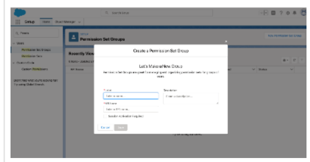
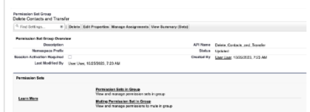
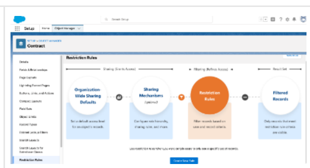
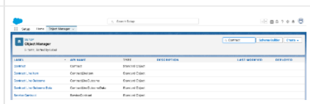
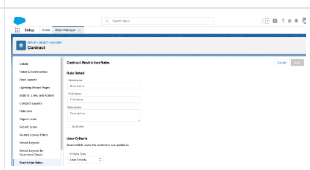
Workshop - Permission Set Groups and Restriction Rules

⚙️ Setup

As an admin you need to give a user the ability to delete both leads and contacts and also to transfer leads.
Let’s accomplish this with Permission Set Groups

📜 Instructions

Instructions	Screenshot
In the 'Quick Find' box of the Setup screen, search for 'Permission' and click **Permission Sets** A few permission sets have been created for this exercise to delete contacts and leads	
Click **Permission Set Groups** Click **New Permission Set Group** Enter a name, e.g. **Delete Contacts and Transfer** Click **Save**	
Click **Permission Sets in Group**	
Click **Add Permission Set** Select **Delete Contacts** and **Delete Lead** Click **Add** Click **Done**	
You've now create a Permission Set Group which combines multiple permission sets and allows for easy assignment to users. Permission Set Groups fill the gap between monolithic Profiles and atomistic Permission Sets.	
Speaking about giving you more controlled access to data, we have very cool new feature called Restriction Rules. Restriction rules let you control which records a specific group of users are permitted to see. When a restriction rule is applied to a user, the data that the user has access to via org-wide defaults, sharing rules, and other sharing mechanisms is filtered by the record criteria that you specify. You can create up to 2 active rules.	
Click **Object Manager** In the Quick Find box Enter **Contract** Click **Contract**	
Click **Restriction Rules** Click **ChicagoContract** For example, if Sales users navigate to the Contracts they see only the records with term set to 12 months per the restriction rule’s criteria. If a user has a link to a record that is no longer accessible after a restriction rule is applied, the user sees an error message	

Restriction Rules enhance the security of our Salesforce org by allowing users to access only specified records. Restriction rules are available for custom objects, contracts, tasks, events, time sheets, and time sheet entries. Restriction rules in Salesforce are great enhancement, providing the ability to further restrict the data access as needed