Profile

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- 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:

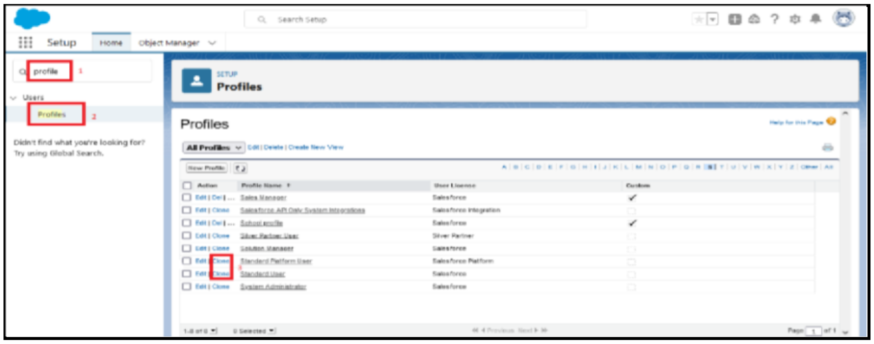
- By default salesforce provide below standard profiles
- We cannot deleted standard ones
- Each of these standard one includes a default set of permissions for all of the standard objects available on the platform

2. Custom Profiles:

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

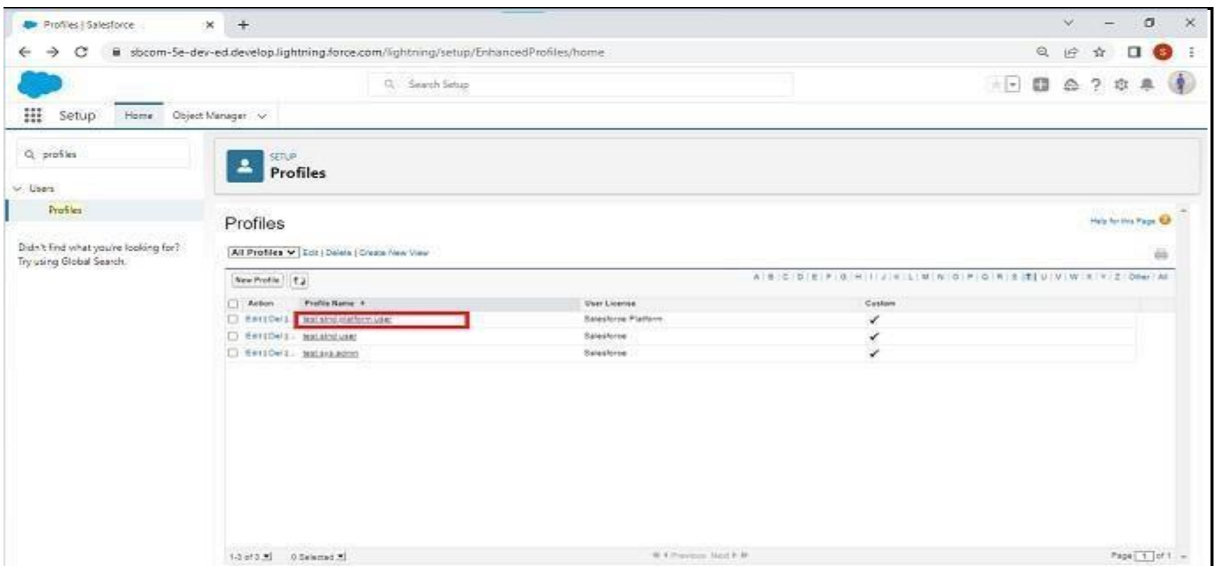
1)Create A Custom Profile

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

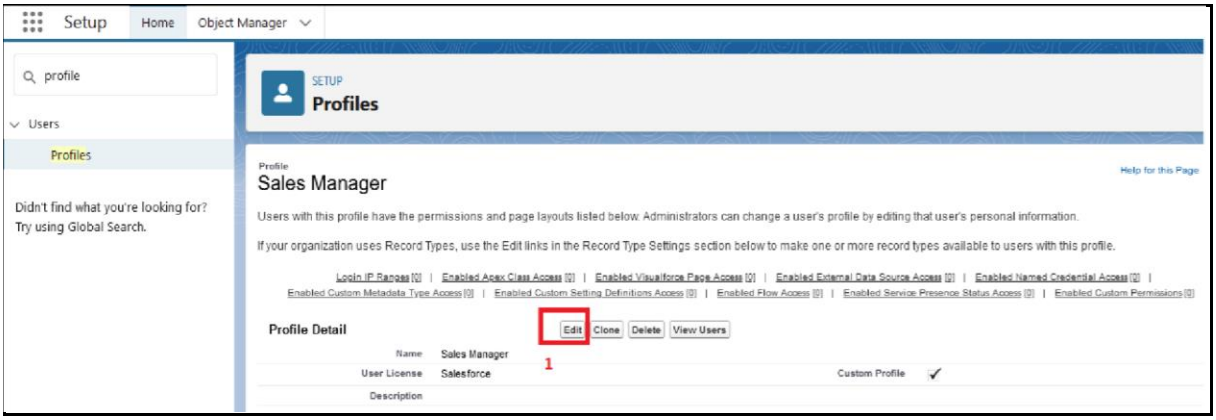


2. Enter a Profile Name(Sales Manager) And click on Save

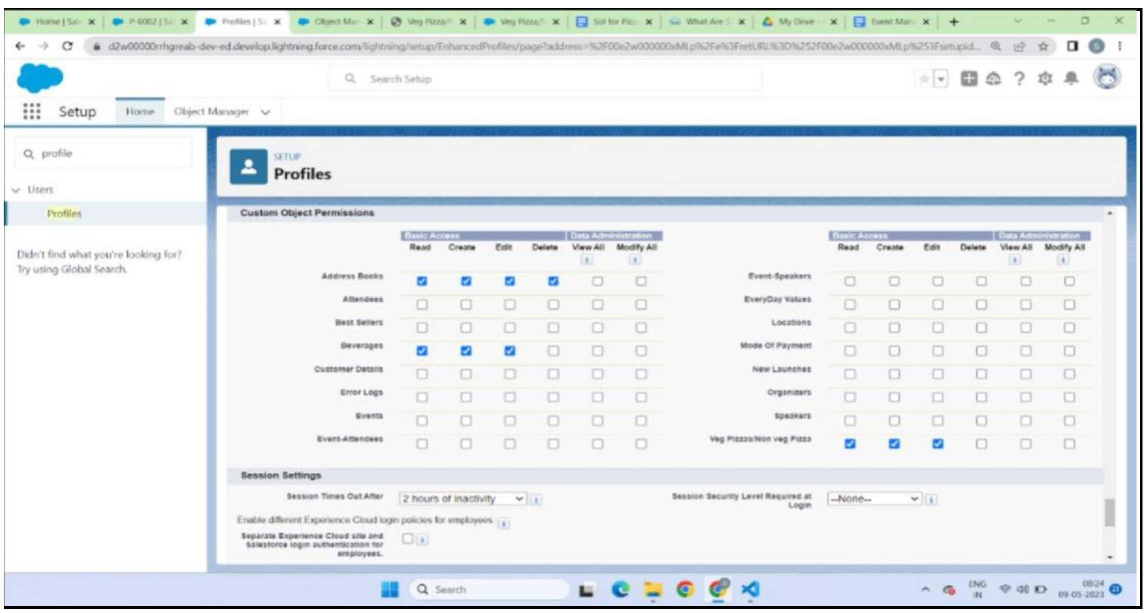
3. Click on the new created profile

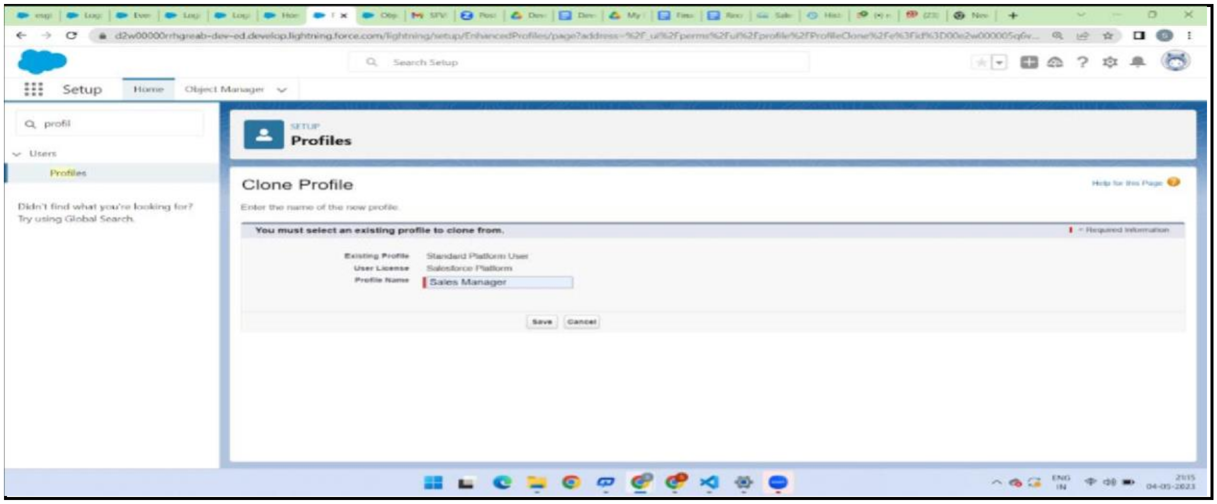


4. While still on the profile page, then click Edit.



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

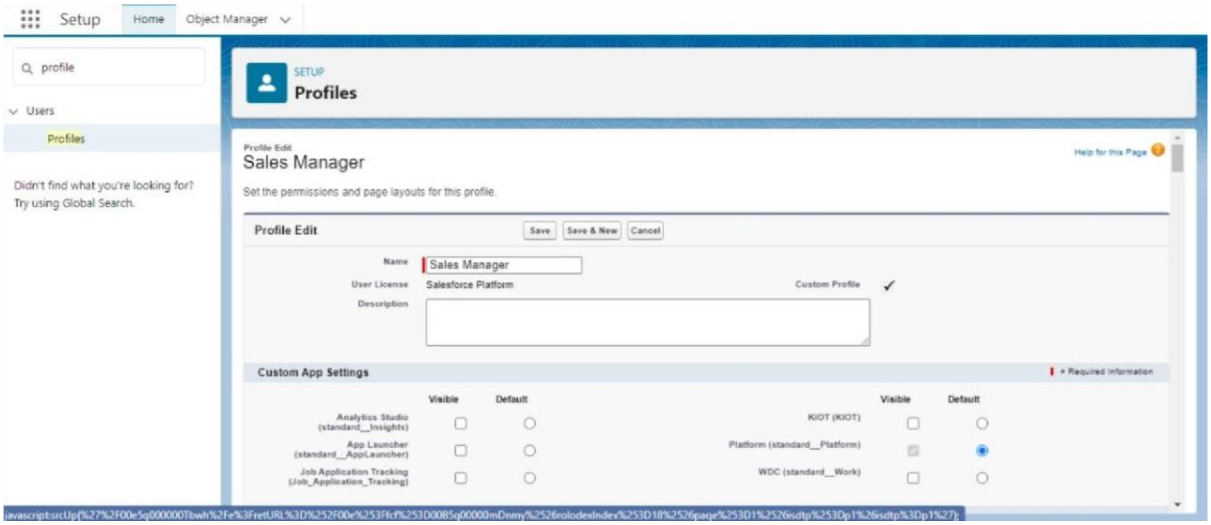
2)Create A Custom Profile-2

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

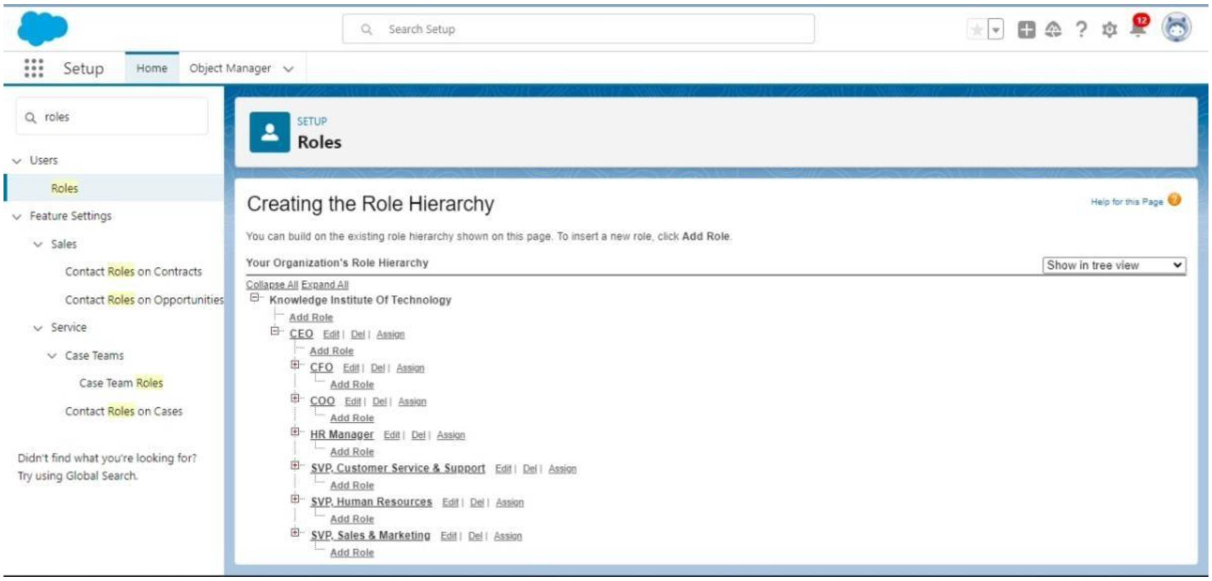
In Salesforce, roles are used to determine which users have access to certain data and functions within the system. They are also used to define the reporting hierarchy within an organization. Users with higher roles have greater access to data and more control over the system **1)Creation of Role**

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.

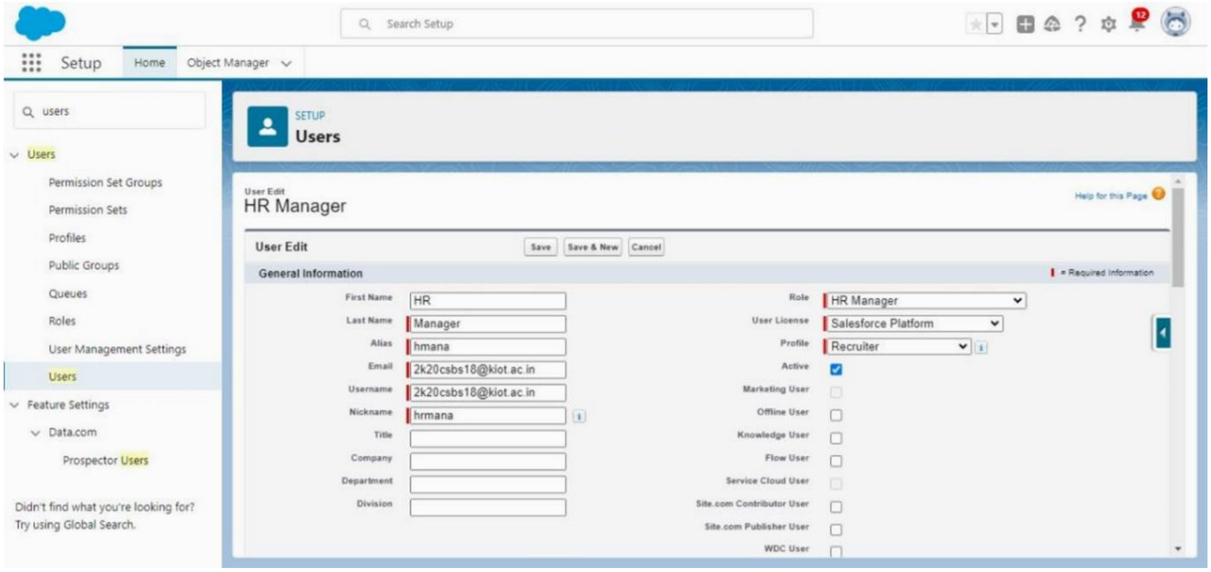
3.Enter First name as HR and last name as Manager.

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).



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.

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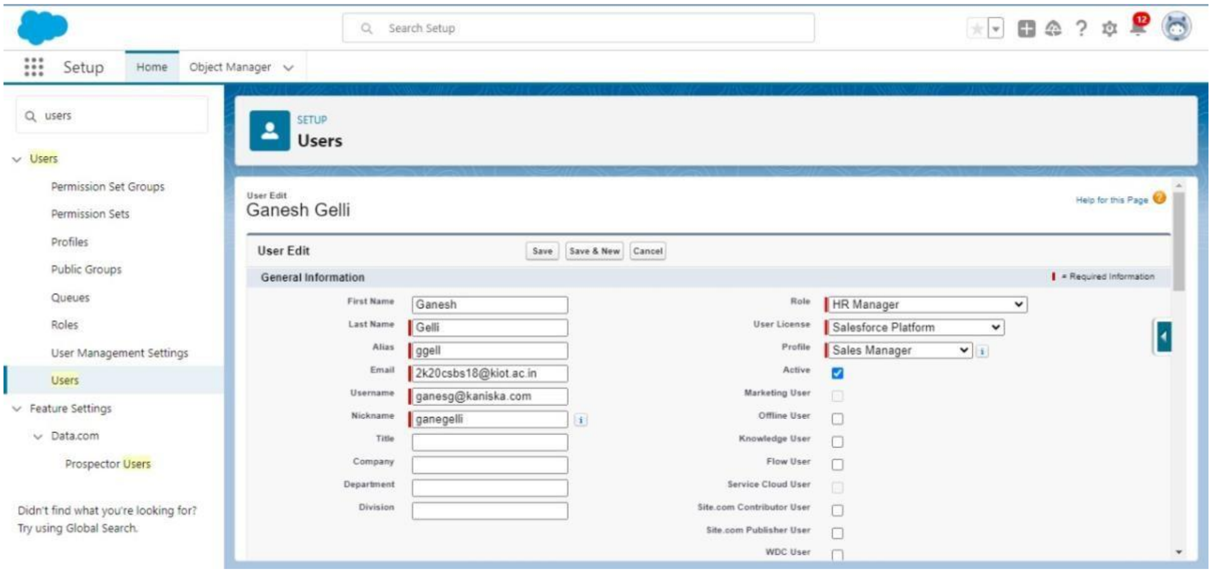


8.Click save

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.

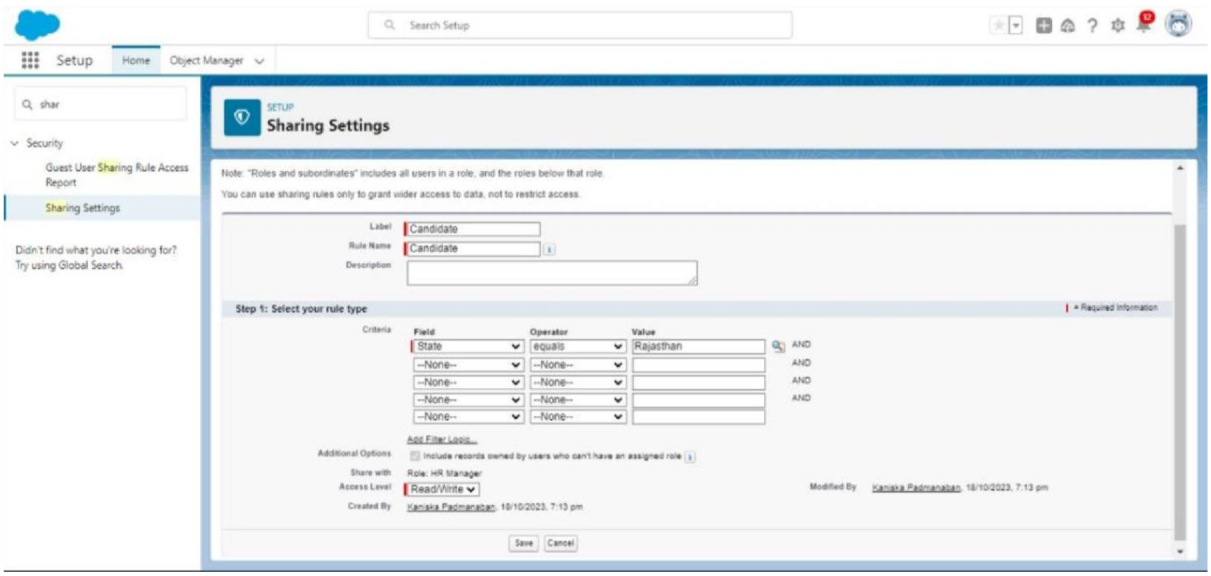
3.Add the label of the sharing rule you want to make.

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.



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.

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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.

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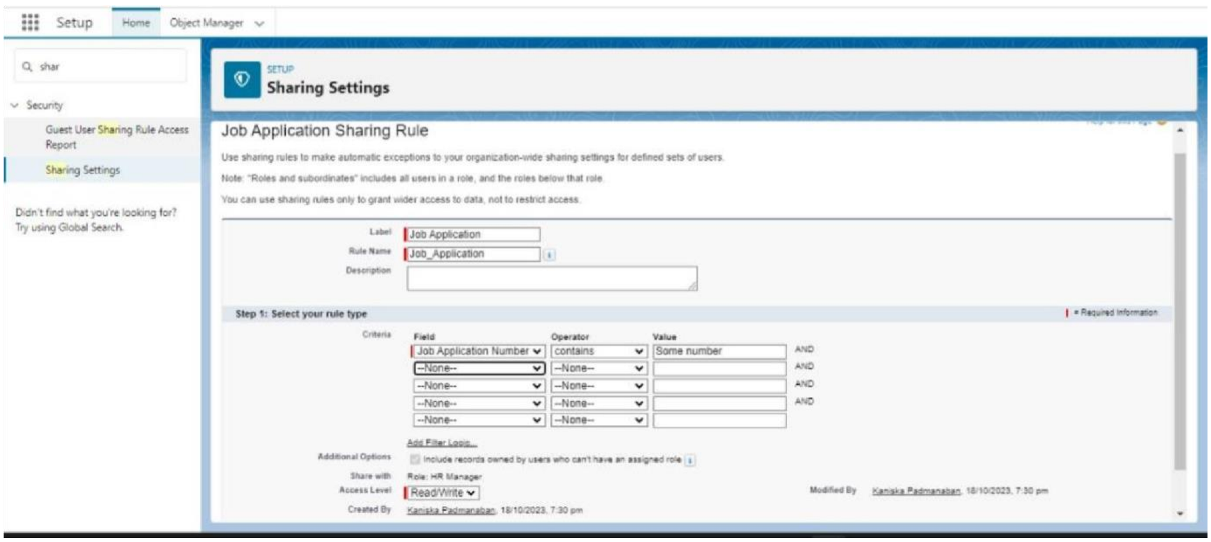

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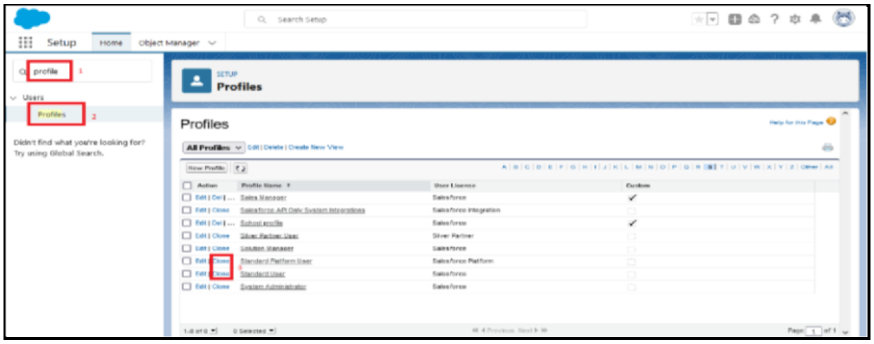

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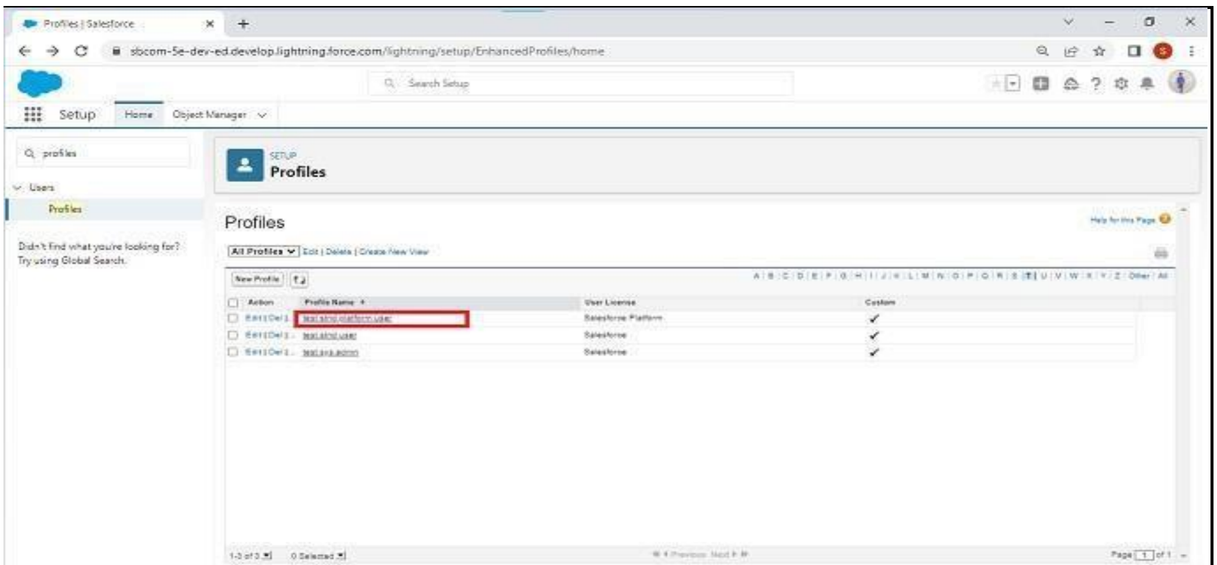

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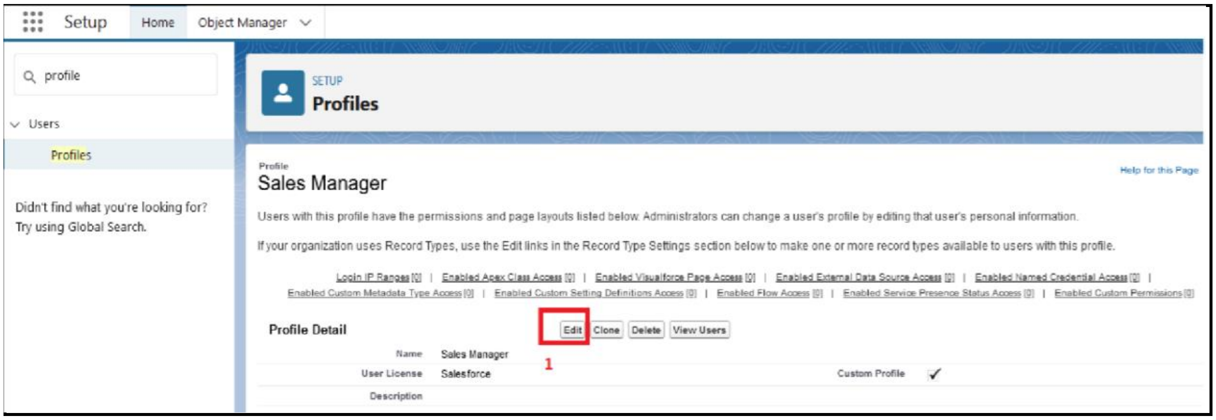

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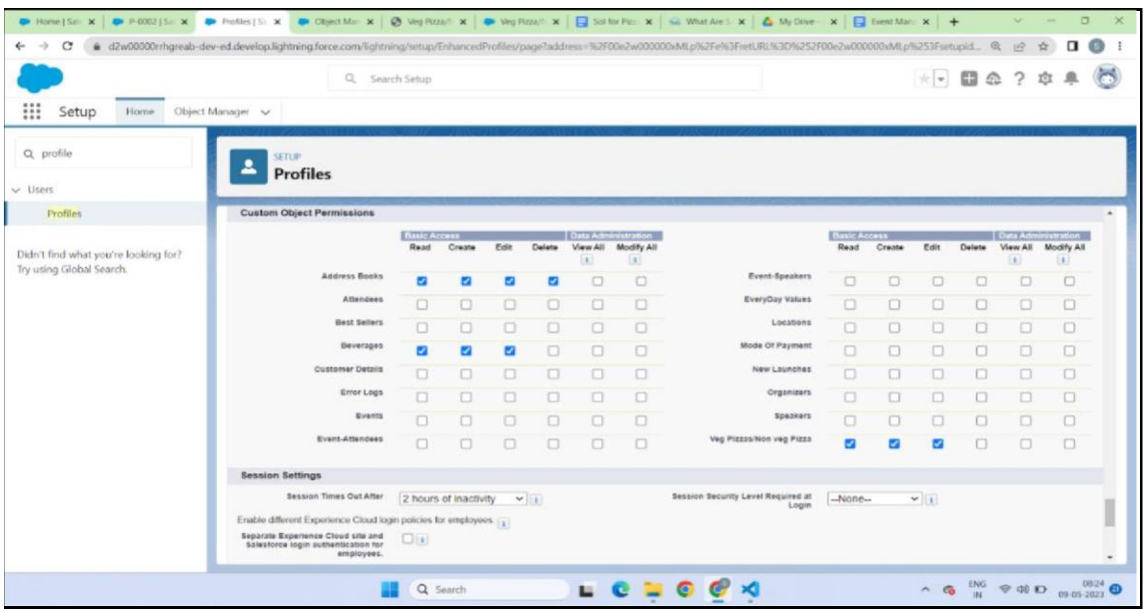

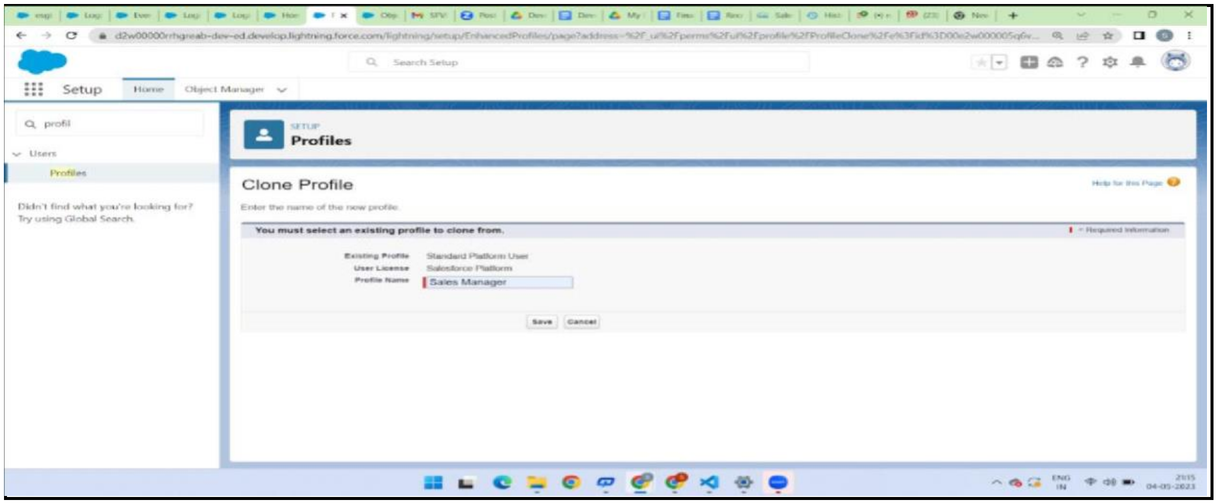

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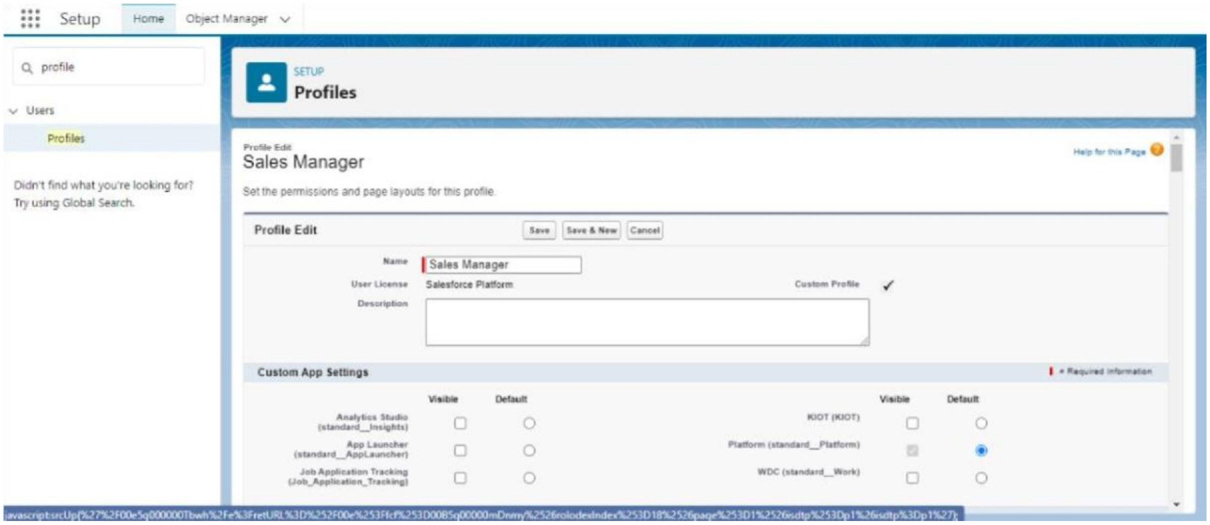

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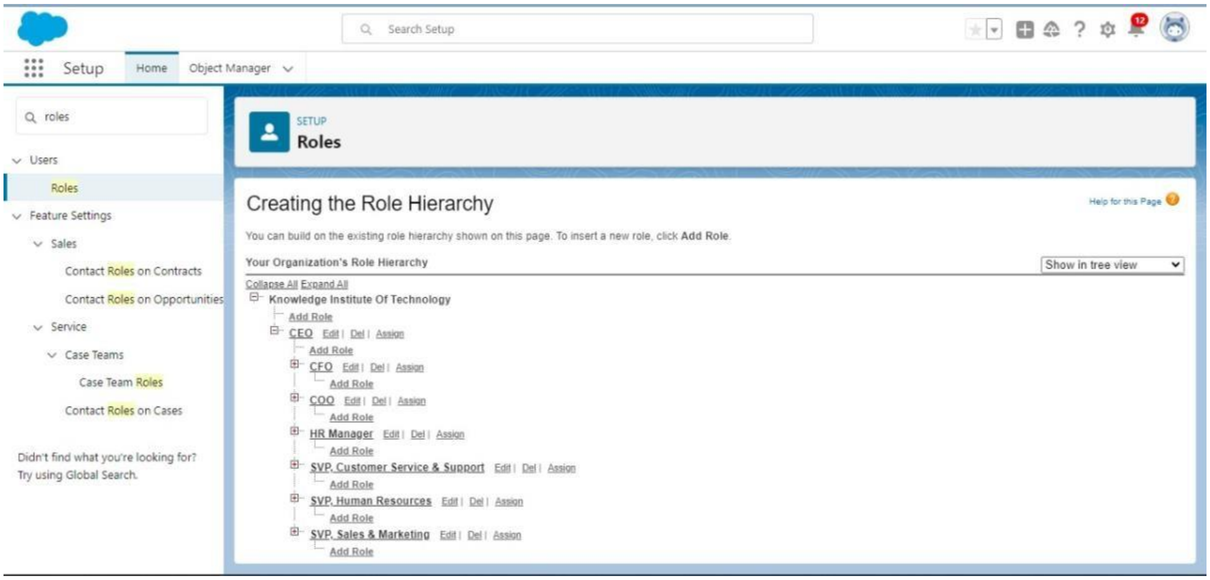

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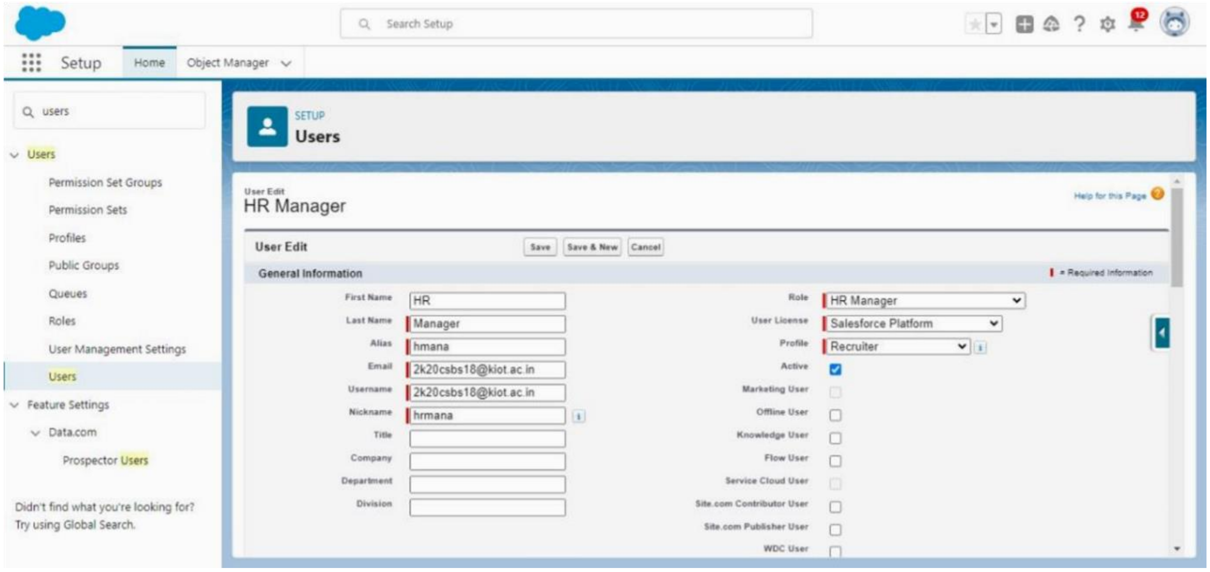

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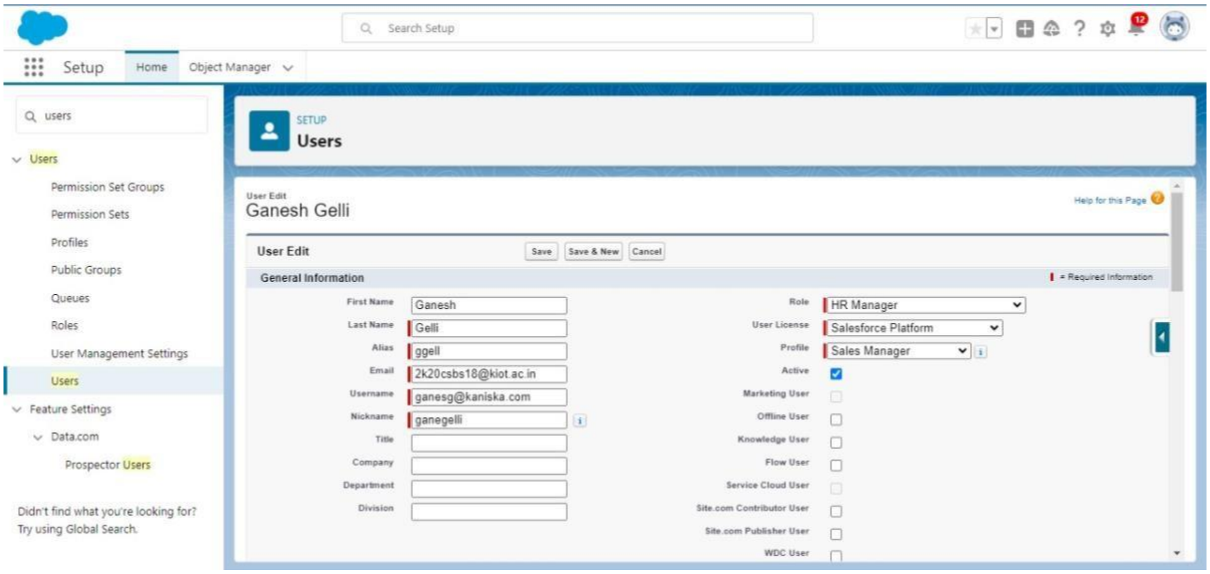

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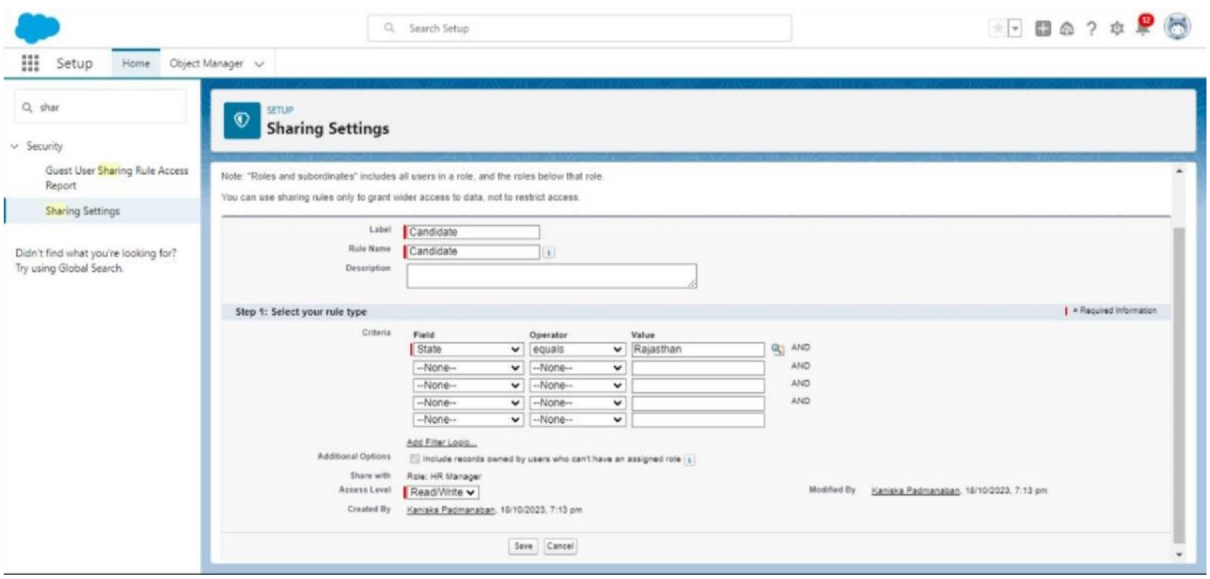

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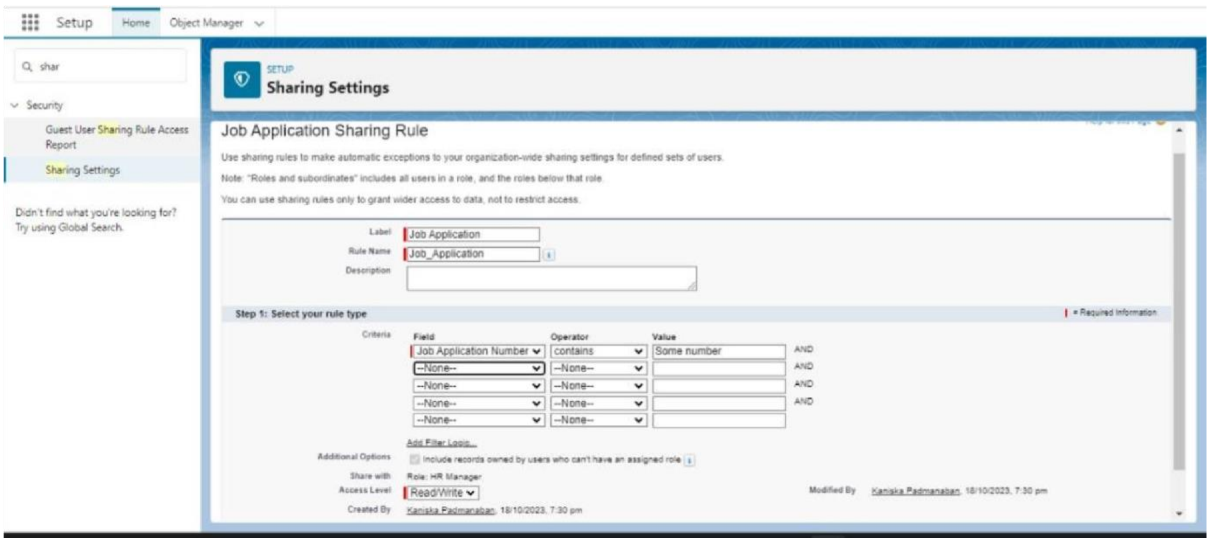

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