

# Phase 5 – Security, Profiles & Permission Sets

## 1. Objective

Phase 5 focuses on securing the Visitor Management CRM system by setting up profiles, permission sets, field-level security, and providing the correct access levels to users. The goal is to ensure data protection, controlled visibility, and secure operations.

## 2. Understanding Salesforce Security Model

Salesforce uses several layers of security:

1. Organization-Level Security
2. Object-Level Security (Profiles, Permission Sets)
3. Field-Level Security
4. Record-Level Security (OWD, Sharing Rules)

Phase 5 will cover all these areas.

## 3. Profiles Setup

Profiles determine what users can *do* in Salesforce.

### 3.1 Steps to Configure Profiles

1. Go to Setup → Profiles.
2. Clone the Standard User profile to create:
  - Visitor Management Profile
3. Assign this profile to users who manage visitor entry.

### 3.2 Permissions to Provide

- Read, Create, Edit on **Visitor Object**
- Read access to **User Object** (for Host lookup)
- Read access to dashboards and reports

**Setup** Home Object Manager

Search Setup

Pro

yperforce Assistant

Users

Profiles

Data

Mass Transfer Approval Requests

Feature Settings

Approval Settings

Data.com

Inspector Preferences

Inspector Users

Functions

Marketing

Lead Processes

Sales

Products

Asset Settings

Product Schedules Settings

Product Settings

Sales Processes

Salesforce Scheduler

Assignment Policies

**SETUP** Profiles

Profile: **Visitor Management Profile**

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges](#) | 
 [Enabled Apex Class Access](#) | 
 [Enabled Visualforce Page Access](#) | 
 [Enabled External Data Source Access](#) | 
 [Enabled Named Credential Access](#) | 
 [Enabled External Credential Principal Access](#) | 
 [Enabled Custom Metadata Type Access](#) | 
 [Enabled Custom Settings Definitions Access](#) | 
 [Enabled Flow Access](#) | 
 [Enabled Service Presence Status Access](#) | 
 [Enabled Custom Permissions](#)

**Enabled Visualforce Page Access** [Edit](#) [Enabled Visualforce Page Access Help](#) [View Users](#)

No Visualforce Pages enabled

Custom Profile ☒

Description

Created By [Kahani Kappala](#) 12/9/2025, 9:37 AM

Modified By [Kahani Kappala](#) 12/9/2025, 9:37 AM

**Page Layouts**

Standard Object Layouts

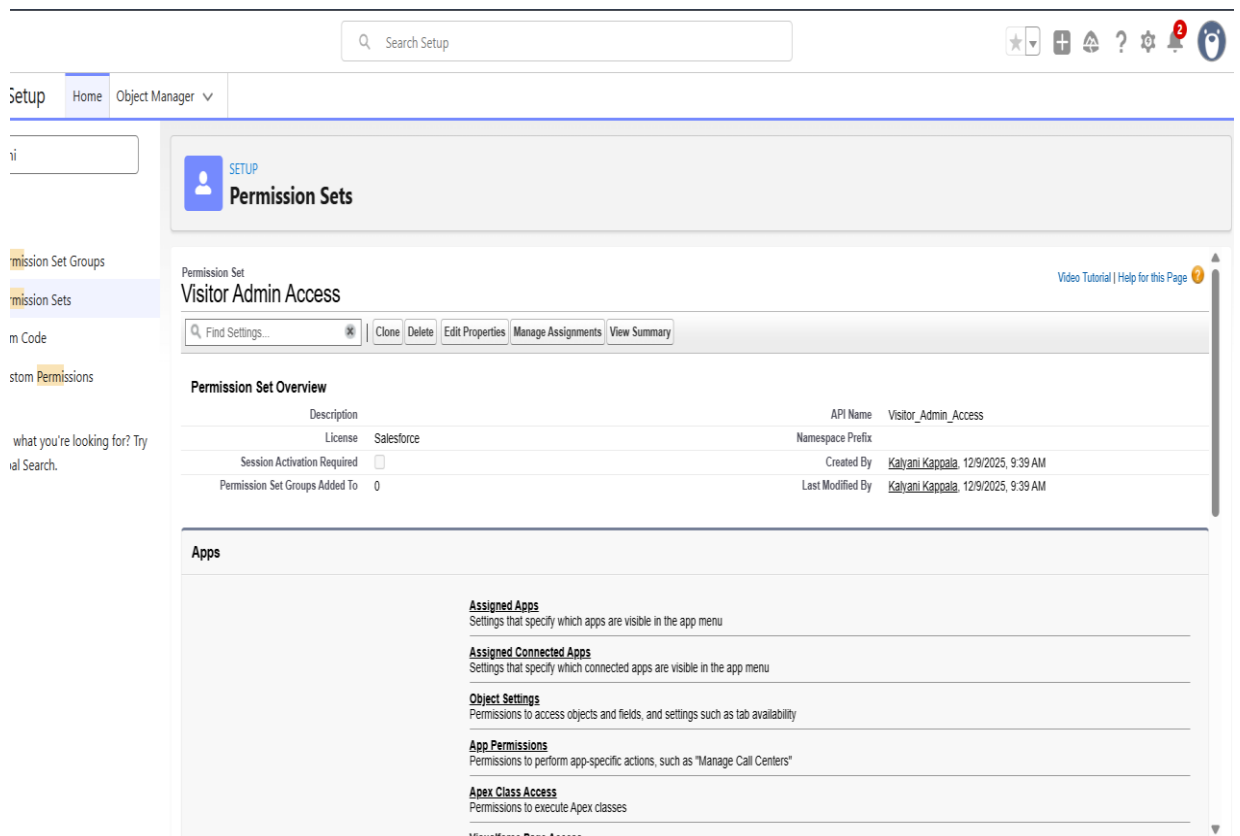
Standard Object Layouts	Global	Location Group	Location Group Assignment	Macro	Object Milestone	Operating Hours	Opportunity	Opportunity Product	Order	Order Product	Payment
Global	<a href="#">Global Layout</a> <a href="#">View Assignment</a>	<a href="#">Location Group Layout</a> <a href="#">View Assignment</a>	<a href="#">Location Group Assignment Layout</a> <a href="#">View Assignment</a>	<a href="#">Macro Layout</a> <a href="#">View Assignment</a>	<a href="#">Object Milestone Layout</a> <a href="#">View Assignment</a>	<a href="#">Operating Hours Layout</a> <a href="#">View Assignment</a>	<a href="#">Opportunity Layout</a> <a href="#">View Assignment</a>	<a href="#">Opportunity Product Layout</a> <a href="#">View Assignment</a>	<a href="#">Order Layout</a> <a href="#">View Assignment</a>	<a href="#">Order Product Layout</a> <a href="#">View Assignment</a>	<a href="#">Payment Layout</a> <a href="#">View Assignment</a>
Email Application	<a href="#">Not Assigned</a> <a href="#">View Assignment</a>	<a href="#">Location Group Assignment Layout</a> <a href="#">View Assignment</a>	<a href="#">Macro Layout</a> <a href="#">View Assignment</a>	<a href="#">Object Milestone Layout</a> <a href="#">View Assignment</a>	<a href="#">Operating Hours Layout</a> <a href="#">View Assignment</a>	<a href="#">Opportunity Layout</a> <a href="#">View Assignment</a>	<a href="#">Opportunity Product Layout</a> <a href="#">View Assignment</a>	<a href="#">Order Layout</a> <a href="#">View Assignment</a>	<a href="#">Order Product Layout</a> <a href="#">View Assignment</a>	<a href="#">Payment Layout</a> <a href="#">View Assignment</a>	
Home Page Layout	<a href="#">Home Page Default</a> <a href="#">View Assignment</a>	<a href="#">Macro Layout</a> <a href="#">View Assignment</a>	<a href="#">Object Milestone Layout</a> <a href="#">View Assignment</a>	<a href="#">Operating Hours Layout</a> <a href="#">View Assignment</a>	<a href="#">Opportunity Layout</a> <a href="#">View Assignment</a>	<a href="#">Opportunity Product Layout</a> <a href="#">View Assignment</a>	<a href="#">Order Layout</a> <a href="#">View Assignment</a>	<a href="#">Order Product Layout</a> <a href="#">View Assignment</a>	<a href="#">Payment Layout</a> <a href="#">View Assignment</a>	<a href="#">Payment Layout</a> <a href="#">View Assignment</a>	
Account	<a href="#">Account Layout</a> <a href="#">View Assignment</a>	<a href="#">Object Milestone Layout</a> <a href="#">View Assignment</a>	<a href="#">Operating Hours Layout</a> <a href="#">View Assignment</a>	<a href="#">Opportunity Layout</a> <a href="#">View Assignment</a>	<a href="#">Opportunity Product Layout</a> <a href="#">View Assignment</a>	<a href="#">Order Layout</a> <a href="#">View Assignment</a>	<a href="#">Order Product Layout</a> <a href="#">View Assignment</a>	<a href="#">Payment Layout</a> <a href="#">View Assignment</a>	<a href="#">Payment Layout</a> <a href="#">View Assignment</a>	<a href="#">Payment Layout</a> <a href="#">View Assignment</a>	
Alternative Payment Method	<a href="#">Alternative Payment Method Layout</a> <a href="#">View Assignment</a>	<a href="#">Operating Hours Layout</a> <a href="#">View Assignment</a>	<a href="#">Opportunity Layout</a> <a href="#">View Assignment</a>	<a href="#">Opportunity Product Layout</a> <a href="#">View Assignment</a>	<a href="#">Order Layout</a> <a href="#">View Assignment</a>	<a href="#">Order Product Layout</a> <a href="#">View Assignment</a>	<a href="#">Payment Layout</a> <a href="#">View Assignment</a>	<a href="#">Payment Layout</a> <a href="#">View Assignment</a>	<a href="#">Payment Layout</a> <a href="#">View Assignment</a>	<a href="#">Payment Layout</a> <a href="#">View Assignment</a>	
Appointment Invitation	<a href="#">Appointment Invitation Layout</a> <a href="#">View Assignment</a>	<a href="#">Opportunity Layout</a> <a href="#">View Assignment</a>	<a href="#">Opportunity Product Layout</a> <a href="#">View Assignment</a>	<a href="#">Order Layout</a> <a href="#">View Assignment</a>	<a href="#">Order Product Layout</a> <a href="#">View Assignment</a>	<a href="#">Payment Layout</a> <a href="#">View Assignment</a>	<a href="#">Payment Layout</a> <a href="#">View Assignment</a>	<a href="#">Payment Layout</a> <a href="#">View Assignment</a>	<a href="#">Payment Layout</a> <a href="#">View Assignment</a>	<a href="#">Payment Layout</a> <a href="#">View Assignment</a>	
Asset	<a href="#">Asset Layout</a> <a href="#">View Assignment</a>	<a href="#">Opportunity Layout</a> <a href="#">View Assignment</a>	<a href="#">Opportunity Product Layout</a> <a href="#">View Assignment</a>	<a href="#">Order Layout</a> <a href="#">View Assignment</a>	<a href="#">Order Product Layout</a> <a href="#">View Assignment</a>	<a href="#">Payment Layout</a> <a href="#">View Assignment</a>	<a href="#">Payment Layout</a> <a href="#">View Assignment</a>	<a href="#">Payment Layout</a> <a href="#">View Assignment</a>	<a href="#">Payment Layout</a> <a href="#">View Assignment</a>	<a href="#">Payment Layout</a> <a href="#">View Assignment</a>	
Asset Action	<a href="#">Asset Action Layout</a> <a href="#">View Assignment</a>	<a href="#">Opportunity Layout</a> <a href="#">View Assignment</a>	<a href="#">Opportunity Product Layout</a> <a href="#">View Assignment</a>	<a href="#">Order Layout</a> <a href="#">View Assignment</a>	<a href="#">Order Product Layout</a> <a href="#">View Assignment</a>	<a href="#">Payment Layout</a> <a href="#">View Assignment</a>	<a href="#">Payment Layout</a> <a href="#">View Assignment</a>	<a href="#">Payment Layout</a> <a href="#">View Assignment</a>	<a href="#">Payment Layout</a> <a href="#">View Assignment</a>	<a href="#">Payment Layout</a> <a href="#">View Assignment</a>	
Asset Action Source	<a href="#">Asset Action Source Layout</a> <a href="#">View Assignment</a>	<a href="#">Opportunity Layout</a> <a href="#">View Assignment</a>	<a href="#">Opportunity Product Layout</a> <a href="#">View Assignment</a>	<a href="#">Order Layout</a> <a href="#">View Assignment</a>	<a href="#">Order Product Layout</a> <a href="#">View Assignment</a>	<a href="#">Payment Layout</a> <a href="#">View Assignment</a>	<a href="#">Payment Layout</a> <a href="#">View Assignment</a>	<a href="#">Payment Layout</a> <a href="#">View Assignment</a>	<a href="#">Payment Layout</a> <a href="#">View Assignment</a>	<a href="#">Payment Layout</a> <a href="#">View Assignment</a>	
Asset Relationship	<a href="#">Asset Relationship Layout</a> <a href="#">View Assignment</a>	<a href="#">Opportunity Layout</a> <a href="#">View Assignment</a>	<a href="#">Opportunity Product Layout</a> <a href="#">View Assignment</a>	<a href="#">Order Layout</a> <a href="#">View Assignment</a>	<a href="#">Order Product Layout</a> <a href="#">View Assignment</a>	<a href="#">Payment Layout</a> <a href="#">View Assignment</a>	<a href="#">Payment Layout</a> <a href="#">View Assignment</a>	<a href="#">Payment Layout</a> <a href="#">View Assignment</a>	<a href="#">Payment Layout</a> <a href="#">View Assignment</a>	<a href="#">Payment Layout</a> <a href="#">View Assignment</a>	

## 4. Permission Sets

Permission Sets are used to give extra access without changing the profile.

### 4.1 Create a Permission Set

1. Setup → Permission Sets → **New Permission Set**
2. Label: **Visitor Admin Access**
3. License: Salesforce
4. Save



## 4.2 Add Permissions

- Modify All on Visitor Object
- Manage Reports
- Manage Dashboards

## 4.3 Assign Permission Set

Assign to admin-level users who need advanced access.

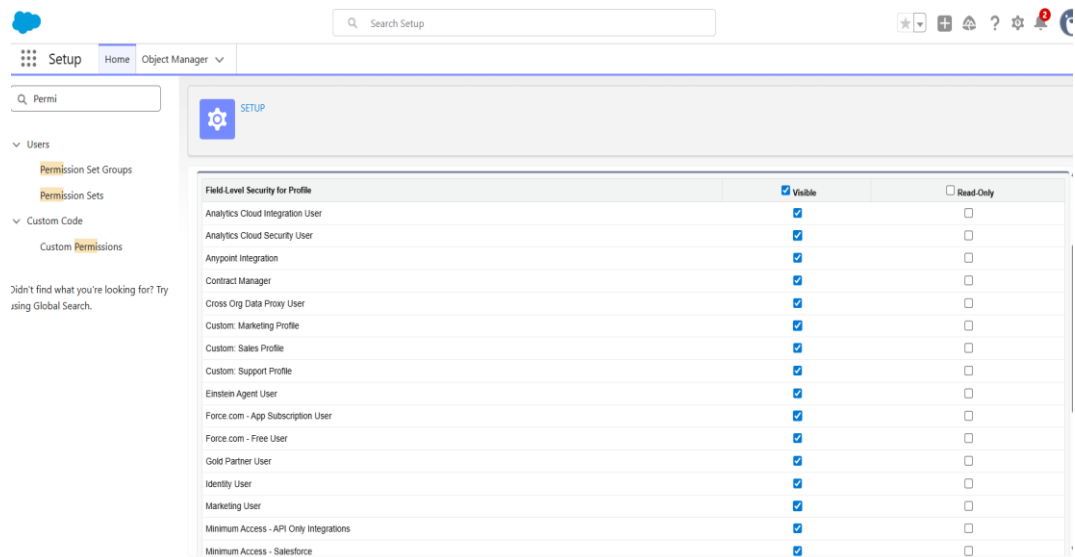
## 5. Field-Level Security (FLS)

FLS controls which fields are visible or editable.

### 5.1 Configure Field Access

1. Go to Object Manager → Visitor → Fields & Relationships
2. Select each field → Set Field-Level Security
3. Make sure:
  - ID Proof Number = Visible but not editable for standard users

- Check-In Time = Read-only for standard users
- Check-Out Time = Read-only for standard users

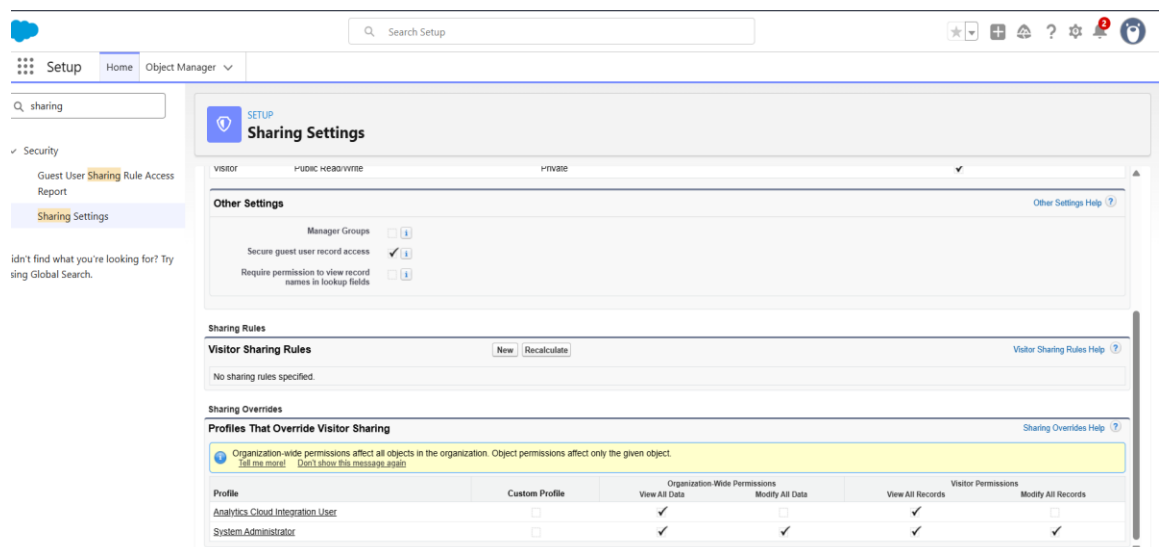


## 6. Organization-Wide Defaults (OWD)

Defines default record visibility.

### 6.1 Steps

1. Setup → Sharing Settings
2. Visitor Object → Change to:
  - Private or Public Read Only



## 6.2 Meaning

- Private → Only record owner and admin can see the record
- Public Read Only → Everyone can see but only owner can edit

Set according to your project requirement.

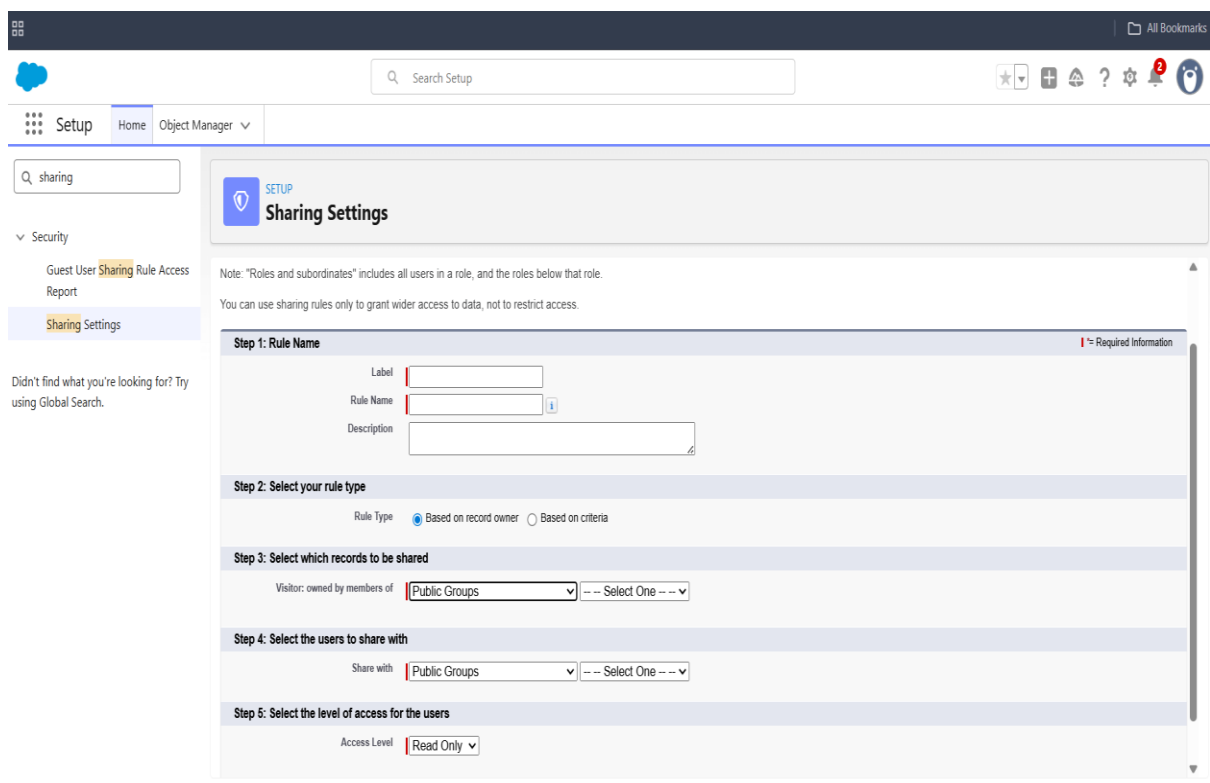
## 7. Sharing Rules

If OWD is Private, you must create sharing rules.

### 7.1 Example Sharing Rule

Goal: Allow Receptionists to view all visitor records.

1. Setup → Sharing Settings
2. Visitor Object → New Sharing Rule
3. Based on: Record Owner or Criteria
4. Share with: Public Group – Reception Team
5. Access Level: Read Only



The screenshot shows the Salesforce Setup interface. The left sidebar contains the navigation menu with 'Setup' selected. 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 page is divided into five steps for creating a sharing rule:

- Step 1: Rule Name** (Required Information): Includes fields for Label, Rule Name, and Description.
- Step 2: Select your rule type**: Includes a 'Rule Type' section with radio buttons for 'Based on record owner' (selected) and 'Based on criteria'.
- Step 3: Select which records to be shared**: Includes a 'Visitor: owned by members of' dropdown menu with 'Public Groups' selected and a '--- Select One ---' button.
- Step 4: Select the users to share with**: Includes a 'Share with' dropdown menu with 'Public Groups' selected and a '--- Select One ---' button.
- Step 5: Select the level of access for the users**: Includes an 'Access Level' dropdown menu with 'Read Only' selected.

## 8. Login Access Policies

Set security for login:

- Enable Two-Factor Authentication for Admin
- Restrict login times for standard users
- Restrict login IP ranges (optional)

Screenshot Placeholder: Login access settings

## 9. Testing Phase 5 Security

Create two test users:

### User A – Reception User (Limited Access)

- Should see Visitor records
- Cannot edit restricted fields
- Cannot delete records

User B – Admin User

- Full access
- Can manage dashboards, reports, visitors

## 10. Summary

Phase 5 ensures your Visitor Management CRM is **secure and role-based**, with:

- ✓ Correct profiles
- ✓ Permission sets
- ✓ Field-level security
- ✓ OWD and sharing rules
- ✓ Controlled user access