



Module 3: Security and Access 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: Orgwide 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.

Tasks To Be Performed:

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