Arkus

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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 & password immediately. And 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 about what gets cloned and better visibility of the cloned items.

We have included an Advanced Options drop down menu that allows the administrator to select what values get cloned and which do not. Additionally, we have redesigned the confirmation page to include a lot of information about the clone and a link to managed packages at the end of the page.

Using Clone This User

During installation, the administrator will install the custom mobile app and the custom link for the user record. Once set up from the installation package, there are a few configuration instructions to add to the mobile or user record layout. Once install & configuration is complete, these instructions will walk the user through cloning users.
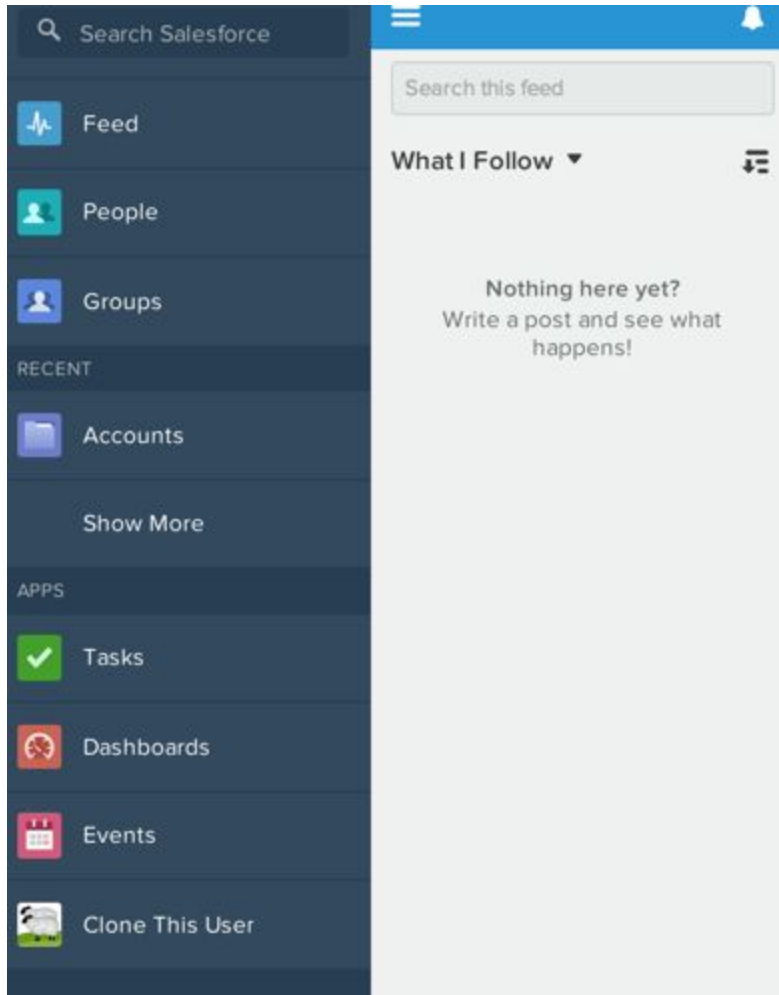
Creating a User from the Mobile Device

1. From the Navigation Menu in the upper left of the Salesforce1 phone app, select Clone This User.
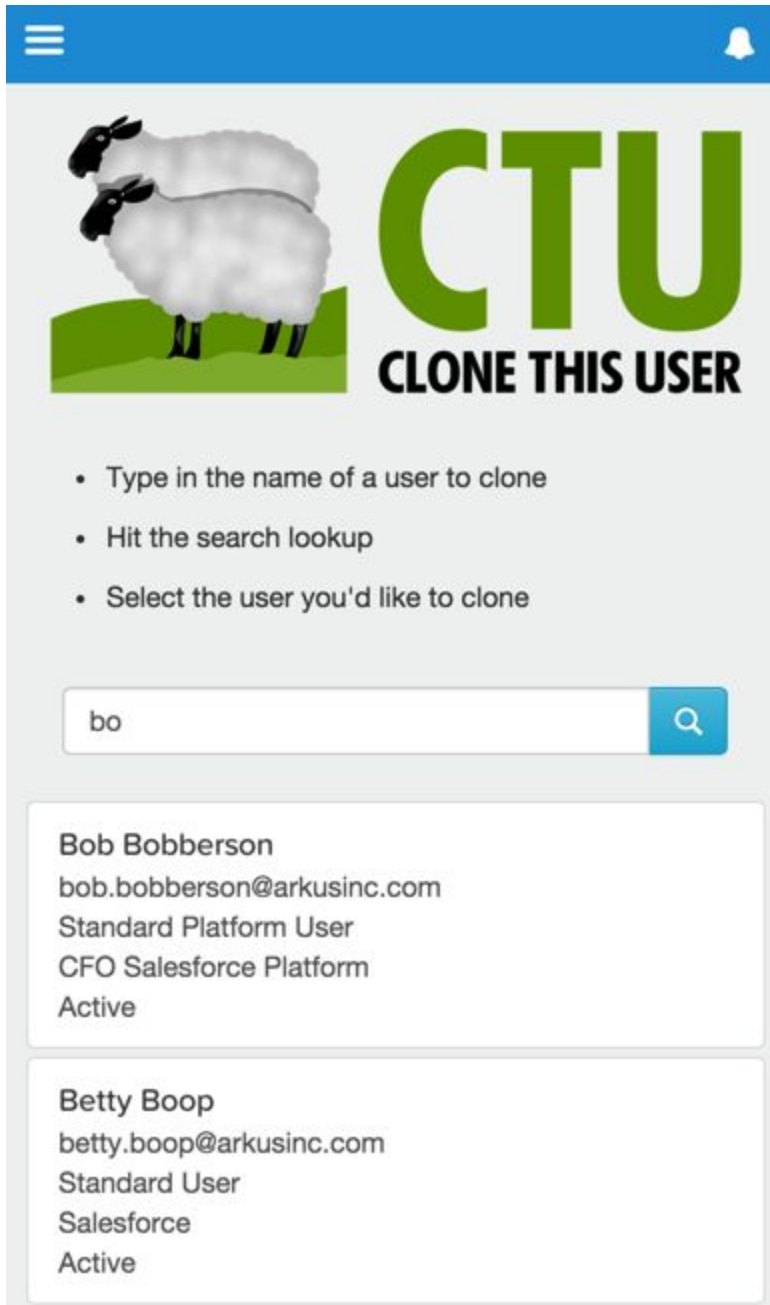
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2. From the the lookup, search for the name of the existing user you'd like to clone. From the results, select the one user to base the cloned user from. It is important to note that you will only be able to clone within the same Salesforce.com license type. See below section for more information on known limitations.

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3. Enter the new user's unique information for First Name, Last Name, and Email Address.

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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.

4. You may optionally deselect the option to notify the new user.
5. You may also optionally click Advanced Options to specify values to include or exclude from being cloned. Please note that unselected values will not be cloned.
6. After adding values to the fields on the Clone page, once you're ready to create the new user, select **Clone**.
   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.

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7. Clone This User will completely create the 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.

8. Confirmation: 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 d to assign the new user to a managed package that requires a license.

Creating a User from the Browser

1. From the Setup Menu in the Setup area of Salesforce.com, navigate to the user you need to clone.

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2. From the user's record, select the Clone link at the bottom of the User record detail to begin Clone This User. It is important to note that you will only be able to clone within the same Salesforce.com license type. See the next section for more information on known limitations.

3. Enter the new user's unique information for First Name, Last Name, and 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.

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4. You may optionally deselect the option to notify the new user.
5. You may also optionally click Advanced Options to specify values to include or exclude from being cloned. Please note that unselected values will not be cloned.
6. After adding values to the fields on the Clone page, once you're ready to create the new user, select **Clone**.
   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.
7. Clone This User will completely create the 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 standard new password notification email from Salesforce.com support with new user name and temporary password.
8. Confirmation: 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 d to assign the new user to a managed package that requires a license.

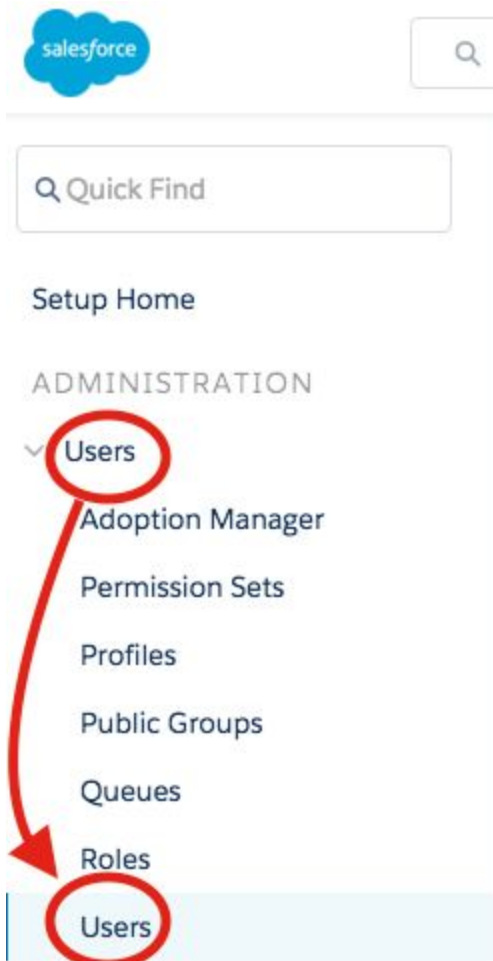## How to access CTU within Lightning Experience

Clone This User is fully functional when accessed through the new Lighting Experience. All the steps remain the same, except how navigate to **Setup** using the desktop version. Follow the steps below:

1. In the top right hand corner of your screen Click ⚙ , then select **Setup Home**

2. Under Administration select **Users**.

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 below table 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).

Provide Arkus Feedback

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

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If you are interested in learning more about Arkus and additional applications that we have developed, view the link below.

http://www.arkusinc.com/products/

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