

SFC-MOD-3-ASSIGNMENT-1

Problem Statement:

Sam is an experienced CRM leader who has recently joined Stark Corp as a Sales Executive. He also has a marketing background and reports directly to the CEO. He needs access to various objects and apps in Salesforce. Salesforce provides three layers of security with lots of flexibility to accommodate virtually any business need. Profiles control object-level and field-level access. Permission sets are used to provide access to additional objects. Field-level security controls provide access to individual fields within an object. Further, there are five types of record-level security: Org wide Defaults, Role Hierarchy Sharing, Sharing rules, Manual sharing, and Apex-based Sharing. These five-control record-level security provides access to sets of records, or even to an individual record, for people who do not own those records.

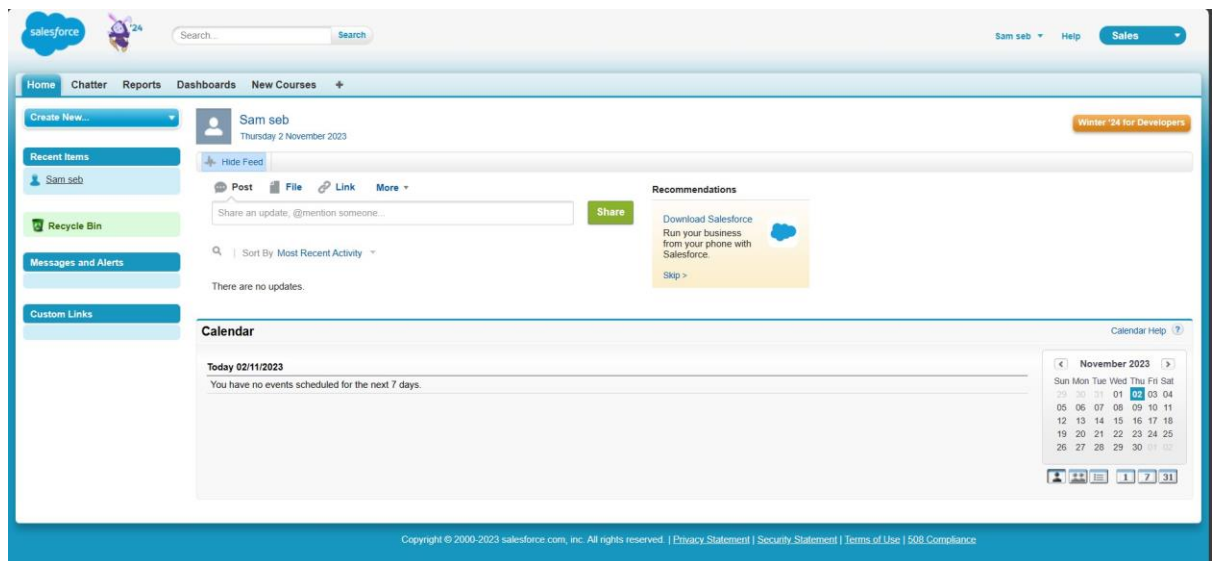
The screenshot shows the 'Users' section in the Salesforce Setup menu. The user 'Sam seb' is selected, and the 'User Detail' tab is active. The user's role is 'Sales Executive'. The user's email is 'sayadreshma1217@gmail.com' and the username is 'sseb@1217.com'. The user is active. The user's nickname is 'User16989032596639974128'. The user's title is 'Marketing User'. The user's company is 'Offline User'. The user's department is 'Knowledge User'. The user's division is 'Flow User'. The user's address is 'Service Cloud User'. The user's time zone is '(GMT+05:30) India Standard Time (Asia/Kolkata)'. The user's locale is 'English (India)'. The user's language is 'English'. The user's currency is 'INR - Indian Rupee'. The user's delegated approver is 'Manager'. The user's manager is 'Only if I am an approver'. The user's federation ID is 'Load Lightning Pages While Scrolling'.

Field	Value
Name	Sam seb
Alias	sseb
Email	sayadreshma1217@gmail.com [Verified]
Username	sseb@1217.com
Nickname	User16989032596639974128
Title	Marketing User
Company	Offline User
Department	Knowledge User
Division	Flow User
Address	Service Cloud User
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale	English (India)
Language	English
Currency	INR - Indian Rupee
Delegated Approver	Manager
Manager	Only if I am an approver
Federation ID	Load Lightning Pages While Scrolling

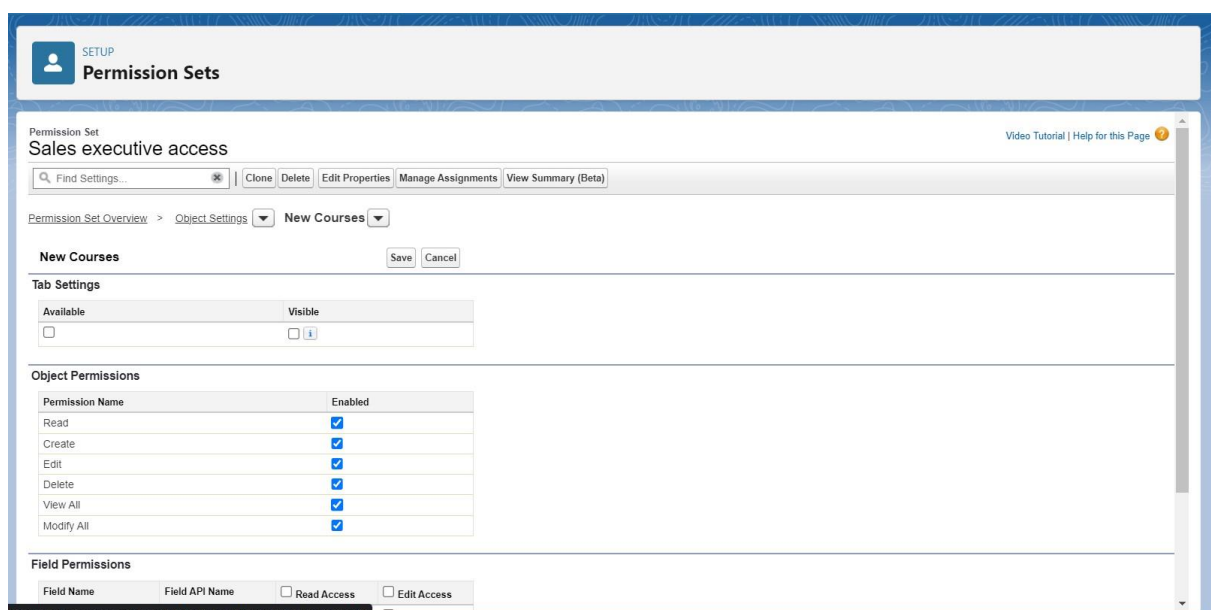
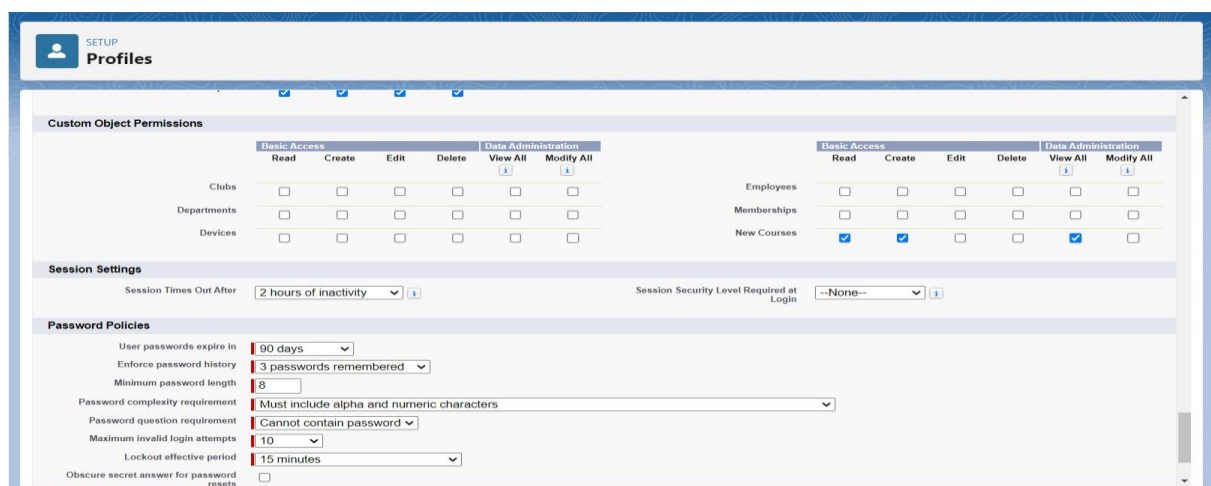
The screenshot shows the 'Profiles' section in the Salesforce Setup menu. The 'All Profiles' tab is active. The table lists various profiles and their associated user licenses. The profiles are: B2B Reordering Portal Buyer Profile, CUSTOM_SU, CUSTOM_SPU, JSR_PROFILE, LEGAL_PROFILE, Sales Executives 1, Sales Executive, Sales Reps, Read Only, Custom Marketing Profile, Custom Support Profile, System Administrator, Chatter Free User, Analytics Cloud Integration User, and Analytics Cloud Security User. The user licenses are: External Apps Login, Salesforce, Salesforce Platform, XOrg Proxy User, Identity, Salesforce, Salesforce, Salesforce, Salesforce, Salesforce, Chatter Free, Analytics Cloud Integration User, and Analytics Cloud Integration User.

Action	Profile Name	User License	Custom
Edit Del ...	B2B Reordering Portal Buyer Profile	External Apps Login	✓
Edit Del ...	CUSTOM_SU	Salesforce	✓
Edit Del ...	CUSTOM_SPU	Salesforce Platform	✓
Edit Del ...	JSR_PROFILE	Salesforce Platform	✓
Edit Del ...	LEGAL_PROFILE	Salesforce Platform	✓
Edit Del ...	Sales Executives 1	XOrg Proxy User	✓
Edit Del ...	Sales Executive	Identity	✓
Edit Del ...	Sales Reps	Identity	✓
Edit Del ...	Read Only	Salesforce	✓
Edit Del ...	Custom Marketing Profile	Salesforce	✓
Edit Del ...	Custom Support Profile	Salesforce	✓
Edit Clone	System Administrator	Salesforce	
Edit Clone	Chatter Free User	Chatter Free	
Edit Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	
Edit Clone	Analytics Cloud Security User	Analytics Cloud Integration User	

1. Provide object-level security:
 - a. Verify that a user has permissions to see objects of a particular type.



- b. Manage the object-level access through profiles and permission sets.



SETUP **Permission Sets**

Permission Set **Sales executive access** [Video Tutorial](#) | [Help for this Page](#)

Find Settings... Clone Delete Edit Properties Manage Assignments View Summary (Beta)

Permission Set Overview > Object Settings **New Courses**

New Courses [Edit](#)

Tab Settings

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

Object Permissions

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

Field Permissions

Field Name	Field API Name	Read Access	Edit Access
Course Name	Course_Name__c	<input type="checkbox"/>	<input type="checkbox"/>

SETUP **Sales executive access**

Current Assignments [Add Assignment](#)

<input type="checkbox"/>	Full Name ↑	Active	Role	Profile	User License	Expires On
<input type="checkbox"/>	Sam seb	✓	Sales Executive	Sales Executive	Identity	

2. Even if Sam has access to objects, he still needs access to individual fields of each object. In Salesforce, profiles also control field-level access.
 - a. Provide field-level access to Sam.

SETUP

New Course Field-Level Security for profile **Sales Executive** [Help for this Page](#)

[Edit](#) [Back to Profile](#)

Field Name	Field Type	Read Access	Edit Access
Course Name	Text	✓	<input type="checkbox"/>
Created By	Lookup	✓	<input type="checkbox"/>
Currency	Picklist	✓	✓
Last Modified By	Lookup	✓	<input type="checkbox"/>
New Course Name	Auto Number	✓	<input type="checkbox"/>
Owner	Lookup	✓	✓

[Edit](#) [Back to Profile](#)

3. With just object-level access and field-level access, Sam can only access records he owns (i.e., records created by him).

The screenshot shows the 'Sharing Settings' page in Salesforce. The page is divided into two main sections: 'Sharing Settings' and 'Other Settings'.

Sharing Settings:

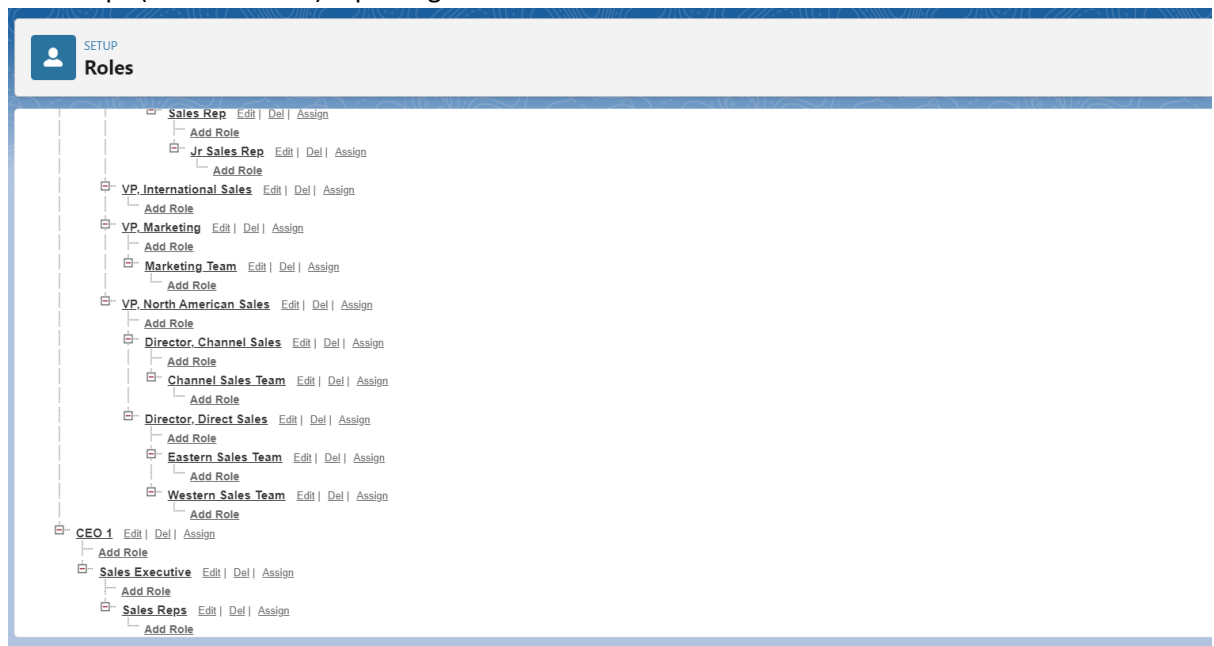
Object	Private	Public Read/Write	Private	Public Read/Write
Service Contract	Private	Public Read/Write	Private	Public Read/Write
Service Resource	Private	Public Read/Write	Private	Public Read/Write
Service Territory	Private	Public Read/Write	Private	Public Read/Write
Shift	Private	Public Read/Write	Private	Public Read/Write
Streaming Channel	Private	Public Read/Write	Private	Public Read/Write
Waitlist	Private	Public Read/Write	Private	Public Read/Write
Web Cart Document	Private	Public Read/Write	Private	Public Read/Write
Work Order	Private	Public Read/Write	Private	Public Read/Write
Work Plan	Private	Public Read/Write	Private	Public Read/Write
Work Plan Template	Private	Public Read/Write	Private	Public Read/Write
Work Step Template	Private	Public Read/Write	Private	Public Read/Write
Work Type	Private	Public Read/Write	Private	Public Read/Write
Work Type Group	Private	Public Read/Write	Private	Public Read/Write
Club	Private	Public Read/Write	Private	Public Read/Write
Department	Private	Public Read/Write	Private	Public Read/Write
Employee	Private	Public Read/Write	Private	Public Read/Write
New Course	Private	Public Read/Write	Private	Public Read/Write

Other Settings:


- Standard Report Visibility ☒
- Manual User Record Sharing ☐
- Manager Groups ☐
- Secure guest user record access ☐
- Require permission to view record names in lookup fields ☐

Buttons: Save, Cancel

- a. If you look at the organizational structure, he reports to Zeck (the CEO), and he has two Sales Reps (Jane and John) reporting to him. Show the same.



b. Provide record-level security to Sam.

 **SETUP**

Sharing Settings

Work Type Sharing Rules

[New](#) [Recalculate](#)

[Work Type Sharing Rules Help ?](#)

No sharing rules specified.

Work Type Group Sharing Rules

[New](#) [Recalculate](#)

[Work Type Group Sharing Rules Help ?](#)

No sharing rules specified.

Club Sharing Rules

[New](#) [Recalculate](#)

[Club Sharing Rules Help ?](#)

No sharing rules specified.

Department Sharing Rules

[New](#) [Recalculate](#)

[Department Sharing Rules Help ?](#)

No sharing rules specified.

Employee Sharing Rules

[New](#) [Recalculate](#)

[Employee Sharing Rules Help ?](#)

No sharing rules specified.

New Course Sharing Rules

[New](#) [Recalculate](#)

[New Course Sharing Rules Help ?](#)

Action	Criteria	Shared With	Access Level
Edit Del	New Course: Currency EQUALS INR	All Internal Users	Read Only
Edit Del	Owner in Role: Sales Executive	All Internal Users	Read Only