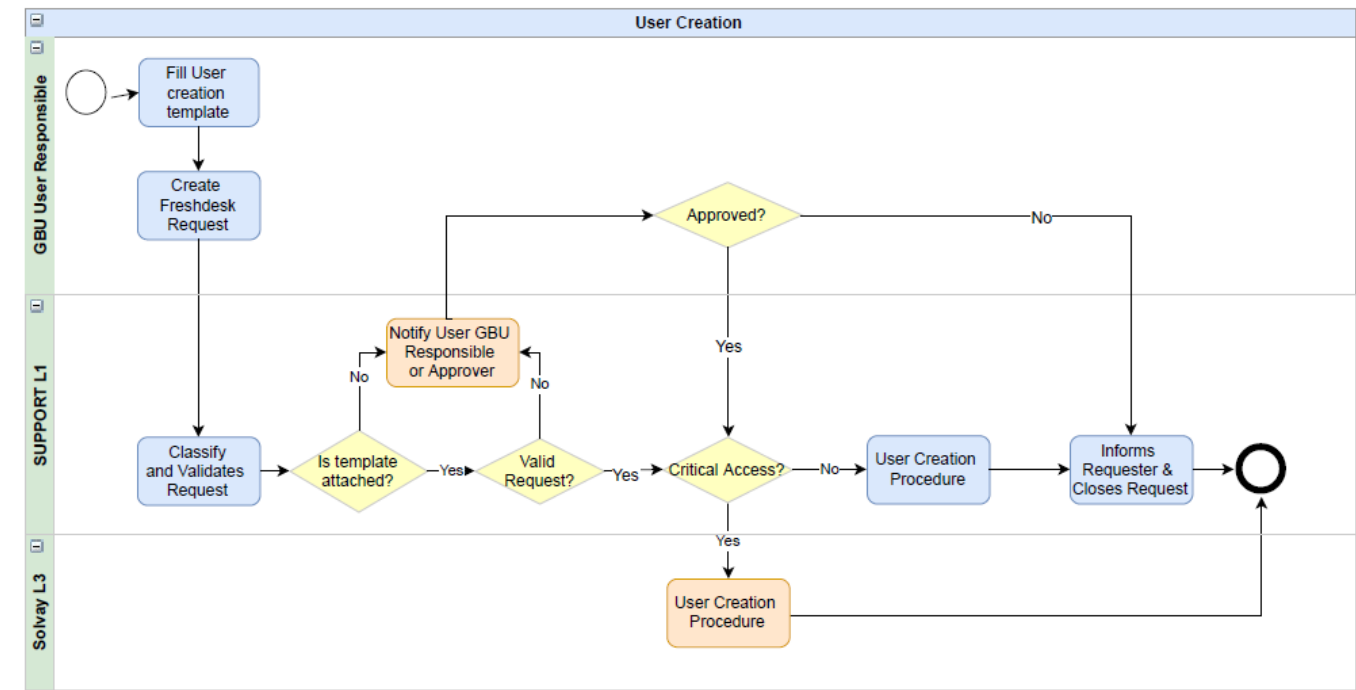


iCare User Creation

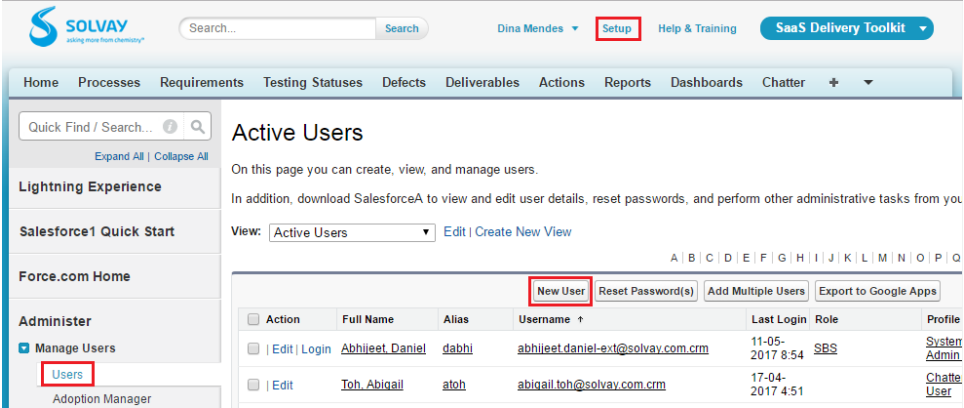
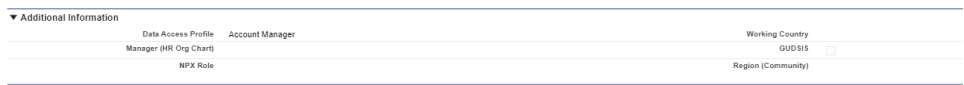
Objective and Scope	Table of Contents
The purpose of this Section is to provide a step by step procedure for User Configuration in the iCare CRM application, in compliance with Solvay Information Security Policies. This procedure applies to: - iCare CRM Salesforce.com IS Solution - All iCare CRM end Users and their GBU User Responsible - IT users: both Solvay internal employees working for IS and external IT subcontractors	- Objective and Scope - User Creation Principles - User Creation Procedure

User Creation Principles
New User: a new user is when there is no user Account (Active or Inactive) for that user's email address.



0	Confirm that Freshdesk Ticket is for New User Creation and that it contains the User Creation form attached and it's filled in properly (in particular, user to replace /user to clone) Analyse if Request has been requested and approved by the Manager or a colleague of the users to provide an access, on behalf of the Manager. If the request is coming from the user's manager or colleague with all necessary information, then proceed to User Creation Procedure. No need to ask for validation. If request is for a non-SPP user (External, Contractor, Trainee...) please send a Freshdesk note to Sarah Chatten to ask confirmation. The creation form tells you if it is a non-SPP user (cf. "End of Contract date").
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User Creation Procedure

1	Validate that it is a New User creation request: a new user is when there is no user Account (Active or Inactive) for that user's email address Use Salesforce Global search to confirm.	blocked URL
2	Start User Creation: Go to Setup Manage User Users Click 'New User' button	
3	According to the user template received, fill in the 'User General Information' section:	
3.1	Make Sure that the username has the correct termination : - For PROD: email address. spp - For UAT email address. spp.uat Title - Company = SOLVAY SPECIALTY POLYMERS or Composite Materials depending on what has been filled-in in the form.	
3.2	Fill in: Role: the same as "User to clone" (in form) Profile: the same as "User to clone" (in form) - Check the Box: Force.com Flow User - Check the Box: Salesforce1 User	blocked URL
3.3	If available, fill in the following contact information	blocked URL
4	Fill in the Mailing Address section The Mailing address is the one of the Solvay Site; It is indicated in the form. If not provided at user template, you can use a reference user working in the site	blocked URL
5	In Additionnal Information section Data Access Profile Working Country Manager (HR Org Chart)	

6	In HR Data Section • SCP User • GBU according to the GBU of the requestor. If Organization in the helix ticket is not Specialty Polymers or Composite Materials, then ask the CRM Champion • Leave other fields empty	HR Data HR Personal Number HR Region u HR Operational Mgr HR Functional Area SCP User ☐ GBU Specialty Polymers/Composite Materials ▼ Company SOLVAY N.V/ S.A. Organization F INFORMATION TECHNOLOGY
7	Fill in the Locale Settings section according to the working Country in user template received (Assign using Corresponding Table) Sources for • Locale Settings • Time Zones • Language = English • Currency = EUR - Euro	blocked URL
8	Fill in the Approver Settings section • Manager	Approver Settings Delegated Approver Manager Receive Approval Request Emails Only if I am an approver ▼ ☒ Generate new password and notify user immediately
9	Click 'Save' without ticking this box. It is not needed anymore as the SSO is enabled. Provide the link to connect to user: https://solvay-spp-crm.lightning.force.com/ UAT link : https://solvay-spp-crm-uat.lightning.force.com/	Approver Settings Delegated Approver Manager Receive Approval Request Emails Only if I am an approver ▼ ☐ Generate new password and notify user immediately Save Cancel
10	Identify if additional Permission Sets/Public Groups/Other Considerations are required (Reference : User to clone) • How to add a Permission Set • How to add a Public Group Each iCare user need to be assigned to the Pardot check step 12	
11	~~Assignment of Gridbuddy Package (Upon request, only in Production Environment) - Eligible Profiles~~	

11.1	Once the new user is created, you need to make sure he/she get access to the Package To assign the new user to 2 packages above, Go to: Setup > Build > Develop > Installed Packages	blocked URL																												
11.2	For each package press 'Manage Licenses': Note: This step could be also done from the user page after saving or for further checking purposes.	Uninstall Manage Licenses GridBuddy Description GridBuddy. Multi-object data management for Salesforce. Uninstall Salesforce International Mapping using Google Maps Description																												
11.3	Then press 'Add Users':	Package Details GridBuddy Back to Previous Page <table><tr><td>Package Name</td><td>GridBuddy</td></tr><tr><td>Status</td><td>Active</td></tr><tr><td>Expiration Date</td><td>Does not Expire</td></tr></table> A B C D E F Licensed Users Add Users Remove Multiple Users <table><tr><td>Action</td><td>Full Name ↑</td><td>Role</td></tr><tr><td>Remove</td><td>Abbate, Rina</td><td>Tecnoflon PM</td></tr><tr><td>Remove</td><td>Ahmed, Shayel</td><td>Jupiter Task Force</td></tr></table>	Package Name	GridBuddy	Status	Active	Expiration Date	Does not Expire	Action	Full Name ↑	Role	Remove	Abbate, Rina	Tecnoflon PM	Remove	Ahmed, Shayel	Jupiter Task Force													
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Remove	Ahmed, Shayel	Jupiter Task Force																												
11.4	Select the user you have just created. When you select a user, he is added in the second part of the screen. So click on 'Add':	Add Users GridBuddy View: Active Users Edit Create New View Available Users Select Shown Deselect Shown Desele <table><tr><td>Action</td><td>Full Name ↑</td><td>Alias</td><td>Username</td></tr><tr><td>☒</td><td>Adams, Bob</td><td>USJCRVA</td><td>bob.adam</td></tr><tr><td>☐</td><td>Adams, Mark</td><td>-</td><td>mark.adam</td></tr><tr><td>☐</td><td>Akahoshi, Yumiko</td><td>JP00501</td><td>yumiko.ai</td></tr><tr><td>☐</td><td>Alvarado, Migdalia</td><td>USJQMXA</td><td>migdalia.a</td></tr><tr><td>☐</td><td>Anderson, Wayne</td><td>-</td><td>wayne.an</td></tr></table> Selected Users <table><tr><td>Action</td><td>Full Name</td></tr><tr><td>☒</td><td>Adams, Bob</td></tr></table> Add Cancel	Action	Full Name ↑	Alias	Username	☒	Adams, Bob	USJCRVA	bob.adam	☐	Adams, Mark	-	mark.adam	☐	Akahoshi, Yumiko	JP00501	yumiko.ai	☐	Alvarado, Migdalia	USJQMXA	migdalia.a	☐	Anderson, Wayne	-	wayne.an	Action	Full Name	☒	Adams, Bob
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Action	Full Name																													
☒	Adams, Bob																													

12
(OPTIONAL)
Pardot
Access

To give user Pardot access :

- Marketing User Checkbox set to true
- Grant Permission Sets :
 - Sales Cloud User
 - Account Engagement Campaign Influence
 - Pardot Lightning

Click save

13

Log in the Global CRM UAT Environment and repeat all the required previous steps from step 1 to step 12.2

BUT....

don't forget to add .invalid at the end of the email address !

Warning: the username must be: email.crm.uat => it must not contain .invalid

SETUP

Users

User

Alice Albini

Permission Set Assignments (5) | Permission Set Assignments Activation Required (0) | Permission Set Group Assignments (0) | Permission Set License Assignments (1) | Lightning Data Purchase Assignments (0) | Personal Groups (0) | Public Group Membership (15+) | Queue Membership (0) | Team (0) | Default Opportunity Team (0) | Default Account Team (0) | Managers in the Role Hierarchy (15+) | Third-Party Account Links (0) | Installed Mobile Apps (0) | Authentication Settings for External Systems (1) | Login History (10+) | User Provisioning Accounts (0)

User Detail

Edit

Sharing

Reset Password

Login

Name	Alice Albini	Role	SPP Strategy
Alias	IT93554	User License	Salesforce
Email	alice.albini@solvay.com [Verified]	Profile	Marcom Users Lightning
Username	alice.albini@solvay.com.spp	Active	☒
Nickname	alice.albini ⓘ	Marketing User	☒
Title	MARCOM Digital Specialist	Offline User	☐
Company	Solvay Spec Polymers	Sales Anywhere User	☐

SETUP

Users

▼ CloudCraze

Currency

Edit

Sharing

Reset Password

Login

Permission Set Assignments

Edit Assignments

Permission Set Assignments Help ?

Action	Permission Set Label	Date Assigned	Expires On
Del	Account Engagement Package	18/09/2018	
Del	Campaign Influence	17/09/2020	
Del	Pardot Lightning	16/09/2020	

14	Go back to the ticket and send this email to the requestor before closing the ticket: Hello XXX Welcome to Salesforce! Your username has been created in Syensqo's Salesforce CRM system. To get started, you can log in to Salesforce.com using the following URL: https://syensqo-icare.lightning.force.com If you are connected to the Syensqo network (e.g., at your office, at another Syensqo site, at your hotel using the hotel's internet connection with your personal token, etc.), the link above is all you need to connect, you do not need to enter a username or password. If you are NOT connected to the Syensqo network (e.g., you are off-site, you are using an internet connection without your personal token, etc.): You can still use the link above but be aware that your Syensqo username and password will be requested (e.g. the SSO identifications that you enter when accessing your Syensqo laptop). If you have any issues with these procedures, please feel free to contact the support team. We will be happy to help you! Thanks & Regards, CRM Team	
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Authorizations & Roles		
Author(s)	Verification	Approval
Inès Somatri (Support Coordinator)	Dina Mendes IS CRM Analyst	Julien Gasqueton (SF Security Lead)
dd/mm/yyyy	dd/mm/yyyy	01/06/2021

Version Control		
Version	Date	Description
01	20/02/2018	Final Document
02	17/10/2019	Deletion of territory management + update of the user creation form
03	01/06/2021	Update after SSO implementation