



SCENARIO-BASED QUESTIONS ABOUT SECURITY IN SALESFORCE

BY-SUDARSHAN KHARDE

EMAIL-KHARDESUDARSHAN02@GMAIL.COM





1) YOU HAVE TWO USERS, ONE FROM THE SALES TEAM AND ONE FROM THE MARKETING TEAM. BOTH NEED ACCESS TO THE SAME ACCOUNT BUT MUST SEE DIFFERENT FIELDS. HOW WOULD YOU CONFIGURE THIS IN SALESFORCE?

PROFILES: CREATE SEPARATE PROFILES FOR SALES AND MARKETING TEAMS.

FIELD-LEVEL SECURITY: SET FIELD VISIBILITY BASED ON THE PROFILES.

PAGE LAYOUTS: ASSIGN DIFFERENT PAGE LAYOUTS TO EACH PROFILE TO ENSURE USERS ONLY SEE RELEVANT FIELDS.

SHARING RULES: USE SHARING RULES TO ENSURE BOTH TEAMS HAVE ACCESS TO THE SAME ACCOUNT RECORDS BUT WITH PROPER FIELD-LEVEL RESTRICTIONS.



2) A MANAGER NEEDS TO SEE ALL THE OPPORTUNITIES OWNED BY THEIR TEAM MEMBERS, BUT INDIVIDUAL TEAM MEMBERS SHOULD ONLY SEE THEIR OWN RECORDS. HOW WOULD YOU CONFIGURE THE SHARING MODEL?

ANSWER:

- **ORGANIZATION-WIDE DEFAULTS (OWD): SET OPPORTUNITIES TO "PRIVATE."**
- **ROLE HIERARCHY: ENSURE THE MANAGER IS PLACED HIGHER IN THE ROLE HIERARCHY SO THEY INHERIT ACCESS TO THEIR TEAM'S OPPORTUNITIES.**
- **SHARING RULES: IF ADDITIONAL ACCESS IS REQUIRED (E.G., CROSS-TEAM SHARING), CONFIGURE SHARING RULES FOR SPECIFIC GROUPS OR ROLES.**



3) A NEW USER IS UNABLE TO ACCESS A CUSTOM OBJECT, EVEN THOUGH THEY HAVE THE SAME PROFILE AS THEIR PEERS. WHAT COULD BE THE ISSUE?

ANSWER:

- **CHECK PERMISSION SETS: VERIFY IF THE USER HAS BEEN ASSIGNED ALL THE NECESSARY PERMISSION SETS THAT PROVIDE ACCESS TO THE OBJECT.**
- **RECORD-LEVEL SECURITY: ENSURE THE USER HAS ACCESS TO THE RECORDS VIA SHARING RULES OR MANUAL SHARING.**
- **PROFILE COMPARISON: DOUBLE-CHECK IF THE PROFILES ARE TRULY IDENTICAL, ESPECIALLY OBJECT-LEVEL PERMISSIONS.**



4)YOU NEED TO TEMPORARILY GRANT A USER ACCESS TO A SPECIFIC FEATURE OR RECORD WITHOUT MODIFYING THEIR PROFILE. WHAT WOULD YOU DO?

ANSWER:

- **USE PERMISSION SETS: ASSIGN A TEMPORARY PERMISSION SET THAT GRANTS THE REQUIRED ACCESS TO THE USER.**
- **MANUAL SHARING: SHARE THE RECORD MANUALLY WITH THE USER IF IT'S A SPECIFIC RECORD THEY NEED.**
- **MONITOR ACCESS: REMOVE THE PERMISSION OR REVOKE ACCESS ONCE THE TASK IS COMPLETED.**

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5)THE ADMIN TEAM NEEDS TO MONITOR AND RESTRICT WHO CAN EXPORT DATA FROM SALESFORCE. HOW WOULD YOU ADDRESS THIS?

ANSWER:

- **PROFILE SETTINGS: DISABLE "EXPORT REPORTS" AND "DATA EXPORT" PERMISSIONS ON PROFILES.**
- **PERMISSION SETS: ASSIGN THE DATA EXPORT PERMISSION ONLY TO AUTHORIZED USERS.**
- **EVENT MONITORING: USE EVENT MONITORING TO TRACK DATA EXPORTS VIA REPORTS OR APIS.**

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THANK YOU
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