



Clone This User - Installation Guide for Lightning

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 into 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 even more flexibility in how to clone Users while in Lightning.



Note that there are two ways you can access Clone This User (in both Classic and Lightning):

1. Through Setup and on the User record (custom links)
2. Or through the AppLauncher by clicking the “Clone This User” object

New advancements for our Lightning roll-out include:

1. Adding Clone This User as a Lightning Component to any Page
2. Adding Clone This User as a utility item. The CTU utility item is great for the pop-out function (e.g. put Clone This User directly next to that spreadsheet you are referencing)

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:

- Issues with Save and Cancel buttons in Console view.
- Show better message when assigning inactive users to permission sets, groups, etc.
- ForecastEnabled prevents installation of the CTU package.
- Fixes on option to select default for checkbox fields.
- 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

- NOTE: Professional Edition may experience limited functionality in Lightning, we suggest using it in Classic.

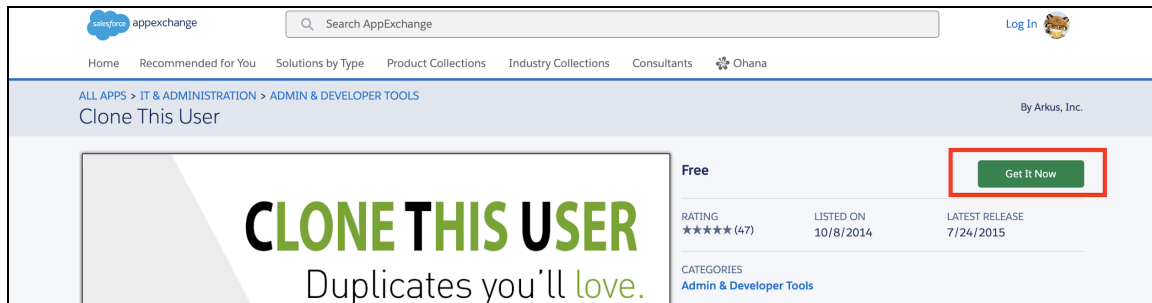
Support

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.

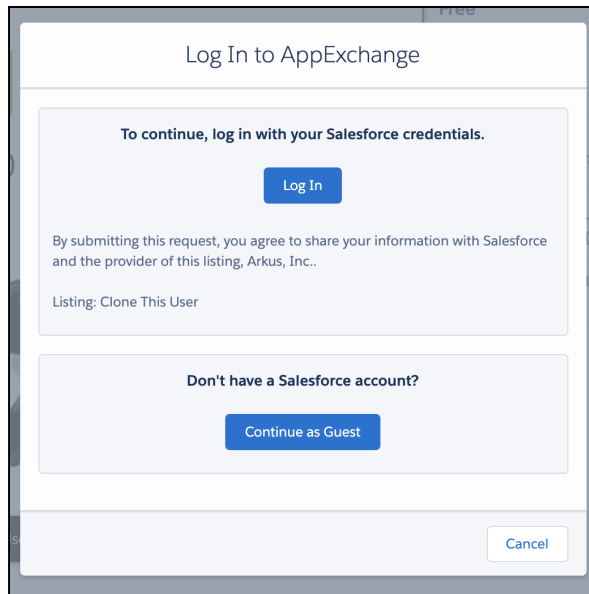
Installation Steps

Before beginning the installation process, verify that your organization has a supported version of Salesforce. To install Clone This User, follow the instructions below.

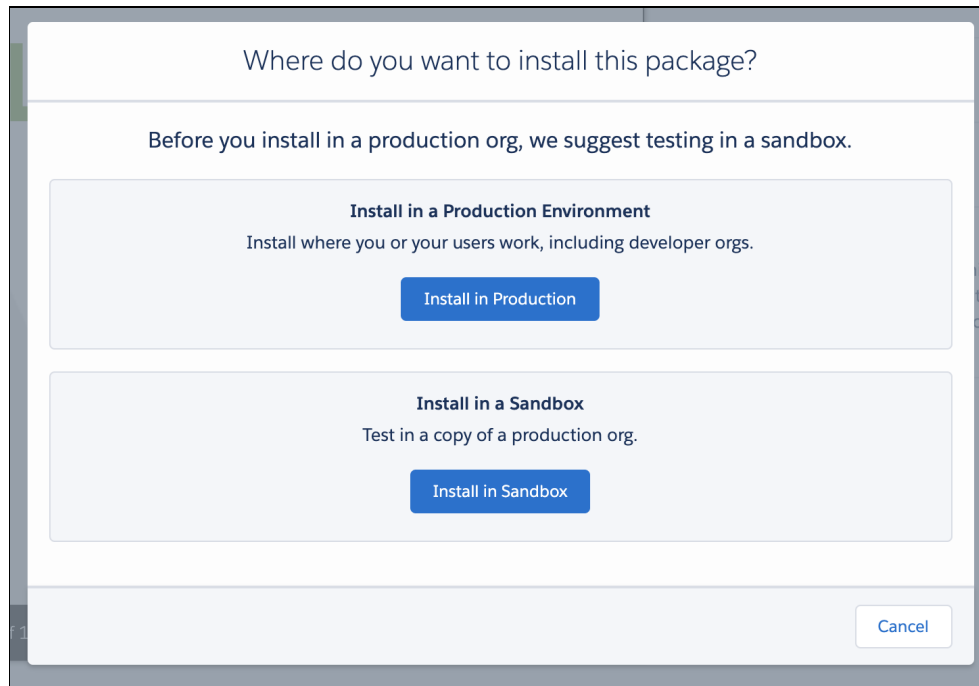
1. Navigate to this link:
<https://appexchange.salesforce.com/listingDetail?listingId=a0N3000000B5jTkEAJ>
2. Click “Get It Now”



3. Click "Log In"



4. Select the appropriate installation option (Production or Sandbox)



Where do you want to install this package?

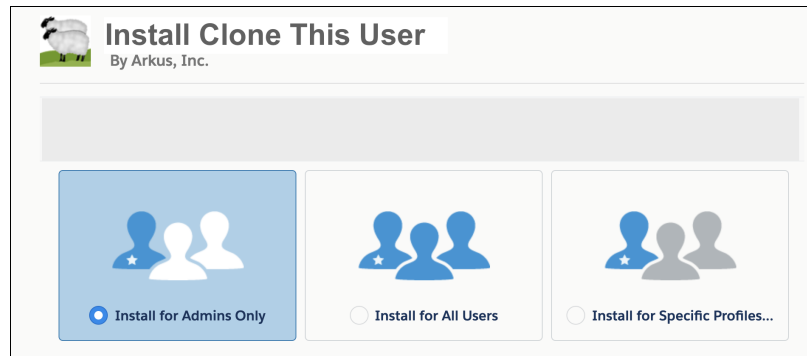
Before you install in a production org, we suggest testing in a sandbox.

Install in a Production Environment
Install where you or your users work, including developer orgs.
[Install in Production](#)

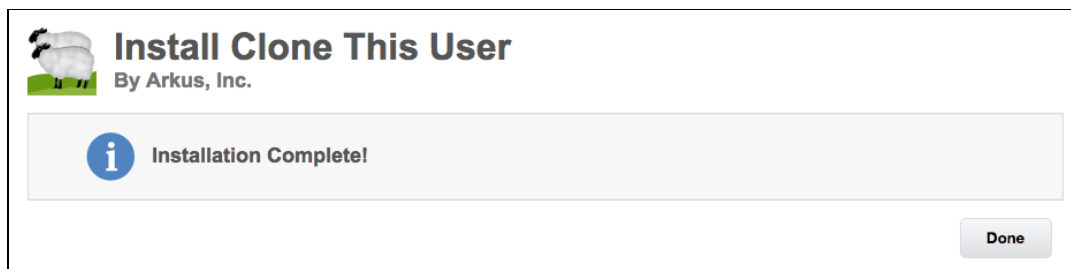
Install in a Sandbox
Test in a copy of a production org.
[Install in Sandbox](#)

[Cancel](#)

5. Confirm your details
 - You may have to edit/update your Title and other credentials
 - Click “Save” when you have finished those steps
6. Click “Confirm and Install”
 - Salesforce will have you log into your environment again to confirm your identity
7. Select your security level
 - We recommend that you “Install for Admins Only”, as Clone This User will likely be used by system administrators. Instructions for granting use of Clone this User to specific non-administrator users are below.
 - Alternatively, you can “Install for All Users” or “Install for Specific Profiles” which will allow you to provide access for your specific needs.



8. Click “Install” to start installing the package into your Salesforce environment.
 - NOTE: Professional Edition users will not have this step
9. After the installation occurs, you will see the Installation Complete page notifying you that the package installed has been successful

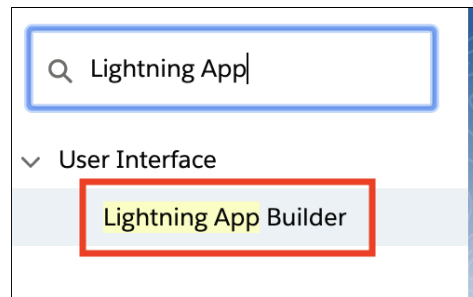


Lightning Component

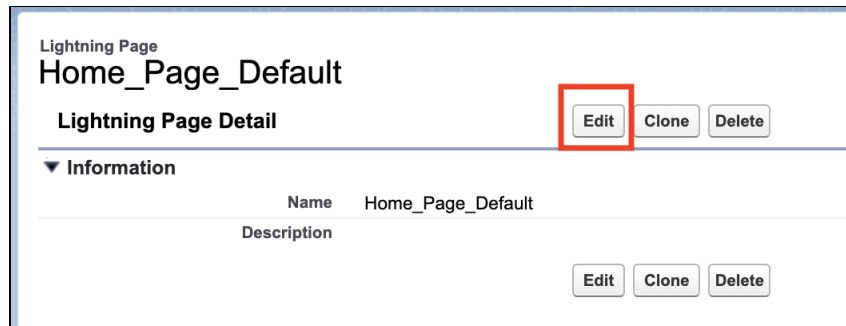
With our Lightning release, you can now add Clone This User to any Lightning page. We recommend the Home page for those Users that are cloning frequently.

Note: You will need to enable My Domain to utilize any Custom Lightning Component. To learn how to enable My Domain, [view Salesforce's documentation here](#).

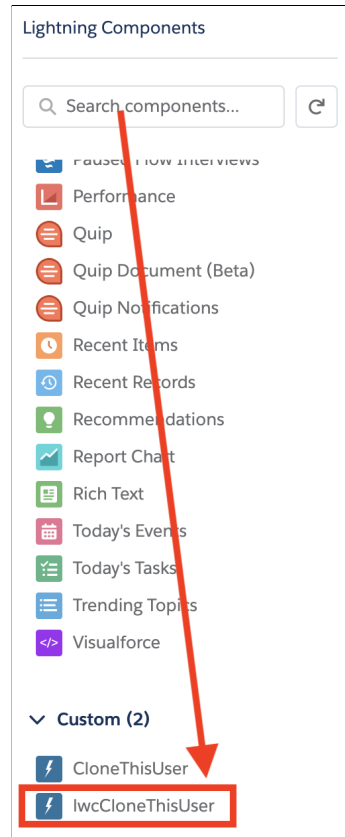
1. In Setup → search for and select “Lightning App Builder”



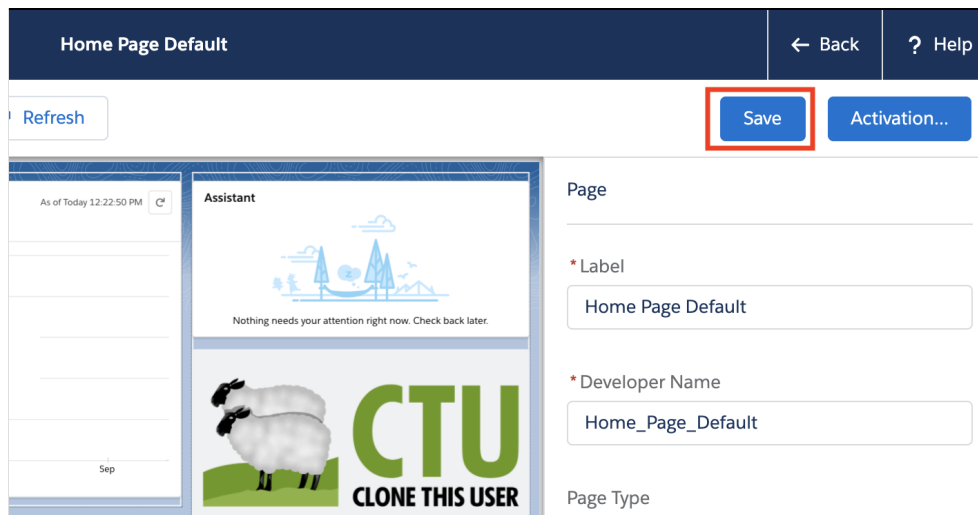
2. Select the Lightning page where you need to add Clone This User
3. Click “Edit”



4. Under “Custom”, locate “lwcCloneThisUser”
 - Note: There are 2 components for Clone This User
 - “CloneThisUser” is the original component that does not contain our upgrades/changes
 - Please use “lwcCloneThisUser” instead
 - The acronym “lwc” stands for Lightning Web Component



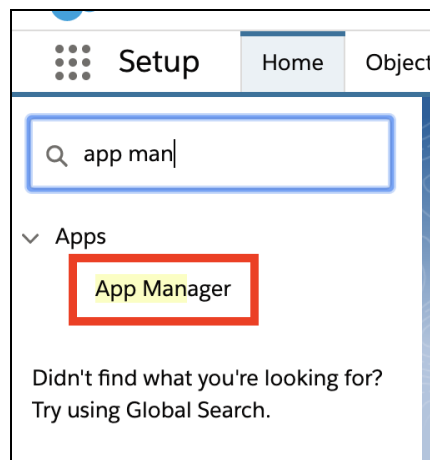
5. Drag the “lwcCloneThisUser” component to the page and click “Save”



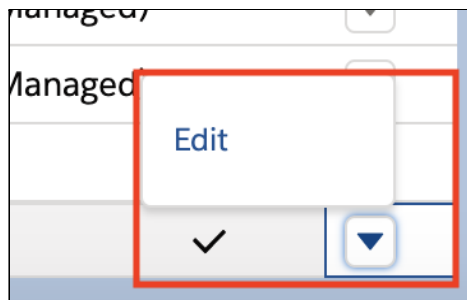
Lightning Utility Bar

Another addition to our Lightning rollout includes the use of the Lightning utility bar. The pop-out function is a great tool if you are referencing a document/spreadsheet for your new User's details. To enable the utility bar pop-out function, be sure to complete [this associated Critical Update](#) from the Salesforce Spring '19 release.

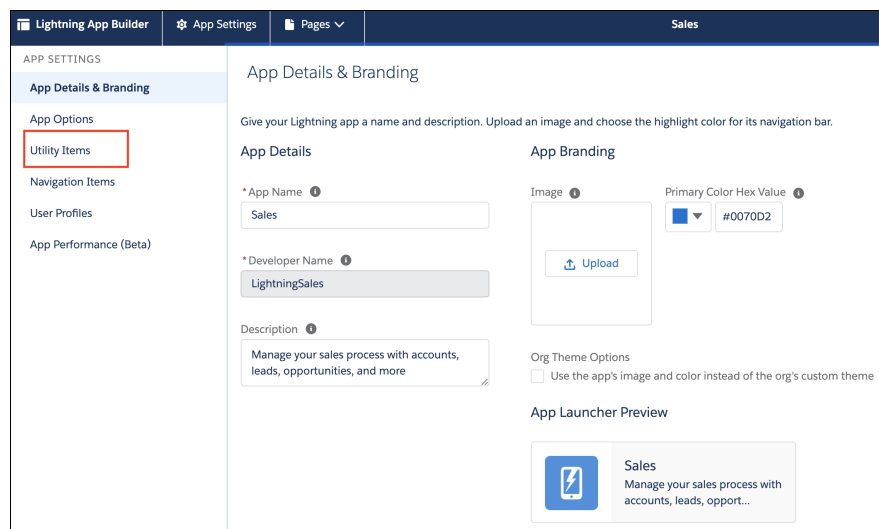
1. In Setup → search for and select “App Manager”



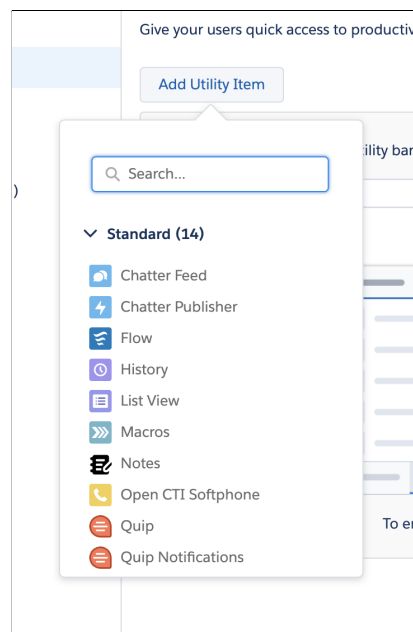
2. Locate the App where you would like to add the Utility Bar
3. Select the drop-down arrow → Click “Edit”



4. Locate “Utility Items” in the left panel

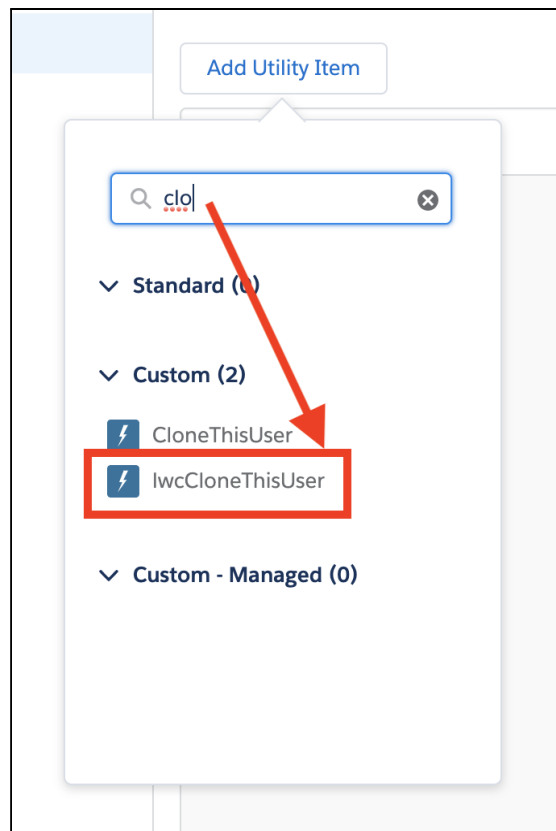


5. Click “Add Utility Item”



6. Type “Clone This User”

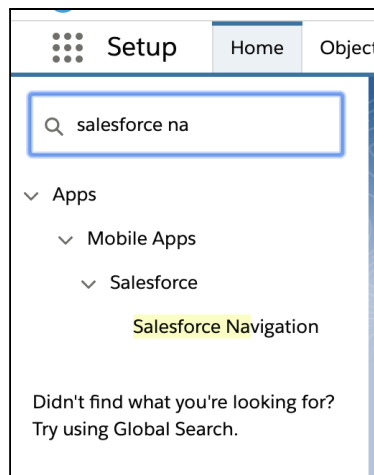
7. Under “Custom” select “lwcCloneThisUser”
 - Note: There are 2 components for Clone This User
 - “CloneThisUser” is the original component that does not contain our upgrades/changes
 - Please use “lwcCloneThisUser” instead
 - The acronym “lwc” = Lightning Web Component
8. Leave the default Properties as they are
 - Note: It is safe to change the “Label” and “Icon,” but for best use leave the width and height as is. You do not need to check the “Start automatically” checkbox.
 - For the Label, we recommend changing it to “Clone This User”
 - For the icon, we recommend “adduser”
9. Click “Save”



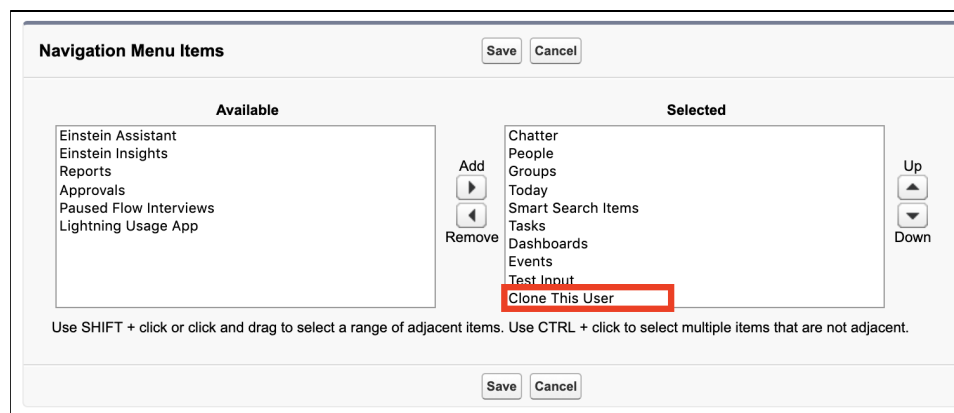
Mobile Setup in Lightning

Now that you've completed the install of the package, if you would like CTU to be available on mobile devices, you'll need to follow these steps:

1. In the Setup → search for and select “Salesforce Navigation”



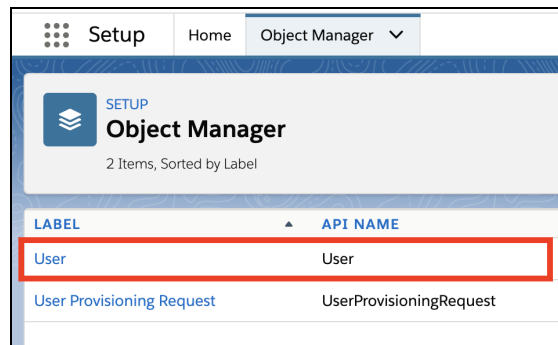
2. Under Salesforce Navigation, you will see Navigation Menu Items
3. Select “Clone This User” from the “Available” side and, between the two boxes under “Add”, click the arrow pointing right to move it to the “Selected” side
4. Click “Save”



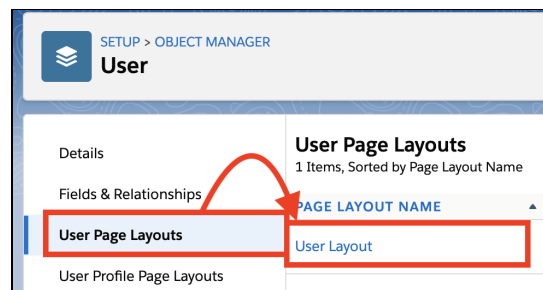
Custom Link on User Page Layout

You can also add a custom link on all User records to easily clone a user from the actual user record. In order to add the custom link to the User Page Layout, follow these steps.

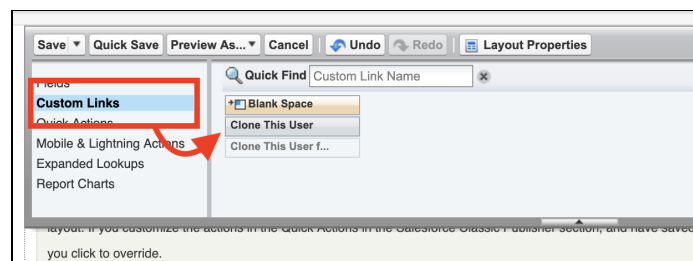
1. In Setup, click “Object Manager”
2. Search for and select the “User” object



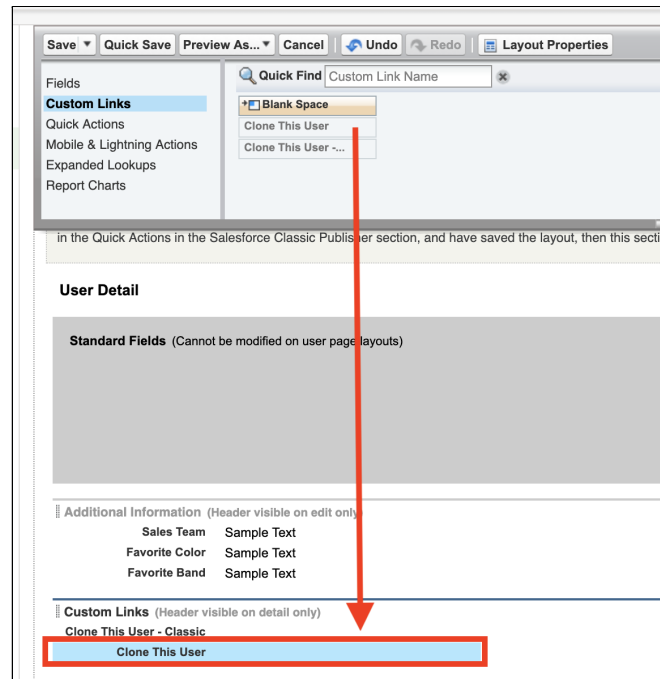
3. Click on “User Page Layout” in the left-hand panel



4. Select the User Page Layout where you would like to add the Custom Link
5. Click “Custom Links”



6. Drag and drop “Clone This User”



Note: There are 2 custom links for Clone This User.

- Clone This User - Classic: This is the custom link that should only be used in Classic
- Clone This User: This is the custom link that should be used in Lightning

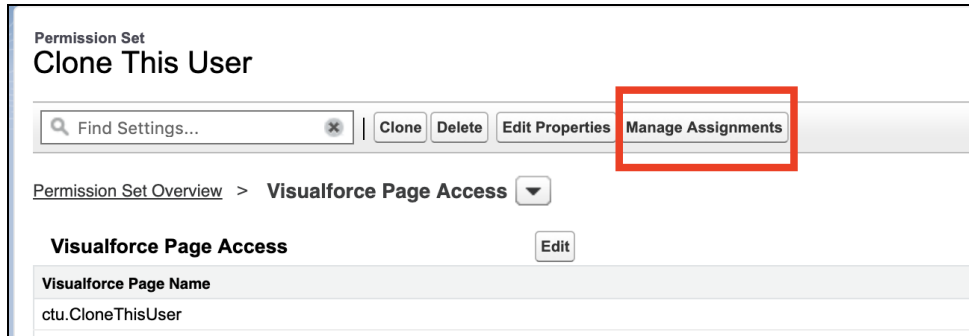
7. Click “Save”

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

Grant Access to Non-Admin Users

Did you install Clone this User for Admins only but have a non-System Administrator user that needs to be able to use it? They must be assigned a Permission Set to gain access to the necessary components.

1. Setup → search for and select “Permission Sets”
2. Find and select the “Clone This User” Label
3. Select the “Manage Assignments” button



Permission Set
Clone This User

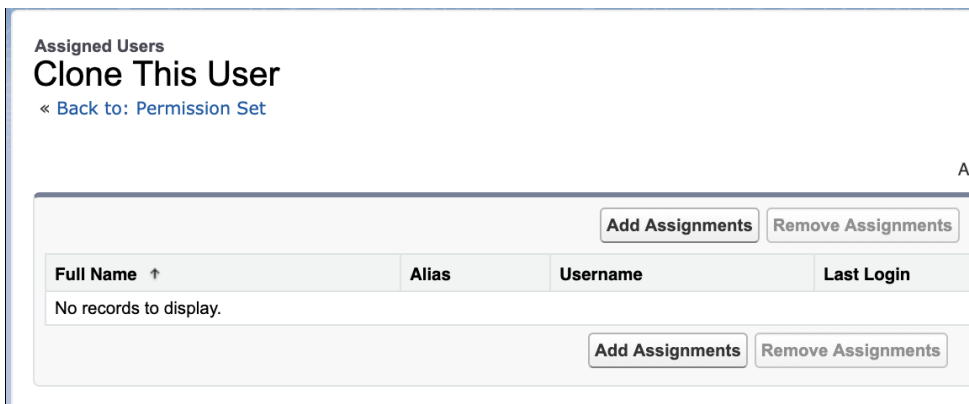
Find Settings... | Clone | Delete | Edit Properties | **Manage Assignments**

Permission Set Overview > Visualforce Page Access

Visualforce Page Access Edit

Visualforce Page Name
ctu.CloneThisUser

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	llepe	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, click the “Assign” button
6. Click “Done”

Bypassing Validation Rules

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>