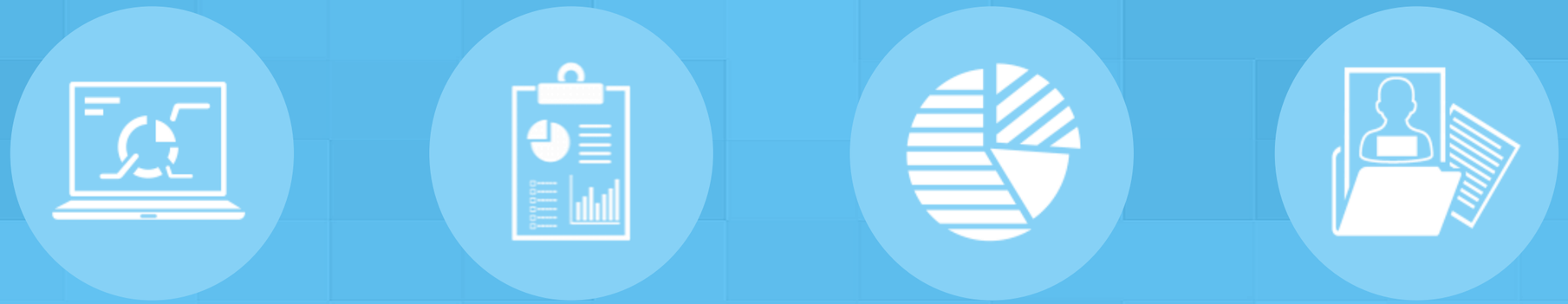
Salesforce Certified Admin and App Builder

Lesson 6—Profiles



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What You'll Learn

- Standard Profiles and Assigning Page Layouts
- Field-Level Security and Tab Settings
- Record Type Settings and Admin Permissions
- Standard and Custom Object Permissions
- Password Policies and Session Timeout

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Standard Profiles Overview

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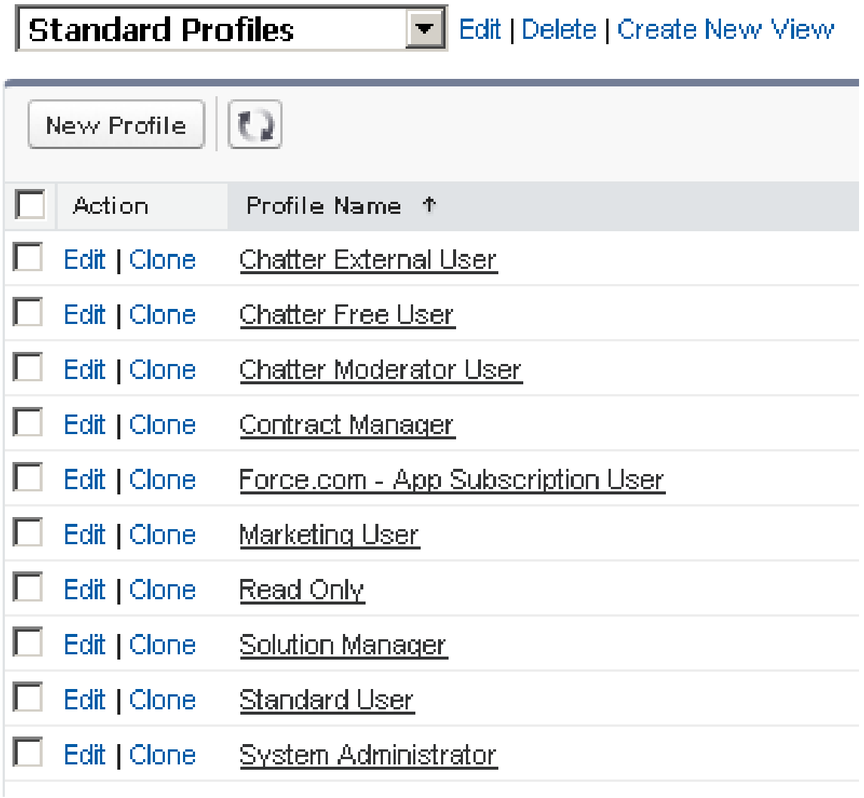
Standard Profiles Overview

Following are the features of Standard Profile:

- Standard Profiles are included with Salesforce.
- Object-level and user permissions cannot be changed.
- The profiles cannot be deleted.



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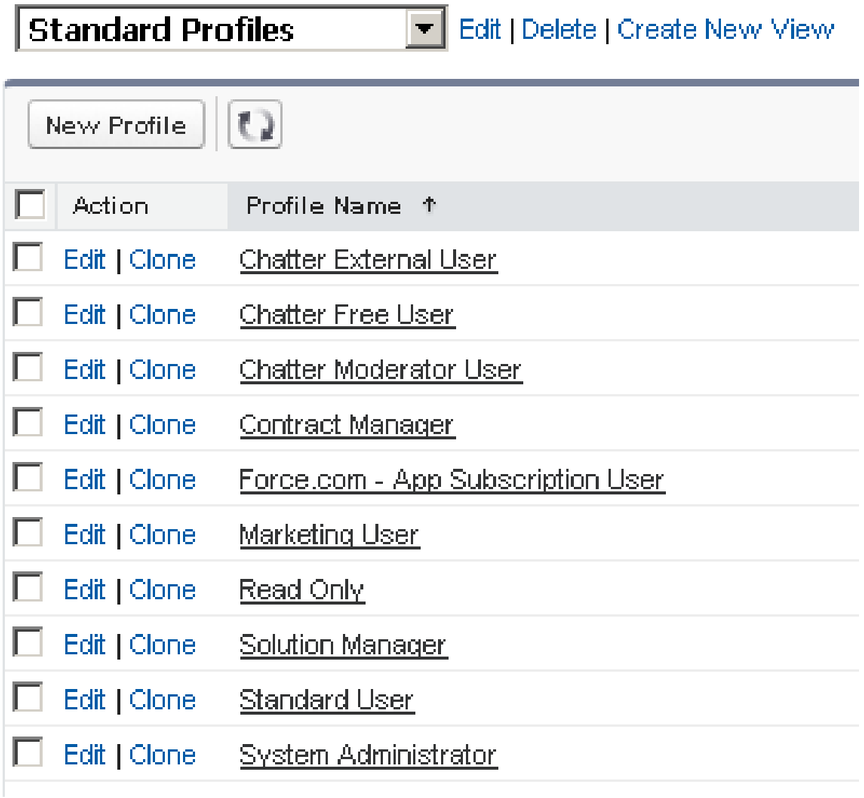
Standard Profiles Overview (contd.)

The following profiles are enabled by default in Salesforce:

- System Administrator: configures and customizes Salesforce
- Standard User: views, edits, and deletes records they can access
- Solution Manager: manages standard user and published solutions
- Marketing User: imports standard user and leads
- Contract Manager: manages standard user and contracts
- Read Only: can only view records to which they have access



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Assigning Page Layouts

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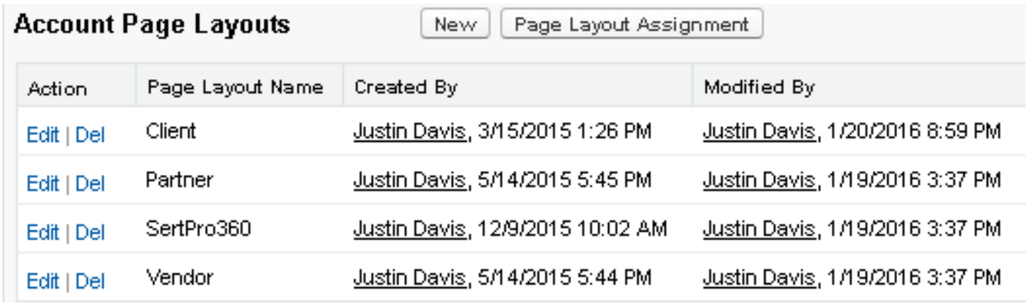
Assigning Page Layouts

Remember the following when assigning page layouts:

- A user's profile determines the page layout they see
- If your company is using record types, the combination of record type and profile determines the page layout
- You can make changes to the page layout assignments
- Click Manage Users
- Click Profiles
- Select a Profile
- Click Edit Assignment
- Use the table to specify the page layout
- Click Save



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Field-Level Security

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Field-Level Security

Admins can restrict user access to view and edit fields in:

- Detail and edit pages, Related lists, List views
- Reports, Connect Offline
- Email and mail merge templates
- Custom links
- The partner and Salesforce Customer Portal
- Synchronized and Imported data

Complaint Field-Level Security for profile

Force.com - App Subscription User

Save Cancel

Field Name	Field Type	Visible	Read-Only
Cloud Creations Involvement	Picklist (Multi-Select)	☑	☐
Complaint About	Lookup	☑	☐
Complaint By	Text	☑	☐
Complaint Title	Text	✓	☐
Created By	Lookup	✓	✓

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Field-Level Security (contd.)

The fields that users see on detail and edit pages are a combination of page layouts and field-level security settings.

The most restrictive field access settings of the two always apply.

Complaint Field-Level Security for profile

Force.com - App Subscription User

Save Cancel

Field Name	Field Type	Visible	Read-Only
Cloud Creations Involvement	Picklist (Multi-Select)	☑	☐
Complaint About	Lookup	☑	☐
Complaint By	Text	☑	☐
Complaint Title	Text	✓	☐
Created By	Lookup	✓	✓

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Custom App Settings and Access

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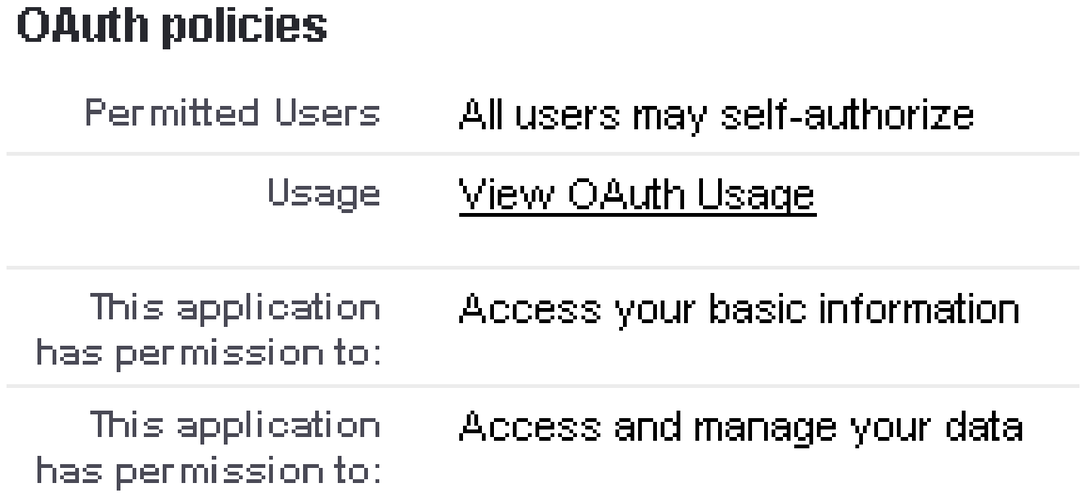
Custom App Settings and Access

Following are the features of Custom App Settings:

- The Connected App Detail page shows you information about your organization's connected apps along with the app version and permitted users.
- You can edit and check usage of the connected app, and associate profiles and permissions with the app.



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Tab Settings

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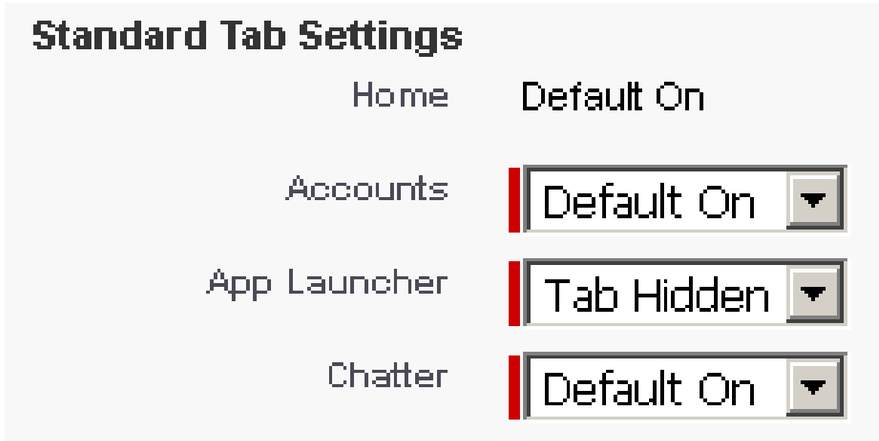
Tab Settings

Remember the following key points when customizing tab settings:

- Tab settings specify whether a tab appears in the All Tabs page or is visible in its associated app.
- The three tab settings are:
    1. Tab Hidden: the tab isn't visible in any apps or All Tabs page.
    2. Default Off: the tab is available on the All Tabs Page.
    3. Default On: the tab is available on the All Tabs Page and appears in its associated app.



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Record Type Settings

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Record Type Settings

Remember the following points when creating record types:

- Set the option to insert your default record type when creating new records.
- You can then bypass the page prompting you to select a record type.
- If you are working with several record types, you may prefer the prompt.

Profiles	Record Types Master
Business Analyst	Client
Chief Accounting Officer	Client
Chief Executive Officer	Client
Chief Legal Officer	Client

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Administrative Permissions

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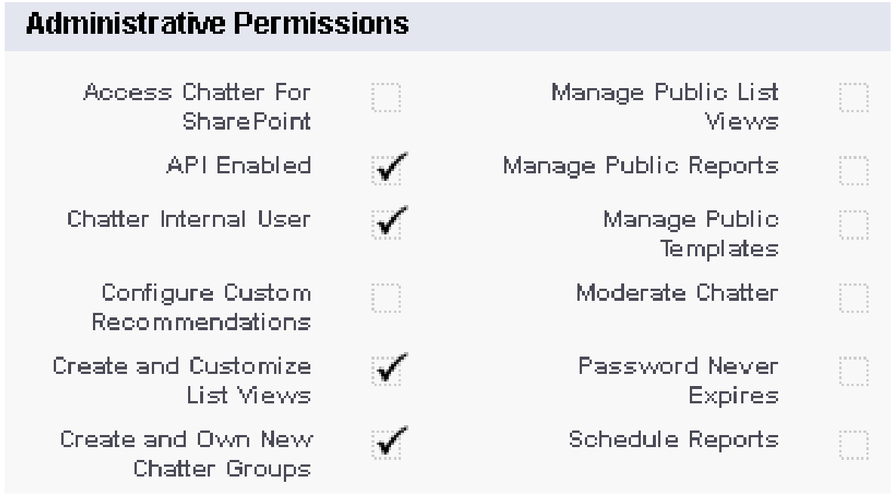
Administrative Permissions

Review the following facts regarding administrative permissions when customizing profiles:

- Most of the permissions listed under administrative permissions are designed for administrators.
- However, depending on the custom profile you have created, some permissions may be applicable for a manager's or department head's profile.



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General User Permissions

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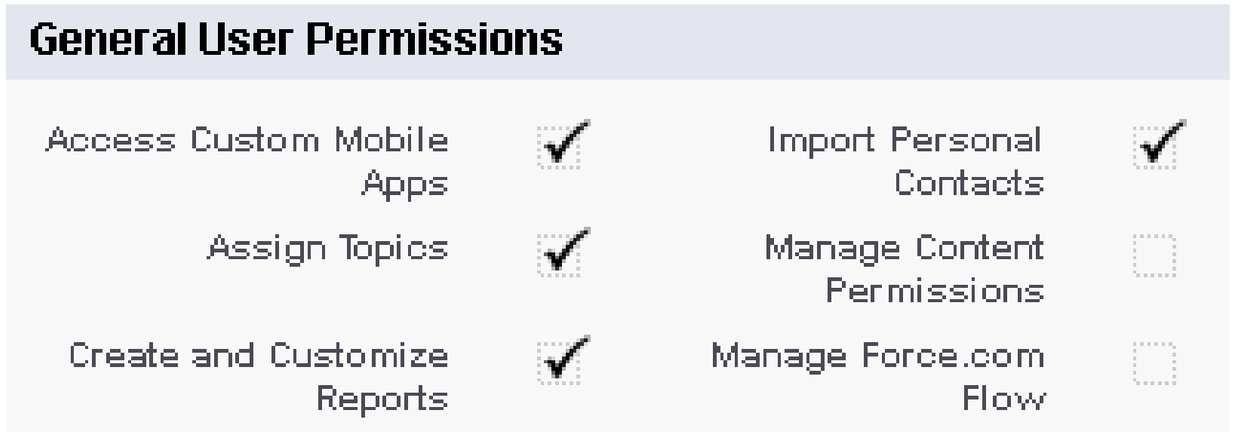
General User Permissions

Keep in mind the following points when adjusting general user permissions:

- User permissions specify what tasks users can perform and what features they can access.
- You can enable user permissions in permission sets and custom profiles.
- To edit general user permissions click edit on the Profile Detail page.
- Check or uncheck the box to enable or disable.



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Standard Object Permissions

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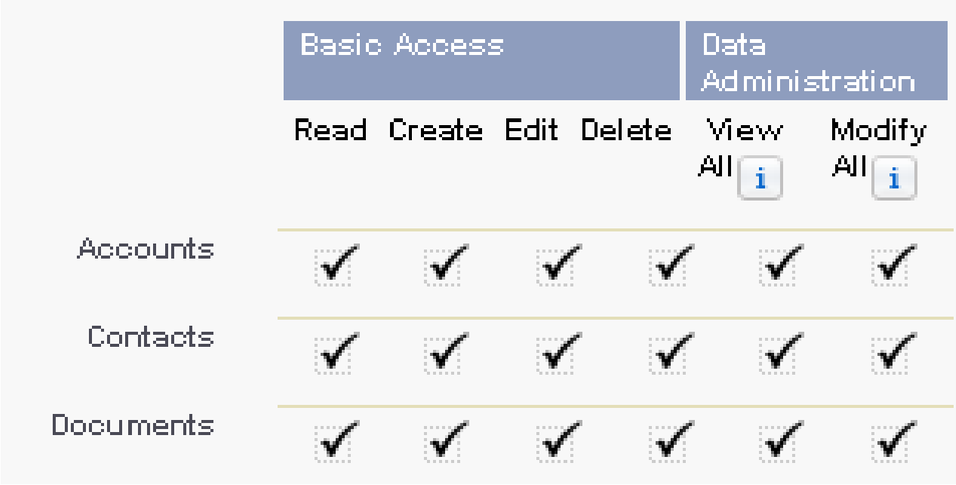
Standard Object Permissions

Remember the following points when adjusting standard object permissions:

- Object permissions specify access which users have to create, read, edit, and delete records for each object.
- You can manage object permissions in permission sets and profiles.



	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Accounts	✓	✓	✓	✓	✓	✓
Contacts	✓	✓	✓	✓	✓	✓
Documents	✓	✓	✓	✓	✓	✓

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Custom Object Permissions

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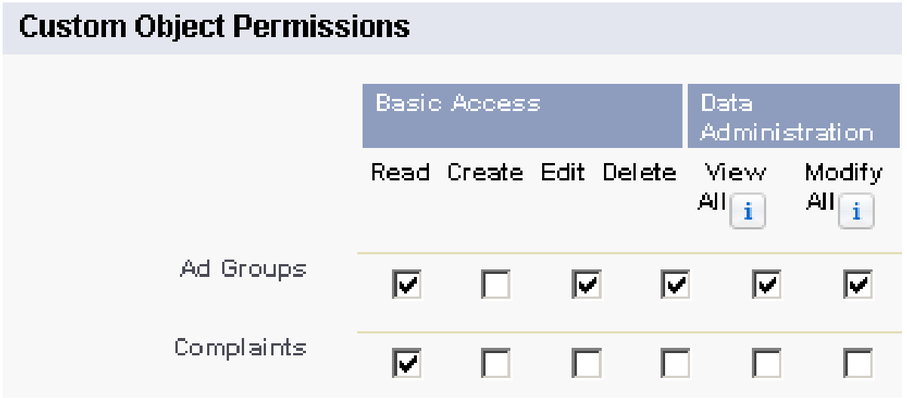
Custom Object Permissions

Remember the following key points:

- Custom objects are created by System Administrators.
- Custom objects are used for building applications for specific departments.
- Custom object permissions work in the same manner as standard object permissions.



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Password Policies and Session Timeout

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Password Policies and Session Timeout

Remember the following points:

- You can customize the session timeout and password requirements per profile.
- The settings for session timeout and password policies at the profile level override the settings at the organization level.

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Login Hours and IP Ranges

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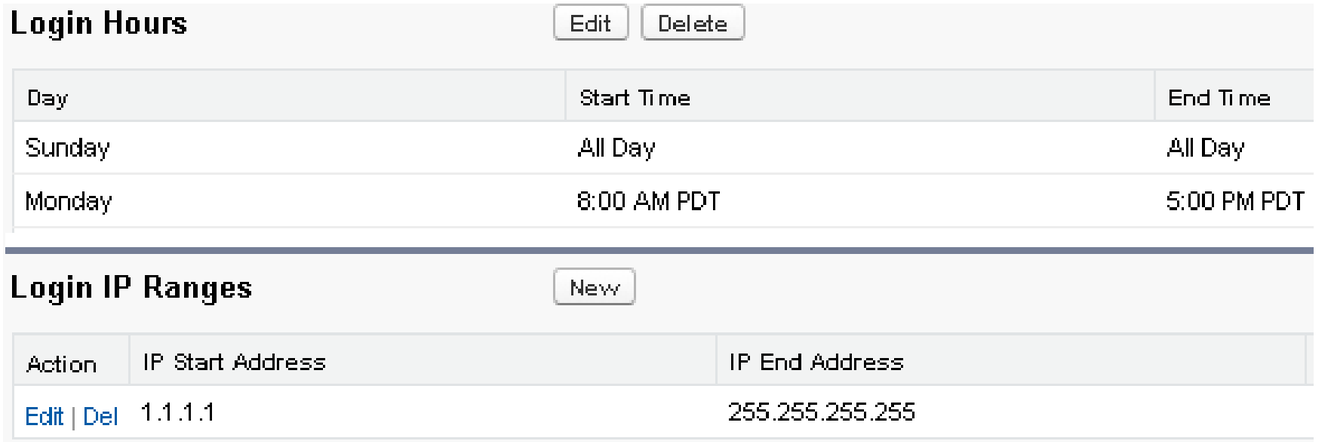
Login Hours and IP Ranges

Remember the following key points:

- You can control login access on a user's profile by specifying a range of IP addresses.
- When you define IP address restrictions for a profile, any login from a restricted IP address is denied.
- The procedure you use to restrict the range of valid IP addresses on profiles depends on your Edition.



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Enabling Apex and Visualforce Access

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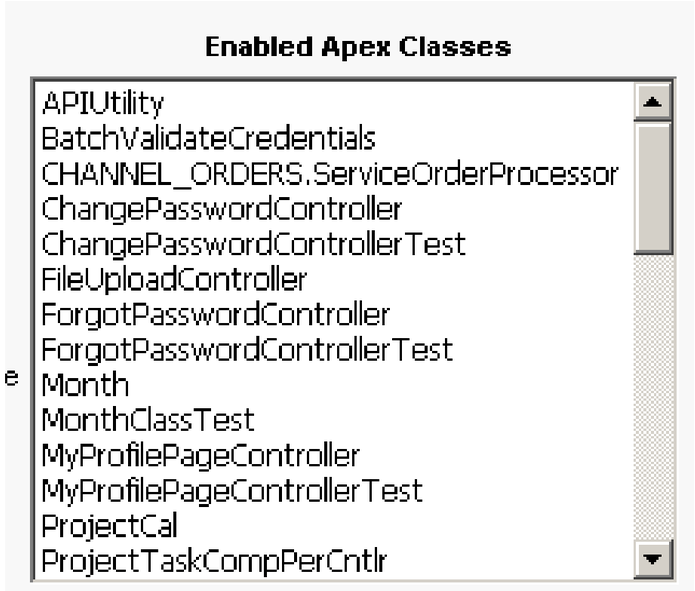
Enabling Apex and Visualforce Access

Remember these important points while enabling Apex and Visualforce access:

- Set Apex and Visualforce security directly from a profile to give that profile's users access to the specified Visualforce page.
- Click Manage Users.
- Click Profiles.
- Choose and click on a profile.
- Click Visualforce Page Access.
- Select the Visualforce Pages that you want to enable or disable.
- Click Add or Remove.
- Click Save.



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Quiz

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QUIZ 1

Where can you adjust administrative permissions?

a. Roles

b. Profiles

c. Public Groups

d. Security Controls

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QUIZ 1

Where can you adjust administrative permissions?

a. Roles

b. Profiles

c. Public Groups

d. Security Controls

The correct answer is **b**.

Administrative permissions are adjusted on the Profile.

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QUIZ 2

Which profile type can be customized?

a. Standard User Profile

b. System Administrator Profile

c. Custom Profile

d. Solution Manager Profile

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QUIZ 2

Which profile type can be customized?

a. Standard User Profile

b. System Administrator Profile

c. Custom Profile

d. Solution Manager Profile

The correct answer is **c**.

Only custom profiles can be customized.

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QUIZ 3

What is the purpose of record type settings on profiles?

a. To restrict record access

b. To grant record access

c. To allow the creation of records with record types

d. To restrict the creation of records with record types

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QUIZ 3

What is the purpose of record type settings on profiles?

a. To restrict record access

b. To grant record access

c. To allow the creation of records with record types

d. To restrict the creation of records with record types

The correct answer is **c**.

Record type settings on profiles allow for the creation of records with the record types.

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QUIZ 4

What is a true statement about page layouts?

a. Page layouts are assigned based on record types and profiles.

b. Page layouts cannot be assigned based on record types and profiles.

c. Page layouts are not available on every object.

d. Page layouts can restrict field-level access to records.

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QUIZ 4

What is a true statement about page layouts?

a. Page layouts are assigned based on record types and profiles.

b. Page layouts cannot be assigned based on record types and profiles.

c. Page layouts are not available on every object.

d. Page layouts can restrict field-level access to records.

The correct answer is **a**.

Page layouts are assigned based on record types and profiles.

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QUIZ 5

What is a true statement regarding enabling Apex and Visualforce on profiles?

a. Apex and Visualforce are not enabled on Profiles.

b. Apex and Visualforce are enabled on Profiles.

c. Standard Users do not need Apex and Visualforce enabled.

d. System Administrators automatically have Apex and Visualforce enabled.

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QUIZ 5

What is a true statement regarding enabling Apex and Visualforce on profiles?

a. Apex and Visualforce are not enabled on Profiles.

b. Apex and Visualforce are enabled on Profiles.

c. Standard Users do not need Apex and Visualforce enabled.

d. System Administrators automatically have Apex and Visualforce enabled.

The correct answer is **b**.

Apex and Visualforce are enabled on Profiles.

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Case Study

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Case Study

Scenario | Analysis | Solution

United Containers needs a way to restrict access to certain fields on contact and lead records. Currently, there is sensitive information such as social security numbers and bank account information which the company does not want sales people to see. The company needs to selectively control which field data can be viewed, which can be hidden, and which can be viewed but not edited.

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Case Study

Scenario | Analysis | Solution

United Containers decided to implement custom profiles for the following reasons:

1. Sales people can have access to certain fields, while restricting access to other fields.
2. Record type permissions can be granted for better data integrity.
3. Login hours can be restricted to increase security.

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Scenario | Analysis | Solution

United Containers took the following steps to implement custom profiles:

1. A new custom profile was created called ‘Salespeople’.
2. The Salespeople profile was customized to restrict access to sensitive information.
3. The Salespeople profile was modified to allow only certain record types.
4. The Salespeople profile had a time restriction added.

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Key Takeaways

- Profiles can be modified to provide granular access to security settings.
- Roles, sharing rules, and organizational defaults work with profiles.
- Only one profile can be assigned to a user at any time.
- Profiles are associated with specific license types.
- Standard profiles offer limited customization options.

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This concludes ‘Profiles.’

The next lesson is ‘Chatter.’

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