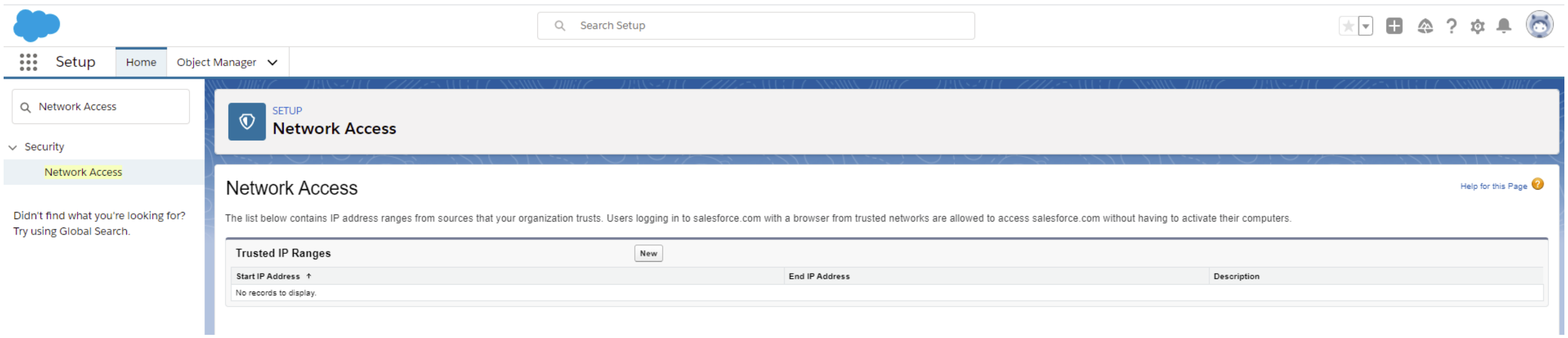
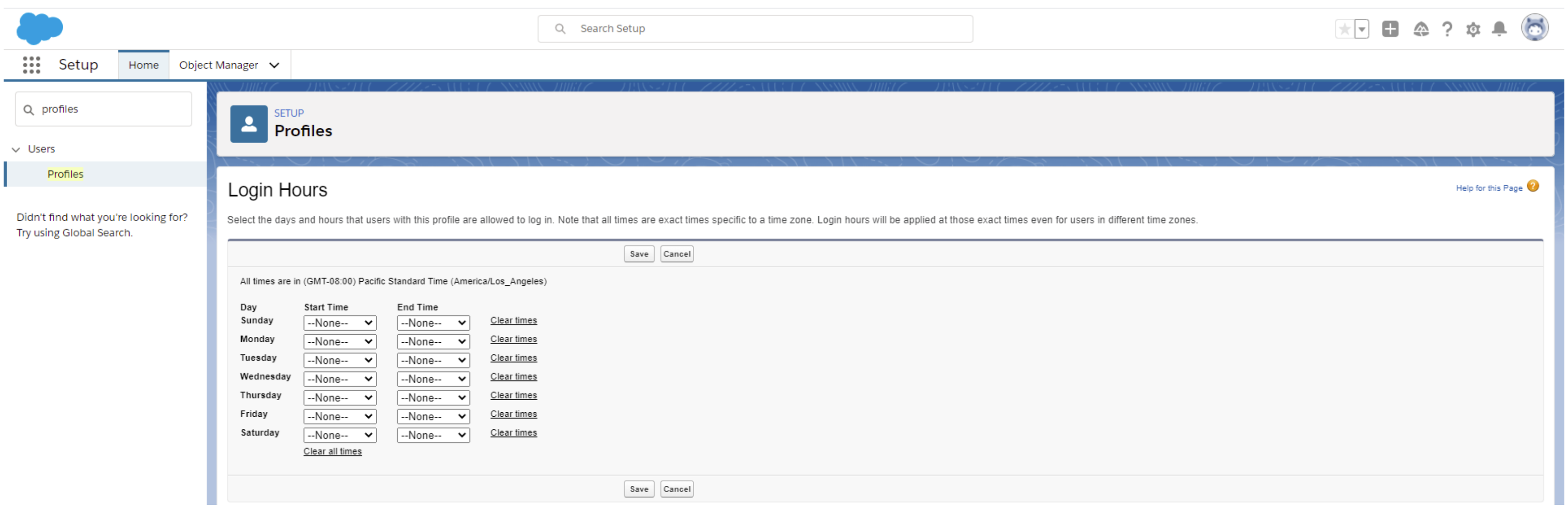

How-to Series: Data Visibility
WHO SEES WHAT
OVERVIEW
salesforce

Contents

01 Organization Access

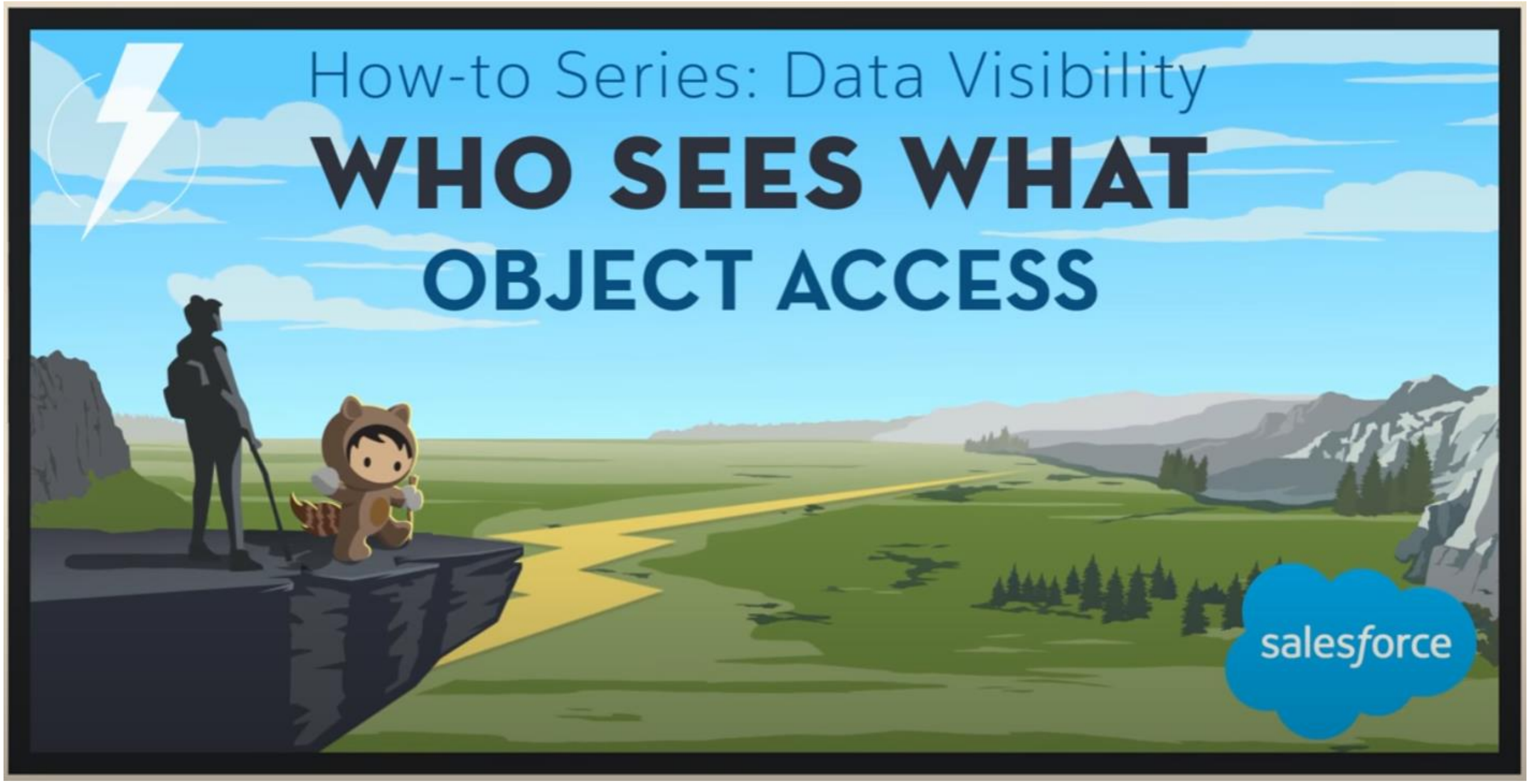

ORG
ACCESS
IP RANGES, LOGIN HOURS


Search Setup
Setup
Home
Object Manager
Network Access
Security
Network Access
Didn't find what you're looking for?
Try using Global Search.
SETUP
Network Access
Network Access
Help for this Page
The list below contains IP address ranges from sources that your organization trusts. Users logging in to salesforce.com with a browser from trusted networks are allowed to access salesforce.com without having to activate their computers.
Trusted IP Ranges
New
Start IP Address
End IP Address
Description
No records to display.

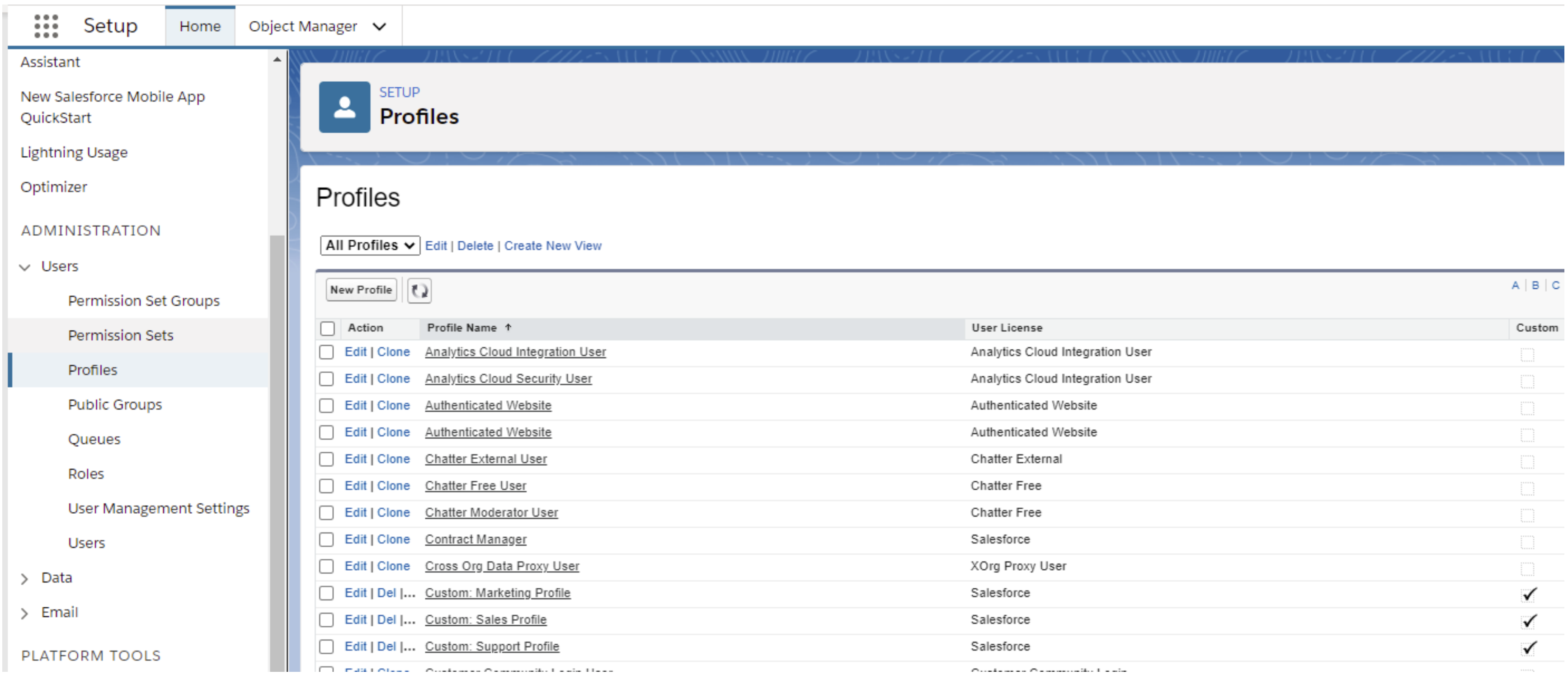

Search Setup
Setup
Home
Object Manager
profiles
Users
Profiles
Didn't find what you're looking for?
Try using Global Search.
SETUP
Profiles
Login Hours
Help for this Page
Select the days and hours that users with this profile are allowed to log in. Note that all times are exact times specific to a time zone. Login hours will be applied at those exact times even for users in different time zones.
Save
Cancel
All times are in (GMT-08:00) Pacific Standard Time (America/Los_Angeles)
Day
Start Time
End Time
Sunday
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
--None--
Clear times
Clear all times
Save
Cancel

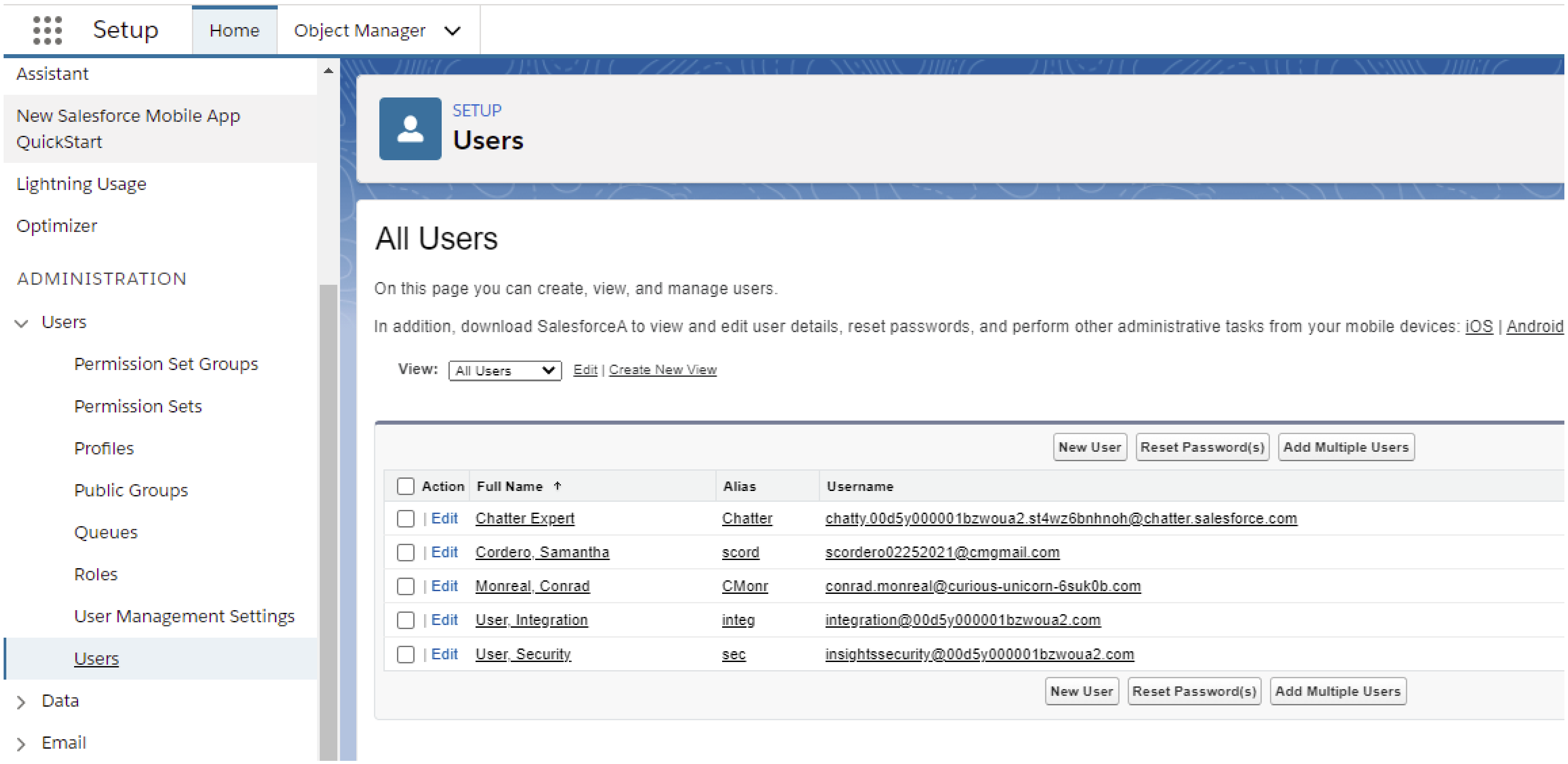
Login hours – set 12:00 AM to 12:00 AM – user of that profile will NOT be allowed to log in all day.

02 Object Access




OBJECT ACCESS
PROFILES

OBJECT ACCESS
PROFILES
ORG-WIDE DEFAULTS

Setup
Home
Object Manager
Assistant
New Salesforce Mobile App QuickStart
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Data
Email
PLATFORM TOOLS
SETUP
Profiles
Profiles
All Profiles
Edit | Delete | Create New View
New Profile
A | B | C
Action
Profile Name
User License
Custom
Edit | Clone Analytics Cloud Integration User Analytics Cloud Integration User
Edit | Clone Analytics Cloud Security User Analytics Cloud Integration User
Edit | Clone Authenticated Website Authenticated Website
Edit | Clone Authenticated Website Authenticated Website
Edit | Clone Chatter External User Chatter External
Edit | Clone Chatter Free User Chatter Free
Edit | Clone Chatter Moderator User Chatter Free
Edit | Clone Contract Manager Salesforce
Edit | Clone Cross Org Data Proxy User XOrg Proxy User
Edit | Del |... Custom: Marketing Profile Salesforce
Edit | Del |... Custom: Sales Profile Salesforce
Edit | Del |... Custom: Support Profile Salesforce


Setup
Home
Object Manager
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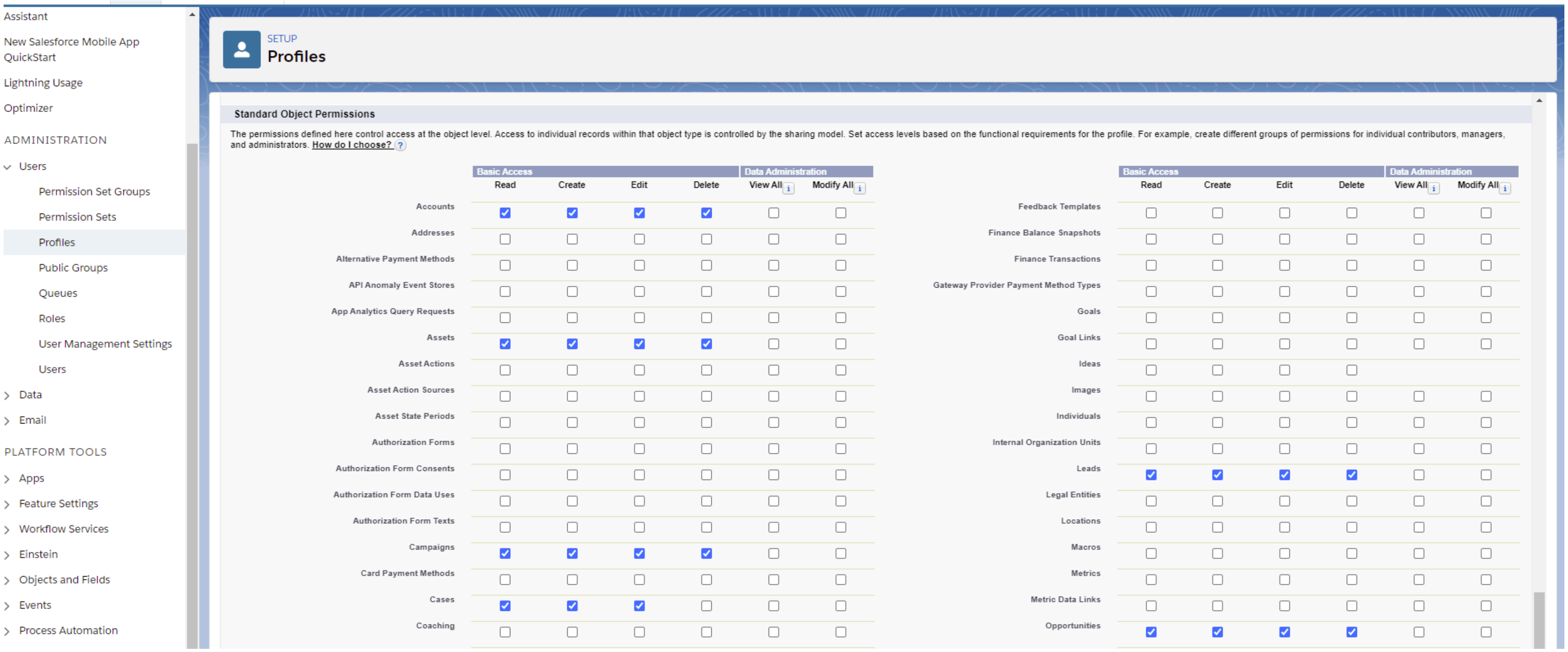
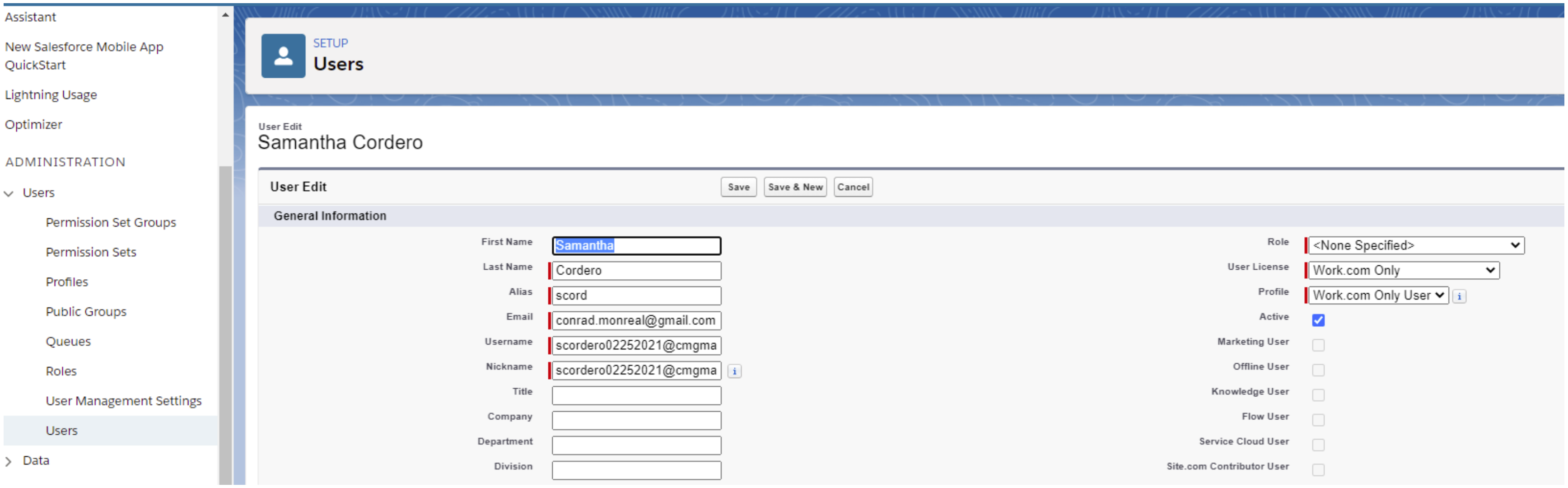
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Data
Email
SETUP
Users
All Users
On this page you can create, view, and manage users.
In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: iOS | Android
View: All Users Edit | Create New View
New User Reset Password(s) Add Multiple Users
Action Full Name Alias Username
Edit Chatter Expert Chatter chatty.00d5y000001bzwoua2.st4wz6bnhnoh@chatter.salesforce.com
Edit Cordero, Samantha scord scordero02252021@cmgmail.com
Edit Monreal, Conrad CMonr conrad.monreal@curious-unicorn-6suk0b.com
Edit User, Integration integ integration@00d5y000001bzwoua2.com
Edit User, Security sec insightssecurity@00d5y000001bzwoua2.com
New User Reset Password(s) Add Multiple Users

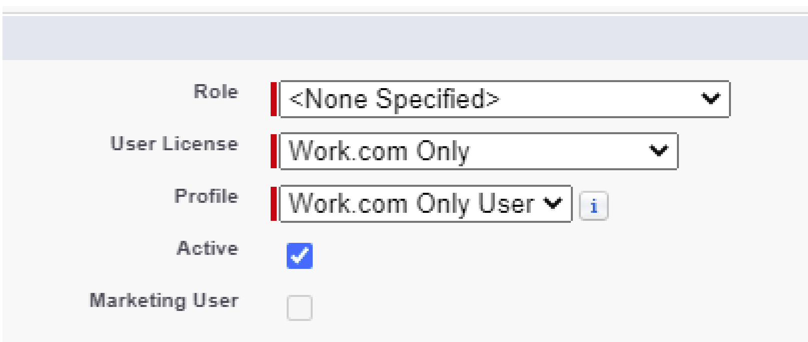


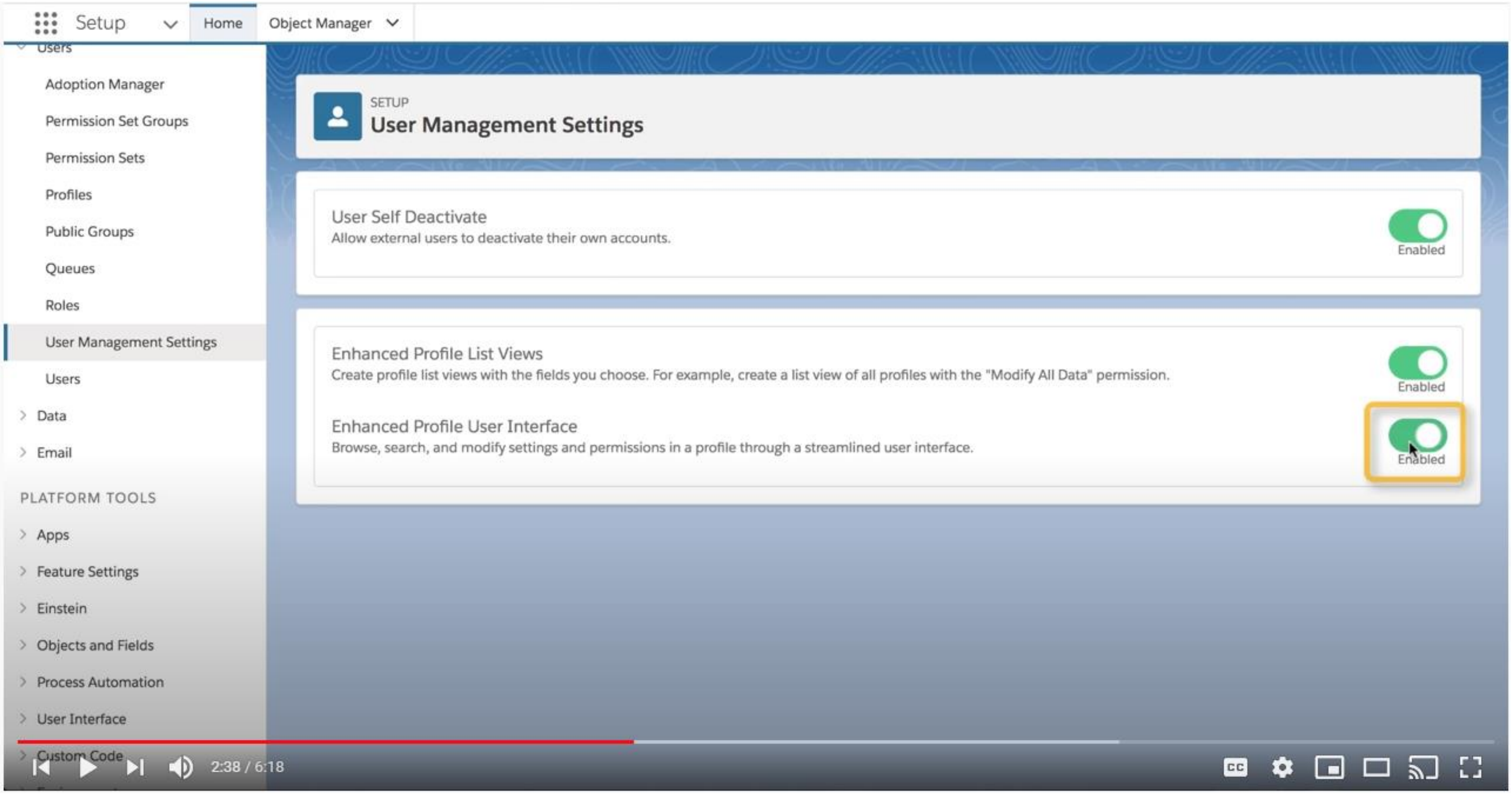
Parts of a Profile:

- Profile Edit
- Custom App Settings
- Connected App Access
- Service Provider Access
- Tab Settings
    - Standard Tab Settings
    - Custom Tab Settings
- Administrative Permissions
- General User Permissions
- Standard Object Permissions
- Desktop Integration Clients

- Session Settings
- Password Policies

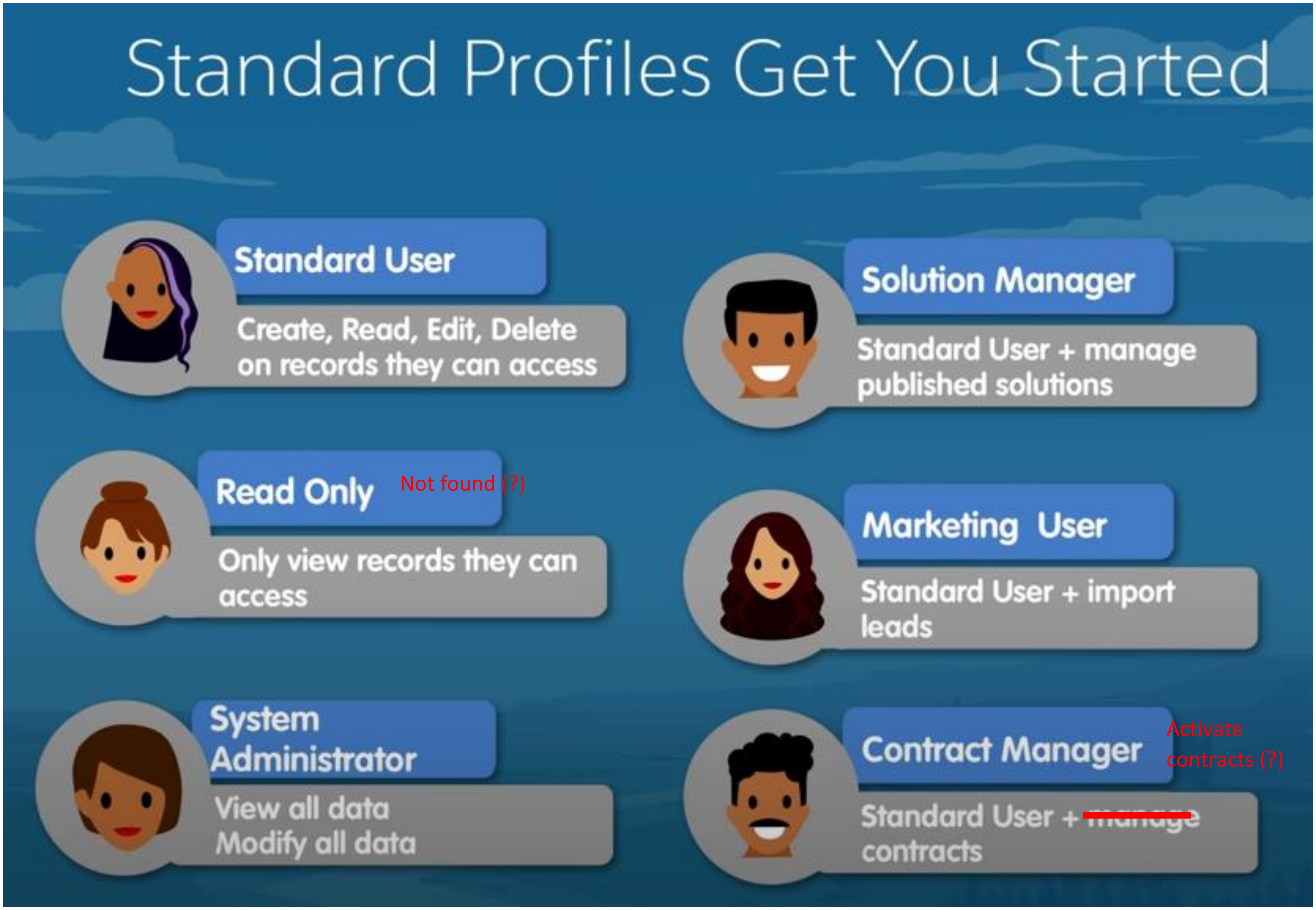




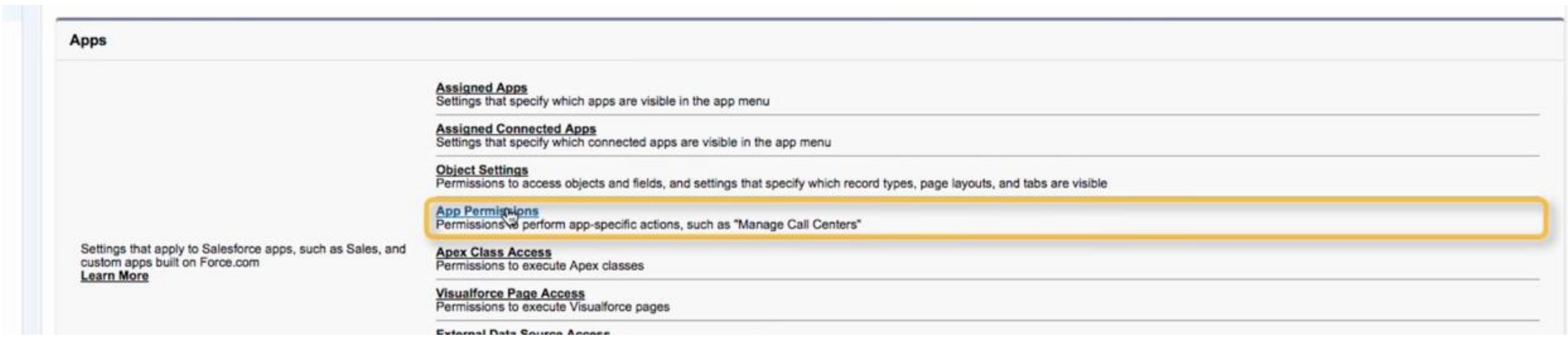


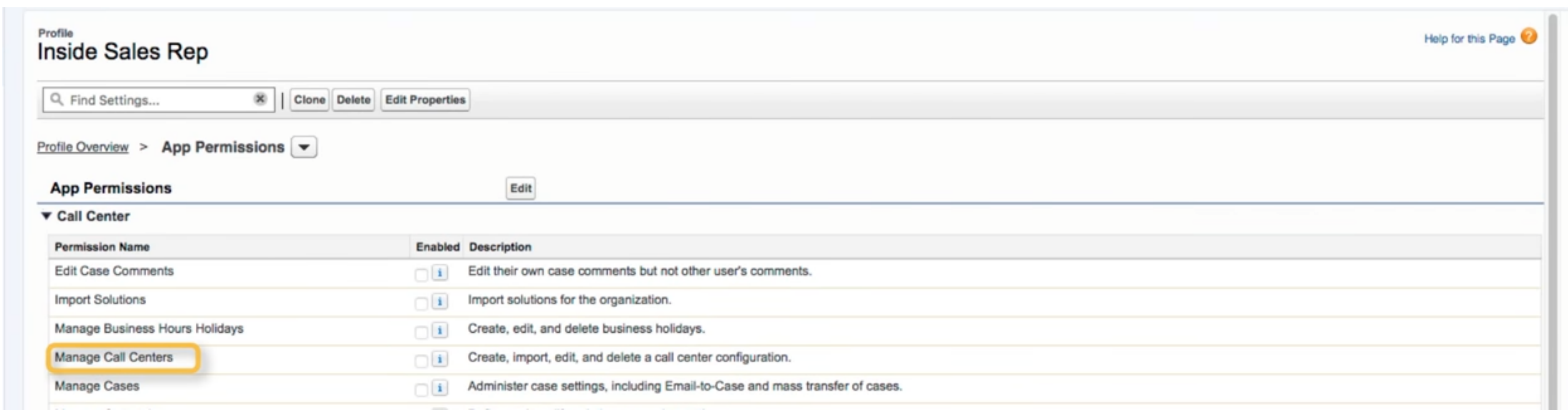
- Enable Enhanced Profile User Interface under User Management Settings
- Profiles
  - Determines what objects users can access
  - User permissions on Object Record
  - Controls which tabs are visible
  - Which tabs are available in App Launcher
  - Determines Object access
  - What permissions User has to each object

    - User access to each object
        - Create
        - Read
        - Edit
        - Delete
- Utilize Standard Profiles – clone and modify clone as needed; you can’t edit Standard Profiles.
- Profiles contain System Settings that control Log In hours and IP ranges


Standard Profiles Get You Started
Standard User
Create, Read, Edit, Delete on records they can access
Solution Manager
Standard User + manage published solutions
Read Only
Not found (?)
Only view records they can access
Marketing User
Standard User + import leads
System Administrator
View all data
Modify all data
Contract Manager
Activate contracts (?)
Standard User + ~~manage~~ contracts

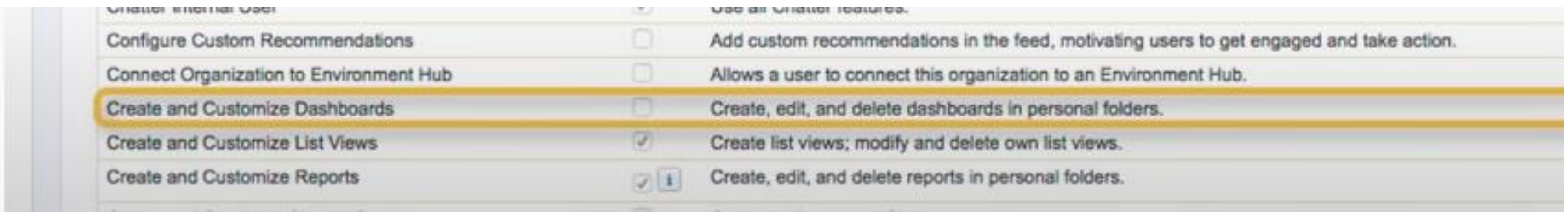
- Profile Interface is divided into two sections
    - Apps settings
        - What Apps are available to the user
        - Which Objects and Tabs a user as access
        - App specific permissions
            - Example – Manage Call Centers for the Call Center App

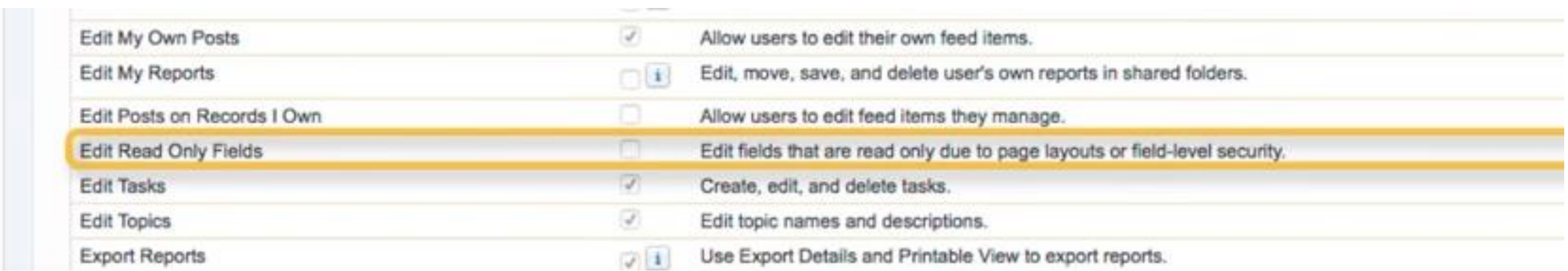




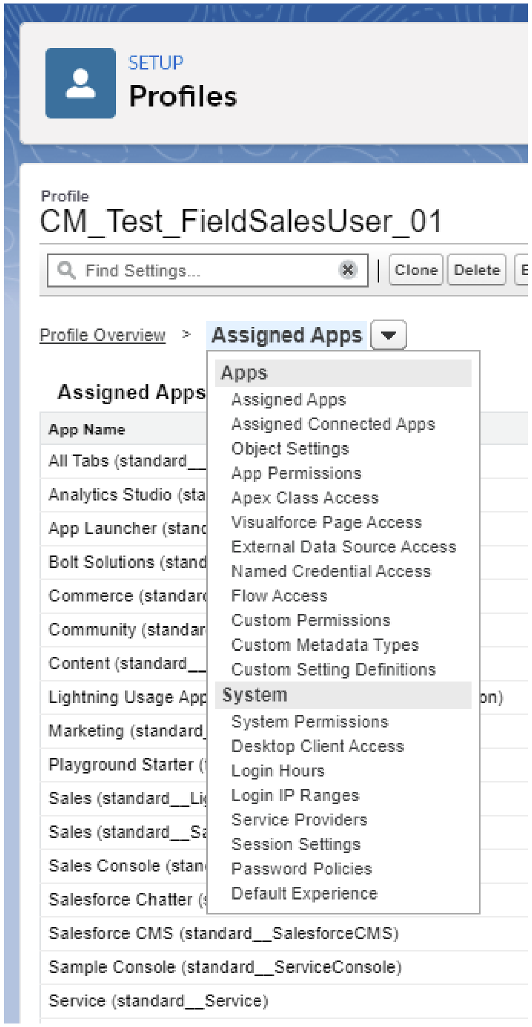
    - System settings (for a particular profile)
        - Login Hours
        - IP ranges

- System permissions – work across the entire app
- Examples

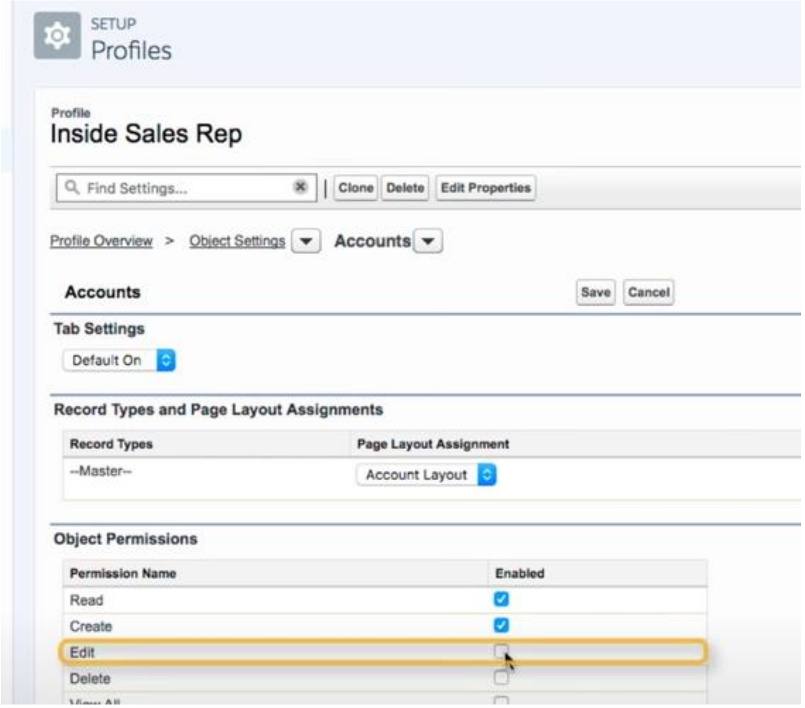


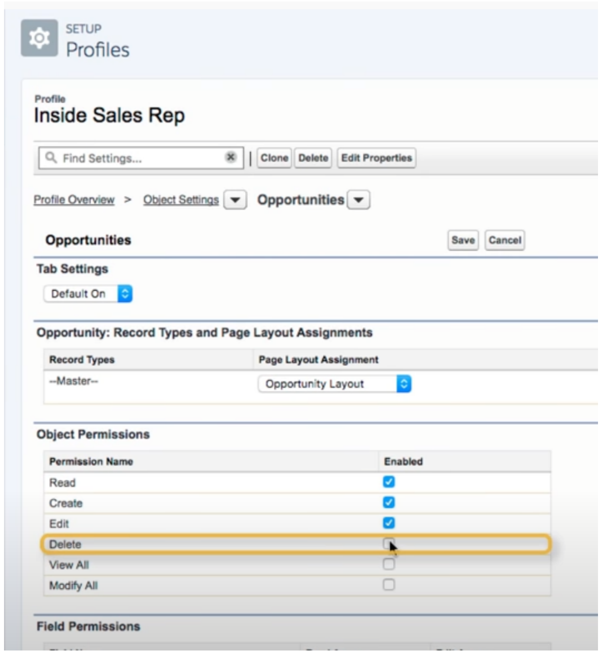


- Assigned Apps
  - Determine what Apps a user should be able to access
  - Choose default App access
- Next – Set Object permissions for this profile
  - Can utilize drop down list – access to both Apps and System settings

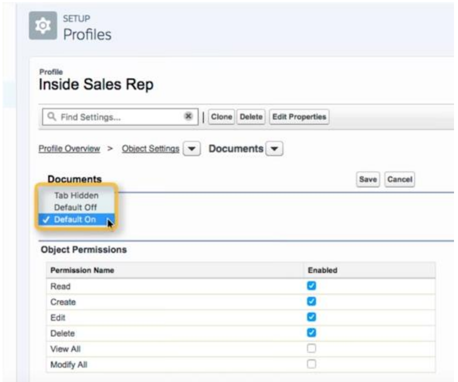


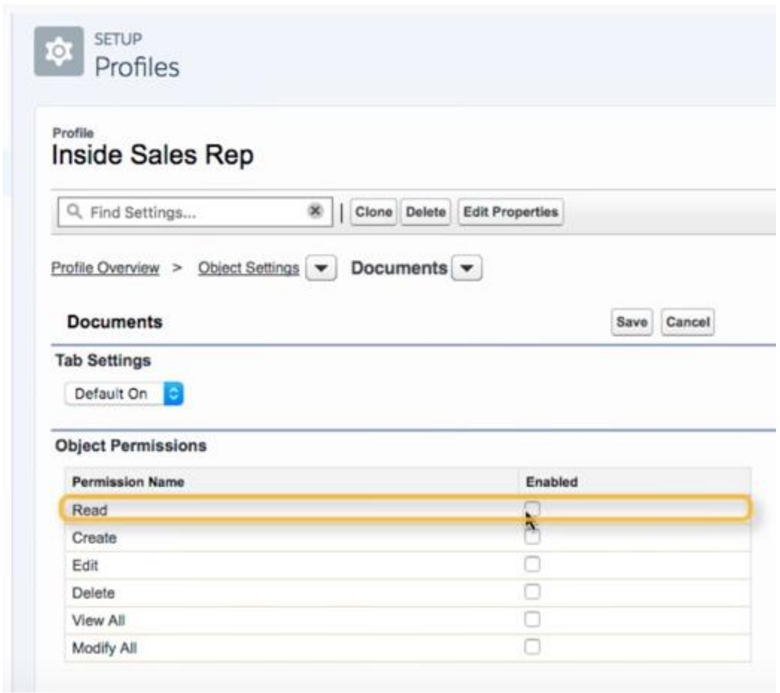
  -

- Click on Object Settings
    - Customize settings for each object as needed
    - Use Object Settings Picklist (drop down list)
- Example Configurations
    - Inside Sales Rep
        - Do NOT want them modifying Accounts
        - Only Marketing team
        - Account Object
            - Object Permissions
            - Clear check box for Edit and Delete
    - 

- Contacts Object
    - Leave as is, Inside Sales Rep should be in contact with Clients and updating their Contact records.
- Opportunities Object
    - Inside Sales Rep – Do NOT delete opportunity record.
    - If Opportunity is lost, keep record in system
    - Remove check mark in Delete
    - Part of evaluation of wins and losses
    - 

- Documents Object – Users Chatter files and content for all document storage
    - Do NOT want sales people to mistakenly use the Document object
    - N/A – one option is to just mark this option as hidden

- 

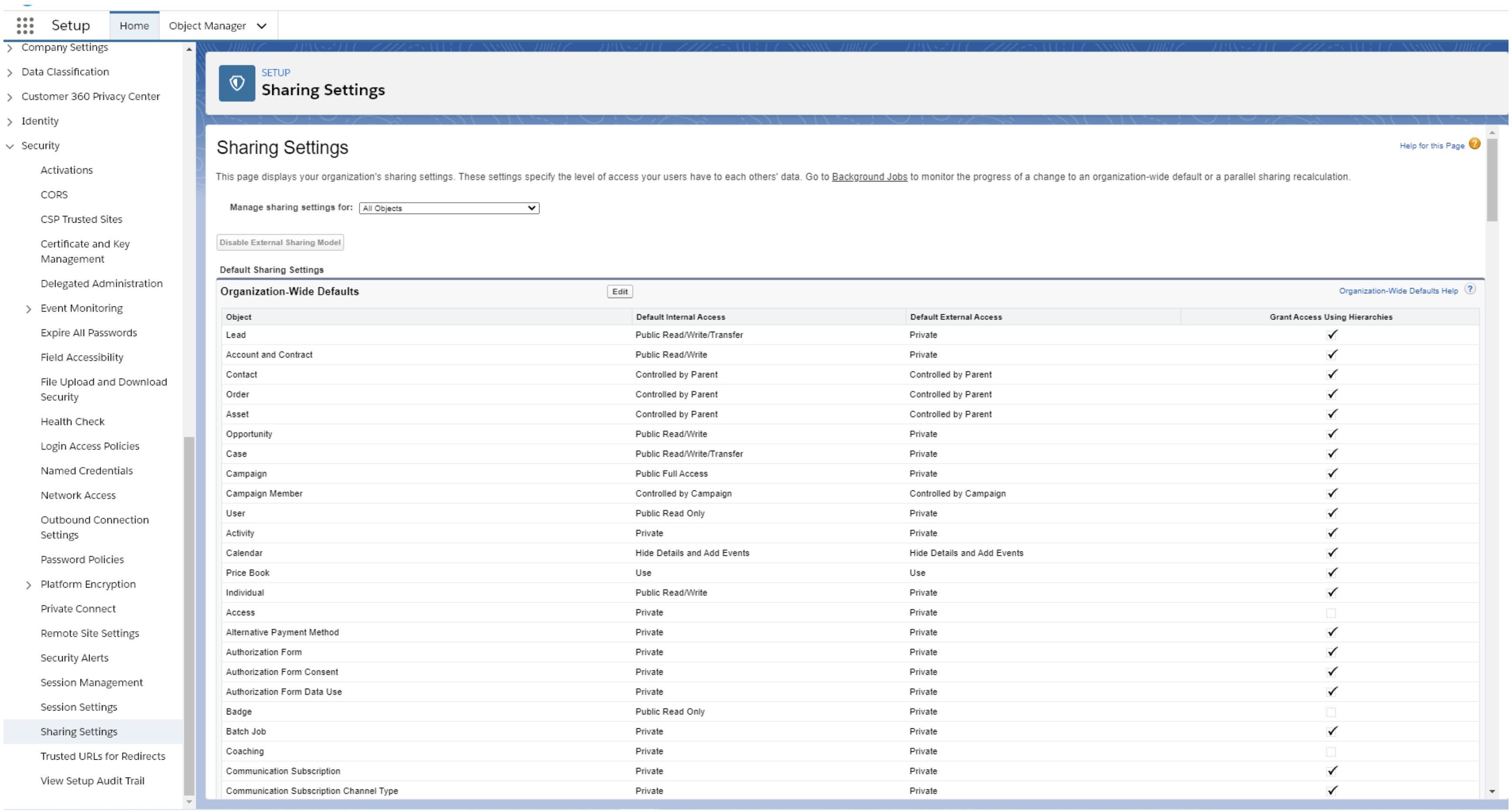
- May still see records in Reports, Dashboards or in related Lists
- Goal is to prevent access to this object in its entirety
- Clear Read check box and eliminate access
- 

- When complete you assign profile to a user

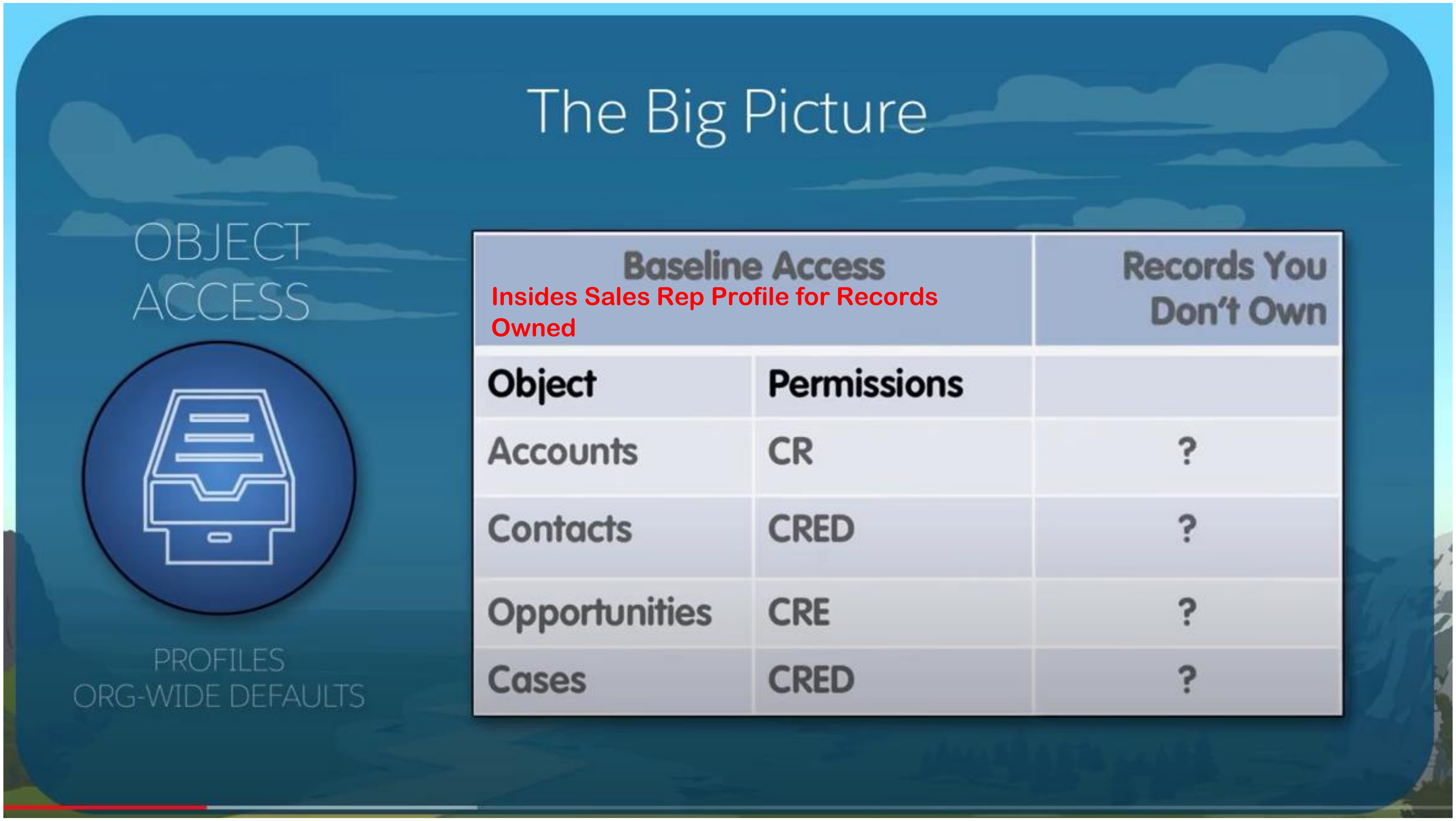
- In this case the Inside Sales team users

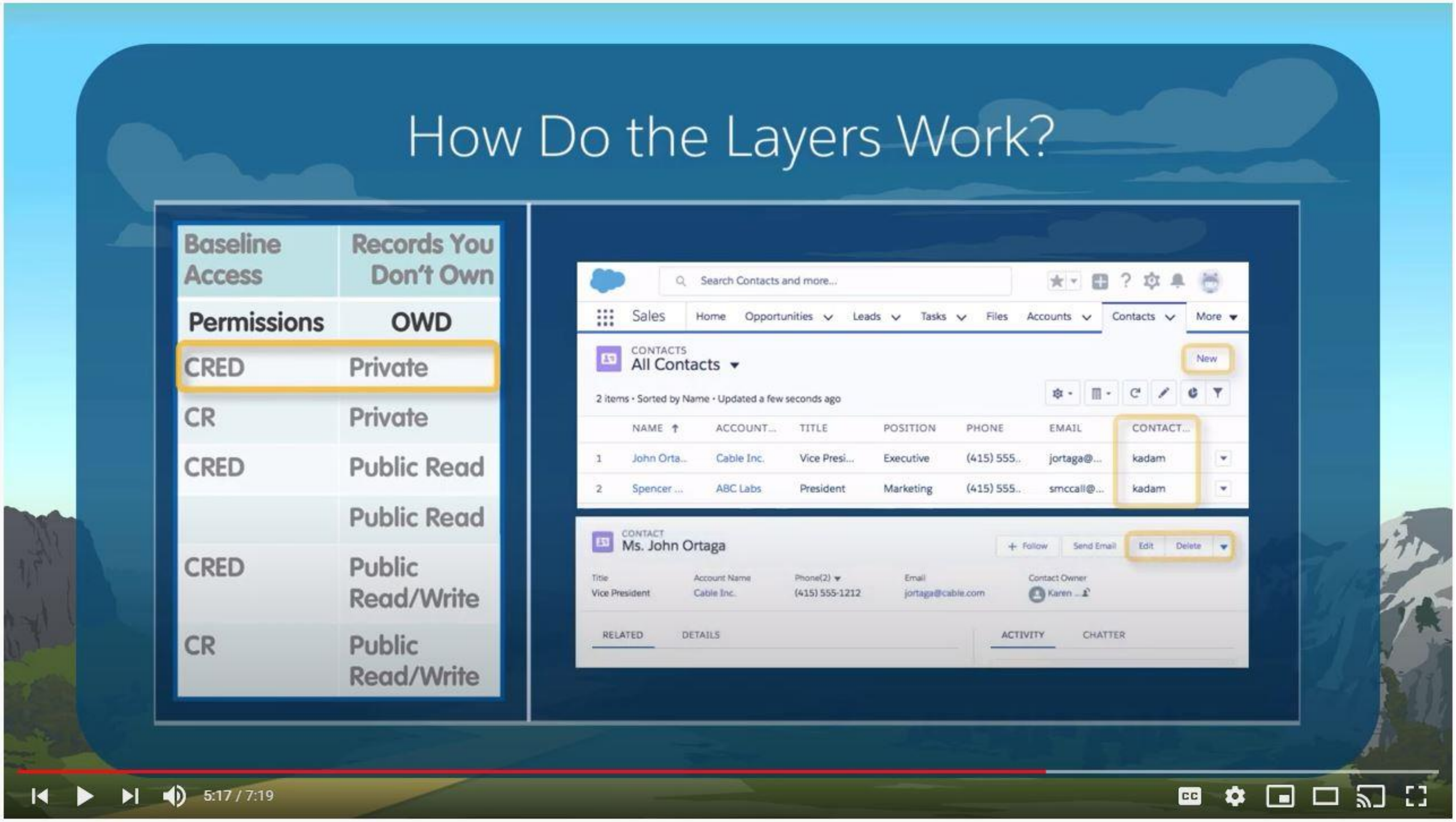
03 Org-Wide Defaults

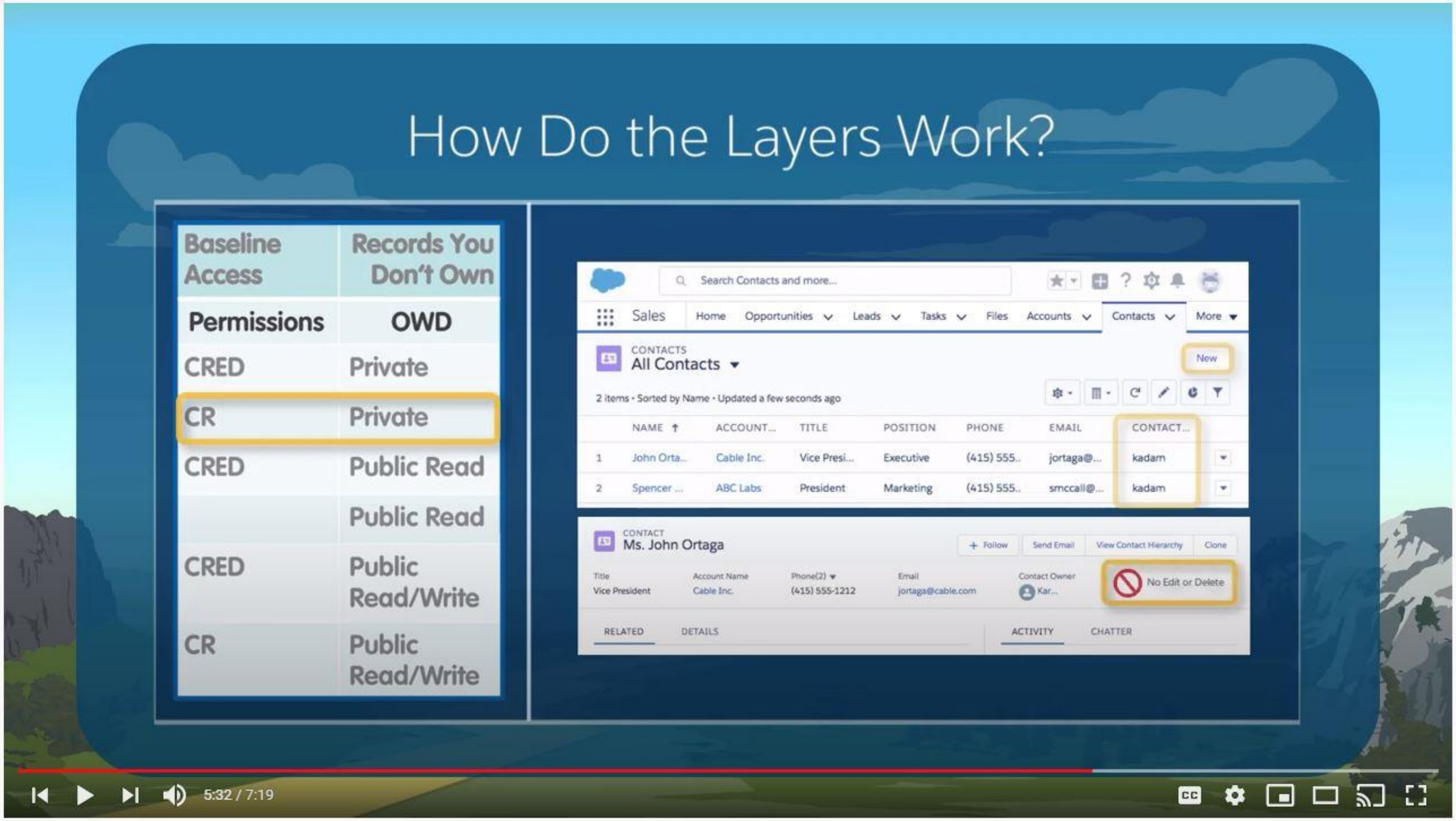
Go To: Setup/Security/Sharing Settings



Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓
Price Book	Use	Use	✓
Individual	Public Read/Write	Private	✓
Access	Private	Private	
Alternative Payment Method	Private	Private	✓
Authorization Form	Private	Private	✓
Authorization Form Consent	Private	Private	✓
Authorization Form Data Use	Private	Private	✓
Badge	Public Read Only	Private	
Batch Job	Private	Private	✓
Coaching	Private	Private	
Communication Subscription	Private	Private	✓
Communication Subscription Channel Type	Private	Private	✓


The Big Picture
OBJECT ACCESS
PROFILES
ORG-WIDE DEFAULTS
Baseline Access
Insides Sales Rep Profile for Records Owned
Records You Don't Own
Object
Permissions
Accounts
CR
?
Contacts
CRED
?
Opportunities
CRE
?
Cases
CRED
?


How Do the Layers Work?
Baseline Access
Records You Don't Own
Permissions
OWD
CRED
Private
CR
Private
CRED
Public Read
Public Read
CRED
Public Read/Write
CR
Public Read/Write
Search Contacts and more...
Sales
Home
Opportunities
Leads
Tasks
Files
Accounts
Contacts
More
CONTACTS
All Contacts
New
2 items • Sorted by Name • Updated a few seconds ago
NAME
ACCOUNT...
TITLE
POSITION
PHONE
EMAIL
CONTACT...
1
John Orta...
Cable Inc.
Vice Presi...
Executive
(415) 555...
jortaga@...
kadam
2
Spencer ...
ABC Labs
President
Marketing
(415) 555...
smccall@...
kadam
CONTACT
Ms. John Ortaga
+ Follow
Send Email
Edit
Delete
Title
Vice President
Account Name
Cable Inc.
Phone(2)
(415) 555-1212
Email
jortaga@cable.com
Contact Owner
Karen ...
RELATED
DETAILS
ACTIVITY
CHATTER
5:17 / 7:19


How Do the Layers Work?
Baseline Access
Records You Don't Own
Permissions
OWD
CRED
Private
CR
Private
CRED
Public Read
Public Read
CRED
Public Read/Write
CR
Public Read/Write
Search Contacts and more...
Sales
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CONTACTS
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ACCOUNT...
TITLE
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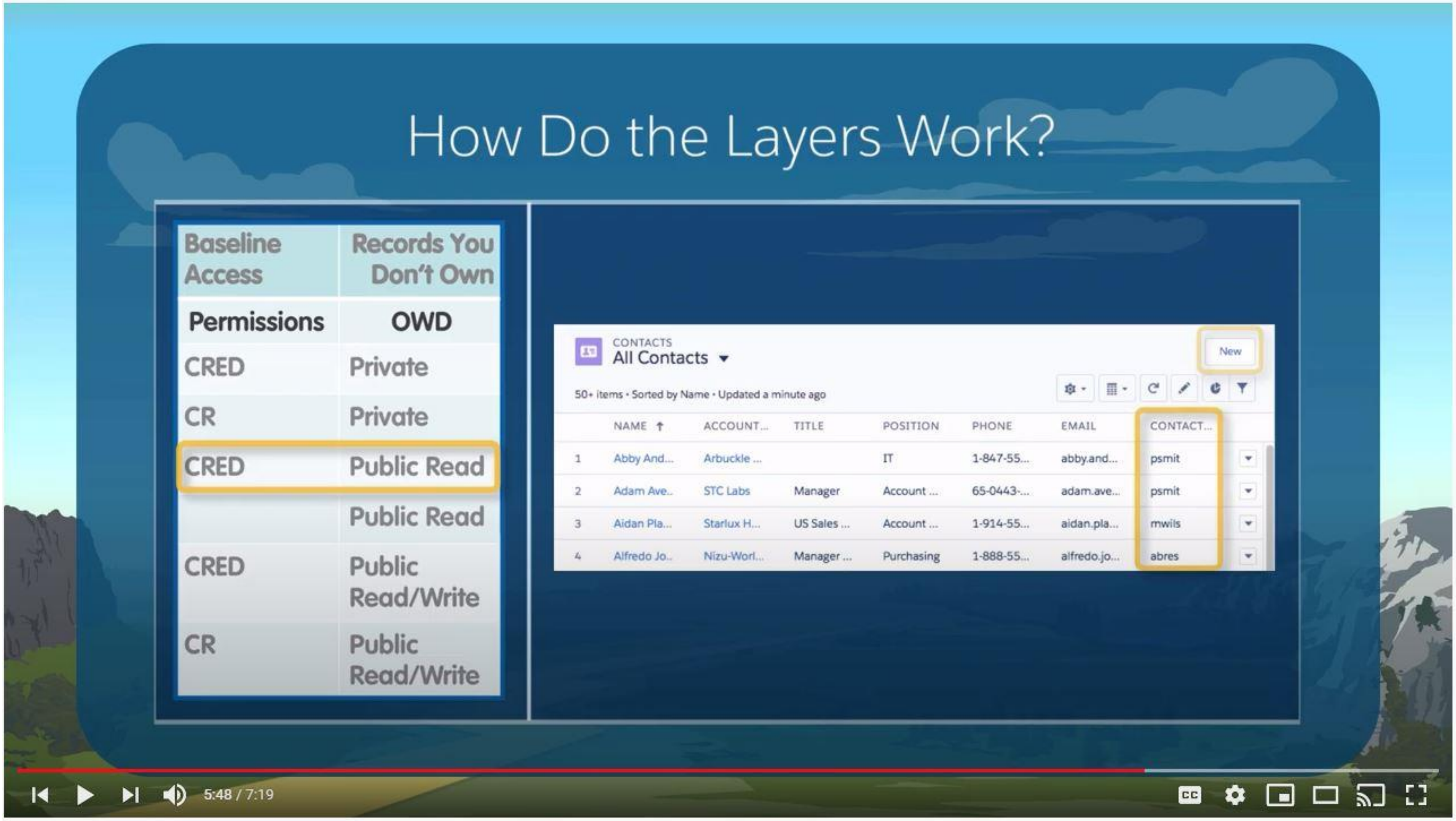
PHONE
EMAIL
CONTACT...
1
John Orta...
Cable Inc.
Vice Presi...
Executive
(415) 555...
jortaga@...
kadam
2
Spencer ...
ABC Labs
President
Marketing
(415) 555...
smccall@...
kadam
CONTACT
Ms. John Ortaga
+ Follow
Send Email
View Contact Hierarchy
Clone
Title
Vice President
Account Name
Cable Inc.
Phone(2)
(415) 555-1212
Email
jortaga@cable.com
Contact Owner
Kar...
No Edit or Delete
RELATED
DETAILS
ACTIVITY
CHATTER
5:32 / 7:19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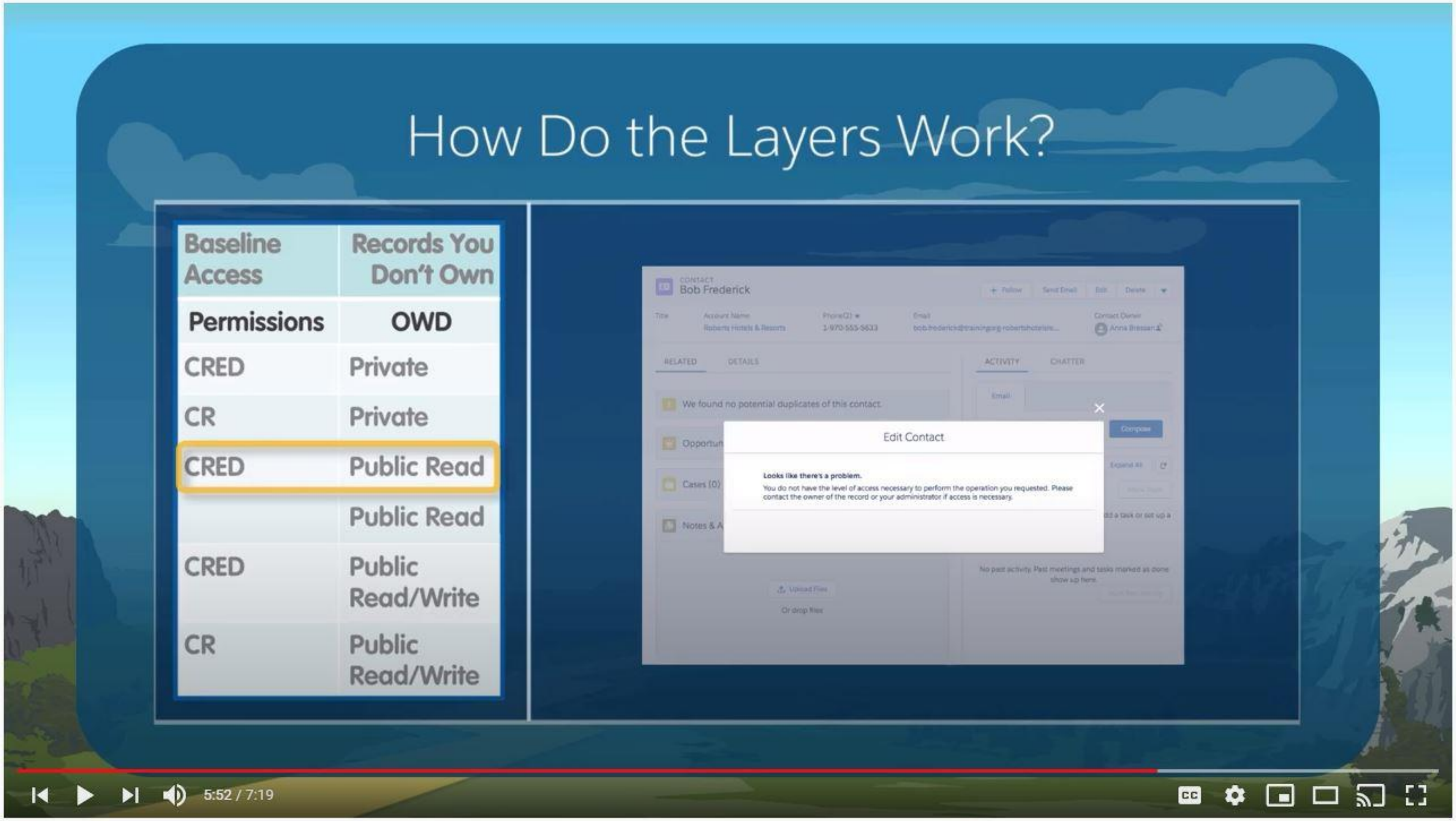
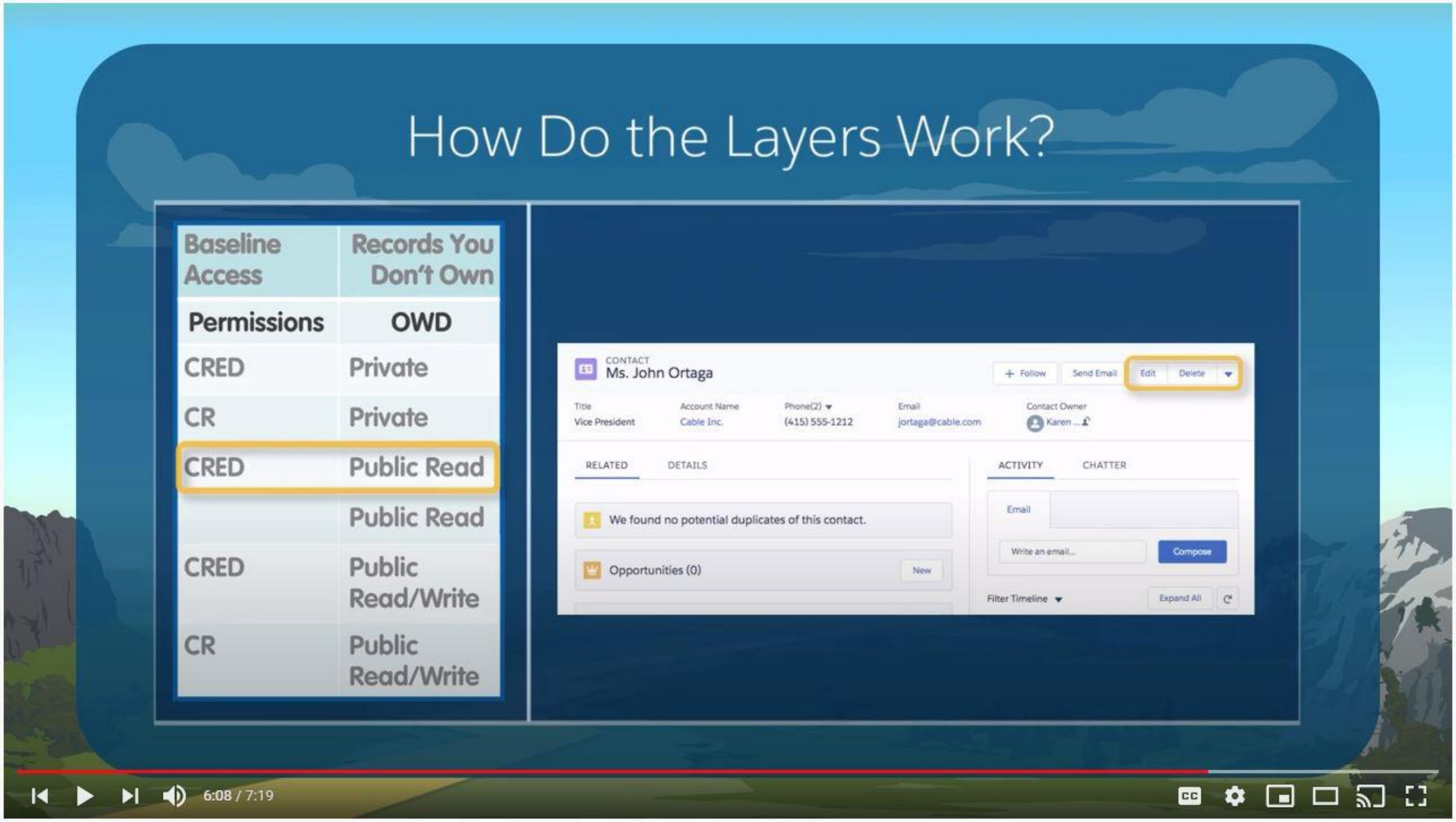
Permissions
OWD
CRED
Private
CR
Private
CRED
Public Read
Public Read
CRED
Public Read/Write
CR
Public Read/Write
CONTACTS
All Contacts
New
50+ items • Sorted by Name • Updated a minute ago
NAME
ACCOUNT...
TITLE
POSITION
PHONE
EMAIL
CONTACT...
1 Abby And... Arbuckle ... IT 1-847-55... abby.and... psmit
2 Adam Ave... STC Labs Manager Account ... 65-0443-... adam.ave... psmit
3 Aidan Pla... Starlux H... US Sales ... Account ... 1-914-55... aidan.pla... mwils
4 Alfredo Jo... Nizu-Worl... Manager ... Purchasing 1-888-55... alfredo.jo... abres
5:48 / 7:19


How Do the Layers Work?
Baseline Access
Records You Don't Own
Permissions
OWD
CRED
Private
CR
Private
CRED
Public Read
Public Read
CRED
Public Read/Write
CR
Public Read/Write
Bob Frederick
We found no potential duplicates of this contact.
Edit Contact
Looks like there's a problem.
You do not have the level of access necessary to perform the operation you requested. Please contact the owner of the record or your administrator if access is necessary.
5:52 / 7:19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Records You Don't Own
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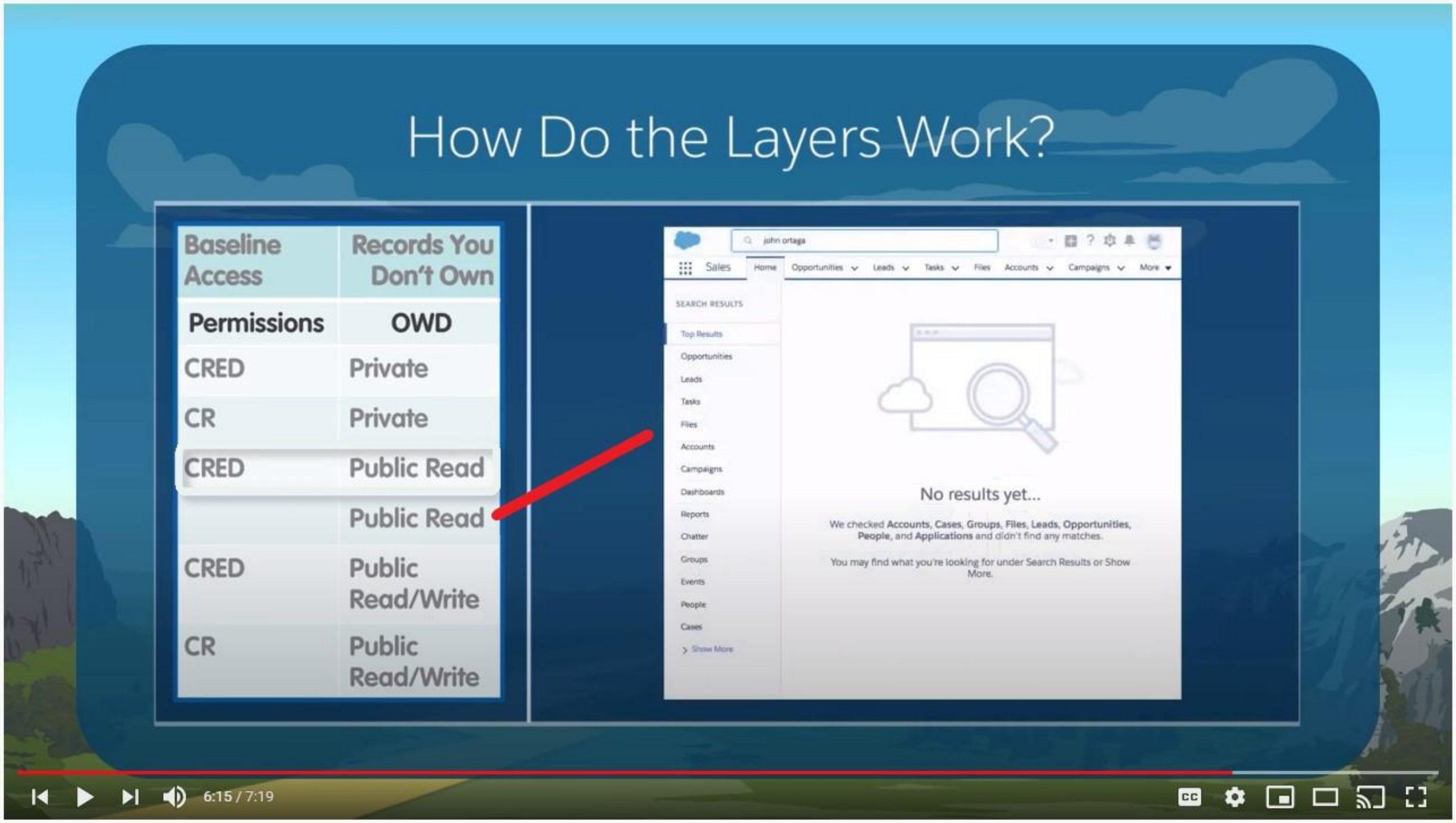
Private
CRED
Public Read
Public Read
CRED
Public Read/Write
CR
Public Read/Write
CONTACT
Ms. John Ortaga
+ Follow
Send Email
Edit
Delete
Title
Vice President
Account Name
Cable Inc.
Phone(2)
(415) 555-1212
Email
jortaga@cable.com
Contact Owner
Karen ...
RELATED
DETAILS
ACTIVITY
CHATTER
We found no potential duplicates of this contact.
Opportunities (0)
New
Email
Write an email...
Compose
Filter Timeline
Expand All
6:08 / 7:19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CR
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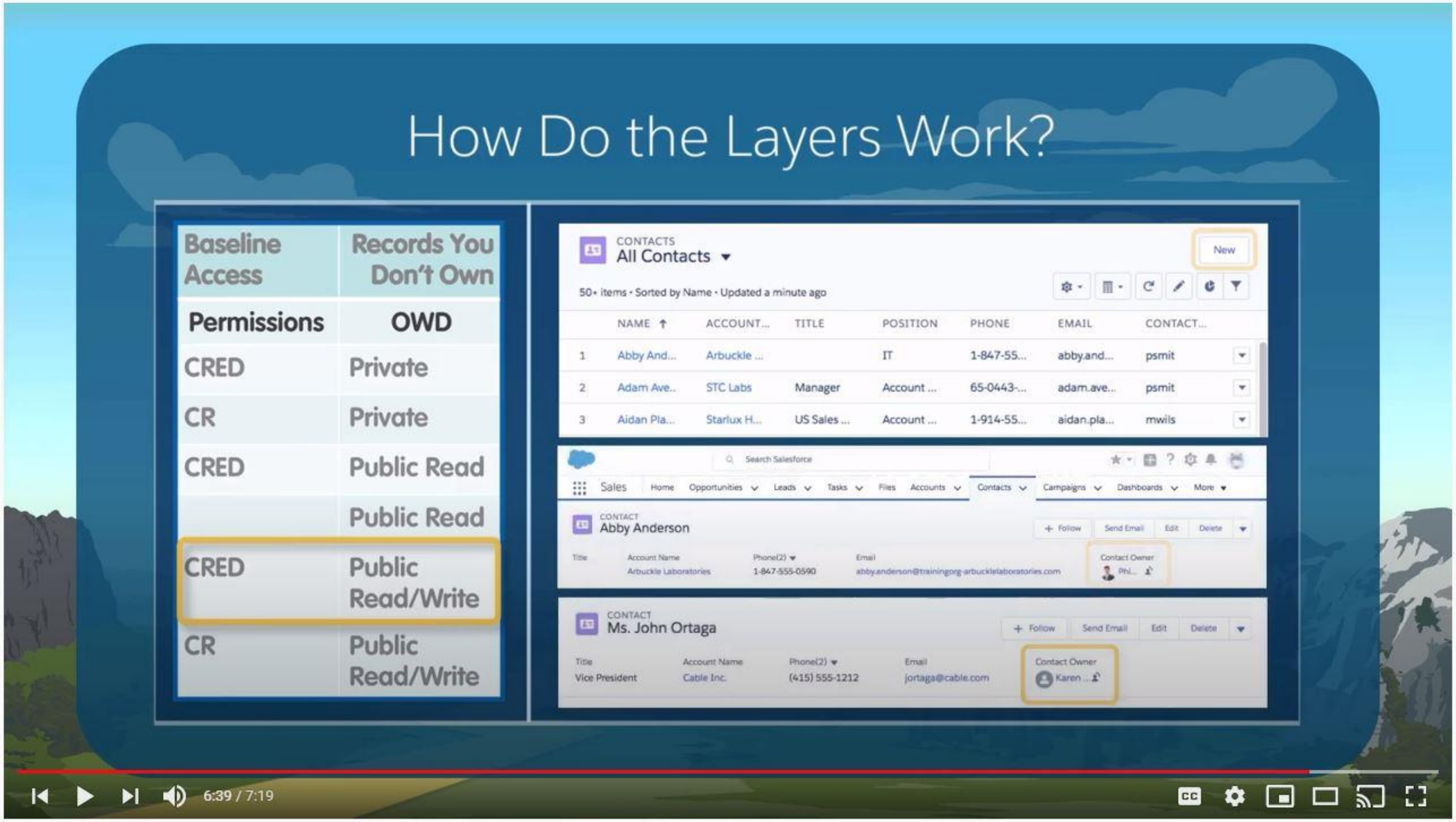
CRED
Public Read
Public Read
CRED
Public Read/Write
CR
Public Read/Write
john ortaga
Sales
Home
Opportunities
Leads
Tasks
Files
Accounts
Campaigns
More
SEARCH RESULTS
Top Results
Opportunities
Leads
Tasks
Files
Accounts
Campaigns
Dashboards
Reports
Chatter
Groups
Events
People
Cases
Show More
No results yet...
We checked Accounts, Cases, Groups, Files, Leads, Opportunities, People, and Applications and didn't find any matches.
You may find what you're looking for under Search Results or Show More.
6:15 / 7:19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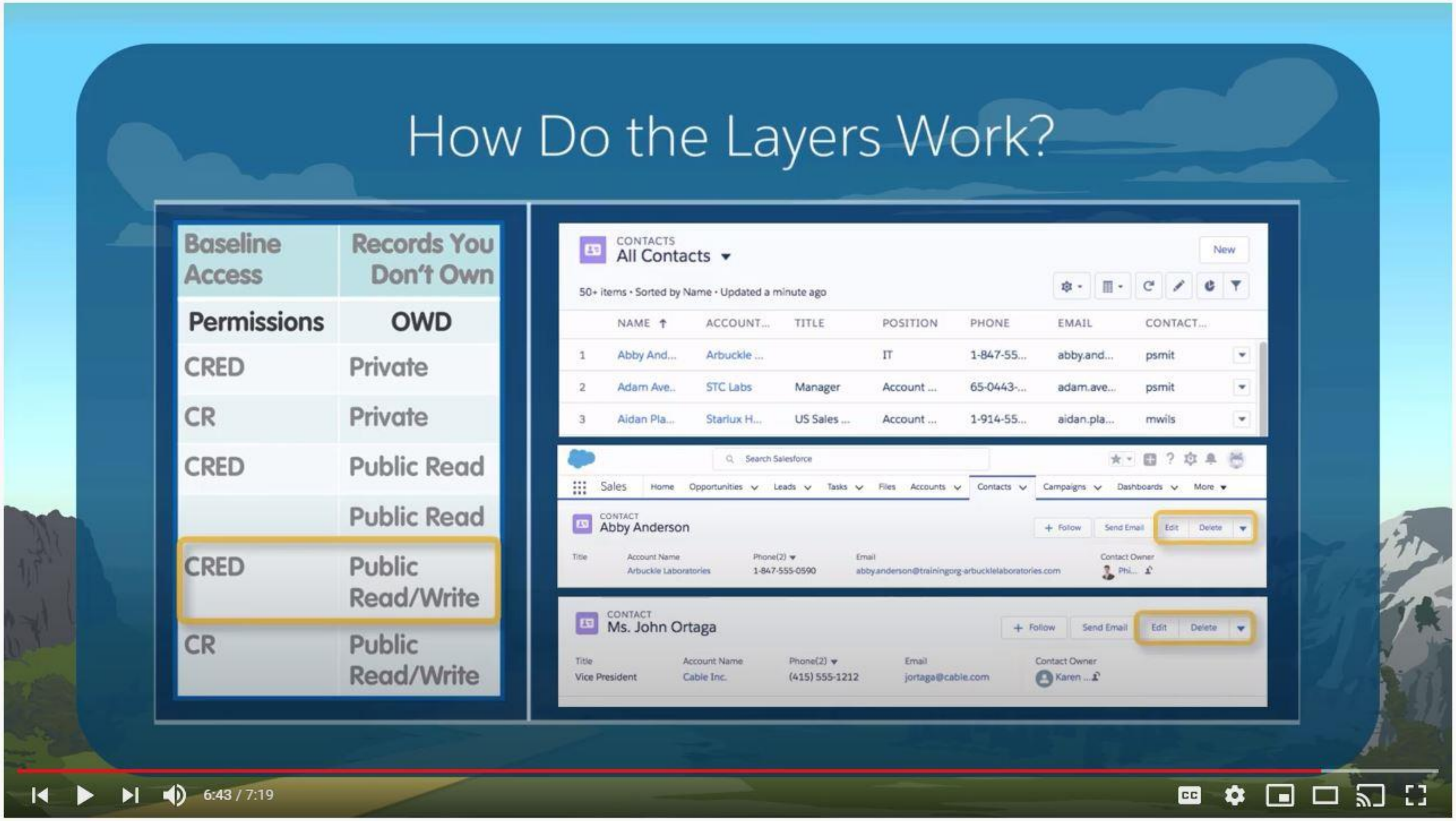
Baseline Access
Records You Don't Own
Permissions
OWD
CRED
Private
CR
Private
CRED
Public Read
Public Read
CRED
Public Read/Write
CR
Public Read/Write
CONTACTS
All Contacts
New
50+ items • Sorted by Name • Updated a minute ago
Abby Anderson
Ms. John Ortaga
6:39 / 7:19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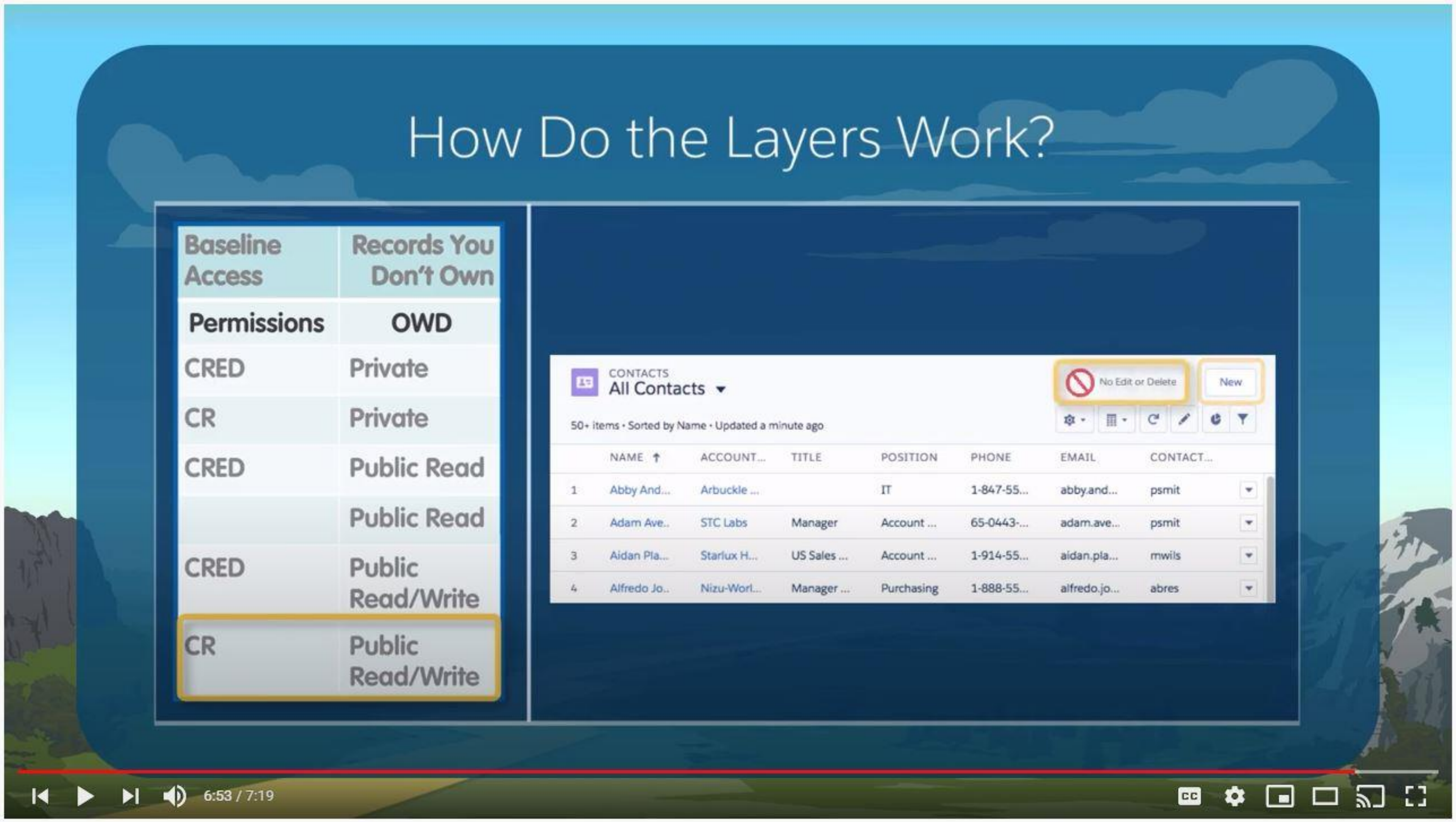
3 Aidan Pla... Starlux H... US Sales ... Account ... 1-914-55... aidan.pla... mwils
Search Salesforce
Sales
Home
Opportunities
Leads
Tasks
Files
Accounts
Contacts
Campaigns
Dashboards
More
CONTACT
Abby Anderson
Follow
Send Email
Edit
Delete
Title
Account Name
Arbuckle Laboratories
Phone(2)
1-847-555-0590
Email
abby.anderson@trainingorg-arbucklelaboratories.com
Contact Owner
CONTACT
Ms. John Ortaga
Follow
Send Email
Edit
Delete
Title
Vice President
Account Name
Cable Inc.
Phone(2)
(415) 555-1212
Email
jortaga@cable.com
Contact Owner
Karen ...
6:43 / 7:19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Public Read
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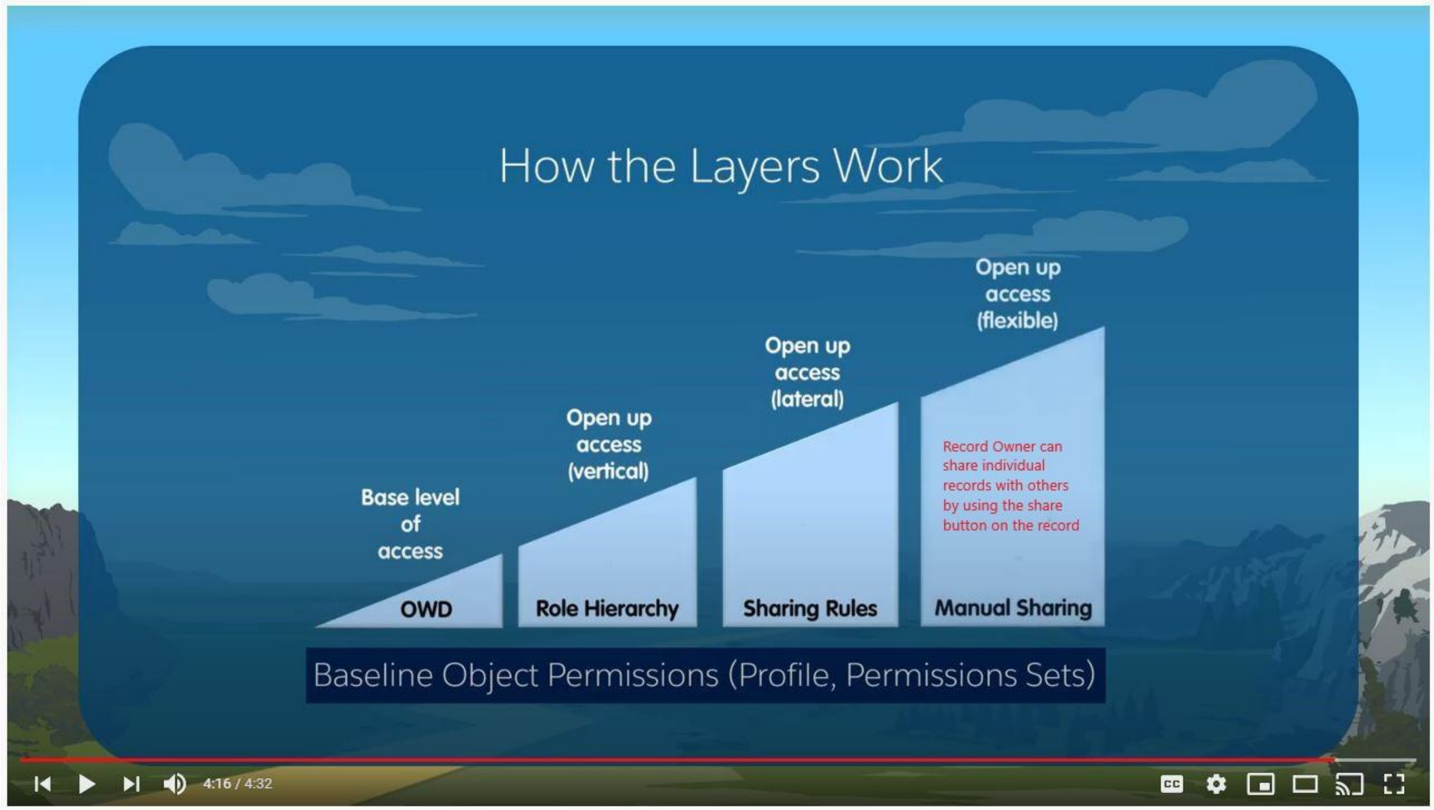
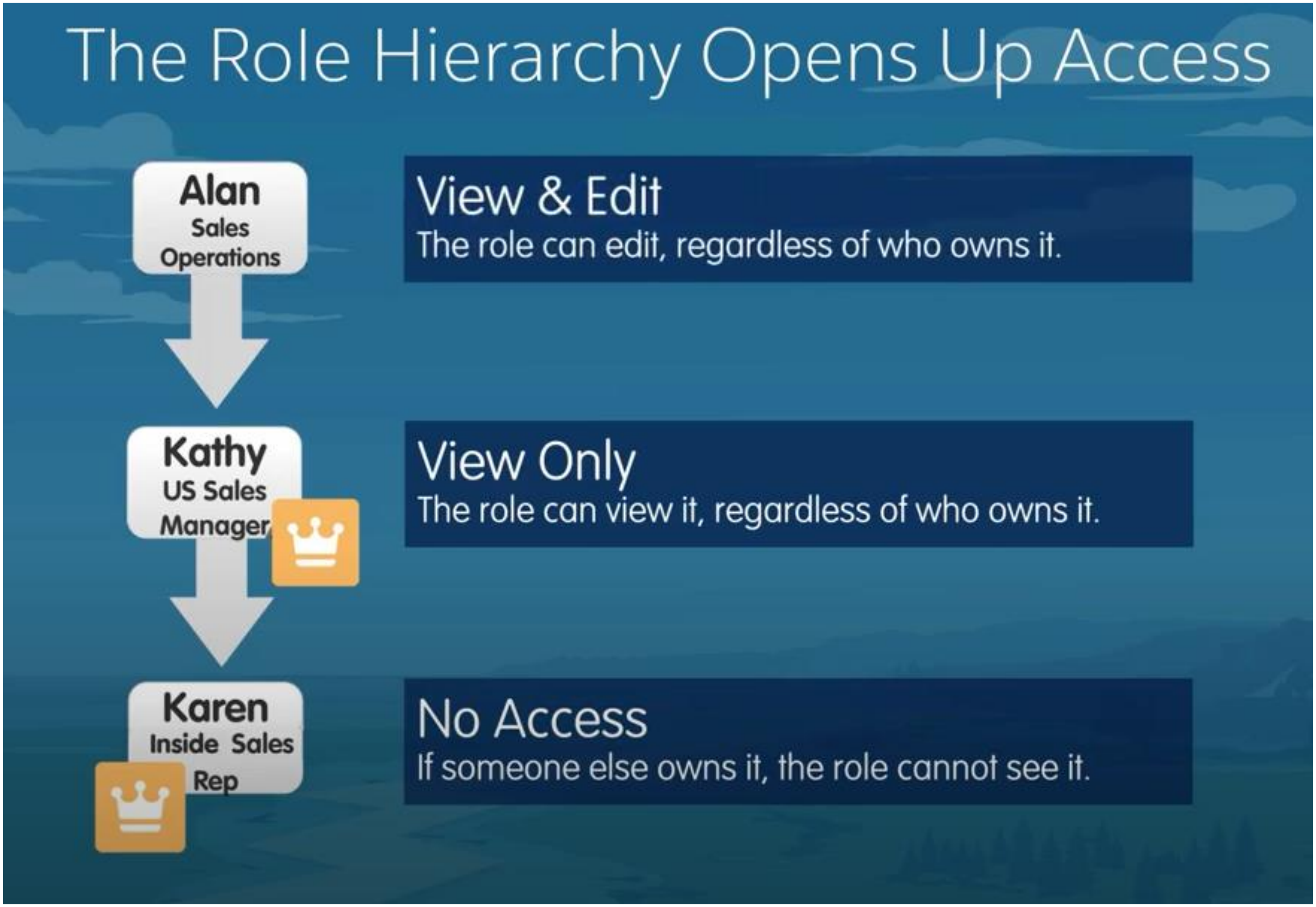
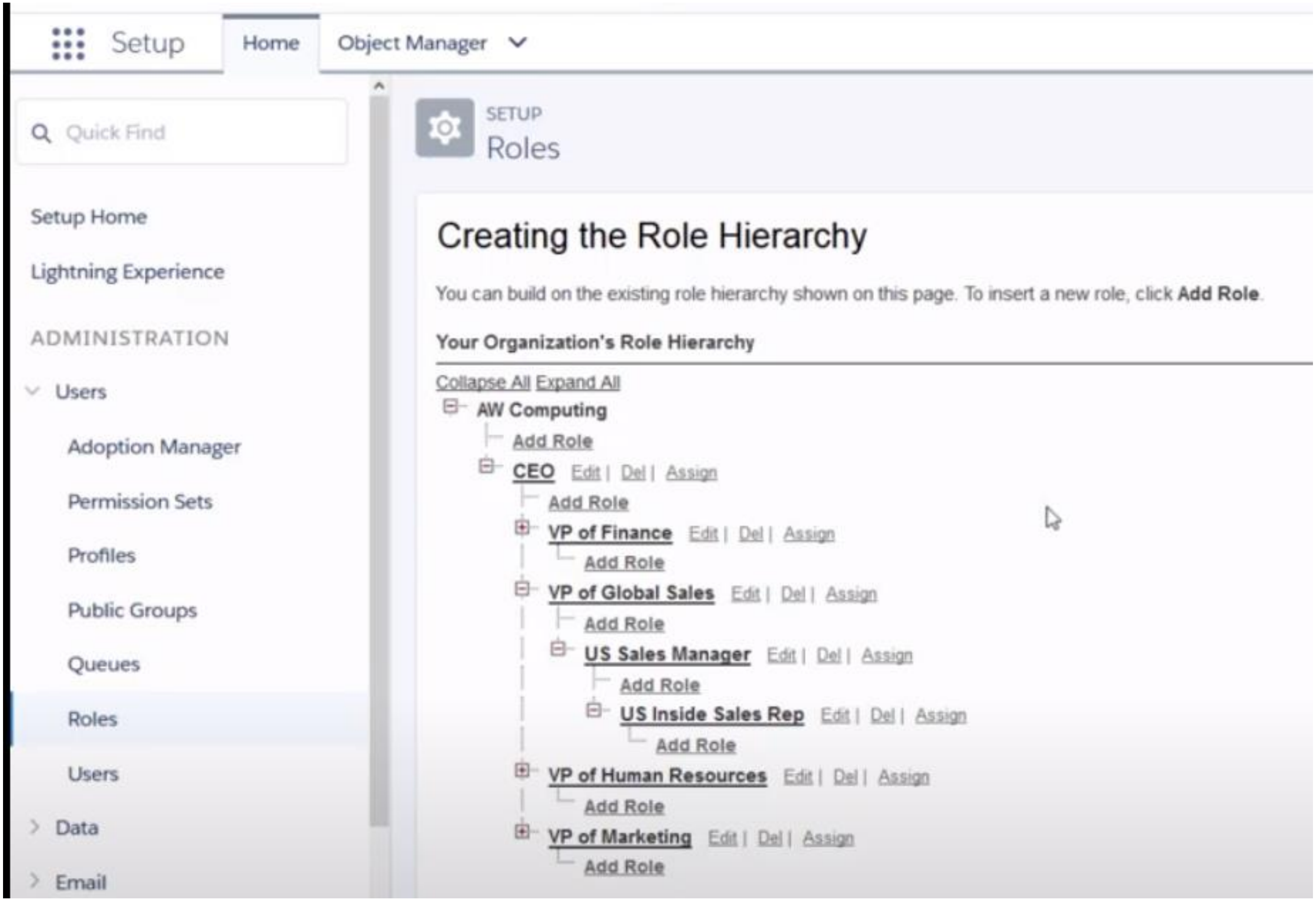
Public Read/Write
CR
Public Read/Write
CONTACTS
All Contacts
No Edit or Delete
New
50+ items • Sorted by Name • Updated a minute ago
NAME
ACCOUNT...
TITLE
POSITION
PHONE
EMAIL
CONTACT...
1 Abby And... Arbuckle ... IT 1-847-55... abby.and... psmit
2 Adam Ave... STC Labs Manager Account ... 65-0443-... adam.ave... psmit
3 Aidan Pla... Starlux H... US Sales ... Account ... 1-914-55... aidan.pla... mwils
4 Alfredo Jo... Nizu-Worl... Manager ... Purchasing 1-888-55... alfredo.jo... abres
6:53 / 7:19

04 Record Access

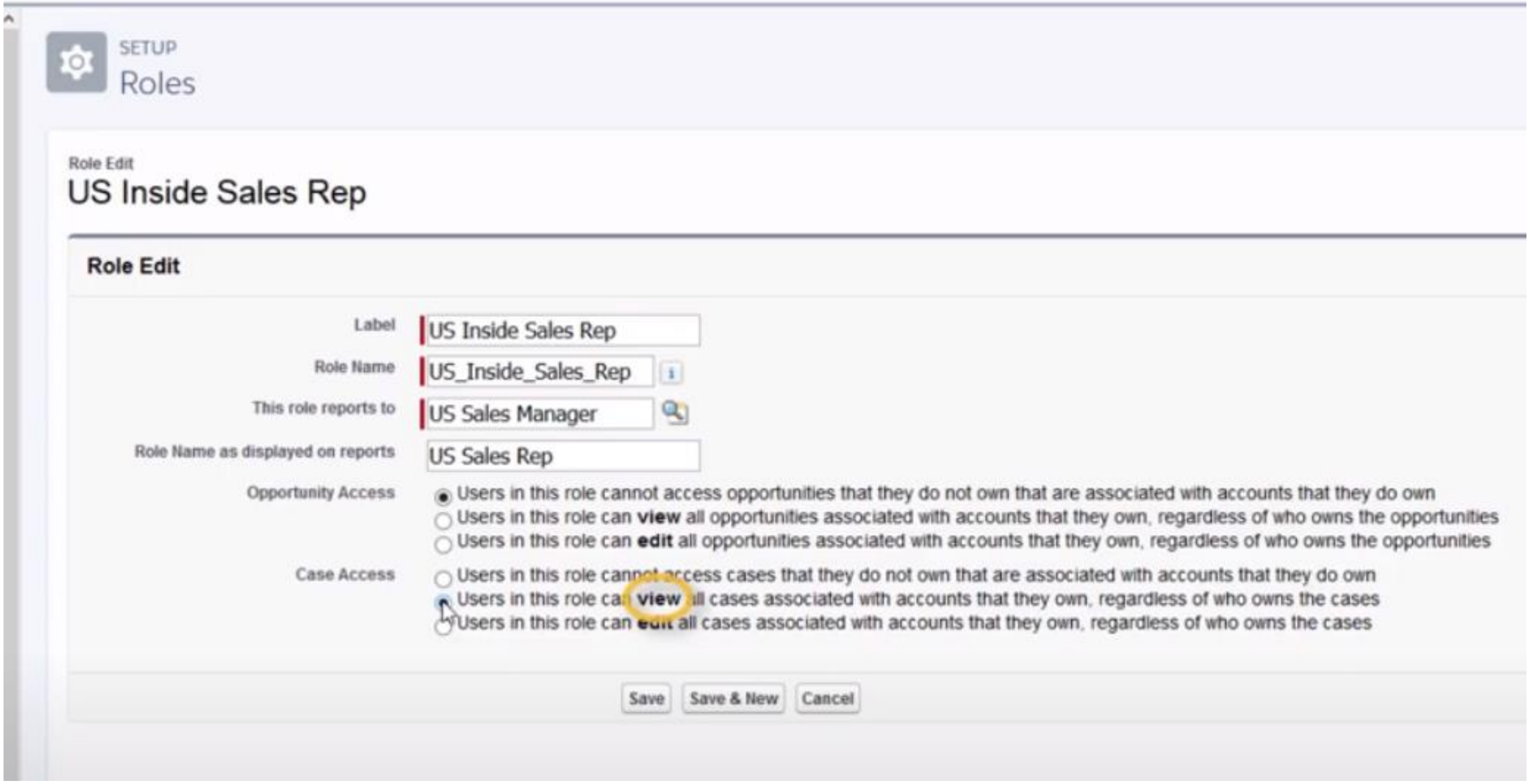


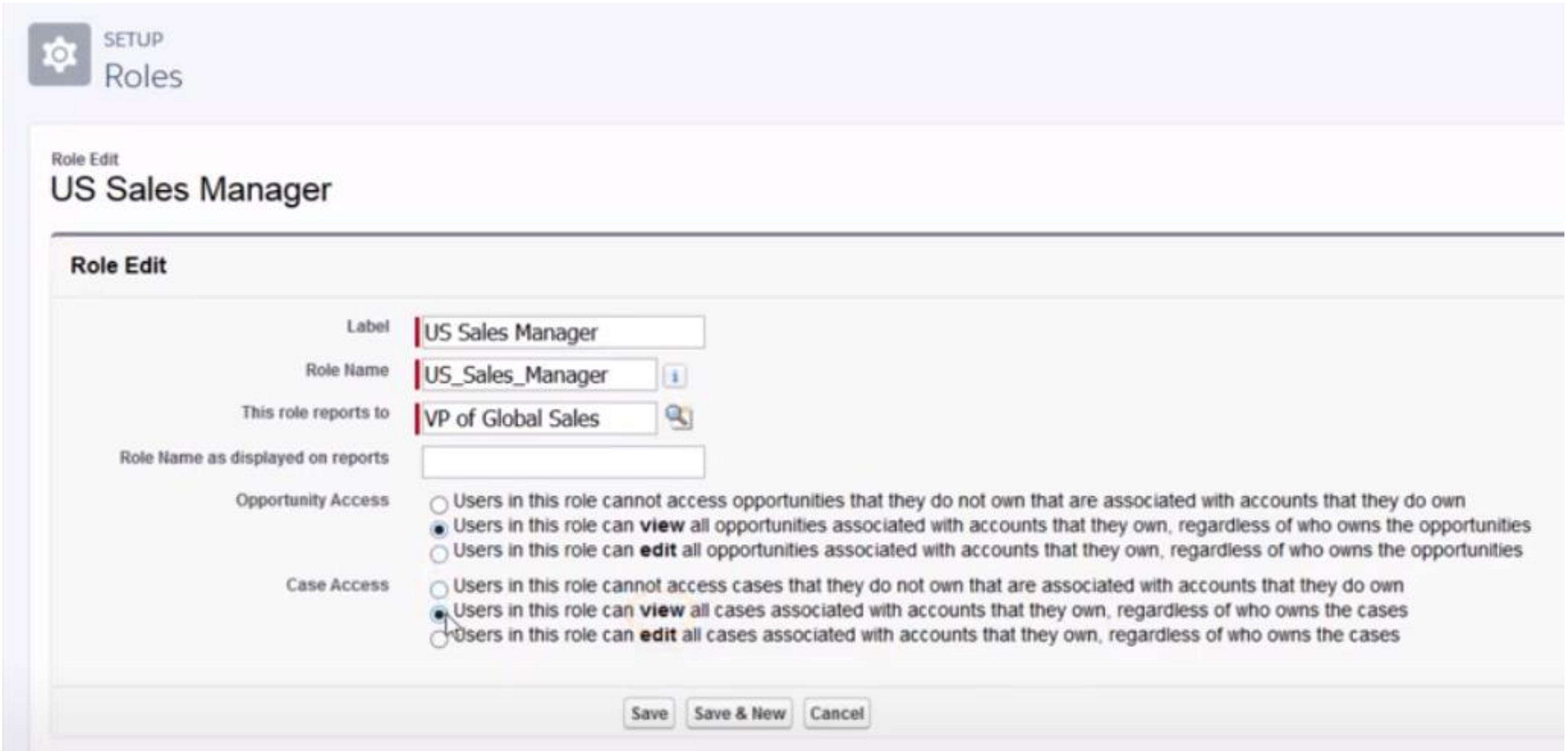
Role Hierarchy – is a way to extend access to Records when OWD sharing settings have been set to anything more restrictive than Public Read/Write.

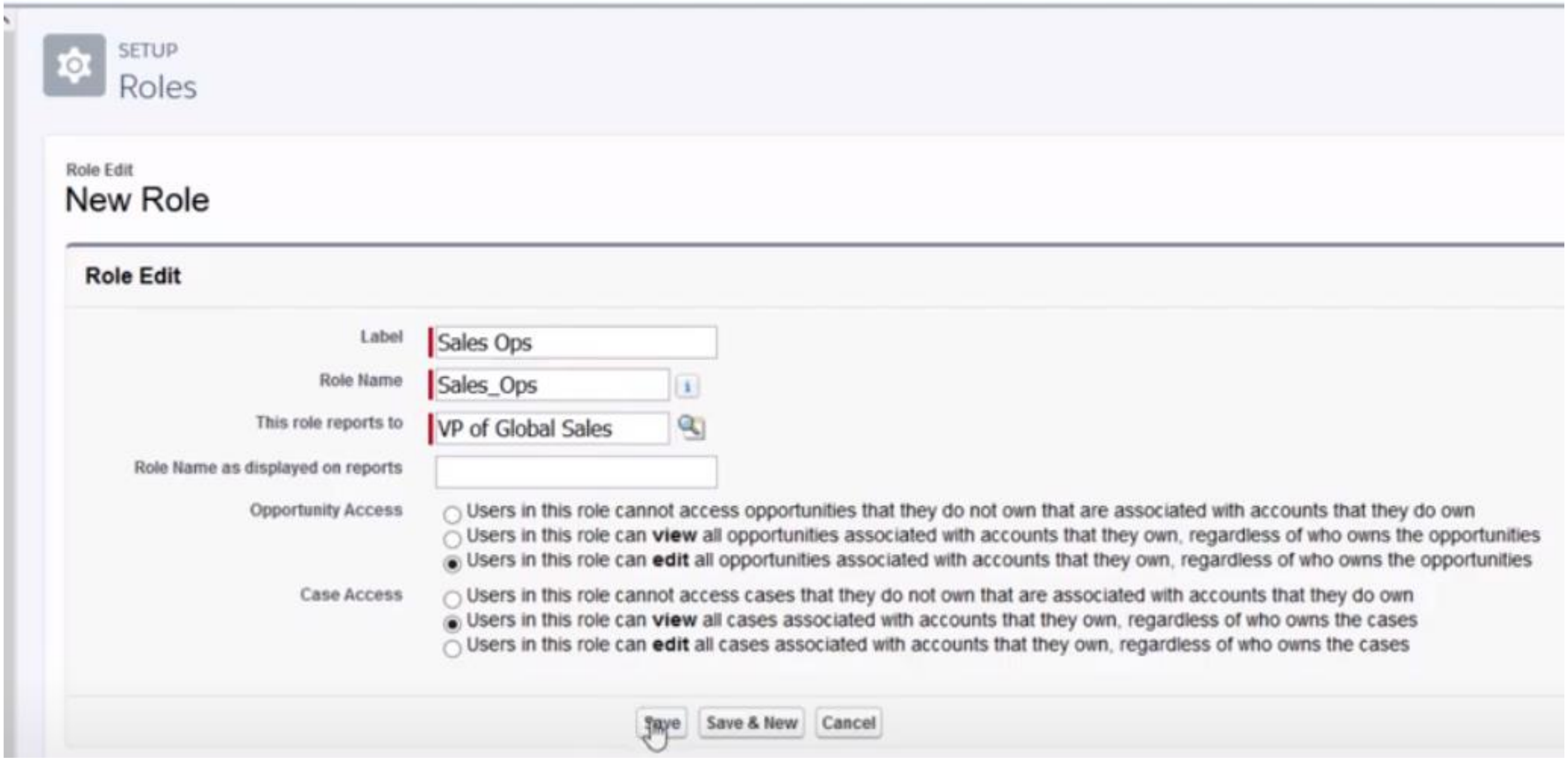

The Role Hierarchy Opens Up Access
Alan
Sales
Operations
View & Edit
The role can edit, regardless of who owns it.
Kathy
US Sales
Manager
View Only
The role can view it, regardless of who owns it.
Karen
Inside Sales
Rep
No Access
If someone else owns it, the role cannot see it.



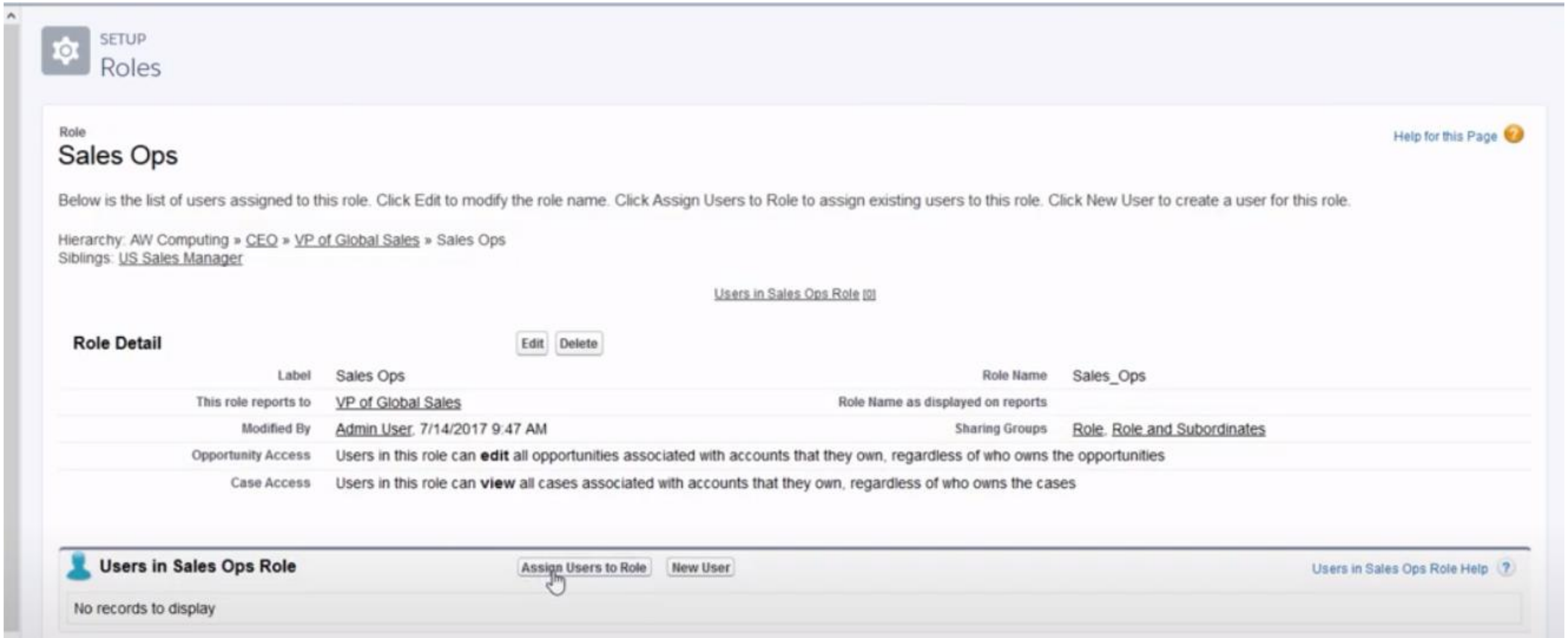
Setup
Home
Object Manager
Quick Find
Setup Home
Lightning Experience
ADMINISTRATION
Users
Adoption Manager
Permission Sets
Profiles
Public Groups
Queues
Roles
Users
Data
Email
SETUP
Roles
Creating the Role Hierarchy
You can build on the existing role hierarchy shown on this page. To insert a new role, click Add Role.
Your Organization's Role Hierarchy
Collapse All Expand All
AW Computing
Add Role
CEO Edit | Del | Assign
Add Role
VP of Finance Edit | Del | Assign
Add Role
VP of Global Sales Edit | Del | Assign
Add Role
US Sales Manager Edit | Del | Assign
Add Role
US Inside Sales Rep Edit | Del | Assign
Add Role
VP of Human Resources Edit | Del | Assign
Add Role
VP of Marketing Edit | Del | Assign
Add Role

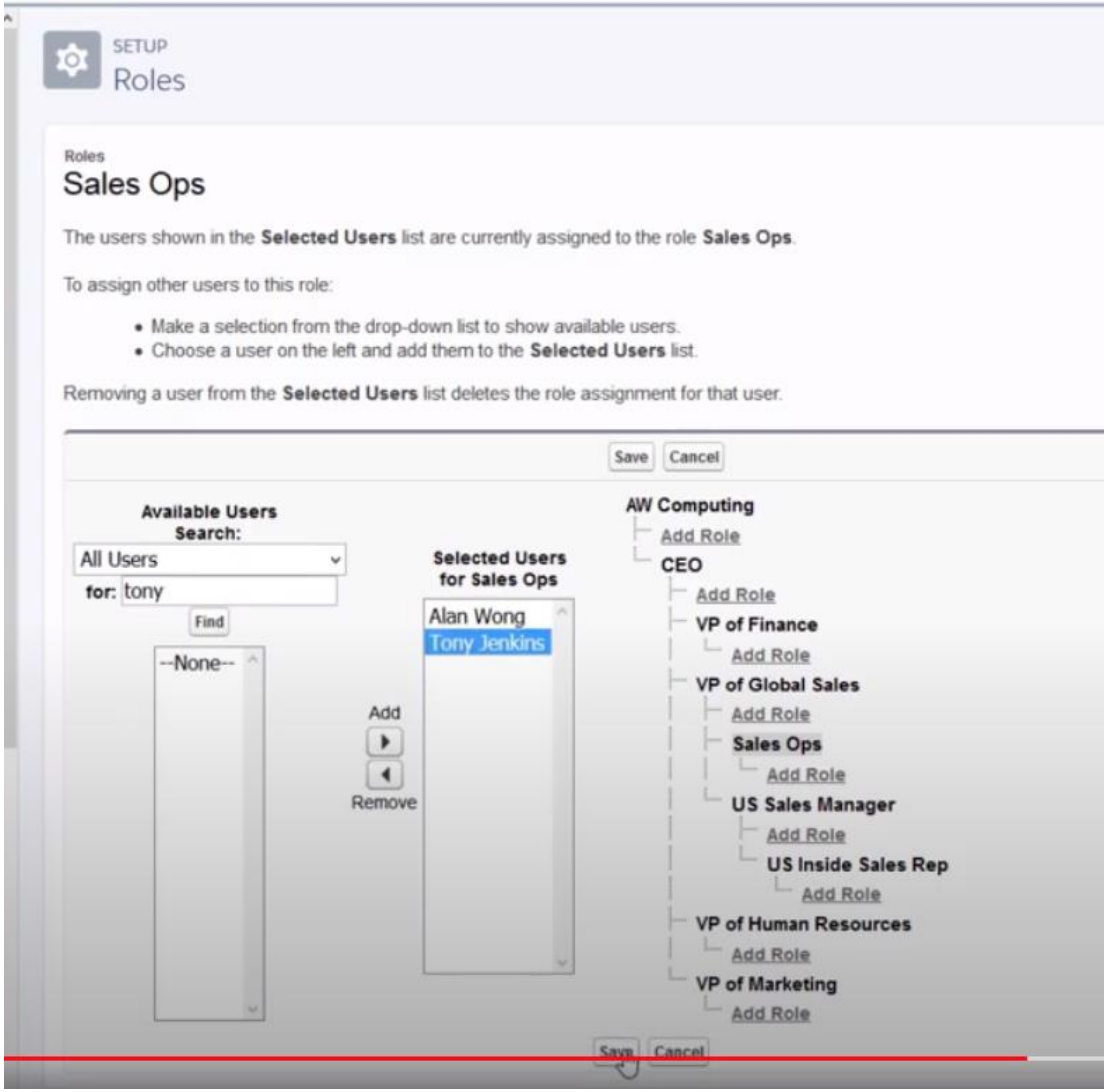

SETUP
Roles
Role Edit
US Inside Sales Rep
Role Edit
Label
US Inside Sales Rep
Role Name
US_Inside_Sales_Rep
This role reports to
US Sales Manager
Role Name as displayed on reports
US Sales Rep
Opportunity Access
Users in this role cannot access opportunities that they do not own that are associated with accounts that they do own
Users in this role can view all opportunities associated with accounts that they own, regardless of who owns the opportunities
Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities
Case Access
Users in this role cannot access cases that they do not own that are associated with accounts that they do own
Users in this role can view all cases associated with accounts that they own, regardless of who owns the cases
Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases
Save
Save & New
Cancel


SETUP
Roles
Role Edit
US Sales Manager
Role Edit
Label
US Sales Manager
Role Name
US_Sales_Manager
This role reports to
VP of Global Sales
Role Name as displayed on reports
Opportunity Access
Users in this role cannot access opportunities that they do not own that are associated with accounts that they do own
Users in this role can view all opportunities associated with accounts that they own, regardless of who owns the opportunities
Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities
Case Access
Users in this role cannot access cases that they do not own that are associated with accounts that they do own
Users in this role can view all cases associated with accounts that they own, regardless of who owns the cases
Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases
Save
Save & New
Cancel

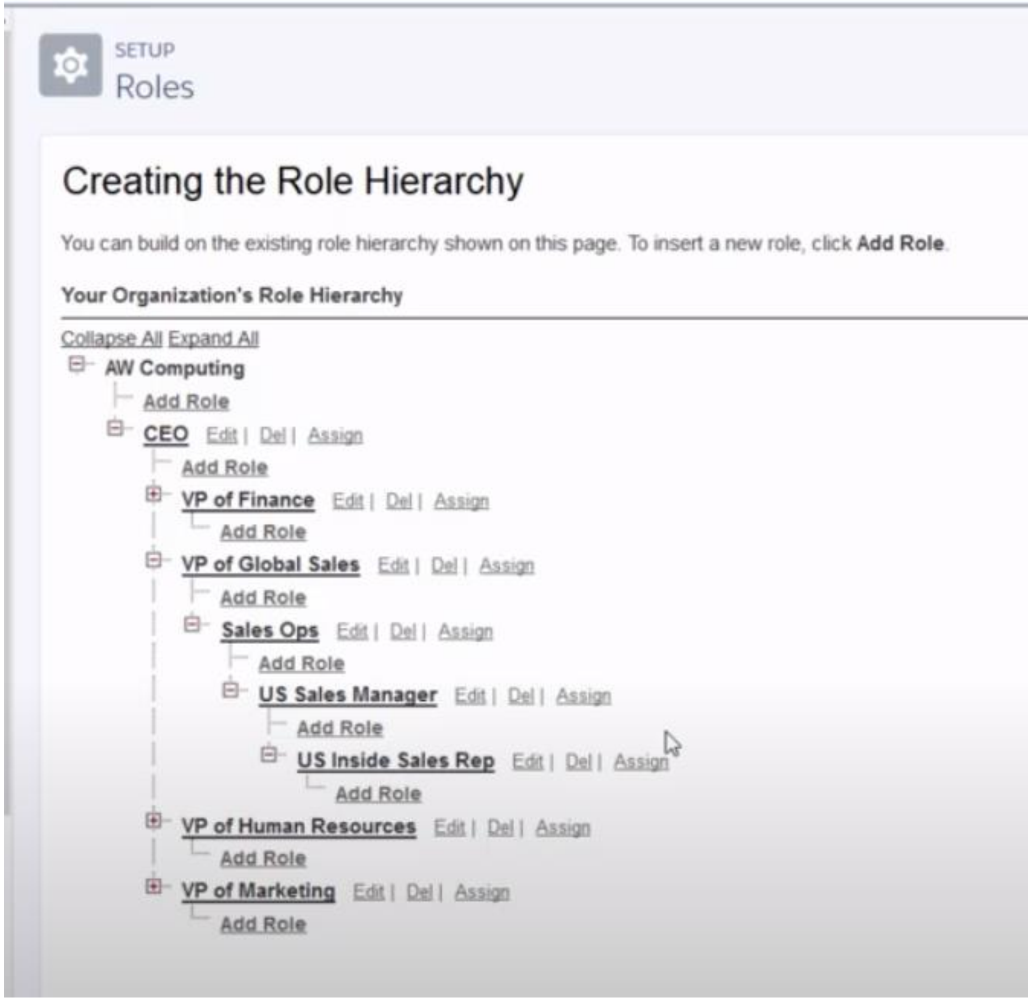


Created a new role – Sales Ops


SETUP
Roles
Role
Sales Ops
Help for this Page
Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.
Hierarchy: AW Computing » CEO » VP of Global Sales » Sales Ops
Siblings: US Sales Manager
Users in Sales Ops Role [0]
Role Detail
Edit
Delete
Label
Sales Ops
Role Name
Sales_Ops
This role reports to
VP of Global Sales
Role Name as displayed on reports
Modified By
Admin User, 7/14/2017 9:47 AM
Sharing Groups
Role, Role and Subordinates
Opportunity Access
Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities
Case Access
Users in this role can view all cases associated with accounts that they own, regardless of who owns the cases
Users in Sales Ops Role
Assign Users to Role
New User
Users in Sales Ops Role Help
No records to display



Assign users to Role



Moved roles – assigned Sales Ops to VP of Global Sales; assigned US Sales Manger tree to Sales Ops

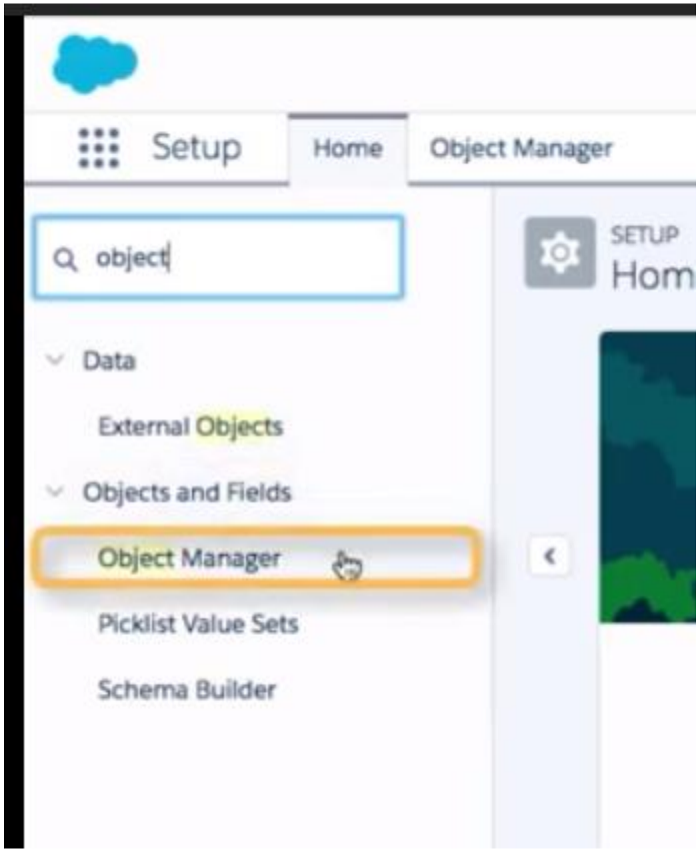
How Do the Layers Work?

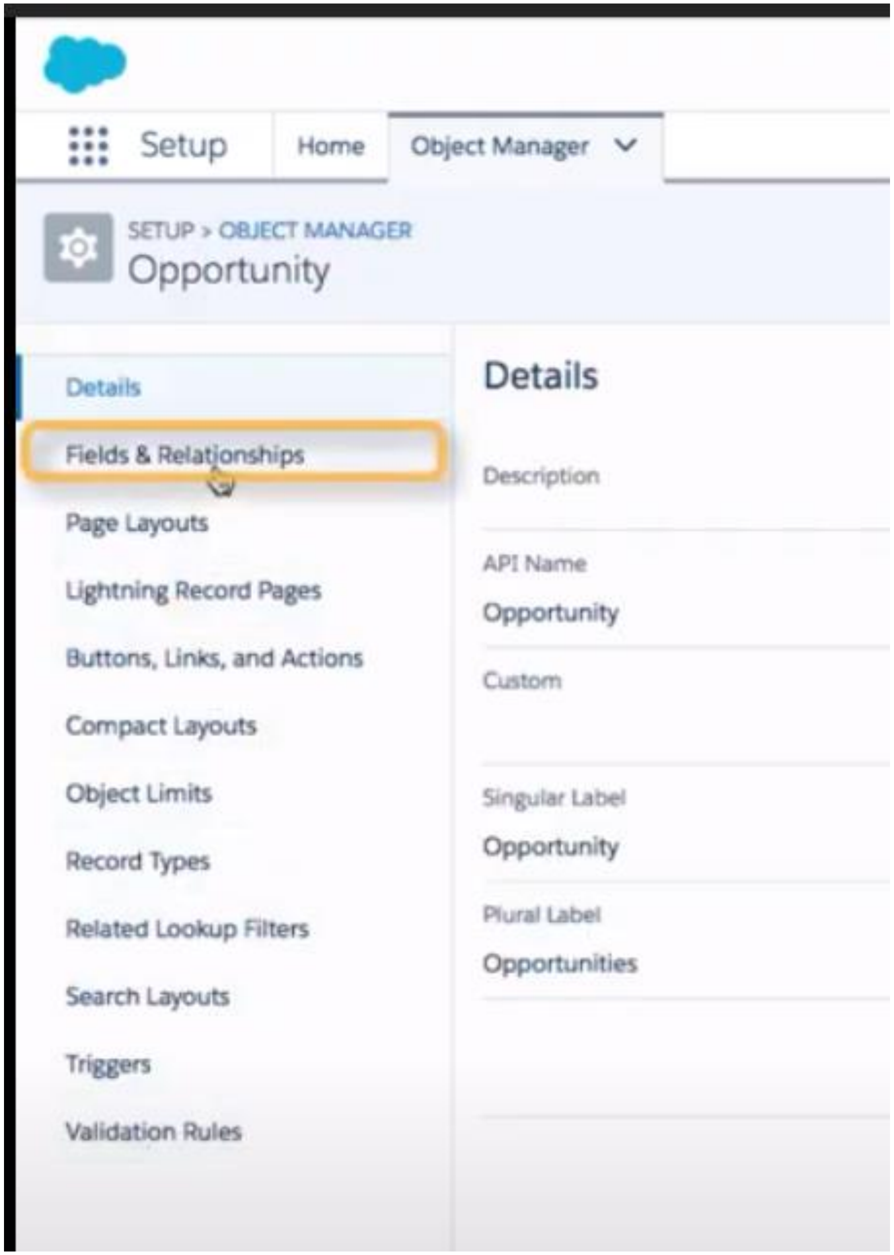
Baseline Access	Records You Don't Own		
Profile	**OWD**	**Access via Role Hierarchy**	
CRED	Private	No Access View View + Edit	Can grant any of the three access options.
CR	Private	No Access View ~~View + Edit~~	Can NOT grant a user more access than they have through their profile permissions.
CRED	Public Read Only	View View + Edit	"No Access" does Not appear; Role hierarchy can only open access to records; It can NOT restrict record access to less than what is granted through the OWD.
CR	Public Read Only	View ~~View + Edit~~	Read only, no edit permissions on profile.
CRED Full Permissions (A)	Public Read/Write Use of (A)	Not necessary	
CR Read Permission (B)	Public Read/Write Use of (B)	Not necessary	

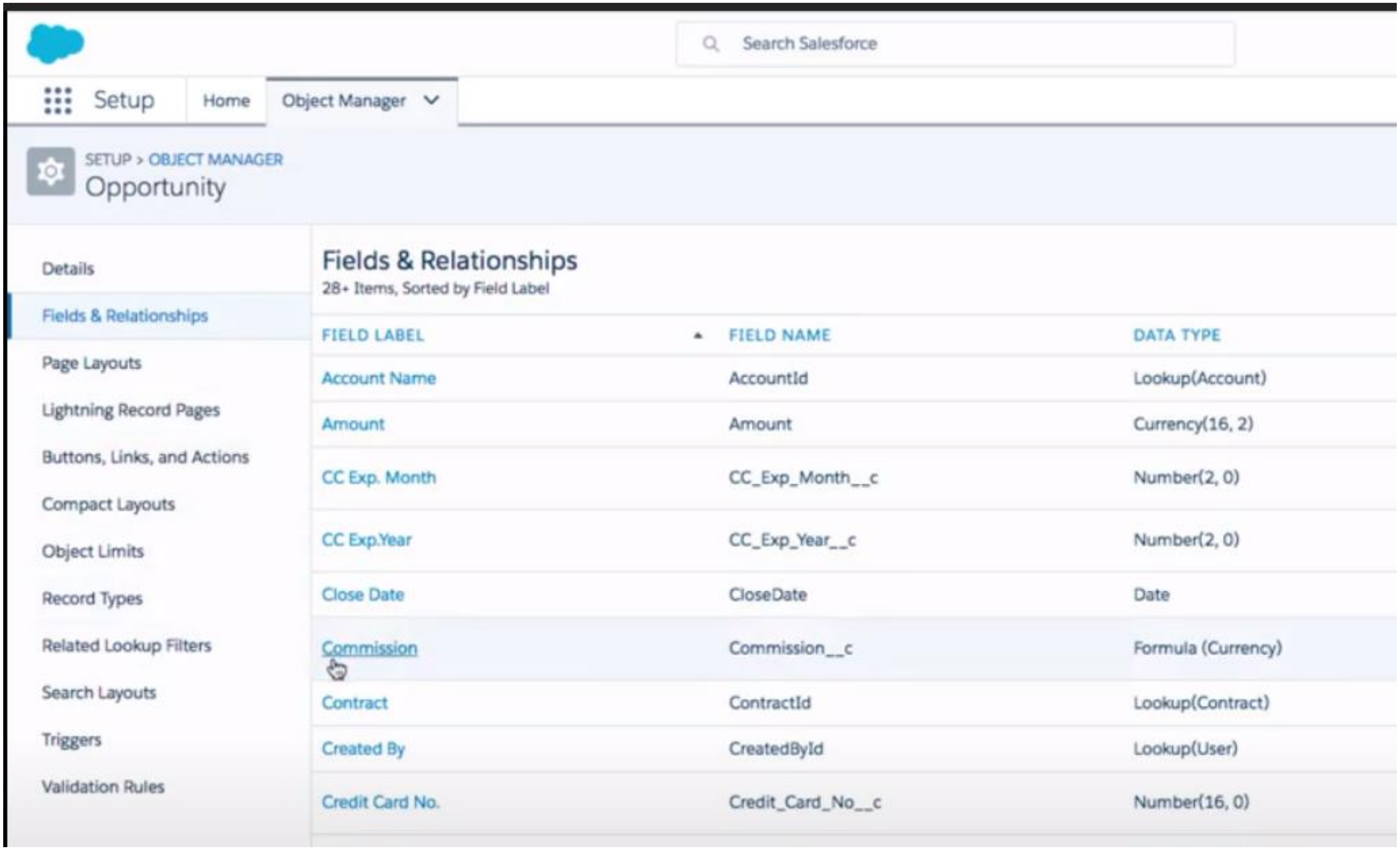
Status of AW Org Security Configuration:

05 Field Level Security


FIELD
ACCESS
FIELD LEVEL SECURITY

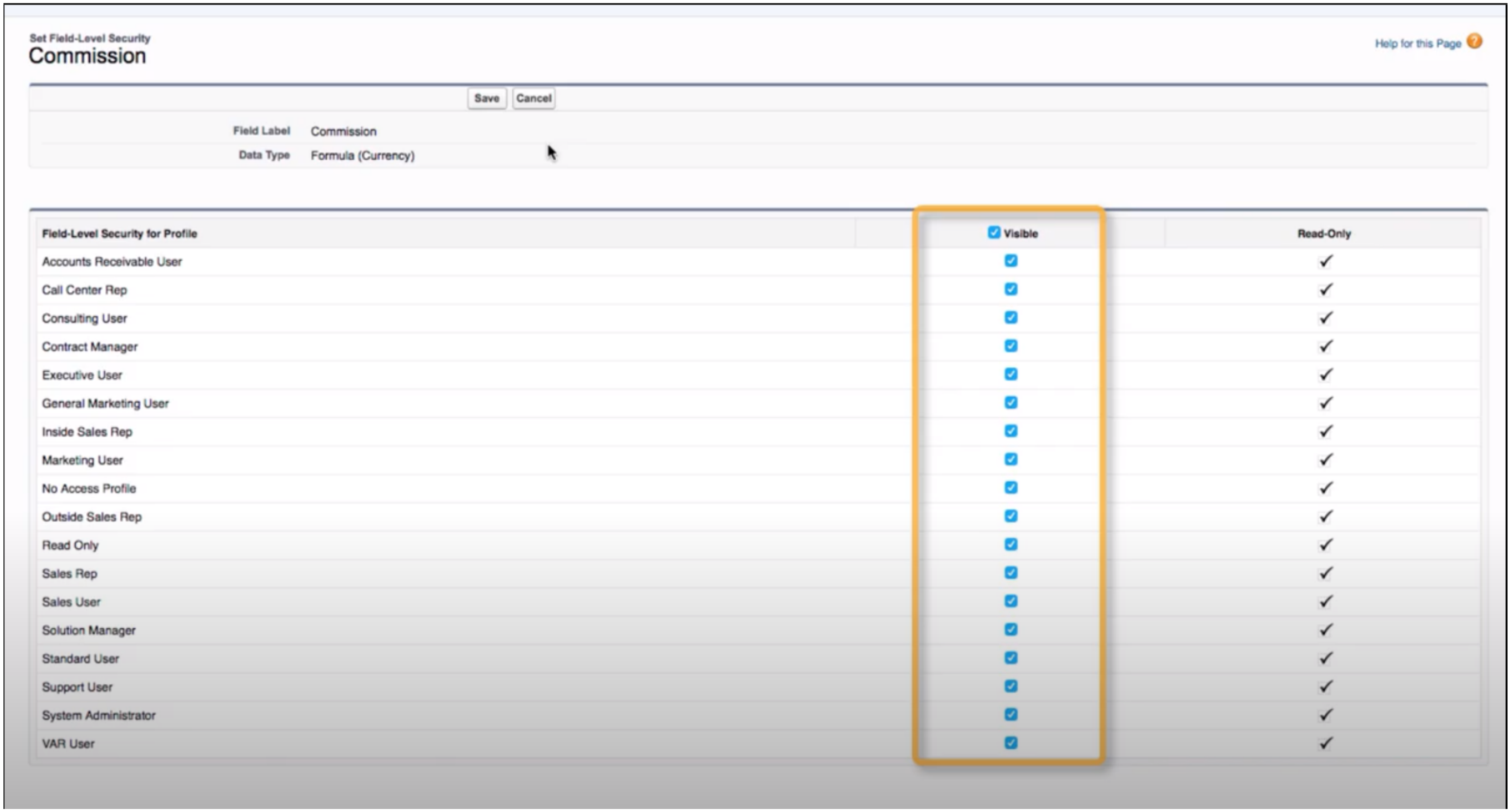

Setup
Home
Object Manager
object
SETUP
Hom
Data
External Objects
Objects and Fields
Object Manager
Picklist Value Sets
Schema Builder


Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Opportunity
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Object Limits
Record Types
Related Lookup Filters
Search Layouts
Triggers
Validation Rules
Details
Description
API Name
Opportunity
Custom
Singular Label
Opportunity
Plural Label
Opportunities

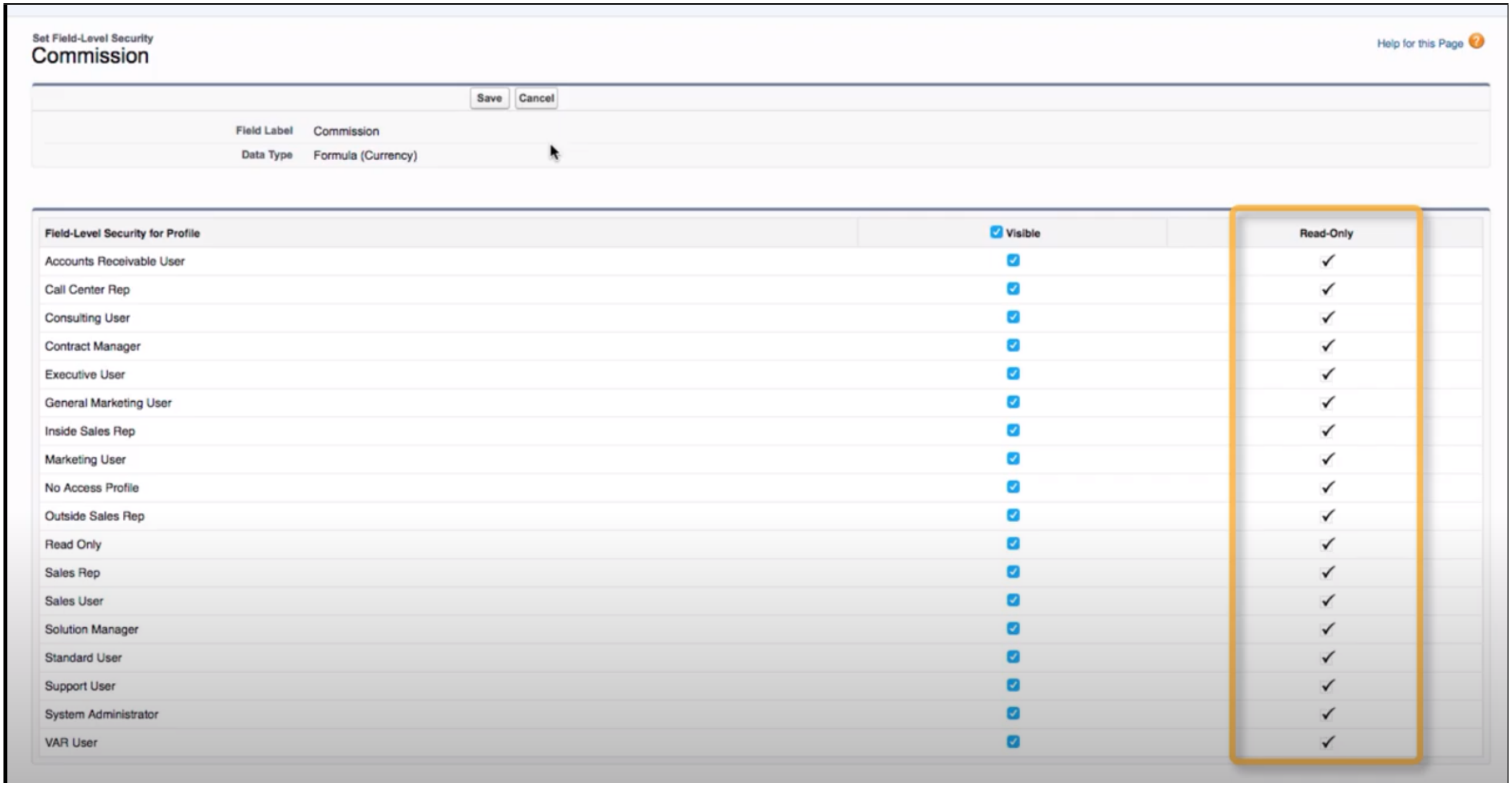

Search Salesforce
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Opportunity
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Object Limits
Record Types
Related Lookup Filters
Search Layouts
Triggers
Validation Rules
Fields & Relationships
28+ Items, Sorted by Field Label
FIELD LABEL
FIELD NAME
DATA TYPE
Account Name
AccountId
Lookup(Account)
Amount
Amount
Currency(16, 2)
CC Exp. Month
CC_Exp_Month__c
Number(2, 0)
CC Exp.Year
CC_Exp_Year__c
Number(2, 0)
Close Date
CloseDate
Date
Commission
Commission__c
Formula (Currency)
Contract
ContractId
Lookup(Contract)
Created By
CreatedById
Lookup(User)
Credit Card No.
Credit_Card_No__c
Number(16, 0)

Click <Set Field-Level Security>.

Visible to every profile on any opportunity user has access to.

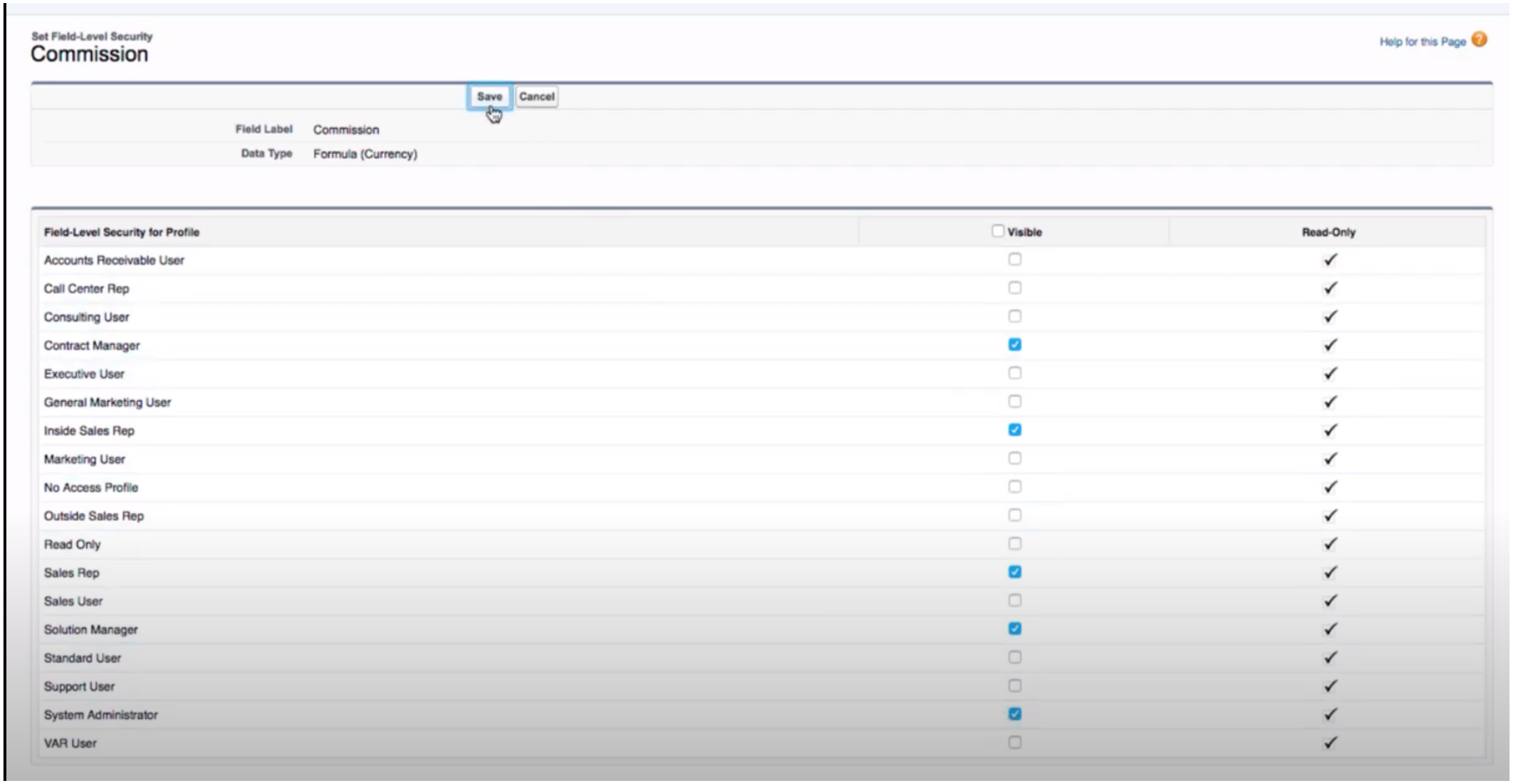


Check the Read-Only box, allows you to limit access to this specific field, even if a user has edit permission on the object. Note that field level security overrides both the “Modify All” data and “View All” data user permissions.

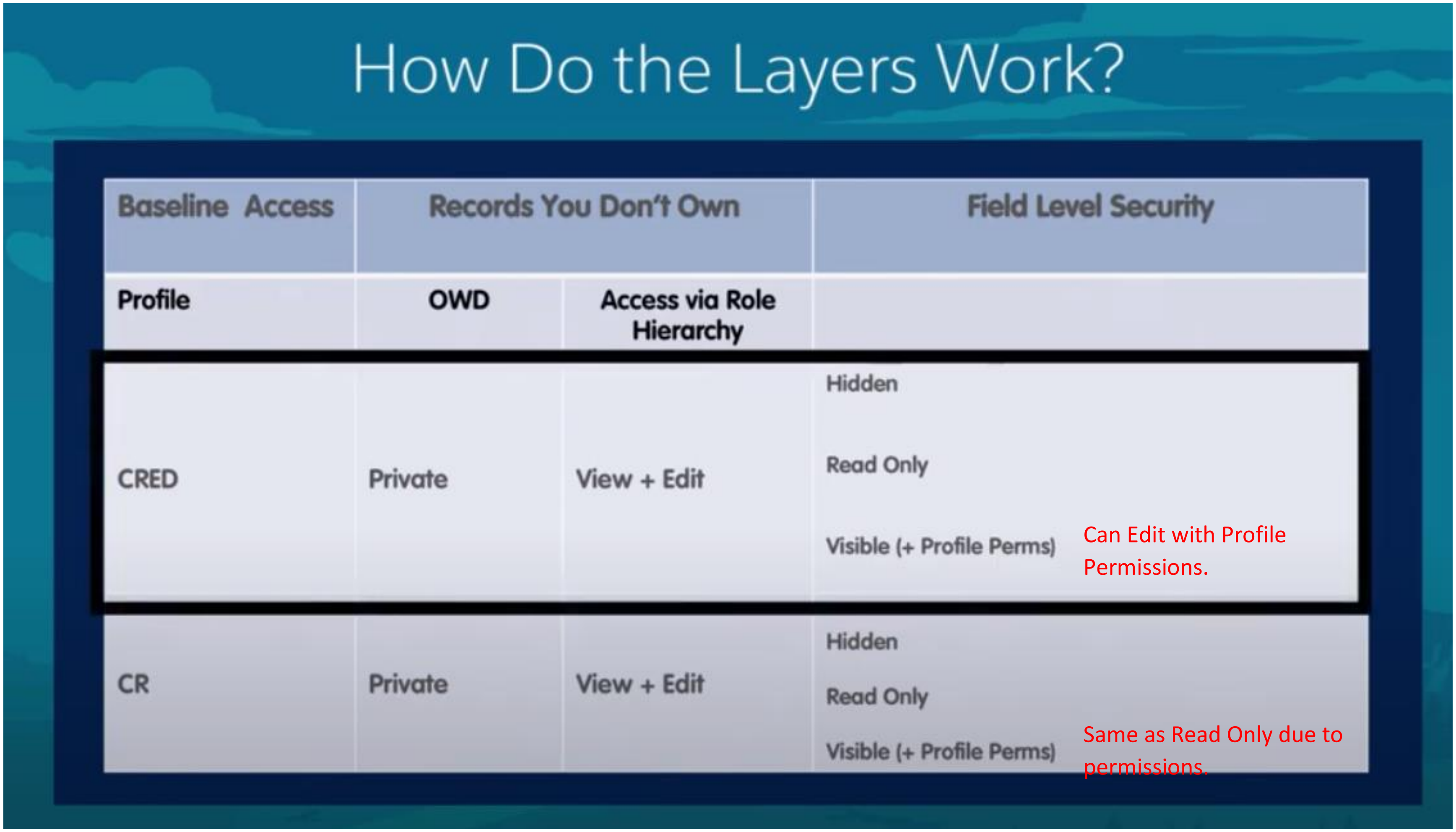


Note: Field Level Security overrides both “Modify All Data” and “View All Data” User Permissions.

Restricting access to sales reps and managers and System Administrator:



Only users that need access will be able to access the Commission field.

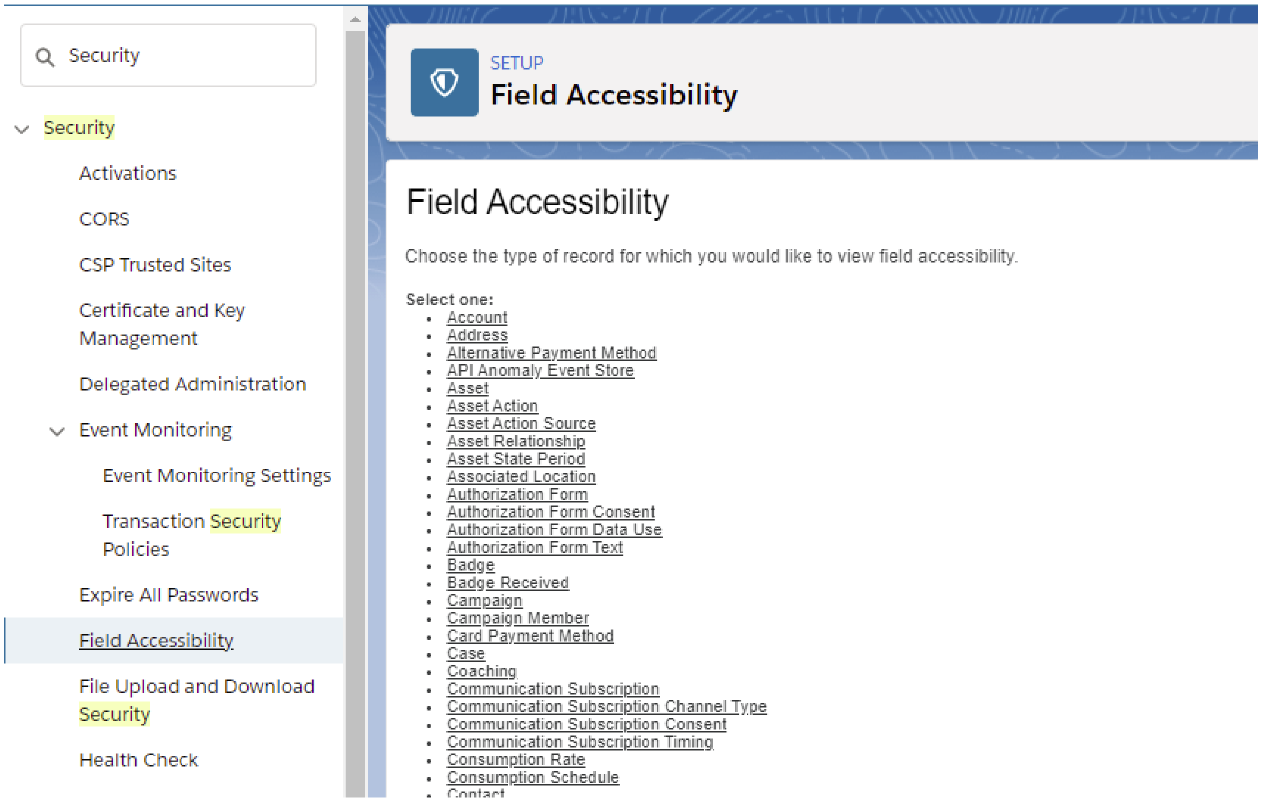


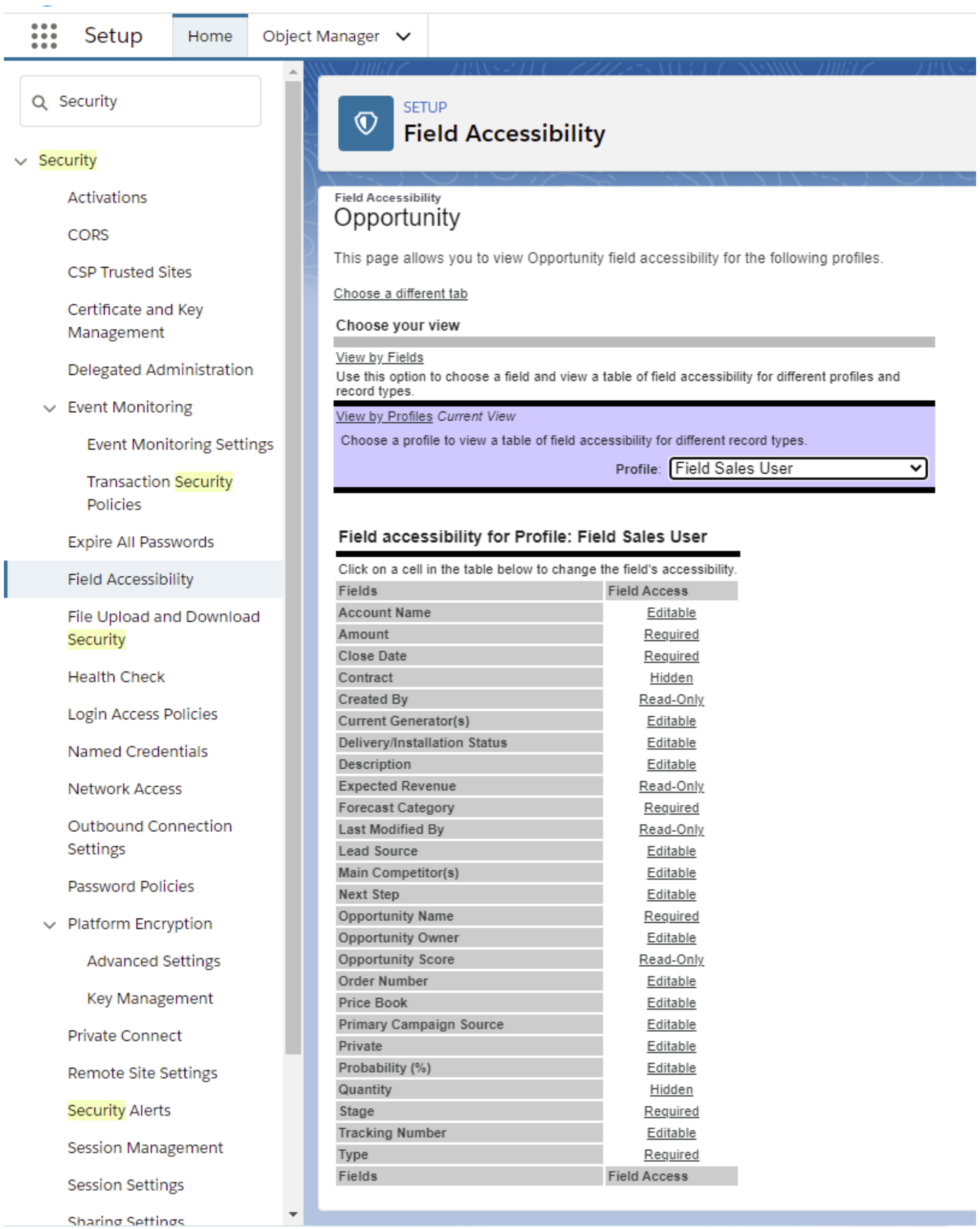
How Do the Layers Work?

Baseline Access	Records You Don't Own		Field Level Security	
Profile	OWD	Access via Role Hierarchy		
CRED	Private	View + Edit	Hidden Read Only Visible (+ Profile Perms)	Can Edit with Profile Permissions.
CR	Private	View + Edit	Hidden Read Only Visible (+ Profile Perms)	Same as Read Only due to permissions.

Role Hierarchy nor Field Level Security can grant more permissions than baseline profile permissions.

From the Overview, alternate way to manage Field Accessibility:

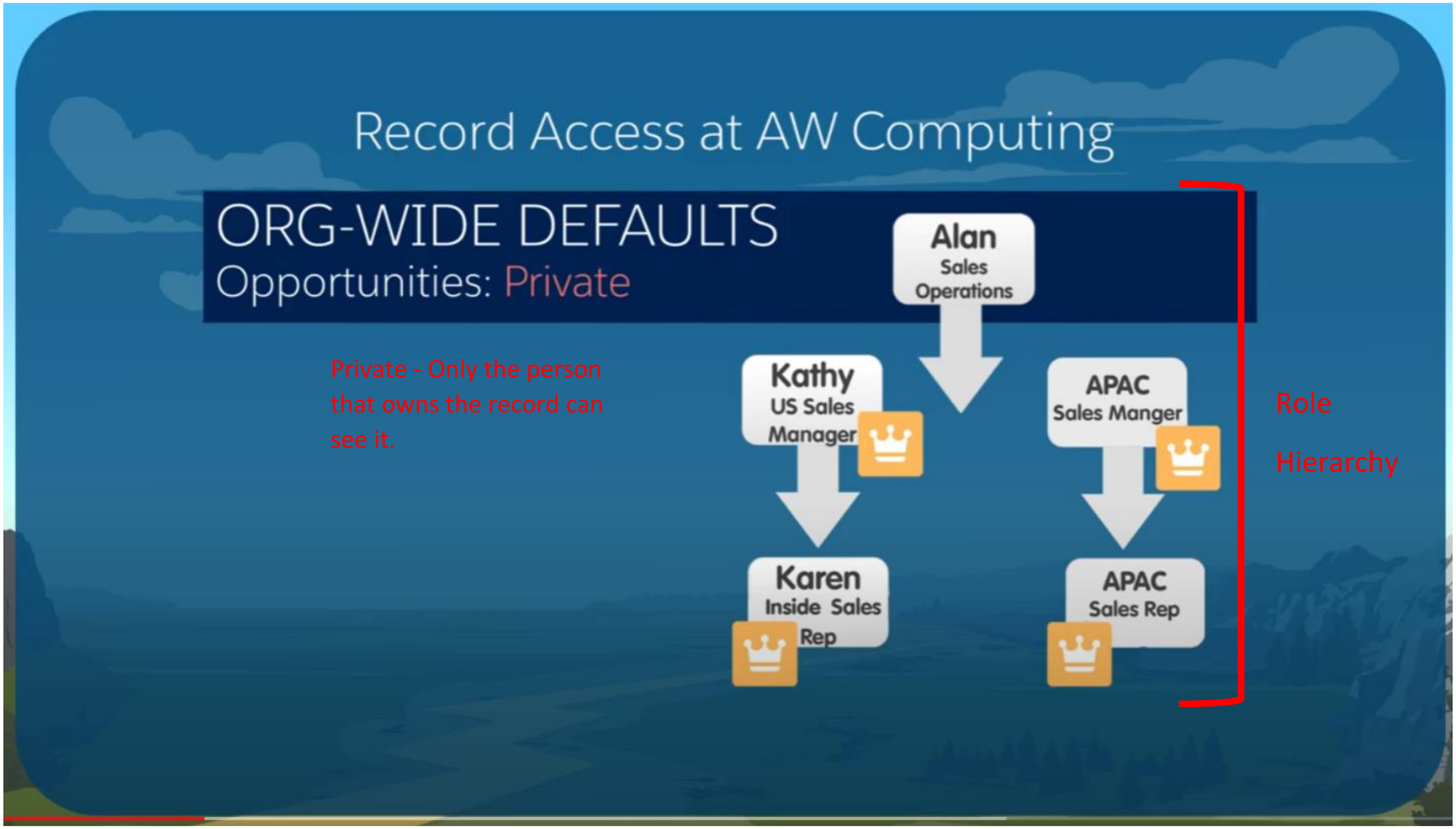




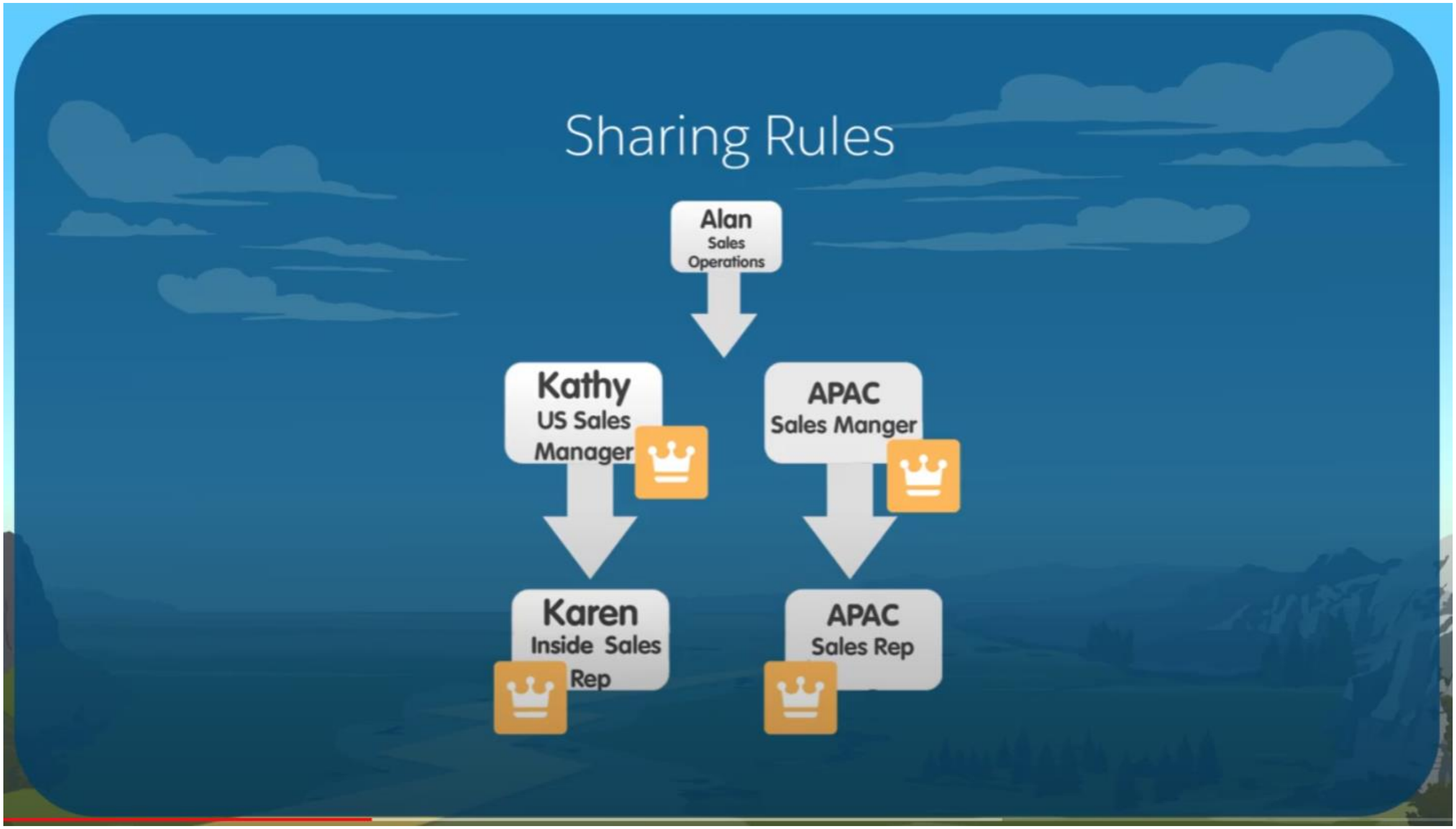
Fields	Field Access
Account Name	Editable
Amount	Required
Close Date	Required
Contract	Hidden
Created By	Read-Only
Current Generator(s)	Editable
Delivery/Installation Status	Editable
Description	Editable
Expected Revenue	Read-Only
Forecast Category	Required
Last Modified By	Read-Only
Lead Source	Editable
Main Competitor(s)	Editable
Next Step	Editable
Opportunity Name	Required
Opportunity Owner	Editable
Opportunity Score	Read-Only
Order Number	Editable
Price Book	Editable
Primary Campaign Source	Editable
Private	Editable
Probability (%)	Editable
Quantity	Hidden
Stage	Required
Tracking Number	Editable
Type	Required
Fields	Field Access

06 Record Access Via Sharing Rules

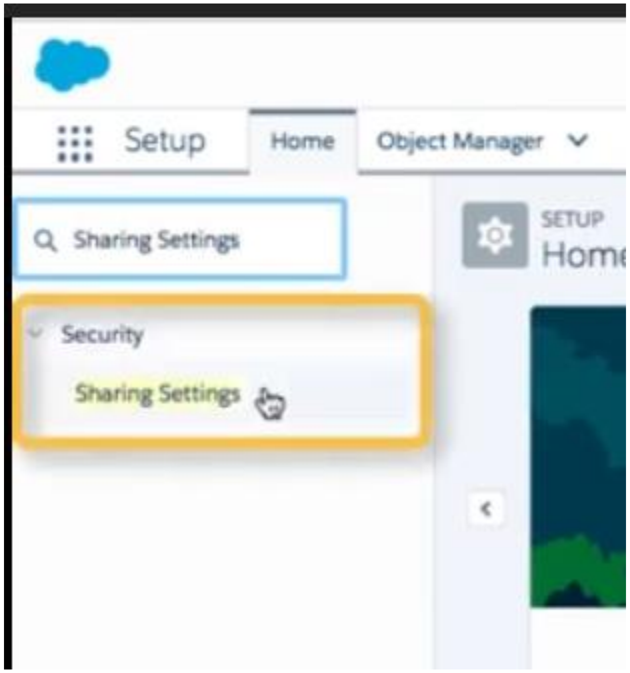
Implementing Sharing Rules to open record access up to users when the Org-Wide Defaults are more restrictive than Public Read/Write.

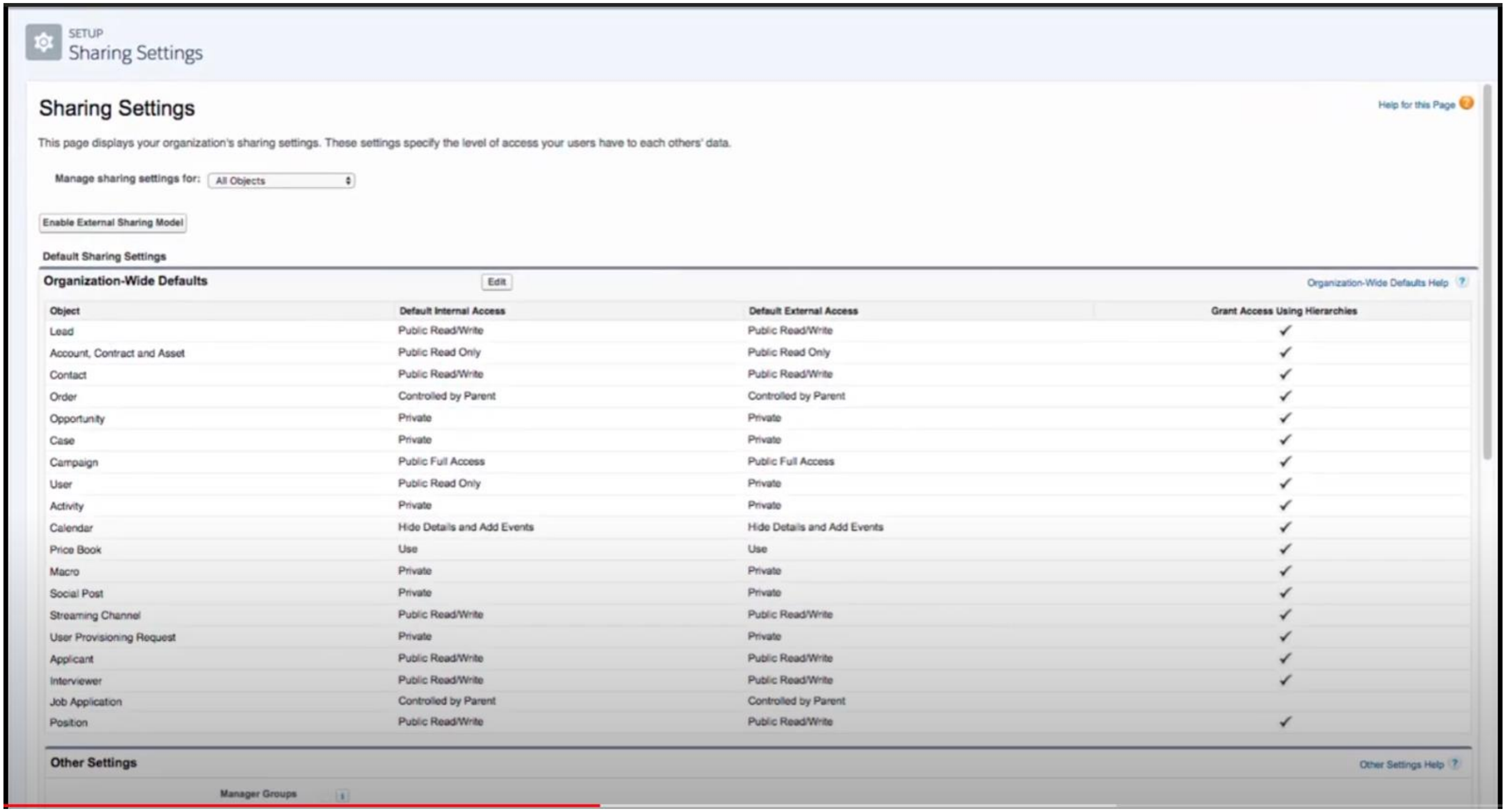


Role Hierarchy allowed to open record access vertically.



Need a way to extend record access horizontally. US Manager can see APAC Sales Manager and subordinates' records. APAC Sales Manager can see US Sales Manager and subordinates' records. Sharing Rules allow access to be extended access to Users, Roles, Public Groups, or Territories regardless of their place in the Role Hierarchy.


Setup
Home
Object Manager
Sharing Settings
Security
Sharing Settings
SETUP
Home



SETUP
Sharing Settings

Sharing Settings

Help for this Page

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data.

Manage sharing settings for: All Objects

Enable External Sharing Model

Default Sharing Settings

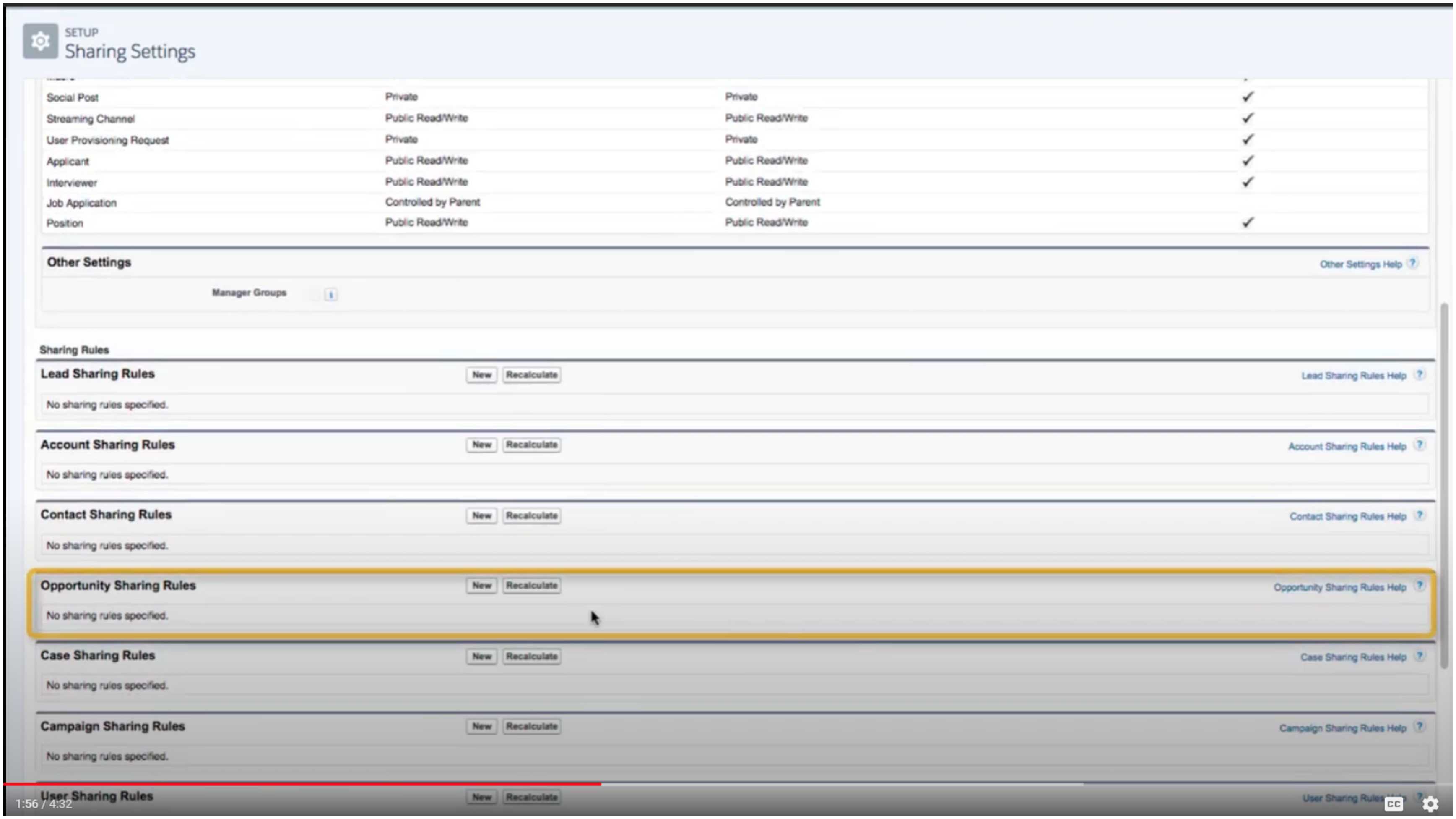
Organization-Wide Defaults Edit Organization-Wide Defaults Help

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write	Public Read/Write	✓
Account, Contract and Asset	Public Read Only	Public Read Only	✓
Contact	Public Read/Write	Public Read/Write	✓
Order	Controlled by Parent	Controlled by Parent	✓
Opportunity	Private	Private	✓
Case	Private	Private	✓
Campaign	Public Full Access	Public Full Access	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓
Price Book	Use	Use	✓
Macro	Private	Private	✓
Social Post	Private	Private	✓
Streaming Channel	Public Read/Write	Public Read/Write	✓
User Provisioning Request	Private	Private	✓
Applicant	Public Read/Write	Public Read/Write	✓
Interviewer	Public Read/Write	Public Read/Write	✓
Job Application	Controlled by Parent	Controlled by Parent	
Position	Public Read/Write	Public Read/Write	✓

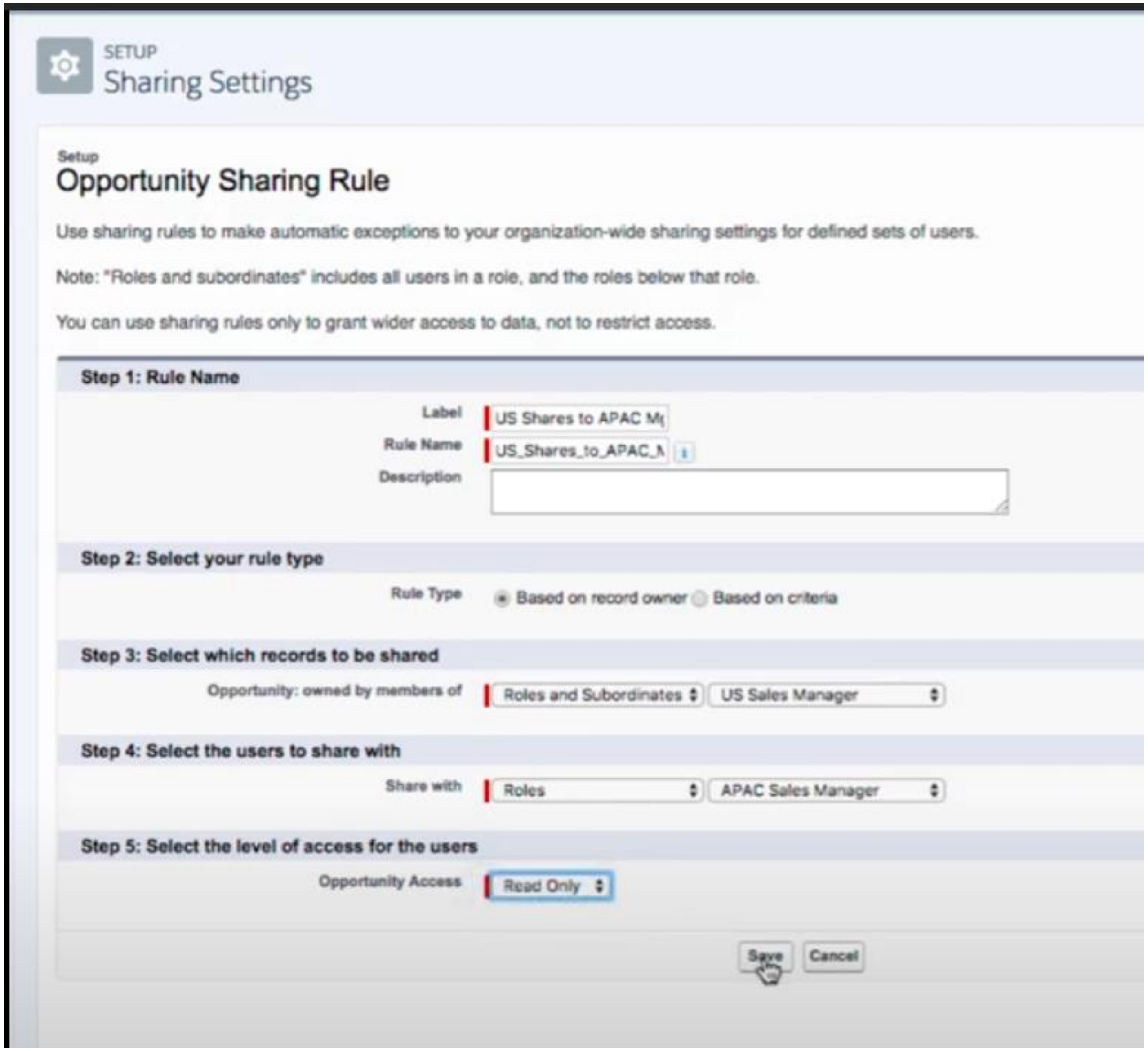
Other Settings Other Settings Help

Manager Groups

Now, you must scroll down to the Opportunity Sharing Rules. Click New.

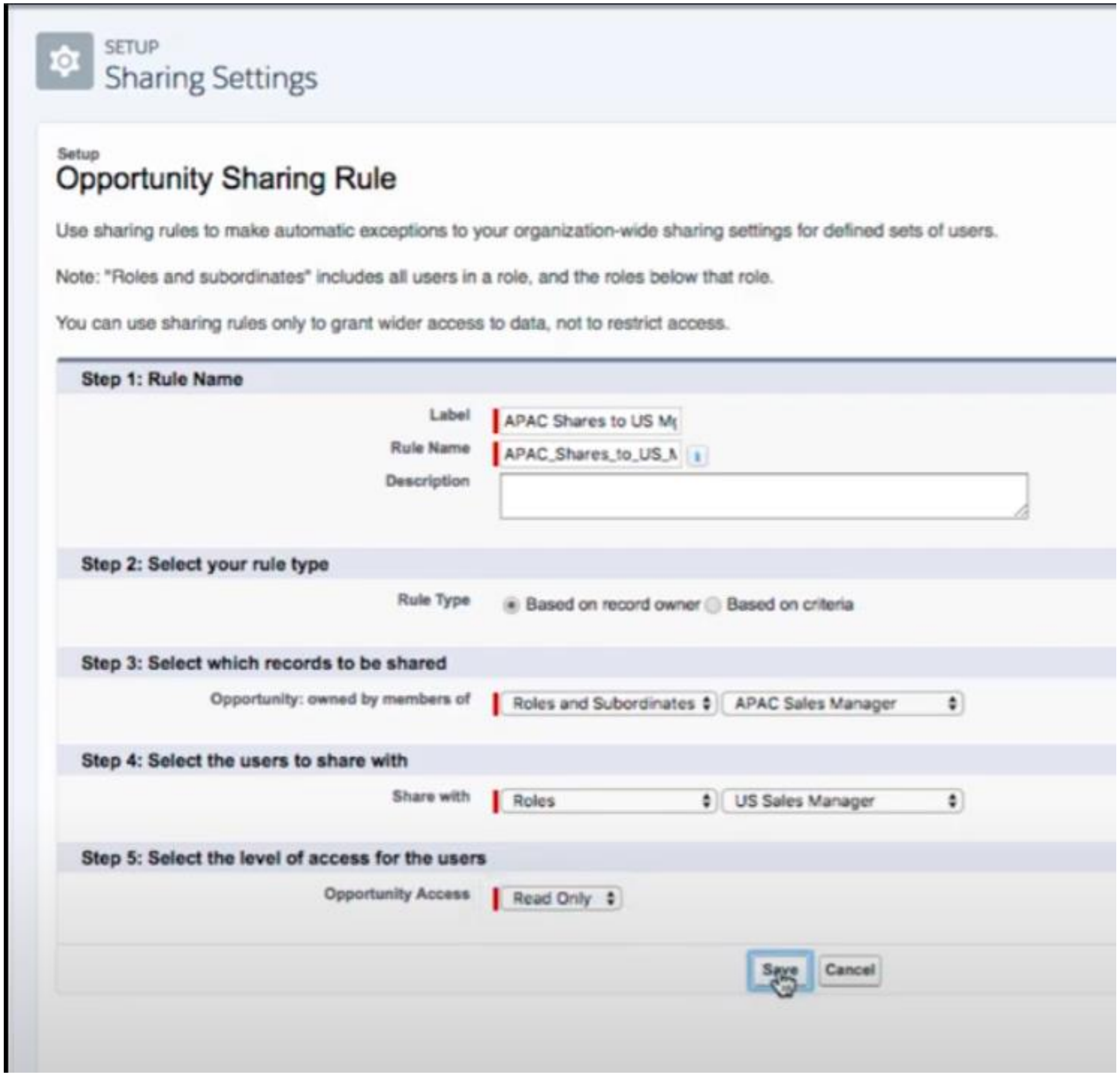


Sharing Roles and Subordinates of US Sales Manager with Roles of APAC Sales Manager Opportunity, Access Read Only



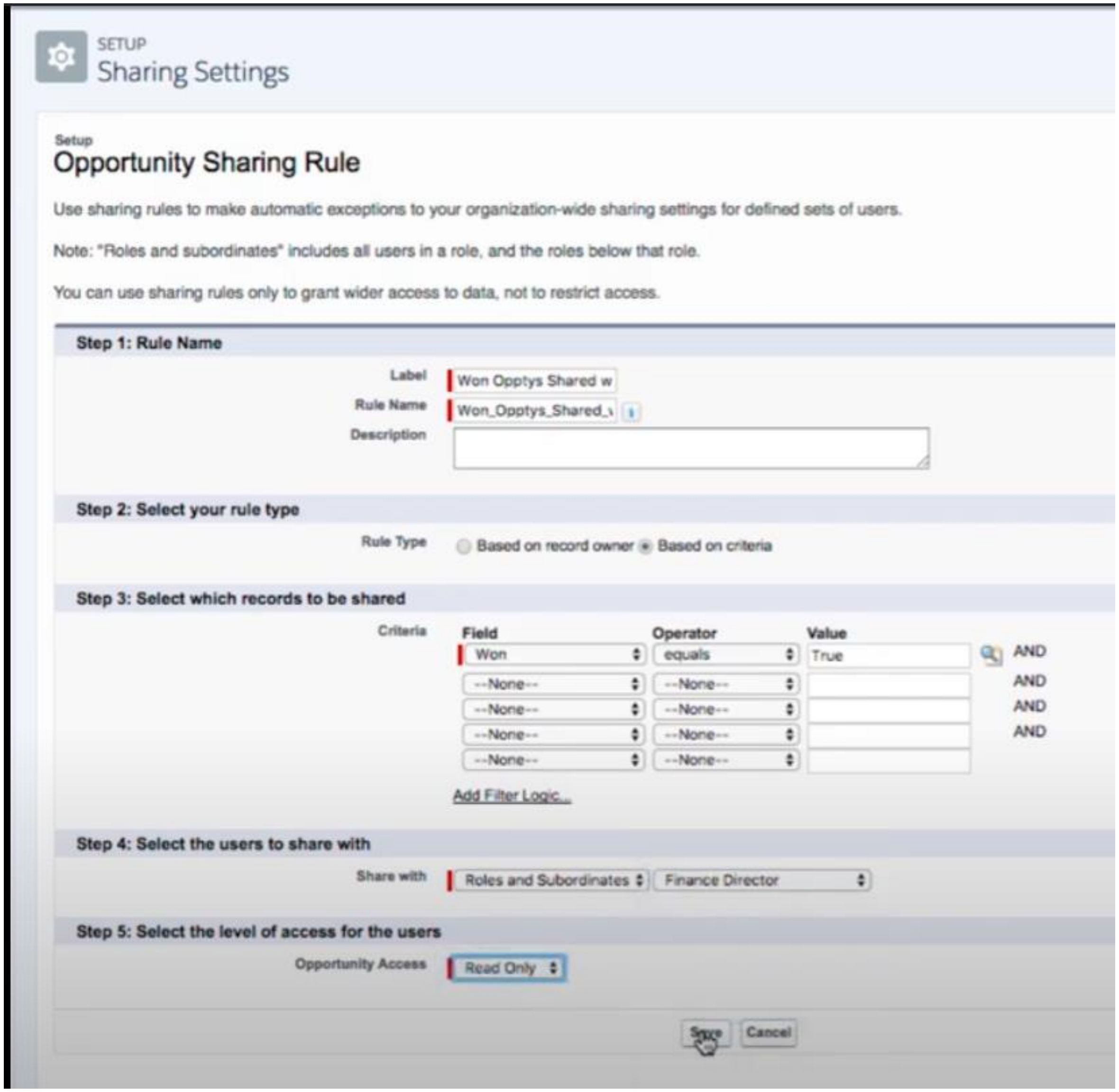
Based on Record Ownership

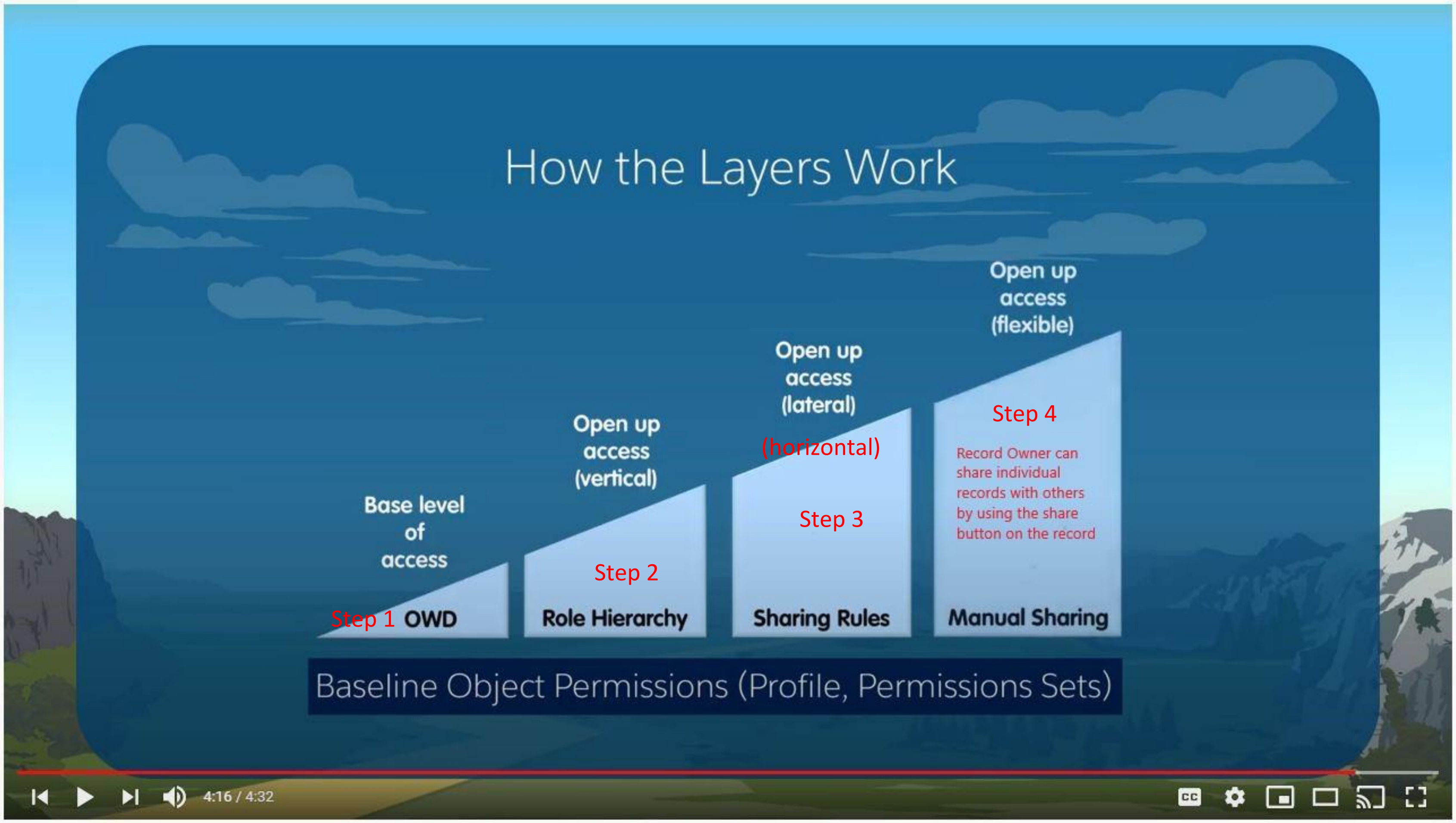
Reversed: Sharing Roles and Subordinates of APAC Sales Manager with Roles of US Sales Manager, Opportunity Access Read Only



Based on Record Ownership

Based on Record Criteria – Giving Finance Director Read Only access to all Opportunities Won.

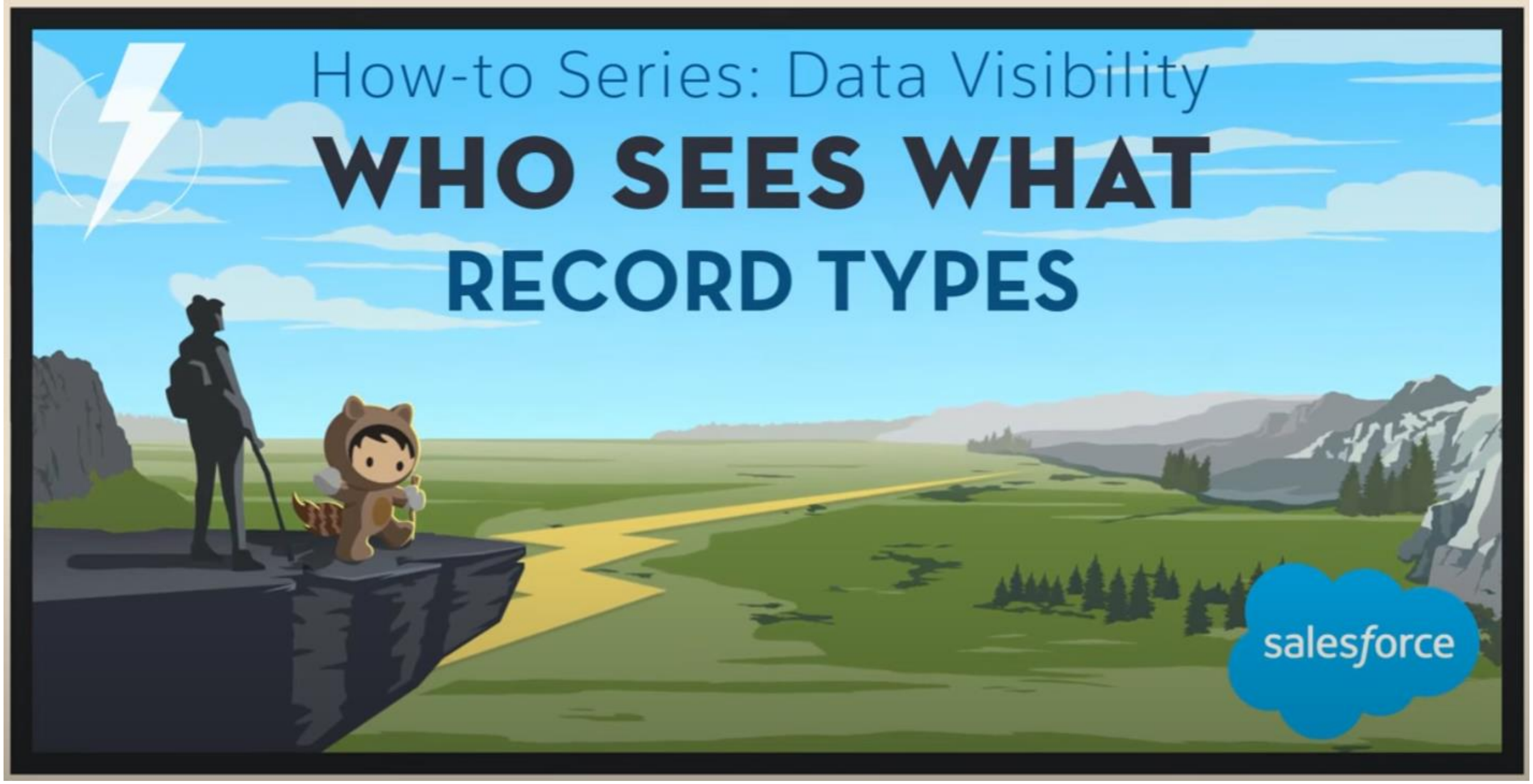




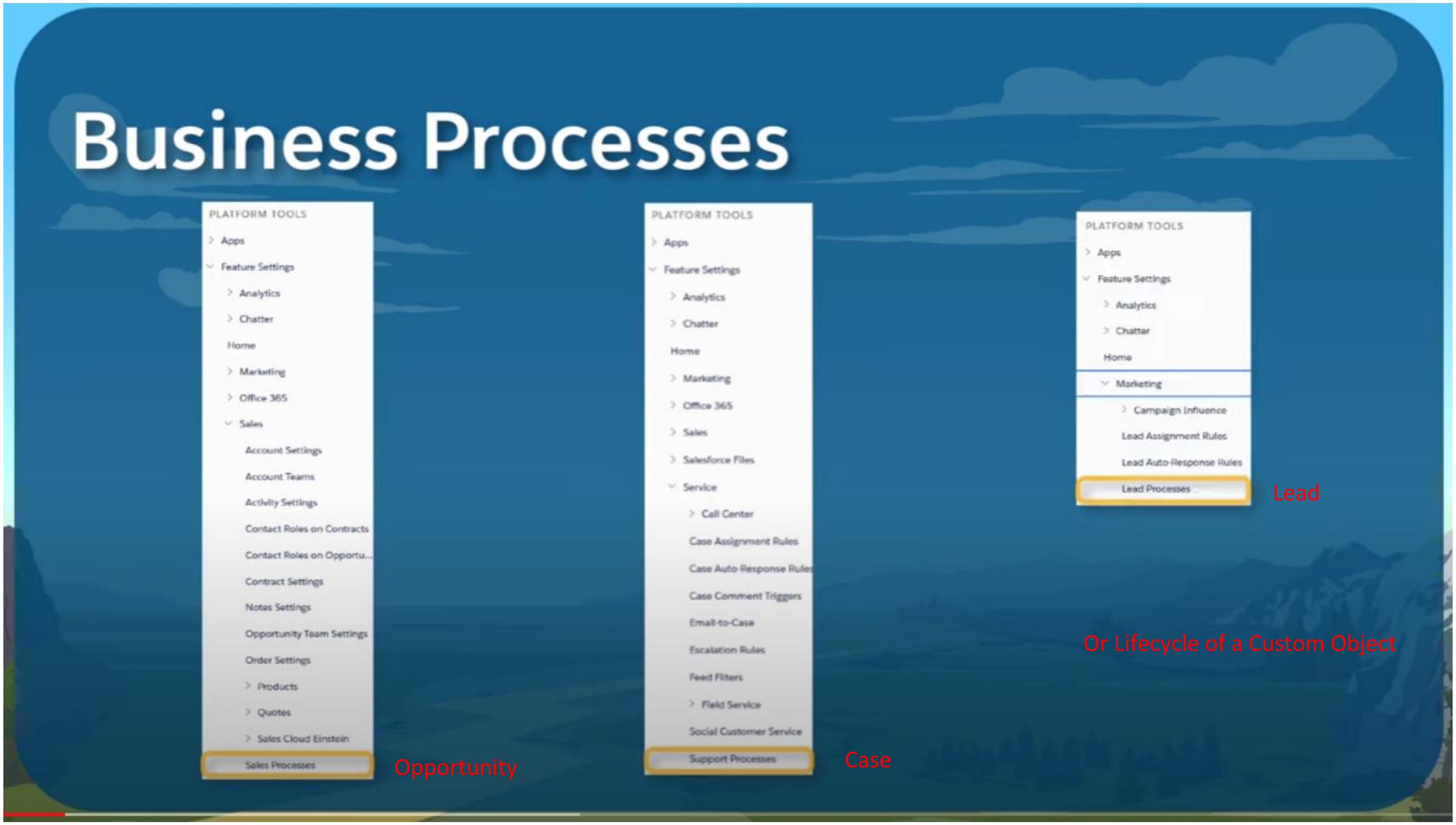
Example: Even though OWD for Opportunities is Private we have given access to the teams that DO NEED visibility by creating Sharing Rules.

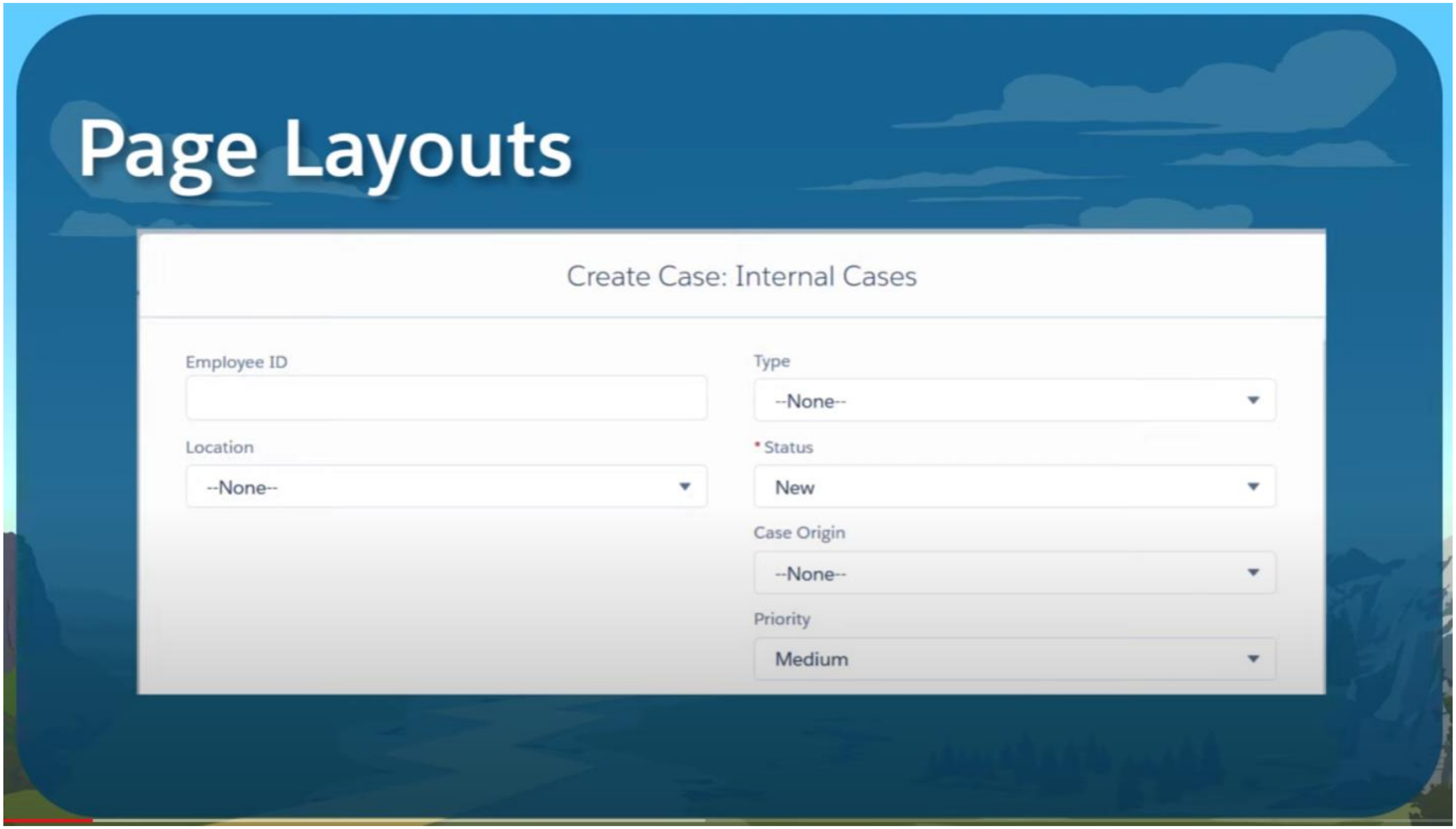
1. Access to Records a USER does NOT own are set by OWD.
2. If defaults are anything less than Public Read/Write, you can open access back up to certain Roles by using the Role Hierarchy.
3. Further open access by using Sharing Rules.
4. Record Owner can share individual records with others by using the Share Button on the record.

07 Record Types

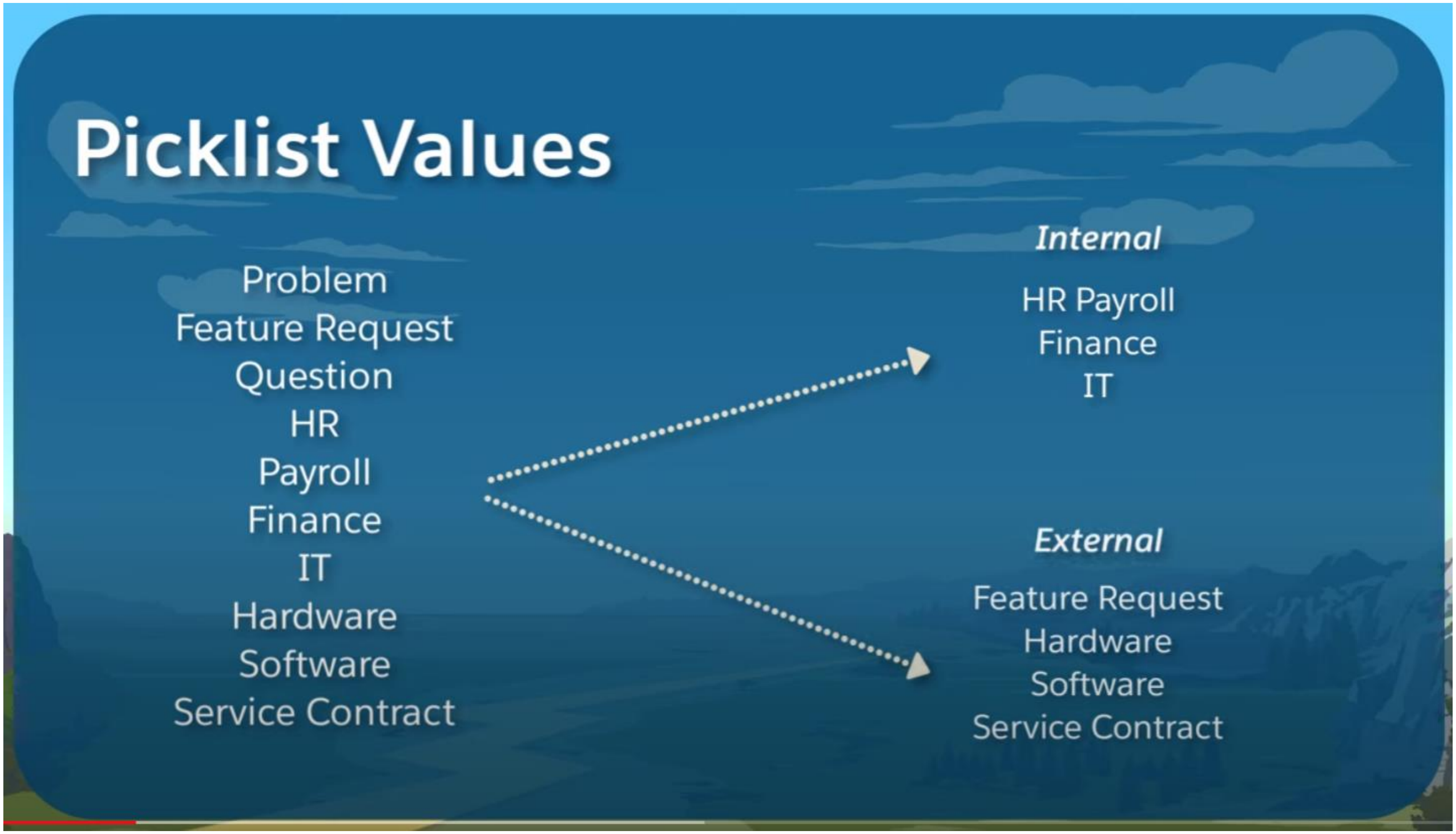



Record Types Control:
- Business Processes
- Page Layouts
- Picklist Values


Business Processes
PLATFORM TOOLS
Apps
Feature Settings
Analytics
Chatter
Home
Marketing
Office 365
Sales
Account Settings
Account Teams
Activity Settings
Contact Roles on Contracts
Contact Roles on Opportu...
Contract Settings
Notes Settings
Opportunity Team Settings
Order Settings
Products
Quotes
Sales Cloud Einstein
Sales Processes
Opportunity
PLATFORM TOOLS
Apps
Feature Settings
Analytics
Chatter
Home
Marketing
Office 365
Sales
Salesforce Files
Service
Call Center
Case Assignment Rules
Case Auto-Response Rules
Case Comment Triggers
Email-to-Case
Escalation Rules
Feed Filters
Field Service
Social Customer Service
Support Processes
Case
PLATFORM TOOLS
Apps
Feature Settings
Analytics
Chatter
Home
Marketing
Campaign Influence
Lead Assignment Rules
Lead Auto-Response Rules
Lead Processes
Lead
Or Lifecycle of a Custom Object



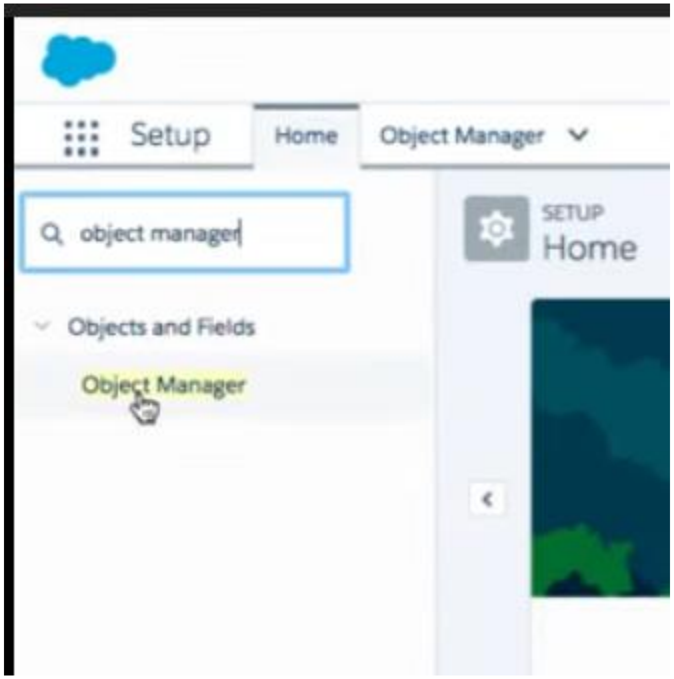
Select and organize groups of fields related to an Object.



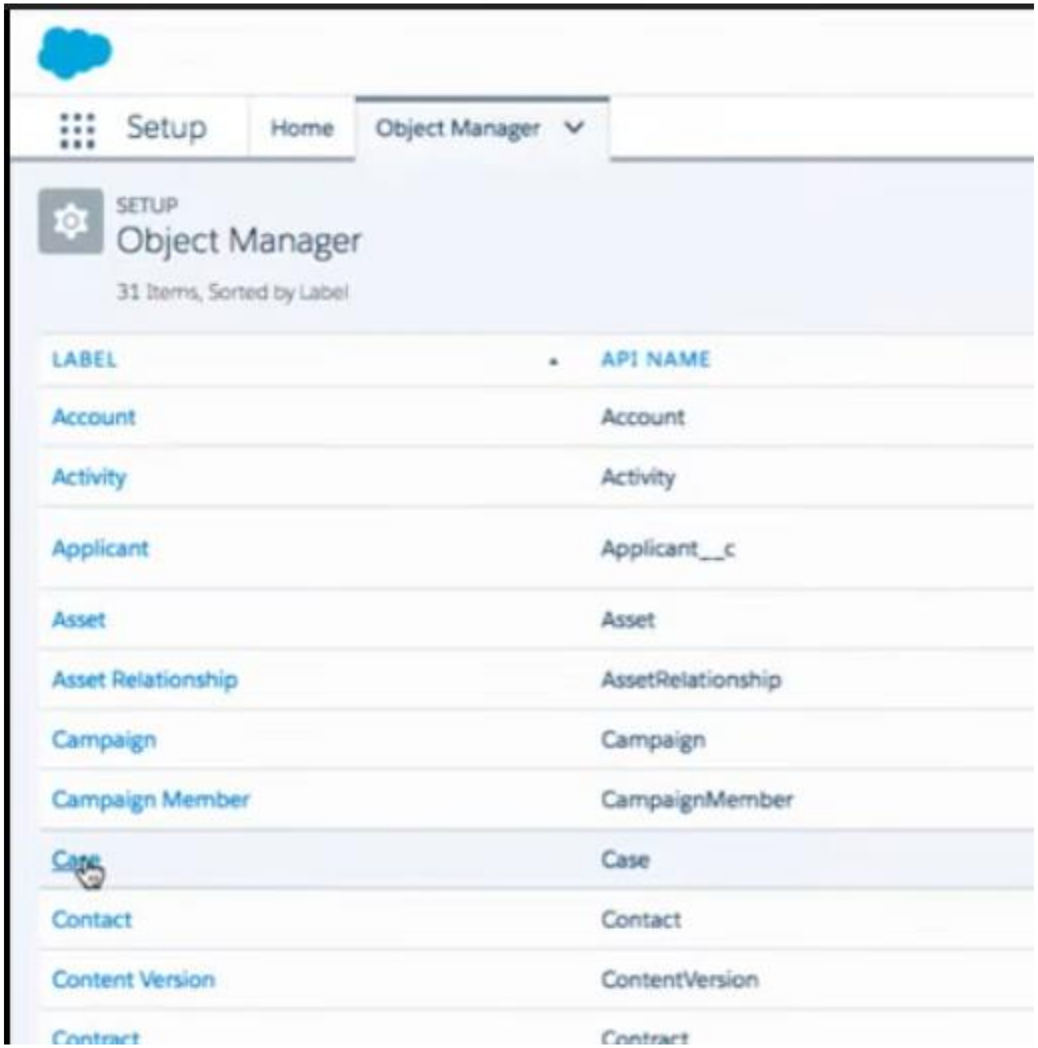
1. Define Master List with all possible choices.
2. Use Record Types to display a subset depending upon the situation.

Problem: Creating Internal and External business process for Case Object

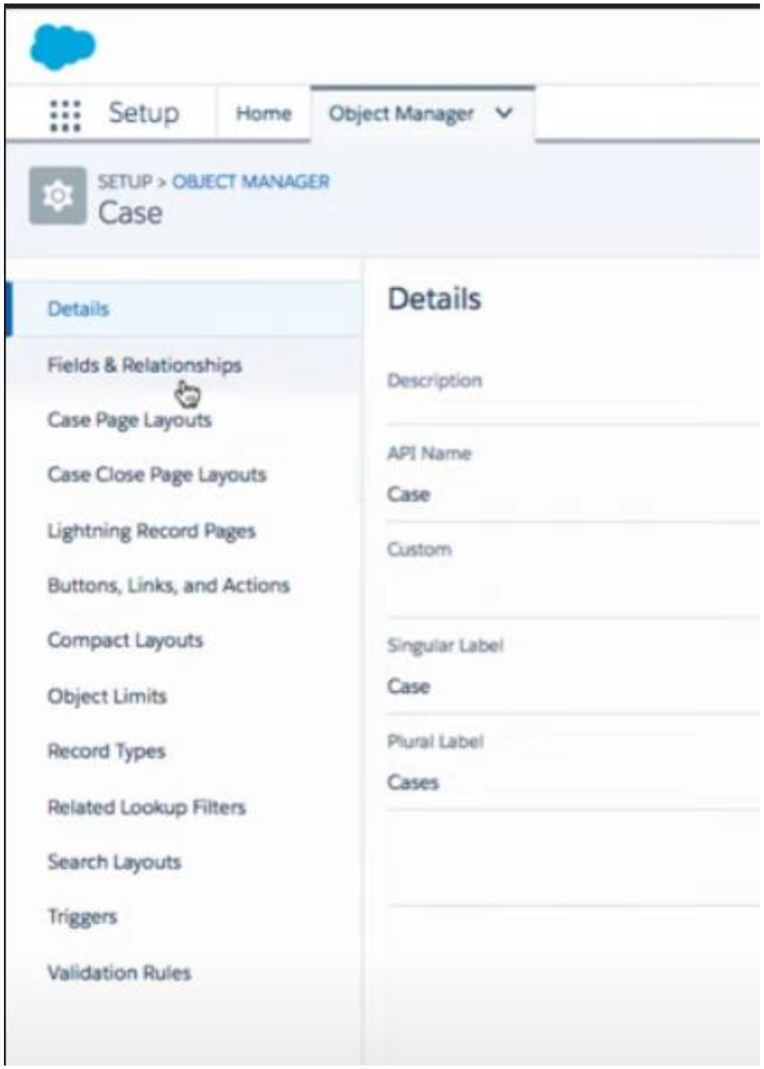
Start with Object Manager:



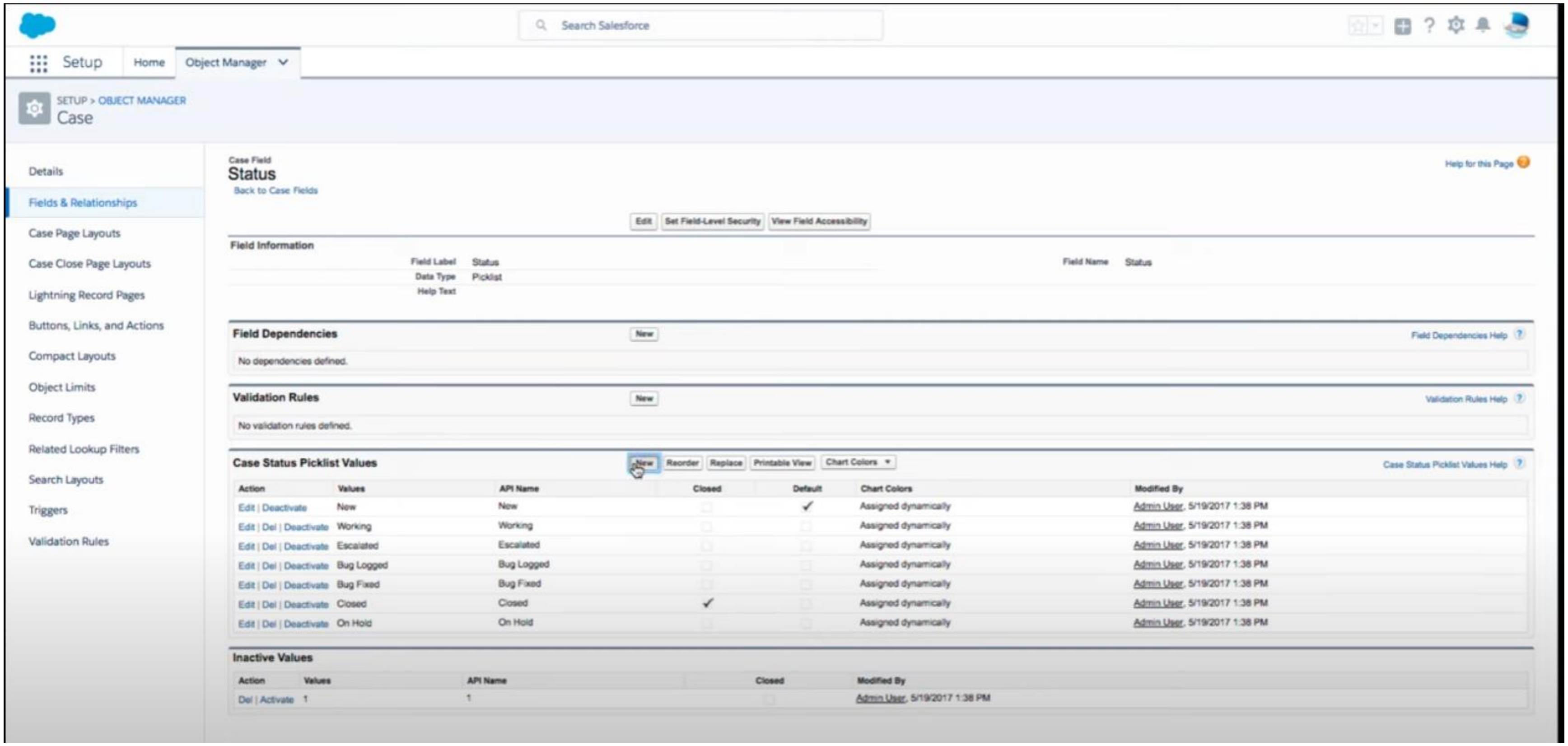
Click on Case Object:



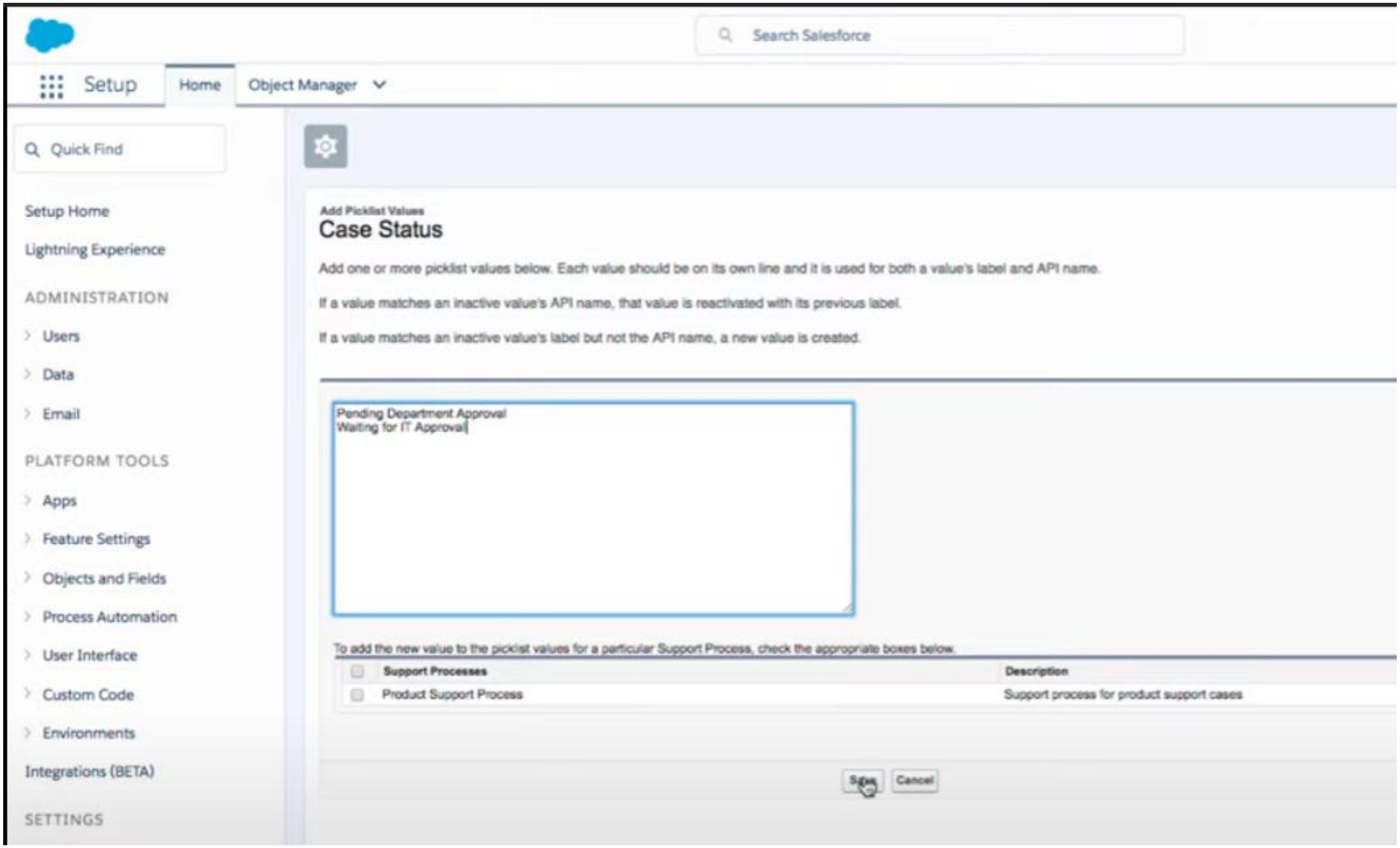
Click on Fields & Relationships:



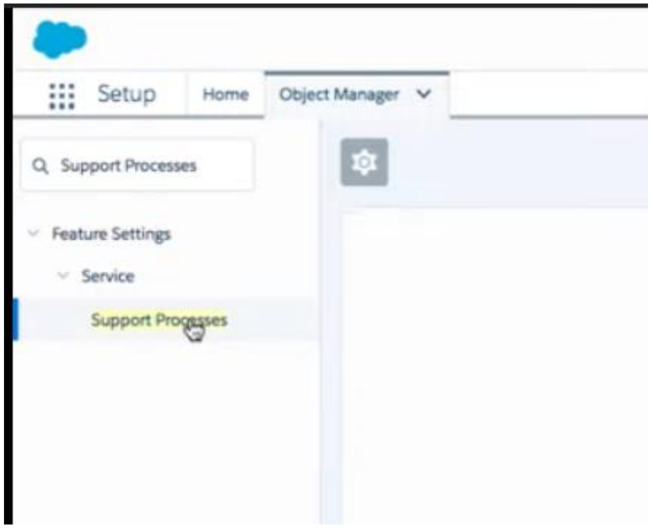
Add values you need to Status Field – This is your master list of values. Status is used by Case Support Processes:



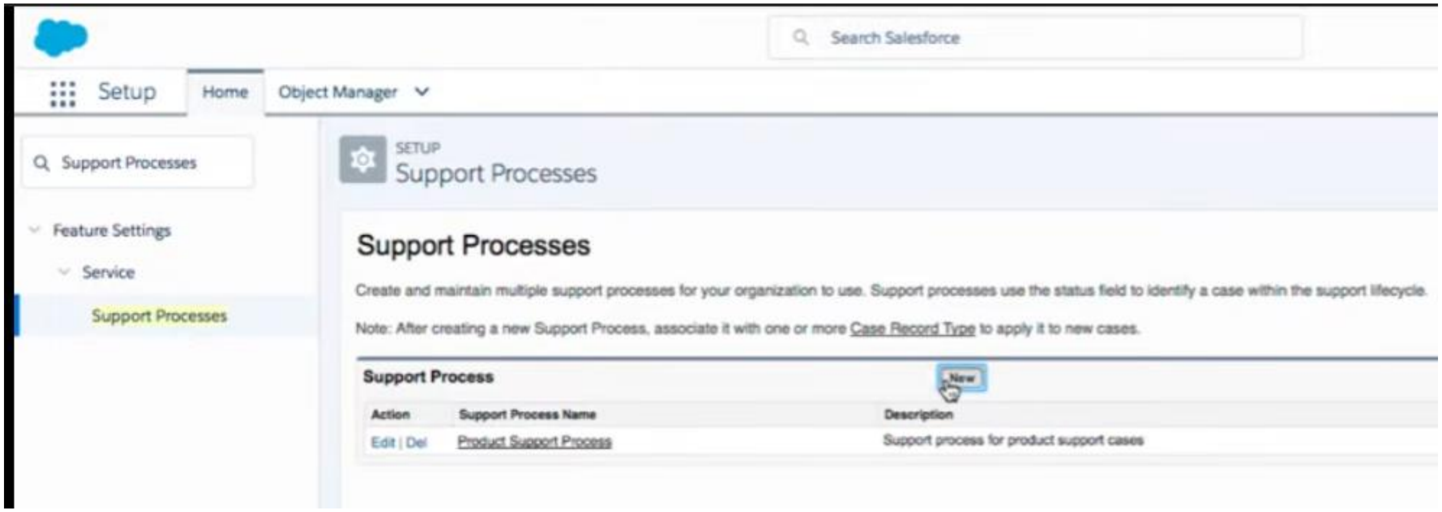
Click on New to add new values. Since this is the master list, you add the values for both Internal and External processes.


Search Salesforce
Setup
Home
Object Manager
Quick Find
Setup Home
Lightning Experience
ADMINISTRATION
Users
Data
Email
PLATFORM TOOLS
Apps
Feature Settings
Objects and Fields
Process Automation
User Interface
Custom Code
Environments
Integrations (BETA)
SETTINGS
Add Picklist Values
Case Status
Add one or more picklist values below. Each value should be on its own line and it is used for both a value's label and API name.
If a value matches an inactive value's API name, that value is reactivated with its previous label.
If a value matches an inactive value's label but not the API name, a new value is created.
Pending Department Approval
Waiting for IT Approval
To add the new value to the picklist values for a particular Support Process, check the appropriate boxes below.
Support Processes
Description
Product Support Process
Support process for product support cases
Cancel

Go To: Support Processes to define the processes that are unique to each type of case.

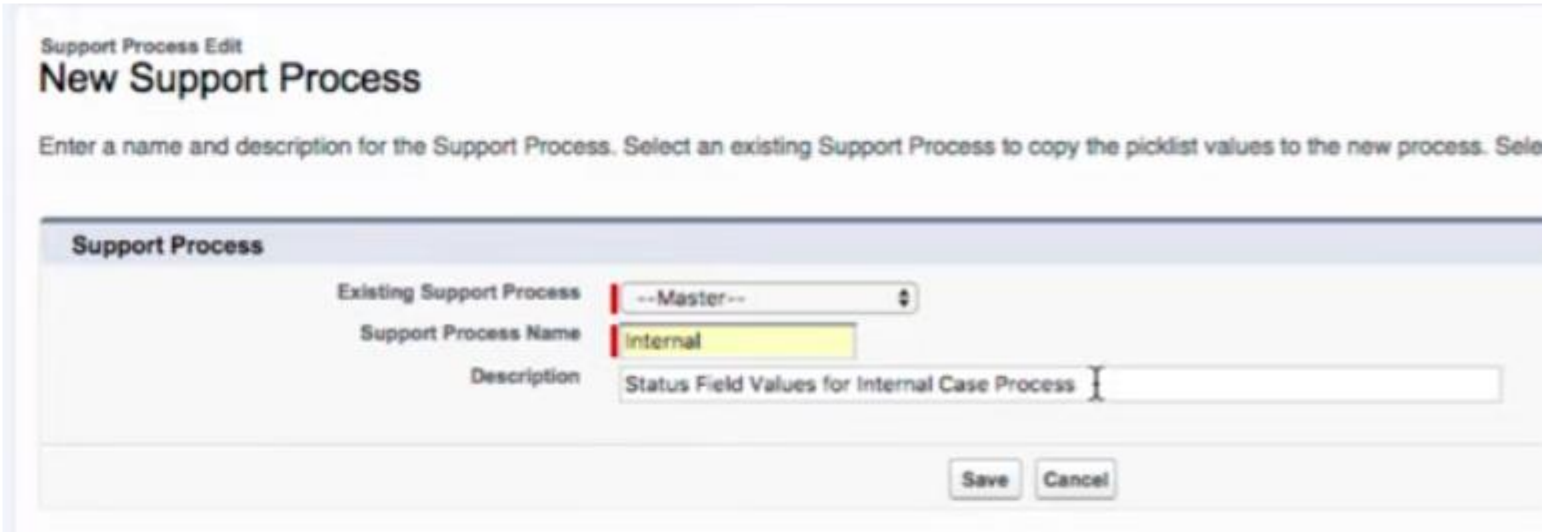


Click New:

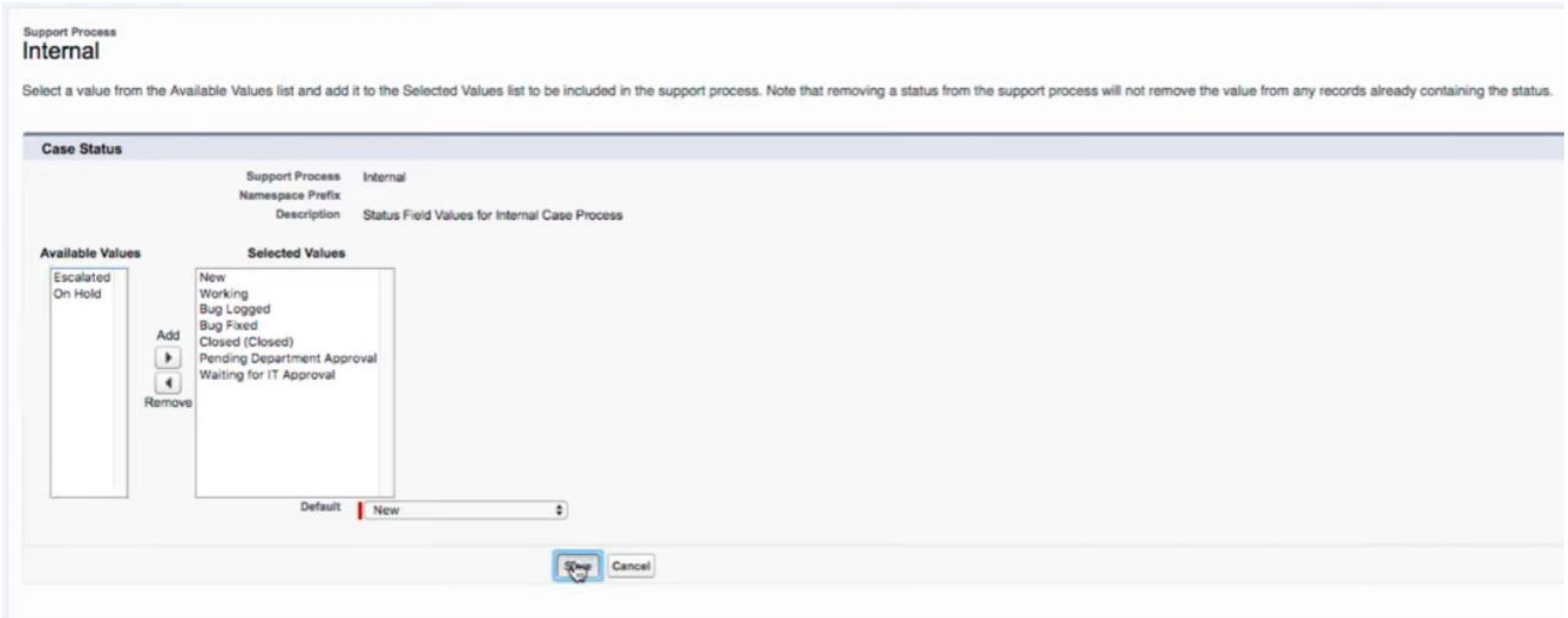


Creating a New Support Process is a two-step process. First, you create the Support Process. Then you specify the values that will be used in the New Support Process.

Step 1:

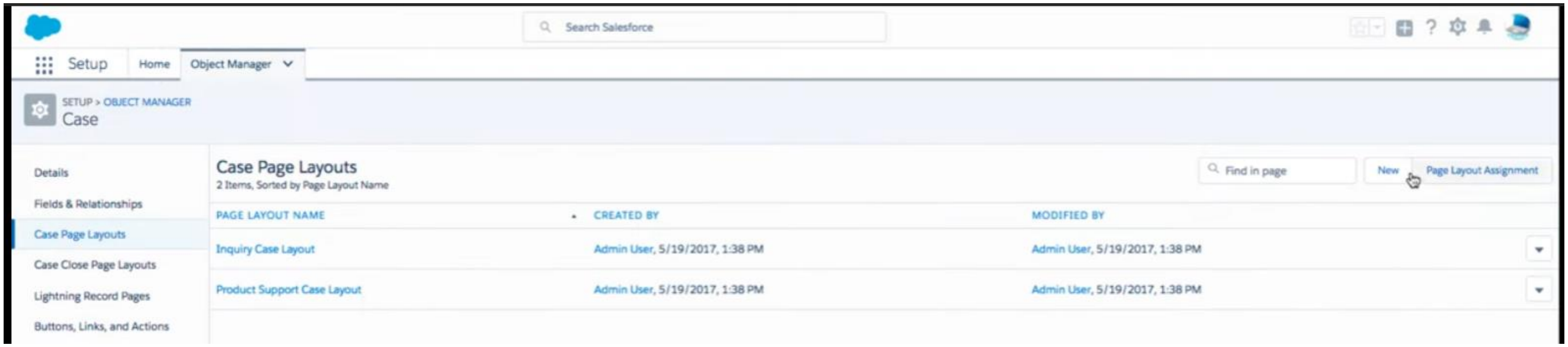


Step 2:



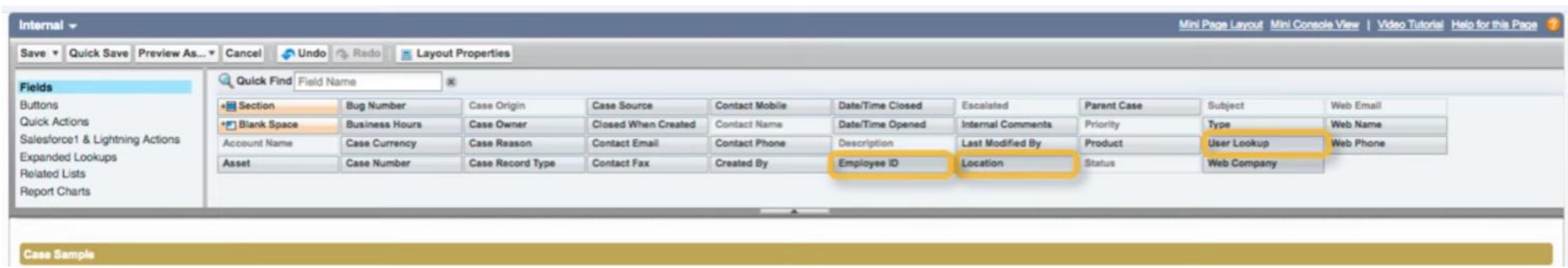
This will be done twice – one for the Internal process and the other for External process.

Next is page layouts to be modified for each process:

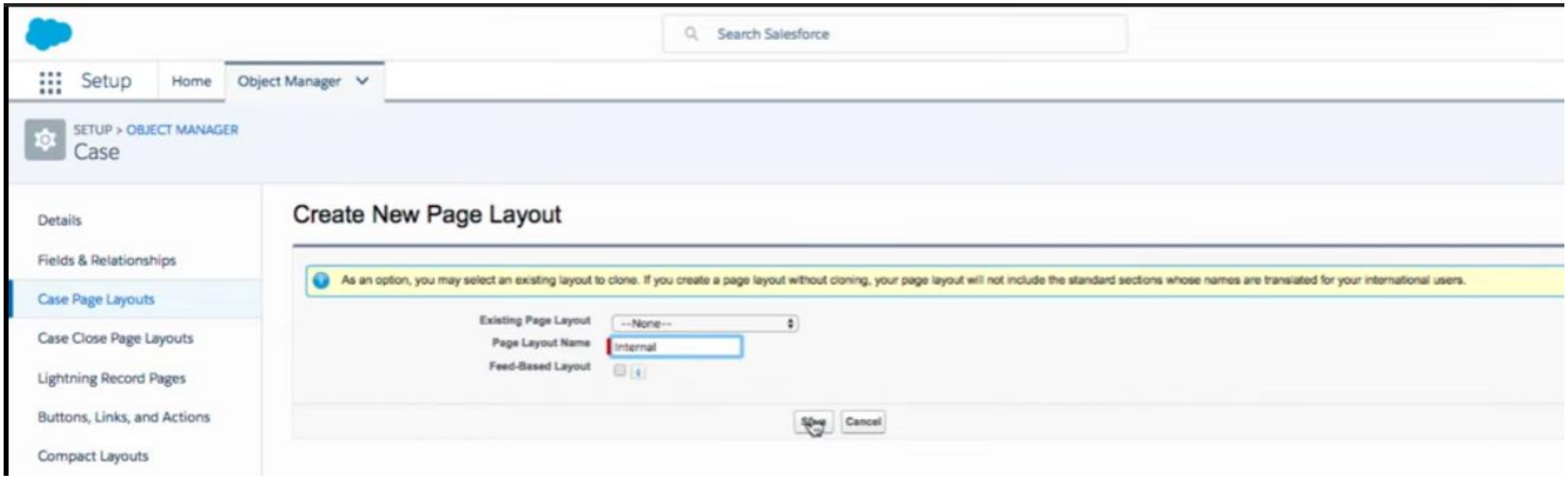


You must create any custom fields that you will need before modifying the page layout.

Example of custom fields already created and displayed in page layout Fields list.



Create New Page Layout – Internal First

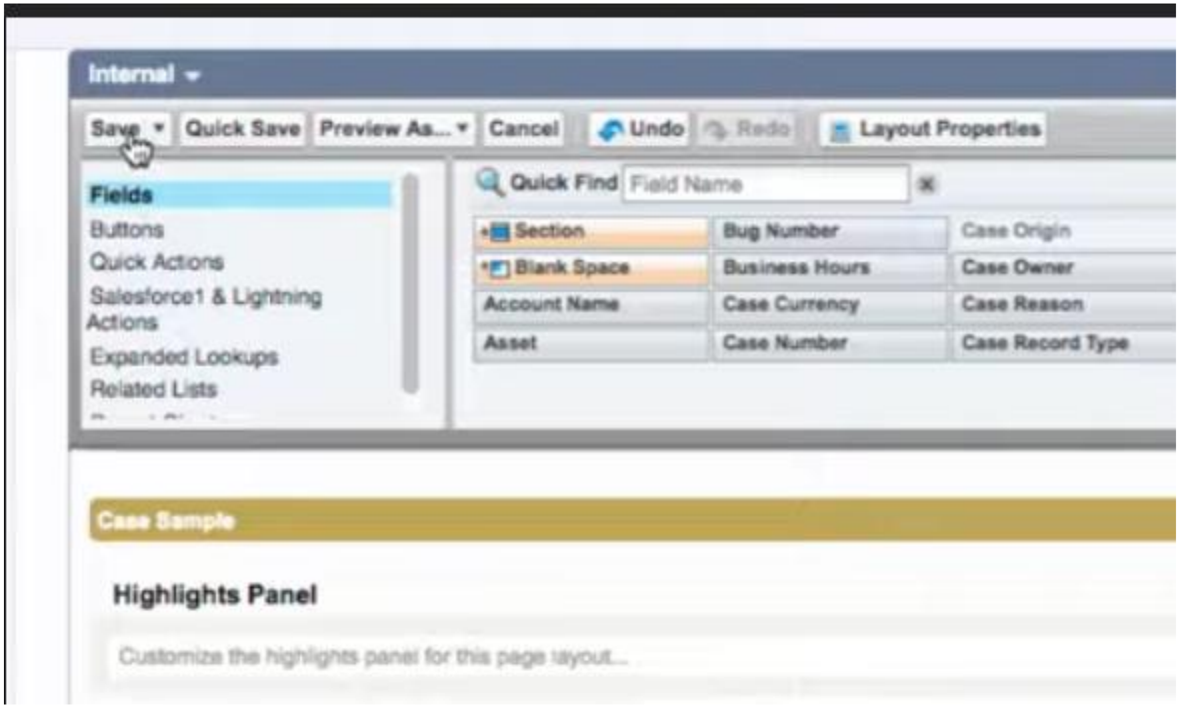


Editing page layout:

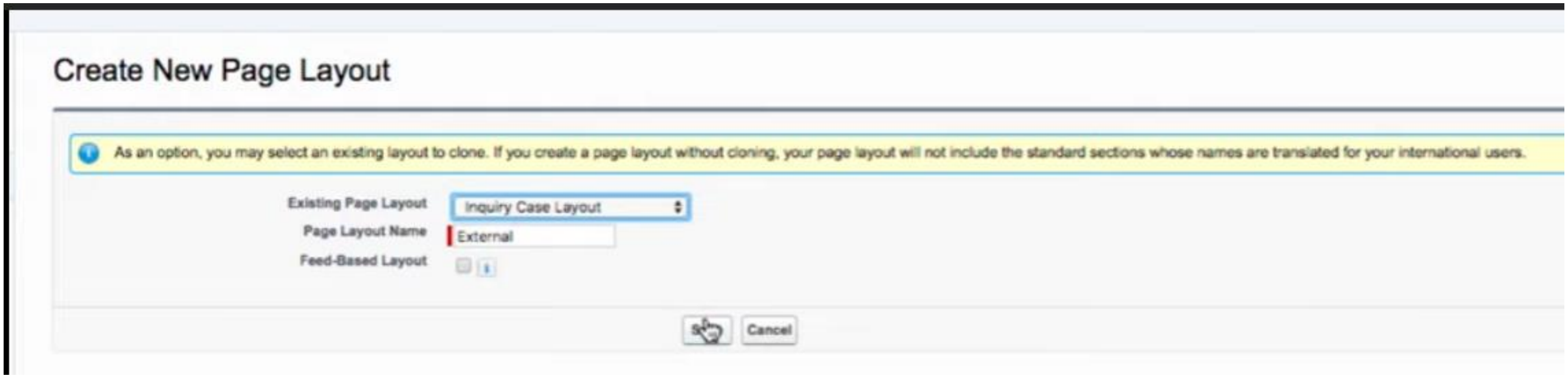
1. Add Fields you need
2. Remove fields you do not need
3. For Fields you cannot remove – Add a new section, and place special field in this section. This is so that the field in question is out of the way.

Note: At this point, Record Type does not exist – Once Record Type the system will create a field Case Record Type. Then we can add the record type to the page layout. This isn't necessary, but it will help the user to know what record type they are working on, especially if they work with more than one record type.

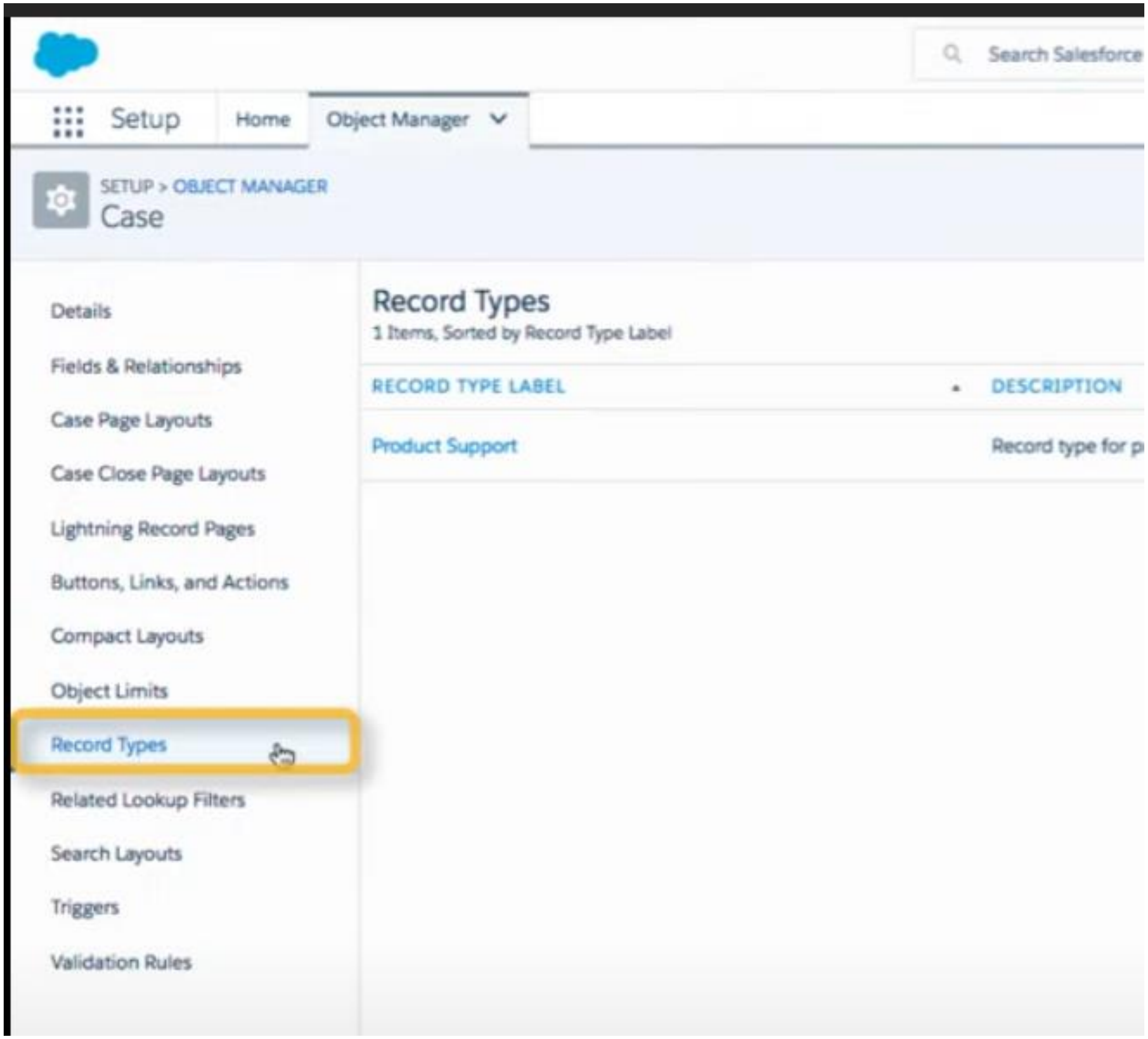
Save the Internal Page Layout:



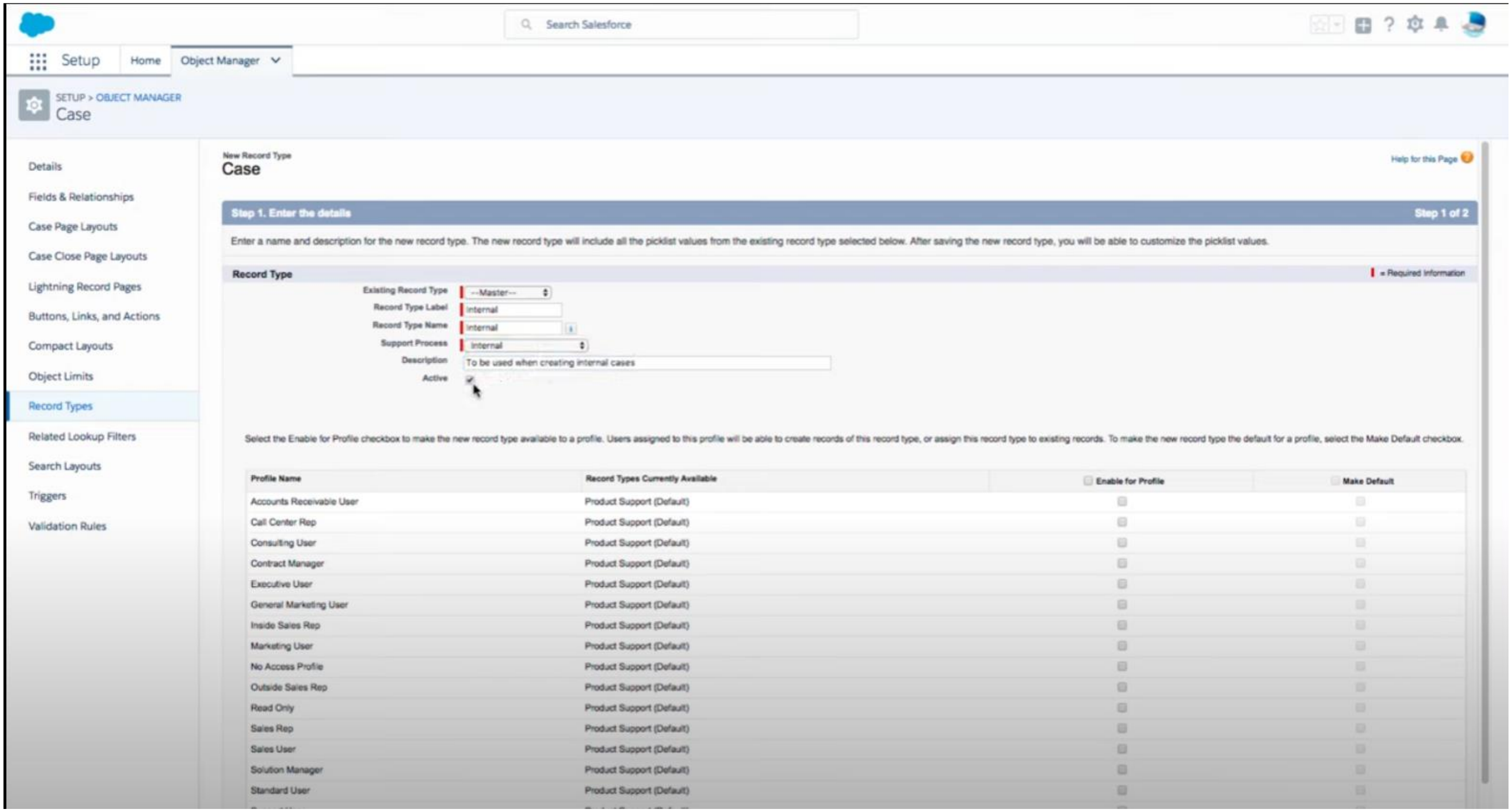
You will repeat the steps for creating the External Process Case Page layout:



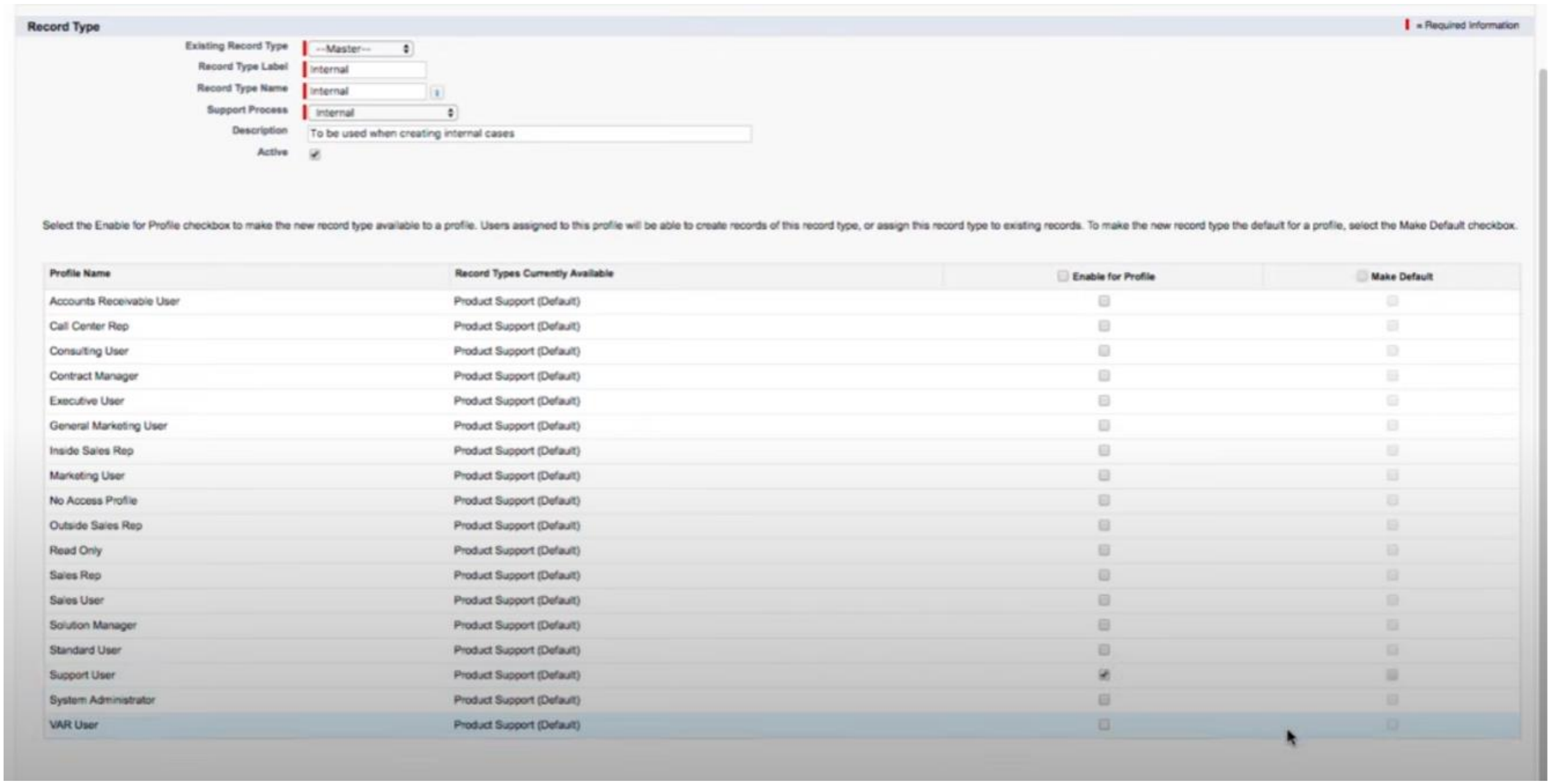
Now, we will create two new Record Types. Click New.



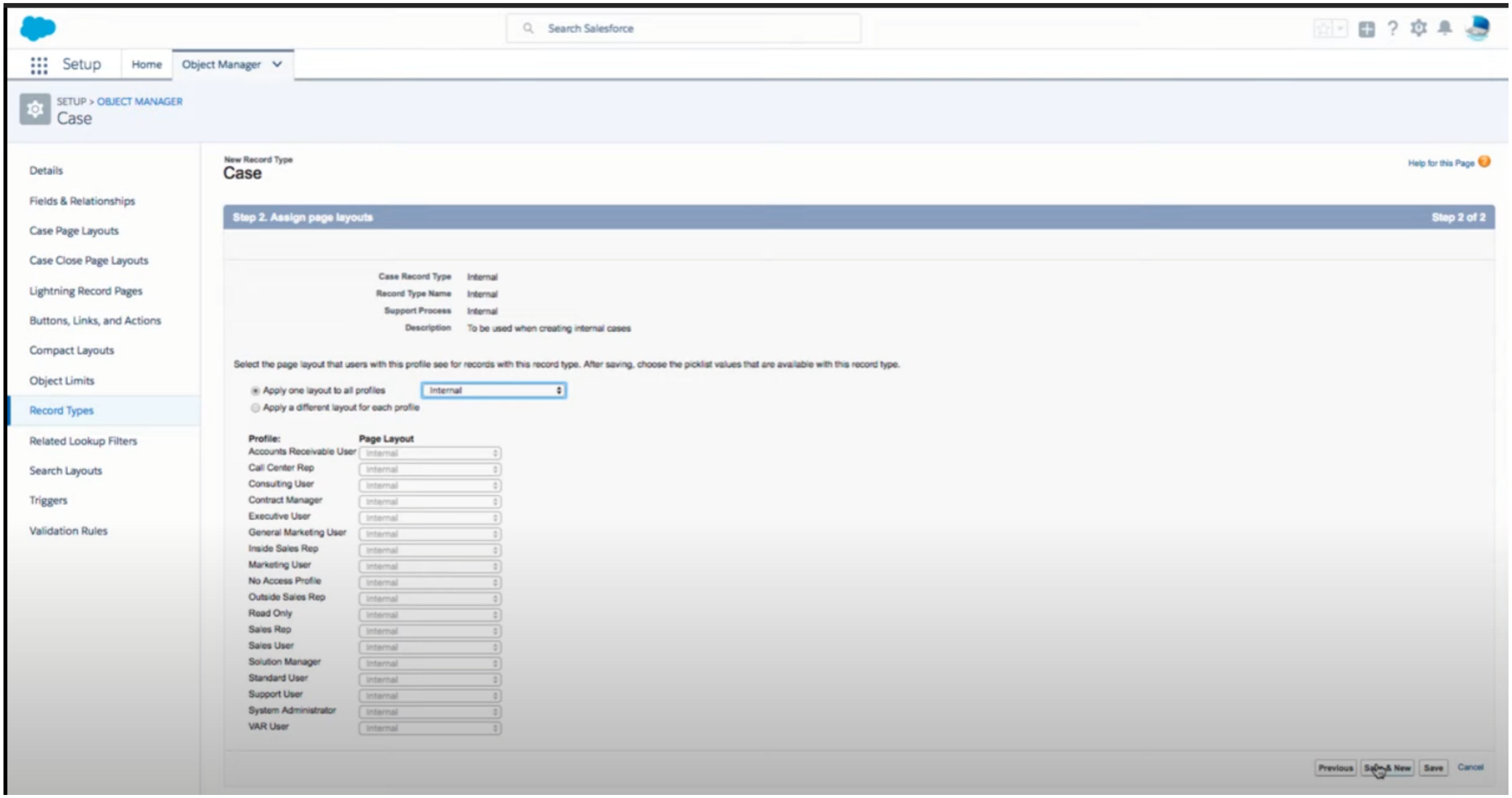
Here you create a new Record Type, you will reference the Support Process you created in the previous step. This is a two step configuration.



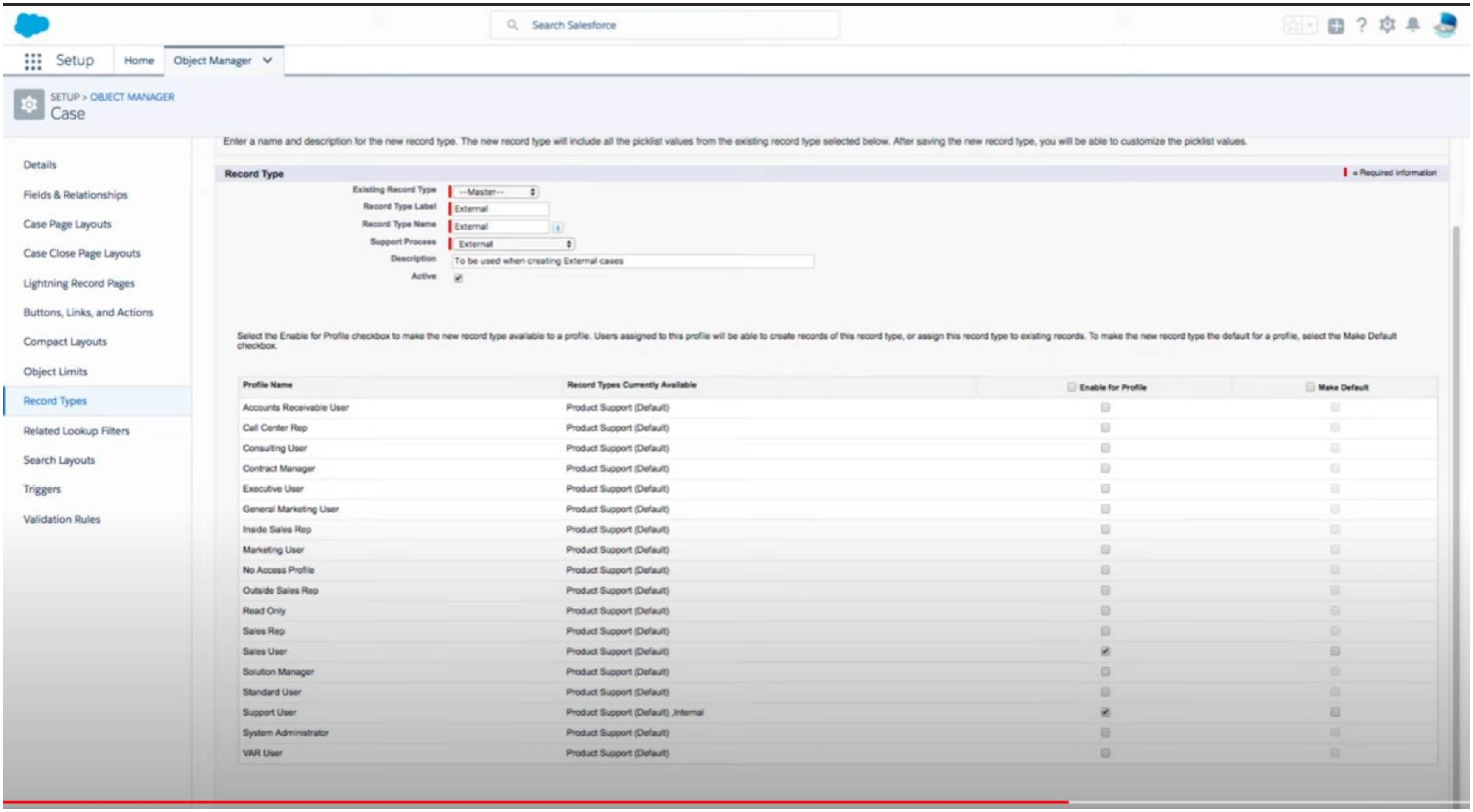
You click on the profile that will require this Record Type. In this case, Support User.



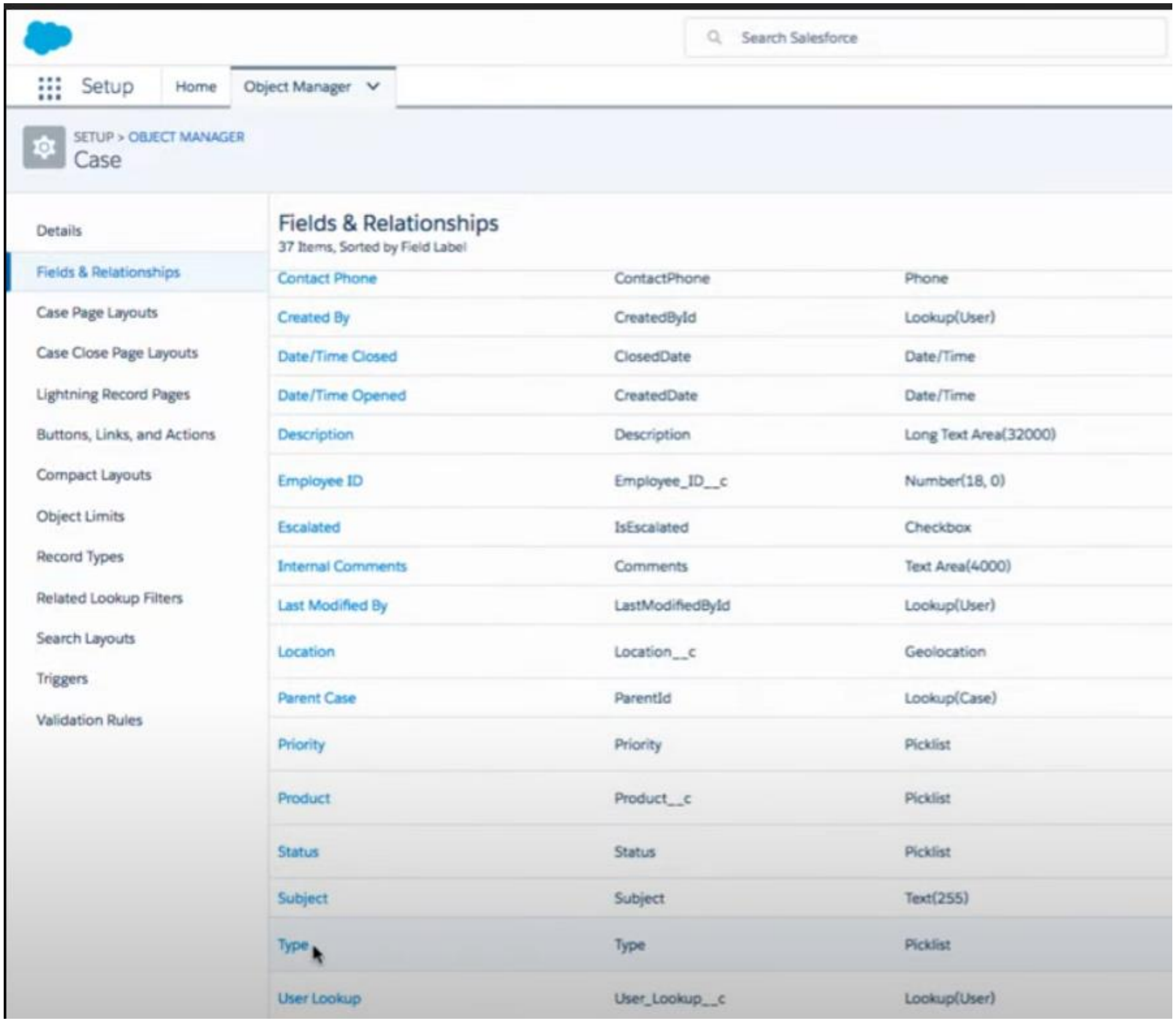
Apply the layout to all profiles:



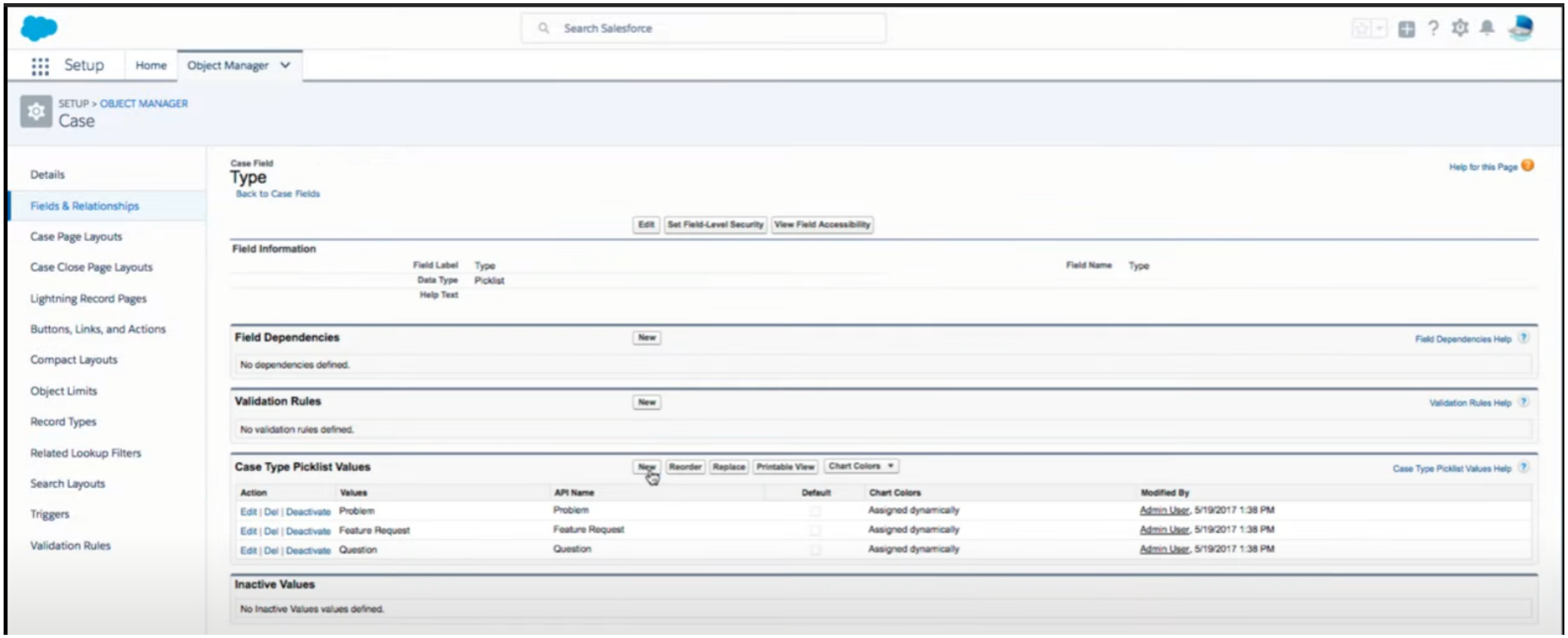
You will repeat the steps for the External record type. The External Support Process will be used by both Sales User and Support User, so both profiles are checked.



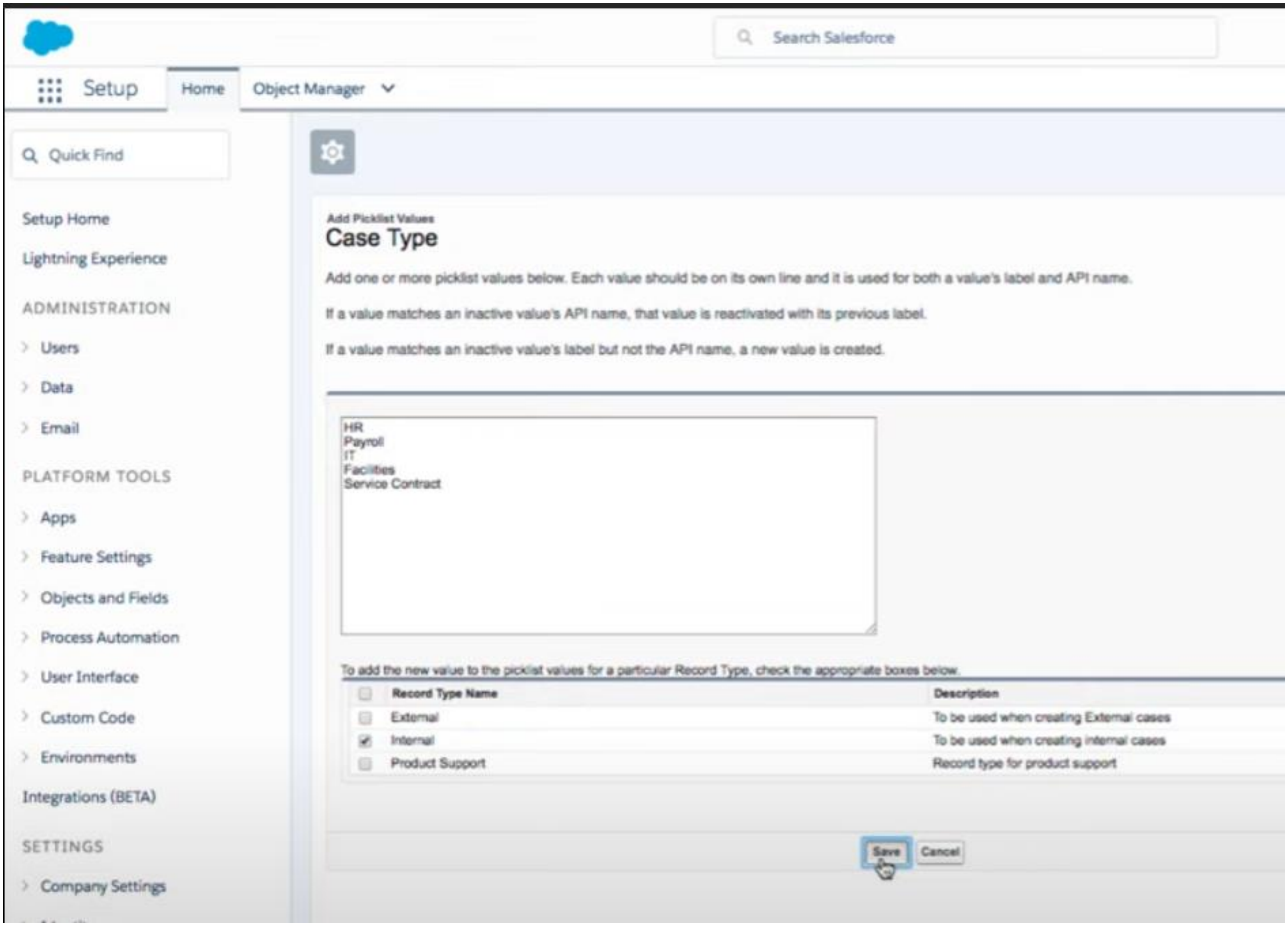
This is separate from the Status Picklist; we are now modifying the Type picklist on the Case object.



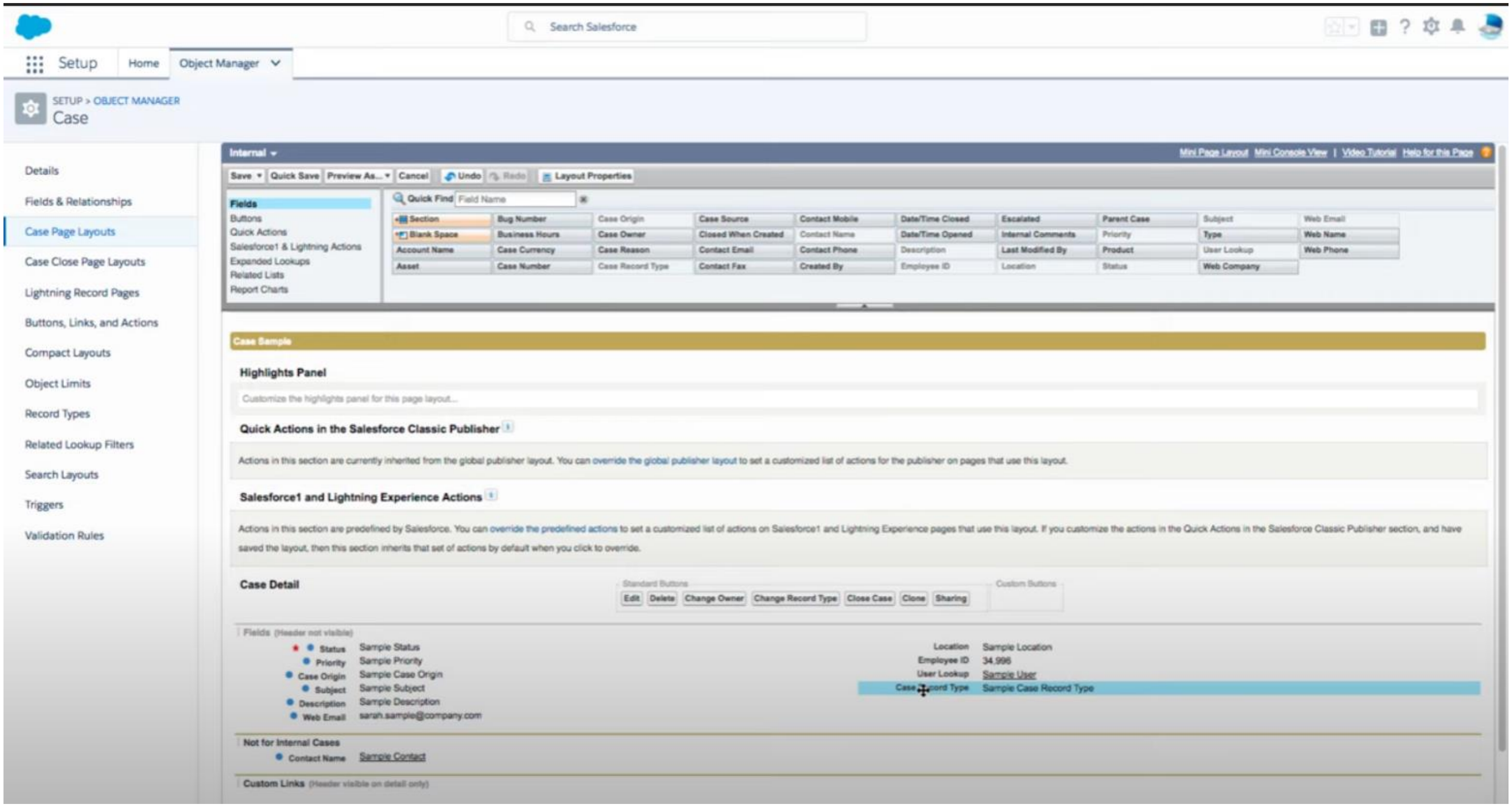
Add values:


Search Salesforce
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Case
Details
Fields & Relationships
Case Page Layouts
Case Close Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Object Limits
Record Types
Related Lookup Filters
Search Layouts
Triggers
Validation Rules
Case Field
Type
Back to Case Fields
Help for this Page
Edit
Set Field-Level Security
View Field Accessibility
Field Information
Field Label Type
Data Type Picklist
Help Text
Field Name Type
Field Dependencies
New
Field Dependencies Help
No dependencies defined.
Validation Rules
New
Validation Rules Help
No validation rules defined.
Case Type Picklist Values
New
Reorder
Replace
Printable View
Chart Colors
Case Type Picklist Values Help
Action
Values
API Name
Default
Chart Colors
Modified By
Edit | Del | Deactivate Problem Problem Assigned dynamically Admin User, 5/19/2017 1:38 PM
Edit | Del | Deactivate Feature Request Feature Request Assigned dynamically Admin User, 5/19/2017 1:38 PM
Edit | Del | Deactivate Question Question Assigned dynamically Admin User, 5/19/2017 1:38 PM
Inactive Values
No Inactive Values values defined.

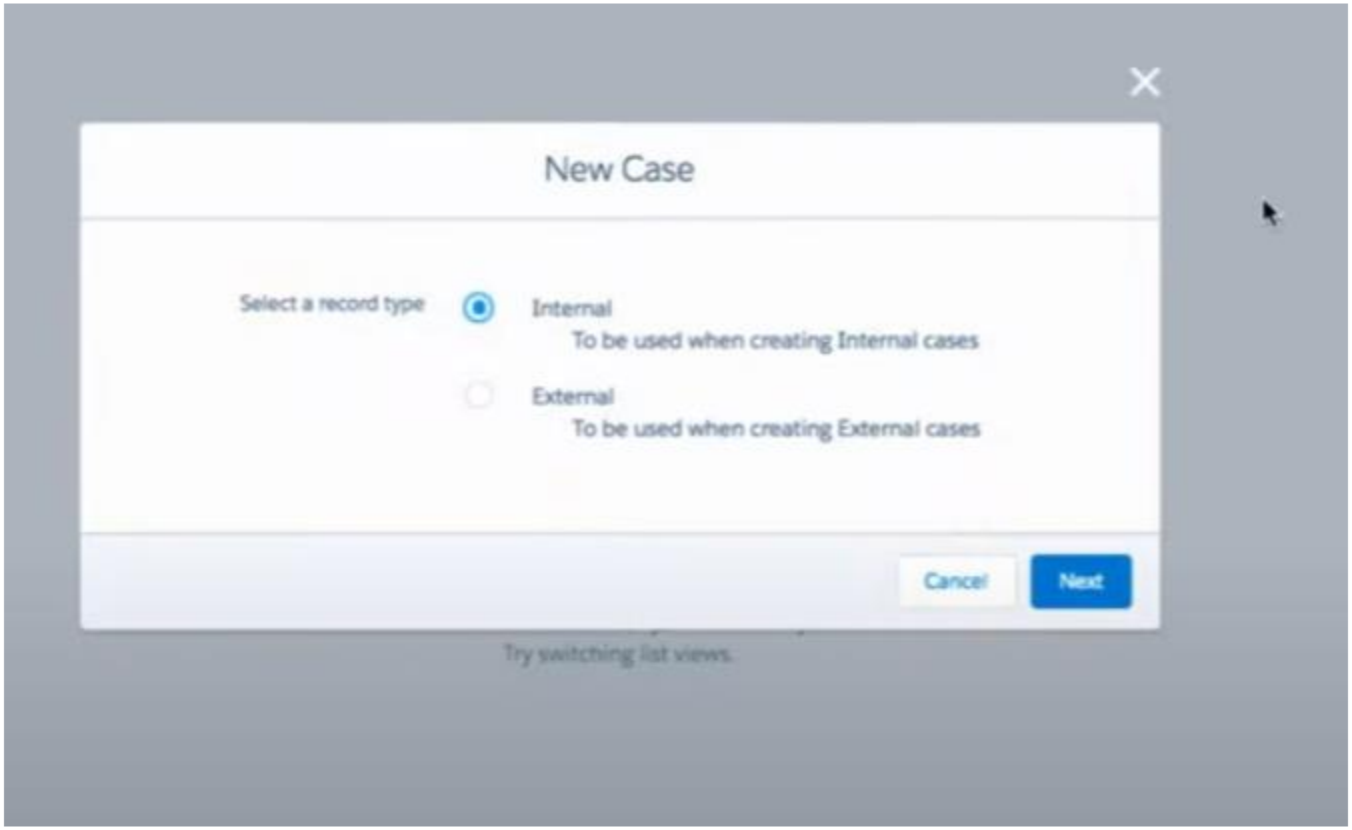
Assign values to the appropriate Record Type, this will be done for both Internal and External Record Types:



Go back to Page Layout and add the field Case Record Type to both the Internal and External Page Layout:



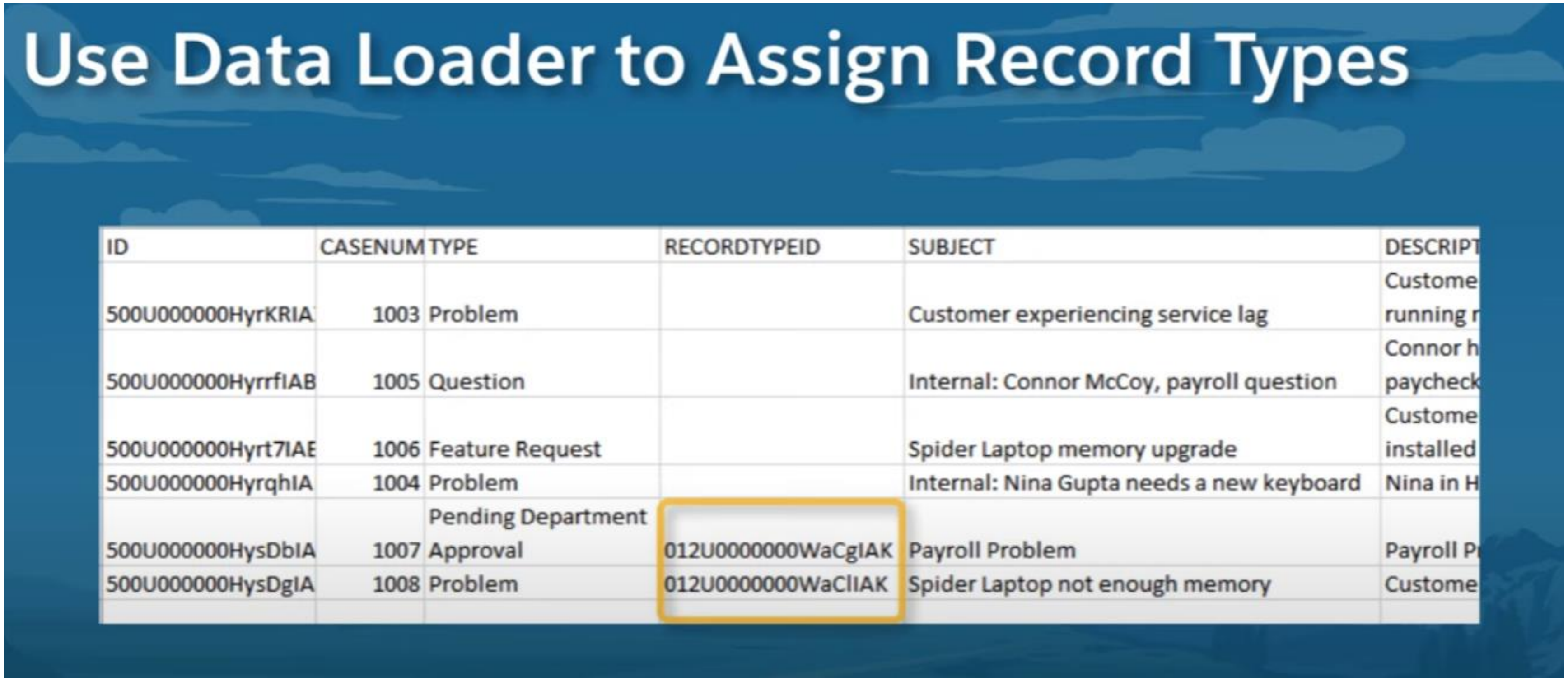
Log in as a Support User – this is what you should see when you create a new Case:



Picking a Record Type provides the fields, picklists values and business processes that is needed for that type of case.

Things to Watch Out For

- Edit record type assignments in Manage Users | Profiles
- Any records created before record types must have a record type assigned retroactively.

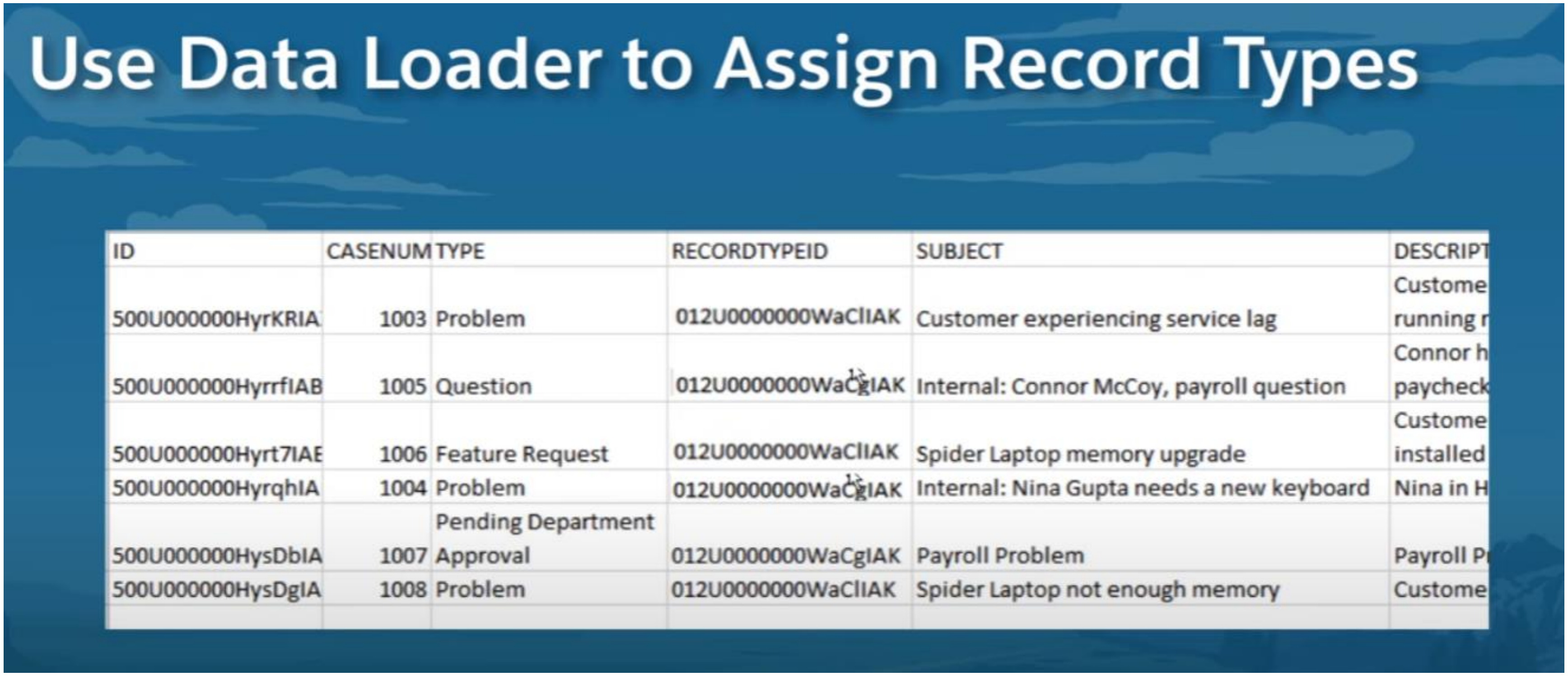


Use Data Loader to Assign Record Types

ID	CASENUM	TYPE	RECORDTYPEID	SUBJECT	DESCRIPT
500U000000HyrKRIA	1003	Problem		Customer experiencing service lag	Custome running r
500U000000HyrrfIAB	1005	Question		Internal: Connor McCoy, payroll question	Connor h paycheck
500U000000Hyrt7IAE	1006	Feature Request		Spider Laptop memory upgrade	Custome installed
500U000000HyrqhIA	1004	Problem		Internal: Nina Gupta needs a new keyboard	Nina in H
500U000000HysDbIA	1007	Pending Department Approval	012U0000000WaCgIAK	Payroll Problem	Payroll P
500U000000HysDgIA	1008	Problem	012U0000000WaClIAK	Spider Laptop not enough memory	Custome

Use data loader, but you must export and get record type ids for each record type so you can modify your data appropriately.

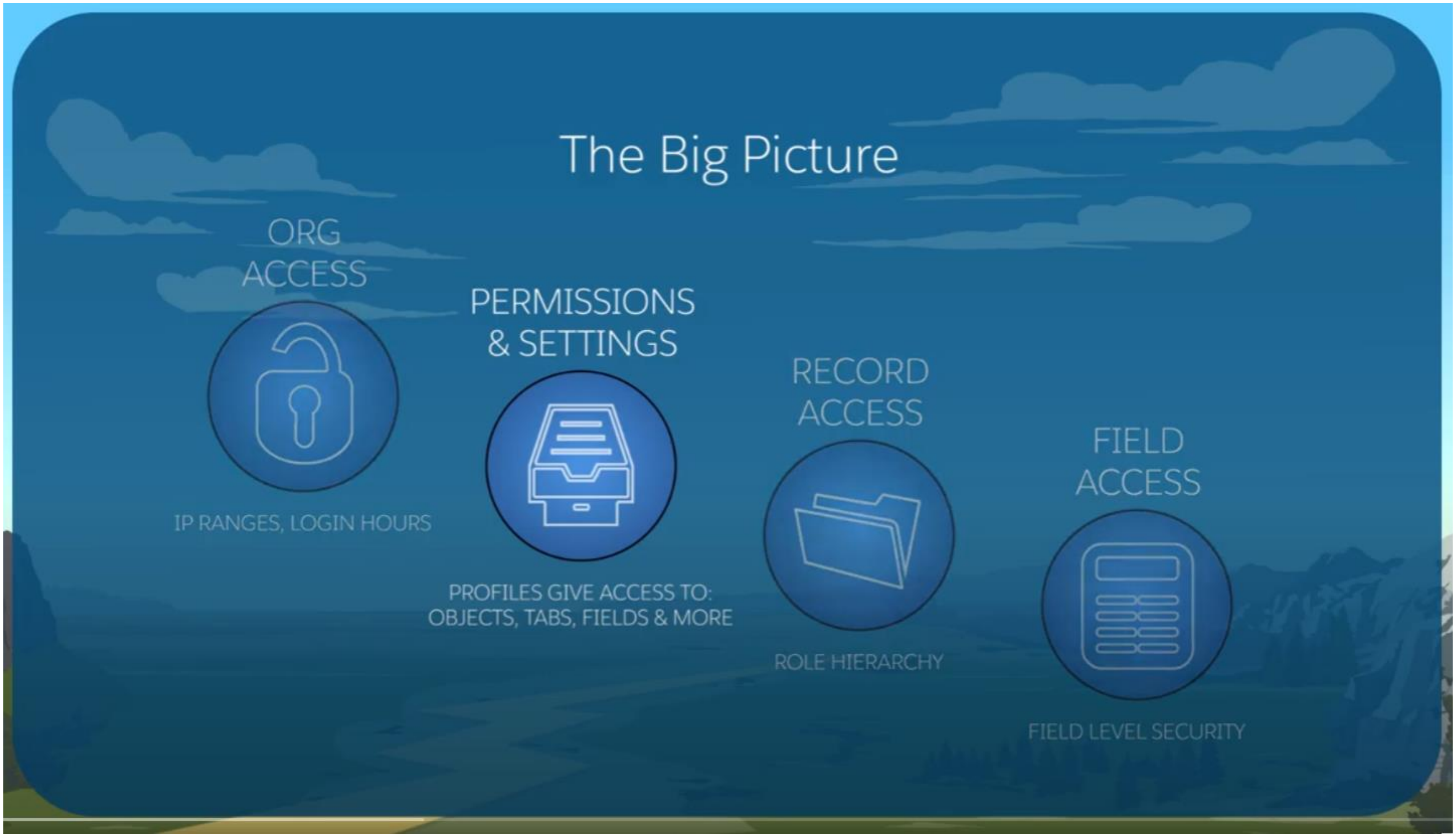
Apply correct ID to empty records:

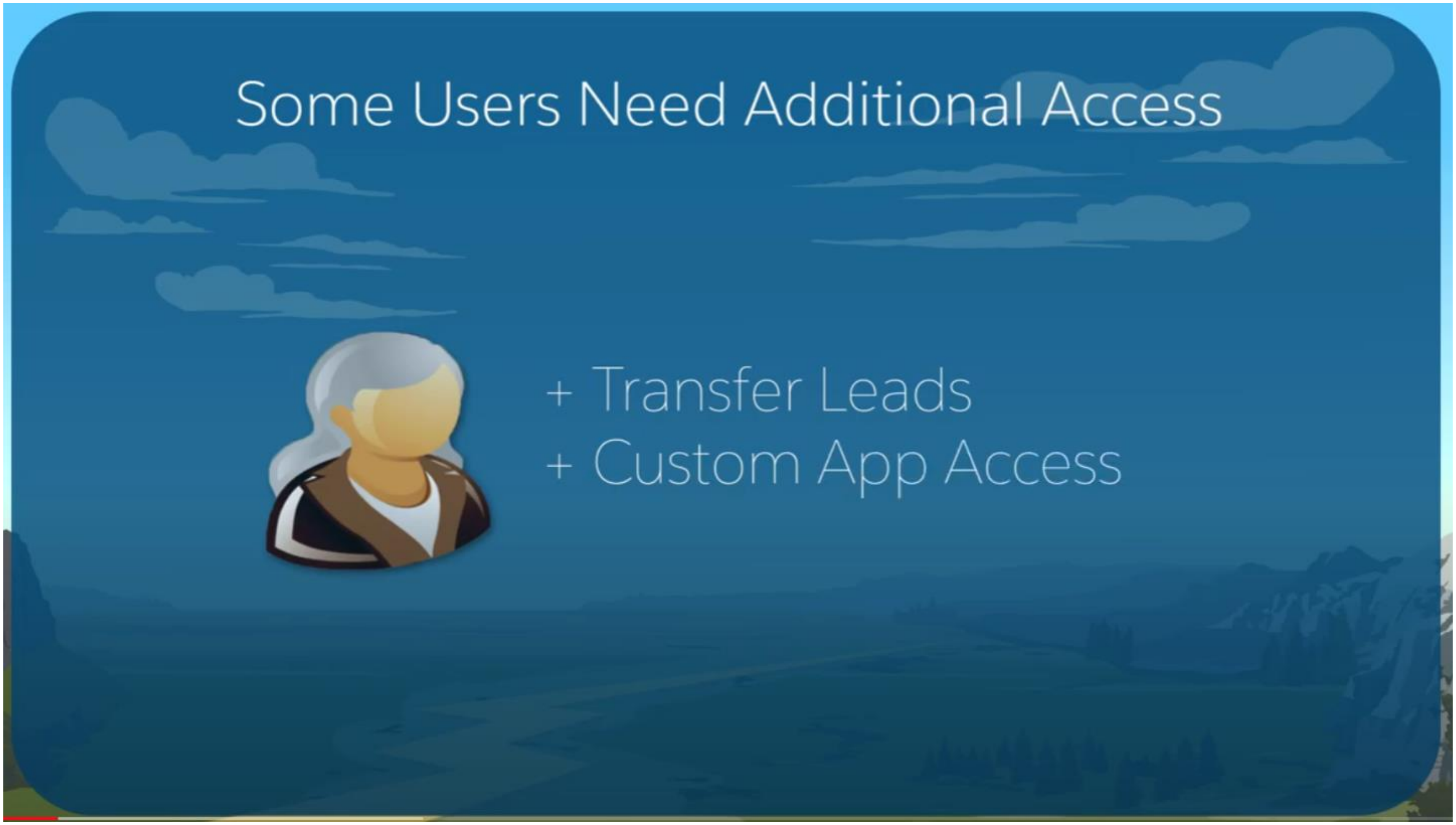


ID	CASENUM	TYPE	RECORDTYPEID	SUBJECT	DESCRIPT
500U000000HyrKRIA	1003	Problem	012U0000000WaClIAK	Customer experiencing service lag	Custome running r
500U000000HyrrfIAB	1005	Question	012U0000000WaCgIAK	Internal: Connor McCoy, payroll question	Connor h paycheck
500U000000Hyrt7IAE	1006	Feature Request	012U0000000WaClIAK	Spider Laptop memory upgrade	Custome installed
500U000000HyrqhIA	1004	Problem	012U0000000WaCgIAK	Internal: Nina Gupta needs a new keyboard	Nina in H
500U000000HysDbIA	1007	Pending Department Approval	012U0000000WaCgIAK	Payroll Problem	Payroll P
500U000000HysDgIA	1008	Problem	012U0000000WaClIAK	Spider Laptop not enough memory	Custome

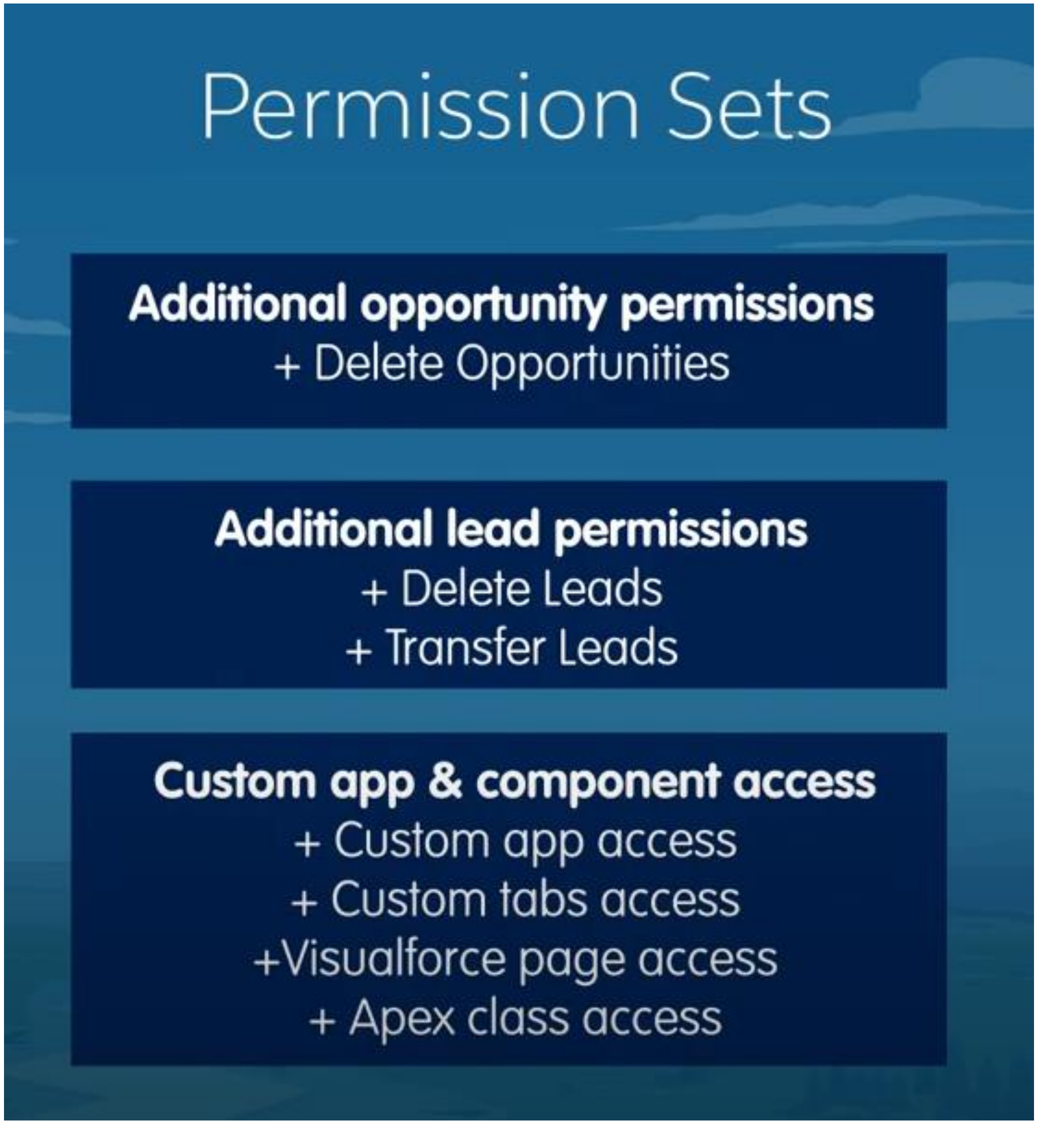
Use Data Loader Update to modify records with new IDs:

08 Permission Sets

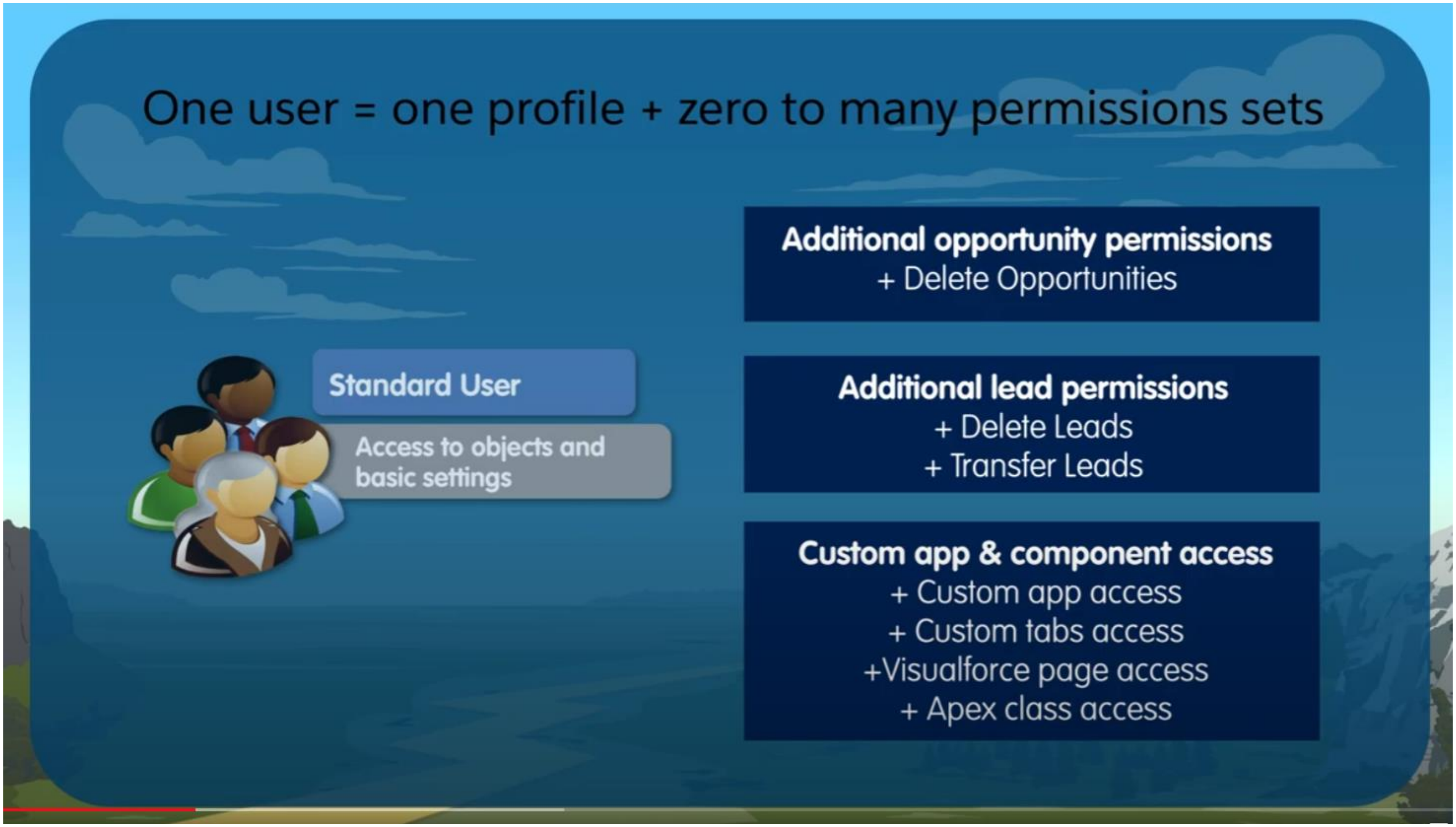

The Big Picture
ORG ACCESS
IP RANGES, LOGIN HOURS
PERMISSIONS & SETTINGS
PROFILES GIVE ACCESS TO: OBJECTS, TABS, FIELDS & MORE
RECORD ACCESS
ROLE HIERARCHY
FIELD ACCESS
FIELD LEVEL SECURITY



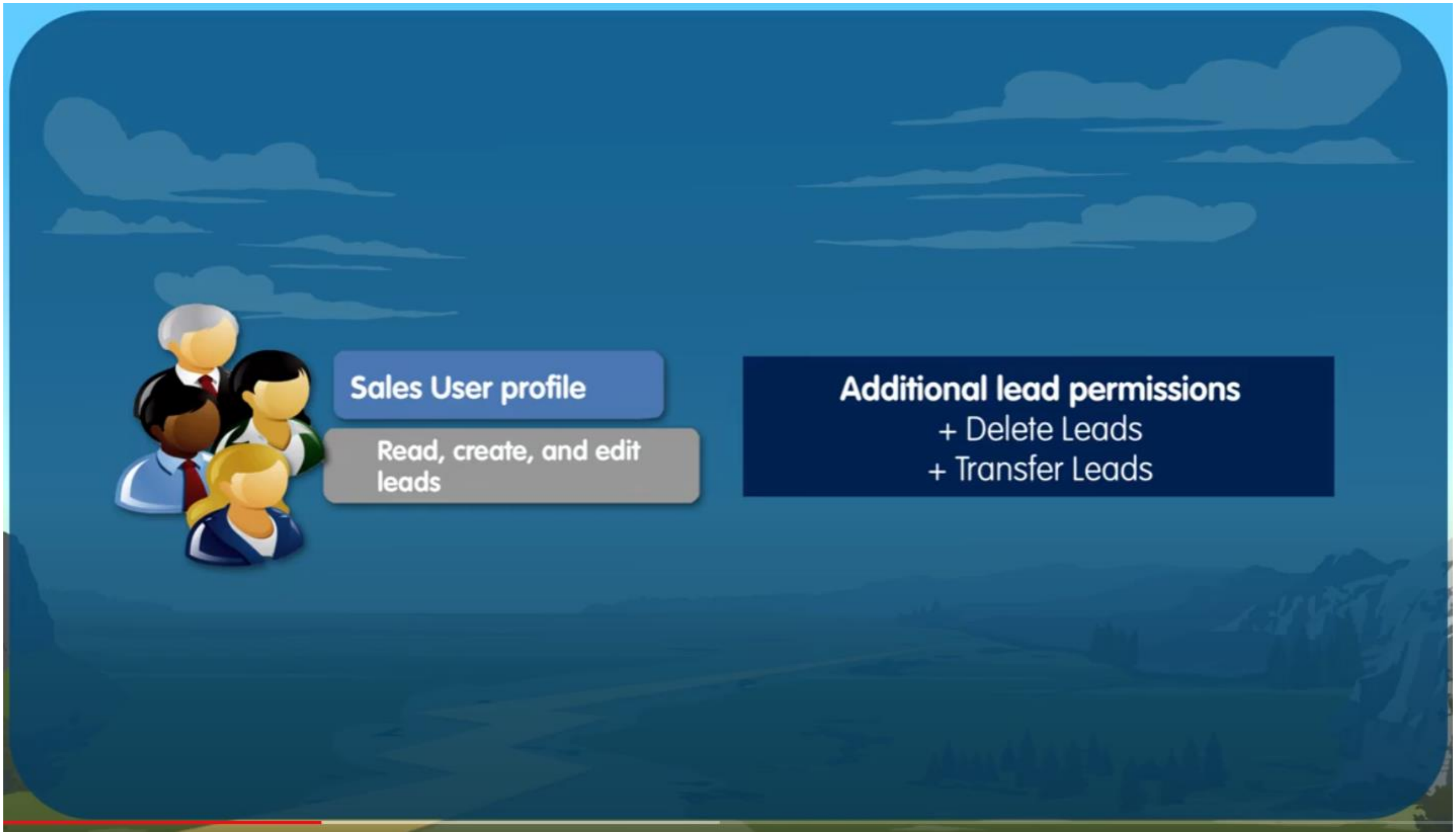
Standard profile + special permission. Additional access is granted through Permission Sets. You can have 0 to Many permission sets.

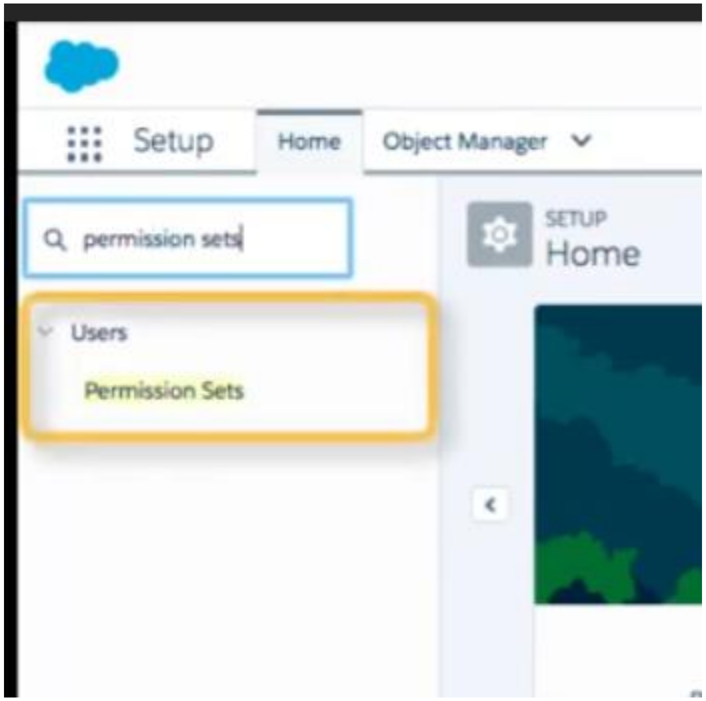


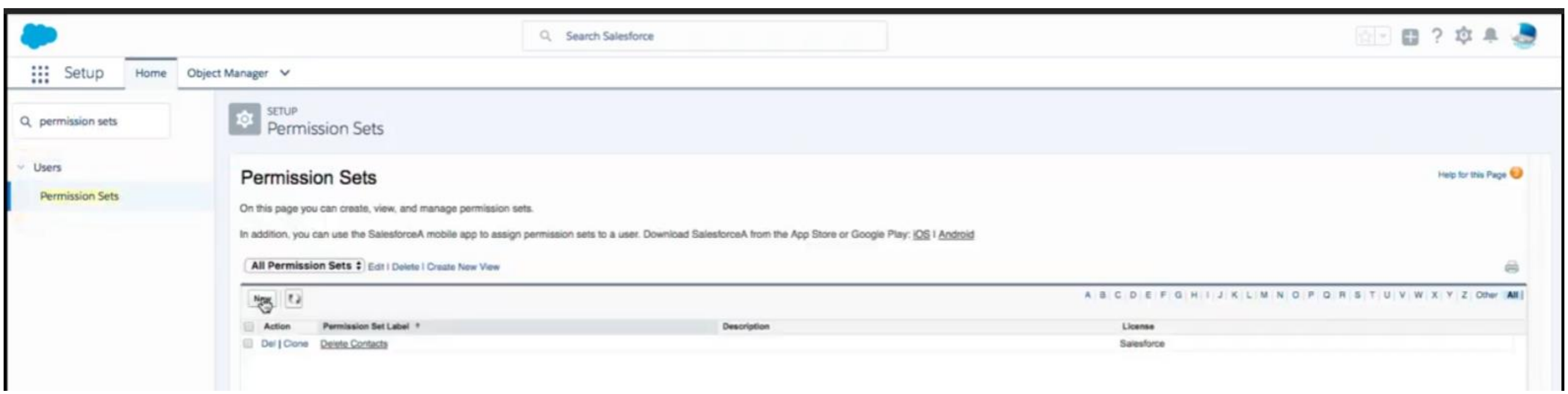
User: One Profile, but you can have as many Permission Sets as needed


One user = one profile + zero to many permissions sets
Standard User
Access to objects and basic settings
Additional opportunity permissions
+ Delete Opportunities
Additional lead permissions
+ Delete Leads
+ Transfer Leads
Custom app & component access
+ Custom app access
+ Custom tabs access
+Visualforce page access
+ Apex class access

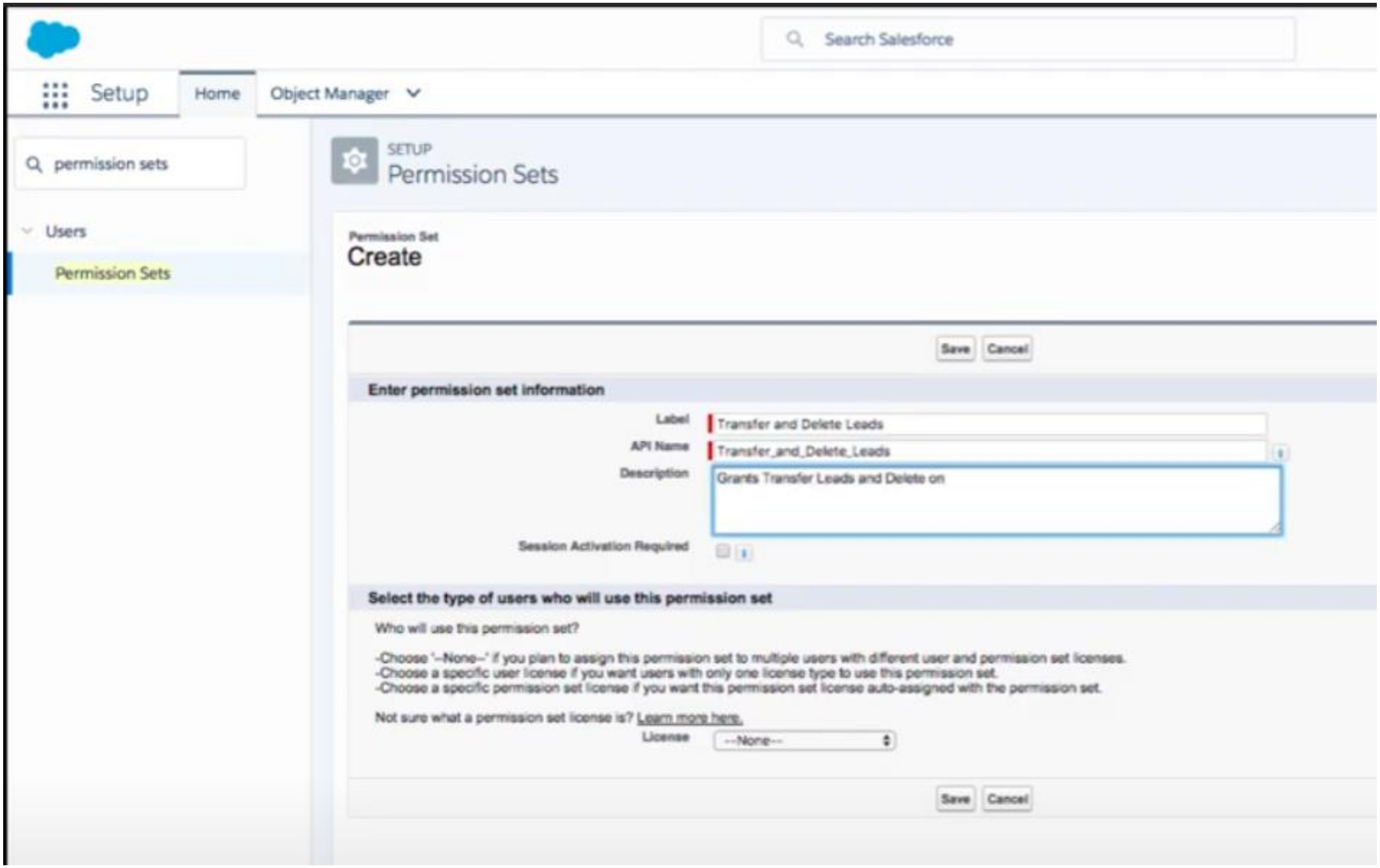
Permission Sets are created to provide additional permission.




Setup
Home
Object Manager
permission sets
Users
Permission Sets
SETUP
Home


Search Salesforce
Setup
Home
Object Manager
permission sets
Users
Permission Sets
SETUP
Permission Sets
Permission Sets
Help for this Page
On this page you can create, view, and manage permission sets.
In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: iOS | Android
All Permission Sets
Edit | Delete | Create New View
New
Action
Permission Set Label
Description
License
Del | Clone
Delete Contacts
Salesforce

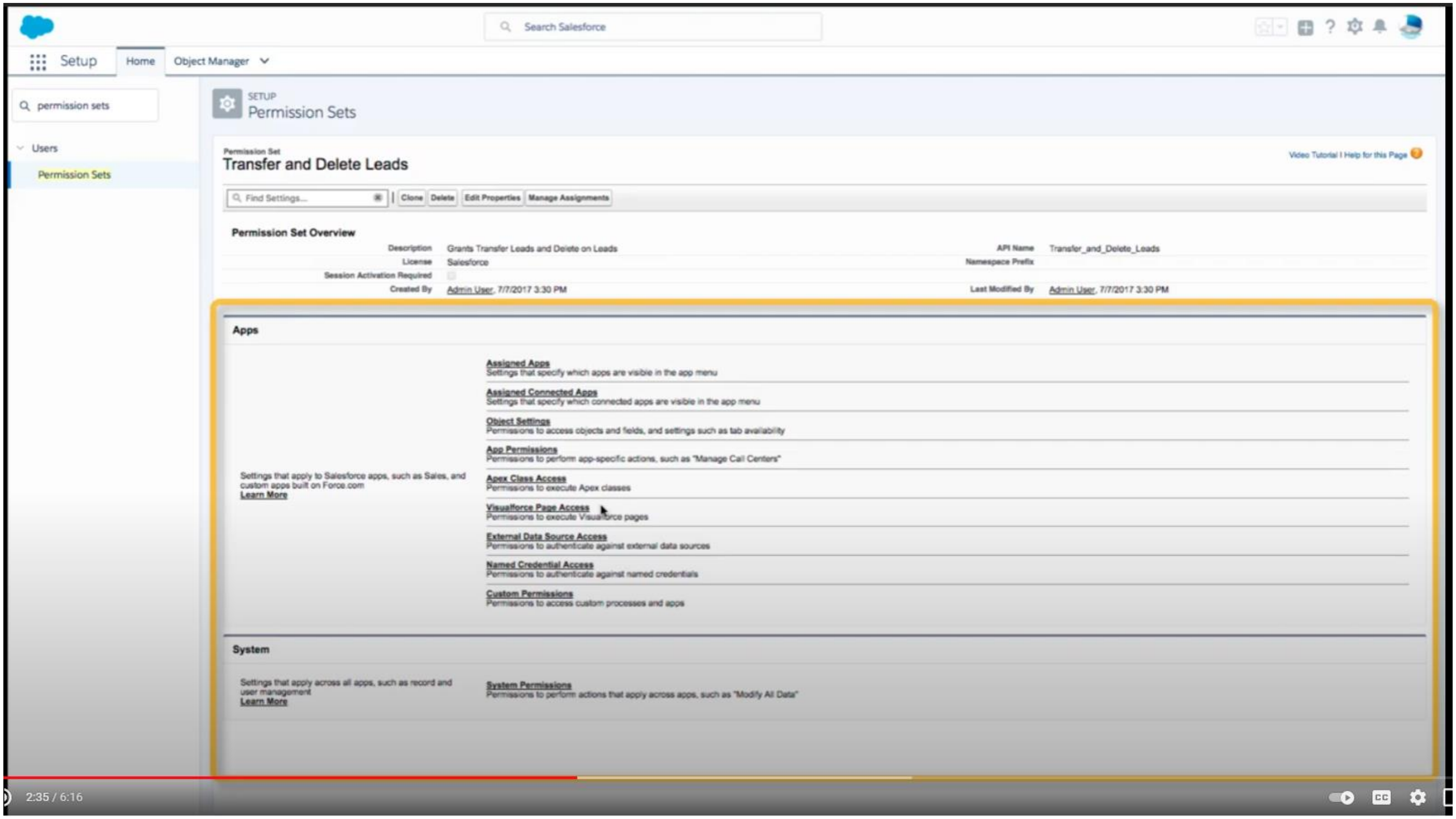
Click on New.



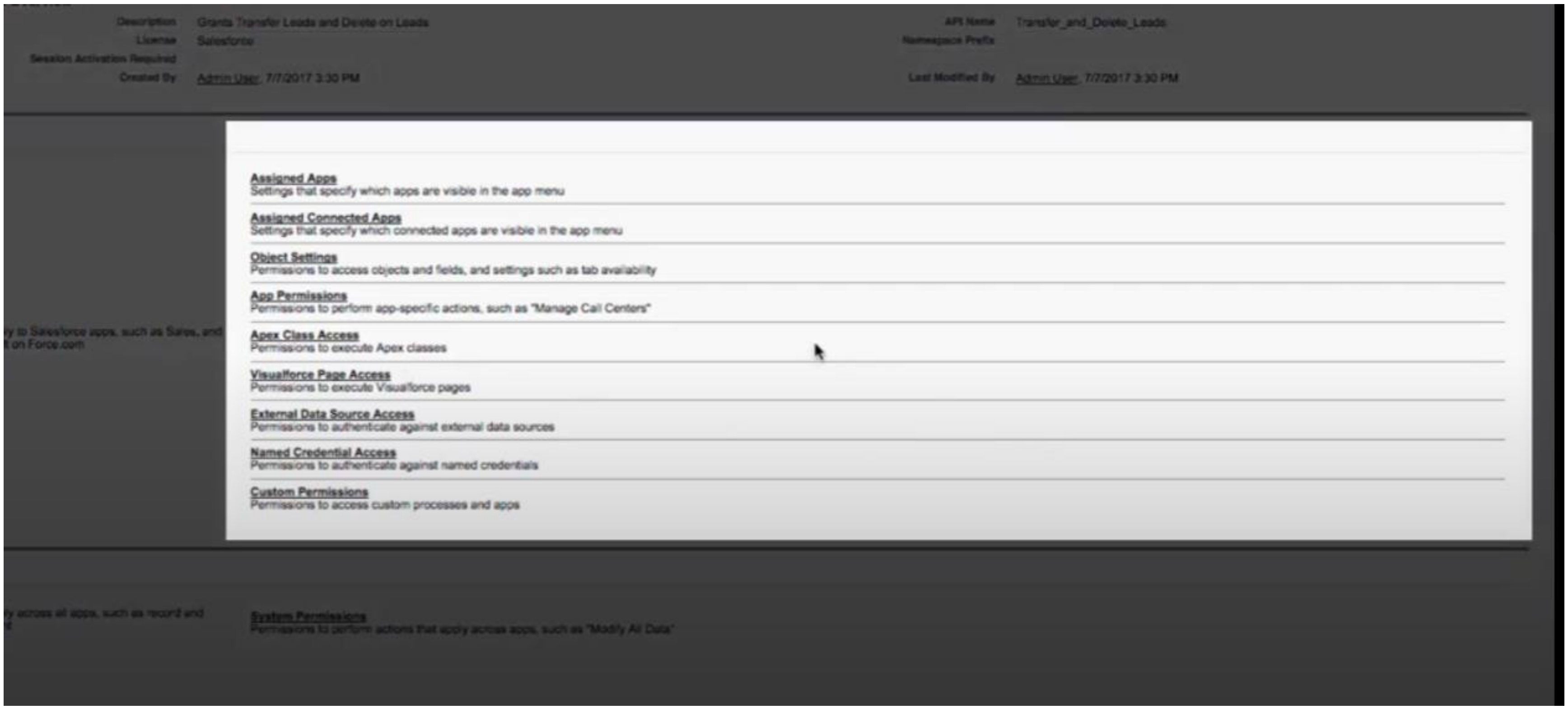
Description should include the Permissions and Settings that will be enabled in the Permission Set.

License must match the license of the users that will get this Permission Set.

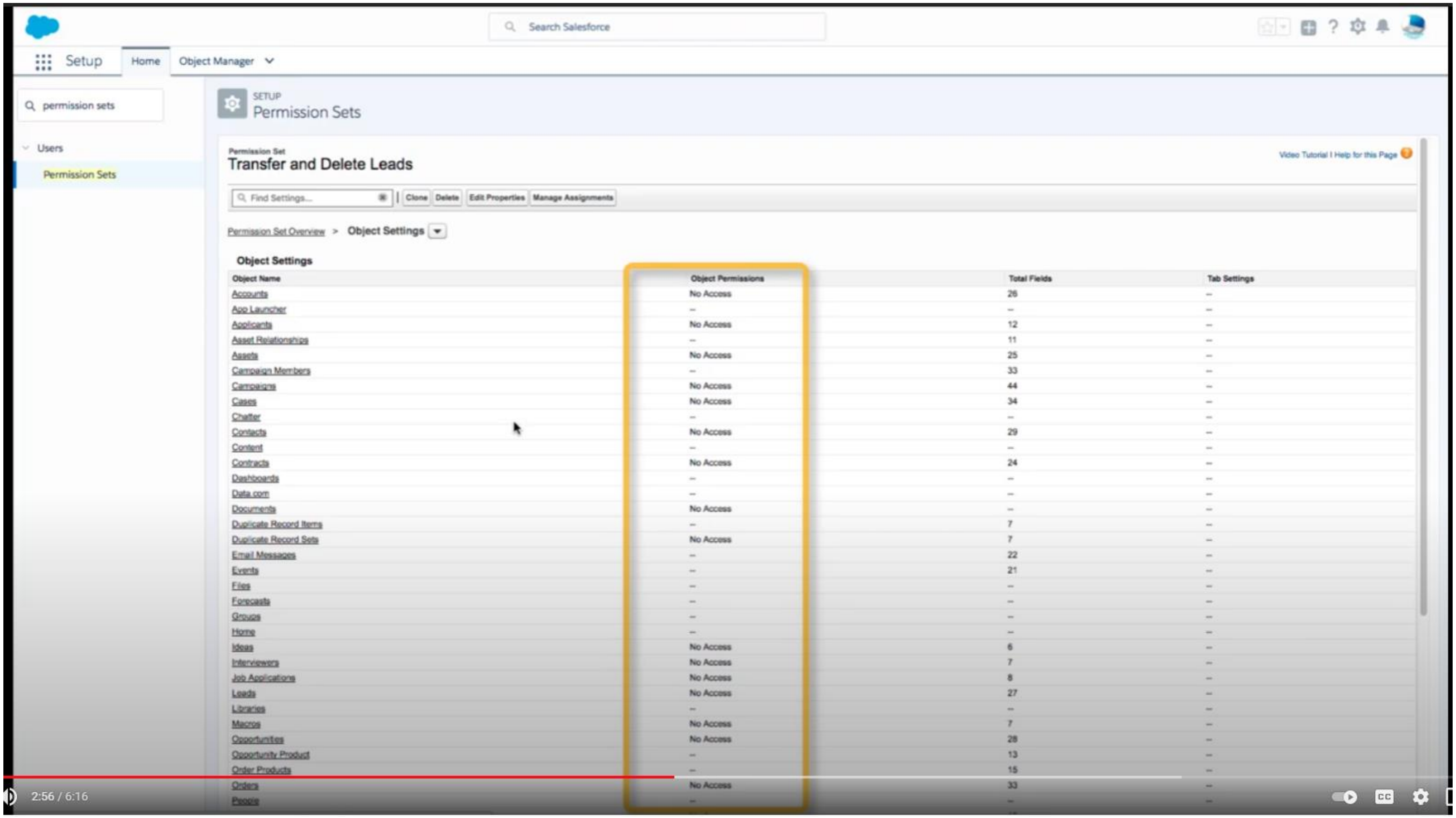
Permission Overview page has two parts, Apps and System settings:



App Settings:

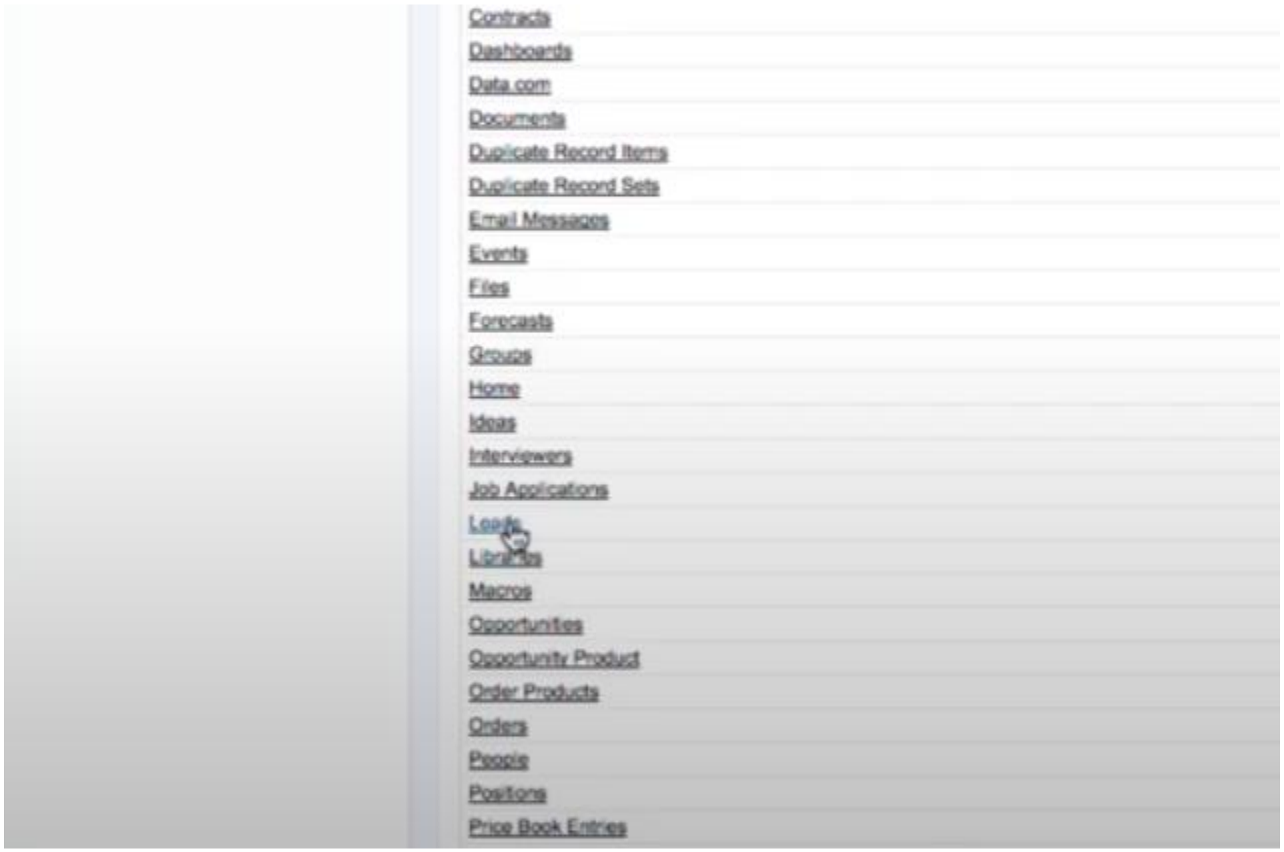


Click on Object Settings:

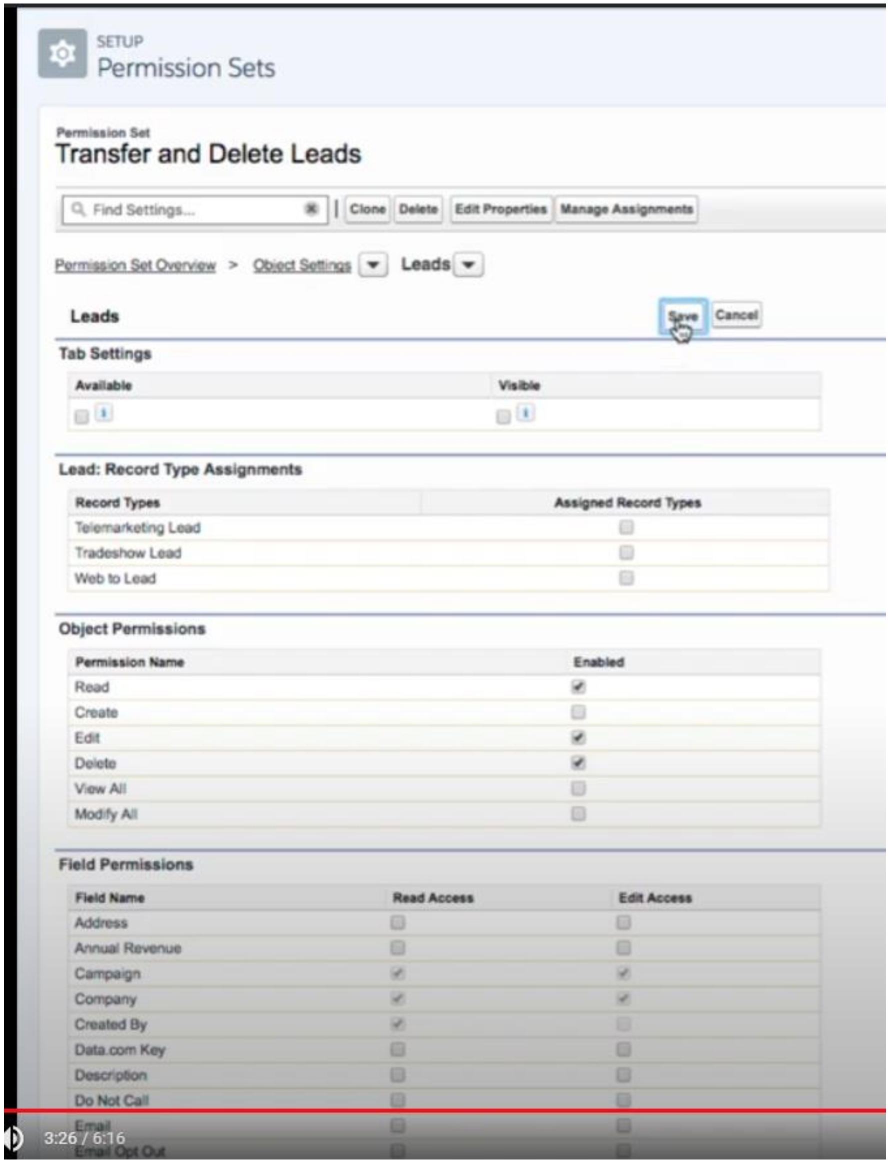


No permissions are enabled.

Click on Leads object:

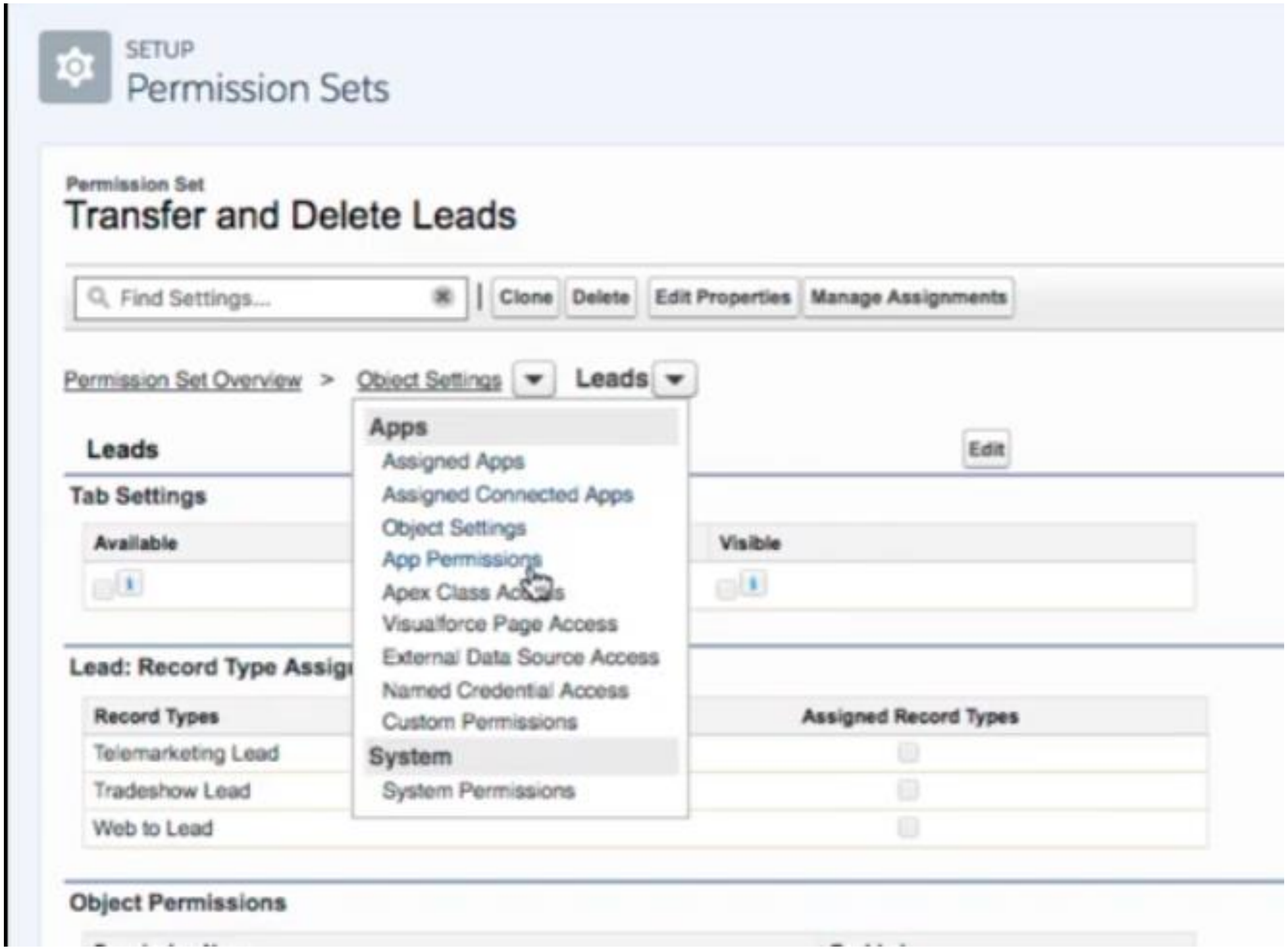


Modify settings as required:

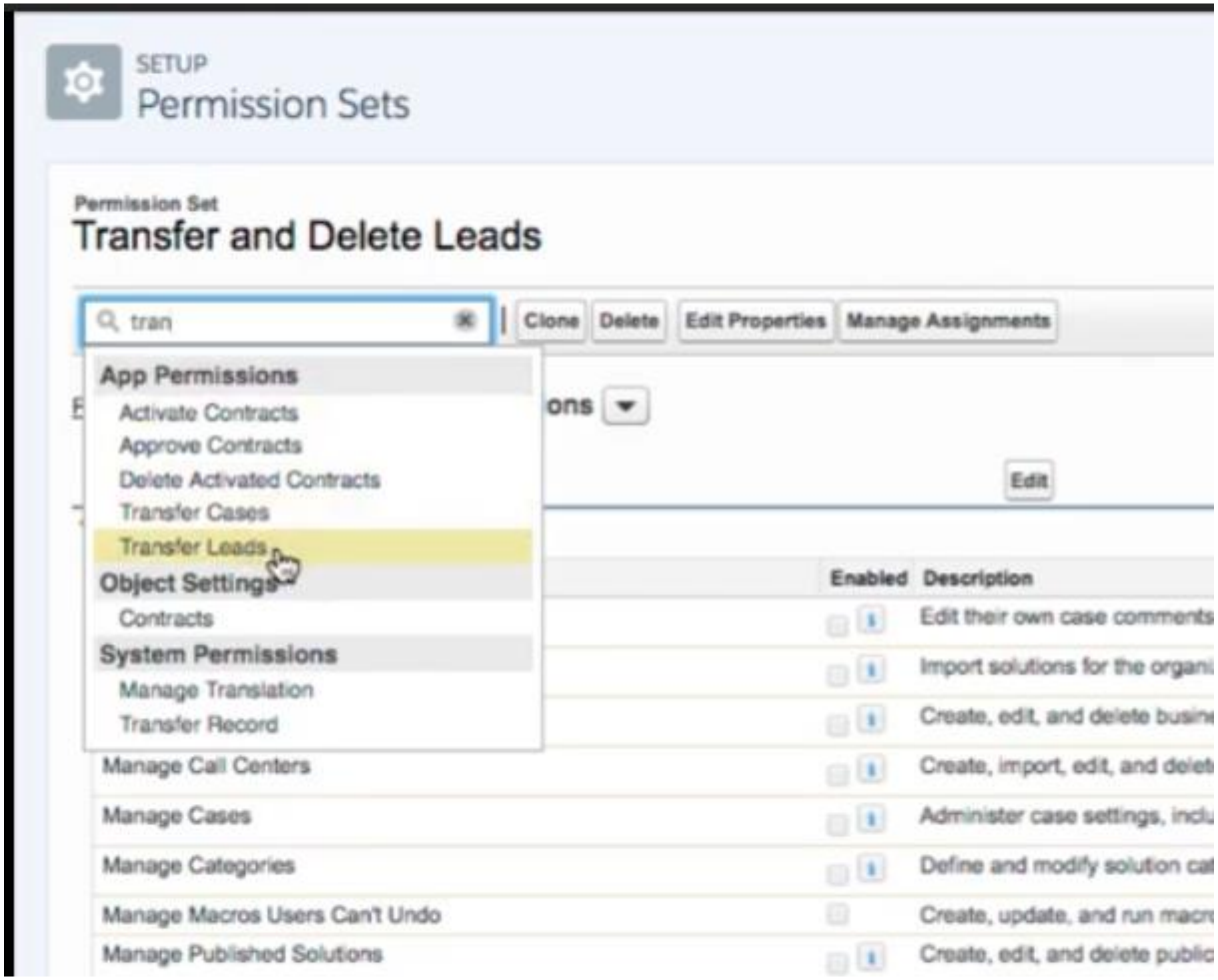


Enable Transfer Lead permission, but it is on another page. There are a couple of ways to access the Transfer Leads permission.

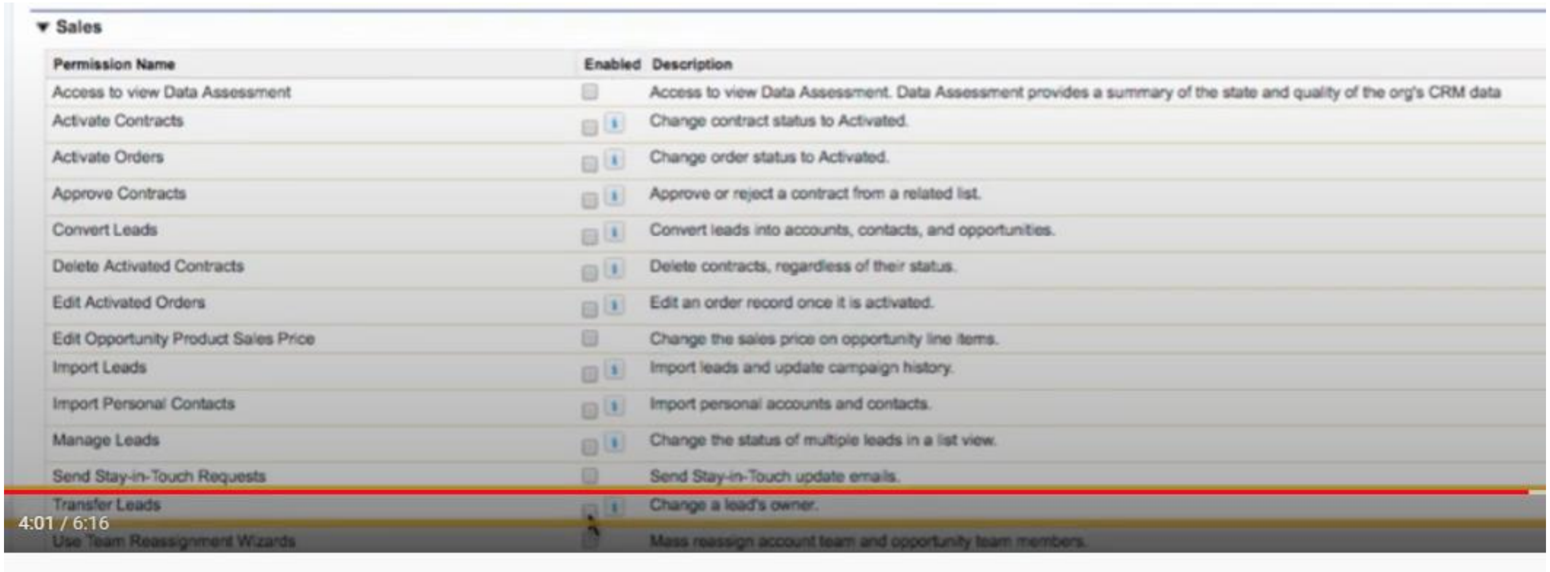
From Object Settings drop down arrow:



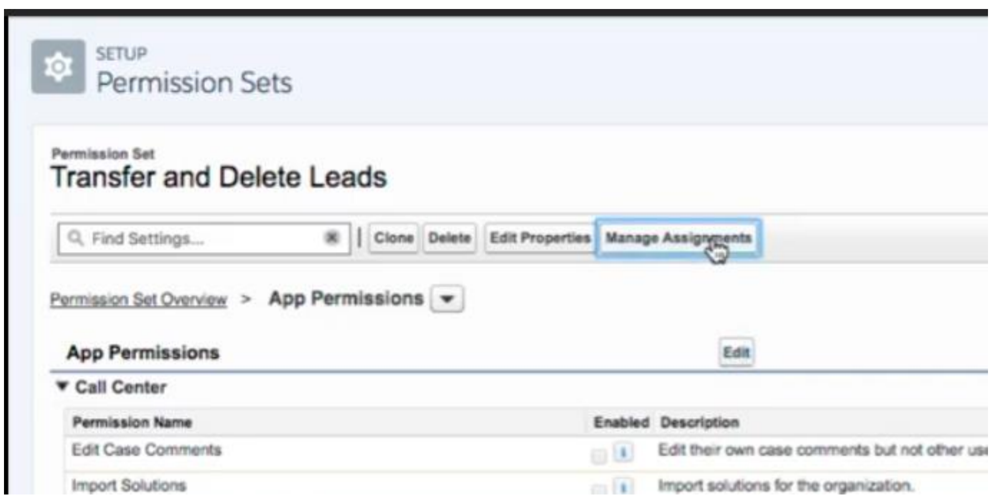
Using search criteria:



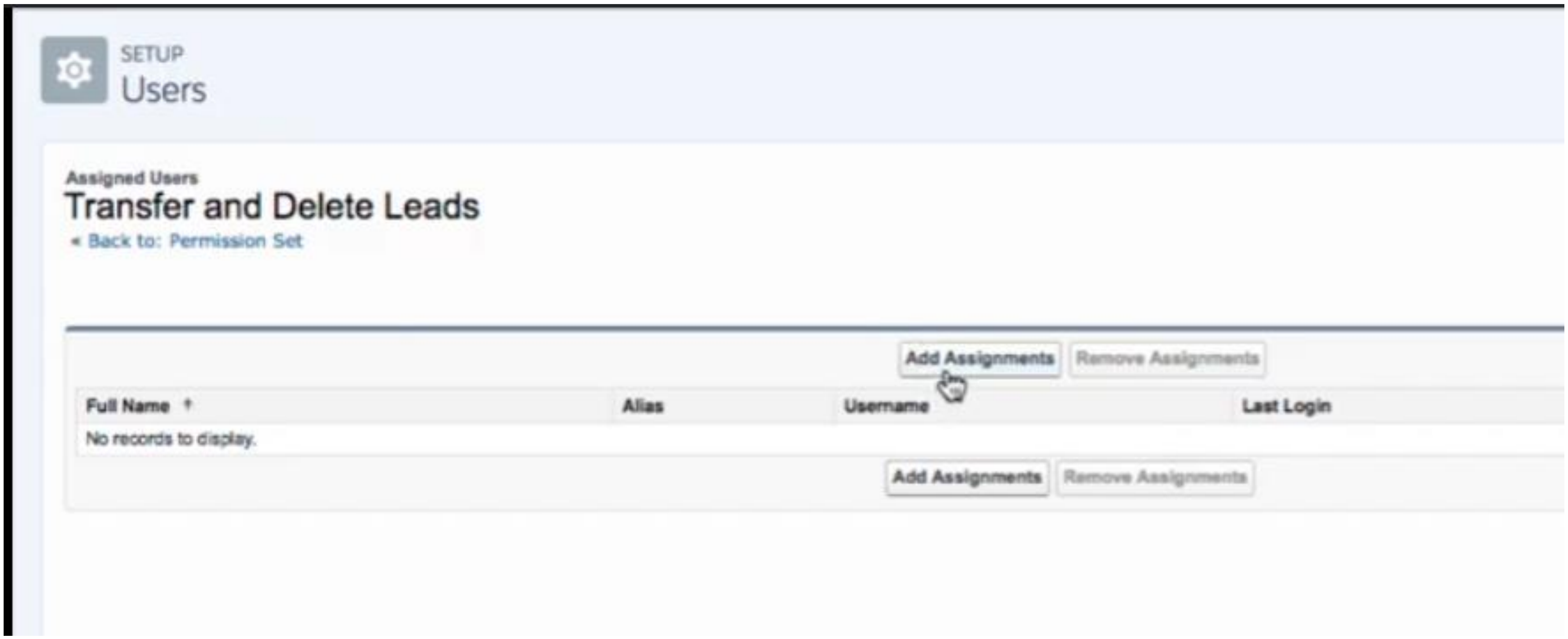
Enable Transfer Leads:



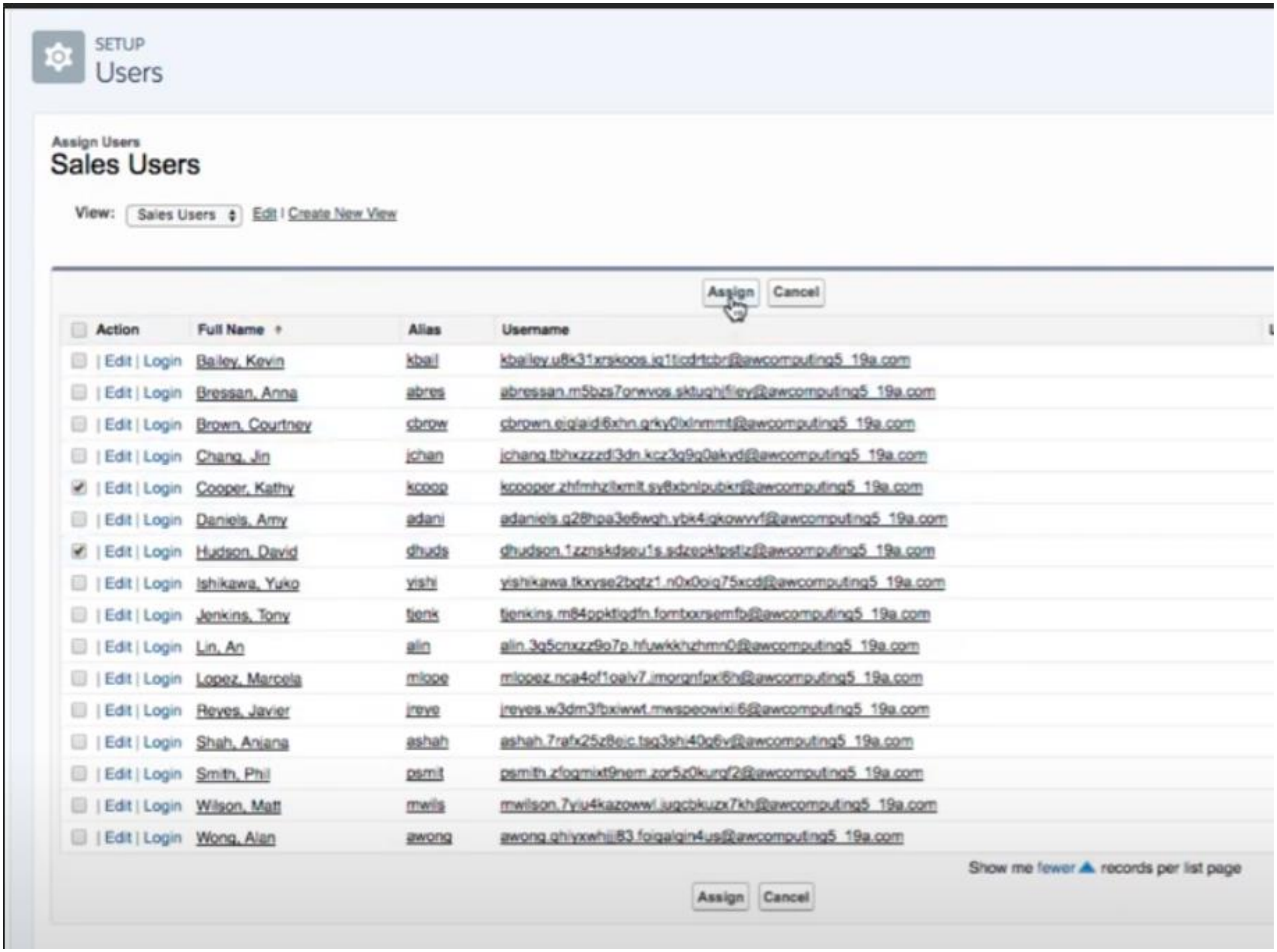
Assign to User – Click on Manage Assignments:



Click on Add Assignments:

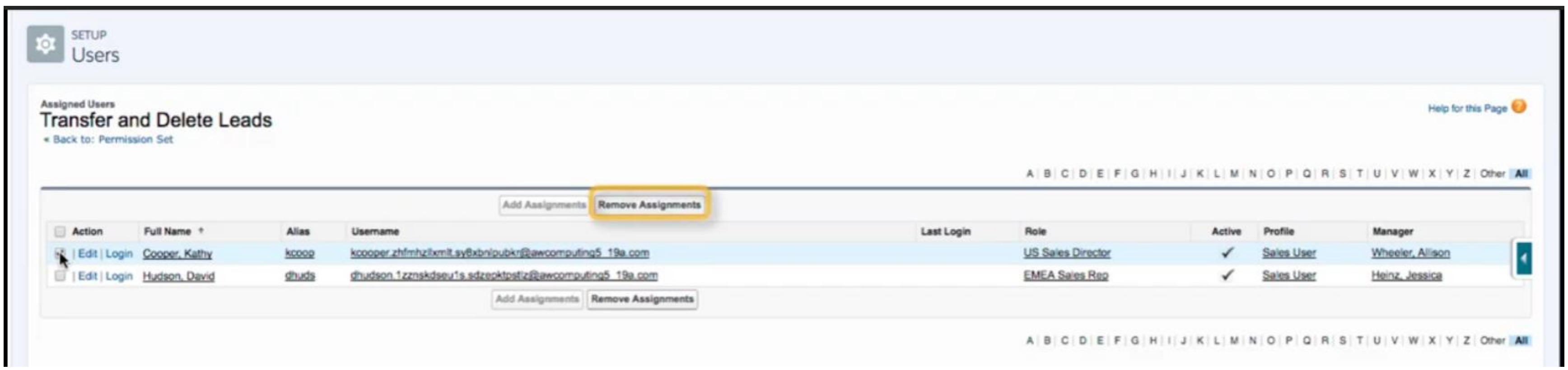


View: Sales Users profile – users that have this profile. The select users to be assigned to this Permission Set.

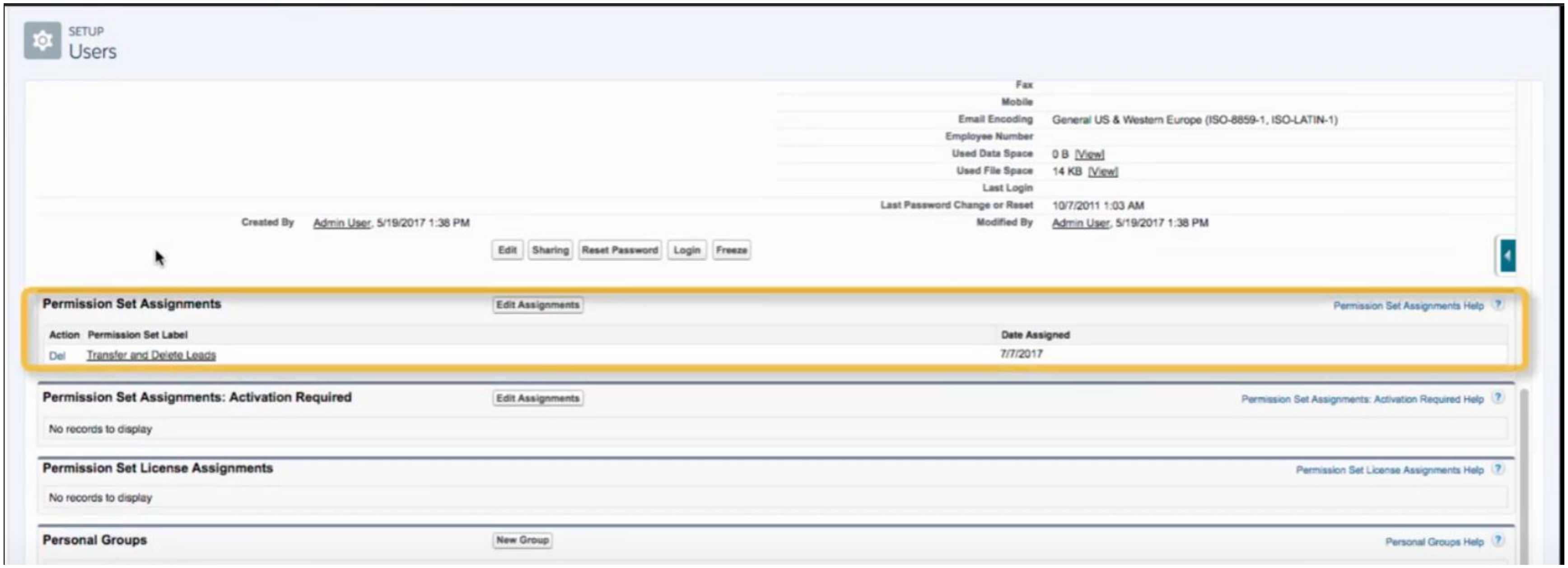


Assignment Summary page shows what has been done:

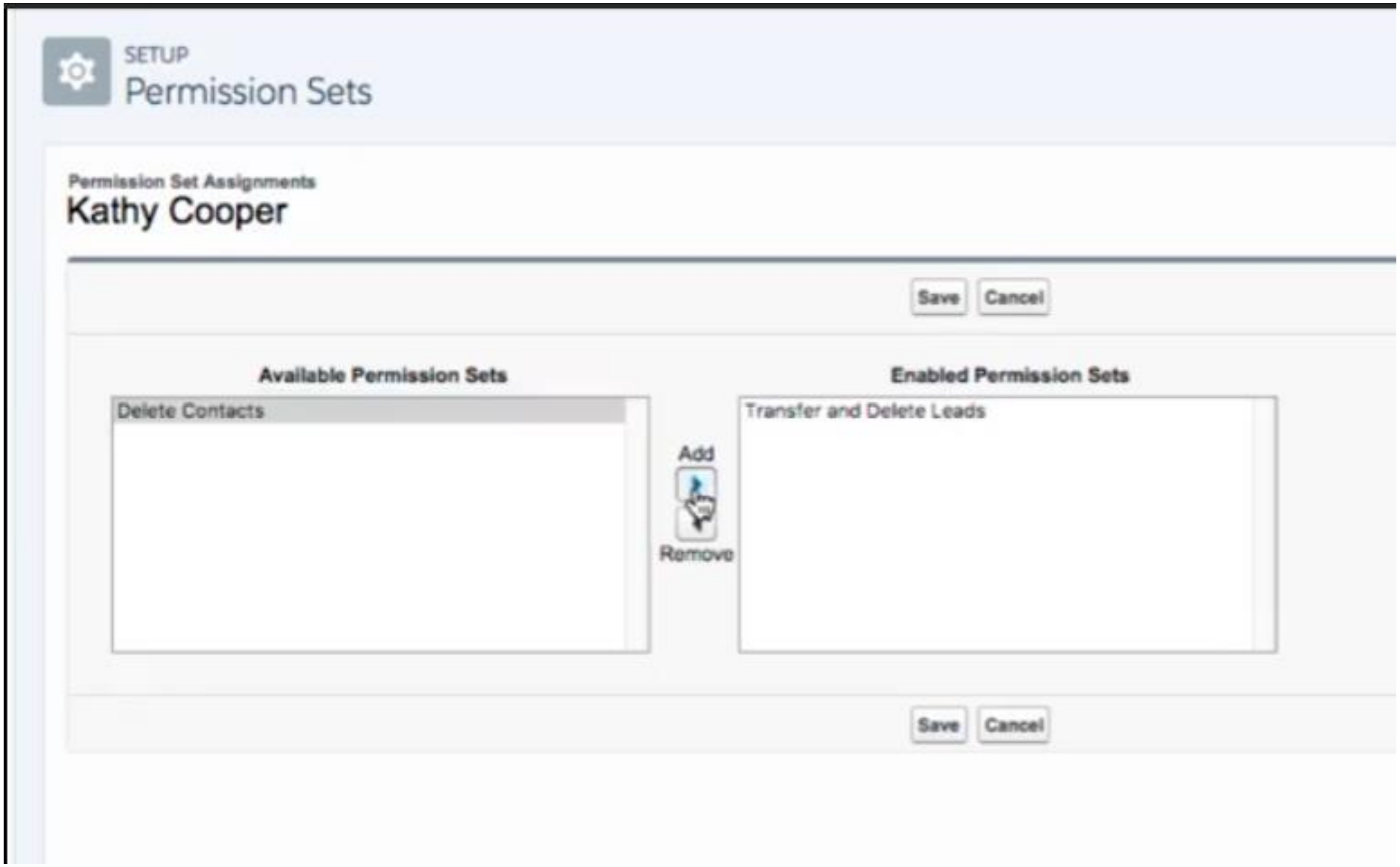
Remove Assignments:



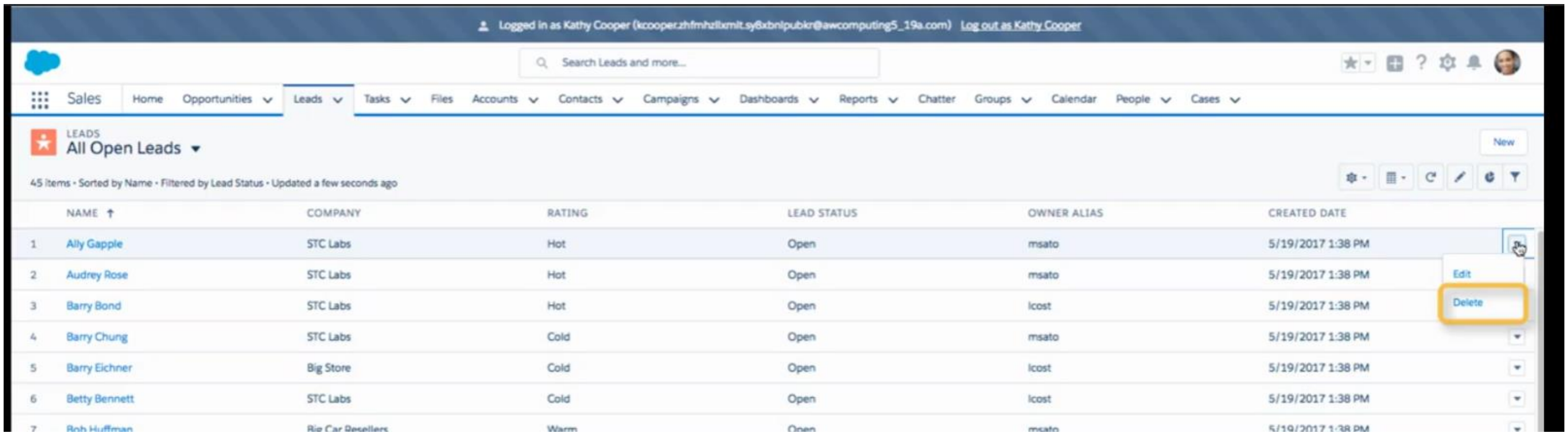
Users detail page – can assign permission sets, especially useful if you have to assign multiple permission sets.



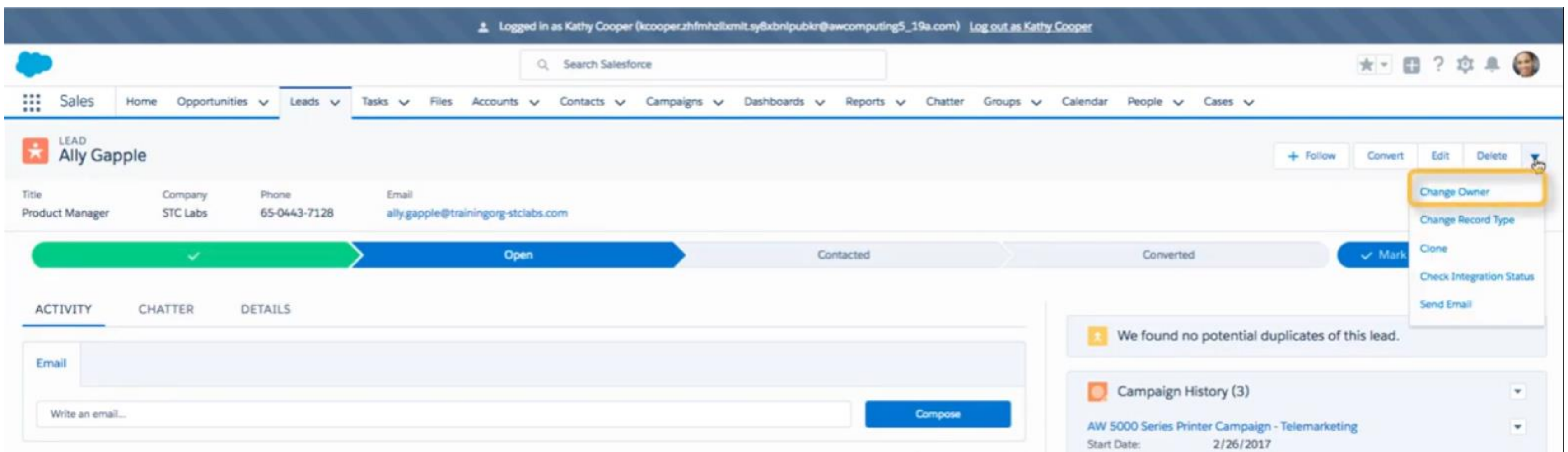
Add or remove Permission Sets as needed:



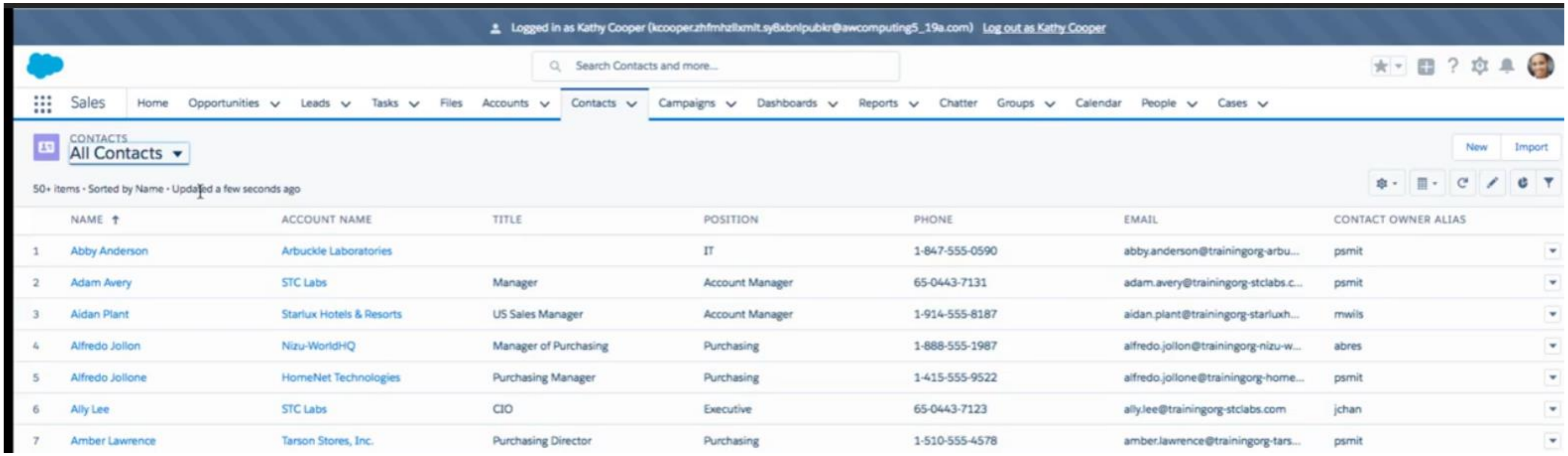
Logged in as Kathy Sales User with additional Permission Sets:



Transfer Lead to new owner:



See Contacts:



No profiles had to be changed – only Permission Sets were created and assigned to the appropriate user.