

Profile

- A profile is a group/collection of settings and permissions that define what a user can do in salesforce.
- Profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges.
- You can define profiles by the user's job function. For example System Administrator, Developer, Sales Representative.

Types of profiles in salesforce Standard profiles:

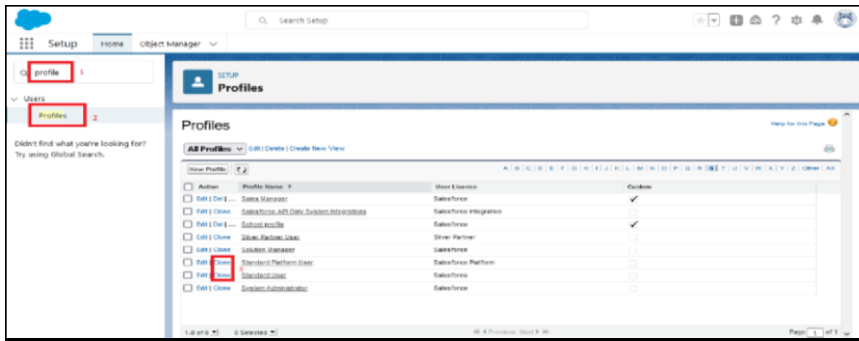
- By default salesforce provide below standard profiles
- We cannot deleted standard ones
- Each of these standard one includes a default set of permissions for all of the standard objects available on the platform

2. Custom Profiles:

- 1. Custom ones defined by us.
- 2. They can be deleted if there are no users assigned with that particular one

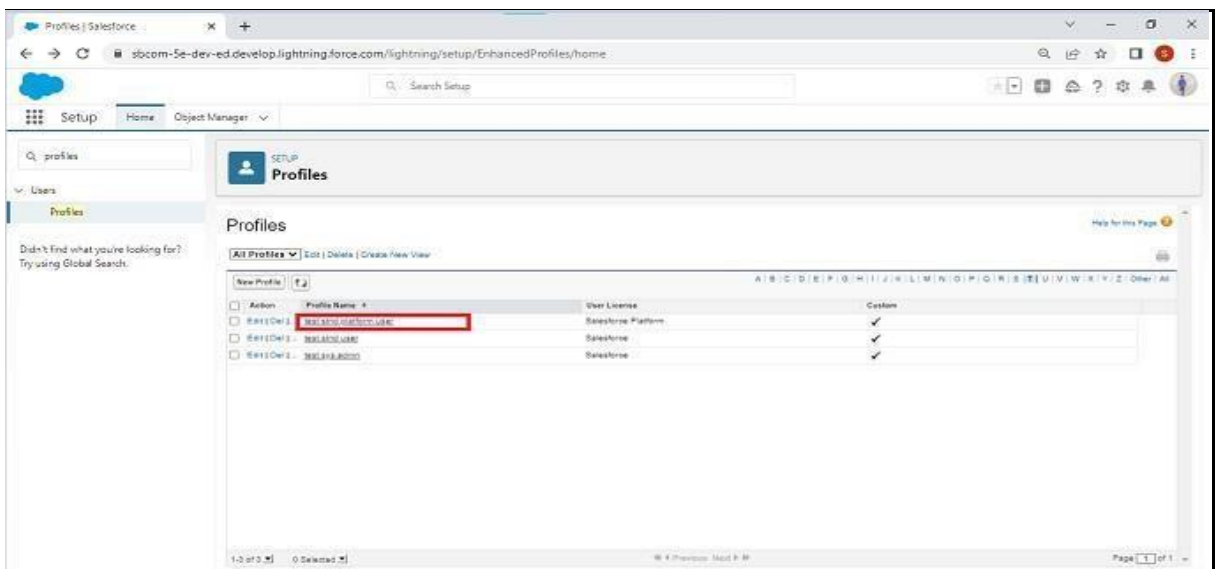
1)Create A Custom Profile

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (standard platform user is pref) and clone that profile

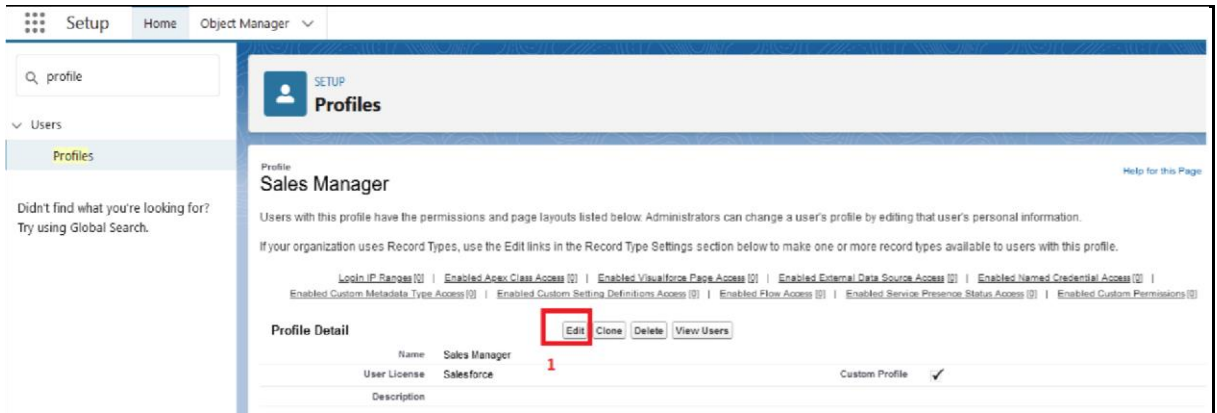


2. Enter a Profile Name(Sales Manager) And click on Save

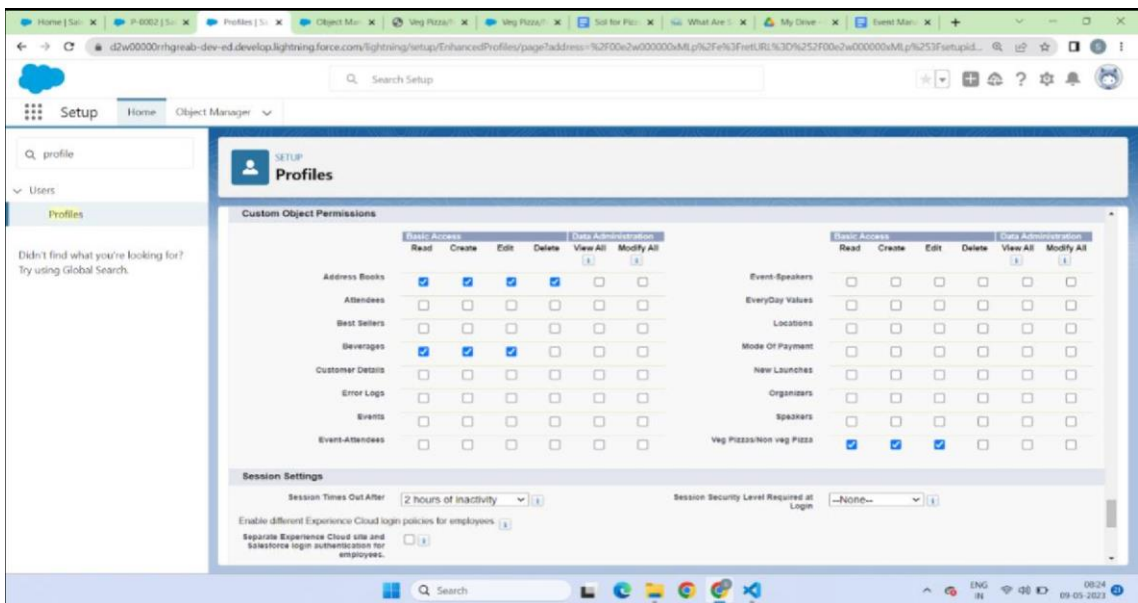
3. Click on the new created profile

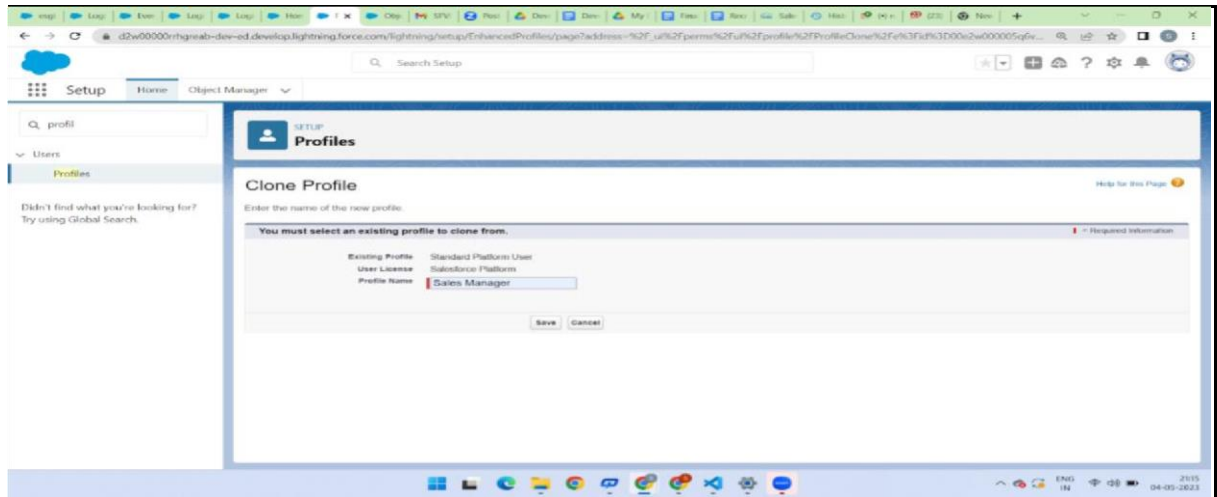


4. While still on the profile page, then click Edit.



5. For the sales manager profile give the following access

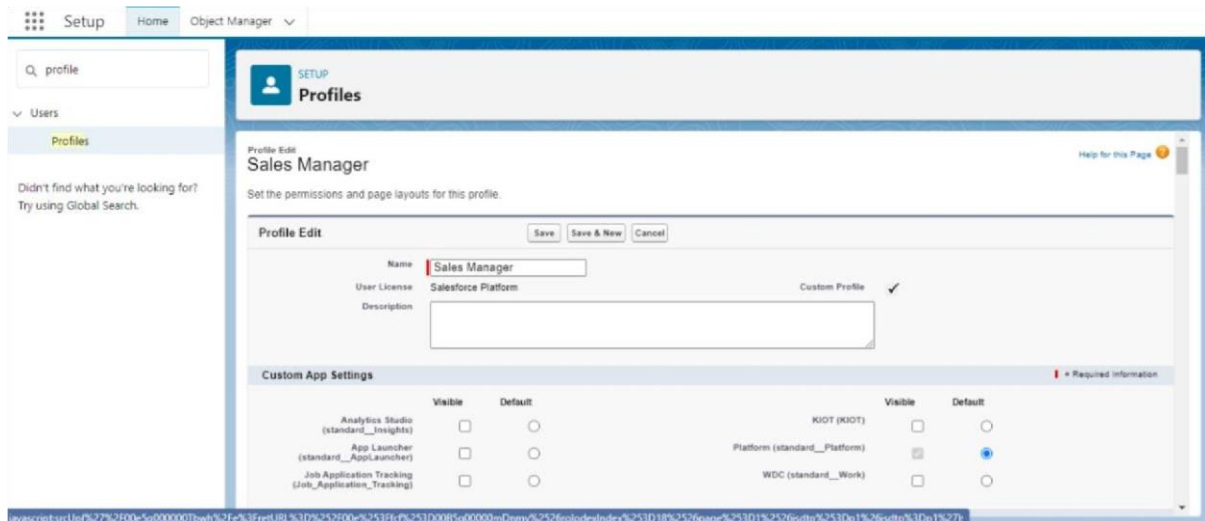




6. Similarly clone the standard platform profile and give the name as Sales Executive And give the same access to the as of sales manager.
7. Again clone the standard User profile and this time give all access for the objects, tabs and field And give the profile name as Delivery Person

2)Create A Custom Profile-2

- 1.Create a profile with the profile name as “Sales Manager”.
- 2.From setup, enter profiles in Quick Find box
- 3.Select profiles (Standard user).
- 4.Click clone.

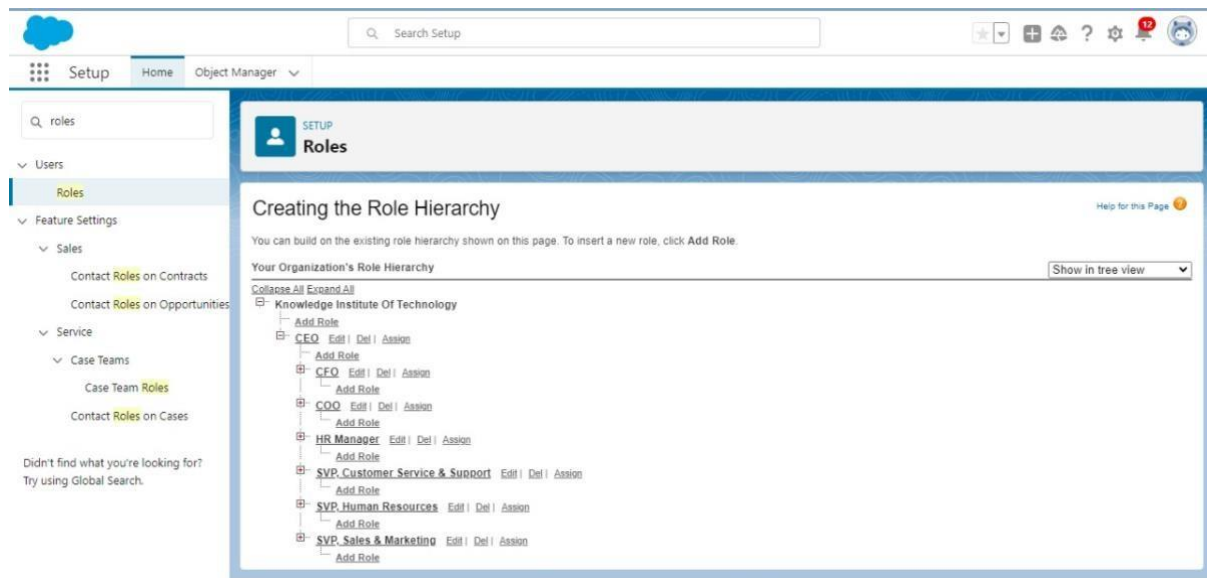


Role

In Salesforce, roles are used to determine which users have access to certain data and functions within the system. They are also used to define the reporting hierarchy within an organization. Users with higher roles have greater access to data and more control over the system

1)Creation of Role

- 1.From the Quick find box search for the role and click on the roles option
- 2.select the set-up roles option
- 3.Below the CEO click on add role and enter the label name as a” HR Manager” and role name will be Automatically populated and click on save.



User

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

1)To Create A User

- 1.From Setup, enter Users in the Quick Find box, then select Users.
- 2.Click New User.
- 3.Enter First name as HR and last name as Manager.
- 4.Enter the user's name and email address and a unique username in the form of an email address. By default, the username is the same as the email address.
- 5.Then create a new role HR Manager.
- 6.Select user License as Standard Platform User.

7. Select profile (Recruiter).

The screenshot shows the Salesforce Setup interface. On the left, the 'Users' section is selected in the navigation menu. The main content area displays the 'User Edit' form for a user named 'HR Manager'. The form includes fields for 'General Information' and 'User License'. The 'Role' is set to 'HR Manager', 'User License' is 'Salesforce Platform', and 'Profile' is 'Recruiter'. The 'Active' checkbox is checked. The 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', and 'WDC User' checkboxes are unchecked. The 'Save' button is visible at the top of the form.

8. Click save

2) To Create A User

1. From Setup, enter Users in the Quick Find box, then select Users.

2. Click New User.

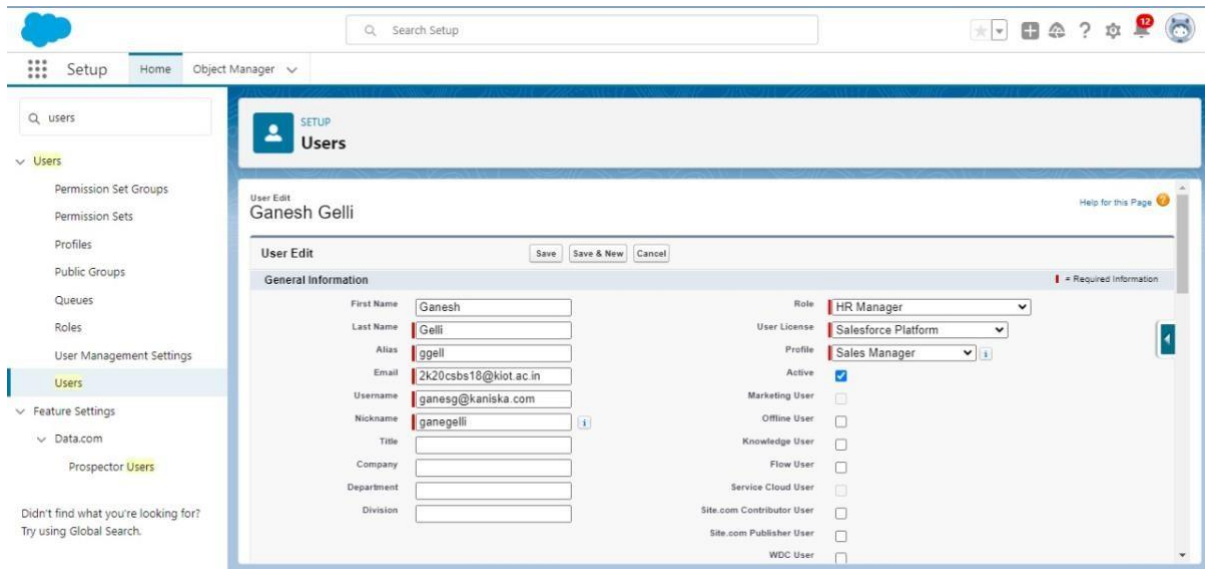
3. Enter First name as Ganesh and last name as Gili.

4. Enter the user's name and email address and a unique username in the form of an email address. By default, the username is the same as the email address.

5. Then create a new role HR Manager.

6. Select user License as Standard Platform User.

7. Select profile (Sales Manager).



8. Click save

Sharing Rules

Sharing rules help users to share records based on conditions. It is basically created for objects whose organization-wide defaults (OWD) are set to public read-only or private because sharing rules can only extend the access and not restrict it.

Types of sharing rules,

1. Owner-based Sharing Rules
2. Criteria-based Sharing Rules

1) Create A Sharing Rule

1. Go to Sharing Settings, which can be found under the Quick Find section.
2. Scroll down and find the candidate object where a sharing rule needs to be added, and then click on New to create a new sharing rule.
3. Add the label of the sharing rule you want to make.

4. Select your rule type based on the criteria.
5. Select the field can join immediately check field from the candidate object.
6. Select the State as equal and value is Rajasthan.
7. And in selecting the users to share with the section select roles and in that select Hr Manager.
8. And in the section of select the level of access for the users give the access Read/Write.
9. And save the rule.

The screenshot shows the Salesforce 'Sharing Settings' configuration page. The left sidebar contains navigation links for 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Sharing Settings' and includes a note: 'Note: "Roles and subordinates" includes all users in a role, and the roles below that role. You can use sharing rules only to grant wider access to data, not to restrict access.' The configuration form includes fields for 'Label' (Candidate), 'Rule Name' (Candidate), and 'Description'. Below this is 'Step 1: Select your rule type' with a table of criteria. The table has columns for 'Criteria', 'Field', 'Operator', 'Value', and 'AND/OR'. The first row shows 'State' as the field, 'equals' as the operator, and 'Rajasthan' as the value. Below the table are 'Additional Options' including 'Include records owned by users who can't have an assigned role' (checked), 'Share with' (Role: HR Manager), 'Access Level' (Read/Write), and 'Created By' (Kanjana Padmanaban). The page also shows 'Modified By' (Kanjana Padmanaban) and a timestamp (18/10/2023, 7:13 pm). At the bottom are 'Save' and 'Cancel' buttons.

| Criteria | Field | Operator | Value | AND/OR |
|----------|----------|----------|-----------|--------|
| | State | equals | Rajasthan | AND |
| | --None-- | --None-- | | AND |
| | --None-- | --None-- | | AND |
| | --None-- | --None-- | | AND |
| | --None-- | --None-- | | AND |

2)Activity 2

Create a Sharing Rule to Share the records of Job Application to Hr Manager with the Access of Read/Write.

Create A Sharing Rule

1. Go to Sharing Settings, which can be found under the Quick Find section.
2. Scroll down and find the Job Application object where a sharing rule needs to be added, and then click on New to create a new sharing rule.
3. Add the label of the sharing rule you want to make.

4. Select your rule type based on the criteria.

5. Select the field can join immediately check field from the Job Application object.

6. Job application number contains some number.

7. And in selecting the users to share with the section select roles and in that select Hr Manager.

8. And in the section of select the level of access for the users give the access Read/Write. 9. And save the rule.

The screenshot shows the Salesforce Setup interface for the 'Sharing Settings' section. The left sidebar contains navigation links: 'Setup', 'Home', 'Object Manager', 'Security', 'Guest User', 'Sharing Rule Access Report', and 'Sharing Settings'. The main content area is titled 'Job Application Sharing Rule'. It includes a 'Label' field with 'Job Application', a 'Rule Name' field with 'Job_Application', and a 'Description' field. Below this is a section titled 'Step 1: Select your rule type' with a 'Criteria' table. The table has columns for 'Field', 'Operator', 'Value', and a logical connector. The first row shows 'Job Application Number' with the operator 'contains' and the value 'Some number'. The subsequent rows show 'None' for the field and operator, and empty value fields. Below the table is an 'Additional Options' section with a checkbox for 'Include records owned by users who don't have an assigned role'. The 'Share with' field is set to 'Role: Hr Manager', and the 'Access Level' is set to 'Read/Write'. The 'Created By' field shows 'Kanjika Padmanaban' and the 'Modified By' field shows 'Kanjika Padmanaban' with a timestamp of '18/10/2023, 7:30 pm'.

| Criteria | Field | Operator | Value | |
|----------|------------------------|----------|-------------|-----|
| | Job Application Number | contains | Some number | AND |
| | None | None | | AND |
| | None | None | | AND |
| | None | None | | AND |
| | None | None | | AND |

Additional Options
☐ Include records owned by users who don't have an assigned role

Share with: Role: Hr Manager
Access Level: Read/Write
Created By: Kanjika Padmanaban 18/10/2023, 7:30 pm
Modified By: Kanjika Padmanaban 18/10/2023, 7:30 pm

Profile

- A profile is a group/collection of settings and permissions that define what a user can do in salesforce.
- Profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges.
- You can define profiles by the user's job function. For example System Administrator, Developer, Sales Representative.

Types of profiles in salesforce Standard profiles:

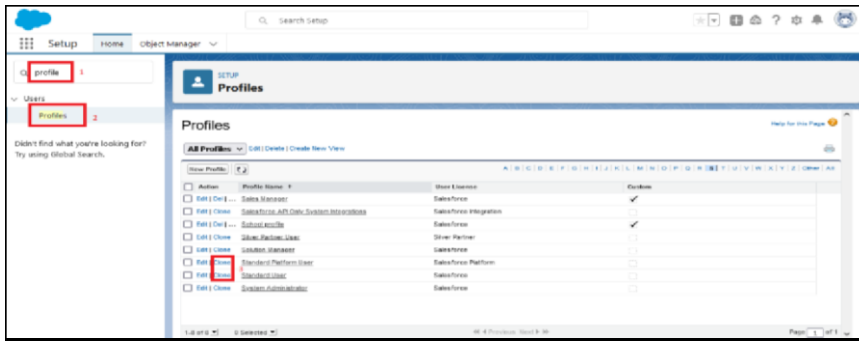
- By default salesforce provide below standard profiles
- We cannot deleted standard ones
- Each of these standard one includes a default set of permissions for all of the standard objects available on the platform

2. Custom Profiles:

- 1. Custom ones defined by us.
- 2. They can be deleted if there are no users assigned with that particular one

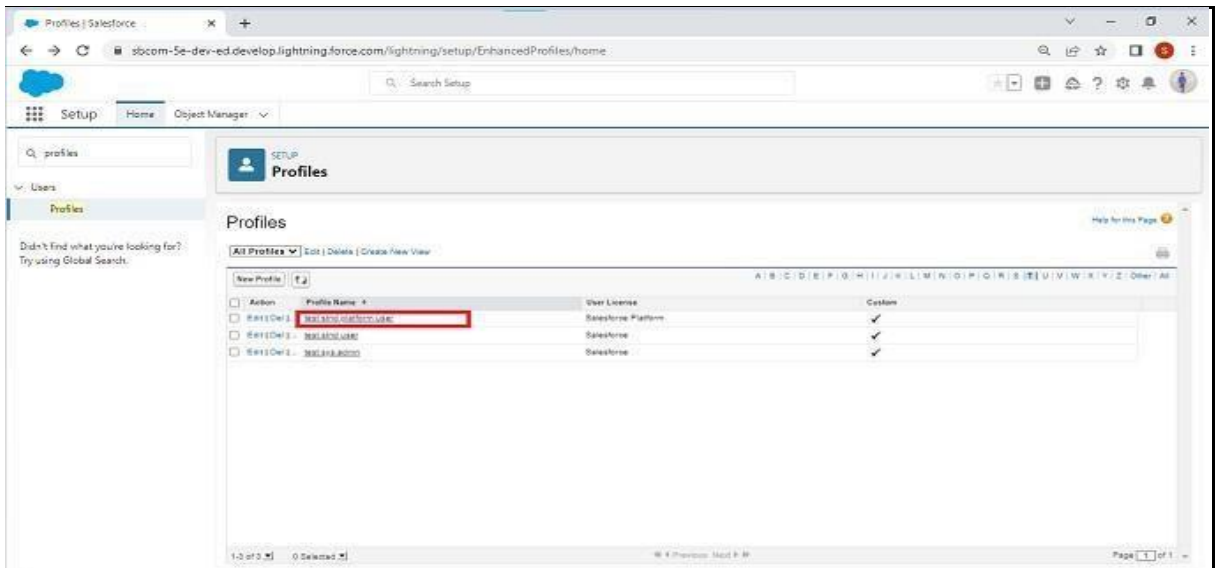
1)Create A Custom Profile

3. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (standard platform user is pref) and clone that profile

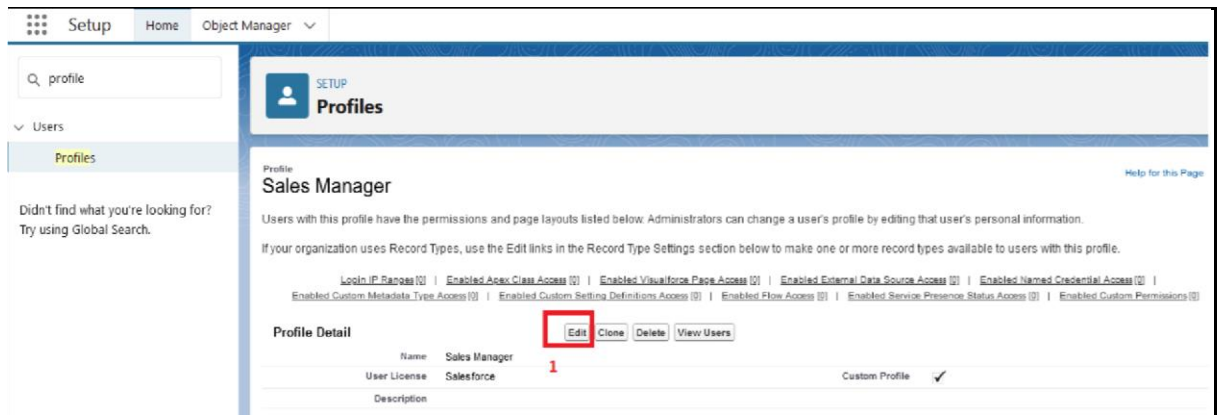


4. Enter a Profile Name(Sales Manager) And click on Save

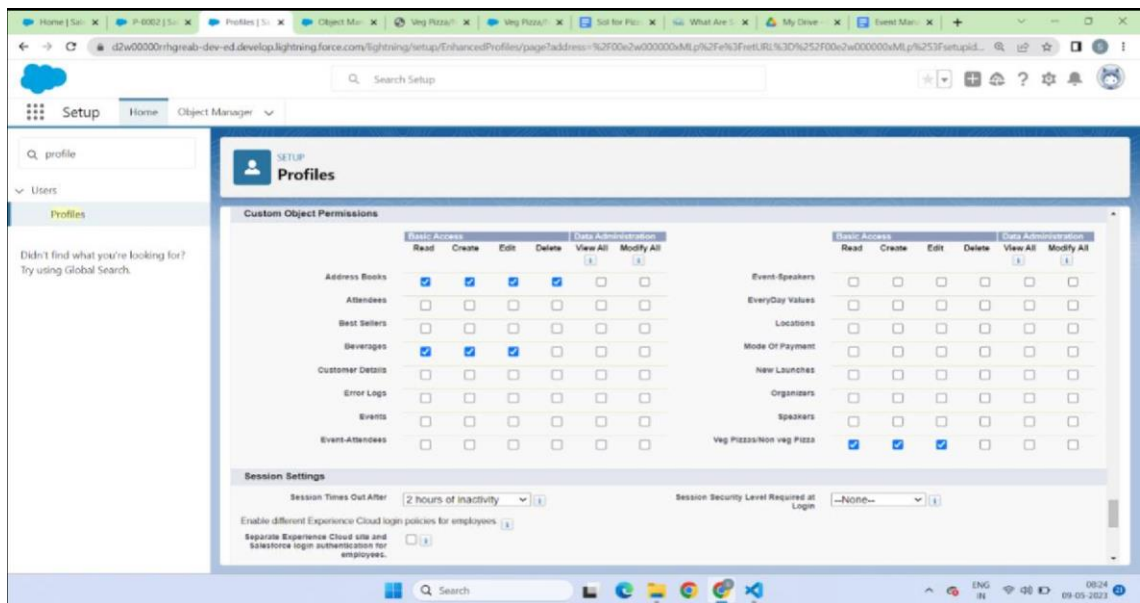
3. Click on the new created profile

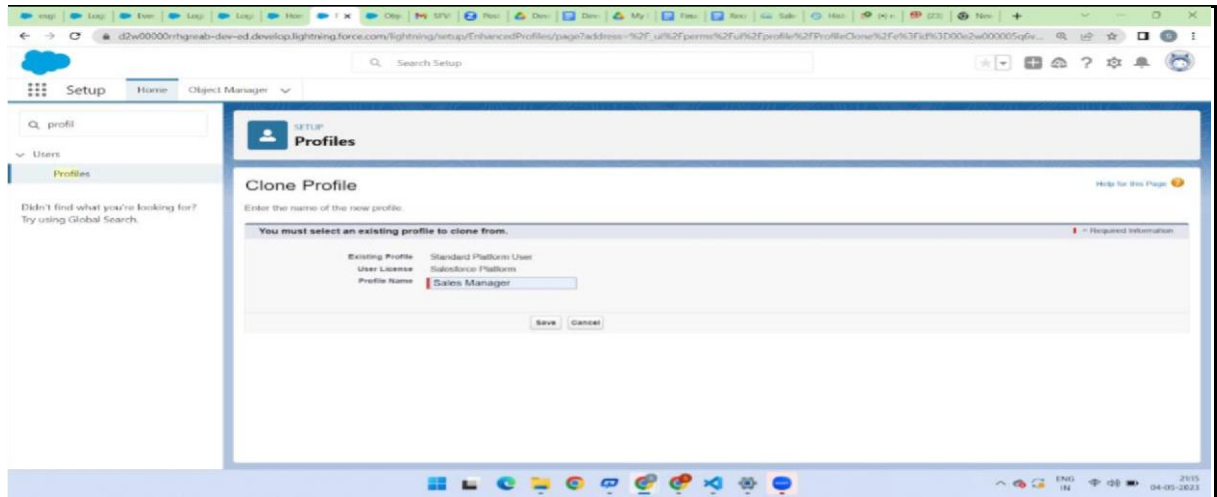


4. While still on the profile page, then click Edit.



5. For the sales manager profile give the following access

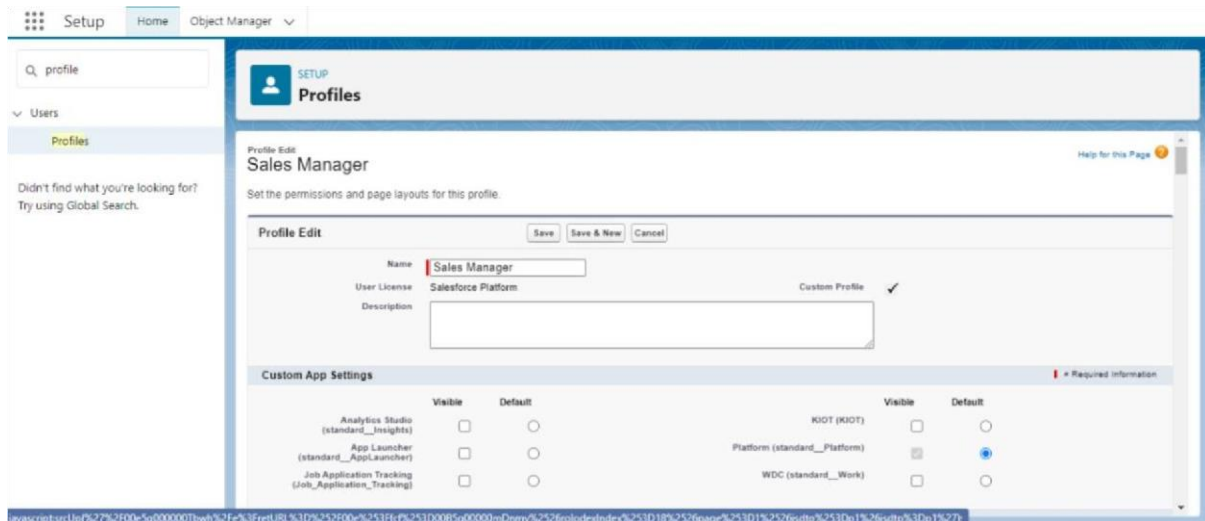




8. Similarly clone the standard platform profile and give the name as Sales Executive And give the same access to the as of sales manager.
9. Again clone the standard User profile and this time give all access for the objects, tabs and field And give the profile name as Delivery Person

2)Create A Custom Profile-2

- 1.Create a profile with the profile name as “Sales Manager”.
- 2.From setup, enter profiles in Quick Find box
- 3.Select profiles (Standard user).
- 4.Click clone.

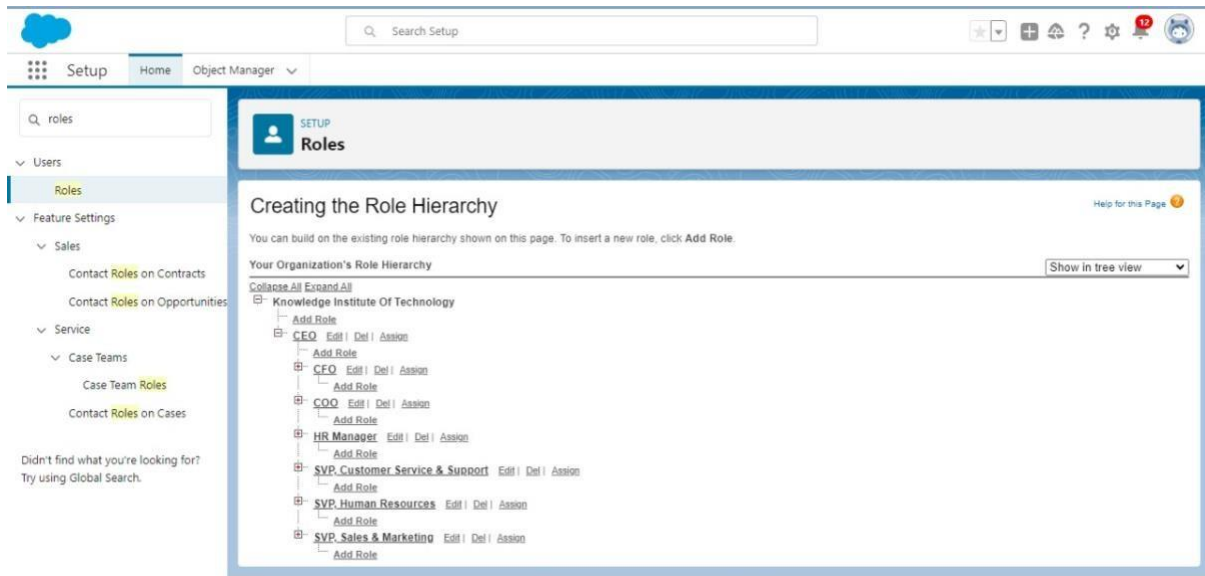


Role

In Salesforce, roles are used to determine which users have access to certain data and functions within the system. They are also used to define the reporting hierarchy within an organization. Users with higher roles have greater access to data and more control over the system

1)Creation of Role

- 1.From the Quick find box search for the role and click on the roles option
- 2.select the set-up roles option
- 3.Below the CEO click on add role and enter the label name as a” HR Manager” and role name will be Automatically populated and click on save.



User

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

1)To Create A User

- 1.From Setup, enter Users in the Quick Find box, then select Users.
- 2.Click New User.
- 3.Enter First name as HR and last name as Manager.
- 4.Enter the user's name and email address and a unique username in the form of an email address. By default, the username is the same as the email address.
- 5.Then create a new role HR Manager.
- 6.Select user License as Standard Platform User.

7. Select profile (Recruiter).

The screenshot shows the Salesforce Setup interface. On the left, a sidebar lists navigation options: Setup, Home, Object Manager, Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Feature Settings, Data.com, and Prospectors. The 'Users' section is selected. The main content area shows the 'User Edit' form for 'HR Manager'. The form has tabs for 'General Information', 'Permissions', and 'Advanced'. The 'General Information' tab is active, showing fields for First Name (HR), Last Name (Manager), Email (2k20csbs18@klot.ac.in), Username (2k20csbs18@klot.ac.in), Nickname (hrmana), Title, Company, Department, and Division. On the right, there are dropdown menus for Role (HR Manager), User License (Salesforce Platform), and Profile (Recruiter). Below these are checkboxes for Active (checked), Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, and WDC User. A 'Save' button is at the top right of the form.

8. Click save

2) To Create A User

1. From Setup, enter Users in the Quick Find box, then select Users.

2. Click New User.

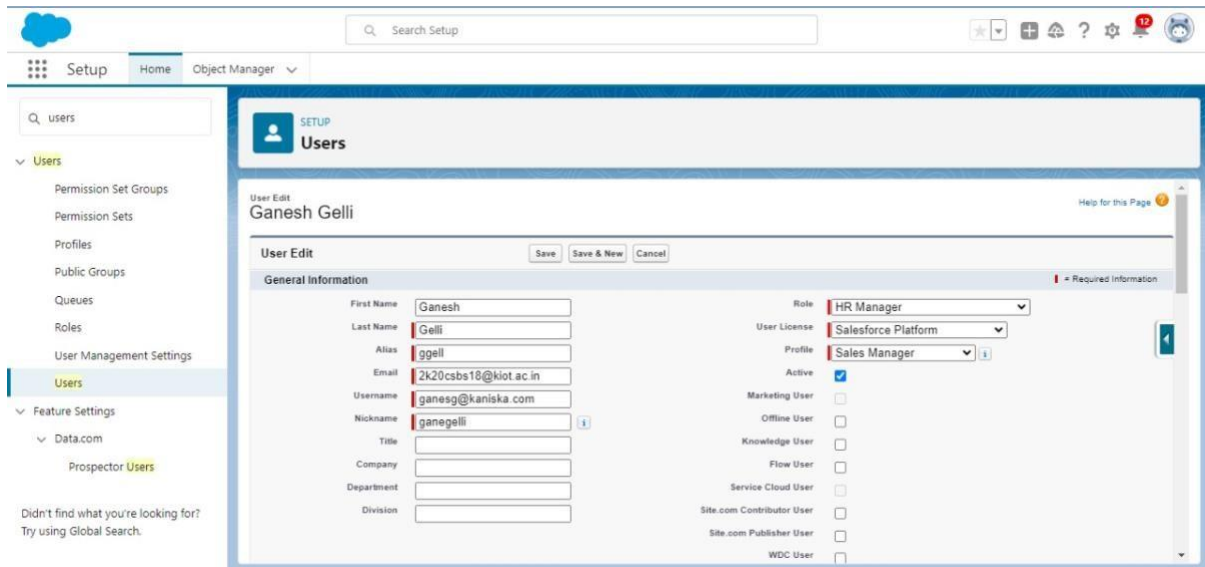
3. Enter First name as Ganesh and last name as Gili.

4. Enter the user's name and email address and a unique username in the form of an email address. By default, the username is the same as the email address.

5. Then create a new role HR Manager.

6. Select user License as Standard Platform User.

7. Select profile (Sales Manager).



8. Click save

Sharing Rules

Sharing rules help users to share records based on conditions. It is basically created for objects whose organization-wide defaults (OWD) are set to public read-only or private because sharing rules can only extend the access and not restrict it.

Types of sharing rules,

1. Owner-based Sharing Rules

2. Criteria-based Sharing Rules

1) Create A Sharing Rule

1. Go to Sharing Settings, which can be found under the Quick Find section.

2. Scroll down and find the candidate object where a sharing rule needs to be added, and then click on New to create a new sharing rule.

3. Add the label of the sharing rule you want to make.

4. Select your rule type based on the criteria.
5. Select the field can join immediately check field from the candidate object.
6. Select the State as equal and value is Rajasthan.
7. And in selecting the users to share with the section select roles and in that select Hr Manager.
8. And in the section of select the level of access for the users give the access Read/Write.
9. And save the rule.

Search Setup

Setup Home Object Manager

Q shar

Security

Guest User Sharing Rule Access Report

Sharing Settings

Didn't find what you're looking for? Try using Global Search.

SETUP Sharing Settings

Note: "Roles and subordinates" includes all users in a role, and the roles below that role.
You can use sharing rules only to grant wider access to data, not to restrict access.

Label: Candidate

Rule Name: Candidate

Description:

Step 1: Select your rule type

| Criteria | Field | Operator | Value | |
|----------|----------|----------|-----------|-----|
| | State | equals | Rajasthan | AND |
| | --None-- | --None-- | | AND |
| | --None-- | --None-- | | AND |
| | --None-- | --None-- | | AND |
| | --None-- | --None-- | | AND |

Additional Options

☒ Include records owned by users who can't have an assigned role

Share With

Role: Hr Manager

Access Level: Read/Write

Created By: Kanaka Padmanaban 18/10/2023, 7:13 pm

Modified By: Kanaka Padmanaban 18/10/2023, 7:13 pm

Save Cancel

2)Activity 2

Create a Sharing Rule to Share the records of Job Application to Hr Manager with the Access of Read/Write.

Create A Sharing Rule

1. Go to Sharing Settings, which can be found under the Quick Find section.
2. Scroll down and find the Job Application object where a sharing rule needs to be added, and then click on New to create a new sharing rule.
3. Add the label of the sharing rule you want to make.

4. Select your rule type based on the criteria.

5. Select the field can join immediately check field from the Job Application object.

6. Job application number contains some number.

7. And in selecting the users to share with the section select roles and in that select Hr Manager.

8. And in the section of select the level of access for the users give the access Read/Write. 9. And save the rule.

The screenshot shows the Salesforce Setup interface for the 'Sharing Settings' section. The left sidebar contains navigation links: 'Setup', 'Home', 'Object Manager', 'Security', 'Guest User', 'Sharing Rule Access Report', and 'Sharing Settings'. The main content area is titled 'Job Application Sharing Rule'. It includes a search bar with 'Q. shar' and a 'Security' dropdown. Below the search bar, there's a 'Guest User' link and a 'Sharing Rule Access Report' link. The 'Sharing Settings' section is active, showing a 'Job Application Sharing Rule' configuration. The rule is named 'Job_Application' and has a description. The 'Step 1: Select your rule type' section shows a table with criteria: 'Job Application Number' contains 'Some number'. The 'Additional Options' section includes 'Include records owned by users who don't have an assigned role' (checked), 'Share with: Role: Hr Manager', and 'Access Level: Read/Write'. The 'Created By' field shows 'Sankita Padmanaban' and the 'Modified By' field shows 'Sankita Padmanaban' on 18/10/2023 at 7:30 pm.

Setup Home Object Manager

Q. shar

Security

Guest User Sharing Rule Access Report

Sharing Settings

Didn't find what you're looking for? Try using Global Search.

SETUP Sharing Settings

Job Application Sharing Rule

Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.

Note: "Roles and subordinates" includes all users in a role, and the roles below that role.

You can use sharing rules only to grant wider access to data, not to restrict access.

Label: Job Application

Rule Name: Job_Application

Description:

Step 1: Select your rule type

Criteria

| Field | Operator | Value | |
|------------------------|----------|-------------|-----|
| Job Application Number | contains | Some number | AND |
| --None-- | --None-- | | AND |
| --None-- | --None-- | | AND |
| --None-- | --None-- | | AND |
| --None-- | --None-- | | AND |

Add Filter Logic...

Additional Options

☒ Include records owned by users who don't have an assigned role

Share with: Role: Hr Manager

Access Level: Read/Write

Created By: Sankita Padmanaban 18/10/2023, 7:30 pm

Modified By: Sankita Padmanaban 18/10/2023, 7:30 pm

v