ADMINISTRATION ESSENTIALS FOR NEW ADMINS (SECURITY AND DATA ACCESS)

Exercise Guide

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4-1: Restrict Login Hours and IP Ranges

Goal:

Accounts Receivable users should only be able to log in during the company's standard office hours and on the company network only.

Tasks:

1. Restrict login hours on the Accounts Receivable User profile to 8am-6pm, Monday to Friday.
2. Restrict the login IP range on the Accounts Receivable User profile to just the company network.

Time:

5 minutes

Instructions:

1. Restrict login hours on the Accounts Receivable User to 8am-6pm, Monday to Friday, and restrict the login IP range to just the company network.
   A. Click **Setup | Manage Users | Profiles**.
   B. Click **Accounts Receivable User**.
   C. In the System section, click **Login Hours**.
   D. Click **Edit** and set up the schedule.

      Monday: **8:00 AM** to **6:00 PM**
      Tuesday: **8:00 AM to 6:00 PM**
      Wednesday: **8:00 AM** to **6:00 PM**
      Thursday: **8:00 AM** to **6:00 PM**
      Friday: **8:00 AM** to **6:00 PM**
      Saturday: **12:00 AM** to **12:00 AM**
      Sunday: **12:00 AM** to **12:00 AM**

   E. Click **Save**.
2. Restrict the login IP range on the Accounts Receivable User profile to just the company network.
   A. At the top of the profile, click the **arrow** beside Login Hours and select **Login IP Ranges**.
   B. Click **Add IP Ranges** and enter the addresses.

      IP Start Address: `192.168.33.64`
      IP End Address: `192.168.33.126`

   C. Click **Save**.

D. Select **Save this IP Range even if it does not cover my current IP address**, and then click **Save**.

4-2: Update Account Object Permissions

Goal:

John Wiseman, CEO, wants to ensure all users have access to the objects they need to do their job, but wants to restrict the ability to delete records to just Executive Users, the Support team, and temporarily to Courtney Brown, from Sales Operations.

Tasks:

1. Enable enhanced profile list views.
2. Create a new profile view for Account object permissions.
3. Mass update Delete permissions as per the table provided below.
4. Log in as Allison Wheeler and Courtney Brown to test the permissions.
5. Create the Delete Accounts permission set and assign it to Courtney Brown.
6. Log in as Courtney Brown to test the permission set.

Time:

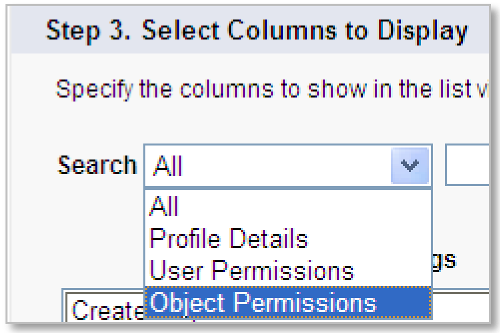
10 minutes

Instructions:

1. Enable enhanced profile list views.
   A. Click **Setup | Customize | User Interface**.
   B. Select the **Enable Enhanced Profile List Views** checkbox.
   C. Click **Save**.
2. Create a new profile view for Account object permissions.

   Note: The list views for the other objects have already been created for you.

   A. Click **Setup | Manage Users | Profiles**.
   B. Click **Create New View**, and then complete the New View screen.
      i. View Name: `Account Object Permissions`
      ii. Setting: **Custom**
      iii. Operator: **equals**
      iv. Value: `True`
      v. Search: **Object Permissions**



vi. Available Settings: **Account: Read**, **Account: Create**, **Account: Edit**, **Account: Delete** (Hold **CTRL** to select all at the same time.)

C. Click **Add**.
D. Click **Save**.
E. From the View picklist menu, choose **Account Object Permissions**.

3. Mass update Delete permissions as per the table provided below. Step 3A and 3B show you two different ways to do this. If you did not create the Recruting User profile previously, disregard updating that profile's delete permissions.

Profile Name	Account: Read	Account: Create	Account: Edit	Account: Delete
Accounts Receivable User	✓		✓	
Consulting User	✓	✓	✓	
Executive User	✓	✓	✓	✓
General Marketing User	✓	✓	✓	
No Access Profile				
Recruiting User				
Sales User	✓	✓	✓	
Support User	✓	✓	✓	✓
VAR User	✓	✓	✓	

A. To edit a single permission on a profile:

i. Double-click the **permission**.
ii. Make the change on the Edit screen.
iii. Click **Save**.

B. To edit the same permission on more than one profile:

i. Select the **checkboxes** in front of each profile.
ii. Double-click the **permission** to edit on one of the selected profiles.
iii. Make the change on the Edit screen.
iv. Under Apply changes to, select **All "**`n`**" selected records**.
v. Click **Save**.

4. Log in as Allison Wheeler and Courtney Brown to test the permissions.

A. Click **Setup | Manage Users | Users**.
B. In the Action column, click **Login** next to Allison Wheeler.
C. Select the **Sales** app from the App picker.
D. Click the **Accounts** tab, select the **All Accounts** list view, and click **Go!** next to the View picklist.
E. In the Account Name column, click **ABC Labs**.

Notice that the Delete button is available at the top of the Account Detail page because Allison has the Account: Delete permission on her profile.

F. Click **Allison Wheeler | Logout**.
G. In the Action column, click **Login** next to Courtney Brown.
H. Select the **Sales** app from the App picker.
I. Click the **Accounts** tab, select the **All Accounts** list view, and click **Go!** next to the View picklist.
J. In the Account Name column, click **ABC Labs**.

Notice that the Delete button is not available at the top of the Account Detail page because Courtney does not have the Account: Delete permission on her profile.

K. Click **Courtney Brown | Logout**.

5. Create a permission set to grant the Delete Account permission set to Courtney Brown.

A. Click **Setup | Manage Users | Permission Sets**.
B. Click **New**, and then complete the Create screen:

i. Label: `Delete Accounts`
ii. API Name: (This field auto-populates)
iii. Description: `Grants Delete Accounts permission.`
iv. User License: **Salesforce**

C. Click **Save**.
D. In the Apps section, click **Object Settings**.
E. Click **Accounts**.
F. Click **Edit.**
G. Select the Delete checkbox under Object Permissions. (Note: Edit and Read will be

automatically checked).

H. Click **Save**.
I. Click **Manage Assignments**.
J. Click **Add Assignments**.
K. In the Action column, check the **box** next to Brown, Courtney.
L. Click **Assign**.
M. Click **Done**.

6. Log in as Courtney Brown to test the permission set.

A. Click **Setup | Manage Users | Users**.
B. In the Action column, click **Login** next to Courtney Brown.
C. Click the **Accounts** tab, select the **All Accounts** list view, and click **Go!** next to the View picklist.
D. In the Account Name column, click **ABC Labs**.

Notice that the Delete button is now available at the top of the Account Detail page because Courtney now has the Account: Delete permission set..

E. Click **Courtney Brown | Logout**.

4-3: Grant Access to Lightning Experience

Goal:

As part of a larger rollout of Lightning Experience to sales users, the management team has decided to grant permission for its use to a pilot group of three sales representatives.

Tasks:

1. Create a permission set to grant the Lightning Experience User system permission to Kevin Bailey, Diego Cruz, and David Hudson.
2. Log in as David Hudson and Courtney Brown to test the permissions.

Time:

10 minutes

Instructions:

1. Create a permission set to grant the Lightning Experience User system permission to Kevin Bailey, Diego Cruz, and David Hudson.
   A. Click **Setup | Manage Users | Permission Sets**.
   B. Click **New**, and then complete the Create screen:
      i. Label: `Grant Access to Lightning Experience`
      ii. API Name: (This field auto-populates)
      iii. Description: `Grants access to Lightning Experience.`
      iv. User License: **Salesforce**
   C. Click **Save**.
   D. In the System section, click **System Permissions**.
   E. Click **Edit**.
   F. Select the checkbox next to Lightning Experience User.
   G. Click **Save**.
   H. Click **Manage Assignments**.
   I. Click **Add Assignments**.
   J. In the Action column, check the **box** next to Bailey, Kevin; Cruz, Diego; and Hudson, David.
   K. Click **Assign**.
   L. Click **Done**.

2. Log in as David Hudson and Courtney Brown to test the permissions.

A. Click **Setup | Manage Users | Users**.
B. In the Action column, click **Login** next to David Hudson.
C. Is David using the Lightning Experience? ________
D. Click **Logout as David Hudson**.
E. In the Action column, click **Login** next to Courtney Brown.
F. Is Courtney using the Lightning Experience? ________
G. Click **Courtney Brown | Logout**.

4-4: Setting Organization-Wide Defaults

Goal:

As a result of AW Computing's data access requirements, you have decided to use a hybrid data access model. You need to edit the organization-wide defaults to determine the appropriate record access.

Tasks:

1. Set Lead, Account, Contact, and Campaign default internal access to public read only.
2. Set Opportunity and Case default internal access to private.
3. Set Applicant, Interviewer, and Position default internal access to private.

Time:

10 minutes

Instructions:

1. Set Lead, Account, Contact, and Campaign default internal access to public read only.
   A. Click **Setup | Security Controls | Sharing Settings**.
   B. Click **Edit**, and then edit the access settings.
      i. Lead: **Public Read Only**
      ii. Account, Contract and Asset: **Public Read Only**
      iii. Contact: **Public Read Only**
      iv. Campaign: **Public Read Only**
2. Set Opportunity and Case default internal access to private.
   A. Opportunity: **Private**
   B. Case: **Private** (Click **OK** on the message that appears)
3. Set Applicant, Interviewer, and Position default internal access to private.
   A. Applicant: **Private**
   B. Interviewer: **Private**
   C. Position: **Private**
   D. Click **Save**, and then click **OK** on the confirmation message.

4-5: Create a Role Hierarchy

Goal:

Following a review of data access, it has been decided that:

For reporting and monitoring purposes, the VP of Global Sales and the Sales Operations Team require view and edit access to all records in the Sales organization.

Sales Directors require access to their teams' records.

Sales reps should have view access only on cases they do not own associated to their accounts.

Tasks:

1. Build out the role hierarchy to include the unshaded roles in the diagram.
2. Rename the VP Global Sales role to include Sales Operations.

Time:

10 minutes

Instructions:

1. Build out the role hierarchy to include the unshaded roles in the diagram.
   A. Click **Setup | Manage Users | Roles**.
   B. Click **Set Up Roles**.
   C. Click **Expand All**.
   D. Below VP of Global Sales, click **Add Role**, and then complete the new role.
      i. Label: `APAC Sales Director`
      ii. Role Name as displayed on reports: `APAC Sales Director`
         a. Contact Access: **Users in this role can edit...**
         b. Opportunity Access: **Users in this role can edit...**
         c. Case Access: **Users in this role can edit...**
   E. Click **Save & New**. (Click **OK** on any messages that appear.)
   F. Complete the next new role information.
      i. Label: `APAC Sales Rep`
      ii. This role reports to: **APAC Sales Director** (Click the **lookup** button to select.)
      iii. Role Name as displayed on reports: `APAC Sales Rep`
         a. Contact Access: **Users in this role can edit...**
         b. Opportunity Access: **Users in this role can edit...**
         c. Case Access: **Users in this role can view...**

G. Click **Save**. (Click **OK** on any messages that appear.)

2. Rename the VP Global Sales role to include Sales Operations.

   A. Click **Setup | Manage Users | Roles**.
   B. Click **Set Up Roles**.
   C. Next to VP of Global Sales, click **Edit**, and then edit the role.

      i. Label: `VP of Global Sales/Sales Ops`
      ii. Role Name: `VPofGlobalSalesSalesOps`
      iii. Role Name as displayed on reports: `Global Sales`

   D. Click **Save**.

4-6: Assign Users to Roles

Goal:

Now that the sales roles have been created, the users can be assigned to their roles. Once the Sales Operations users have been reassigned, the Sales Operations roles can be deleted.

Tasks:

1. Assign users to their roles per the table.

Role	User
APAC Sales Director	An Lin
APAC Sales Rep	Jin Chang, Fumiko Suzuki
VP Global Sales/Sales Ops	Yuko Ishikawa, Courtney Brown, Tony Jenkins, Alan Wong

2. Delete the Sales Operations and Sales Operations Director roles.
3. For reporting purposes, assign yourself (Admin User) to the CEO role.

Time:

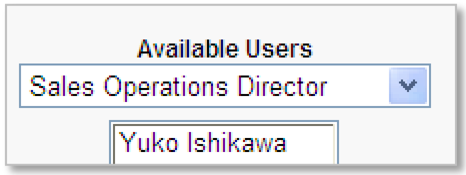
10 minutes

Instructions:

1. Assign users to their roles per the table.
   A. Click **Setup | Manage Users | Roles**.
   B. Click **Set Up Roles**.
   C. Click **Expand All**.
   D. Next to APAC Sales Director, click **Assign**.
      i. From the Available Users list, select **An Lin**.
      ii. Click **Add**.
      iii. Click **Save**.
   E. Next to APAC Sales Rep, click **Assign**.
      i. From the Available Users list, select **Fumiko Suzuki** and **Jin Chang**. (Hold **CTRL** to select all at the same time.)
      ii. Click **Add**.
      iii. Click **Save**.

F. Next to VP Global Sales/Sales Ops, click **Assign**.

   i. From the Available Users picklist, select **Sales Operations Director**.
   ii. From the Available Users list, select **Yuko Ishikawa**.
   iii. Click **Add**.



   iv. From the Available Users picklist, select **Sales Operations**.
   v. From the Available Users list, select **Courtney Brown**, **Tony Jenkins**, and **Alan Wong**. (Hold **CTRL** to select all at the same time.)
   vi. Click **Add**.
   vii. Click **Save**.

2. Delete the Sales Operations and Sales Operations Director roles.

   A. Next to Sales Operations, click **Del**. (Click **OK** on the confirmation message that appears.)
   B. Next to Sales Operations Director, click **Del**. (Click **OK** on the confirmation message that appears.)

3. For reporting purposes, assign yourself (Admin User) to the CEO role.

   A. Next to CEO, click **Assign**.

      i. From the Available Users list, select yourself (**Admin User**).
      ii. Click **Add**.

   B. Click **Save**.

4-7: Create a Role Hierarchy

Goal:

The VP of Services and the Customer Support team require access to all the records their teams are working on.

Tasks:

1. Build out the role hierarchy to include the unshaded roles in the diagram that follows.

Role	User
VP Services	Noah Larkin
Customer Support Director	Roberta Spada
Customer Support Rep	Tim Howe, Robin Kramer, Cara Ng
Sales Engineer	Amy Daniels, Kevin Bailey

2. Assign users to their roles per the table.

Time:

10 minutes

Instructions:

1. Build out the role hierarchy to include the blue roles in the diagram.
   - A. Click **Setup | Manage Users | Roles**.
   - B. Click **Set Up Roles**.
   - C. Click **Expand All**.
   - D. Below CEO, click **Add Role**, and then complete the new role details.
     - i. Label: `VP of Services`
     - ii. Role Name as displayed on reports: `VP of Services`
       - a. Contact Access: **Users in this role can edit...**
       - b. Opportunity Access: **Users in this role can view...**
       - c. Case Access: **Users in this role can edit...**
     - iii. Click **Save & New**.
   - E. Complete the next new role information.
     - i. Label: `Customer Support Director`
     - ii. This role reports to: **VP of Services** (Click the **lookup** button to select.)
     - iii. Role Name as displayed on reports: `Customer Support Director`

a. Contact Access: **Users in this role can edit...**
b. Opportunity Access: **Users in this role can view...**
c. Case Access: **Users in this role can edit...**

iv. Click **Save & New**.

F. Complete the next new role information.

i. Label: `Customer Support Rep`
ii. This role reports to: **Customer Support Director** (Click the **lookup** button to select.)
iii. Role Name as displayed on reports: `Customer Support Rep`

a. Contact Access: **Users in this role can view...**
b. Opportunity Access: **Users in this role can view...**
c. Case Access: **Users in this role can edit...**

iv. Click **Save & New**.

G. Complete the next new role information.

i. Label: `Sales Engineer`
ii. This role reports to: **VP Global Sales/Sales Ops** (Click the **lookup** button to select.)
iii. Role Name as displayed on reports: `Sales Engineer`

a. Contact Access: **Users in this role can view...**
b. Opportunity Access: **Users in this role can edit...**
c. Case Access: **Users in this role can edit...**

iv. Click **Save**.

2. Assign users to their roles as per the table.

A. Click **Setup | Manage Users | Roles**.
B. Click **Set Up Roles**.
C. Next to VP of Services, click **Assign**.

i. From the Available Users list, select **Noah Larkin**.
ii. Click **Add**.
iii. Click **Save**.

D. Next to Customer Support Director, click **Assign**.

i. From the Available Users list, select **Roberta Spada**.
ii. Click **Add**.
iii. Click **Save**.

E. Next to Customer Support Rep, click **Assign**.

i. From the Available Users list, select **Cara Ng**, **Robin Kramer**, and **Tim Howe**.

(Hold **CTRL** to select all at the same time.)

ii. Click **Add**.
iii. Click **Save**.

F. Next to Sales Engineers, click **Assign**.

i. From the Available Users list, select **Amy Daniels** and **Kevin Bailey**. (Hold **CTRL** to select all at the same time.)
ii. Click **Add**.
iii. Click **Save**.

4-8: Create Opportunity Sharing Rules

Goal:

At present, opportunities are only visible to their owners and users above them in the role hierarchy. Create sharing rules for other users who also require access to opportunities.

Tasks:

1. Create a sharing rule to give the Marketing Director read access to all opportunities.
2. Create a public group for all sales reps.
3. Create a sharing rule to give sales reps read access to each other's opportunities.
4. Create a sharing rule to give Accounts Receivable users read/write access to all won opportunities.

Time:

10 minutes

Instructions:

1. Create a sharing rule to give the Marketing Director read access to all opportunities.
   A. Click **Setup | Security Controls | Sharing Settings**.
   B. In the Opportunity Sharing Rules section, click **New**, and then complete the rule details.
      i. Label: `Share All Opportunities with Marketing Director`
      ii. Rule Type: **Based on record owner**
      iii. Opportunity: owned by members of: **Roles and Subordinates: VP of Global Sales/Sales Ops**
      iv. Share with: **Roles: Marketing Director**
      v. Opportunity Access: **Read Only**
   C. Click **Save**, and then click **OK** on the confirmation message.
2. Create a public group for all sales reps.
   A. Click **Setup | Manage Users | Public Groups**.
   B. Click **New**, and then create the new group information.
      i. Label: `Global Sales Reps`
      ii. Grant Access Using Hierarchies: **Select**
      iii. Search: **Roles**
      iv. From the Available Members list, hold **CTRL** and select the members.
         a. Role: **APAC Sales Rep**
         b. Role: **EMEA Sales Rep**
         c. Role: **US Sales Rep**

v. Click **Add**.

C. Click **Save**.

3. Create a sharing rule to give sales reps read access to each other's opportunities.
   A. Click **Setup | Security Controls | Sharing Settings**.
   B. In the Opportunity Sharing Rules section, click **New**, and then complete the rule.
      i. Label: `Share All Opportunities with Global Sales Reps`
      ii. Rule Type: **Based on record owner**
      iii. Opportunity: owned by members of: **Public Groups: Global Sales Reps**
      iv. Share with: **Public Groups: Global Sales Reps**
      v. Opportunity Access: **Read Only**
   C. Click **Save**, and then click **OK** on the confirmation message.
4. Create a sharing rule to give Accounts Receivable users read/write access to all won opportunities.
   A. In the Opportunity Sharing Rules section, click **New**, and then complete the rule details.
      i. Label: `Share Won Opportunities with Accounts Receivable`
      ii. Rule Type: **Based on criteria**
      iii. Field: **Won**
      iv. Operator: **equals**
      v. Value: `True`
      vi. Share with: **Roles: Accounts Receivable**
      vii. Opportunity Access: **Read/Write**
   B. Click **Save**, and then click **OK** on the confirmation message.

4-9: Create Sharing Rules for Recruiting

Goal:

For confidentiality reasons, Applicant, Interviewer, and Position records have been made private. However, members of the recruitment team need to collaborate on each other's records, and VPs need read access to all open Positions.

Tasks:

1. Create a sharing rule to give recruiting users read access to each other's Applicant records.
2. Create a sharing rule to give recruiting users read access to each other's Interviewer records.
3. Create a sharing rule to give recruiting users read/write access to each other's Position records.
4. Create a public group for all VPs.
5. Create a sharing rule to give VPs read access to all open Positions.

Time:

10 minutes

Instructions:

1. Create a sharing rule to give recruiting read users access to each other's Applicant records.
   A. Click **Setup | Security Controls | Sharing Settings**.
   B. In the Applicant Sharing Rules section, click **New**, and then complete the rule details.
      i. Label: `Share Applicants between Recruiters`
      ii. Rule Type: **Based on record owner**
      iii. Applicant: owned by members of: **Roles: Recruiter**
      iv. Share with: **Roles: Recruiter**
      v. Access Level: **Read Only**
   C. Click **Save**, and then click **OK** on the confirmation message.
2. Create a sharing rule to give recruiting users read access to each other's Interviewer records.
   A. In the Interviewer Sharing Rules section, click **New**, and then complete the rule details.
      i. Label: `Share Interviewers between Recruiters`
      ii. Rule Type: **Based on record owner**

   iii. Interviewer: owned by members of: **Roles: Recruiter**
   iv. Share with: **Roles: Recruiter**
   v. Access Level: **Read Only**

B. Click **Save**, and then click **OK** on the confirmation message.

3. Create a sharing rule to give recruiting users read/write access to each other's Position records.

   A. In the Position Sharing Rules section, click **New**, and then complete the rule details.

      i. Label: `Share Positions between Recruiters`
      ii. Rule Type: **Based on record owner**
      iii. Position: owned by members of: **Roles: Recruiter**
      iv. Share with: **Roles: Recruiter**
      v. Access Level: **Read/Write**

   B. Click **Save**, and then click **OK** on the confirmation message.

4. Create a public group for all VPs.

   A. Click **Setup | Manage Users | Public Groups**.
   B. Click **New**, and then complete the group information.

      i. Label: **VPs** (Group Name is filled automatically)
      ii. Grant Access Using Hierarchies: **Select**
      iii. Search: **Roles**
      iv. For: **VP** (click **Find**)

         a. From the Available Members list, hold **CTRL** and select all of the **VP roles**, except for the VP Global Sales/Sales Op role. (Note: We are not adding the VP Global Sales/Sales Op role because it also includes Sales Operations users. We will add Allison Wheeler, the VP of Global Sales, separately.)
         b. Click **Add**.

      v. Search: **Users**
      vi. For: **Allison Wheeler** (click **Find**)

         a. From the Available Members list, select **User: Allison Wheeler**.
         b. Click **Add**.

   C. Click **Save**.

5. Create a sharing rule to give VPs read access to all open Positions.

   A. Click **Setup | Security Controls | Sharing Settings**.
   B. In the Position Sharing Rules section, click **New**, and then complete the rule details.

      i. Label: `Share Open Positions with VPs`
      ii. Rule Type: **Based on criteria**

iii. Field: **Status**
iv. Operator: **equals**
v. Value: `Open`
vi. Share with: **Public Groups: VPs**
vii. Access Level: **Read Only**

C. Click **Save**, and then click **OK** on the confirmation message.

4-10: Set Up Account Teams

Goals:

Sales reps, sales engineers, customer support reps, and consulting reps collaborate on customer accounts, and require access to the opportunities and cases related to accounts that they are working on.

Tasks:

1. Enable account teams.
2. Add new team roles: Pre Sales Engineer and Dedicated Support Rep.
3. Login as Phil Smith and create a default account team to give read-only access to:

    Tim Howe, Dedicated Support Rep

    Amy Daniels, Pre Sales Engineer

4. Add the default team to one of Phil's accounts.

Time:

5 minutes

Instructions:

1. Enable account teams.

    A. Click **Setup | Customize | Accounts | Account Teams**.
    B. Click **Enable Account Teams**.
    C. Select the **Account Teams Enabled** checkbox.
    D. Click **Save**.
    E. Select the **Account Layout** checkbox to add the Account Team related list to the page layout.
    F. Select the **Add to users' customized related lists** checkbox.
    G. Click **Save**.

2. Add new team roles: Pre Sales Engineer and Dedicated Support Rep.

    A. Click **Team Roles**.
    B. Click **New**.
    C. In the text area, enter the picklist values `Pre Sales Engineer` and `Dedicated Support Rep`, each on a separate line.
    D. Click **Save**.

3. Log in as Phil Smith and create a default account team to give read-only access to.

    A. Click **Setup | Manage Users | Users**.
    B. Click **Login** next to Smith, Phil.

C. Click **Phil Smith | My Settings | Personal | Advanced User Details**.
D. In the Default Account Team related list, click **Add**.
E. Add Phil's default account team members.

i. Team Member: **Tim Howe**

a. Accounts: **Read Only**
b. Contacts: **Read Only**
c. Opportunities: **Read Only**
d. Cases: **Read/Write**
e. Team Role: **Dedicated Support Rep**

ii. Team Member: **Amy Daniels**

a. Accounts: **Read Only**
b. Contacts: **Read Only**
c. Opportunities: **Read/Write**
d. Cases: **Read Only**
e. Team Role: **Pre Sales Engineer**

F. Click **Save**.

4. Add the default team to one of Phil's accounts.

A. Click the **Accounts** tab.
B. From the View picklist, select **My Accounts** and click **Go!**
C. Click **ABC Labs**.
D. Hover over the **Account Team** related list link, and click **Add Default Team**.
E. Hover over the **Account Team** related list again to make sure the team was added.
F. Click **Phil Smith | Logout**.

4-11: Manually Share Recruiting Records

Goal:

Allison Wheeler, VP Global Sales, requires one-off read-only access to new applicant records for positions in the Global Sales team.

Tasks:

1. Manually share the Tina Bell applicant record with Allison Wheeler.
2. Log in as Allison Wheeler to test the manual sharing.

Time:

5 minutes

Instructions:

1. Manually share the Tina Bell applicant record with Allison Wheeler.
   A. Click the **Applicants** tab. (If not available, click **All Tabs (+) | Applicants**.)
   B. From the View picklist, select **All** and click **Go!**
   C. Click **Tina Bell**.
   D. Click **Sharing**.
   E. Click **Add**.
   F. Share the applicant record with Allison.
      i. Search: **Users**
      ii. From the Available list, select **Allison Wheeler**.
      iii. Click **Add**.
   G. Click **Save**.
2. Log in as Allison Wheeler to test the manual sharing.
   A. Log in as Allison Wheeler.
      i. Click **Setup | Manage Users | Users**.
      ii. In the Action column, click **Login** next to Wheeler, Allison.
   B. Test the shared position.
      i. Click the **Positions** tab. (If not available, click **All Tabs (+) | Positions**.)
      ii. From the View picklist, select **All** and click **Go!**
      iii. Click **US Sales Rep** to view the record. (Allison can see this position record because we created a sharing rule earlier to share positions with VPs.)
      iv. Test the shared applicant.
      v. Click the **Applicants** tab. (If not available, click **All Tabs (+) | Applicants**.)
      vi. From the View picklist, select **All** and click **Go!**

vii. Click **Tina Bell** to view the record. (Allison can see this applicant record because we manually shared it.)

C. Click **Allison Wheeler | Logout**.

4-12: Set Opportunity Field-Level Security

Goals:

Brent Bassi, VP of Finance, wants to ensure that financial information on opportunities is only accessible to authorized users.

Tasks:

1. Set field-level security on the following fields to be visible and editable for Accounts Receivable Users and Sales Users: Purchase Order No., Credit Card No., CC Exp. Month, and CC Exp. Year.
2. Set field-level security on the Sales Order No. field to be editable for Accounts Receivable Users, and read-only for Sales Users.

Time:

10 minutes

Instructions:

1. Set field-level security on the following fields to be visible and editable for Sales Users: Purchase Order No., Credit Card No., CC Exp. Month, and CC Exp. Year.
   A. Click **Setup | Customize | Opportunities | Fields**.
   B. In the Opportunity Custom Fields & Relationships section, click **Purchase Order No.**
      i. Click **Set Field-Level Security**.
      ii. Clear the **checkbox** in the Visible column header.
      iii. Select the **Visible** checkbox for **Accounts Receivable User**, **Sales User** and **System Administrator**. (Note: System Administrator must also have Field-Level Security set on to have access to fields.)
   C. Click **Save**.
   D. Click the **Back to Opportunity Fields** link.
   E. Repeat steps B-D for the following fields:
      i. **Credit Card No.**
      ii. **CC Exp. Month**
      iii. **CC Exp. Year**
2. Set field-level security on the Sales Order No. field to be editable for Accounts Receivable Users, and read-only for Sales Users.
   A. In the Opportunity Custom Fields & Relationships section, click **Sales Order No**.
      i. Click **Set Field-Level Security**.
      ii. Clear the **checkbox** in the Visible column header.
      iii. Select the **Visible** checkbox for **Accounts Receivable User**, **Sales User** and

System Administrator.

iv. Select the **Read-Only** checkbox for **Sales User**.

B. Click **Save**.