

Data Model Assignment

1. Provide an Object-level-security

- a. Verify that the user has permissions to see objects of the particular type

Ans: User have the object permission of particular type of standard and custom object I am attaching the screenshot.

The screenshot shows the 'Profiles' setup page with a 'Standard Object Permissions' table. The table is divided into two columns of objects, each with a 'Basic Access' section (Read, Create, Edit, Delete) and a 'Data Administration' section (View All, Modify All). The 'Accounts' and 'Addresses' rows are highlighted in yellow.

| | Basic Access | | | | Data Administration | |
|-----------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|
| | Read | Create | Edit | Delete | View All | Modify All |
| Accounts | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Account Brands | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Addresses | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| AI Insight Reasons | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| AI Metadata Sync Statuses | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| AI Record Insights | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Alternative Payment Methods | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| API Anomaly Event Stores | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| App Analytics Query Requests | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Application Usage Assignments | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Appointment Categories | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Appointment Invitations | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Appointment Schedule Aggregates | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Appointment Schedule Logs | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Appointment Topic Time Slots | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Archive Job Sessions | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Associates | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Invoices | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Labels | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Leads | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Legal Entities | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Locations | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Location Groups | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Location Group Assignments | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Location Shipping Carrier Methods | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Macros | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Messaging Sessions | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Messaging Users | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Operating Hours | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Opportunities | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Orders | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Partner Fund Allocations | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Partner Fund Claims | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Partner Fund Disbursements | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

The screenshot shows the 'Profiles' setup page with 'Custom Object Permissions' and 'Platform Event Permissions' sections. The 'Custom Object Permissions' table has columns for 'Basic Access' (Read, Create, Edit, Delete) and 'Data Administration' (View All, Modify All). The 'Platform Event Permissions' section has columns for 'Basic Access' (Read, Create). The 'Session Settings' section is at the bottom.

| | Basic Access | | | | Data Administration | |
|--------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|
| | Read | Create | Edit | Delete | View All | Modify All |
| Bills | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Courses | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Course Leads | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Financial Accounts | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Man Powers | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Relationships | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Stations | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Subjects | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Supplies | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Technologies | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Users | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Wallets | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| New Courses | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

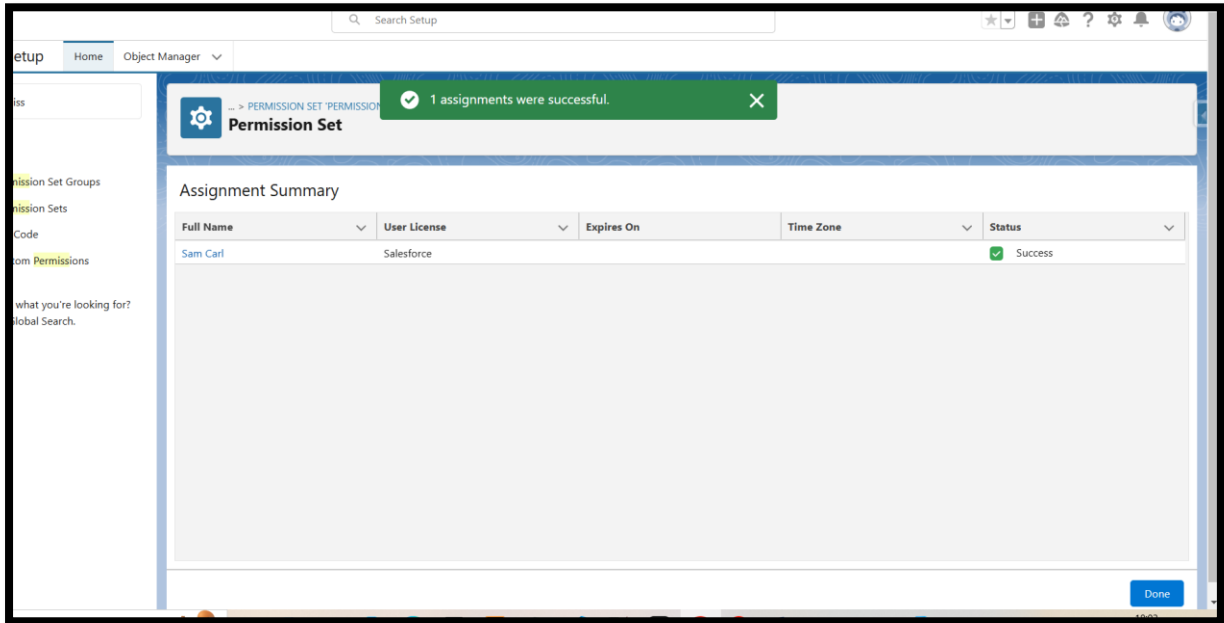
| | Basic Access | |
|--------|--------------------------|--------------------------|
| | Read | Create |
| paglis | <input type="checkbox"/> | <input type="checkbox"/> |

Session Settings

| | | | |
|--|--------------------------|--|--|
| Session Times Out After | 2 hours of inactivity | Session Security Level Required at Login | New Microsoft Word Macro-Enabled Document - Word (Product Activation Failed) |
| Separate Experience Cloud site and Salesforce login authentication for | <input type="checkbox"/> | | |

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

Ans: For Sam Carl we added extra permission using permission set and did the assignment successfully.

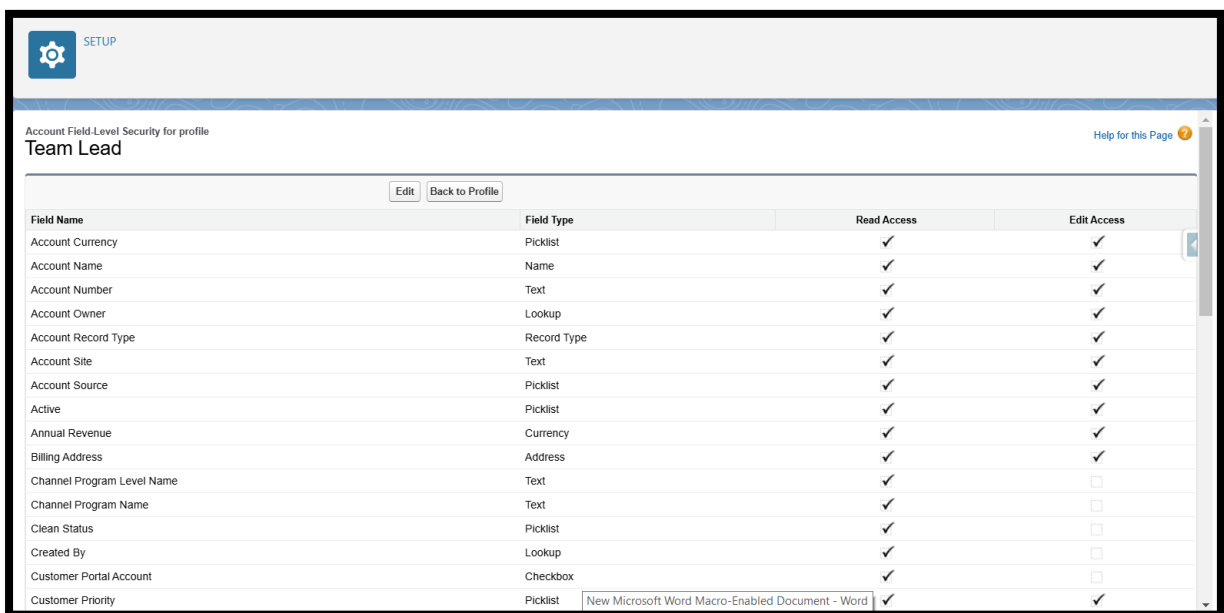


2. Even if Sam has access to objects, he still needs access to individual fields of each object. In Salesforce, profiles also control field-level access

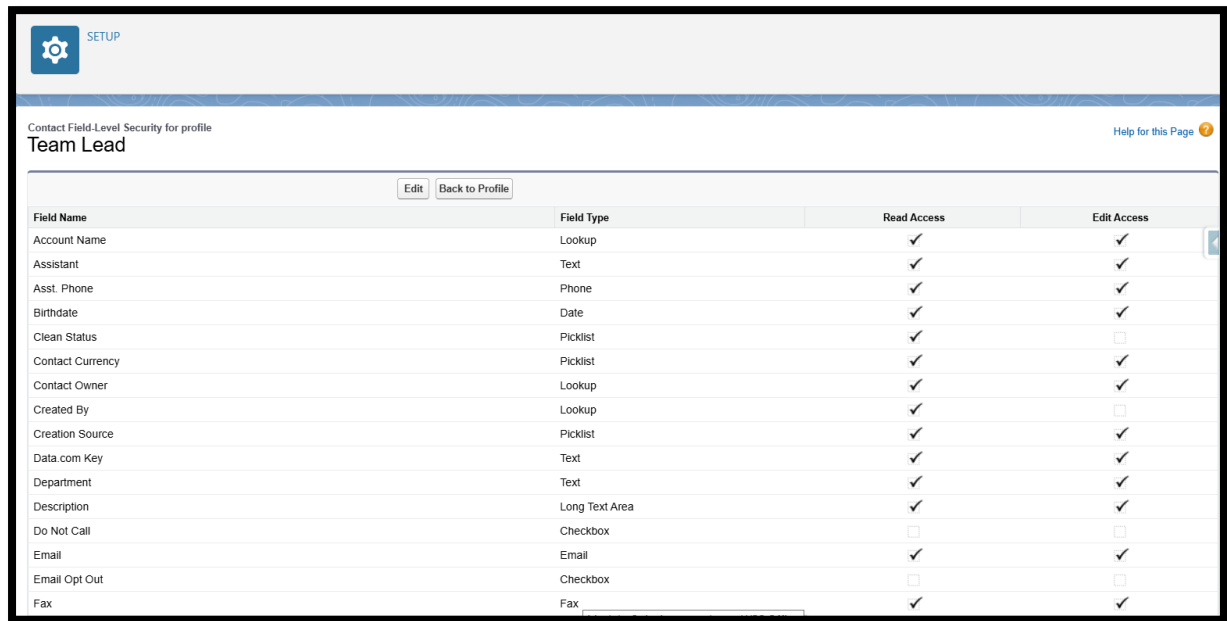
a. Provides field-level access to Sam

Ans: So here we will provide field level access to sam this can be done by Configure Field Accessibility via Profiles:

For Account Object and Fields



For Contact Object and Fields

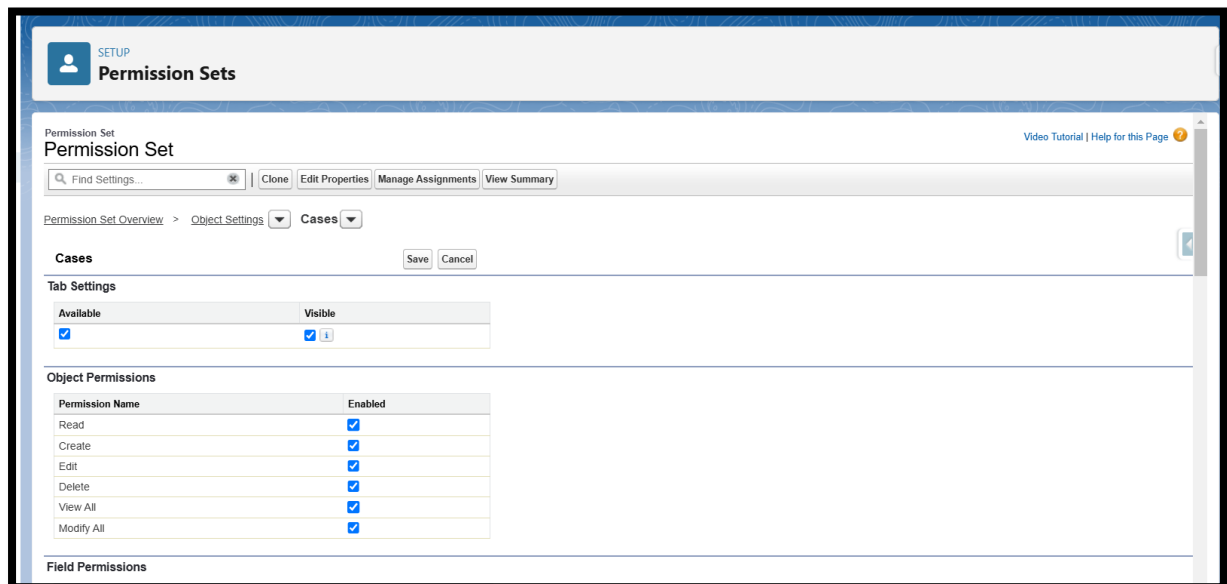


The screenshot shows the 'Contact Field-Level Security for profile Team Lead' page in Salesforce Setup. It includes a table with columns for Field Name, Field Type, Read Access, and Edit Access. The table lists various fields and their corresponding access levels for the 'Team Lead' profile.

| Field Name | Field Type | Read Access | Edit Access |
|------------------|----------------|--------------------------|--------------------------|
| Account Name | Lookup | ✓ | ✓ |
| Assistant | Text | ✓ | ✓ |
| Asst. Phone | Phone | ✓ | ✓ |
| Birthdate | Date | ✓ | ✓ |
| Clean Status | Picklist | ✓ | <input type="checkbox"/> |
| Contact Currency | Picklist | ✓ | ✓ |
| Contact Owner | Lookup | ✓ | ✓ |
| Created By | Lookup | ✓ | <input type="checkbox"/> |
| Creation Source | Picklist | ✓ | ✓ |
| Data.com Key | Text | ✓ | ✓ |
| Department | Text | ✓ | ✓ |
| Description | Long Text Area | ✓ | ✓ |
| Do Not Call | Checkbox | <input type="checkbox"/> | <input type="checkbox"/> |
| Email | Email | ✓ | ✓ |
| Email Opt Out | Checkbox | <input type="checkbox"/> | <input type="checkbox"/> |
| Fax | Fax | ✓ | ✓ |

So there is access for other objects and their fields also.

Provide Additional Field Access via Permission Sets (if needed): We can provide extra permission by making use of object setting in permission set.



The screenshot shows the 'Permission Sets' page in Salesforce Setup. It displays the 'Cases' object settings for a specific permission set. The 'Object Permissions' section shows that the 'Read', 'Create', 'Edit', 'Delete', 'View All', and 'Modify All' permissions are all enabled.

Permission Set

Find Settings... Clone Edit Properties Manage Assignments View Summary

Permission Set Overview > Object Settings Cases

Cases Save Cancel

Tab Settings

| Available | Visible |
|-------------------------------------|-------------------------------------|
| <input checked="" type="checkbox"/> | <input checked="" 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 |
|---------------------|------------------|-------------------------------------|-------------------------------------|
| Account Name | Accountid | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Asset | AssetId | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Business Hours | BusinessHoursId | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Case Currency | CurrencyIsoCode | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Case Number | CaseNumber | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Case Origin | Origin | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Case Owner | OwnerId | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Case Priority | Case_Priority__c | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Case Reason | Reason | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Case Source | SourceId | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Case Type | Case_Type__c | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Closed When Created | IsClosedOnCreate | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Contact Email | ContactEmail | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Contact Fax | ContactFax | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Contact Mobile | ContactMobile | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Contact Name | ContactId | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Contact Phone | ContactPhone | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Created | Created__c | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Created By | CreatedById | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Customer Type | Customer_Type__c | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

And then we can assign the permission set to that user here it is sam Carl.

| Full Name | User License | Expires On | Time Zone | Status |
|-----------|--------------|------------|-----------|---------|
| Sam Carl | Salesforce | | | Success |


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

- If you look at the organization structure, he reports to Zeck (CEO) and has two sales reps (Jane and John) reporting to him. Show the same
- Provide Record-level security to Sam

Ans: So this can be done by using record-level access in this we have 4 types of access that is


- Organisation Wide Defaults
- Role Hierarchy
- Sharing Rule
- Manual Sharing

This is **OWD** which is a setting that determines the default level of access to records.


SETUP
Sharing Settings

Edit your organization-wide sharing defaults below. Changing these defaults will cause all sharing rules to be recalculated. This could require significant system resources and time organization. Setting an object to Private makes records visible to record owners and those above them in the role hierarchy, and access can be extended using sharing rules.

| Object | Default Internal Access | Default External Access | Grant Access Using Hierarchies |
|----------------------|-----------------------------|-----------------------------|-------------------------------------|
| Lead | Public Read/Write/Transfer | Private | <input checked="" type="checkbox"/> |
| Account and Contract | Public Read/Write | Private | <input checked="" type="checkbox"/> |
| Order | Controlled by Parent | Controlled by Parent | <input checked="" type="checkbox"/> |
| Contact | Controlled by Parent | Controlled by Parent | <input checked="" type="checkbox"/> |
| Asset | Controlled by Parent | Controlled by Parent | <input checked="" type="checkbox"/> |
| Opportunity | Public Read/Write | Private | <input checked="" type="checkbox"/> |
| Case | Public Read/Write/Transfer | Private | <input checked="" type="checkbox"/> |
| Campaign | Public Full Access | Private | <input checked="" type="checkbox"/> |
| Campaign Member | Controlled by Campaign | Controlled by Campaign | <input checked="" type="checkbox"/> |
| User | Public Read Only | Private | <input checked="" type="checkbox"/> |
| Individual | Public Read/Write | Private | <input checked="" type="checkbox"/> |
| Voice Call | Private | Private | <input checked="" type="checkbox"/> |
| Activity | Private | Private | <input checked="" type="checkbox"/> |
| Calendar | Hide Details and Add Events | Hide Details and Add Events | <input checked="" type="checkbox"/> |
| Price Book | Use | Use | <input checked="" type="checkbox"/> |
| Product | Public Read/Write | Public Read/Write | <input checked="" type="checkbox"/> |
| Account Brand | Private | Private | <input checked="" type="checkbox"/> |

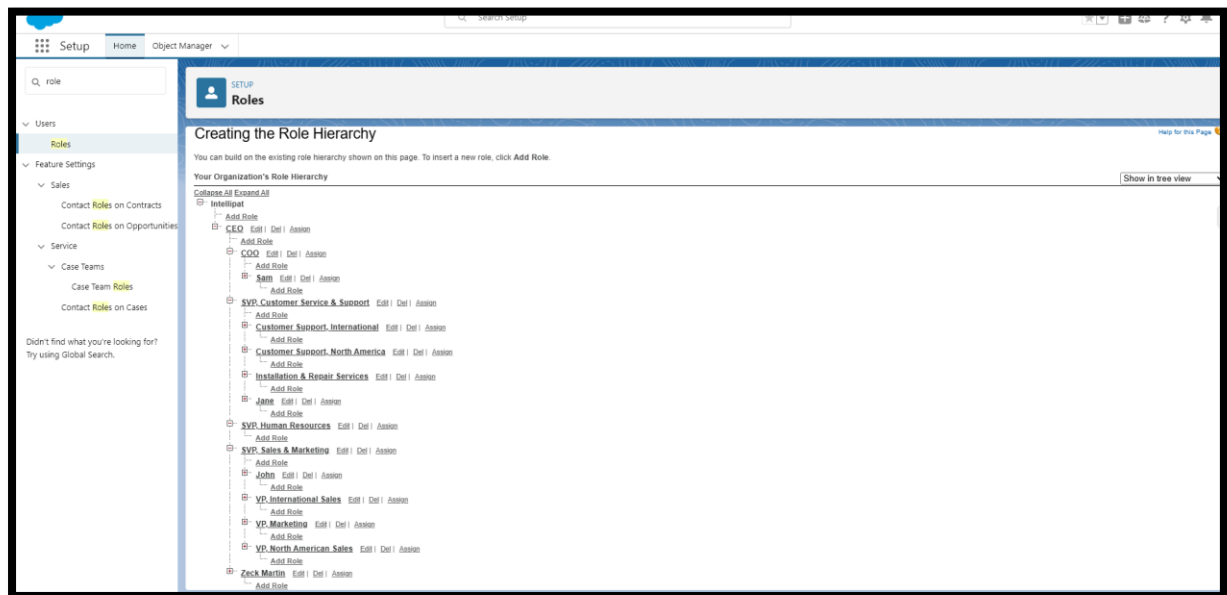

SETUP
Sharing Settings

Default Sharing Settings

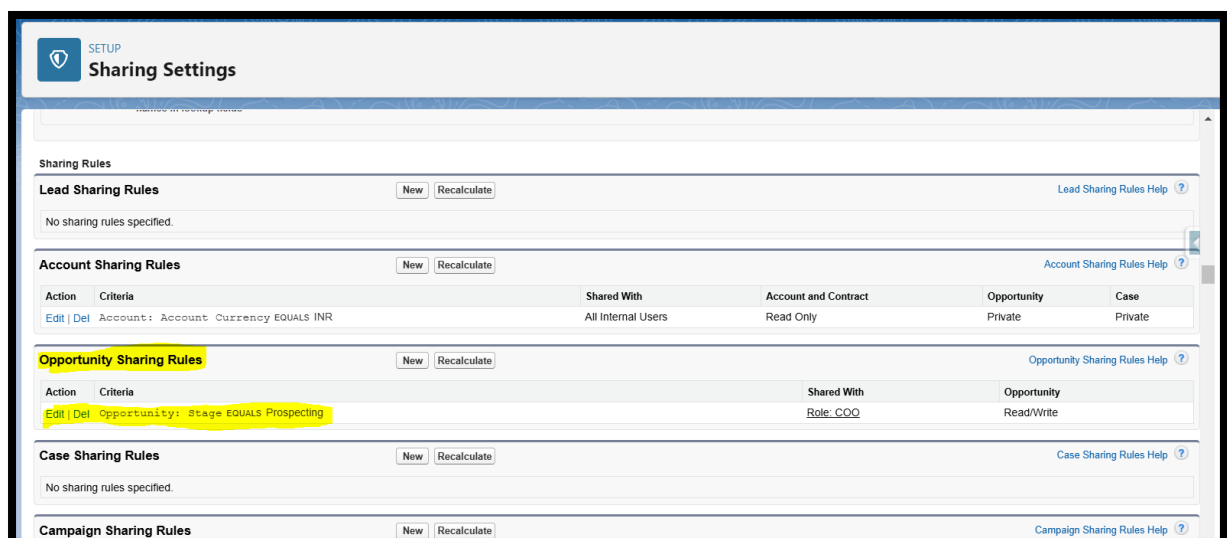
[Organization-Wide Defaults Help ?](#)

| Object | Default Internal Access | Default External Access | Grant Access Using Hierarchies |
|----------------------|-----------------------------|---|-------------------------------------|
| Lead | Public Read/Write/Transfer | Private | <input checked="" type="checkbox"/> |
| Account and Contract | Public Read/Write | Private | <input checked="" type="checkbox"/> |
| Contact | Controlled by Parent | Controlled by Parent | <input checked="" type="checkbox"/> |
| Order | Controlled by Parent | Controlled by Parent | <input checked="" type="checkbox"/> |
| Asset | Controlled by Parent | Controlled by Parent | <input checked="" type="checkbox"/> |
| Opportunity | Public Read/Write | Private | <input checked="" type="checkbox"/> |
| Case | Public Read/Write/Transfer | Private | <input checked="" type="checkbox"/> |
| Campaign | Public Full Access | Private | <input checked="" type="checkbox"/> |
| Campaign Member | Controlled by Campaign | Controlled by Campaign | <input checked="" type="checkbox"/> |
| User | Public Read Only | Private | <input checked="" type="checkbox"/> |
| Activity | Private | Private | <input checked="" type="checkbox"/> |
| Calendar | Hide Details and Add Events | Hide Details and Add Events | <input checked="" type="checkbox"/> |
| Price Book | Use | Use | <input checked="" type="checkbox"/> |
| Product | Public Read/Write | Public Read/Write | <input checked="" type="checkbox"/> |
| Individual | Public Read/Write | Private | <input checked="" type="checkbox"/> |
| Voice Call | Private | Private | <input checked="" type="checkbox"/> |
| Account Brand | Private | Private | <input checked="" type="checkbox"/> |
| Agent Work | Public Read Only | New Microsoft Word Macro-Enabled Document - Word (Product Activation Failed) | <input checked="" type="checkbox"/> |

Role Hierarchy here we can see the role assigned zeck is ceo and sam is under jack now what I did whatever share is with sam I given it to jane and john so they have also access on that particular records.



Sharing Rule: In this we can set up our own rule to give the access of the record on specific object by setting up the criteria. I am creating sharing rule on opportunity object. Here I given criteria if opportunity stage is equals to Prospecting it will assign to Sam Carl.



Manual Sharing:

Individual records can also be shared directly with Sam:

I Opened the Account record detail page in Salesforce.

Click **Sharing** and add Sam with the desired access level (Read/Write).

