

## Role hierarchies | Creating role hierarchies in Salesforce

### Creating role hierarchies in Salesforce

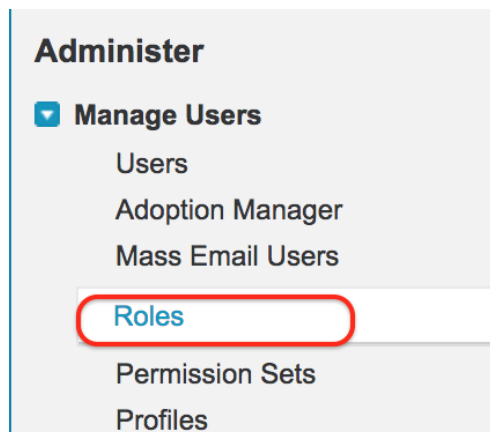
In our previous [Salesforce admin Tutorial](#) we have learned about [Creating and Managing users in Salesforce](#). In this Salesforce tutorial we are going to learn about Role hierarchies and Creating role hierarchies in [Salesforce](#).

#### *Define a Role hierarchies in Salesforce.*

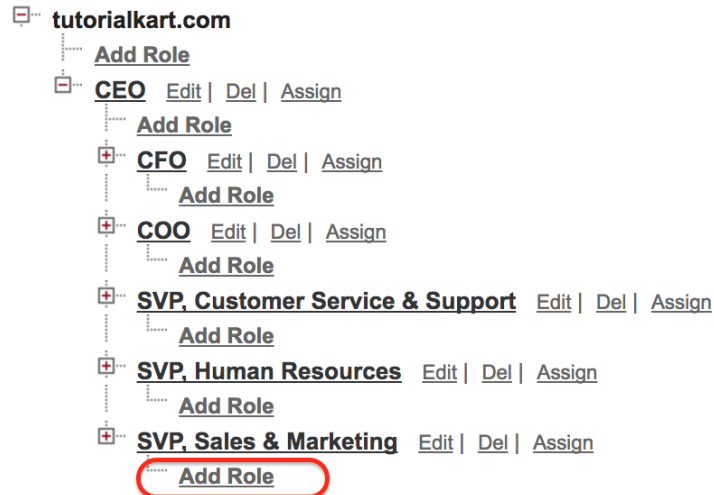
Role hierarchies in Salesforce are [sharing settings](#) at application level. Role hierarchies and [sharing settings](#) in Salesforce determines the level of visibility that users and its subordinates to access object records.

#### *Creating a Role Hierarchy in Salesforce.*

To create a role hierarchy in salesforce go to **Setup | Administer | Manage Users | Roles**.



- Click on Roles.
- Now a sample Role hierarchy tree list will be displayed.
- Click on Set up Roles.

[Collapse All](#) [Expand All](#)

In this Salesforce tutorial, we are adding a role to SVP, Sales & Marketing..

- Click on Add Role.

Role Edit

## New Role

Label	<input type="text" value="Sales Manager"/>
Role Name	<input type="text" value="Sales_Manager"/> <a href="#">i</a>
This role reports to	<input type="text" value="SVP, Sales &amp; Marketing"/> <a href="#">i</a>
Role Name as displayed on reports	<input type="text" value="Manager"/>

- Enter label name.
- Enter Role Name.
- Select the role to which this role has to report.
- Enter Role name to display on **Reports**.
- Click on Save button.

## How to add Users to Roles in Salesforce?

To add a User to Roles in Salesforce go to detail page of the Role as shown below.

## Role Sales Manager

[Help for this Page](#) ?

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

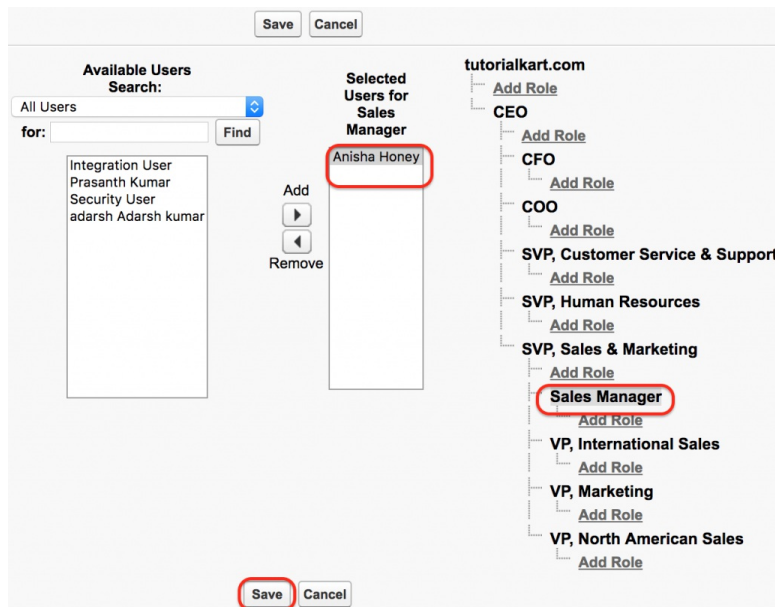
Hierarchy: [tutorialkart.com](#) » [CEO](#) » [SVP, Sales & Marketing](#) » Sales Manager  
Siblings: [VP, North American Sales](#), [VP, Marketing](#), [VP, International Sales](#)

Users in Sales Manager Role [1]

Role Detail				<a href="#">Edit</a>	<a href="#">Delete</a>
Label	Sales Manager	Role Name	Sales_Manager		
This role reports to	<a href="#">SVP, Sales &amp; Marketing</a>	Role Name as displayed on reports	Manager		
Modified By	<a href="#">Prasanth Kumar</a> , 2/26/2017 7:39 PM	Sharing Groups	<a href="#">Role, Role and Subordinates</a>		

 **Users in Sales Manager Role** [Assign Users to Role](#) [New User](#) [Users in Sales Manager Role](#) [Help](#) ?

- Click on Assign users to Role.



The screenshot shows the 'Assign Users to Role' dialog box. On the left, there is a search bar for 'Available Users' with a 'Find' button. Below it, a list of users is shown: Integration User, Prasanth Kumar, Security User, and adarsh Adarsh kumar. In the center, there are 'Add' and 'Remove' buttons. On the right, there is a list of 'Selected Users for Sales Manager' with 'Anisha Honey' selected. To the right of the dialog is a role hierarchy tree for 'tutorialkart.com' with roles like CEO, CFO, COO, SVP, and VP. The 'Sales Manager' role is highlighted in the hierarchy. At the bottom of the dialog, there are 'Save' and 'Cancel' buttons.

- Select all users from the picklist.
- Now all users available in Salesforce account will be displayed in available user section.
- Select the user to which this role is to be assigned.
- Click on Save button.

Before creating role hierarchies in Salesforce we have to set [Organization wide default](#) settings. To restrict users from automatic accessing to the data we have to deselect Grant Access Using Hierarchies.

- Grant Access Using Hierarchies is enabled to all object by default.
- We can deselect Grant Access Using Hierarchies for custom objects only.

Go to [Security Control](#) | [Sharing Settings](#) | [Edit](#).

- In Managing sharing settings we have to select custom object only.

# Sharing Settings

[Help for this Page](#) ?

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data.

Manage sharing settings for: Hospital

Enable External Sharing Model

## Default Sharing Settings

### Organization-Wide Defaults

[Organization-Wide Defaults Help](#) ?

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Hospital	Public Read/Write	Public Read/Write	<input checked="" type="checkbox"/>

### Other Settings

[Other Settings Help](#) ?

Manager Groups  [i](#)

## Sharing Rules

### Hospital Sharing Rules

[Hospital Sharing Rules Help](#) ?

No sharing rules specified.

## Sharing Overrides

### Profiles That Override Hospital Sharing

[Sharing Overrides Help](#) ?

**i** Organization-wide permissions affect all objects in the organization. Object permissions affect only the given object.  
[Tell me more!](#) [Don't show this message again](#)

Profile	Custom Profile	Organization-Wide Permissions		Hospital Permissions	
		View All Data	Modify All Data	View All	Modify All
<a href="#">Analytics Cloud Integration User</a>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<a href="#">Salesforce admin</a>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">System Administrator</a>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">system_admin</a>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- Go to Organization wide defaults settings. Click on Edit button.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Public Read/Write/Transfer	<input checked="" type="checkbox"/>
Account and Contract	Public Read/Write	Public Read/Write	<input checked="" type="checkbox"/>
Order	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Contact	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Asset	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Opportunity	Public Read/Write	Public Read/Write	<input checked="" type="checkbox"/>
Case	Public Read/Write/Transfer	Public Read/Write/Transfer	<input checked="" type="checkbox"/>
Campaign	Public Full Access	Public Full Access	<input checked="" type="checkbox"/>
User	Public Read Only	Private	<input checked="" type="checkbox"/>
Activity	Private	Private	<input checked="" type="checkbox"/>
Calendar	Hide Details and Add Events	Hide Details and Add Events	<input checked="" type="checkbox"/>
Price Book	Use	Use	<input checked="" type="checkbox"/>
Coaching	Private	Private	<input checked="" type="checkbox"/>
Goal	Private	Private	<input checked="" type="checkbox"/>
Macro	Private	Private	<input checked="" type="checkbox"/>
Metric	Private	Private	<input checked="" type="checkbox"/>
Streaming Channel	Public Read/Write	Public Read/Write	<input checked="" type="checkbox"/>
Fr	Public Read/Write	Public Read/Write	<input checked="" type="checkbox"/>
Hospital	Public Read/Write	Public Read/Write	<input type="checkbox"/>
Pharma Product	Public Read/Write	Public Read/Write	<input checked="" type="checkbox"/>
Sales Team	Public Read/Write	Public Read/Write	<input checked="" type="checkbox"/>
www.tutorialkart.com	Public Read/Write	Public Read/Write	<input checked="" type="checkbox"/>

**Other Settings**

Standard Report Visibility  Manual User Record Sharing  Manager Groups

Now a list of all object in user account will be displayed. Select custom object as shown above and deselect Grant Access Using Hierarchies as shown above. Finally click on Save button.

Grant Access Using Hierarchies means the higher role get access to their lower roles. In Salesforce Role hierarchies, a manager get access to its subordinates. As shown above Grant Access Using Hierarchies are enabled for custom and standard object. We can't disable Grant Access Using Hierarchies because by default it is the behaviour of Role Hierarchy. But we can disable for custom object as shown above.

## Conclusion.

In this [Salesforce admin tutorial](#) we have learned about Role Hierarchies and their settings. In our upcoming [Salesforce tutorial](#) we are going to learn about [Public Groups in Salesforce](#).

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