

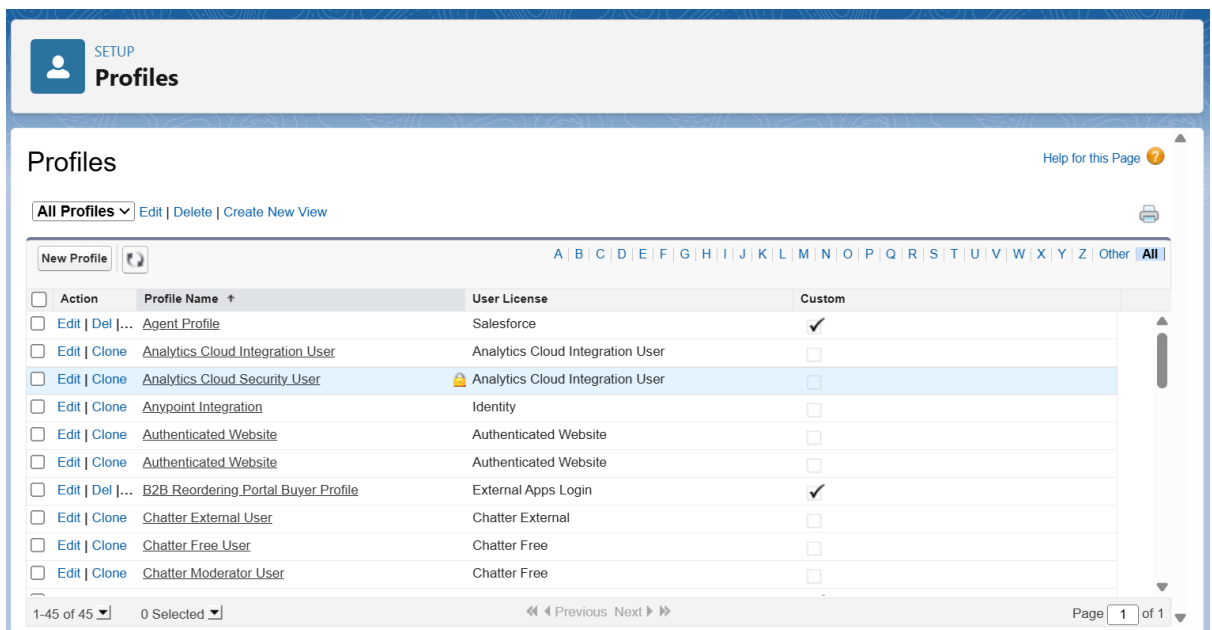
Phase 9: Security, Access, and User Management

1. Profiles & Permission Sets

Purpose: Control user access to objects, fields, and features.

Steps Performed:

1. Navigate to **Setup** → **Profiles**.
2. Configure **Manager**, **Agent**, and **Customer** profiles:
 - Assign object-level and field-level permissions for **Policy**, **Claim**, and **Agent** objects.
 - Set access to tabs and apps based on roles.
3. Use **Permission Sets** to grant additional permissions beyond profiles as needed.



Action	Profile Name	User License	Custom
Edit Del ...	Agent Profile	Salesforce	<input checked="" type="checkbox"/>
Edit Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
Edit Clone	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
Edit Clone	Anypoint Integration	Identity	<input type="checkbox"/>
Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
Edit Del ...	B2B Reordering Portal Buyer Profile	External Apps Login	<input checked="" type="checkbox"/>
Edit Clone	Chatter External User	Chatter External	<input type="checkbox"/>
Edit Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
Edit Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>

2. Roles & Role Hierarchy

Purpose: Ensure proper record-level access based on organizational hierarchy.

Steps Performed:

1. Navigate to **Setup** → **Roles**.
2. Create roles such as **Manager**, **Agent**, **Customer Service**.
3. Define hierarchy so that managers can see records owned by their subordinates.
4. Assign users to appropriate roles.

[illegible]

4. Login & Authentication Settings

Purpose: Ensure secure access to Salesforce.

Steps Performed:

1. Navigate to **Setup** → **Session Settings** and **Login Access Policies**.
2. Enable IP restrictions or trusted IP ranges if required.
3. Optionally configure **Two-Factor Authentication (2FA)** for added security.

The screenshot shows the 'Session Settings' page in Salesforce Setup. The page title is 'Session Settings' with a 'Help for this Page' link. Below the title is a description: 'Set the session security and session expiration timeout for your organization.' The main content area is divided into two sections: 'Session Timeout' and 'Session Settings'. In the 'Session Timeout' section, there is a 'Timeout Value' dropdown set to '2 hours', a checkbox for 'Disable session timeout warning popup' (unchecked), and a checkbox for 'Force logout on session timeout' (checked). The 'Session Settings' section contains several checkboxes: 'Lock sessions to the IP address from which they originated' (unchecked), 'Lock sessions to the domain in which they were first used' (checked), 'Terminate all of a user's sessions when an admin resets that user's password' (unchecked), 'Force relogin after Login-As-User' (checked), 'Require HttpOnly attribute' (unchecked), 'Use POST requests for cross-domain sessions' (unchecked), 'Enforce login IP ranges on every request' (unchecked), and 'When embedding a Lightning application in a third-party site, use a session token instead of a session cookie' (unchecked). At the bottom of the page, there is a note: 'Extended use of IE11 with Lightning Experience'.

5. User Management

Purpose: Manage creation, activation, and roles of users in Salesforce.

Steps Performed:

1. Navigate to **Setup** → **Users**.
2. Create users for **Managers, Agents, and Customers**.
3. Assign appropriate **Profile, Role, and License**.
4. Verify login access and permissions.

The screenshot shows the 'Login Access Policies' page in Salesforce Setup. The page title is 'Login Access Policies' with a 'Help for this Page' link. Below the title is a description: 'Control which support organizations your users can grant login access to.' The main content area is a table titled 'Manage Support Options' with 'Save' and 'Cancel' buttons. The table has four columns: 'Setting', 'Packages', 'Available to Users', and 'Available to Administrators Only'. The first row shows the setting 'Administrators Can Log in as Any User' with a checkbox that is checked. The second row shows the support organization 'Salesforce.com Support' with a radio button selected under 'Available to Users' and an empty radio button under 'Available to Administrators Only'. At the bottom of the table, there are 'Save' and 'Cancel' buttons.

