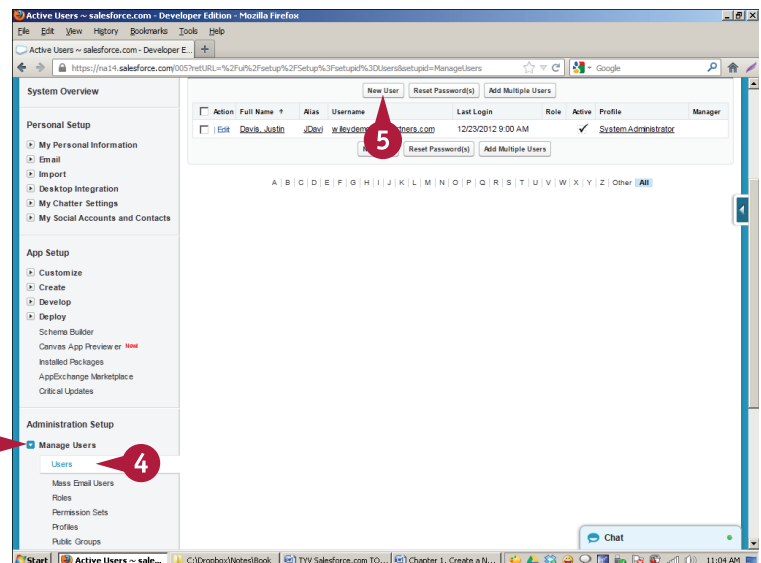
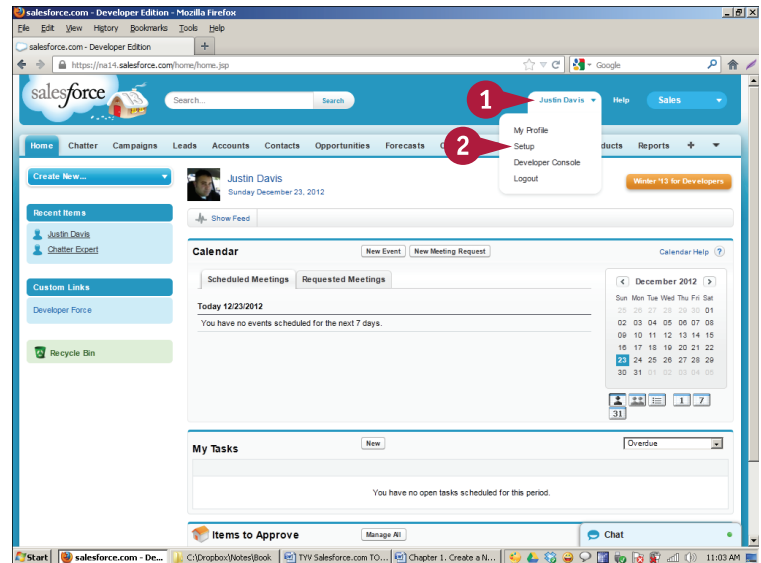


Create a New User

You must create users before your team can use Salesforce. Each user needs to have an available license. If you run out of licenses, you must deactivate a user before you can create a new one. To view which licenses are available, click the **Company Profile** tab in Salesforce or contact your salesforce.com account executive. When you create a user, you assign the user a *role*, which defines his job function; and a *profile*, which specifies whether he is a standard user or an administrator who can customize, set up, or extend Salesforce.

Create a New User

- 1 Click your name.
- 2 Click **Setup** to navigate to the configuration area.
- 3 Click the **Manage Users** .
- 4 Click **Users** to display user management options.
- 5 Click **New User**.



- 6 Fill in all the text fields marked in red with the user's details.
- 7 In the Profile drop-down list, click **Standard User**.

Note: You can select other profiles for other types of users, such as administrators.

- 8 Click the **Marketing User** check box (☐ changes to ☒) to give the user access to your organization's marketing tools.
- 9 Click the **Offline User** check box (☐ changes to ☒) to give the user offline access.

Note: Salesforce supports offline access through a file synchronization briefcase feature, discussed in the second Tip in this section.

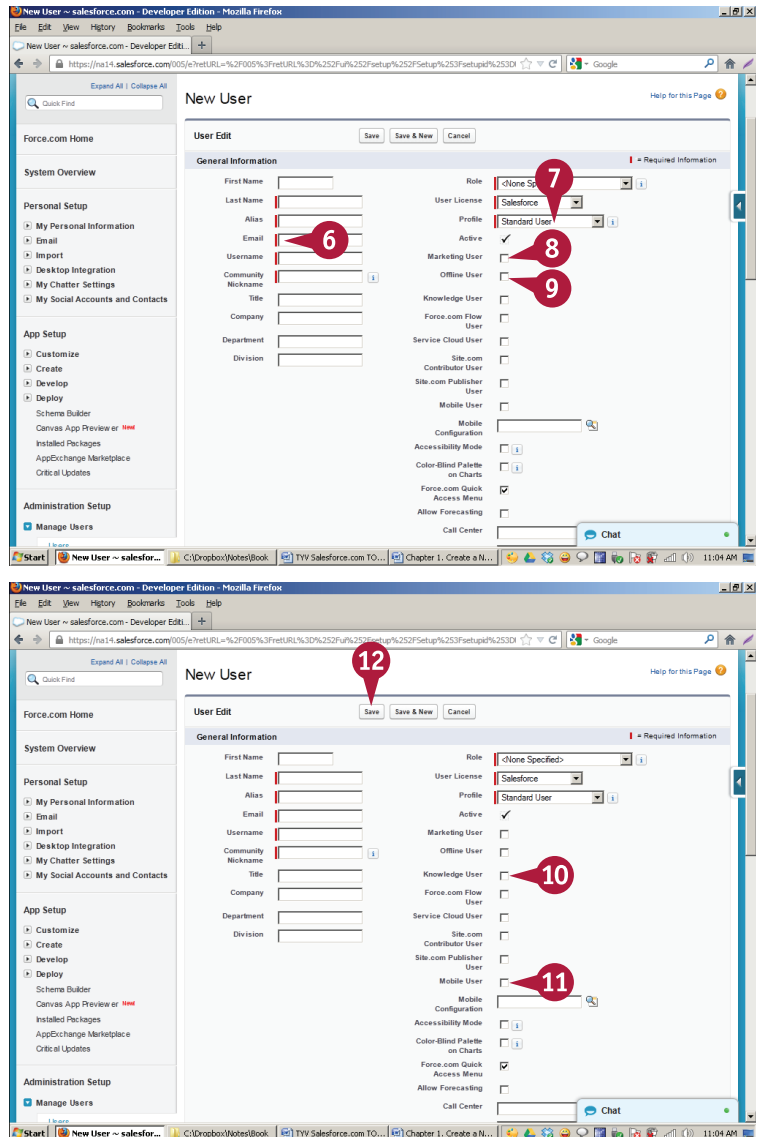
- 10 Click the **Knowledge User** check box (☐ changes to ☒) if the user needs to make changes to Knowledge Base articles.
- 11 Click the **Mobile User** check box (☐ changes to ☒) if the user needs to access Salesforce from a mobile device.
- 12 Click **Save**.

Note: Salesforce sends an e-mail to the new user with the user's username, login link, and temporary password.

TIPS

How do I create a new system administrator?

The default account created for you by Salesforce gives you administrator privileges. You can give other users the same privilege by selecting the System Administrator profile for a user when you create the user's account.



How do I access the offline tool?

With Salesforce Connect Offline, you can access Salesforce without an Internet connection. The program can be installed on your computer from the My Personal Information area in setup. The Connect Offline records are referred to as the *briefcase* and must be set up by an administrator. The records are synced with Salesforce when you are next online.