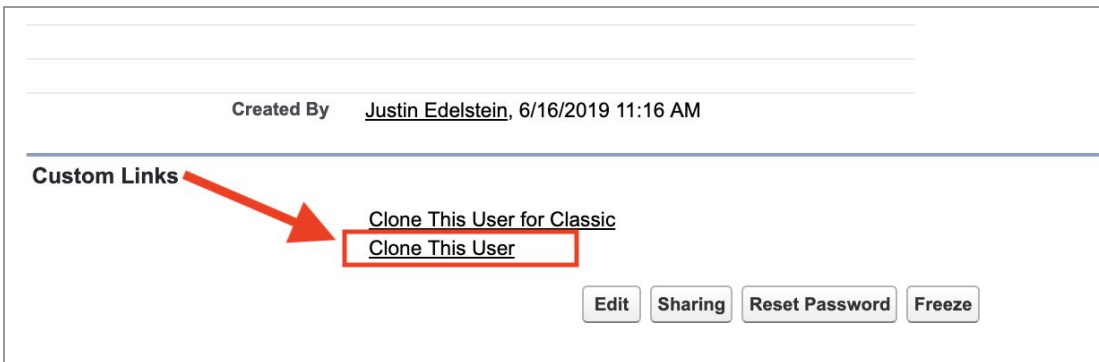3. Select the User you need to clone

4. Scroll down to "Custom Links"
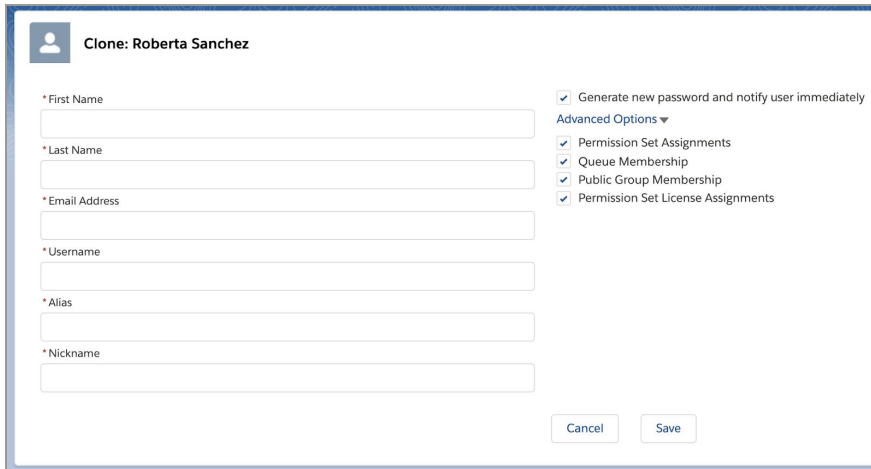
5. Click "Clone This User"
   ○ "Clone This User" is the Lightning version of this app
   ○ "Clone This User for Classic" is for any instance that is still using Classic
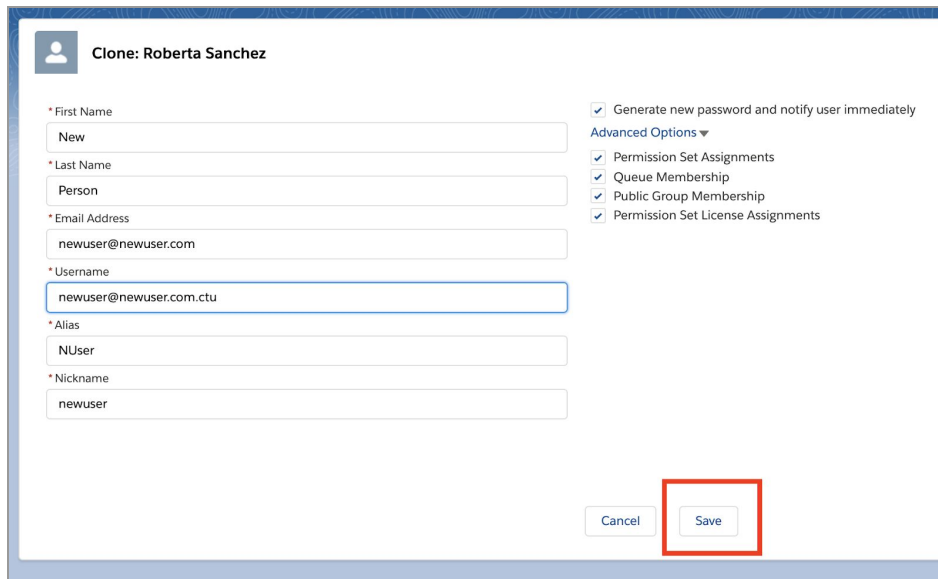     ■ Either will work in Lightning, but we suggest using "Clone This User" when in Lightning for a better user experience.
   ○ **NOTE**: You will only be able to clone within the same Salesforce.com license type. See the next section for more information on known limitations.

6. Enter the new User's unique information:
   ○ First Name, Last Name, Email Address
   ○ **NOTE:** This will auto-fill the Username, Alias, and Nickname based on expected Salesforce.com behavior. If your organization has different policies for these fields, you may edit the default Username, Alias, and Nickname.

7. Options (right-hand side):
   ○ You may deselect option to generate a new password and notify the new User
   ○ You may also review Advanced Options and deselect any values. Please note that unselected values will not be cloned.
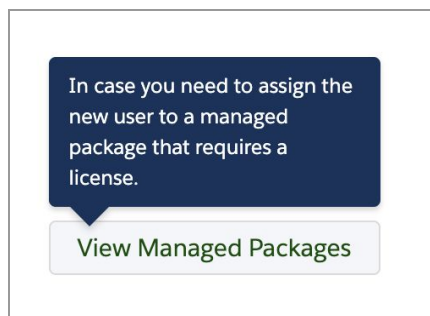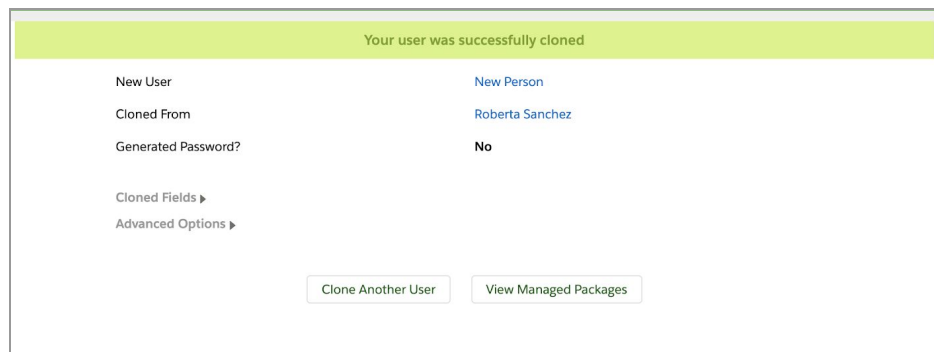


8. Click "Save"
   ○ **_NOTE:_** If you do not have enough licenses of the type you are attempting to create, you will receive an error message similar to "You don't have enough Salesforce licenses to clone this user". You need to either deactivate existing users or contact your Salesforce.com Account Executive for more users.

What happens?
- Clone This User creates a new User with all Permission Sets, Public Groups, features, etc. of the original User (unless you specified otherwise through Advanced Options).
- Unless changed, new User receives new password in an email from Salesforce support.
- Confirmation page states "Your user was successfully cloned" and includes info about the newly created User, original User, and lists things cloned (fields and assignments).
- A link at the bottom of the confirmation page directs you to View Manage Packages in case you need to assign the new User to a managed package that requires a license.
- *NEW!* Click the button at the bottom to create another User.





- You can review:
  - New User - Hyperlink to review
  - Cloned From - Hyperlink to review
  - Generated Password? - Yes or No depending on your previous selection
  - Cloned Fields - Expand to see which fields were cloned to the new User
  - Advanced Options - Expand to see advanced options you selected previously
- "Clone Another User"
  - Click this button to Clone another User
  - Or click the navigation menu to return to Salesforce
  - "View Managed Packages"
    - In case you need to assign the new user to a managed package that requires a license

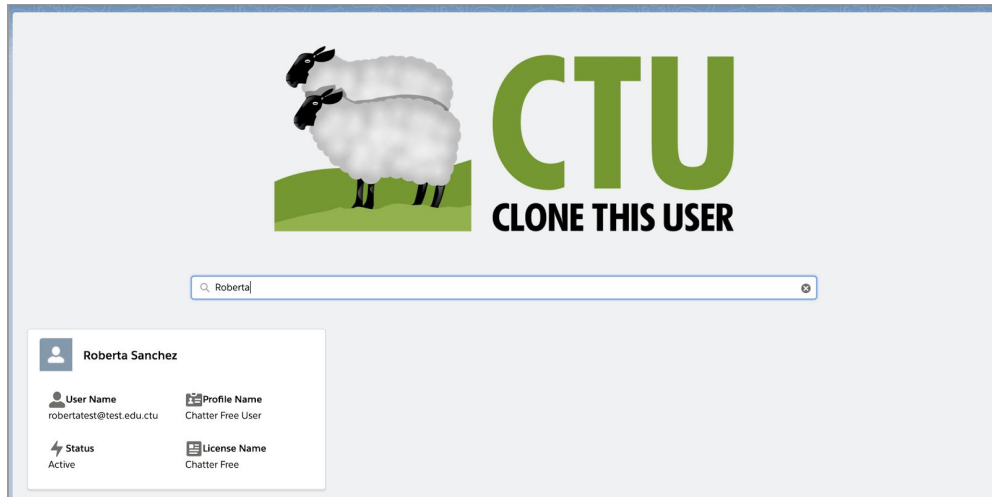# Creating a User from the Lightning Object or Tab

When Clone This User is installed, an object and a tab are automatically created. To locate the object/tab and create a new User follow these steps.

1. Click the "App Launcher"
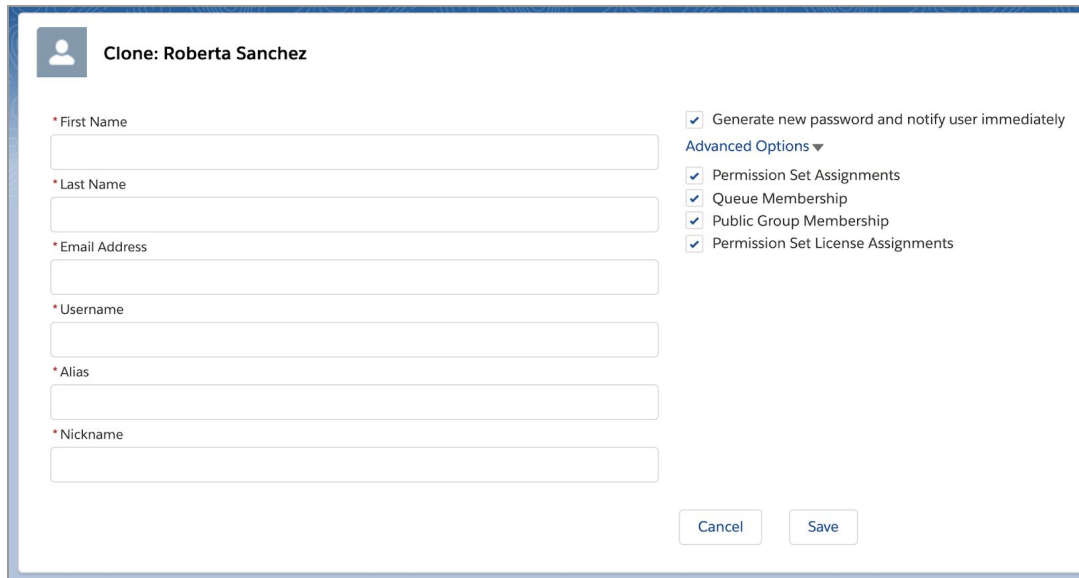2. Locate "Clone This User"
3. Click on "Clone This User"
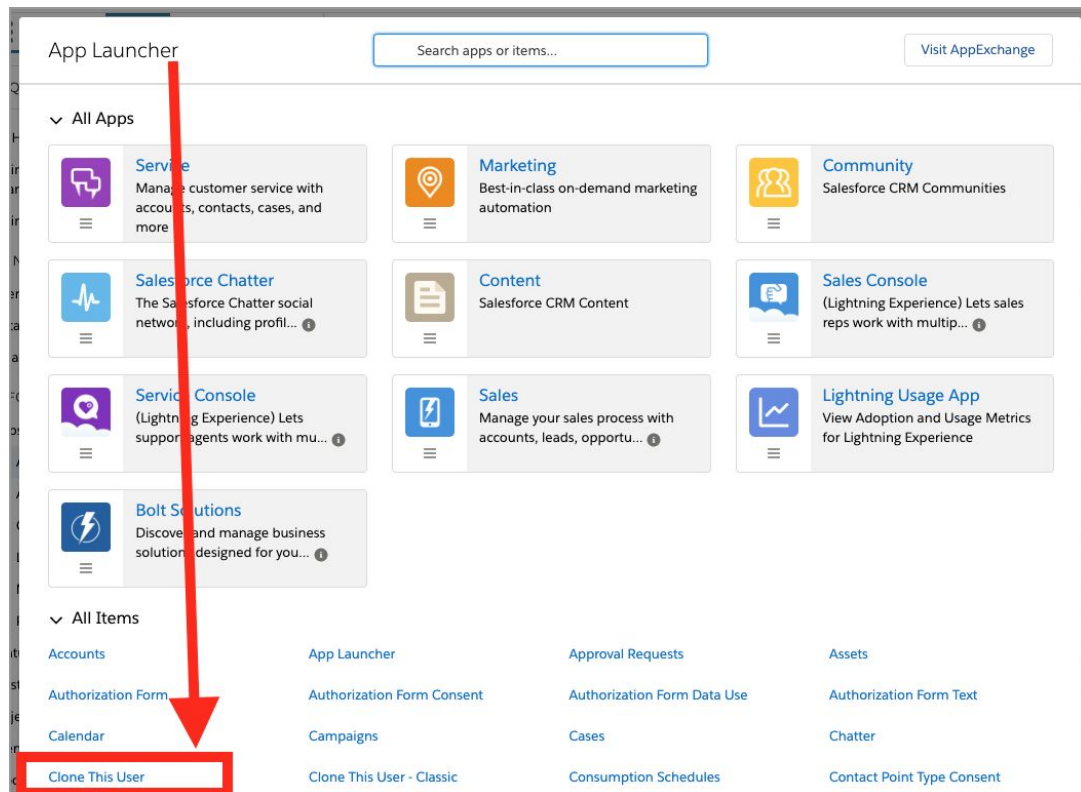


- ○ Note: "Clone This User - Classic" is best utilized in a Classic environment. If you are utilizing Lightning, we recommend using "Clone This User."

4. Enter the name of the User you need to clone
5. Click on the existing User

6. Enter the new User's unique information:
   ○ First Name, Last Name, Email Address
   ○ **NOTE:** This will auto-fill the Username, Alias, and Nickname based on expected Salesforce.com behavior. If your organization has different policies for these fields, you may edit the default Username, Alias, and Nickname.



7. Options (right-hand side):
   ○ You may deselect option to generate a new password and notify the new User
   ○ You may also review Advanced Options and deselect any values. Please note that unselected values will not be cloned.

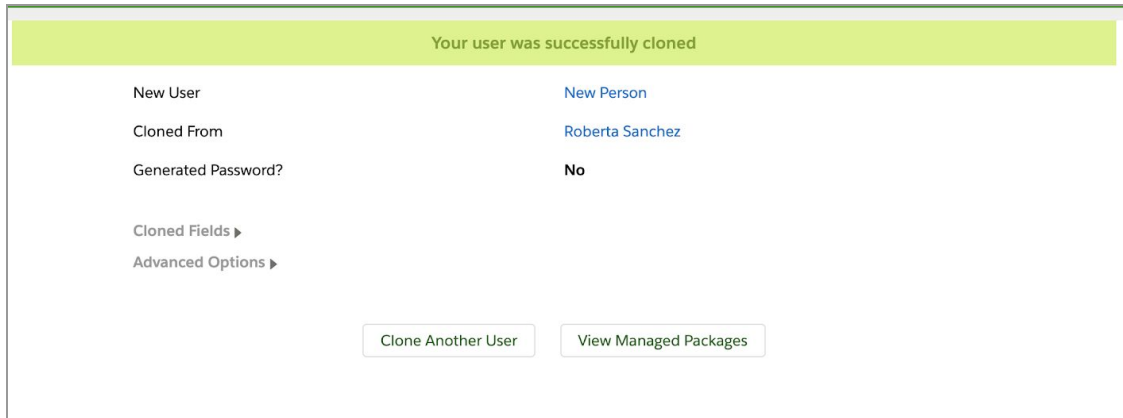8. Click "Save"
    ○ **NOTE:** If you do not have enough licenses of the type you are attempting to create, you will receive an error message similar to "You don't have enough Salesforce licenses to clone this user". You need to either deactivate existing users or contact your Salesforce.com Account Executive for more users.

What happens?
- Clone This User will create a new User with all Permission Sets, Public Groups, features, etc of the original User (unless you have specified otherwise through the Advanced Options feature).
- Also, unless optionally changed, the new User will receive the new password notification email from Salesforce.com support with new Username and temporary password.
- You will land on a confirmation page stating "Your user was successfully cloned." This page will have information about the newly created User, the original User that was cloned and a list of all the things that were cloned (such as fields and other assignments).
- Additionally, there is a link at the bottom of the confirmation page that will direct you to View Manage Packages in case you need to assign the new User to a managed package that requires a license.
- **NEW!** Click the link at the bottom to create another User.
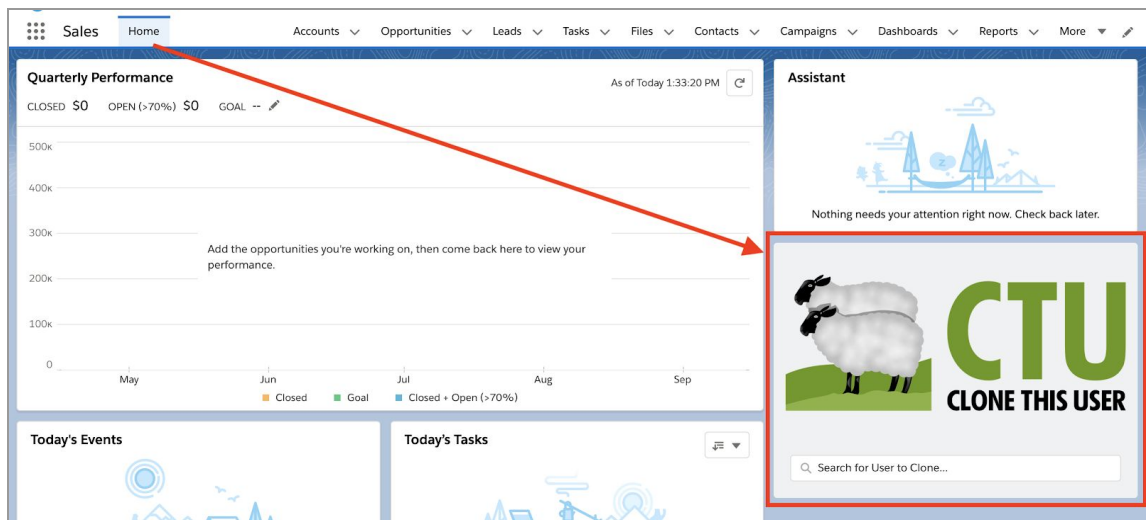
## Creating a User from the Lightning Page Component

You can add Clone This User to any Lightning Page by dragging and dropping the component to the page. For more details on installation, please check out our Installation Guide for Lightning.

To create a User from the Lightning Component:
1. Locate the component on the page



2. Enter the name of the existing User you need to clone
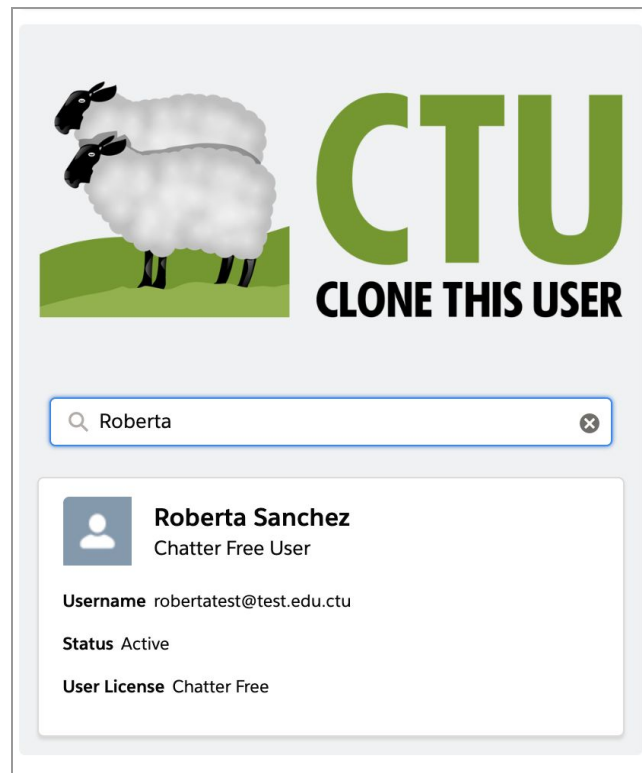
3. Select the existing User
4. Enter the new User's unique information:
    ○ First Name, Last Name, Email Address
    ○ *NOTE:* This will auto-fill the Username, Alias, and Nickname based on expected Salesforce.com behavior. If your organization has different policies for these fields, you may edit the default Username, Alias, and Nickname.

5. Options (underneath):
   ○ You may deselect option to generate a new password and notify the new User
   ○ You may also review Advanced Options and deselect any values. Please note that unselected values will not be cloned.

6. Click "Save"
   **NOTE:** If you do not have enough licenses of the type you are attempting to create, you will receive an error message similar to "You don't have enough Salesforce licenses to clone this user". You need to either deactivate existing users or contact your Salesforce.com Account Executive for more users.

What happens?

- Clone This User will create a new User with all Permission Sets, Public Groups, features, etc of the original User (unless you have specified otherwise through the Advanced Options feature).
- Also, unless optionally changed, the new User will receive the new password notification email from Salesforce.com support with new Username and temporary password.
- You will land on a confirmation page stating "Your user was successfully cloned." This page will have information about the newly created User, the original User that was cloned and a list of all the things that were cloned (such as fields and other assignments).
- Additionally, there is a link at the bottom of the confirmation page that will direct you to View Manage Packages in case you need to assign the new User to a managed package that requires a license.
- *NEW!* Click the button at the bottom to create another User.

| Your user was successfully cloned | |
|---|---|
| New User | New Person |
| Cloned From | Roberta Sanchez |
| Generated Password? | No |

Cloned Fields ▶
Advanced Options ▶

[ Clone Another User ]   [ View Managed Packages ]

- ○ You can review:
  - ■ New User - Hyperlink to review
  - ■ Cloned From - Hyperlink to review
  - ■ Generated Password? - Yes or No depending on your previous selection
  - ■ Cloned Fields - Expand to see which fields were cloned to the new User
  - ■ Advanced Options - Expand to see any of the advanced options you selected previously
- ○ "Clone Another User"
  - ■ Click this button to Clone another User
  - ■ Or click the navigation menu to return to Salesforce
- ○ "View Managed Packages"
  - ■ In case you need to assign the new user to a managed package that requires a license

# Creating a User from the Utility Bar

When Clone This User is installed, you can add it as a Utility Item for any app. For details on how to add Clone This User as a utility item, please see our Installation Guide for Lightning.
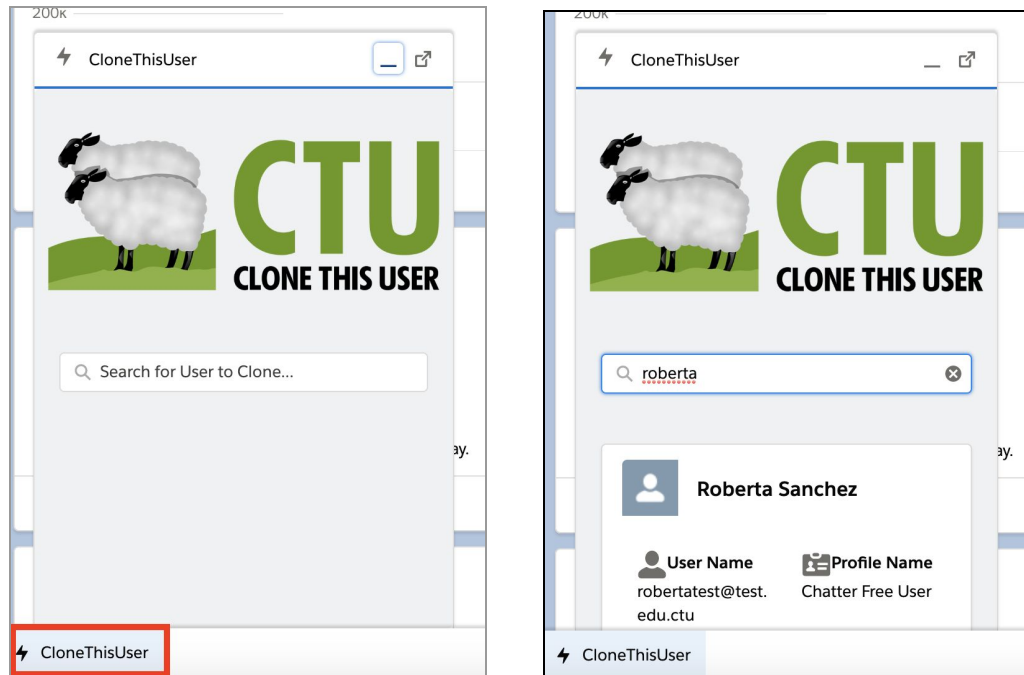
To add Users through the utility item, follow these steps:
   1. Locate utility items (bottom of the page)
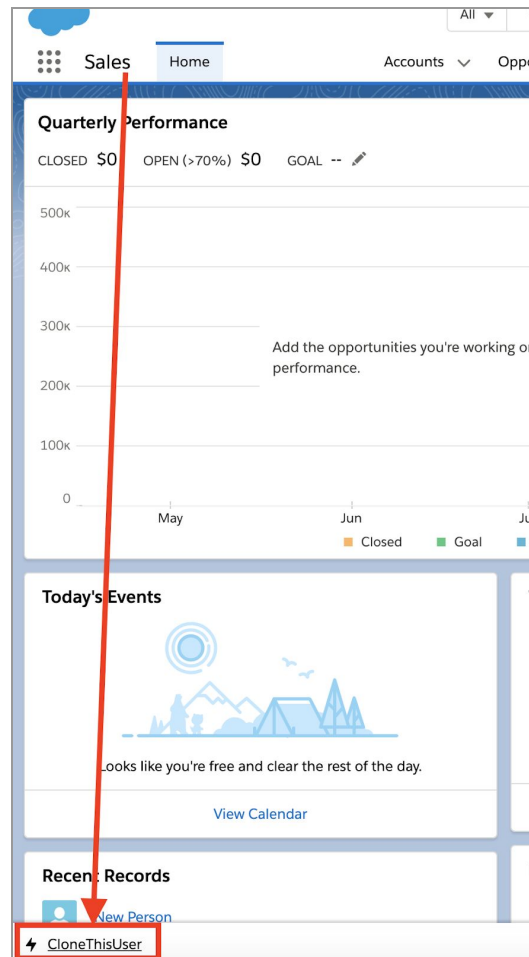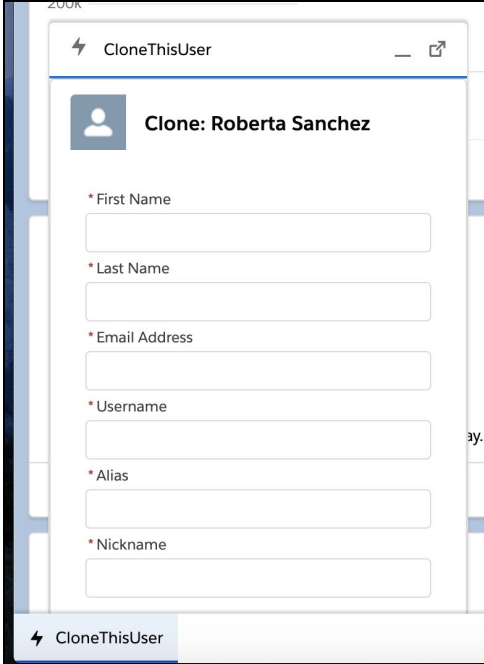


   2. Locate "Clone This User"
   3. Click to open Clone This User

4. Enter the name of the existing User you need to clone and select them




5. Enter the new User's unique information:
   - First Name, Last Name, Email Address
   - ***NOTE:*** This will auto-fill the Username, Alias, and Nickname based on expected Salesforce.com behavior. If your organization has different policies for these fields, you may edit the default Username, Alias, and Nickname.
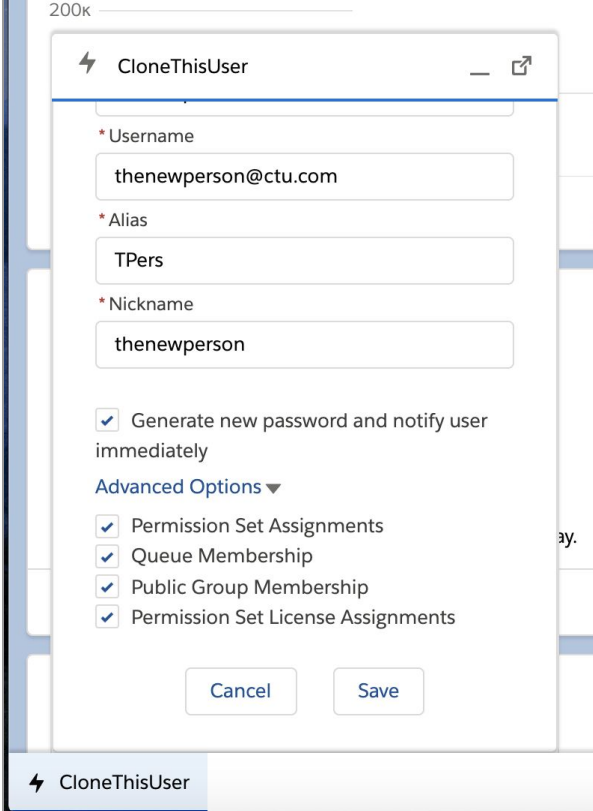
6. Options (underneath):
   ○ You may deselect option to generate a new password and notify the new User
   ○ You may also review Advanced Options and deselect any values. Please note that unselected values will not be cloned.

7. Click "Save"
   ○ **NOTE:** If you do not have enough licenses of the type you are attempting to create, you will receive an error message similar to "You don't have enough Salesforce licenses to clone this user". You need to either deactivate existing users or contact your Salesforce.com Account Executive for more users.

What happens?
- Clone This User will create a new User with all Permission Sets, Public Groups, features, etc of the original User (unless you have specified otherwise through the Advanced Options feature).
- Also, unless optionally changed, the new User will receive the new password notification email from Salesforce.com support with new Username and temporary password.
- You'll land on a confirmation page stating "Your user was successfully cloned." This page will have information about the newly created User, the original User that was cloned and a list of all the things that were cloned (such as fields and other assignments).
- Additionally, there is a link at the bottom of the confirmation page that will direct you to View Manage Packages in case you need to assign the new User to a managed package that requires a license.
- **NEW!** Click the link at the bottom to create another User.
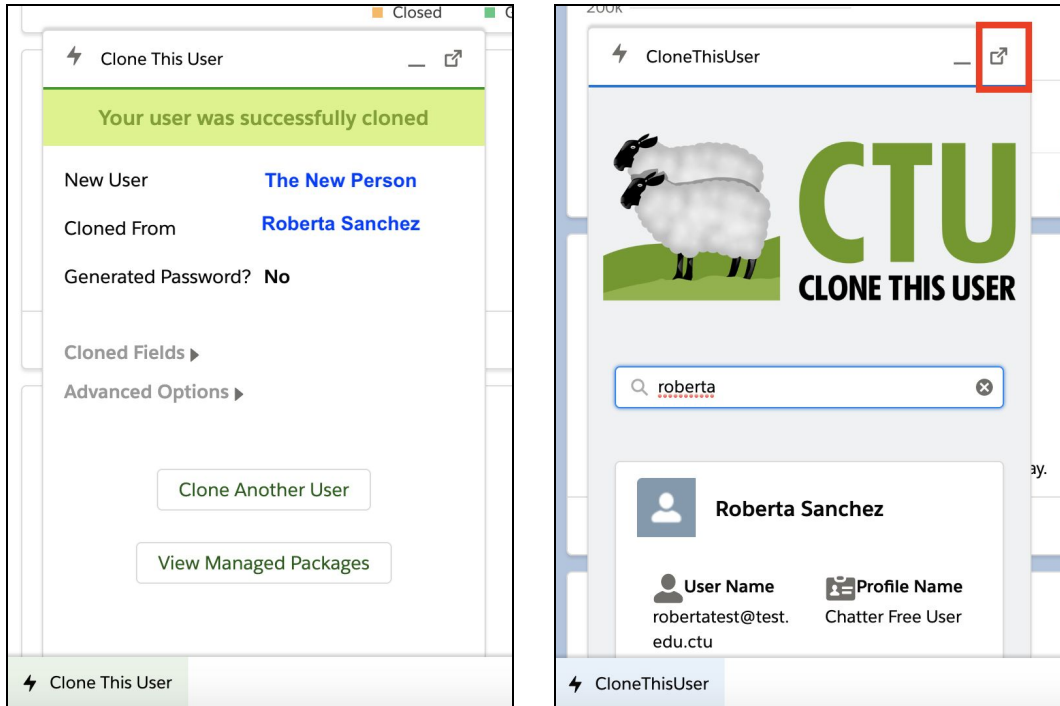
**Special Note about Clone This User in the Utility Bar:**

Try the pop-out and place Clone This User next to your document or spreadsheet or email (or any place where you are referencing the new User's info).

# Known Limitations

Clone This User can only create 1 user at a time and clones most everything except the fields Salesforce.com requires as unique, like Username. Where there are fields or related information that CTU does not clone, the new user record will have blank values instead.

See the table below for more information:

| Things CTU Clones | Things CTU Doesn't Clone |
|---|---|
| **Fields** | **Fields** |
| Call Center | Accessibility Mode |
| Company | Color-Blind Palette on Charts |
| Email Encoding | Make Setup My Default Landing Page |
| Manager | Force.com Quick Access Menu |
| Language | Show View State in Development Mode |
| Locale | Checkout Enabled |
| Profile | Title |
| Role | Department |
| Timezone | Division |
| Work.com User | Phone |
| Marketing User | Extension |
| Offline User | Fax |
| Force.com Flow User | Mobile |
| Salesforce1 User | Employee Number |
| Salesforce CRM Content User | Federation ID |
| Development Mode | End of Day |
| Allow Forecasting | Start of Day |
| Receive Salesforce CRM Content Alerts | Data.com User Type |
| Receive Salesforce CRM Content Alerts as Daily Digest | Salesforce Classic User |
| Knowledge User | Send Apex Warning Emails |
| Address | Receive Approval Request Emails |
| Newsletter | Mobile Configuration |
| Admin Newsletter | Hourly Login Limit |
| Site.com Contribution User | |
| Site.com Publisher User | |
| Data.com Monthly Addition Limit | |
| Delegated Approver | |

| Related Information | Related Information |
|---|---|
| Permission Set Assignments | Personal Groups |
| Permission Set License Assignments | Outlook Configuration Assignment |
| Public Group Membership | |
| Queue Membership | |

When cloning a User, the license type is not changeable due to a Salesforce limitation (e.g. a Chatter Internal User cannot be cloned as a Chatter Plus user).

## Other Details

Clone This User will clone active as well as inactive Users. Once a new User is cloned, it is created, active, and ready for use.

## 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 www.arkusinc.com.