



Clone This User - User 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 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, an 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 browser with very few clicks and only one screen,



vastly improving the experience of generating nearly identical user records. The purpose of this release is to provide users with even more flexibility in how to clone Users while in Lightning.

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.

Accessing Clone This User

There are five ways you can access Clone This User:

1. **Desktop: User Record**
 - Available in Classic and Lightning
 - Accessible through Setup and on the User record (see “Custom Links”)
 - Steps needed for use
2. **Desktop: AppLauncher**
 - Available in Classic and Lightning
 - Classic: Please use “Clone This User - Classic”
 - Lightning: Please use “Clone This User”
 - Accessible through the AppLauncher by clicking the “Clone This User” object
 - No steps needed for use if the User is a System Administrator
 - Please see the Installation Guide if User is not a System Administrator
3. **Desktop: Lightning Component**
 - Available in Lightning and can be used on any page
 - Steps needed before use
4. **Desktop: Utility Item**
 - Available in Lightning
 - **NOTE:** The CTU utility item is great when used with the pop-out feature, i.e. put Clone This User right next to that spreadsheet you’re referencing.
 - Steps needed before use
5. **Mobile device**
 - Steps needed before use

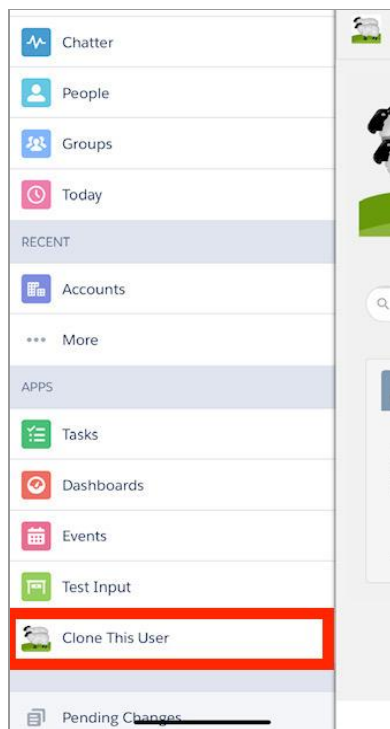
Please work with your System Administrator and the Clone This User Installation Guide to configure the best placement of CTU for your organization.

Using Clone This User

Clone This User will clone Active as well as Inactive Users. Once a new User is cloned, it is active and ready for use. Your administrator will be able to install the custom link for the user record, the custom mobile app, Lightning page component, and utility bar item (see the Installation Guide for Lightning for more details). Once the installation and configuration are complete for your organization, these instructions will walk the user through the different ways to clone users using Clone This User.

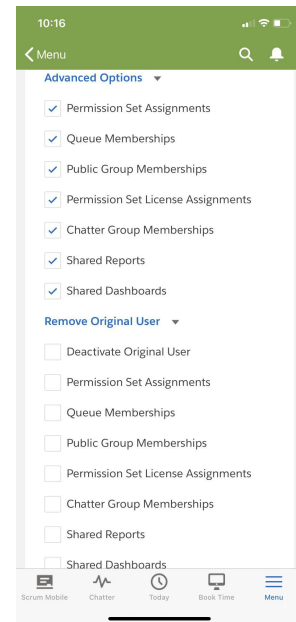
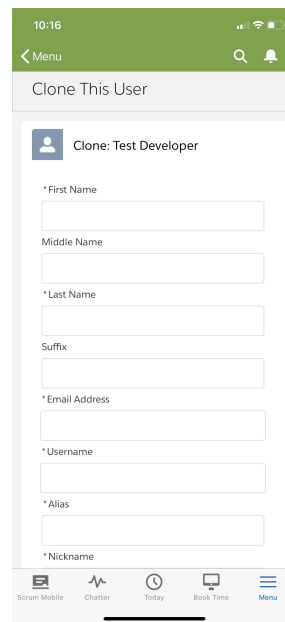
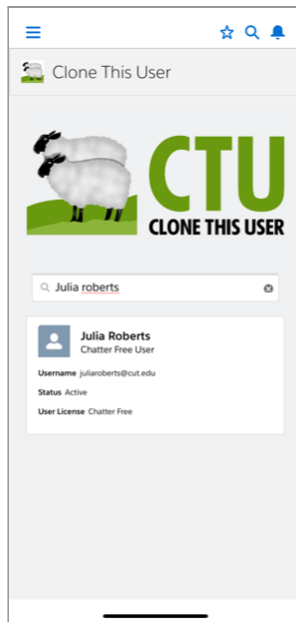
Creating a User from the Mobile Device

1. Select “Clone This User” from your mobile device navigation menu.
2. Search for the name of the existing User you would like to clone.



3. Select the User.

- **NOTE:** You will only be able to clone within the same Salesforce.com license type. See below section for more information on known limitations.



4. Input the details of the new User and choose your settings.

1. Enter First Name, Last Name, and Email.
 - This will auto-fill Username, Alias, and Nickname based on expected Salesforce behavior. If your organization has different policies for these fields, you may edit the default Username, Alias, and Nickname.
 - If the User you are cloning has any custom fields, those appear here and you can either clone them exactly or edit as needed and where possible.
2. Select or deselect “Generate new password and notify user immediately”.
 - **NOTE:** If selected this notifies User immediately and sends 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.
3. Review applicable “Advanced Options” that let you add your new User to the same:
 - Permission Set Assignments
 - Queue Memberships
 - Public Group Memberships
 - Permission Set License Assignments
 - Chatter Group Memberships
 - Shared Reports
 - Shared Dashboards
4. Review Remove Original User Options that let you remove permissions from the user you are cloning.
 - Deactivate User

- Permission Set Assignments
- Queue Memberships
- Public Group Memberships
- Permission Set License Assignments
- Chatter Group Memberships
- Shared Reports
- Shared Dashboards

5. Click “Save” and the following will happen:

1. Clone This User creates the new User with all Permission Sets, Public Groups, features, etc., of the original User, unless you have specified otherwise in Advanced Options.
 - **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 will need to either deactivate existing users or contact your Salesforce.com Account Executive for more users.
2. Unless optionally changed, the new User receives 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.
3. You will be immediately redirected to a confirmation page stating “Your user was successfully cloned.”

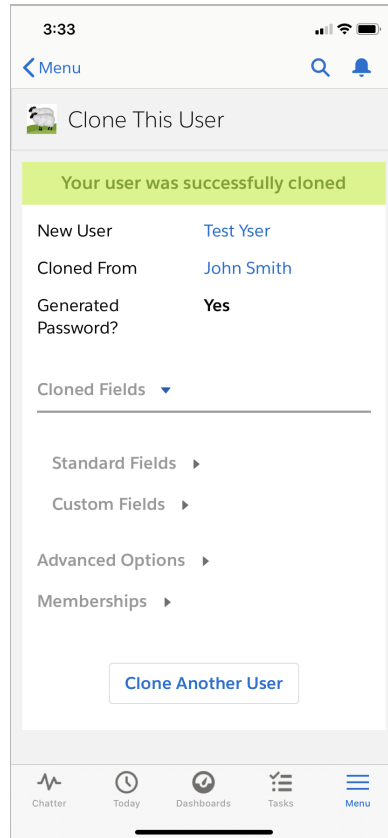
6. Click “Save and Clone Again” and the following will happen:

1. Clone This User creates the new User with all Permission Sets, Public Groups, features, etc., of the original User, unless you have specified otherwise in Advanced Options.
 - **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 will need to either deactivate existing users or contact your Salesforce.com Account Executive for more users.
2. Unless optionally changed, the new User receives 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.
3. You will see a success message that the user was cloned and remain on the cloning screen to begin inputting a new users information

7. Success! Your User has been created. On the new screen you’re taken to you can:

1. Click a link at the bottom of the confirmation page to View Manage Packages in case you need to assign the new User to a managed package that requires a license.
2. Review all the information about the newly created User, and the original User, such as fields and other assignments that were cloned, including:
 - New User: Hyperlink to review
 - Cloned From: Hyperlink to review
 - Generated Password?: Yes or No depending on your previous selection
 - Cloned Fields: Expand to see which standard and custom fields were cloned.
 - Advanced Options: Expand to see advanced options selected previously

3. Click the navigation menu to return to Salesforce.
4. Click the button at the bottom to create another User



Creating a User Browser Options

In Lightning there are 4 options for how to use Clone This User. Clone from these locations:

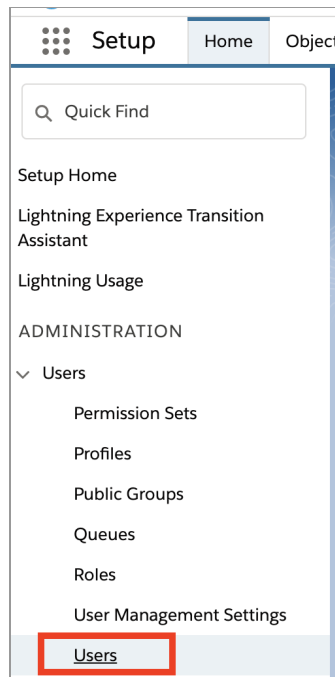
1. On the User Record (through Setup)
 - Automatically added when the package is installed
2. From the Clone This User object/tab
 - Automatically added when the package is installed
3. Clone This User Lightning Page Component
 - Can be manually added to any Page as a component
4. Clone This User Utility Item
 - Can be manually added to the utility bar in an App

See the Installation Guide for more details on how to set up all four options. Below we will share the steps on how to clone users in each location.

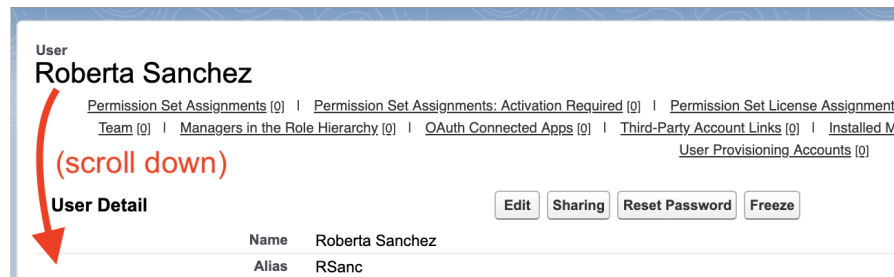
Creating a User from the User Record

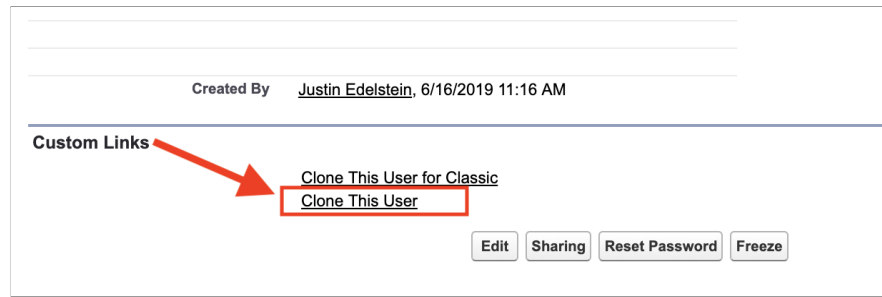
Note: On installation, be sure to add the custom link to the User page layout. For more details about the installation, please see our Installation Guide for Lightning.

1. From the Setup Menu → Administration → Users → Users
 - Or search for Users
2. Click “Users”



3. Select the User you need to clone
4. Scroll down to “Custom Links”



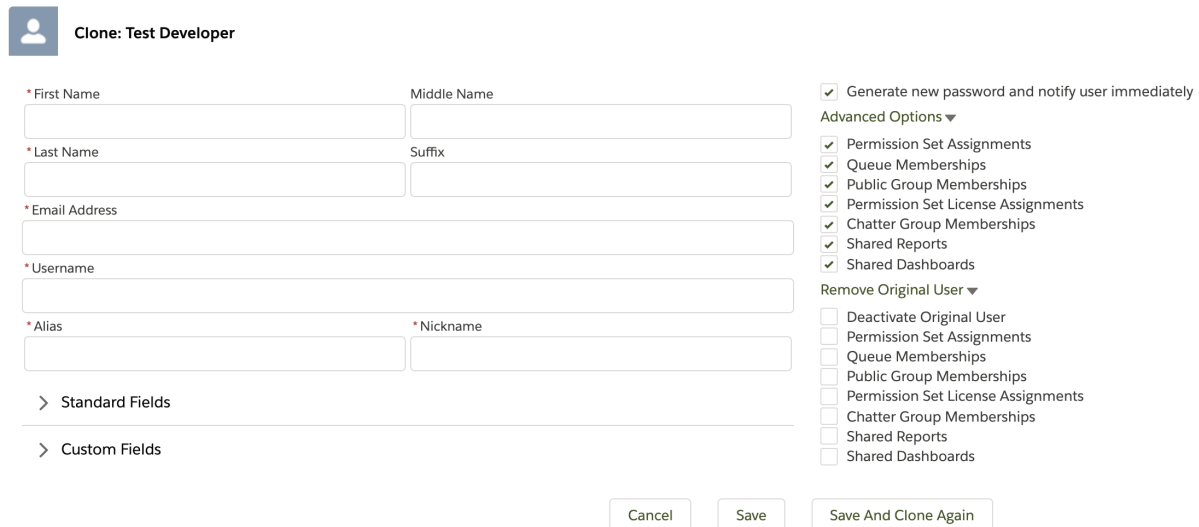


5. Click “Clone This User”

- “Clone This User” is the Lightning version of this app.
- “Clone This User for Classic” is for any instance that is still using Classic.
 - Either will work in Lightning, but we suggest using “Clone This User” when in Lightning for a better user experience.
- **NOTE:** You will only be able to clone within the same Salesforce.com license type. See the next section for more information on known limitations.

6. Enter the new User’s unique information:

- First Name, Last Name, 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. If the User you are cloning has any custom fields, those will appear here and you can either clone them exactly or edit them as needed and where possible.

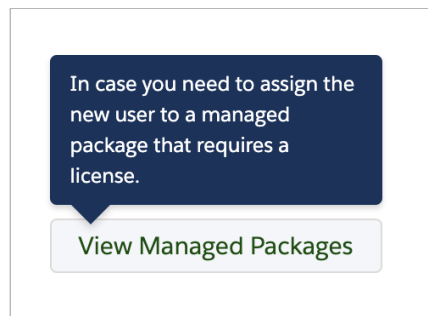


7. Options viewable on the right-hand side:
 - You may deselect option to generate a new password and notify the new User
 - You may also review Advanced Options and deselect any values. Please note that unselected values will not be cloned. Review Remove Original User permission controls permissions related to the cloned user.
8. Click “Save” and the following will happen:
 - Clone This User creates a new User with all Permission Sets, Public Groups, features, etc. of the original User (unless you specified otherwise through Advanced Options).
 - **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.
 - Unless optionally changed, the new User receives 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.
 - You will be immediately redirected to a confirmation page that states “Your user was successfully cloned” and includes info about the newly created User, original User, and lists things cloned (fields and assignments).
9. Click “Save and Clone Again” and the following will happen:
 - Clone This User creates the new User with all Permission Sets, Public Groups, features, etc., of the original User, unless you have specified otherwise in Advanced Options.
 - **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 will need to either deactivate existing users or contact your Salesforce.com Account Executive for more users.
 - Unless optionally changed, the new User receives 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.
 - You will see a success message that the user was cloned and remain on the cloning screen to begin inputting a new users information
10. Success! On the confirmation page you will find the following:
 - A link at the bottom of the confirmation page directs you to View Manage Packages in case you need to assign the new User to a managed package that requires a license. Click the button at the bottom to create another User.

Your user was successfully cloned

New User	New Person
Cloned From	John Smith
Generated Password?	Yes
Cloned Fields ▶	
Advanced Options ▶	
Memberships ▶	

[Clone Another User](#)[View Managed Packages](#)

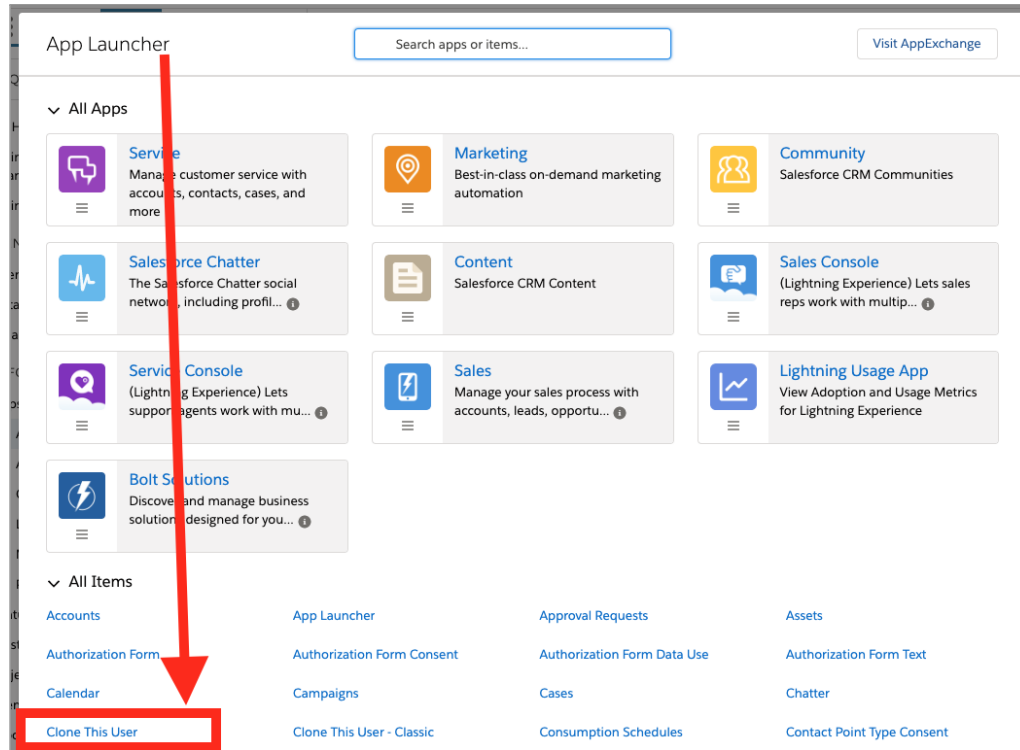


- Fields that you can review:
 - New User - Hyperlink to review
 - Cloned From - Hyperlink to review
 - Generated Password? - Yes or No depending on your previous selection
 - Cloned Fields - Expand to see which standard and custom fields were cloned to the new User
 - Advanced Options - Expand to see advanced options you selected previously
- A button that will allow you to “Clone Another User”
 - Click this button to Clone another User
 - Or click the navigation menu to return to Salesforce
- A link to “View Managed Packages”
 - In case you need to assign new user to managed package that requires a license.

Creating a User from the Lightning Object or Tab

When Clone This User is installed, an object and a tab are automatically created. To locate the object/tab and create a new User follow these steps.

1. Click the “App Launcher”
2. Locate “Clone This User”
3. Click on “Clone This User”



- **NOTE:** “Clone This User - Classic” is best utilized in a Classic environment. If you are utilizing Lightning, we recommend using “Clone This User.”
4. Enter the name of the User you need to clone
 5. Click on the existing User



6. Enter the new User's unique information:

- First Name, Last Name, 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. If the User you are cloning has any custom fields, those will appear here and you can either clone them exactly or edit them as needed and where possible.


Clone: Test Developer

* First Name

Middle Name

* Last Name

Suffix

* Email Address

* Username

* Alias

* Nickname

> Standard Fields

> Custom Fields

☒ Generate new password and notify user immediately

Advanced Options ▼

☒ Permission Set Assignments
 ☒ Queue Memberships
 ☒ Public Group Memberships
 ☒ Permission Set License Assignments
 ☒ Chatter Group Memberships
 ☒ Shared Reports
 ☒ Shared Dashboards

Remove Original User ▼

☐ Deactivate Original User
 ☐ Permission Set Assignments
 ☐ Queue Memberships
 ☐ Public Group Memberships
 ☐ Permission Set License Assignments
 ☐ Chatter Group Memberships
 ☐ Shared Reports
 ☐ Shared Dashboards

Cancel

Save

Save And Clone Again

7. Options (right-hand side):

- You may deselect option to generate a new password and notify the new User
- You may also review Advanced Options and deselect any values. Please note that unselected values will not be cloned. Review Remove Original User permission controls permissions related to the cloned user.

8. Click “Save” and the following will happen:

- Clone This User will create a new User with all Permission Sets, Public Groups, features, etc of the original User (unless you have specified otherwise through the Advanced Options feature).
 - **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.
- Unless optionally changed, the new User receives 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.
- 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).
 - 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.
 - A link at the bottom to create another User.

9. Click “Save and Clone Again” and the following will happen:

- Clone This User creates the new User with all Permission Sets, Public Groups, features, etc., of the original User, unless you have specified otherwise in Advanced Options.
 - **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 will need to either deactivate existing users or contact your Salesforce.com Account Executive for more users.
- Unless optionally changed, the new User receives 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.
- You will see a success message that the user was cloned and remain on the cloning screen to begin inputting a new users information

Your user was successfully cloned

New User	New Person
Cloned From	John Smith
Generated Password?	Yes
Cloned Fields ▶	
Advanced Options ▶	
Memberships ▶	

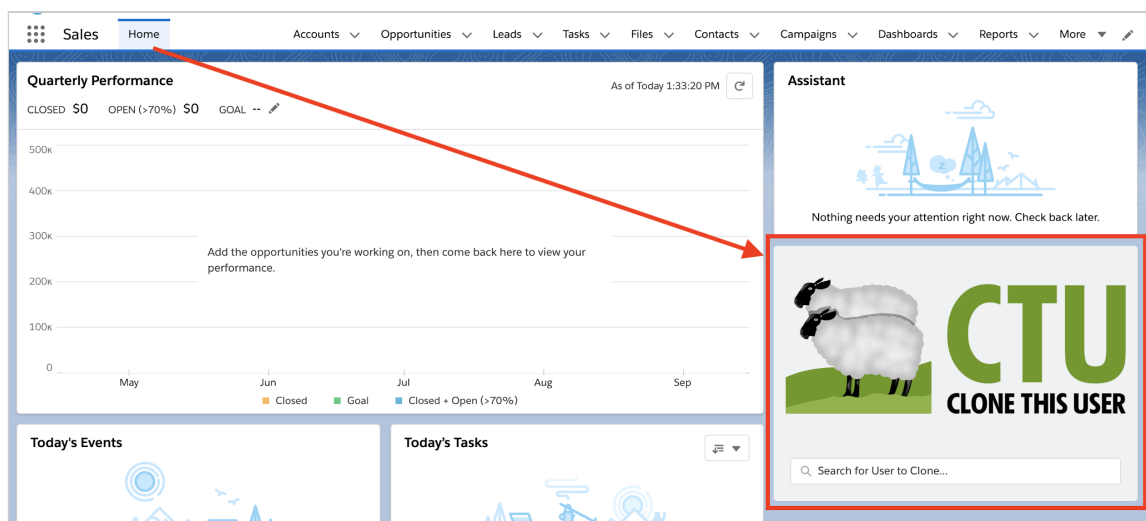
[Clone Another User](#)[View Managed Packages](#)

Creating a User from the Lightning Page Component

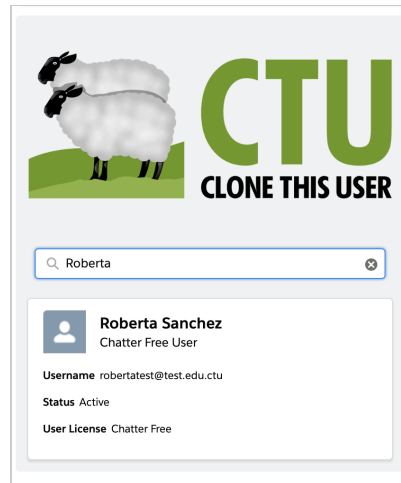
You can add Clone This User to any Lightning Page by dragging and dropping the component to the page. For more details on installation, please check out our [Installation Guide for Lightning](#).

To create a User from the Lightning Component:

1. Locate the component on the page



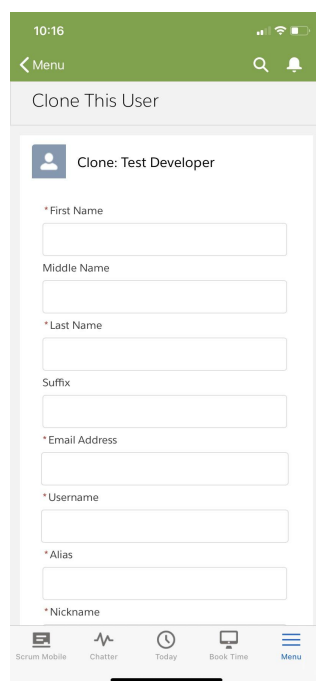
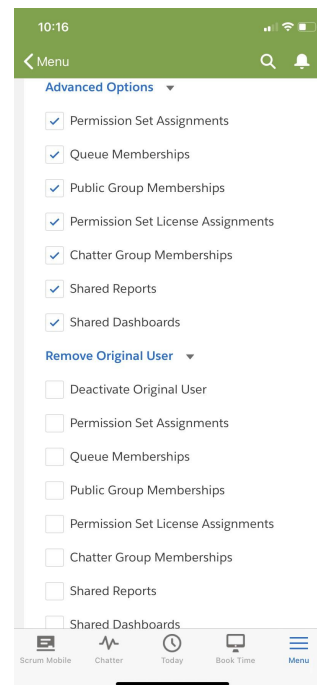
2. Enter the name of the existing User you need to clone



3. Select the existing User

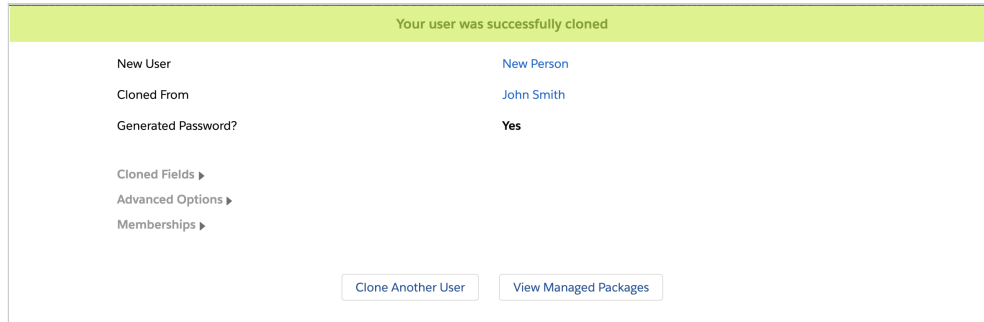
4. Enter the new User's unique information:

- First Name, Last Name, 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. If the User you are cloning has any custom fields, those will appear here and you can either clone them exactly or edit them as needed and where possible.

5. Options viewable underneath:
 - You may deselect option to generate a new password and notify the new User
 - You may also review Advanced Options and deselect any values. Please note that unselected values will not be cloned. Review Remove Original User permission controls permissions related to the cloned user.
6. Click “Save” and the following will happen:
 - Clone This User will create a new User with all Permission Sets, Public Groups, features, etc of the original User (unless you have specified otherwise through the Advanced Options feature).
 - **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.
 - Unless optionally changed, the new User receives 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.
 - 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).
7. Click “Save and Clone Again” and the following will happen:
 - Clone This User creates the new User with all Permission Sets, Public Groups, features, etc., of the original User, unless you have specified otherwise in Advanced Options.
 - **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 will need to either deactivate existing users or contact your Salesforce.com Account Executive for more users.
 - Unless optionally changed, the new User receives 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.
 - You will see a success message that the user was cloned and remain on the cloning screen to begin inputting a new users information
8. Success! On the new confirmation page you will find the following:

- 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.
- A button at the bottom to create another User.



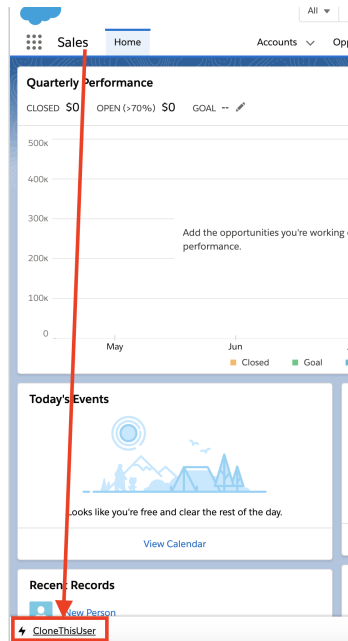
- Fields for you to review:
 - New User - Hyperlink to review
 - Cloned From - Hyperlink to review
 - Generated Password? - Yes or No depending on your previous selection
 - Cloned Fields - Expand to see which standard and custom fields were cloned to the new User
 - Advanced Options - Expand to see any of the advanced options you selected previously
- “Clone Another User”
 - Click this button to Clone another User
 - Or click the navigation menu to return to Salesforce
- “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 Utility Bar

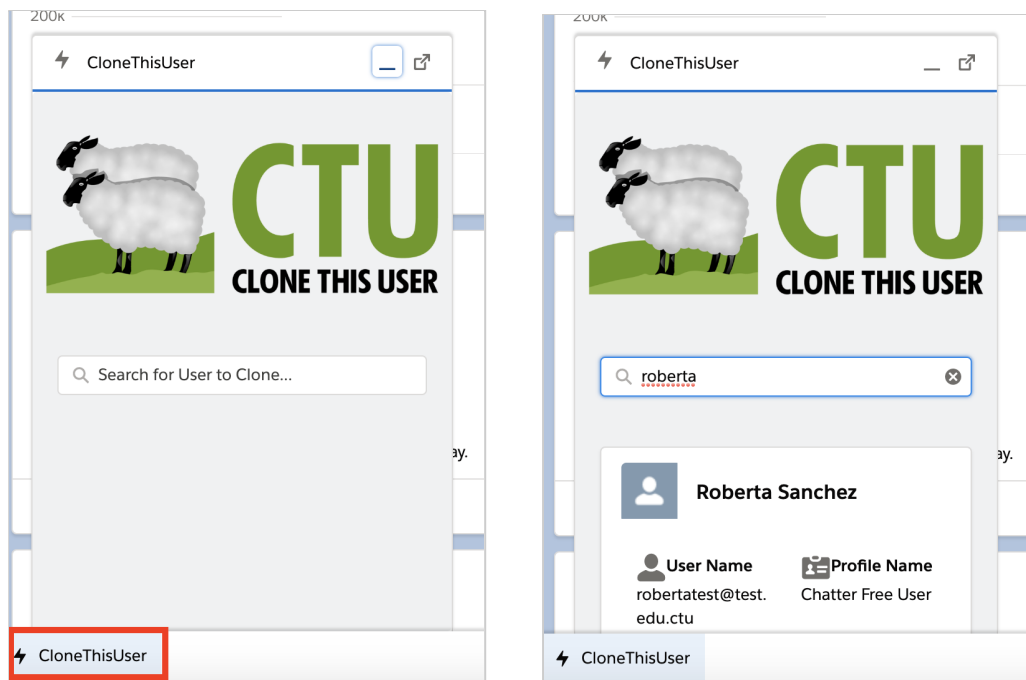
When Clone This User is installed, you can add it as a Utility Item for any app. For details on how to add Clone This User as a utility item, please see our Installation Guide for Lightning.

To add Users through the utility item, follow these steps:

1. Locate utility items (bottom of the page)

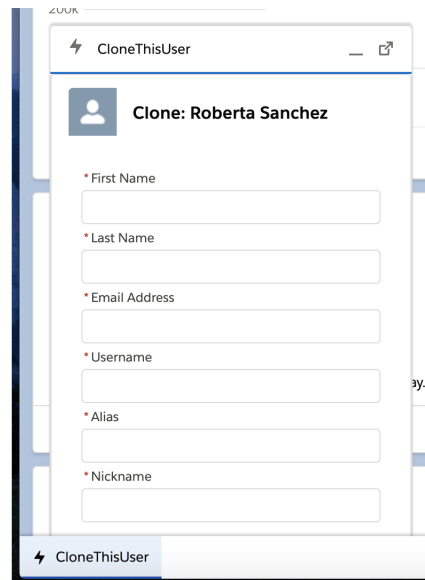


2. Locate "Clone This User"
3. Click to open Clone This User
4. Enter the name of the existing User you need to clone and select them



5. Enter the new User's unique information:
 - First Name, Last Name, 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. If the User you are cloning has any custom fields, those will appear here and you can either clone them exactly or edit them as needed and where possible.



CloneThisUser

Clone: Roberta Sanchez

* First Name

* Last Name

* Email Address

* Username

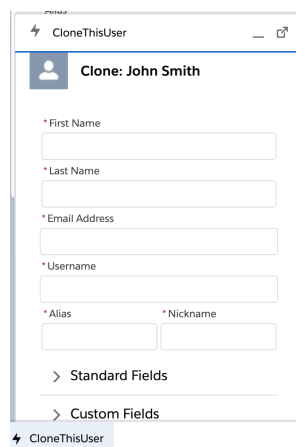
* Alias

* Nickname

CloneThisUser

6. Options (underneath):

- You may deselect option to generate a new password and notify the new User
- You may also review Advanced Options and deselect any values. Please note that unselected values will not be cloned. Review Remove Original User permission controls permissions related to the cloned user.



CloneThisUser

Clone: John Smith

* First Name

* Last Name

* Email Address

* Username

* Alias

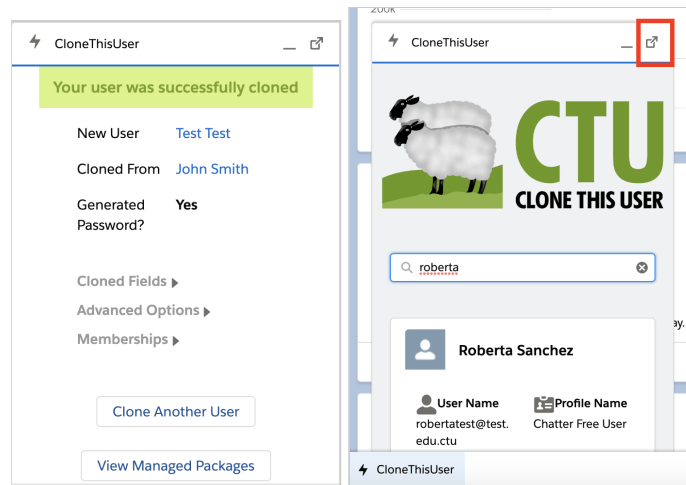
* Nickname

> Standard Fields

> Custom Fields

CloneThisUser

7. Click “Save” and the following will happen:
 - Clone This User will create a new User with all Permission Sets, Public Groups, features, etc of the original User (unless you have specified otherwise through the Advanced Options feature).
 - **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.
 - Unless optionally changed, the new User receives 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.
 - You’ll 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.
 - Click the link at the bottom to create another User.
 - Click “Save and Clone Again” and the following will happen:
 - Clone This User creates the new User with all Permission Sets, Public Groups, features, etc., of the original User, unless you have specified otherwise in Advanced Options.
 - **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 will need to either deactivate existing users or contact your Salesforce.com Account Executive for more users.
 - Unless optionally changed, the new User receives 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.
 - You will see a success message that the user was cloned and remain on the cloning screen to begin inputting a new users information



Special Note about Clone This User in the Utility Bar: Try the pop-out and place Clone This User next to your document or spreadsheet or email (or any place where you are referencing the new User's info).

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 you 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.

[return to CTU](#)

Manage Permission Check for non-System Administrators

If you uncheck this setting, CTU will not check the Manage Users permission for non-System Administrators	Related Documentation	☒
If you uncheck this setting, CTU will not check the Modify All Data permission for non-System Administrators	Related Documentation	☒
If you uncheck this setting, CTU will not check the Assign Permission Set permission for non-System Administrators	Related Documentation	☒
If you uncheck this setting, CTU will not check the Reset Password permission for non-System Administrators	Related Documentation	☒
If you uncheck this setting, CTU will not check Customize Application, Manage Public List Views and Manage Users permissions for non-System Administrators	Related Documentation	☒

Save

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

Advanced Options ▼

☒ Permission Set Assignments

☒ Queue Membership

☐ Public Group Membership 

☒ Permission Set License Assignments

☒ Chatter Group Membership

☒ Shared Reports

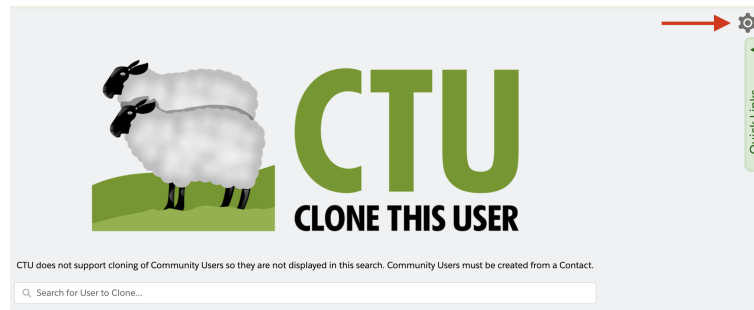
☒ Shared Dashboards

Remove Original User ▼

Configure Standard and Custom Fields to Display

Clone This User allows a System Administrator to configure in the Settings page which standard and custom fields you can display when cloning users:

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 standard and custom fields available in your organization.

Standard Fields

Select which standard fields from the User object you want to hide from CTU when cloning. Fields are sorted alphabetically in case sensitive order (all uppercase first then all lowercase)

Reset

Save

Standard Fields Ignored: 25

Field Label	API Name	Data Type	Required	Installed Package
☒ Active	IsActive	BOOLEAN	Yes	
☒ City	City	STRING	No	
☒ Company Name	CompanyName	STRING	No	
☒ Country	Country	STRING	No	
☒ Delegated Approver ID	DelegatedApproverId	REFERENCE	No	
☒ Department	Department	STRING	No	
☒ Division	Division	STRING	No	
☒ Email Encoding	EmailEncodingKey	PICKLIST	Yes	
☒ Employee Number	EmployeeNumber	STRING	No	
☒ Extension	Extension	PHONE	No	
☒ Fax	Fax	PHONE	No	
☒ Language	LanguageLocaleKey	PICKLIST	Yes	
☒ Locale	LocaleSidKey	PICKLIST	Yes	
☒ Manager ID	ManagerId	REFERENCE	No	
☒ Middle Name	MiddleName	STRING	No	
☒ Mobile	MobilePhone	PHONE	No	
☒ Phone	Phone	PHONE	No	
☒ Profile ID	ProfileId	REFERENCE	Yes	
☒ Role ID	UserRoleId	REFERENCE	No	
☒ State/Province	State	STRING	No	
☒ Street	Street	TEXTAREA	No	
☒ Suffix	Suffix	STRING	No	
☒ Time Zone	TimeZoneSidKey	PICKLIST	Yes	
☒ Title	Title	STRING	No	
☒ Zip/Postal Code	PostalCode	STRING	No	

Custom Fields

Select which custom fields from the User object you want to hide from CTU when cloning. Fields are sorted alphabetically in case sensitive order (all uppercase first then all lowercase)

Reset

Save

Custom Fields Ignored: 36

Field Label	API Name	Data Type	Required	Installed Package
☒ ABC Buddy	ABC_Buddy__c	REFERENCE	No	ABC_Buddy
☒ AreaLongCustomField	AreaLongCustomField__c	TEXTAREA	No	AreaLongCustomField
☒ AreaRichCustomField	AreaRichCustomField__c	TEXTAREA	No	AreaRichCustomField
☒ Can View Not Assigned Prospects	pi__Can_View_Not_Assigned_Prospect...	BOOLEAN	Yes	pi
☒ CheckBoxCustomField	CheckBoxCustomField__c	BOOLEAN	Yes	CheckBoxCustomField
☒ CurrencyCustomField	CurrencyCustomField__c	CURRENCY	No	CurrencyCustomField
☒ DateCustomField	DateCustomField__c	DATE	No	DateCustomField
☒ DateTimeCustomField	DateTimeCustomField__c	DATETIME	No	DateTimeCustomField
☒ Display In Resource Allocator	Display_In_Resource_Allocator__c	BOOLEAN	Yes	Display_In_Resource_Allocator
☒ DocuSign Username	dfs__DSProSFUsername__c	STRING	No	dfs
☒ EmailCustomField	EmailCustomField__c	EMAIL	No	EmailCustomField
☒ EncryptedAreaCustomField	EncryptedAreaCustomField__c	ENCRYPTEDSTRING	No	EncryptedAreaCustomField
☒ Feature Pilots	Feature_Pilots__c	MULTIPICKLIST	No	Feature_Pilots
☒ GeolocationCustomField	GeolocationCustomField__c	LOCATION	No	GeolocationCustomField
☒ GeolocationCustomField (Latitude)	GeolocationCustomField__Latitude__s	DOUBLE	No	GeolocationCustomField
☒ GeolocationCustomField (Longitude)	GeolocationCustomField__Longitude__s	DOUBLE	No	GeolocationCustomField
☒ HierarchicalCustomField	HierarchicalCustomField__c	REFERENCE	No	HierarchicalCustomField
☒ MultipicklistCustomField	Multipicklist__c	MULTIPICKLIST	No	Multipicklist
☒ NumberCustomField	NumberCustomField__c	DOUBLE	No	NumberCustomField
☒ Pardot Api Key	pi__Pardot_Api_Key__c	ENCRYPTEDSTRING	No	pi
☒ Pardot Api Version	pi__Pardot_Api_Version__c	STRING	No	pi
☒ Pardot User Id	pi__Pardot_User_Id__c	ENCRYPTEDSTRING	No	pi
☒ Pardot User Key	pi__Pardot_User_Key__c	ENCRYPTEDSTRING	No	pi
☒ Pardot User Role	pi__Pardot_User_Role__c	STRING	No	pi
☒ Password	Password__c	STRING	No	Password
☒ PercentCustomField	PercentCustomField__c	PERCENT	No	PercentCustomField
☒ PhoneCustomField	PhoneCustomField__c	PHONE	No	PhoneCustomField
☒ PicklistCustomField	PicklistCustomField__c	PICKLIST	No	PicklistCustomField
☒ Remove From Goal Tracker	Remove_From_Goal_Tracker__c	BOOLEAN	Yes	Remove_From_Goal_Tracker
☒ Status Reports LEX	Status_Reports_LEX__c	BOOLEAN	Yes	Status_Reports_LEX
☒ TextAreaCustomField	TextAreaCustomField__c	TEXTAREA	No	TextAreaCustomField
☒ TextCustomTestField	TextCustomTestField__c	STRING	No	TextCustomTestField
☒ TimeCustomField	TimeCustomField__c	TIME	No	TimeCustomField
☒ Twitter @	Twitter__c	STRING	No	Twitter
☒ UriCustomField	UriCustomField__c	URL	No	UriCustomField
☒ field_Test__c	field_Test__c	STRING	No	field_Test

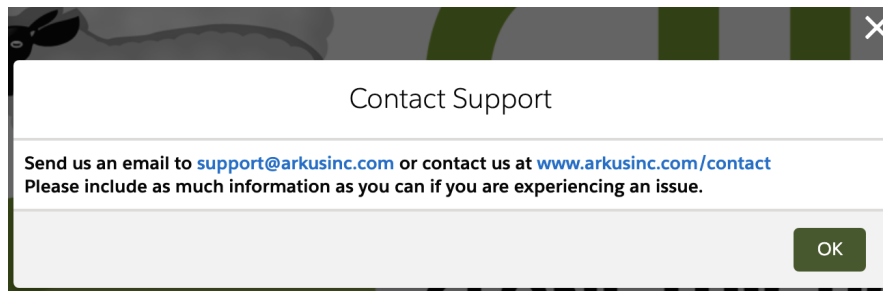
- If there's a field that may contain sensitive information that should not be cloned from the original user, then you should uncheck that field.
- Click Save.
- Next time you try to clone a user that field will not be displayed.

Quick Links Bar

The Quick Links bar allows you to navigate to CTU-related features in the Salesforce Setup.



- Access to CTU-related items in Setup: Users, Profiles, Roles, Public Groups, Queues, and Permission Sets. If you are not sure which user to clone from, which user has a certain profile or role, you can easily navigate to these items in the setup from CTU.
- Contact Support: provides easy access to Arkus Support for any information or issues you need help with.

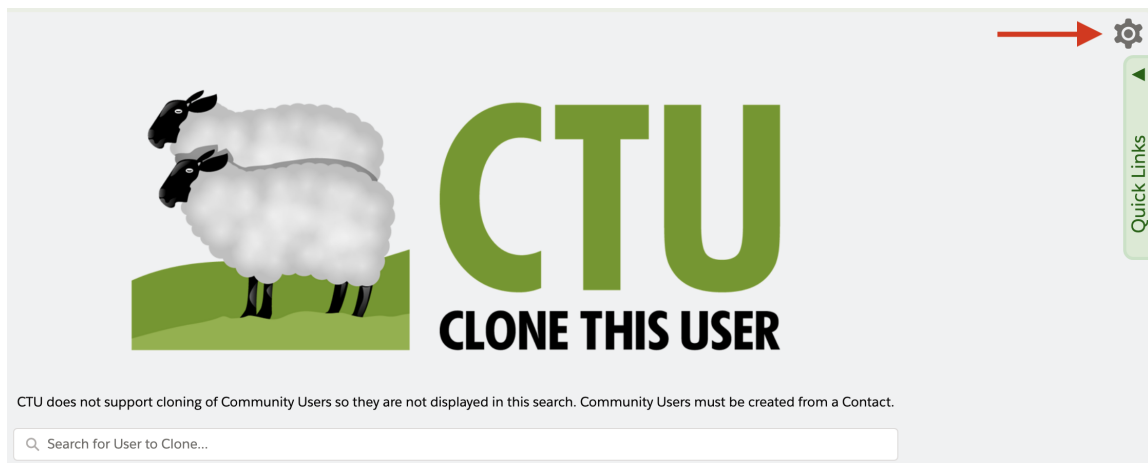


- CTU on YouTube: provides a direct link to the CTU YouTube playlist so you can check demos if there's a new version published.
- CTU in Appexchange: provides a direct link to the CTU Appexchange listing so you can check if there's a new version published.
 - With the new branding in the bottom-right corner of the main page you can compare the version you have installed with the one available in Appexchange:

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Clone This User allows a System Administrator to configure in the Settings page if the Quick Links bar should also be displayed to non-Admin users:

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



- The Settings page will be displayed with the option to show the Quick Link bar to non-Admin users:

Quick Links bar visibility to non-System Administrators

If you check this setting, Quick Links bar will be visible for non-System Administrators

☒

Save

- Click Save.

Set Default Values for the General Options

The Settings page allows a System Administrator to enter default values for the General Options. In order to achieve this, look for the corresponding field in the General Options fields table of the Settings page and select the action button located at the last column of the row.

General	Generate new password and notify user immediately	No	
---------	---	----	---

- Click the “Change default value” option.

General	Generate new password and notify user immediately	No	
Advanced Options	Chatter Group Memberships	Yes	Change default value

- A new window will appear requesting the user to enter the new value.

Set the field default value

☐ Generate new password and notify user immediately

Save

- Modify the value and click the Save button:

Set the field default value

☒ Generate new password and notify user immediately

- The new value will be displayed in the default value column of the corresponding field.

General	Generate new password and notify user immediately	Yes	
---------	---	-----	--

- After saving the value in the input window, click the Save button at the top of the table:

General Options

Set default values for the different general options.

From now on, the CTU form will show the default value for the corresponding field. In the example described above, the “Generate new password and notify user immediately Advanced Options” will be set by default with the True value:

☒ Generate new password and notify user immediately

Set Default Values for Standard and Custom Fields

The Settings page allows a System Administrator to enter default values for both standard and custom fields. In order to achieve this, look for the corresponding field in the standard/custom fields table of the Settings page and select the action button located at the last column of the row.

☐ Zip/Postal Code	PostalCode	STRING	No	
--	------------	--------	----	--

- Click the “Change default value” option.

☐ WDC User	UserPermissionsWorkDotComU...	BOOLEAN	Yes	
☐ Zip/Postal Code	PostalCode	STRING	No	Change default value

- A new window will appear requesting the user to enter the new value.

Set the field default value

Zip/Postal Code

If the value wasn't set before, the input box will appear empty as shown in the image above.

3. Enter the corresponding value and click the Save button:

Set the field default value

Zip/Postal Code

Depending on the data type of the selected field, the window will show different kinds of input:

- If the field is of type Picklist the form to enter a default value will display:

Set the field default value

* Email Encoding

Japanese (EUC) ▼

--None--

Unicode (UTF-8)

General US & Western Europe (ISO-8859-1, ISO-LATIN-1)

Japanese (Shift-JIS)

Japanese (JIS)

✓ Japanese (EUC)

Korean (ks_c_5601-1987)

Traditional Chinese (Big5)

- If the field is of type Multi-select Picklist the form to enter a default value will display:

Set the field default value

Active Email Alert Subscription

Available

- Open Approvals - EMEA
- Sales Crediting Alert

Chosen

- Opportunity Returned Manager Alert
- Opportunity OM Accept Notification

Save

- If the field is of type Boolean the form to enter a default value will display:

Set the field default value

Data.com User

☐

Take value from original user

Save

If the “Take value from original user button” is clicked, the form will display the value from the user being cloned, if the Save button is selected, the value will be true if the checkbox is checked or false if the checkbox is unchecked.

- If the field is of type Reference (lookup) the form to enter a default value will display:

Set the field default value

Manager

John

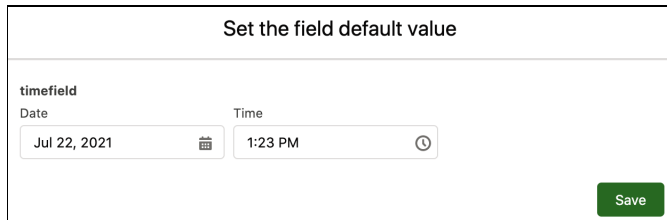
Show All Results for "John"

- John Doe
- Testing John
- John Bonjovi
- Join John
- John John

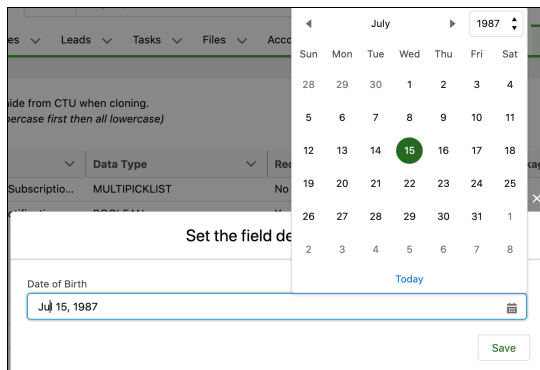
NOTE: When setting a default Profile value, profiles for community users will not be shown since community users cannot be cloned using Clone This User (see [Known Limitations](#)). This includes but may not be restricted to profiles with licenses:

- External Apps
- High Volume Customer Portal
- Service Cloud Portal
- Authenticated Sites Portal
- Customer Community
- Customer Community Plus
- Customer Community Login
- Customer Community Plus Login
- Partner Community Login
- Customer Portal - Enterprise Administration
- Customer Portal Manager Standard
- External Apps Login Channel Account Login
- Gold Partner
- Silver Partner
- Customer Portal Manager Custom
- Partner Community
- Channel Account

- If the field is of type Datetime the form to enter a default value will display:



- If the field is of type Date the form to enter a default value will display:



- If the field is of type String (Textfields) the form to enter a default value will display:

Set the field default value

Middle Name

Save

- If the field is of type Textarea the form to enter a default value will display:

Set the field default value

Rich text area test

Salesforce Sans 12 B I U

This is only a test

Save

- If the field is of type Geolocation the form to enter a default value will display:

Set the field default value

geo
Latitude

Longitude

Save

- If the field is of type Email the form to enter a default value will display:

Set the field default value

Company Email

Save

The value will be validated when attempting to save:

Set the field default value

Company Email

test.test

You have entered an invalid format.

Save

- If the field is of type Time the form to enter a default value will display:

Set the field default value

Work Start Time

2:45 AM

Save

- If the field is of type Phone the form to enter a default value will display:

Set the field default value

Mobile

+59898876455

Save

- If the field is of type Number the form to enter a default value will display:

Set the field default value

Age

25

Save

The value will be validated when attempting to save:

Set the field default value

Age

e255

Enter a valid value.

Save

- If the field is of type URL the form to enter a default value will display:

Set the field default value

Company Web

somecompany.com

Save

The value will be validated when attempting to save:

Set the field default value

Company Web

testcompany.

Incorrect URL format

Save

- If the field is of type Percent the form to enter a default value will display:

Set the field default value

Job Completed

46

Save

The value will be validated when attempting to save:

Set the field default value

Job Completed

e33

Enter a valid value.

- If the field is of type Currency the form to enter a default value will display:

Set the field default value

Salary

\$4,500.00

The value will be validated when attempting to save:

Set the field default value

Salary

ee34122

Enter a valid value.

- The new value will be displayed in the default value column of the corresponding field.

☐ Zip/Postal Code	PostalCode	STRING	No	25000	▼
--	------------	--------	----	-------	---

- After saving the value in the input window, click the Save button at the top of the table:

Standard Fields

Select which standard fields from the User object you want to hide from CTU when cloning.
Fields are sorted alphabetically in case sensitive order (all uppercase first then all lowercase)

From now on, the CTU form will show the default value for the corresponding fields. In the example described above, the Zip/Postal Code will be set by default with the 25000 value:

Zip/Postal Code
25000

When cloning the user will have the option to change this value or leave the default value.

Note: If the field's default value wasn't set in the Settings page, when a User is cloned, the original User field value will be populated. If the User field value is empty, no value will be shown in the form.

For example, John's mobile phone is +555223523, and no default value was set in the Settings page. In this scenario, John's phone will be shown in the form for the new User to be created. If we set the value +555201213 in the Settings page for the mobile phone and clone John's user, the value shown in the form will be the one set in the Settings page.

Other Details

Clone This User will clone active as well as inactive Users. Once a new User is cloned, it is created, active, and ready for use.

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 only creates one user at a time and clones almost everything except fields Salesforce.com requires as unique, such as 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).

For custom fields, if a custom field is changed it is not listed under "Cloned Fields" on the success page. Cloning custom fields is a Lightning only customization.

See the table on the following page for more information.

CTU clones automatically in the background and cannot be input by the CTU user	CTU allows to input without prepopulation (* required)	CTU allows input with prepopulation. If not shown on screen they are automatically cloned in the background from original user. (* required)	CTU doesn't clone
Fields	Fields	Fields	Fields
Call Center	First Name*	Active	Accessibility Mode
Salesforce1 User	Middle Name	Role	Color-Blind Palette on Charts
Development Mode	Last Name*	Profile*	Federation ID
Allow Forecasting	Suffix	Title	Force.com Quick Access Menu
Newsletter	Email*	Company	Mobile Configuration
Admin Newsletter	Username*	Department	Checkout Enabled
Data.com Monthly Addition Limit	Alias*	Division	Show View State in Development Mode
Receive Salesforce CRM Content Alerts	Nickname*	Manager	Receive Approval Request Emails
Receive Salesforce CRM Content Alerts as Daily Digest	Phone	Salesforce CRM Content User	Make Setup My Default Landing Page
	Extension	Timezone*	Data.com User Type
	Fax	Language*	Salesforce Classic User
	Mobile	Locale*	Hourly Login Limit
	Employee Number	Email Encoding*	Send Apex Warning Emails
	Address	Auto-login To Call Center	Start of Day
		Chatter Answers User	End of Day
		Data.com User	
		Flow User	
		Knowledge User	
		Marketing User	
		Offline User	
		Delegated Approver	
		Service Cloud User	
		Site.com Contribution User	
		Site.com Publisher User	
		Work.com User (WDC User)	

Related Information	Related Information		
Permission Set Assignments	Personal Groups		
Permission Set License Assignments	Outlook Configuration Assignment		
Public Group Memberships			
Queue Memberships			
Chatter Group Memberships			
Shared Reports			
Shared Dashboards			

Depending on user's license:

- **Marketing User:** Indicates whether the user is enabled to manage campaigns in the user interface. Available for Salesforce license.
- **Offline User:** Indicates whether the user is enabled to use Offline Edition. Available for Salesforce and Salesforce Platform license.
- **Auto-login To Call Center:** Indicates whether the user is enabled to use the auto login feature of the call center. Available for Salesforce, Salesforce Platform and Force.com - App Subscription license.
- **Salesforce CRM Content User:** Indicates whether the user is allocated one Salesforce CRM Content User License. Available for Salesforce, Salesforce Platform and Force.com - App Subscription licenses.
- **Knowledge User:** Indicates whether the user is enabled to use Salesforce Knowledge. Available for Salesforce platform Force.com - App Subscription and Knowledge Only User license.
- **Flow User:** Indicates whether the user can run flows or not. Available for Salesforce, Salesforce Platform and Force.com - App Subscription profile.
- **Data.com User:** Indicates whether the user is allocated one Data.com user license. Available for Salesforce, Salesforce Platform and Force.com - App Subscription license.
- **Live Agent User.** Indicates whether the user is enabled to use Chat. Available for Salesforce license.
- **Site.com Contributor User:** Indicates whether the user is allocated one Site.com Contributor feature license. Available for Salesforce, Salesforce Platform and Force.com - App Subscription licenses.
- **Site.com Publisher User:** Indicates whether the user is allocated one Site.com Publisher feature license. Available for Salesforce, Salesforce Platform and Force.com - App Subscription licenses.



- **Chatter Answers User:** Indicates whether the portal user is enabled to use the Chatter Answers license. This feature license is automatically assigned to high-volume portal users who self-register for Chatter Answers.
- **WDC User (Work.com User):** Indicates whether the WDC feature is enabled for the user. Available for Salesforce, Salesforce Platform and Force.com - App Subscription and WDC Only licenses.

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>