

Phase 6: Profile & Permission Set Configuration

Visitor Management System – Salesforce CRM Project

6.1 Objective

The purpose of Phase 6 is to control who can access what in your Visitor Management System using:

- Profiles
- Permission Sets

This ensures:

- ✓ Data security
- ✓ Controlled access
- ✓ Separation between Admin and User roles

6.2 Tasks Completed in Phase 6

6.3 Create Permission Set (Extended Visitor Access)

This is used when user needs extra permissions without editing their whole profile.

Steps:

1. Setup → Permission Sets
2. New
3. Enter:
 - Label: Visitor Extended Access
 - License: Salesforce
4. Save

Add Object Access

- Go to Object Settings
- Choose Visitor

- Give:
 - Read
 - Create
 - Edit

This is useful for temporary users.

Description	License	Salesforce	API Name	Namespace Prefix
Session Activation Required	<input type="checkbox"/>		Created By Kalyani Kapoola	12/9/2025, 9:56 AM
Permission Set Groups Added To	0		Last Modified By Kalyani Kapoola	12/9/2025, 9:56 AM

6.4 Assign Profile and Permission Sets to Users

Steps:

1. Setup → Users
2. Click on the User (front-desk employee)
3. Change Profile → Visitor User Profile
4. Scroll down → Permission Set Assignments
5. Add → Visitor Extended Access
6. Save

6.5 Field-Level Security Configuration

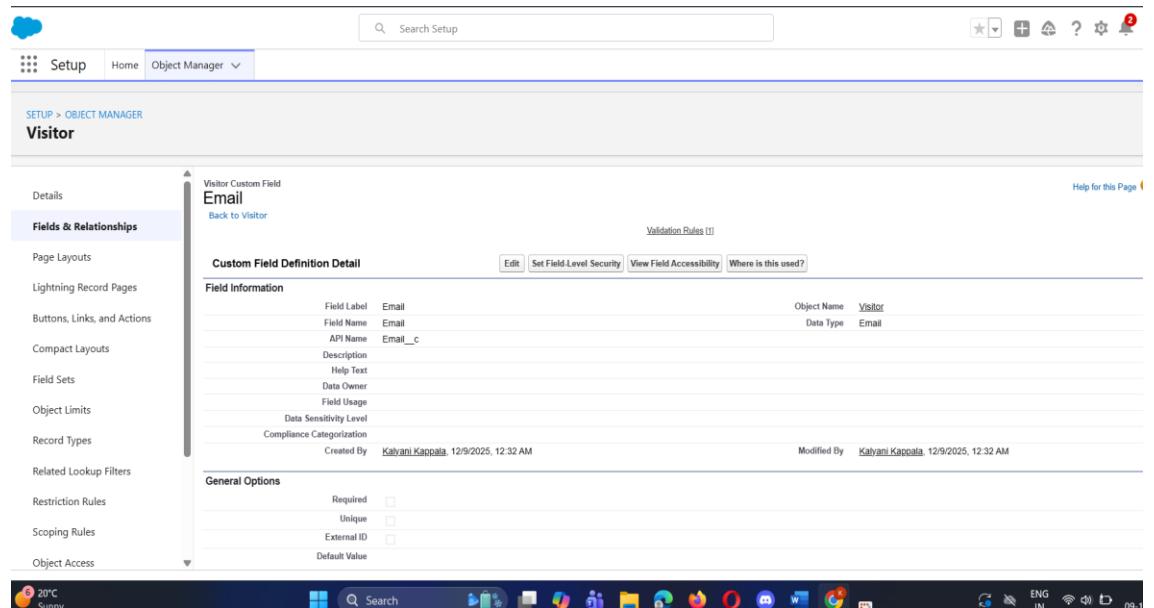
For each important field:

Field	Visibility	Editable
Visitor Name	Visible	Yes
Phone Number	Visible	Yes
Email	Visible	Yes

ID Proof Type	Visible	Yes
Check-In Time	Visible	Yes
Check-Out Time	Visible	Yes
Host (Lookup)	Visible	Yes

Steps:

1. Go to Object Manager → Visitor
2. Fields & Relationships
3. Open field → Set Field Level Security
4. Check:
 - o Visible
 - o Editable (if required)



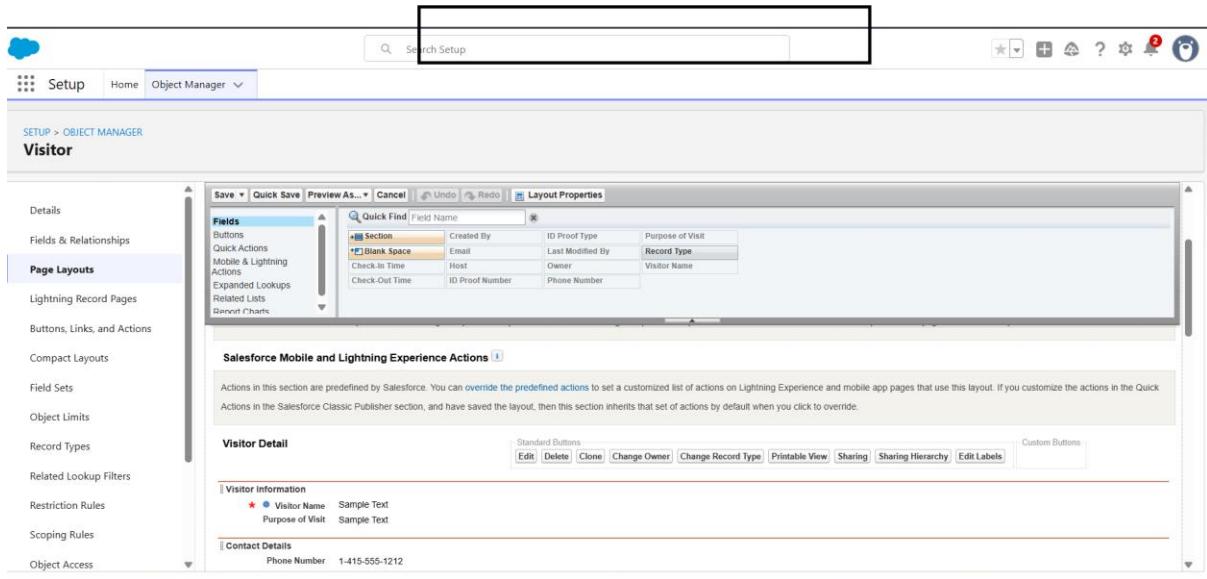
6.6 Page Layout Assignment

For Visitor Object Page Layout:

1. Object Manager → Visitor
2. Page Layouts
3. Choose Visitor Layout
4. Assign to:
 - o Visitor User Profile
 - o System Administrator

Ensure fields appear in correct order:

- Visitor Details
- Contact Details
- Visit Purpose
- Check-In/Check-Out Info
- Host Details



6.7 Summary of Phase 6

In this phase, the following were successfully configured:

- ✓ Custom Profile created (Visitor User Profile)
- ✓ Permission Set created (Visitor Extended Access)
- ✓ Object-level access defined
- ✓ Field-level security applied
- ✓ Users assigned proper access
- ✓ Page layouts mapped with profiles

This ensures secure and structured usage of your Visitor Management System.