



Clone This User - Installation 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.

Technical Requirements

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

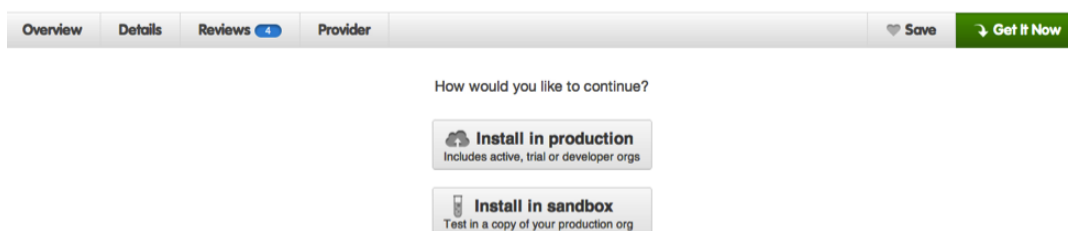
Support

For support related to Clone This User, you can email support@arkusinc.com or call (888) 271-1963 and leave a message with any questions or issues.

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.

1. Navigate to the link below in your browser and click **Get It Now**.
<https://appexchange.salesforce.com/listingDetail?listingId=a0N3000000B5jTkEAJ>
2. You are prompted to see if you have a Salesforce account, or you can log in as a guest, and in which environment you want to install Clone This User. We recommend that you install Clone This User to your Sandbox environment to test and evaluate the application before installing the package in your production environment. Click **Continue**.



3. Confirm that you have read the Terms & Conditions, and click **Install**. You will be prompted to verify your password before the Clone This User package begins the installation process.
4. The Package Installation Details page provides you information about what you are installing with the Clone This User package, and exactly where you are installing Clone This User. Confirm the information and **agree to the terms and conditions**. Then click **Confirm and Install** button.



Almost there!

i Before installing, please review the [customization guide](#) to familiarize yourself with the installation and configuration steps for this application.

WHAT YOU ARE INSTALLING

PACKAGE

Clone This User

VERSION

CTU: Clone This User (Summer 2015 / 1.1.0)

SUBSCRIPTION

Free

DURATION

Does Not Expire

NUMBER OF SUBSCRIBERS

Site-wide

WHERE YOU ARE INSTALLING

ORGANIZATION

Dodge Labs / Arkus

EDITION

Developer

USER NAME

rogeramitchell@gmail.com.advdev

☐ I have read and agree to the [terms and conditions](#) .

[Cancel Install](#) | [Back to previous step](#)

Confirm and Install!

Salesforce.com Inc. is not the provider of this application but has conducted a limited security review. Please [click here](#) for detailed information on what is and is not included in this review.

5. Choose the security level in Step 2 of the installation. We recommend that you **Grant access to 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. Click **Install** to start installing the package into your Salesforce environment.

NOTE: Professional Edition users will not have this step.



Install Clone This User

By Arkus, Inc.



☒ Install for Admins Only



☐ Install for All Users



☐ Install for Specific Profiles...

Install

Cancel

App Name	Publisher	Version Name	Version Number
Clone This User	Arkus, Inc.	Summer 2015	1.1

Description

With Clone This User (CTU), 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. Clone Users from the desktop or Salesforce1 Mobile.

Additional Details [View Components](#) [API Access](#)

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



Install Clone This User

By Arkus, Inc.



Installation Complete!

Done

App Name	Publisher	Version Name	Version Number
Clone This User	Arkus, Inc.	Summer 2015	1.1

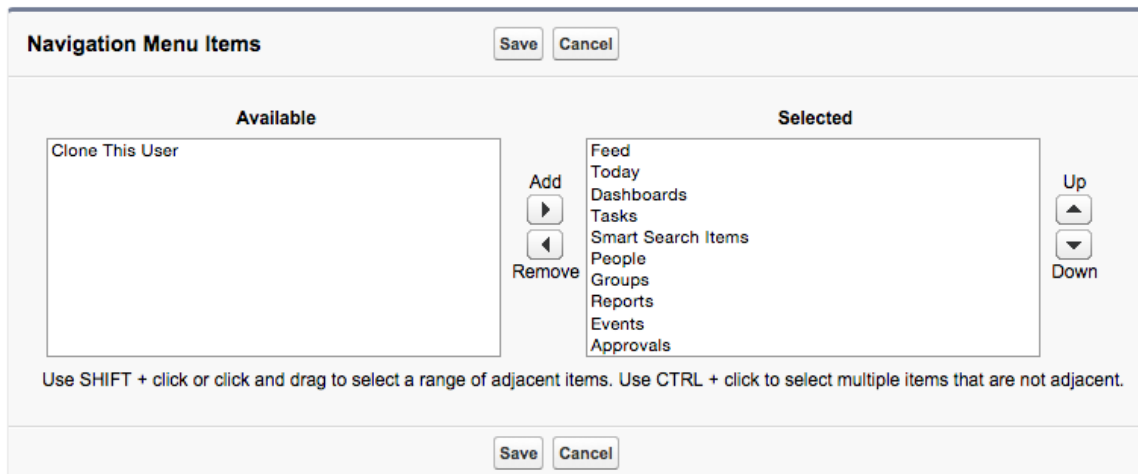
Description

With Clone This User (CTU), 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. Clone Users from the desktop or Salesforce1 Mobile.

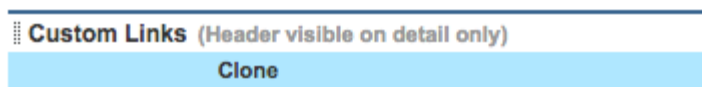
Mobile Setup

Now that you've completed the install of the package, you'll need to finish installation by setting up the package components.

1. In the Setup area, under Administer, click Mobile Administration and select Mobile Navigation.
2. Under Available Navigation Menu Items, select Clone This User and add the Clone This User item to the list of selected Navigation Menu Items and **Save**



3. Next, under Customize, click Users, and select Page Layouts.
4. On the User layout, select **Custom Links** and use the Quick Find in the editor to find the Clone link.



5. Drag it onto your page layout **Custom Links** section and **Save**.

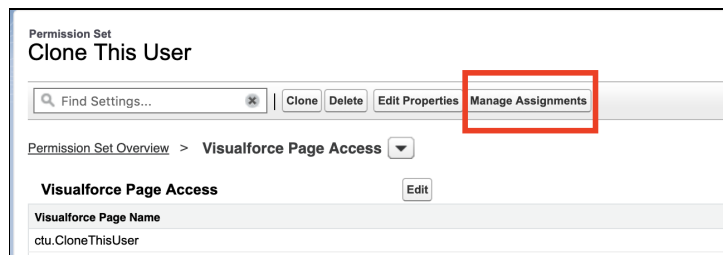


6. You are now ready to use Clone This User!

Grant Access to Non-Admin Users

Please note that in order for a non-System Administrator user to be able to use Clone This User they must be assigned a permission set to gain access to the necessary Visualforce pages. You also need to follow this step for delegated admins.

1. Setup → “Users” → “Permission Sets”
 - a. Or search “Permission Sets”
2. Search for the “Clone This User” Permission Set Label and select it.



Permission Set
Clone This User

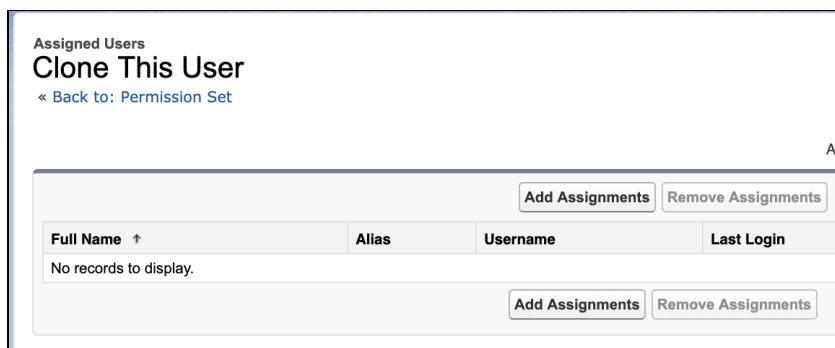
Find Settings... Clone Delete Edit Properties **Manage Assignments**

Permission Set Overview > Visualforce Page Access

Visualforce Page Access Edit

Visualforce Page Name
ctu.CloneThisUser

3. Select the “Manage Assignments” button.
4. Select the “Add Assignments” button and select the corresponding users:



Assigned Users
Clone This User

[Back to: Permission Set](#)

Add Assignments Remove Assignments

Full Name ↑	Alias	Username	Last Login
No records to display.			

Add Assignments Remove Assignments

		Assign Cancel								
☐ Action	Full Name	Alias	Username	Last Login	Role	Active	Profile	Manager		
☒ Edit Login	leper, leper	lleper	leper@leper.com		CEO	✓	Work.com Only User			
☒ Edit Login	Edelstein, Justin	jEdel	justin.edelstein@ctu.com	7/2/2020 12:22 AM		✓	System Administrator			
☐ Edit	Muino, Ignacio	imuino	ignacio.muino@arkusinc.com.ctu	7/6/2020 2:52 PM		✓	System Administrator			

5. Once you are done selecting the users, select the “Assign” button.
6. Done.



Bypassing Validation Rules on User Creation

The cloning process will be unsuccessful if you have an active validation rule on the User object and the rule's criteria aren't met. To bypass your validation rule when using CTU, any System Administrator can do the following:

1. Create a [Custom Permission](#). Name it something helpful such as "CTUBypass"
2. Add the Custom Permission to the "Clone This User" Permission Set (outlined above)
3. Go to the validation rule you want to bypass and add the following (substituting your Custom Permission name):
&& \$Permission.CTUBypass = FALSE

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 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 or contact us at www2.arkusinc.com/contact. Please send requests for app support to the support@arkusinc.com email, not in the contact form.

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