



# Clone This User - User Guide for Classic

December 25, 2021 - Version 3.3

This product is 100% native to Salesforce so inherits all the security, compliance, and regulatory conditions provided by Salesforce. Arkus does not provide any other security documentation.

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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.

## Release Notes - Version 3.3 (Winter 22)

In addition to the existing features listed below, these new features are available in Clone This User as of this Winter 2022 release:

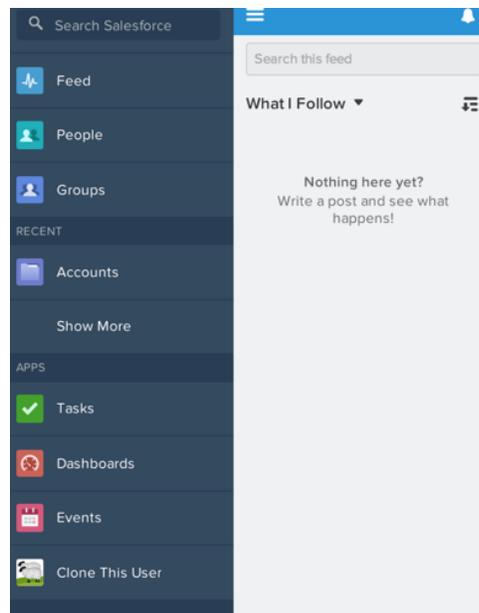
- New user receives “Welcome to Salesforce: Verify your account” email.

## Using Clone This User

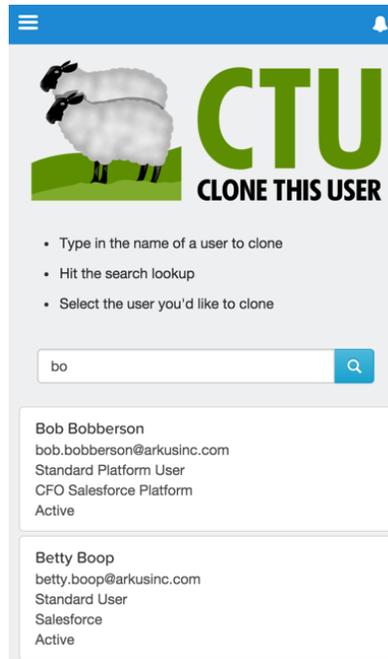
During installation, the administrator will install the custom mobile app and the custom link for the user record. Once set up from the installation package, there are a few configuration instructions to add to the mobile or user record layout. Once install & configuration is complete, these instructions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

### Creating a User from the Mobile Device

1. From upper left Navigation Menu in the Salesforce1 phone app, select Clone This User.



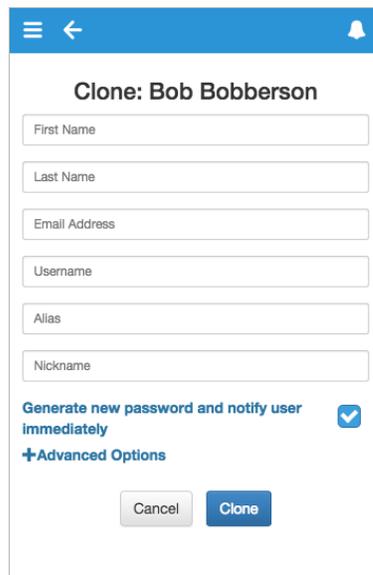
2. From the lookup, search for the name of the existing user you'd like to clone. From the results, select the one user to base the cloned user from. It is important to note that you will only be able to clone within the same Salesforce.com license type. See below section for more information on known limitations.



The screenshot shows the CTU (Clone This User) search interface. At the top, there is a blue header with a menu icon and a notification bell. Below the header is a banner with a sheep icon and the text "CTU CLONE THIS USER". A list of instructions is provided: "Type in the name of a user to clone", "Hit the search lookup", and "Select the user you'd like to clone". A search input field contains the text "bo" and a search icon. Below the search field, two user profiles are listed:

- Bob Bobberson**  
bob.bobberson@arkusinc.com  
Standard Platform User  
CFO Salesforce Platform  
Active
- Betty Boop**  
betty.boop@arkusinc.com  
Standard User  
Salesforce  
Active

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



The screenshot shows the "Clone: Bob Bobberson" form. The form has a blue header with a menu icon, a back arrow, and a notification bell. The title "Clone: Bob Bobberson" is centered at the top. Below the title are several input fields: "First Name", "Last Name", "Email Address", "Username", "Alias", and "Nickname". A checkbox labeled "Generate new password and notify user immediately" is checked. Below the checkbox is a link for "+Advanced Options". At the bottom of the form are two buttons: "Cancel" and "Clone".

**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.
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 "Welcome to Salesforce: Verify your account" email from Salesforce.com support (support@salesforce.com) with their new Username and a link to set a new 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 to assign the new user to a managed package that requires a license.

**Your user was successfully cloned**

New User	Sally Sallerson
Cloned From	Bob Bobberson
Generated Password?	YES

**List of things cloned**

**Fields**

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Call Center	Company
Email Encoding	Manager
Language	Locale
Profile	Role
Timezone	Work.com User
Marketing User	Offline User
Force.com Flow User	Salesforce1 User
Salesforce CRM Content User	Development Mode
Allow Forecasting	Receive Salesforce CRM
	Content Alerts
Receive Salesforce CRM	Knowledge User
Content Alerts as Daily Digest	Address
Newsletter	Admin Newsletter
Site.com Contribution User	Site.com Publisher User
Data.com Monthly Addition Limit	Delegated Approver

**Advanced options**

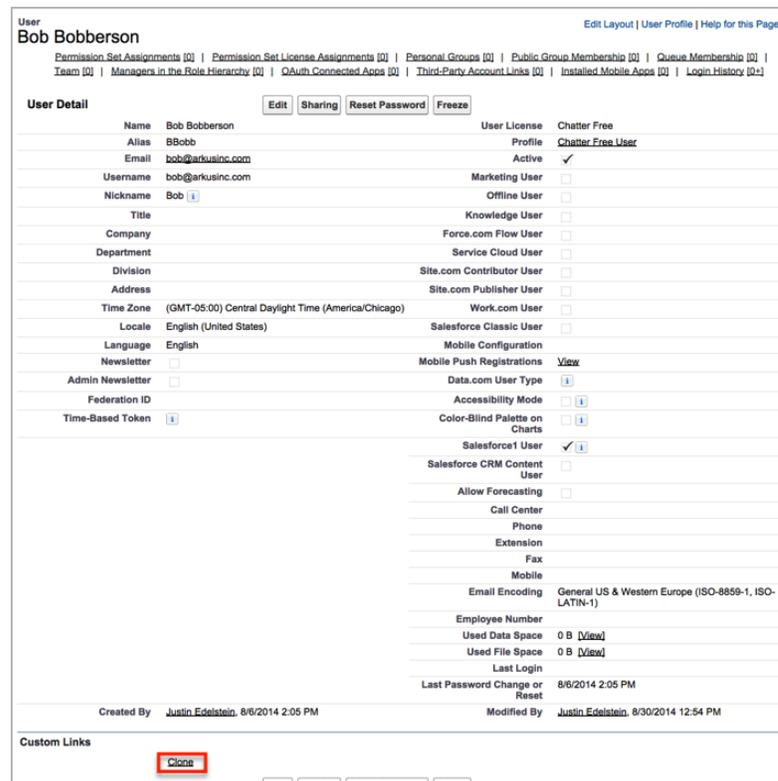
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- Permission Set Assignments
- Public Groups
- Queue Membership
- Permission Set License Assignments

[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 Browser

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



User: Bob Bobberson

Permission Set Assignments [0] | Permission Set License Assignments [0] | Personal Groups [0] | Public Group Membership [0] | Queue Membership [0] | Team [0] | Managers in the Role Hierarchy [0] | OAuth Connected Apps [0] | Third-Party Account Links [0] | Installed Mobile Apps [0] | Login History [0]

**User Detail** [Edit] [Sharing] [Reset Password] [Freeze]

Name	Bob Bobberson	User License	Chatter Free
Alias	BBobb	Profile	Chatter Free User
Email	bob@arkusinc.com	Active	<input checked="" type="checkbox"/>
Username	bob@arkusinc.com	Marketing User	<input type="checkbox"/>
Nickname	Bob	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Force.com Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
Address		Site.com Publisher User	<input type="checkbox"/>
Time Zone	(GMT-05:00) Central Daylight Time (America/Chicago)	Work.com User	<input type="checkbox"/>
Locale	English (United States)	Salesforce Classic User	<input type="checkbox"/>
Language	English	Mobile Configuration	
Newsletter	<input type="checkbox"/>	Mobile Push Registrations	<a href="#">View</a>
Admin Newsletter	<input type="checkbox"/>	Data.com User Type	<input type="checkbox"/>
Federation ID		Accessibility Mode	<input type="checkbox"/>
Time-Based Token	<input type="checkbox"/>	Color-Blind Palette on Charts	<input type="checkbox"/>
		Salesforce1 User	<input checked="" type="checkbox"/>
		Salesforce CRM Content User	<input type="checkbox"/>
		Allow Forecasting	<input type="checkbox"/>
		Call Center	
		Phone	
		Extension	
		Fax	
		Mobile	
		Email Encoding	General US & Western Europe (ISO-8859-1, ISO-LATIN-1)
		Employee Number	
		Used Data Space	0 B <a href="#">View</a>
		Used File Space	0 B <a href="#">View</a>
		Last Login	
		Last Password Change or Reset	8/6/2014 2:05 PM

Created By: Justin Edelman, 8/6/2014 2:05 PM Modified By: Justin Edelman, 8/30/2014 12:54 PM

Custom Links

[Clone](#)

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.
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.
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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.

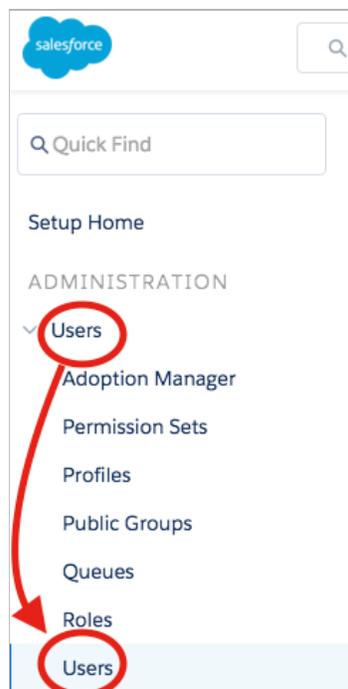
## How to access CTU within Lightning Experience

Clone This User is fully functional when accessed through the new Lightning Experience. All the steps remain the same, except how to 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**.



## Manage User Permissions for Non-Admin Users

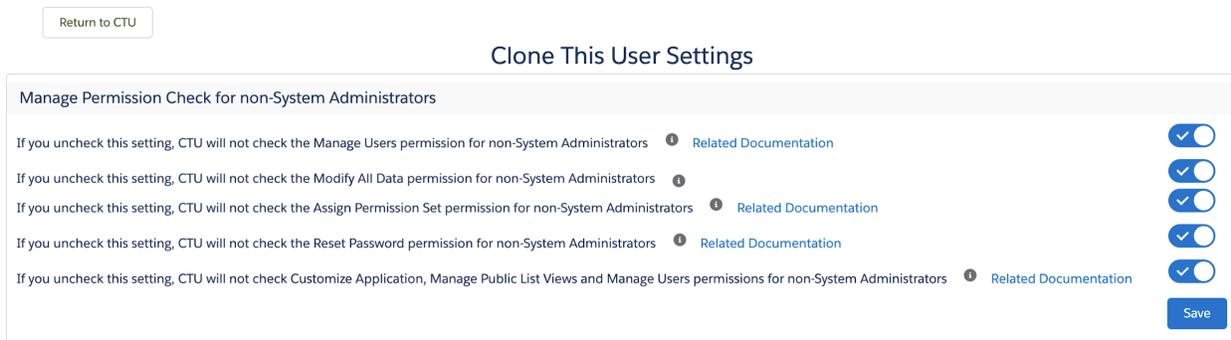
Please note that in order for a non-System Administrator user to be able to use all features of Clone This User they must have certain permissions assigned. Clone This User will enforce these permissions, but if a System Administrator wants to disable these security checks for

non-Admins the Settings page allows to manage this enforcement. The Settings page is only available to System Administrators.

1. Go to the CTU main page and click the gear in the top right corner.



2. The settings page will be displayed with all the permissions needed for each feature used by Clone This User and the ability to check or bypass such permission when non-System Administrators are using CTU.
  - a. Each permission has a link to the official Salesforce documentation and explanation why that permission is needed to perform certain tasks.



3. Save.
4. Click the “Return to CTU” button to go back to the CTU main page.
5. If a permission is checked and the non-Admin user does not have that permission, then some of the features to clone a user will be disabled:

Generate new password and notify user immediately	<input checked="" type="checkbox"/>
—Advanced Options	
Permission Set Assignments	<input checked="" type="checkbox"/>
Queue Membership	<input checked="" type="checkbox"/>
Public Group Membership	<input type="checkbox"/>
Permission Set License Assignments	<input checked="" type="checkbox"/>



## Known Limitations

CTU does not support cloning of Community Users so they are not displayed in the user search. Community Users must be created from a Contact.

Clone This User can only create 1 user at a time and clones almost 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.

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).

See the table on the following page for more information.

## Provide Arkus Feedback

If you need additional support related to this app or have an app issue to share with us, please reach out to [support@arkusinc.com](mailto:support@arkusinc.com) so we can assist you.

We also encourage you to let us and others know how Clone This User is working for you in a review on the Salesforce AppExchange. We are continually building upon Clone This User to increase its functionality and usefulness. We appreciate your feedback.

If you are interested in learning more about Arkus and our consulting services, visit us at [www.arkusinc.com](http://www.arkusinc.com) or contact us at [www2.arkusinc.com/contact](http://www2.arkusinc.com/contact). Please send requests for app support to the [support@arkusinc.com](mailto:support@arkusinc.com) email, not in the contact form.

Learn more about our other free app, The Permissioner, at <https://www2.arkusinc.com/thepermissioner>



Things CTU Clones	Things CTU Doesn't Clone
<b>Fields</b>	<b>Fields</b>
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	
<b>Related Information</b>	<b>Related Information</b>
Permission Set Assignments	Personal Groups
Permission Set License Assignments	Outlook Configuration Assignment
Public Group Membership	
Queue Membership	