

CRM Practical 5

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Batch. E1

Roll no. 09

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- Object - Level Security: It prevents a user or group of users from creating, viewing, editing, or deleting any records of an object by setting permissions on that object.
- Field - Level Security:
 - Field-level security in salesforce controls whether a user can see and edit the value for a particular field on an object's record, unlike page layouts which only control the visibility of the field on detail and edit pages of an object. It secures the visibility of fields in any part of the app including related lists, list views, reports, and search results.
 - It restricts a user to access the field anywhere in the org such as in the formula field, but if we hide it from the page layout then the user can use the field value of that field. It will only be hidden in the page layout.
 - Field-level security can be applied to multiple fields on a single profile or permission set and can also be applied to a single field on all profiles.
- Both the security levels can be achieved through:
 - Profile
 - Permission Set

Q1. Regional Managers should Access the Hotel and Guest Objects. But Agent users should NOT have access to them.

Ans. Step1: Create “Regional Manager” Profile by cloning Standard User.

Step2: Create “Agent” Profile by the same.

The screenshot shows the Salesforce Setup interface under the Profiles section. A modal window titled 'Profiles' is open, displaying a list of existing profiles. The 'User License' column shows 'Salesforce' for most profiles, except for 'Analytics Cloud Integration User', 'Analytics Cloud Security User', 'Authenticated Website', 'Authenticator Website', 'Chatter External User', 'Chatter Free User', 'Chatter Moderator User', and 'Contract Manager', which have 'Analytics Cloud Integration User' listed. The 'Edit | Clone' option is available for all profiles. On the right side of the modal, there are settings for 'DISPLAY DENSITY' (set to 'Comfy'), 'OPTIONS' (with 'Switch to Salesforce Classic' and 'Add Username' buttons), and a user info card for 'Harsha Hargunani'. The main list shows 1-42 of 42 profiles, with '1 Selected'. The bottom of the screen shows the Windows taskbar with various pinned icons and the system tray indicating the date and time as 20-09-2023.

Step3: Make the App visible to the profile users.

The screenshot shows the Salesforce Setup interface under the Profiles section. A modal window titled 'Profiles' is open, displaying a list of profiles. In the 'VISIBLE APPS' section, the 'Hotel Booking App (Hotel_Booking_App)' checkbox is highlighted with a red circle. The rest of the checkboxes for other apps like 'All Tabs', 'Analytics Studio', etc., are also checked. The right side of the modal shows settings for 'USERNAMES' (with a dropdown for 'rammodi@regionalmanager.com'), 'DISPLAY DENSITY' (set to 'Comfy'), 'OPTIONS' (with 'Switch to Salesforce Classic' and 'Add Username' buttons), and a user info card for 'Harsha Hargunani'. The bottom of the screen shows the Windows taskbar with various pinned icons and the system tray indicating the date and time as 22-09-2023.

Step4: Under Tab Settings | Custom Tab Settings | Set Hotel - Tab Hidden

The screenshot shows the Salesforce Setup interface under the Profiles tab. In the 'Custom Tab Settings' section, there is a table with various objects like Addresses, Bookings, Cars, etc., each with a dropdown menu. The 'Hotels' row has a dropdown menu open, showing options: Default On, Tab Hidden (which is highlighted), Default Off, and Default On again. Other objects like Insurances, Payments, Pilots, Students Details, and Subjects also have dropdown menus below them.

Step5: Set Guest - Hidden Tab | Save.

Step6: Login as Ram Modi - Regional Manager and Krishna Modi - Agent to verify.

The screenshot shows the Salesforce Users page. It lists several users with their full names, email addresses, and roles. The user 'Modi, Krishna' is currently selected, indicated by a blue highlight around the row. The 'Edit' button for this user is also highlighted in blue.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Modi, Hari	harimod	harimodi@agent.com	<input type="checkbox"/>	Agent	
<input type="checkbox"/>	Modi, Krishna	krismodi	krishnamodi@agent.com	<input checked="" type="checkbox"/>	Agent	
<input type="checkbox"/>	User, Integration	integ	integration@00d5j00000c7udvea3.com	<input checked="" type="checkbox"/>		Analytics Cloud Integration User
<input type="checkbox"/>	User, Security	sec	insightssecurity@00d5j00000c7udvea3.com	<input checked="" type="checkbox"/>		Analytics Cloud Security User
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.00d5j00000c7udvea3.q8tusrtorfg@chatter.salesforce.com	<input checked="" type="checkbox"/>		Chatter Free User
<input type="checkbox"/>	Modi, Bunty	buntymod	buntymodi@customercare.com	<input type="checkbox"/>		Customer Care
<input type="checkbox"/>	Modi, Jai	jaimodi	jaimodi@regionalmanager.com	<input type="checkbox"/>		Regional Manager
<input type="checkbox"/>	Modi, Shree	shrimodi	shreemodi@regionalmanager.com	<input type="checkbox"/>		Regional Manager
<input type="checkbox"/>	Modi, Ram	rammodi	rammodi@regionalmanager.com	<input type="checkbox"/>		Regional Manager
<input type="checkbox"/>	Harshana, Harsha	HHarg	harsha@bts.com	<input checked="" type="checkbox"/>		System Administrator

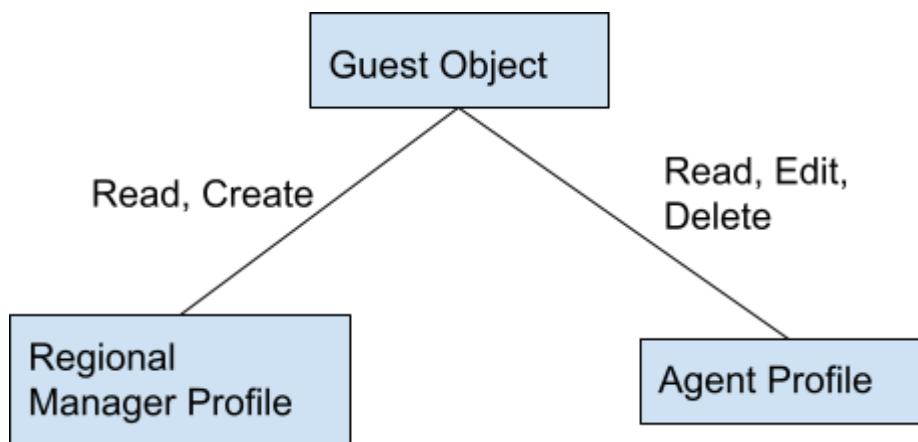
Results:

Hotel and Guest Objects are visible for Ram Modi, but not for Krishna Modi.

This screenshot shows the Salesforce Lightning interface for the Hotel Booking App. The user is logged in as 'Ram Modi'. The top navigation bar includes 'Recently Viewed', 'Guests', and 'Sales'. Below the bar, the 'Guests' tab is selected, indicated by a pink checkmark. The main content area displays a message: '0 items • Updated a few seconds ago' and 'Guest ID'. A note at the bottom says, 'You haven't viewed any Guests recently. Try switching list views.' On the right side, a sidebar shows the user's profile picture, name, and login information ('btscm-dev-ed.develop.my.salesforce.com'). It also includes settings for 'DISPLAY DENSITY' (set to 'Comfy') and 'OPTIONS' (with links to 'Switch to Salesforce Classic' and 'Add Username'). The status bar at the bottom shows the date and time as '20-09-2023 01:02 AM'.

This screenshot shows the Salesforce Lightning interface for the Hotel Booking App. The user is logged in as 'Krishna Modi'. The top navigation bar includes 'Dashboards', 'Reports', and 'Bookings'. Below the bar, the 'Dashboards' tab is selected, indicated by a pink checkmark. The main content area displays a message: 'Recent' and '0 items'. On the left, a sidebar lists 'DASHBOARDS' (Recent, Created by Me, Private Dashboards, All Dashboards) and 'FOLDERS' (All Folders, Created by Me, Shared with Me). A central message says, 'Recent dashboards appear here. Go to All Dashboards to see what's available.' with a link to 'View All Dashboards'. On the right side, a sidebar shows the user's profile picture, name, and login information ('btscm-dev-ed.develop.my.salesforce.com'). It also includes settings for 'DISPLAY DENSITY' (set to 'Comfy') and 'OPTIONS' (with links to 'Switch to Salesforce Classic' and 'Add Username'). The status bar at the bottom shows the date and time as '20-09-2023 12:49 AM'.

Q2. For Guest Object, Regional Manager should be given Read and Create Field permission while Agent Profile should be given Read, Edit and Delete access.



Ans. Step1: Edit Regional Manager Profile.

The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. A context menu is open over the 'Regional Manager' profile, with the 'Edit' option highlighted and circled in red. The menu also includes options for 'Delete' and 'Clone'. The 'Edit' option is circled in red.

Step2: Under Custom Object Permissions, Check “Read” and “Create” | Save

Step3: Edit Agent Profile and check "Read", "Create" and "Edit" for Guest Object.

View All - Check the boxes in this column if you want users with this profile to have view access to all records of the selected object type, regardless of the sharing settings for the object.

Modify All - Check the boxes in this column if you want users with this profile to have full access to all records of the selected object type, regardless of the sharing settings for the

object. The Modify All permission allows you to: - Read, Edit, and Delete all records for the object - Transfer all records for the object - Share all records for the object - Administer records in an approval process

To ensure “Sharing Settings” at record level don’t affect this setup, we check them both.

The screenshot shows the Salesforce Setup interface under the Profiles section. On the left, there's a sidebar with options like Users, Profiles, Public Groups, Queues, Roles, User Management Settings, and so on. The main area is titled 'Profiles' and shows two tables of access settings. The first table is for 'Basic Access' and the second for 'Data Administration'. In the 'Guests' row, under 'Basic Access', 'Read' is checked. Under 'Data Administration', 'View All' and 'Modify All' are checked. Other rows like 'Addresses', 'Bookings', 'Cars', etc., have mostly empty checkboxes.

Otherwise, the Read Permission won't work for the records created by admin and none will be visible.

The screenshot shows the Hotel Booking App interface. At the top, it says 'All Guests'. Below that is a table header with columns: Guest ID, First Name, Last Name, and Gender. A message 'No items to display.' is shown below the table. On the right, a sidebar is open for a user named 'Ram Modi'. It shows 'USERNAMES' with 'harsha@bts.com' and 'btscom-dev-ed.develop.my.salesforce.com'. Under 'DISPLAY DENSITY', 'Comfy' is selected. Under 'OPTIONS', there are links to 'Switch to Salesforce Classic' and 'Add Username'.

Step4: Guest Object as System Admin.

The screenshot shows the Hotel Booking App interface. The 'Guests' tab is active. A context menu is displayed over the second guest record (GID-0000002), listing 'Edit', 'Delete', and 'Change Owner' options. The guest list table includes columns for Guest ID, First Name, Last Name, Gender, and Owner First Name. Two records are visible: GID-0000001 (Harsha Hargunani, Female, Harsha) and GID-0000002 (Lana Del, Female, Harsha).

Step5: Change List Views from “Recently visited” to “All”. All records can be viewed and read by Ram Modi - Regional Manager. Hence Read Permission verified.

The screenshot shows the Hotel Booking App interface. The 'Guests' tab is active. The 'Recently Viewed' dropdown is highlighted with a red circle. The 'All' option is selected under the 'LIST VIEWS' section. Below the list, a message states: 'You haven't viewed any Guests recently. Try switching list views.' The guest list table is empty, showing '0 items'.

All | Guests | Salesforce

btscm-dev-ed.develop.lightning.force.com/lightning/o/Guest_c/list?filterName=00B5j000000Jt0EAB

Search...

Hotel Booking App

Guests

All

2 items • Sorted by Guest ID • Filtered by All guests • Updated a few seconds ago

	Guest ID ↑	First Name	Last Name	Gender
1	GID-0000001	Harsha	Hargunani	Fem
2	GID-0000002	Lana	Del	Fem

Ram Modi
btscm-dev-ed.develop.my.salesforce.com
Settings Log Out

USERNAMES
harsha@bts.com
btscm-dev-ed.develop.my.salesforce.com

DISPLAY DENSITY
✓ Comfy (Compact selected)

OPTIONS
Switch to Salesforce Classic ⓘ
Add Username

27°C Mostly cloudy

ENG IN 07:45 PM 22-09-2023

Step6: Click on New and attempt to create a new record. Hence Create Permission verified.

All | Guests | Salesforce

btscm-dev-ed.develop.lightning.force.com/lightning/o/Guest_c/list?filterName=00B5j000000Jt0EAB

Search...

Hotel Booking App

Guests

All

3 items • Sorted by Guest ID • Filtered by All guests • Updated a few seconds ago

	Guest ID ↑	First Name	Last Name	Gender	Owner First Name
1	GID-0000001	Harsha	Hargunani	Female	Harsha
2	GID-0000002	Lana	Del	Female	Harsha
3	GID-0000008	Varonica	Stevens	Female	Ram

New

Printable View

27°C Mostly cloudy

ENG IN 07:46 PM 22-09-2023

Step7: Click on the dropdown icon and attempt to Edit or Delete the newly created record. No such option is available, hence verified.

A screenshot of a Salesforce Lightning page titled "Guests All". The page displays a table of guest records with columns: Guest ID, First Name, Last Name, Gender, and Owner First Name. The records are: 1. GID-0000001 (Harsha, Hargunani, Female, Harsha), 2. GID-0000002 (Lana, Del, Female, Harsha), and 3. GID-0000008 (Varonica, Stevens, Female, Ram). A dropdown menu is open on the far right of the last row, showing the message "No actions available".

Also, under setup, the Guest Object cannot be edited.

A screenshot of the Salesforce Setup Object Manager. The "Object Manager" tab is selected. A specific object named "Guest" is being viewed. The "Details" section shows the object's configuration, including its API name ("Guest__c"), which is highlighted with a pink oval containing question marks. Other visible settings include "Description" (Hotel Booking App 2), "Custom" status, and various checkboxes for "Enable Reports", "Track Activities", "Track Field History", and "Deployment Status".

Also, under Fields and Relationships, When we try to create a new Field. We get an "Insufficient Privileges Error" message.

Screenshots showing the Salesforce Object Manager interface for the Guest object.

The top screenshot shows the "Fields & Relationships" list with a "New" button highlighted by a red circle. The sidebar includes "Details", "Fields & Relationships", and "Page Layouts". The right sidebar shows user information and settings.

FIELD LABEL	FIELD NAME	DATA TYPE
Age	Age_c	Formula (Number)
Created By	CreatedByld	Lookup(User)
Date Of Birth	DOB_c	Date
Email ID	Email_ID_c	Email (Unique)
First Name	First_Name_c	Text(15)
Gender	Gender_c	Picklist
Guest ID	Name	Auto Number
Last Modified By	LastModifiedByld	Lookup(User)

The bottom screenshot shows the "Fields & Relationships" page with an "Insufficient Privileges" error message. It lists "Page Layouts", "Lightning Record Pages", "Buttons, Links, and Actions", "Compact Layouts", and "Field Sets".

Fields & Relationships

11 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE
Age	Age_c	Formula (Number)
Created By	CreatedByld	Lookup(User)
Date Of Birth	DOB_c	Date
Email ID	Email_ID_c	Email (Unique)
First Name	First_Name_c	Text(15)
Gender	Gender_c	Picklist
Guest ID	Name	Auto Number
Last Modified By	LastModifiedByld	Lookup(User)

Insufficient Privileges

You do not have the level of access necessary to perform the operation you requested. Please contact the owner of the record or your administrator if access is necessary. For more information, see [Insufficient Privileges Errors](#).

Click [here](#) to return to the previous page.

Step8: Login as Krishna Modi - Agent. All records can be seen, hence Read Permission Verified.

The screenshot shows a web browser window for the "Hotel Booking App". The URL is https://btscom-dev-ed.lightning.force.com/lightning/o/Guest__c/list?filterName=00B5j00000Ojt0tEAB. The page displays a list of guests with columns: Guest ID, First Name, Last Name, and Gender. The first three rows show guest IDs GID-0000001, GID-0000002, and GID-0000006 respectively, with first names Harsha, Lana, and Varonica, and last names Hargunani, Del, and Stevens, all marked as Female. A context menu is open over the first guest record, showing options: DISPLAY DENSITY (Compact selected), OPTIONS (Switch to Salesforce Classic, Add Username), and user information (Krishna Modi, btscm-dev-ed.develop.my.salesforce.com, Settings, Log Out). The browser toolbar at the bottom includes icons for search, refresh, and various extensions. The system tray shows the date and time as 20-09-2023, 01:35 AM.

Step9: Option to Edit and Delete are available.

The screenshot shows the same web browser window for the "Hotel Booking App". The URL is the same as in the previous screenshot. The guest list is identical. A context menu is open over the first guest record, with the "Edit" option highlighted. Other visible options in the menu include "Delete" and "Change Owner". The browser and system tray elements are consistent with the previous screenshot.

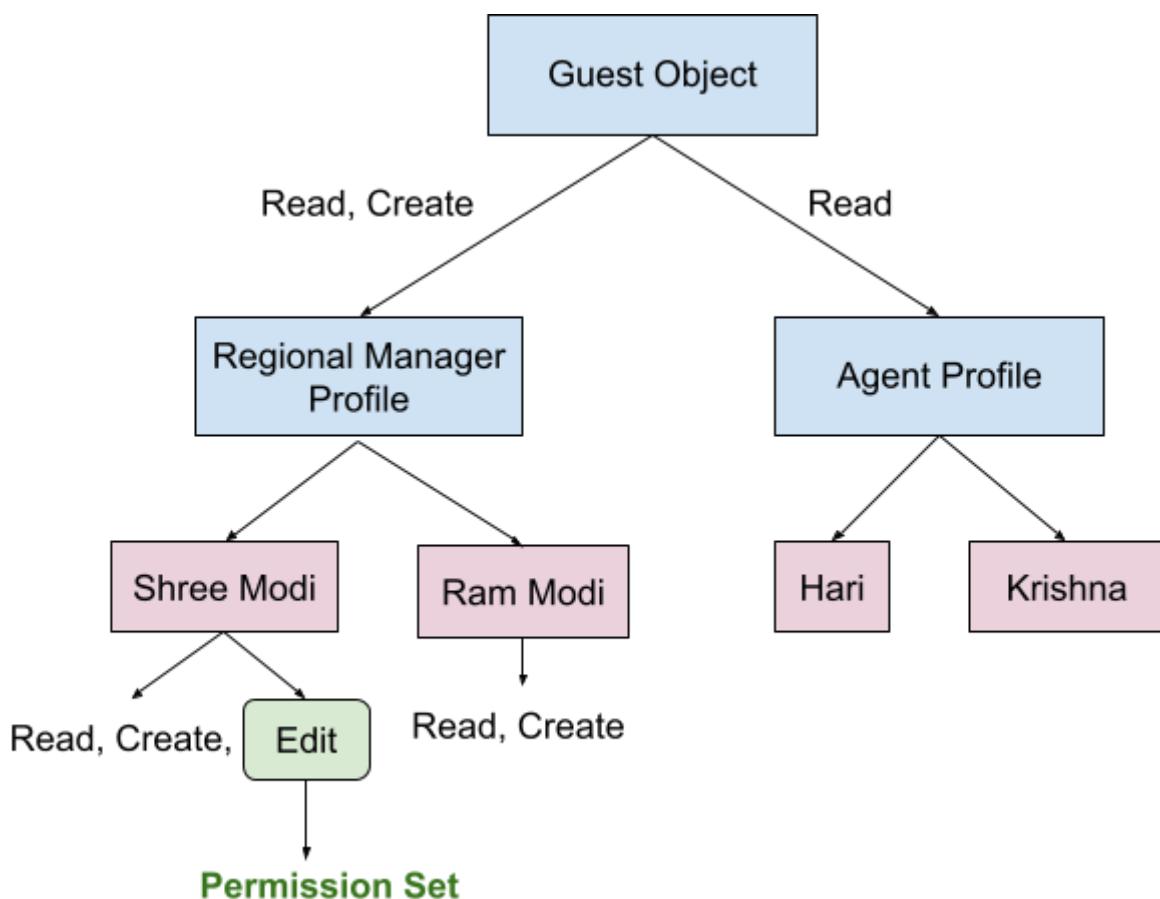
Step10: No option to create a “New” record. Hence verified “Create” permission wasn’t granted.

The screenshot shows a Salesforce Lightning interface for a "Hotel Booking App". The page title is "Guests All". The main content is a table listing three guests:

	Guest ID	First Name	Last Name	Gender	Owner First Name
1	GID-0000001	Harsha	Hargunani	Female	Harsha
2	GID-0000002	Lana	Del	Female	Harsha
3	GID-0000006	Varonica	Stevens	Female	Ram

A red circle highlights the question mark icon in the top right corner of the page header.

Q3. Give extra permissions using permission set. Following flowchart represents the scenario.



Step1: Setup | Profiles | Edit - Regional Manager | Custom Object Setting -

Step2: Edit - Agent | Custom Object Settings -

Step3: Assign these profiles to 4 users -

The screenshot shows the Salesforce Setup - Users page. On the left, there's a sidebar with links like Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and a prominent **Users** link. The main area displays a table of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The profiles listed are Agent, Analytics Cloud Integration User, Analytics Cloud Security User, Chatter Free User, Customer Care, Regional Manager, and System Administrator. Most users have the 'Active' checkbox checked.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Modi_Hari	harimod	harimodi@agent.com	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Agent
<input type="checkbox"/> Edit	Modi_Krishna	krismodi	krishnamodi@agent.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Integration	integ	integration@00d5j00000c7udvea3.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00d5j00000c7udvea3.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Expert
<input type="checkbox"/> Edit	Bunny	buntny	buntnymodi@customercare.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Customer Care
<input type="checkbox"/> Edit	Jai	jaimodi	jaimodi@regionalmanager.com	<input type="checkbox"/>	<input type="checkbox"/>	Regional Manager
<input type="checkbox"/> Edit	Shree	shrimodi	shreemodi@regionalmanager.com	<input type="checkbox"/>	<input type="checkbox"/>	Regional Manager
<input type="checkbox"/> Edit	Ram	rammodi	rammodi@regionalmanager.com	<input type="checkbox"/>	<input type="checkbox"/>	Regional Manager
<input type="checkbox"/> Edit	Hargunani_Harsha	HHarg	harsha@bts.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator

Step4: Verify Agent Profile's permissions. User - Krishna Modi

All records as visible - Read ✓

The screenshot shows the Hotel Booking App interface. On the left, there's a guest list table with columns for Guest ID, First Name, Last Name, and Gender. The table has three items: GID-0000001 (Harsha Hargunani), GID-0000002 (Lana Del), and GID-0000008 (Varonica Stevens). On the right, there's a user profile for Krishna Modi, showing his email (btscom-dev-ed.develop.my.salesforce.com) and options to switch to Salesforce Classic or add a username. The user interface includes a sidebar with links for Guests, Dashboards, Reports, and Guests.

Edit Access - ✗

Create Access - ✗ ("New" button doesn't appear)

A screenshot of a Salesforce guest list page. The top navigation bar shows "All Guests | Salesforce" and "New Tab". The main content area displays a table of guests with columns: Guest ID, First Name, Last Name, Gender, and Owner First Name. The table contains three rows of data. A status message at the bottom right of the table says "No actions available". A pink oval highlights this message.

Step5: Also under Setup | Object Manager | Guest.

There is no "Edit | Delete" button on object details as well as fields and relationships page.

Edit, Delete - ✗ (Setup)

A screenshot of the Salesforce Object Manager. The top navigation bar shows "All Guests | Salesforce", "Guest | Salesforce", and "New Tab". The main content area shows the "Guest" object details. On the left, there's a sidebar with "Details" and a list of configuration items like Fields & Relationships, Page Layouts, etc. On the right, there are two sections: "Details" and "Fields & Relationships". The "Fields & Relationships" section has several checkboxes, one of which is circled in pink. The "Details" section shows the API name "Guest__c" and other details. A pink oval highlights the "Fields & Relationships" section.

The screenshot shows the Salesforce Object Manager interface under the 'Setup' tab. The left sidebar lists various setup categories like Page Layouts, Lightning Record Pages, and Field Sets. The main area displays a table titled 'Fields & Relationships' with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. A pink circle highlights the 'INDEXED' column header. The table contains several rows of field definitions.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Age	Age_c	Formula (Number)		
Created By	CreatedById	Lookup(User)		
Date Of Birth	DOB_c	Date		
Email ID	Email_ID_c	Email (Unique)		✓
First Name	First_Name_c	Text(15)		
Gender	Gender_c	Picklist		
Guest ID	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup(User)		

However, there is a “New” button. When attempting to create a new field, we get an “Insufficient Privileges” error.

Hence, Create Access - ✗ (Setup)

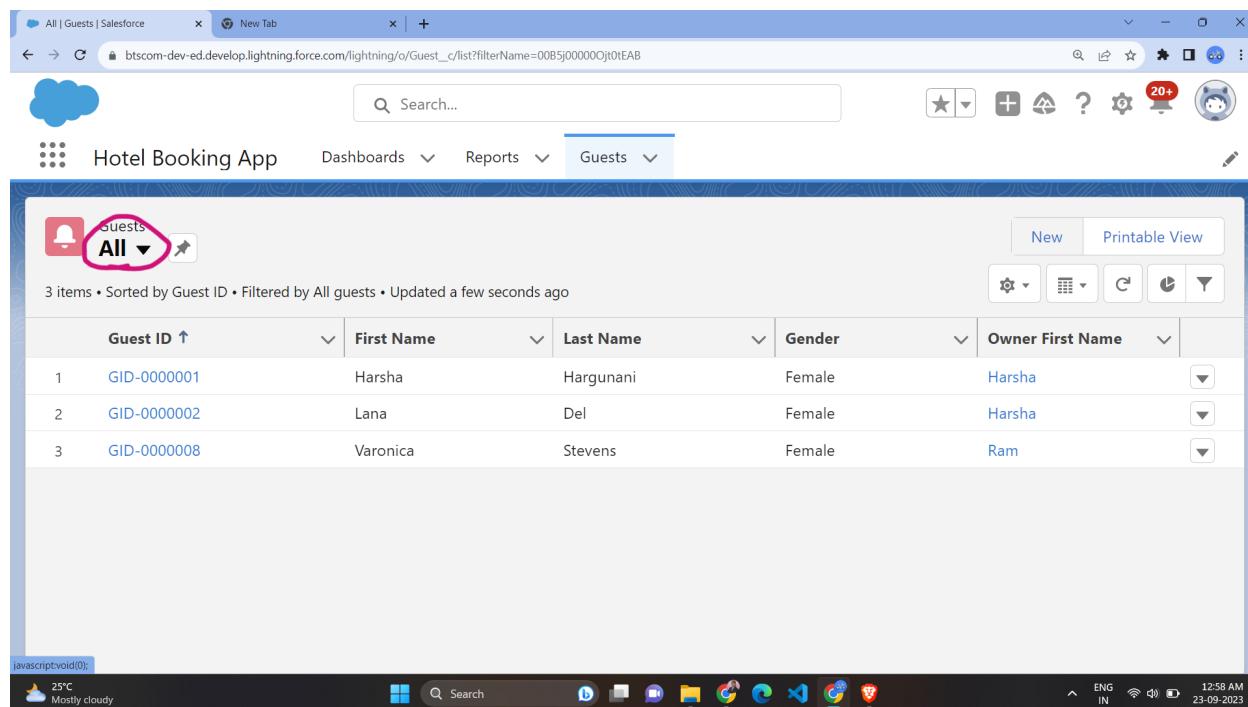
Can we say that under Profiles “Field-Level Security” works while record creation and not under “Setup”. For this we need to enable “Customize Application” in Profile under “Administrative Permissions”.

The screenshot shows the Salesforce Setup interface under the 'Setup' tab. The left sidebar lists various setup categories. The main area displays a table titled 'Agent' under 'Field-Level Security'. The table has columns: Field Name, Field Type, Read Access, and Edit Access. Checkmarks indicate which permissions are granted for each field.

Field Name	Field Type	Read Access	Edit Access
Age	Number	✓	✗
Created By	Lookup	✓	✗
Date Of Birth	Date	✓	✓
Email ID	Email	✓	✓
First Name	Text	✓	✓
Gender	Picklist	✓	✓
Guest ID	Auto Number	✓	✗
Last Modified By	Lookup	✓	✗
Last Name	Text	✓	✓
Owner	Lookup	✓	✓
Phone No	Phone	✓	✓

Step6: Verify Regional Manager's permissions. User - Shree Modi

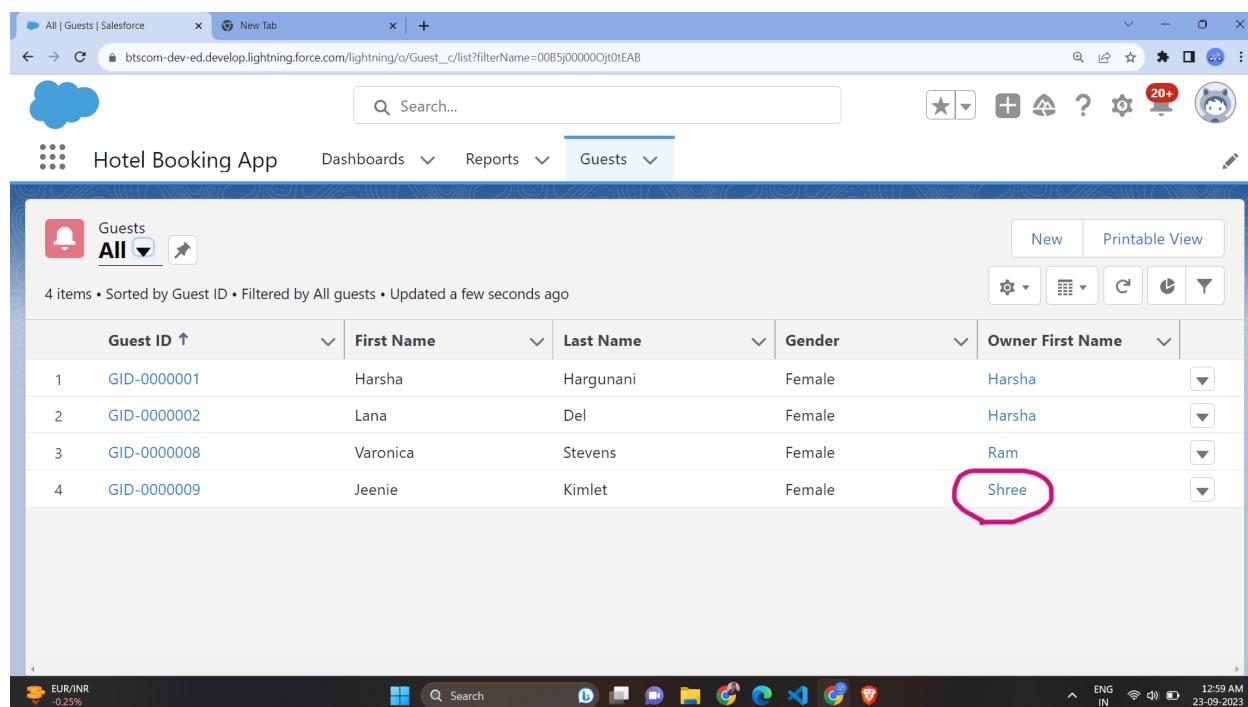
Read - ✓



The screenshot shows a web browser window for the 'Hotel Booking App'. The URL is https://btscm-dev-ed.lightning.force.com/lightning/o/Guest__c/list?filterName=00B5j00000Ojt0tEAB. The page displays a table of guest information. The 'Guests' filter dropdown at the top left is circled in red. The table has columns: Guest ID, First Name, Last Name, Gender, and Owner First Name. The data is as follows:

	Guest ID ↑	First Name	Last Name	Gender	Owner First Name
1	GID-0000001	Harsha	Hargunani	Female	Harsha
2	GID-0000002	Lana	Del	Female	Harsha
3	GID-0000008	Varonica	Stevens	Female	Ram

Create - ✓



The screenshot shows a web browser window for the 'Hotel Booking App'. The URL is https://btscm-dev-ed.lightning.force.com/lightning/o/Guest__c/list?filterName=00B5j00000Ojt0tEAB. The page displays a table of guest information. The 'Guests' filter dropdown at the top left is circled in red. The table has columns: Guest ID, First Name, Last Name, Gender, and Owner First Name. The data is as follows:

	Guest ID ↑	First Name	Last Name	Gender	Owner First Name
1	GID-0000001	Harsha	Hargunani	Female	Harsha
2	GID-0000002	Lana	Del	Female	Harsha
3	GID-0000008	Varonica	Stevens	Female	Ram
4	GID-0000009	Jeenie	Kimlet	Female	Shree

Edit -

All | Guests | Salesforce x New Tab x +

btscm-dev-ed.develop.lightning.force.com/lightning/o/Guest__c/list?filterName=00B5j000000jt0EAB

Search...

Hotel Booking App Dashboards Reports Guests

Guests All

4 items • Sorted by Guest ID • Filtered by All guests • Updated a minute ago

	Guest ID ↑	First Name	Last Name	Gender	Owner First Name	
1	GID-0000001	Harsha	Hargunani	Female	Harsha	<input type="button" value="▼"/>
2	GID-0000002	Lana	Del	Female	Harsha	<input type="button" value="▼"/>
3	GID-0000008	Varonica	Stevens	Female	Ram	<input type="button" value="▼"/>
4	GID-0000009	Jeenie	Kimlet	Female	Shree	<input type="button" value="▼"/>

No actions available

javascript:void(0)

AUD/INR +0.29% Search

ENG IN 01:00 AM 23-09-2024

Step7: Back to System Admin, Users | Permission Set

The screenshot shows the Salesforce Lightning Home page. The top navigation bar includes tabs for 'Home | Salesforce' and 'New Tab'. The main header features a search bar with the placeholder 'Search Setup' and a user profile icon for 'Harsha Hargunani'. The left sidebar, titled 'Setup', contains sections for 'Lightning Usage', 'Optimizer', and 'ADMINISTRATION', which includes 'Users' (expanded), 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and 'Users'. The central content area displays the 'SETUP Home' screen with a banner for 'Get Started with Einstein Bots' and another for 'Mobile Pub...'. A sidebar on the right provides options for 'DISPLAY DENSITY' (set to 'Comfy'), 'OPTIONS' (with links to 'Switch to Salesforce Classic' and 'Add Username'), and a 'USERNAME' section listing 'shreemodi@regionalmanager.com' and 'krishnamodi@agent.com'.

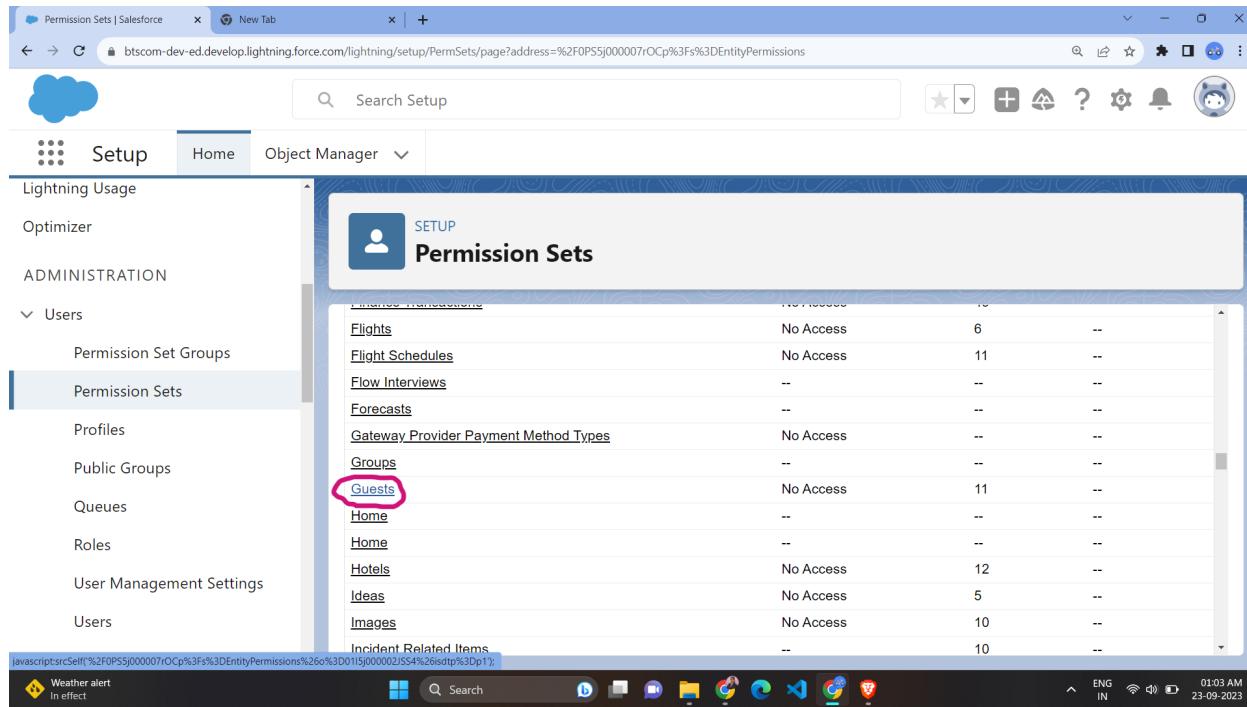
Step8: Create a new Permission Set | License - Salesforce

The screenshot shows the Salesforce Setup interface. On the left, the navigation bar includes 'Setup' (selected), 'Home', and 'Object Manager'. Under 'ADMINISTRATION', 'Users' is expanded, showing 'Permission Set Groups', 'Permission Sets' (selected), 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and 'Users'. A 'Weather alert In effect' notification is visible at the bottom left. The main content area is titled 'Permission Sets' and shows a form for creating a new permission set. The 'Label' field contains 'Shree_Modl_Edit_Access', the 'API Name' field also contains 'Shree_Modl_Edit_Access', and the 'Description' field is empty. The 'Session Activation Required' checkbox is unchecked. Below the form, a section titled 'Select the type of users who will use this permission set' is partially visible. The status bar at the bottom right shows 'ENG IN' and the date '23-09-2023'.

Next | Object Settings

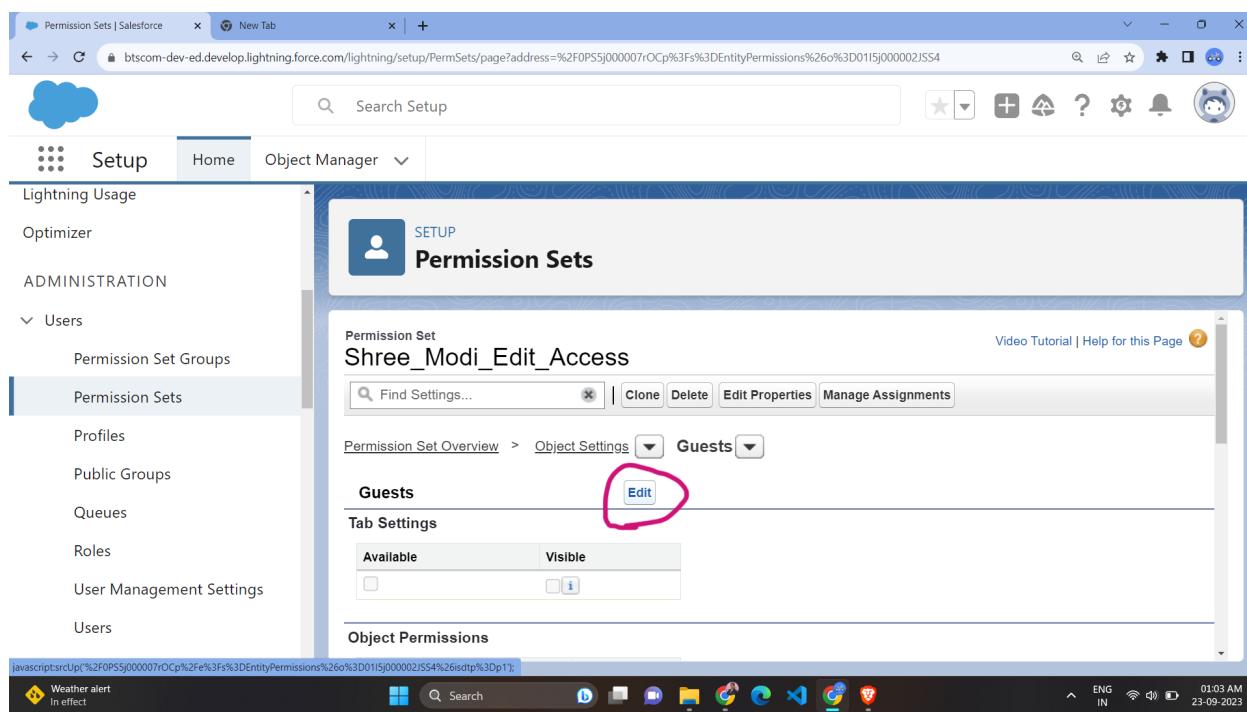
The screenshot shows the Salesforce Setup interface. The left navigation bar is identical to the previous screenshot. The main content area is titled 'Permission Sets' and displays a list of settings sections. The 'Object Settings' section is highlighted with a red circle. The other sections listed are 'Assigned Apps', 'Assigned Connected Apps', 'App Permissions', 'Apex Class Access', and 'Visualforce Page Access'. The status bar at the bottom right shows 'ENG IN' and the date '23-09-2023'.

Step9: Select Object | Edit



The screenshot shows the Salesforce Setup interface under the Administration section. The left sidebar is expanded to show 'Users' and 'Permission Sets'. The 'Permission Sets' item is selected and highlighted with a blue background. The main content area displays a table titled 'Permission Set' with a blue header. The table lists various objects and their access levels. One row, 'Guests', is circled in red. The table includes columns for 'Object', 'Access Level', 'Count', and 'Last Modified'. The 'Last Modified' column shows dates like '10/09/2023' and '23-09-2023'. The bottom status bar indicates 'Weather alert In effect'.

Object	Access Level	Count	Last Modified
Flights	No Access	6	--
Flight Schedules	No Access	11	--
Flow Interviews	--	--	--
Forecasts	--	--	--
Gateway Provider Payment Method Types	No Access	--	--
Groups	--	--	--
Guests	No Access	11	--
Home	--	--	--
Hotels	No Access	12	--
Ideas	No Access	5	--
Images	No Access	10	--
Incident Related Items	--	10	--



The screenshot shows the 'Edit Properties' screen for a permission set named 'Shree_Mod_i_Edit_Access'. The top navigation bar includes 'Find Settings...', 'Clone', 'Delete', 'Edit Properties', and 'Manage Assignments'. Below this, the breadcrumb navigation shows 'Permission Set Overview > Object Settings > Guests'. A red circle highlights the 'Edit' button next to the 'Guests' tab. The 'Tab Settings' section shows two tabs: 'Available' and 'Visible'. The 'Available' tab has a single checkbox checked. The 'Object Permissions' section is partially visible at the bottom. The bottom status bar indicates 'Weather alert In effect'.

Step10: Set Tab Visibility. Under Object settings, check "Edit"

Permission Sets | Salesforce

Setup Home Object Manager

Lightning Usage

Optimizer

ADMINISTRATION

Users

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users

Tab Settings

Available	Visible
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> i

Object Permissions

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input type="checkbox"/>

Step11: To check for Field-Level Security. Keep "Email ID" unchecked, while checking "Last Name" and "Gender" - Edit!

Permission Sets | Salesforce

Setup Home Object Manager

Lightning Usage

Optimizer

ADMINISTRATION

Users

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users

Field Permissions

Field Name	Read Access	Edit Access
Age	<input type="checkbox"/>	<input type="checkbox"/>
Created By	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Date Of Birth	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Email ID	<input type="checkbox"/>	<input type="checkbox"/> X
First Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Gender	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> ✓
Guest ID	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Last Modified By	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Last Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> ✓
Owner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Phone No	<input type="checkbox"/>	<input type="checkbox"/>

Harsha Hargunani
btscom-dev-ed.develop.my.salesforce.com
[Settings](#) [Log Out](#)

USERNAMES

shreemodi@regionalmanager.com
btscom-dev-ed.develop.my.salesforce.com

DISPLAY DENSITY

Comfy

Compact

OPTIONS

[Switch to Salesforce Classic](#) !
[Add Username](#)

Step12: Save | Manage Assignments | Add Assignment

The screenshot shows the Salesforce Setup interface under the 'Permission Sets' section. A permission set named 'Shree_Mod_I_Edit_Access' is selected. At the top of the page, there is a toolbar with buttons for 'Find Settings...', 'Clone', 'Delete', 'Edit Properties', and 'Manage Assignments'. The 'Manage Assignments' button is circled in red. Below the toolbar, there are tabs for 'Permission Set Overview', 'Object Settings', and 'Guests'. Under 'Object Permissions', there is a table with columns 'Available' and 'Visible'. The bottom of the page features a decorative graphic of clouds and a cactus.

The screenshot shows the 'Current Assignments' page for the 'Shree_Mod_I_Edit_Access' permission set. At the top right of the main content area, there is a 'Add Assignment' button, which is circled in red. The background of the page features a decorative graphic of clouds and a cactus.

Step13: Check the user to assign the permission set to - "Shree Modi" - Regional Manager.

The screenshot shows the Salesforce Setup interface under the 'Permission Sets' section. A user named 'Shree Modi' is selected, indicated by a checked checkbox in the 'Selected' column. The 'Next' button is visible at the bottom right of the list.

User	Role	Profile	Active	License	Expires On
Integration integ	Analytics Cloud Inte...	integ	✓		
Jai Modi jaimodi	Regional Manager	jaimodi@regionalm...	✗		
Krishna Mc krismodi	Agent	krishnamodi@agen...	✗		
Ram Modi rammodi	Regional Manager	rammodi@regional...	✗		
Security Us sec	Analytics Cloud Sec...	insightssecurity@00...	✓		
Shree Mod shrimodi	Regional Manager	shreemodi@region...	✓		

Step14: Next | Assign

The screenshot shows the 'Select an Expiration Option For Assigned Users' dialog. The 'No expiration date' option is selected. Below it, a table lists the assigned user 'Shree Modi' with details: Role 'Regional Manager', Profile 'Salesforce', and 'Expires On' set to 'Never Expires'. The 'Assign' button is visible at the bottom right.

Full Name	Role	Profile	Active	User License	Expires On
Shree Modi	Regional Manag...	Salesforce	✓		Never Expires

Step15: Login as Shree Modi again. "Edit" option appears for records in the Guest object.

The screenshot shows a web browser window for the 'Hotel Booking App'. The URL is https://btscm-dev-ed.lightning.force.com/lightning/o/Guest_c/list?filterName=00B5j00000Ojt0tEAB. The page displays a list of guests with columns: Guest ID, First Name, Last Name, Gender, and Owner First Name. The fourth guest record has 'Kimlet' in the Last Name field, which is underlined in red. A context menu is open at this row, showing options 'Edit' and 'Change Owner'. The 'Edit' option is highlighted and circled in red. The browser's status bar at the bottom shows '25°C Mostly cloudy' and the date '23-09-2023'.

	Guest ID ↑	First Name	Last Name	Gender	Owner First Name
1	GID-0000001	Harsha	Hargunani	Female	Harsha
2	GID-0000002	Lana	Del	Female	Harsha
3	GID-0000008	Varonica	Stevens	Female	Ram
4	GID-0000009	Jeenie	Kimlet	Female	Shree

Step16: Attempt to change Last Name: Kimlet -> Kim. Success! ✓

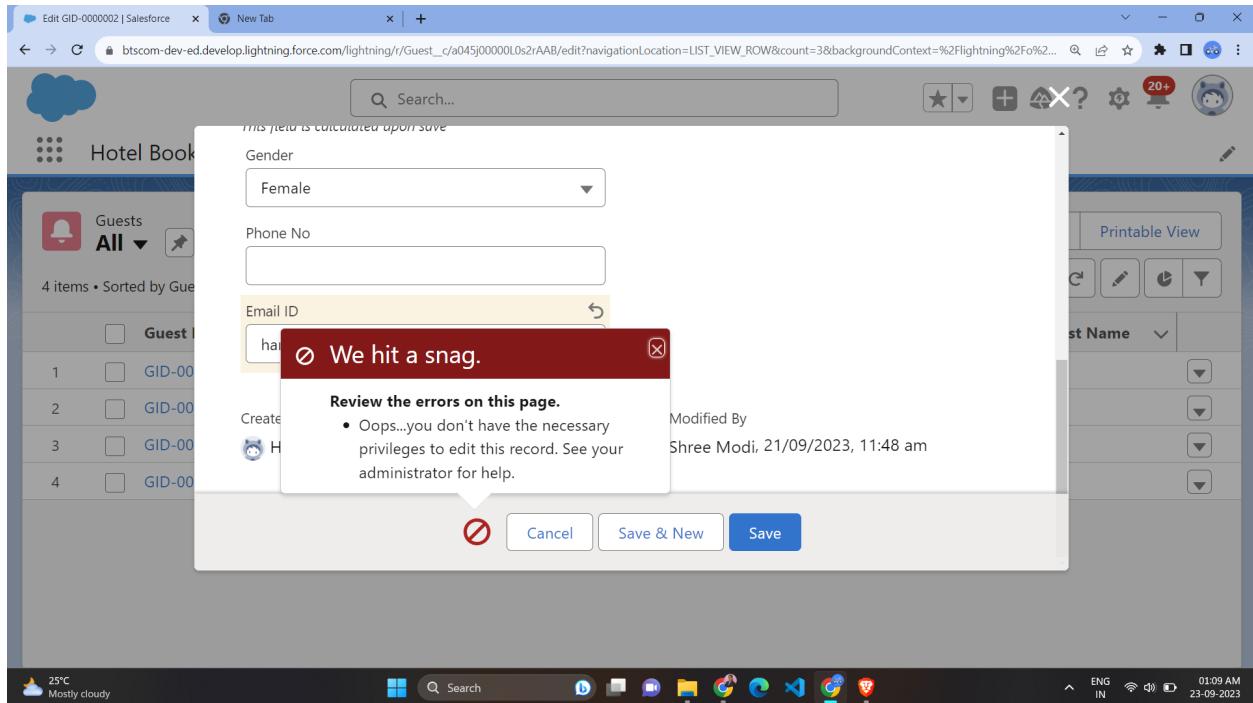
The screenshot shows the same web browser window as the previous one, but now the fourth guest record's Last Name is 'Kim', as indicated by the red underline. The context menu is still open at this record, showing the 'Edit' and 'Change Owner' options. The browser's status bar at the bottom shows '25°C Mostly cloudy' and the date '23-09-2023'.

	Guest ID ↑	First Name	Last Name	Gender	Owner First Name
1	GID-0000001	Harsha	Hargunani	Female	Harsha
2	GID-0000002	Lana	Del	Female	Harsha
3	GID-0000008	Varonica	Stevens	Female	Ram
4	GID-0000009	Jeenie	Kim	Female	Shree

Step18: Attempt to change the Email ID.

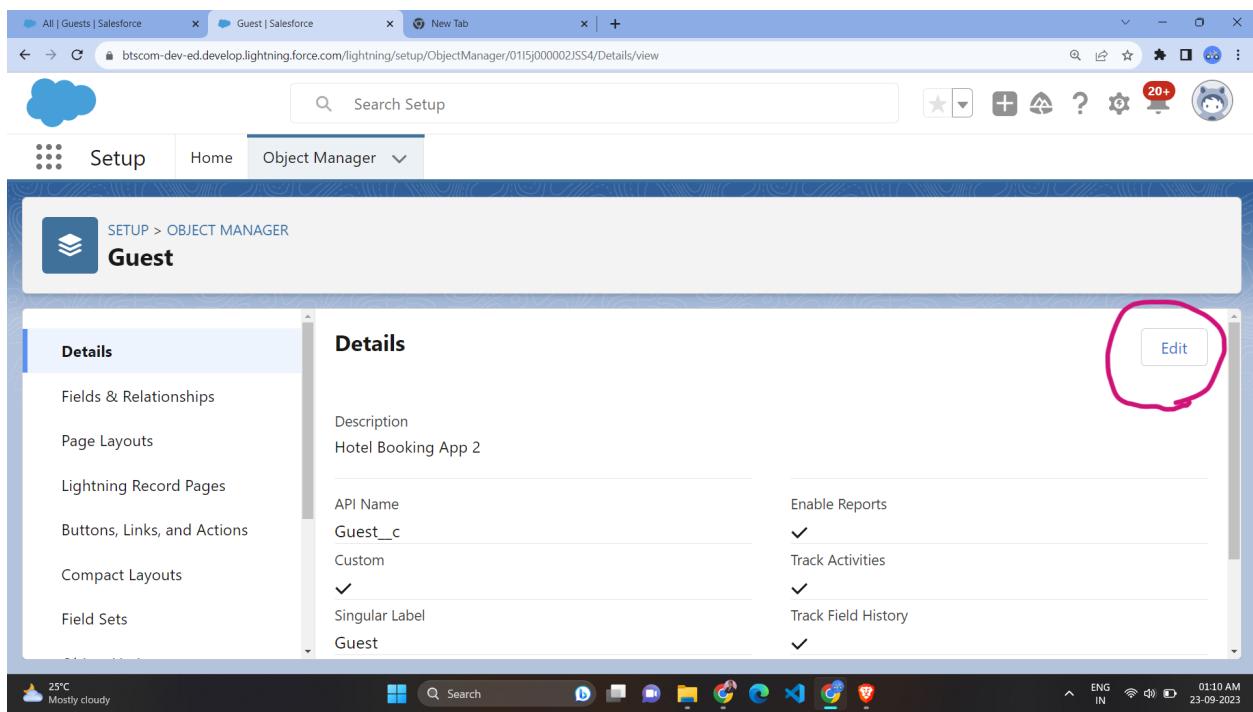
This screenshot shows a Salesforce Lightning component for editing a guest record. The modal dialog is titled 'Edit GID-0000002 | Salesforce'. It contains fields for Gender (Female), Phone No., and Email ID. The Email ID field currently contains 'hargunanihm@rkne...'. Below the fields are 'Created By' (Harsha Hargunani) and 'Last Modified By' (Shree Modi). At the bottom of the dialog are three buttons: 'Cancel', 'Save & New', and a blue 'Save' button. The background shows a list of guests with 4 items, sorted by Guest ID. The system status bar at the bottom indicates it's 23-09-2023, 01:09 AM, ENG IN, and the weather is 25°C Mostly cloudy.

This screenshot is identical to the one above, but the Email ID field now contains 'hargunanihm@gmail.com'. The rest of the dialog and background are the same, showing the guest list and system status.



Not a success. Hence verified! That field level security can be granted using permission sets.

Also, "Edit" option appears in Setup | Guest Object Details



However, the fields cannot be still edited, nor can new fields be created. It gives "Insufficient Privileges" Error.

The screenshot shows the Salesforce Setup interface with the Object Manager selected. The main area displays a table of fields under the 'Fields & Relationships' tab. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The indexed status for the 'First Name' field is checked.

Because these permissions are controlled by the "Customize Application" option under the "Administration Permissions" of Profiles page.

Q4. Difference between profile and permission set.

Ans.

Sr.no	Aspect	Profiles	Permission Set
1.	Assignment S	Assigned to users based on roles	Assigned to users independently
2.	Number of Assignment S	One profile per user	Multiple permission sets per user
3.	Object-Lev el Access	Control access to standard and custom objects	Extend or modify access to objects
4.	Field-Level Access	Control access to fields within objects	Extend or modify field-level access
5.	System Permission s	Include system-level permissions affecting general functionality	Can't grant system-level permissions

6.	Login Hours/IP Restrictions	Define when and from where users can log in	Cannot control login hours or IP restrictions
7.	Flexibility	Less flexible for granular access control	Highly flexible for fine-grained access customization
8.	Dynamic Assignment	Changes to profiles affect all users with that profile	Can assign or revoke permission sets individually without affecting the user's profile.

Q5. What we can do in the Profile, But not in the Permission Set?

Ans. In Salesforce, profiles and permission sets serve different purposes, and there are certain actions and settings that can be performed in profiles but not in permission sets.

1. Login Hours and IP Restrictions:

- Profiles can define specific login hours and IP restrictions for users, controlling when and from where they can log in.
- Permission sets do not offer this level of control over login hours or IP restrictions.

2. System-Level Permissions:

- Profiles include system-level permissions that affect general functionality, such as the ability to modify all data, manage users, or customize application settings.
- Permission sets cannot grant or revoke these system-level permissions.

3. Assignment to Standard Objects:

- Profiles are used to control access to standard objects like Accounts, Contacts, and Opportunities.
- Permission sets are typically used to extend or modify access to custom objects and fields.

4. Organization-Wide Defaults (OWD):

- Profiles play a role in defining organization-wide defaults (OWD) for object access, determining the initial level of access for all users.
- Permission sets do not influence OWD settings; they focus on extending or modifying access within the existing OWD.

5. Assignment to Users Based on Role:

- Profiles are assigned to users based on their roles within the organization's role hierarchy.
- Permission sets can be assigned to users independently of their roles, providing more flexibility.

Q6. What we can do in the Permission Set, but not in the Profile?

Ans. In Salesforce, permission sets provide additional flexibility for granting specific permissions and access to users beyond what is defined in their profiles.

1. Extending Object and Field Permissions:

Permission sets allow you to grant additional object and field permissions, providing users with access to specific objects or fields not available in their profiles.

2. Modifying Record Types and Page Layouts:

Permission sets can assign specific record types and page layouts to users, allowing for custom record view and edit experiences beyond what their profiles provide.

3. Enabling Features and Apps:

Permission sets can enable specific features, like Lightning Experience or Communities, for users, giving them access to features that might be disabled in their profiles.

4. Overriding Profile Settings:

Permission sets can override certain profile settings for users, such as custom app settings, tab settings, or field-level security settings.

5. Temporary Permissions:

Permission sets can be assigned temporarily to provide users with additional permissions for a specific task or project without modifying their profiles.

6. Stacking Permissions:

Users can have multiple permission sets assigned to them, allowing for the stacking of permissions from different sets.

7. No Impact on All Users:

Changes to permission sets only affect users to whom those sets are assigned, without impacting all users with a particular profile.

8. User-Specific Access:

Permission sets are useful for granting access to specific users or groups based on unique needs, without affecting the broader profile settings for all users with that profile.

Q7. There are three users A, B and C having Profile Agent. Currently all the users can R,C,E Account Records. Now, the requirement is, Only user A should be able to R, C,E and User B,C should be able to read only account records. How can I revoke the profile permission using Permission Set?

Ans. Revoking profile permissions using a permission set in Salesforce is not a direct operation. Permission sets are typically used to grant additional permissions to users, rather than revoke permissions granted by their profiles. Hence, this is not possible.