



How-to Series: Data Visibility

WHO SEES WHAT OVERVIEW



salesforce

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01 Organization Access





Setup Home Object Manager ▾

Network Access

Security Network Access

Did you find what you're looking for? Try using Global Search.

SETUP Network Access

Network Access

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.				

Help for this Page ?

Setup Home Object Manager ▾

profiles

Users Profiles

Did you find what you're looking for? Try using Global Search.

SETUP Profiles

Login Hours

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.

All times are in (GMT-08:00) Pacific Standard Time (America/Los_Angeles)

Day	Start Time	End Time	Action
Sunday	--None--	--None--	Clear times
Monday	--None--	--None--	Clear times
Tuesday	--None--	--None--	Clear times
Wednesday	--None--	--None--	Clear times
Thursday	--None--	--None--	Clear times
Friday	--None--	--None--	Clear times
Saturday	--None--	--None--	Clear times
Clear all times			

Save Cancel

To control organization access use...

**ORG
ACCESS**

IP RANGES, LOGIN HOURS

IP Ranges (company level)
Users outside the range are sent an activation code

IP Ranges (profile level)
Users outside this range are denied access

Login Hours (profile level)
Specified hours are enforced

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





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

Action	Profile Name ↑	User License	Custom
<input type="checkbox"/> Edit Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter External User	Chatter External	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Contract Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom: Marketing Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom: Sales Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom: Support Profile	Salesforce	<input checked="" type="checkbox"/>

Setup Home Object Manager ▾

Assistant

New Salesforce Mobile App

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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](#)

Action	Full Name ↑	Alias	Username
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d5y000001bzwoua2.st4wz6bnhn0h@chatter.salesforce.com
<input type="checkbox"/> Edit	Cordero, Samantha	scord	scordero02252021@cmgmai1.com
<input type="checkbox"/> Edit	Monreal, Conrad	CMonr	conrad.monreal@curious-unicorn-6suk0b.com
<input type="checkbox"/> Edit	User_Integration	integ	integration@00d5y000001bzwoua2.com
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00d5y000001bzwoua2.com

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

The screenshot shows the Salesforce Setup interface under the Profiles section. The left sidebar includes links for 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 (Apps, Feature Settings, Workflow Services, Einstein, Objects and Fields, Events, Process Automation), and Help & Support.

The main content area is titled "Profiles" and displays "Standard Object Permissions". It states: "The permissions defined here control access at the object level. Access to individual records within that object type is controlled by the sharing model. Set access levels based on the functional requirements for the profile. For example, create different groups of permissions for individual contributors, managers, and administrators. [How do I choose?](#)"

Two tables of checkboxes represent permissions for various objects:

	Basic Access						Data Administration	
	Read	Create	Edit	Delete	View All <small>i</small>	Modify All <small>i</small>		
Accounts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Addresses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input 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"/>		
Assets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Asset Actions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Asset Action Sources	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Asset State Periods	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Authorization Forms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Authorization Form Consents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Authorization Form Data Uses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Authorization Form Texts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Campaigns	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Card Payment Methods	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Cases	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Coaching	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

	Basic Access						Data Administration	
	Read	Create	Edit	Delete	View All <small>i</small>	Modify All <small>i</small>		
Feedback Templates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Finance Balance Snapshots	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Finance Transactions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Gateway Provider Payment Method Types	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Goals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Goal Links	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Ideas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Images	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Individuals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Internal Organization Units	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input 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 type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Macros	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Metrics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Metric Data Links	<input type="checkbox"/>	<input type="checkbox"/>	<input 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"/>		

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

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

SETUP

Users

User Edit
Samantha Cordero

User Edit

Save Save & New Cancel

General Information

First Name	Samantha
Last Name	Cordero
Alias	scord
Email	conrad.monreal@gmail.com
Username	scordero02252021@cmgma
Nickname	scordero02252021@cmgma 
Title	
Company	
Department	
Division	

Role <None Specified>

User License Work.com Only

Profile Work.com Only User 

Active

Marketing User

Offline User

Knowledge User

Flow User

Service Cloud User

Site.com Contributor User

Role <None Specified>

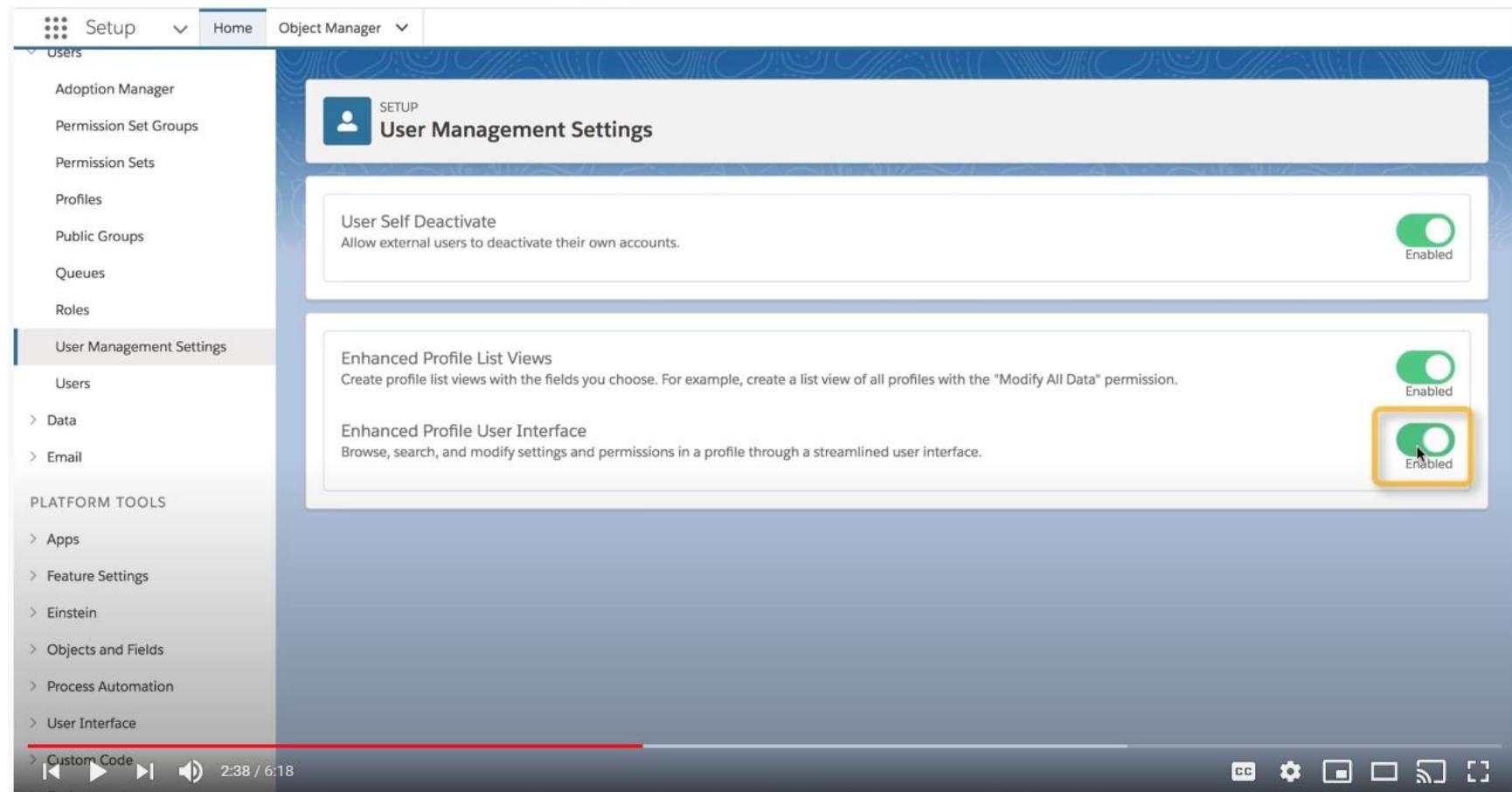
User License Work.com Only

Profile Work.com Only User 

Active

Marketing User

Offline User



- 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 has access
 - App specific permissions
 - Example – Manage Call Centers for the Call Center App

The screenshot shows the 'Profile' section for the 'Inside Sales Rep' profile. At the top, there's a navigation bar with 'Find Settings...', 'Clone', 'Delete', and 'Edit Properties' buttons. Below that is a breadcrumb trail: 'Profile Overview > App Permissions'. The main area is titled 'App Permissions' and has a sub-section titled 'Call Center'. A table lists various permissions:

Permission Name	Enabled	Description
Edit Case Comments	<input type="checkbox"/>	Edit their own case comments but not other user's comments.
Import Solutions	<input type="checkbox"/>	Import solutions for the organization.
Manage Business Hours Holidays	<input type="checkbox"/>	Create, edit, and delete business holidays.
Manage Call Centers	<input type="checkbox"/>	Create, import, edit, and delete a call center configuration.
Manage Cases	<input type="checkbox"/>	Administer case settings, including Email-to-Case and mass transfer of cases.

In the 'Assigned Apps' section of the top-level interface, the 'App Permissions' item is highlighted with a yellow box. In the 'Call Center' section of the detailed view, the 'Manage Call Centers' permission is also highlighted with a yellow box.

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

- System permissions – work across the entire app
- Examples

System

System Permissions
Permissions to perform actions that apply across apps, such as "Modify All Data"

Desktop Client Access
Permissions to access desktop clients, such as "Connect for Office"

Login Hours
Settings that control when users can log in

Login IP Ranges
Settings that control the IP addresses from which users can log in

Create or Edit User

Action	Permission
Configure Custom Recommendations	<input type="checkbox"/> Add custom recommendations in the feed, motivating users to get engaged and take action.
Connect Organization to Environment Hub	<input type="checkbox"/> Allows a user to connect this organization to an Environment Hub.
Create and Customize Dashboards	<input type="checkbox"/> Create, edit, and delete dashboards in personal folders.
Create and Customize List Views	<input checked="" type="checkbox"/> Create list views; modify and delete own list views.
Create and Customize Reports	<input checked="" type="checkbox"/> Create, edit, and delete reports in personal folders.

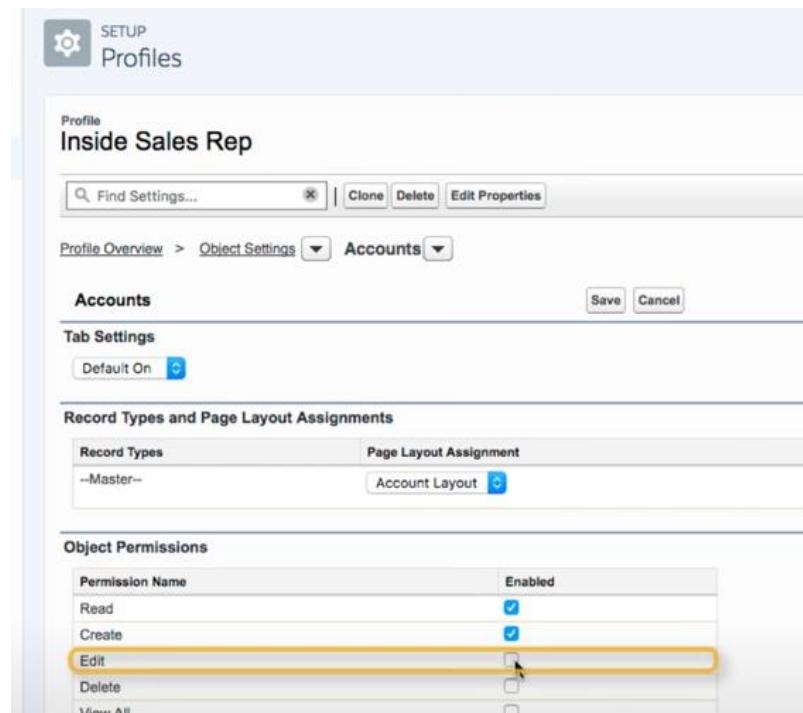
Action	Permission
Edit My Own Posts	<input checked="" type="checkbox"/> Allow users to edit their own feed items.
Edit My Reports	<input type="checkbox"/> Edit, move, save, and delete user's own reports in shared folders.
Edit Posts on Records I Own	<input type="checkbox"/> Allow users to edit feed items they manage.
Edit Read Only Fields	<input type="checkbox"/> Edit fields that are read only due to page layouts or field-level security.
Edit Tasks	<input checked="" type="checkbox"/> Create, edit, and delete tasks.
Edit Topics	<input checked="" type="checkbox"/> Edit topic names and descriptions.
Export Reports	<input checked="" type="checkbox"/> Use Export Details and Printable View to export reports.

- 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

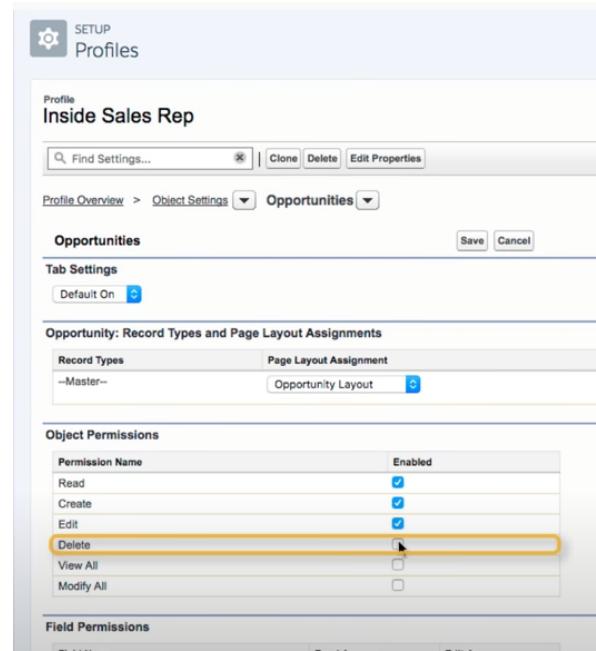
The screenshot shows the Salesforce Setup interface with the following details:

- Header:** SETUP / Profiles
- Profile Name:** CM_Test_FieldSalesUser_01
- Actions:** Find Settings..., Clone, Delete
- Navigation:** Profile Overview > Assigned Apps
- Assigned Apps List:**
 - All Tabs (standard_
 - Analytics Studio (sta
 - App Launcher (standa
 - Bolt Solutions (stan
 - Commerce (standard
 - Community (standar
 - Content (standard_
 - Lightning Usage App
 - Marketing (standard
 - Playground Starter (
 - Sales (standard__Li
 - Sales (standard__Sa
 - Sales Console (stan
 - Salesforce Chatter (
 - Salesforce CMS (standa
 - Sample Console (standa
 - Service (standard__Se
- Open Dropdown Menu:** Assigned Apps
 - Apps**
 - Assigned Apps
 - Assigned Connected Apps
 - Object Settings
 - App Permissions
 - Apex Class Access
 - Visualforce Page Access
 - External Data Source Access
 - Named Credential Access
 - Flow Access
 - Custom Permissions
 - Custom Metadata Types
 - Custom Setting Definitions
 - System**
 - System Permissions
 - Desktop Client Access
 - Login Hours
 - Login IP Ranges
 - Service Providers
 - Session Settings
 - Password Policies
 - Default Experience

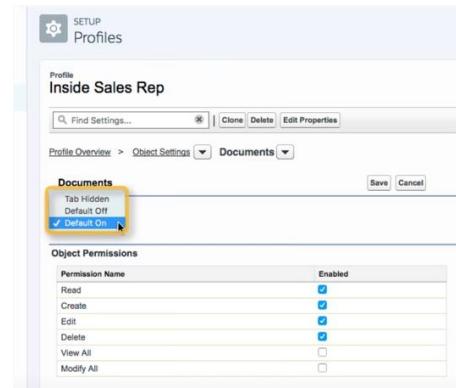
- Click on Object Settings
 - Customize settings for each object as needed
 - Use Object Settings Picklist (drop down list)
- Example Configurations
 - Inside Sales Rep
 - Do NOT want them modifying Accounts
 - Only Marketing team
 - Account Object
 - Object Permissions
 - Clear check box for Edit and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



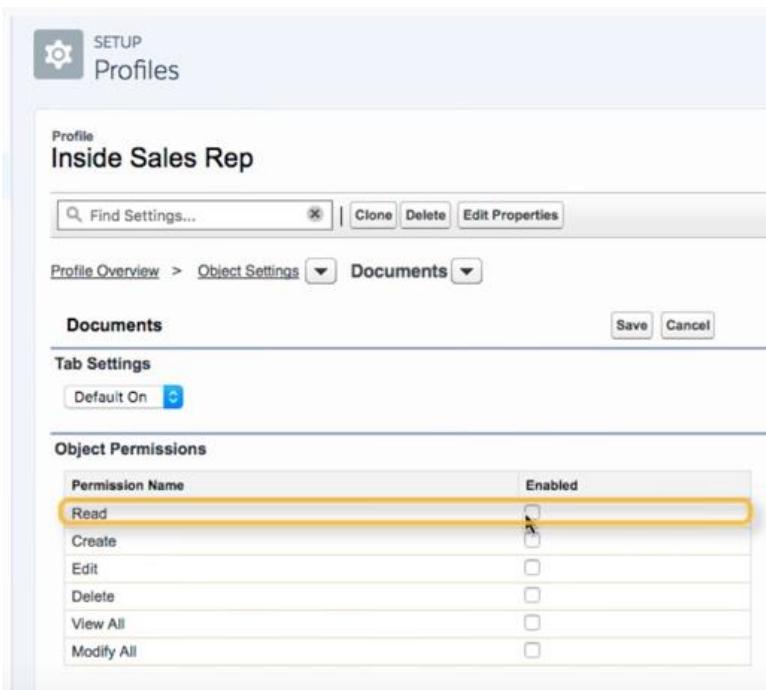
- Contacts Object
 - Leave as is, Inside Sales Rep should be in contact with Clients and updating their Contact records.
- Opportunities Object
 - Inside Sales Rep – Do NOT delete opportunity record.
 - If Opportunity is lost, keep record in system
 - Remove check mark in Delete
 - Part of evaluation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



The Big Picture

OBJECT
ACCESS



PROFILES
ORG-WIDE DEFAULTS

Org-wide defaults determine
what access and permissions users have
to records they don't own

Go To: Setup/Security/Sharing Settings

Setup Home Object Manager ▾

> Company Settings
 > Data Classification
 > Customer 360 Privacy Center
 > Identity
 < Security
 Activations
 CORS
 CSP Trusted Sites
 Certificate and Key Management
 Delegated Administration
 > Event Monitoring
 Expire All Passwords
 Field Accessibility
 File Upload and Download Security
 Health Check
 Login Access Policies
 Named Credentials
 Network Access
 Outbound Connection Settings
 Password Policies
 > Platform Encryption
 Private Connect
 Remote Site Settings
 Security Alerts
 Session Management
 Session Settings
 Sharing Settings
 Trusted URLs for Redirects
 View Setup Audit Trail

Sharing Settings

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

Manage sharing settings for: [All Objects](#)

[Disable 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/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"/>
Individual	Public Read/Write	Private	<input checked="" type="checkbox"/>
Access	Private	Private	<input type="checkbox"/>
Alternative Payment Method	Private	Private	<input checked="" type="checkbox"/>
Authorization Form	Private	Private	<input checked="" type="checkbox"/>
Authorization Form Consent	Private	Private	<input checked="" type="checkbox"/>
Authorization Form Data Use	Private	Private	<input checked="" type="checkbox"/>
Badge	Public Read Only	Private	<input type="checkbox"/>
Batch Job	Private	Private	<input checked="" type="checkbox"/>
Coaching	Private	Private	<input type="checkbox"/>
Communication Subscription	Private	Private	<input checked="" type="checkbox"/>
Communication Subscription Channel Type	Private	Private	<input checked="" type="checkbox"/>

The Big Picture

OBJECT
ACCESS



PROFILES
ORG-WIDE DEFAULTS

Baseline Access <i>Inside Sales Rep Profile for Records Owned</i>		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

The screenshot shows the Salesforce interface. On the left, there's a sidebar with navigation links like Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, and More. The main area displays the 'CONTACTS' list with the heading 'All Contacts'. It shows two items: 'John Orta...' and 'Spencer ...'. The 'CONTACT...' column for both entries is highlighted with a yellow box. Below this, a detailed view of 'Ms. John Ortaga' is shown, with the 'Edit' button also highlighted with a yellow box.

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

The screenshot shows the Salesforce interface. At the top, there's a navigation bar with icons for Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, and More. Below the navigation bar is a search bar labeled "Search Contacts and more...". The main area displays a "CONTACTS All Contacts" section with a "New" button highlighted by a yellow box. It shows two items sorted by name, both updated a few seconds ago. The contact list includes columns for Name, Account Name, Title, Position, Phone, Email, and Contact Owner. Two contacts are listed: John Ortaga and Spencer. Below the list is a detailed view of John Ortaga, with his title as Vice President, account as Cable Inc., phone number (415) 555-1212, email jortaga@cable.com, and contact owner Kar... A large yellow box highlights the "No Edit or Delete" button at the bottom right of the detail view.

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

The screenshot shows a Microsoft Dynamics 365 Contacts list page titled "All Contacts". The page displays 50+ items sorted by Name, updated a minute ago. The columns include NAME, ACCOUNT..., TITLE, POSITION, PHONE, and EMAIL. A contact search dropdown is open on the right, showing suggestions: psmit, psmit, mwils, and abres. The "New" button is highlighted with a yellow box.

NAME	ACCOUNT...	TITLE	POSITION	PHONE	EMAIL
1 Abby And...	Arbuckle ...	IT	1-847-55...	abby.and...	psmit
2 Adam Ave...	STC Labs	Manager	Account ...	65-0443-...	adam.ave...
3 Aidan Pla...	Starlux H...	US Sales ...	Account ...	1-914-55...	aidan.pla...
4 Alfredo Jo...	Nizu-Wori...	Manager ...	Purchasing	1-888-55...	alfredo.jo...

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

The screenshot shows the Salesforce interface with a contact record for 'Bob Frederick'. A modal window titled 'Edit Contact' is open, displaying an error message: '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.' This indicates that while the user has 'Public Read' access through the baseline layer, they lack the required 'Edit' permission for this specific record.

◀ ▶ ⏪ ⏩ 🔍 5:52 / 7:19

CC ⚙️ 🎞 🎞 🎞

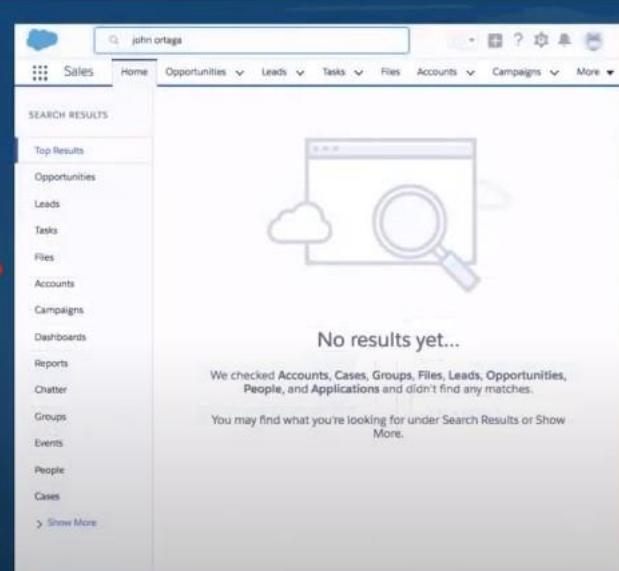
How Do the Layers Work?

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

The screenshot shows the Salesforce Contact page for 'Ms. John Ortaga'. The contact details include Title: Vice President, Account Name: Cable Inc., Phone: (415) 555-1212, Email: jortaga@cable.com, and Contact Owner: Karen ... (with a small profile icon). The page has tabs for RELATED and DETAILS. Under RELATED, it says 'We found no potential duplicates of this contact.' and 'Opportunities (0)'. Under DETAILS, there are sections for ACTIVITY and CHATTER. The ACTIVITY section includes a 'Email' button and a 'Compose' button. The CHATTER section has a text input field 'Write an email...' and a 'Compose' button. A yellow box highlights the 'Edit' and 'Delete' buttons at the top right of the page. The bottom of the slide features a red progress bar with video controls (back, forward, volume, etc.) and a timestamp '6:08 / 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



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

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

Search Salesforce

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards More

CONTACT
Abby Anderson

+ Follow Send Email Edit Delete

Title Account Name Phone(2) Email
Arbuckle Laboratories 1-847-555-0590 abby.anderson@trainingorg.arbucklelaboratories.com

Contact Owner Phyllis... 

CONTACT
Ms. John Ortaga

+ Follow Send Email Edit Delete

Title Account Name Phone(2) Email
Vice President Cable Inc. (415) 555-1212 jortaga@cable.com

Contact Owner Karen... 

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

The screenshot shows the Salesforce interface. At the top, there's a navigation bar with icons for Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, and More. Below this is a search bar labeled "Search Salesforce". The main area displays two sections: "CONTACTS All Contacts" and "OPPORTUNITIES All Opportunities".

CONTACTS All Contacts

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

OPPORTUNITIES All Opportunities

	Opportunity	Lead	Stage	Amount	Close Date	Owner
1	Arbuckle Laborato...	Abby Anderson	Potential	\$100,000	2024-01-15	John Ortaga
2	Cable Inc.	John Ortaga	Potential	\$100,000	2024-01-15	Karen Williams

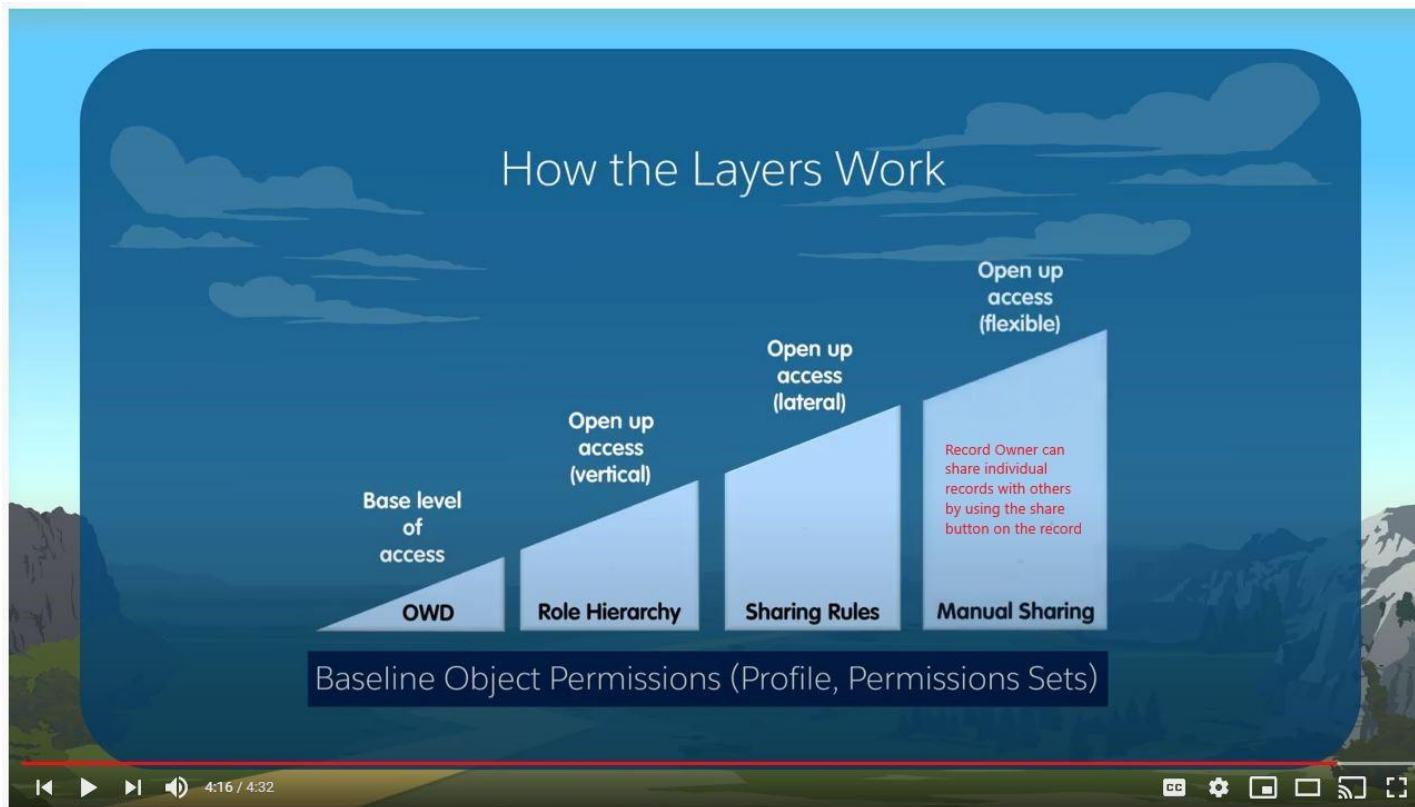
How Do the Layers Work?

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

A screenshot of a Microsoft Contacts list titled "All Contacts". The top navigation bar includes "CONTACTS", "All Contacts", a search bar, and buttons for "No Edit or Delete" (highlighted with a yellow box) and "New". Below the header is a table with columns: NAME, ACCOUNT..., TITLE, POSITION, PHONE, EMAIL, and CONTACT... . Four contacts are listed:

	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





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



View & Edit

The role can edit, regardless of who owns it.

View Only

The role can view it, regardless of who owns it.

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 i
This role reports to	US Sales Manager 🔍
Role Name as displayed on reports	US Sales Rep
Opportunity Access	<input checked="" type="radio"/> Users in this role cannot access opportunities that they do not own that are associated with accounts that they do own <input type="radio"/> Users in this role can view all opportunities associated with accounts that they own, regardless of who owns the opportunities <input type="radio"/> Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities
Case Access	<input type="radio"/> Users in this role cannot access cases that they do not own that are associated with accounts that they do own <input checked="" type="radio"/> Users in this role can view all cases associated with accounts that they own, regardless of who owns the cases <input checked="" type="radio"/> Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases

[Save](#) [Save & New](#) [Cancel](#)



Role Edit

US Sales Manager

Role Edit

Label Role Name This role reports to 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

SETUP Roles

Role Edit New Role

Role Edit

Label	Sales Ops
Role Name	Sales_Ops
This role reports to	VP of Global Sales
Role Name as displayed on reports	
Opportunity Access	<input type="radio"/> Users in this role cannot access opportunities that they do not own that are associated with accounts that they do own <input type="radio"/> Users in this role can view all opportunities associated with accounts that they own, regardless of who owns the opportunities <input checked="" type="radio"/> Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities
Case Access	<input type="radio"/> Users in this role cannot access cases that they do not own that are associated with accounts that they do own <input checked="" type="radio"/> Users in this role can view all cases associated with accounts that they own, regardless of who owns the cases <input type="radio"/> 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

Sales Ops

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](#) 

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**   [Users in Sales Ops Role Help](#) 

No records to display

 SETUP
Roles

Sales Ops

The users shown in the **Selected Users** list are currently assigned to the role **Sales Ops**.

To assign other users to this role:

- Make a selection from the drop-down list to show available users.
- Choose a user on the left and add them to the **Selected Users** list.

Removing a user from the **Selected Users** list deletes the role assignment for that user.

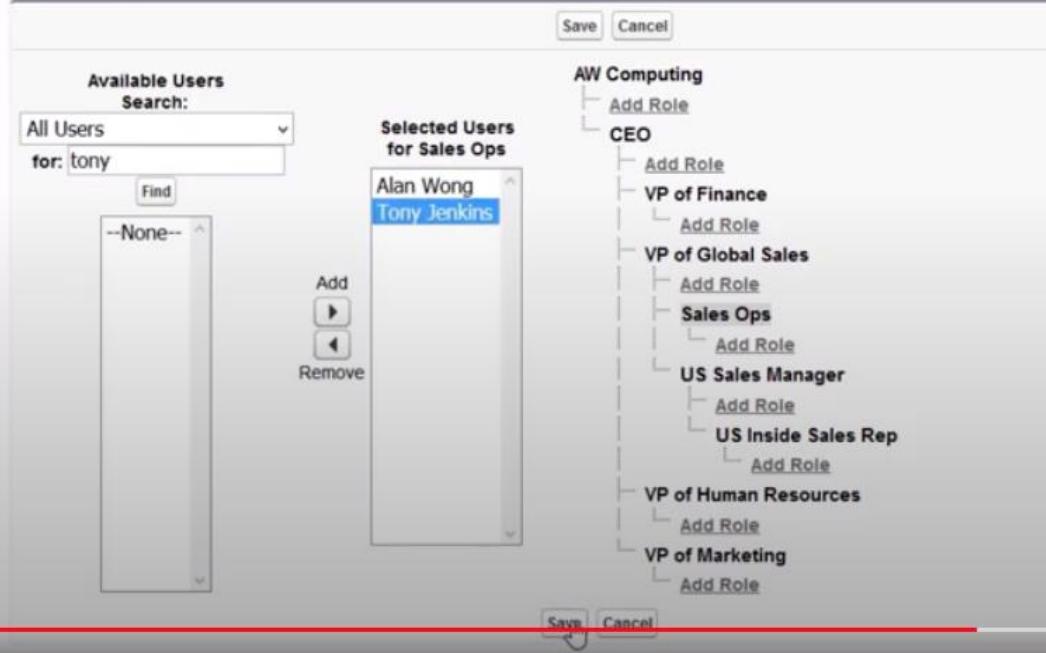
Available Users
Search:
All Users for: tony
Find
--None--
Add Remove

Selected Users for Sales Ops
Alan Wong Tony Jenkins

AW Computing

- Add Role
- CEO
 - Add Role
- VP of Finance
 - Add Role
- VP of Global Sales
 - Add Role
- Sales Ops
 - Add Role
- US Sales Manager
 - Add Role
 - US Inside Sales Rep
 - Add Role
- VP of Human Resources
 - Add Role
- VP of Marketing
 - Add Role

Save Cancel



Assign users to Role

 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](#)
 - ⊖ Sales Ops [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](#)

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:

Access at AW So Far

PROFILES

Operations (custom)
Managers (custom)
Inside Sales Rep (custom)
Call Center Rep (custom)

ORG-WIDE DEFAULTS

Accounts: Public Read Only
Contacts: Public Read Write
Opportunities: Private
Cases: Private

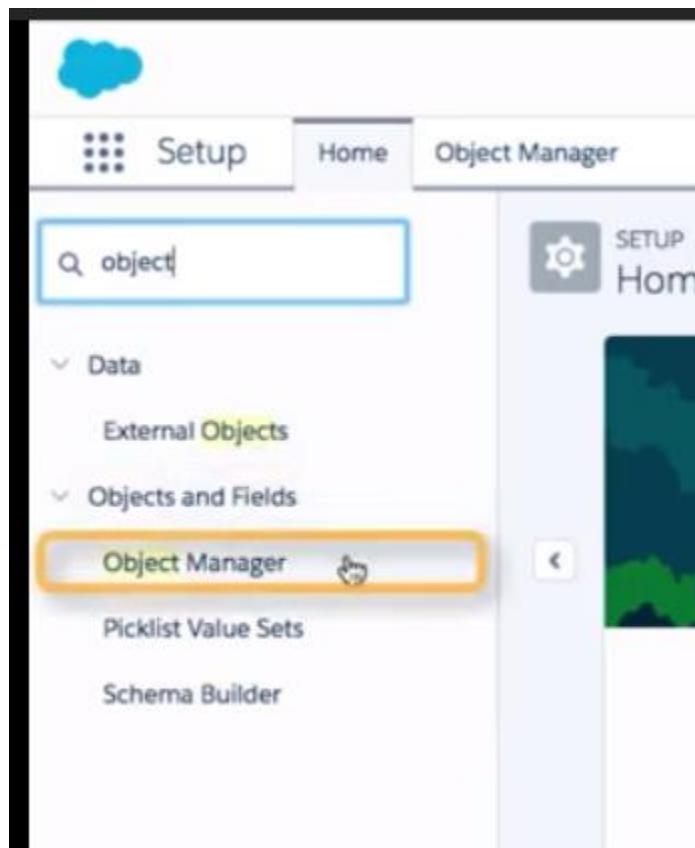
ROLE HIERARCHY

```
graph TD; SO[Sales Operations] --> SM[Sales Managers]; SM --> SR[Sales Reps]
```

Sales Operations
↓
Sales Managers
↓
Sales Reps

05 Field Level Security





The screenshot shows the Salesforce Object Manager interface. At the top, there is a navigation bar with icons for Setup, Home, and Object Manager. Below this, a breadcrumb trail indicates the path: SETUP > OBJECT MANAGER. The main title is "Opportunity". On the left, a sidebar lists various configuration options: Details, Fields & Relationships (which is highlighted with an orange box), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Object Limits, Record Types, Related Lookup Filters, Search Layouts, Triggers, and Validation Rules. The main content area is titled "Details" and contains the following fields and their values:

Description	
API Name	Opportunity
Custom	
Singular Label	Opportunity
Plural Label	Opportunities



Setup Home Object Manager ▾

SETUP > OBJECT MANAGER Opportunity

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

Opportunity Custom Field
Commission

[Back to Opportunity Fields](#)

Custom Field Definition Detail

[Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#)



Field Information

Field Label	Commission	Object Name	Opportunity
Field Name	Commission		
API Name	Commission__c		
Description	Calculates sales rep commission of 10 percent		
Help Text	Sales rep commission		
Created By	Admin User , 5/24/2017 2:34 PM	Modified By	Admin User , 5/24/2017 2:53 PM

Formula Options

Data Type	Formula
Decimal Places	2

Amount * 0.1

Click <Set Field-Level Security>.

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

Set Field-Level Security
Commission

Help for this Page 

Field Label	Commission	Save	Cancel
Data Type	Formula (Currency)		
Field-Level Security for Profile			
		Visible	Read-Only
Accounts Receivable User		<input checked="" type="checkbox"/>	✓
Call Center Rep		<input checked="" type="checkbox"/>	✓
Consulting User		<input checked="" type="checkbox"/>	✓
Contract Manager		<input checked="" type="checkbox"/>	✓
Executive User		<input checked="" type="checkbox"/>	✓
General Marketing User		<input checked="" type="checkbox"/>	✓
Inside Sales Rep		<input checked="" type="checkbox"/>	✓
Marketing User		<input checked="" type="checkbox"/>	✓
No Access Profile		<input checked="" type="checkbox"/>	✓
Outside Sales Rep		<input checked="" type="checkbox"/>	✓
Read Only		<input checked="" type="checkbox"/>	✓
Sales Rep		<input checked="" type="checkbox"/>	✓
Sales User		<input checked="" type="checkbox"/>	✓
Solution Manager		<input checked="" type="checkbox"/>	✓
Standard User		<input checked="" type="checkbox"/>	✓
Support User		<input checked="" type="checkbox"/>	✓
System Administrator		<input checked="" type="checkbox"/>	✓
VAR User		<input checked="" type="checkbox"/>	✓

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.

Set Field-Level Security
Commission

Help for this Page 

Field Label	Commission	Save	Cancel
Data Type	Formula (Currency)		
Field-Level Security for Profile			
Profile	Visible	Read-Only	
Accounts Receivable User	<input checked="" type="checkbox"/>	✓	
Call Center Rep	<input checked="" type="checkbox"/>	✓	
Consulting User	<input checked="" type="checkbox"/>	✓	
Contract Manager	<input checked="" type="checkbox"/>	✓	
Executive User	<input checked="" type="checkbox"/>	✓	
General Marketing User	<input checked="" type="checkbox"/>	✓	
Inside Sales Rep	<input checked="" type="checkbox"/>	✓	
Marketing User	<input checked="" type="checkbox"/>	✓	
No Access Profile	<input checked="" type="checkbox"/>	✓	
Outside Sales Rep	<input checked="" type="checkbox"/>	✓	
Read Only	<input checked="" type="checkbox"/>	✓	
Sales Rep	<input checked="" type="checkbox"/>	✓	
Sales User	<input checked="" type="checkbox"/>	✓	
Solution Manager	<input checked="" type="checkbox"/>	✓	
Standard User	<input checked="" type="checkbox"/>	✓	
Support User	<input checked="" type="checkbox"/>	✓	
System Administrator	<input checked="" type="checkbox"/>	✓	
VAR User	<input checked="" type="checkbox"/>	✓	

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:

Set Field-Level Security
Commission

Field Label: Commission
Data Type: Formula (Currency)

Save Cancel

Field-Level Security for Profile	Visible	Read-Only
Accounts Receivable User	<input type="checkbox"/>	✓
Call Center Rep	<input type="checkbox"/>	✓
Consulting User	<input type="checkbox"/>	✓
Contract Manager	<input checked="" type="checkbox"/>	✓
Executive User	<input type="checkbox"/>	✓
General Marketing User	<input type="checkbox"/>	✓
Inside Sales Rep	<input checked="" type="checkbox"/>	✓
Marketing User	<input type="checkbox"/>	✓
No Access Profile	<input type="checkbox"/>	✓
Outside Sales Rep	<input type="checkbox"/>	✓
Read Only	<input type="checkbox"/>	✓
Sales Rep	<input checked="" type="checkbox"/>	✓
Sales User	<input type="checkbox"/>	✓
Solution Manager	<input checked="" type="checkbox"/>	✓
Standard User	<input type="checkbox"/>	✓
Support User	<input type="checkbox"/>	✓
System Administrator	<input checked="" type="checkbox"/>	✓
VAR User	<input type="checkbox"/>	✓

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	
			Hidden
CRED	Private	View + Edit	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:

The screenshot shows the ServiceNow interface for managing field accessibility. On the left, a sidebar menu is open under the 'Security' category. The 'Field Accessibility' option is highlighted with a blue selection bar. The main content area is titled 'Field Accessibility' and contains the following text: 'Choose the type of record for which you would like to view field accessibility.' Below this is a list titled 'Select one:' followed by a long list of record types, many of which are underlined, suggesting they are links:

- Account
- Address
- Alternative Payment Method
- API Anomaly Event Store
- Asset
- Asset Action
- Asset Action Source
- Asset Relationship
- Asset State Period
- Associated Location
- Authorization Form
- Authorization Form Consent
- Authorization Form Data Use
- Authorization Form Text
- Badge
- Badge Received
- Campaign
- Campaign Member
- Card Payment Method
- Case
- Coaching
- Communication Subscription
- Communication Subscription Channel Type
- Communication Subscription Consent
- Communication Subscription Timing
- Consumption Rate
- Consumption Schedule
- Contact

Setup Home Object Manager ▾

Q Security

Security

- Activations
- CORS
- CSP Trusted Sites
- Certificate and Key Management
- Delegated Administration

Event Monitoring

- Event Monitoring Settings
- Transaction Security Policies
- Expire All Passwords

Field Accessibility

- File Upload and Download
- Security
- Health Check
- Login Access Policies
- Named Credentials
- Network Access
- Outbound Connection Settings
- Password Policies

Platform Encryption

- Advanced Settings
- Key Management
- Private Connect
- Remote Site Settings
- Security Alerts
- Session Management
- Session Settings
- Sharing Settings

SETUP Field Accessibility

Opportunity

This page allows you to view Opportunity field accessibility for the following profiles.

[Choose a different tab](#)

Choose your view

[View by Fields](#)
Use this option to choose a field and view a table of field accessibility for different profiles and record types.

[View by Profiles Current View](#)
Choose a profile to view a table of field accessibility for different record types.

Profile:

Field accessibility for Profile: Field Sales User

Click on a cell in the table below to change the field's 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

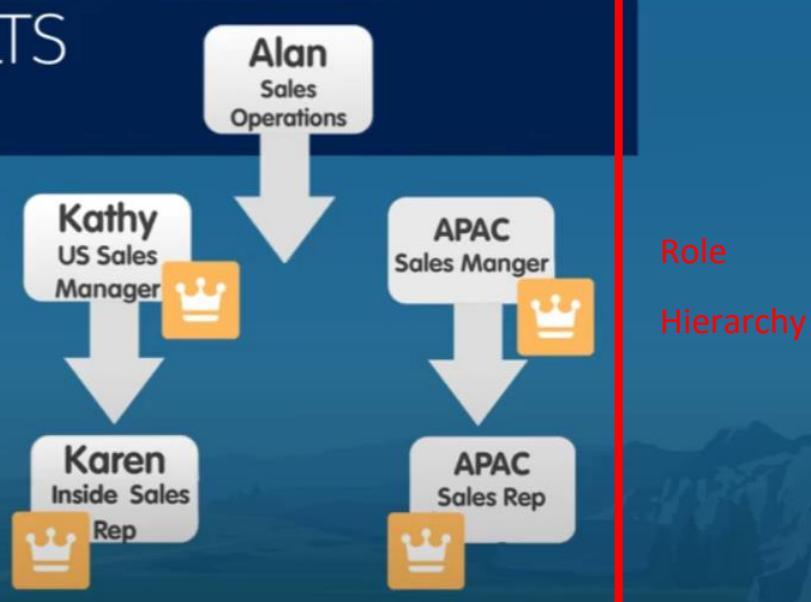


Implementing Sharing Rules to open record access up to users when the Org-Wide Defaults are more restrictive than Public Read/Write.

Record Access at AW Computing

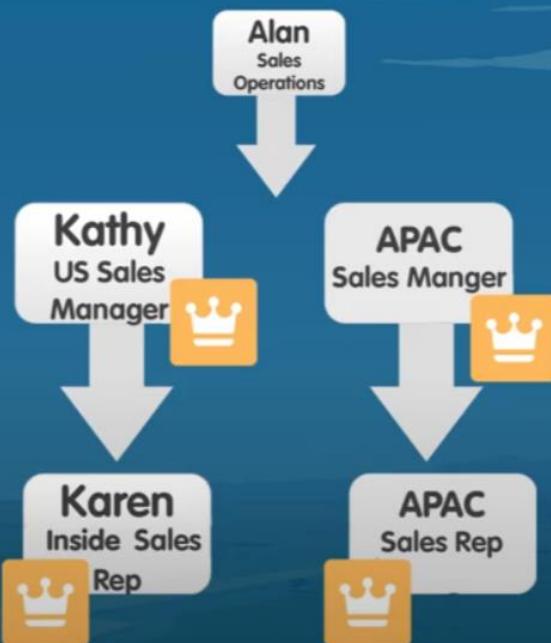
ORG-WIDE DEFAULTS Opportunities: Private

Private - Only the person that owns the record can see it.

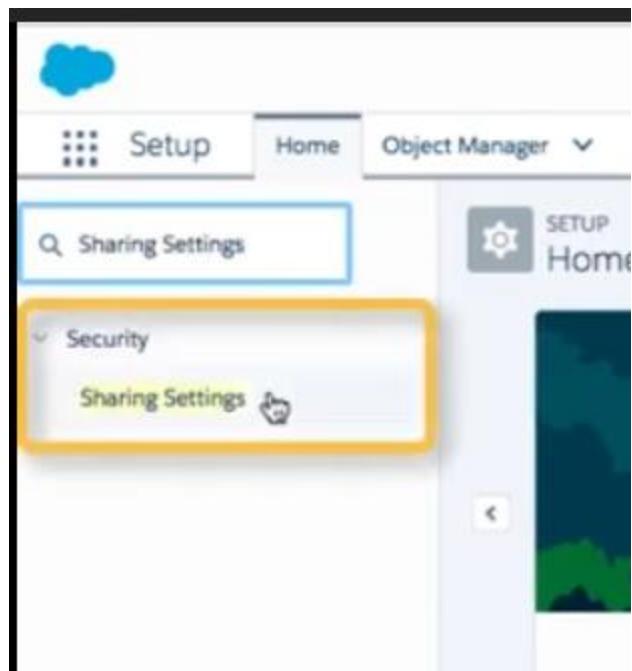


Role Hierarchy allowed to open record access vertically.

Sharing Rules



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

Sharing Settings

Sharing Settings

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

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

Manager Groups

Help for this Page

Organization-Wide Defaults Help

Other Settings Help

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

The screenshot shows the 'Sharing Settings' page under the 'SETUP' tab. The page is divided into several sections:

- Social Post**: Shows sharing settings for Social Post, Streaming Channel, User Provisioning Request, Applicant, Interviewer, Job Application, and Position. Most are set to Private or Public Read/Write, with some controlled by Parent.
- Other Settings**: Includes a 'Manager Groups' section with a help link.
- Sharing Rules**: A summary section with links to Lead, Account, Contact, Opportunity, Case, Campaign, and User sharing rules.
- Lead Sharing Rules**: Shows 'No sharing rules specified.' with 'New' and 'Recalculate' buttons.
- Account Sharing Rules**: Shows 'No sharing rules specified.' with 'New' and 'Recalculate' buttons.
- Contact Sharing Rules**: Shows 'No sharing rules specified.' with 'New' and 'Recalculate' buttons.
- Opportunity Sharing Rules**: This section is highlighted with a yellow border. It shows 'No sharing rules specified.' with 'New' and 'Recalculate' buttons. A cursor is hovering over the 'New' button.
- Case Sharing Rules**: Shows 'No sharing rules specified.' with 'New' and 'Recalculate' buttons.
- Campaign Sharing Rules**: Shows 'No sharing rules specified.' with 'New' and 'Recalculate' buttons.
- User Sharing Rules**: Shows 'No sharing rules specified.' with 'New' and 'Recalculate' buttons.

At the bottom left, it says '1:56 / 4:32'. On the right side, there are 'User Sharing Rules Help' and a gear icon.

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

SETUP
Sharing Settings

Setup
Opportunity Sharing Rule

Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.

Note: "Roles and subordinates" includes all users in a role, and the roles below that role.

You can use sharing rules only to grant wider access to data, not to restrict access.

Step 1: Rule Name

Label	US Shares to APAC M
Rule Name	US_Shares_to_APAC_M
Description	[Empty]

Step 2: Select your rule type

Rule Type Based on record owner Based on criteria

Step 3: Select which records to be shared

Opportunity: owned by members of

Step 4: Select the users to share with

Share with

Step 5: Select the level of access for the users

Opportunity Access

Save **Cancel**

Based on Record Ownership

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

The screenshot shows the 'Opportunity Sharing Rule' configuration screen in Salesforce Setup. The rule is named 'APAC Shares to US M'.

Step 1: Rule Name

- Label: APAC Shares to US M
- Rule Name: APAC_Shares_to_US_M
- Description: (empty)

Step 2: Select your rule type

- Rule Type: Based on record owner (radio button selected)
- Based on criteria (radio button unselected)

Step 3: Select which records to be shared

- Opportunity: owned by members of: Roles and Subordinates (selected) → APAC Sales Manager

Step 4: Select the users to share with

- Share with: Roles (selected) → US Sales Manager

Step 5: Select the level of access for the users

- Opportunity Access: Read Only

Buttons at the bottom: Save (highlighted with a blue border), Cancel

Based on Record Ownership

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

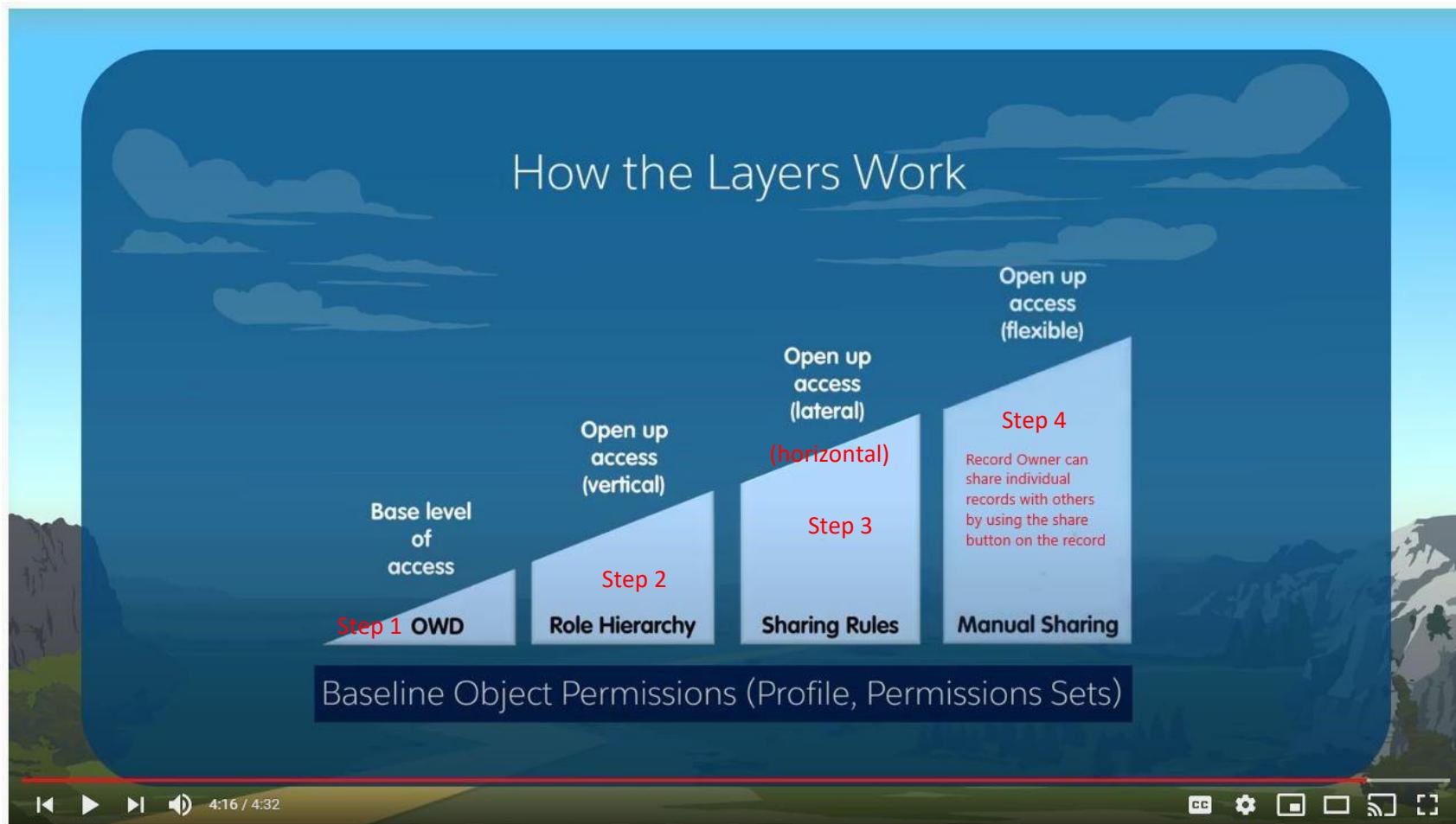
The screenshot shows the 'Opportunity Sharing Rule' configuration interface in Salesforce. The steps are as follows:

- Step 1: Rule Name**
 - Label: Won Opplys Shared w
 - Rule Name: Won_Opplys_Shared_1
 - Description: (empty)
- Step 2: Select your rule type**
 - Rule Type: Based on criteria (radio button selected)
- Step 3: Select which records to be shared**

Criteria	Field	Operator	Value	Logic
1	Won	equals	True	AND
2	--None--	--None--	--None--	AND
3	--None--	--None--	--None--	AND
4	--None--	--None--	--None--	AND
5	--None--	--None--	--None--	AND

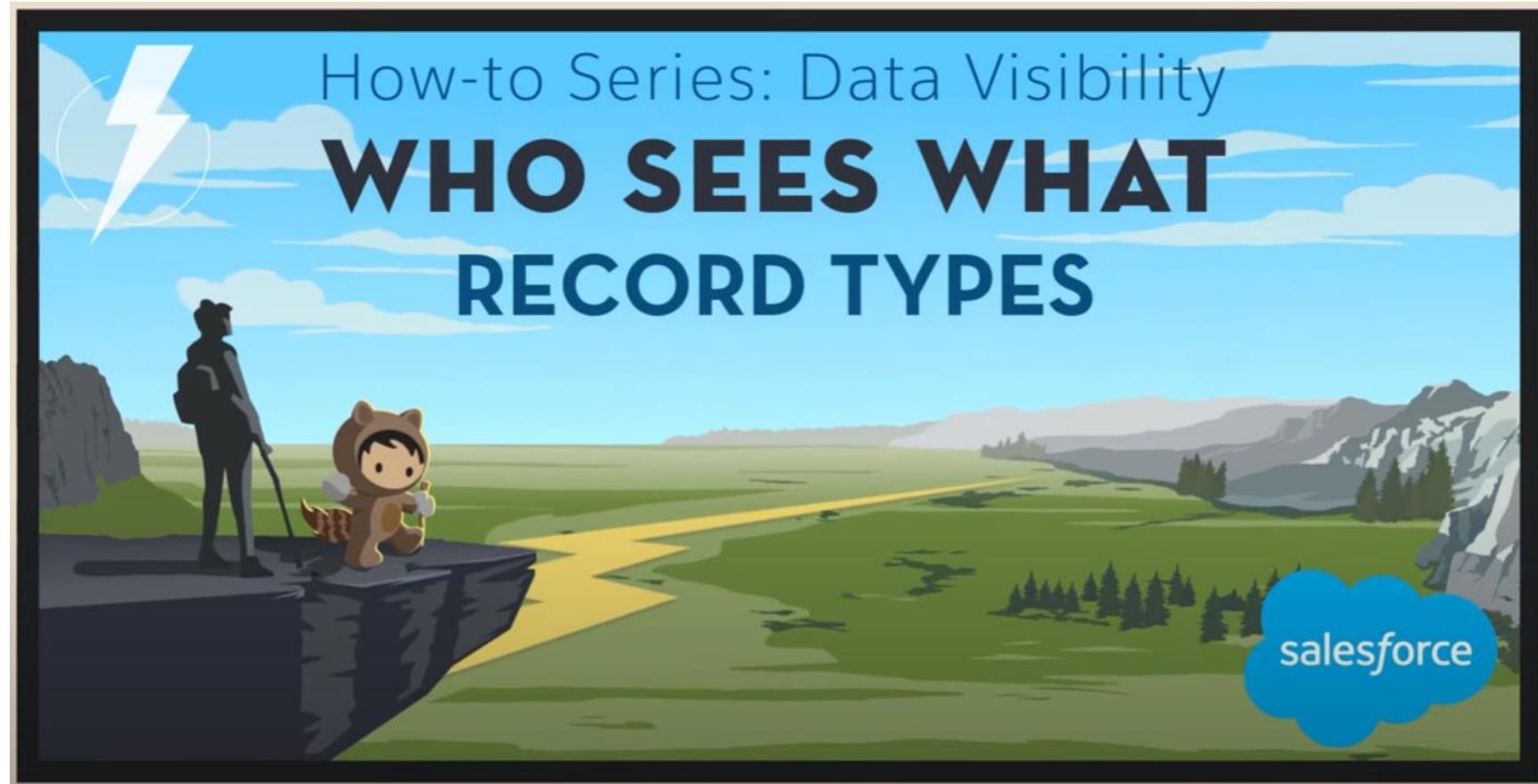
Add Filter Logic...
- Step 4: Select the users to share with**
 - Share with: Roles and Subordinates: Finance Director
- Step 5: Select the level of access for the users**
 - Opportunity Access: Read Only

Buttons at the bottom: Save (with a checkmark icon) and Cancel.



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

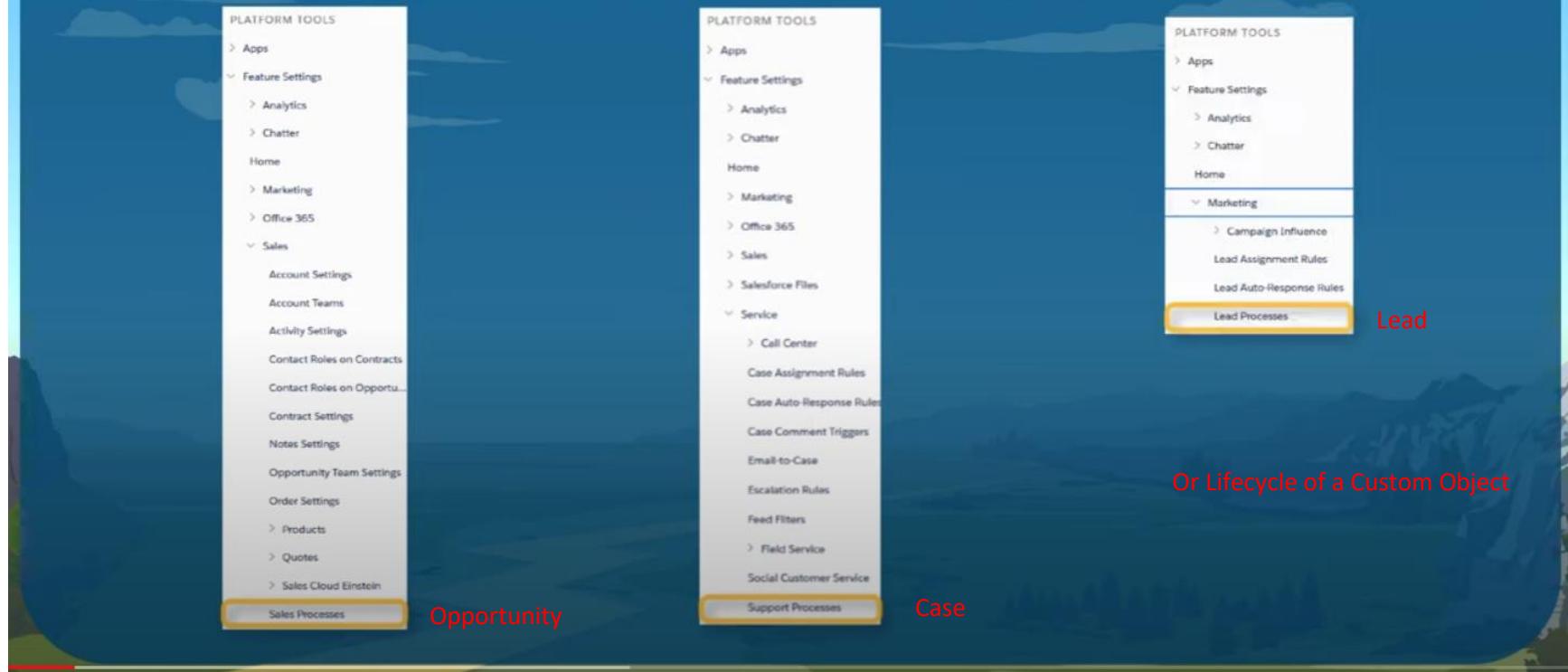
1. Access to Records a USER does NOT own are set by OWD.
2. If defaults are anything less than Public Read/Write, you can open access back up to certain Roles by using the Role Hierarchy.
3. Further open access by using Sharing Rules.
4. Record Owner can share individual records with others by using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



Record Types Control:

- Business Processes
- Page Layouts
- Picklist Values

Business Processes



Page Layouts

Create Case: Internal Cases

Employee ID

Location

--None--

Type

--None--

* Status

New

Case Origin

--None--

Priority

Medium

Select and organize groups of fields related to an Object.

Picklist Values

Problem
Feature Request
Question
HR
Payroll
Finance
IT
Hardware
Software
Service Contract

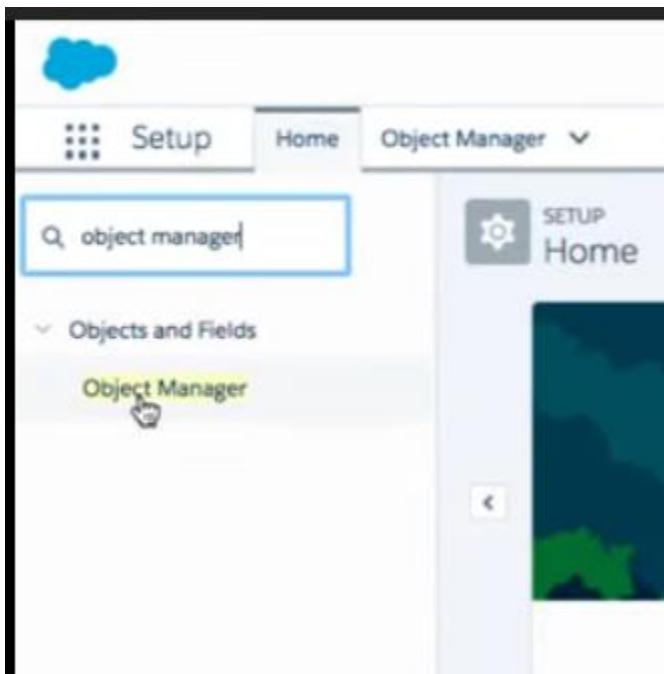
Internal
HR Payroll
Finance
IT

External
Feature Request
Hardware
Software
Service Contract

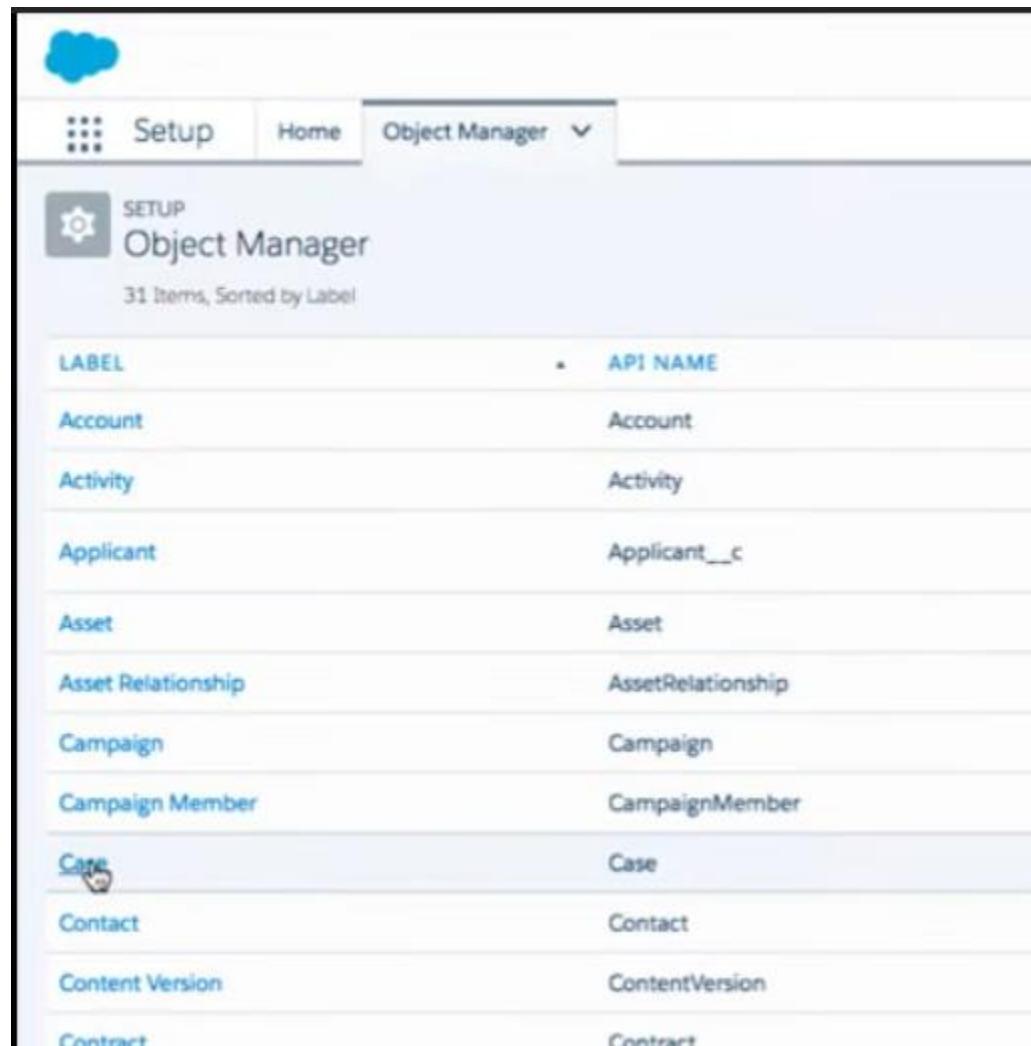
1. Define Master List with all possible choices.
2. Use Record Types to display a subset depending upon the situation.

Problem: Creating Internal and External business process for Case Object

Start with Object Manager:



Click on Case Object:



The screenshot shows the Salesforce Object Manager page. At the top, there is a navigation bar with icons for Setup, Home, and Object Manager. Below the navigation bar, the title "Object Manager" is displayed, followed by "SETUP" and a gear icon. The page displays a list of 31 objects, sorted by Label. The columns are labeled "LABEL" and "API NAME". The "Case" object is highlighted with a yellow background and a hand cursor icon pointing at its label. Other objects listed include Account, Activity, Applicant, Asset, Asset Relationship, Campaign, Campaign Member, Contact, Content Version, and Contract.

LABEL	API NAME
Account	Account
Activity	Activity
Applicant	Applicant__c
Asset	Asset
Asset Relationship	AssetRelationship
Campaign	Campaign
Campaign Member	CampaignMember
Case	Case
Contact	Contact
Content Version	ContentVersion
Contract	Contract

Click on Fields & Relationships:

The screenshot shows the Salesforce Object Manager interface. At the top, there is a navigation bar with a cloud icon, 'Setup', 'Home', and 'Object Manager'. Below this, a breadcrumb trail shows 'SETUP > OBJECT MANAGER' and the object name 'Case'. On the left, a sidebar menu lists various configuration options: Details, Fields & Relationships (which has a mouse cursor hovering over it), 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, and Validation Rules. The main content area is titled 'Details' and contains fields for Description (empty), API Name (Case), Singular Label (Case), and Plural Label (Cases).

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

The screenshot shows the Salesforce Object Manager interface for the Case object. The left sidebar lists various setup options like Case Page Layouts, Case Close Page Layouts, Lightning Record Pages, etc. The main content area is titled 'Case Field Status' and shows the 'Case Status Picklist Values' section. It includes tabs for 'Field Information', 'Field Dependencies', 'Validation Rules', and 'Case Status Picklist Values'. The 'Case Status Picklist Values' tab displays a table with columns: Action, Values, API Name, Closed, Default, Chart Colors, and Modified By. The table contains the following data:

Action	Values	API Name	Closed	Default	Chart Colors	Modified By
Edit Deactivate	New	New	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Assigned dynamically	Admin User, 5/19/2017 1:38 PM
Edit Del Deactivate	Working	Working	<input type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	Admin User, 5/19/2017 1:38 PM
Edit Del Deactivate	Escalated	Escalated	<input type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	Admin User, 5/19/2017 1:38 PM
Edit Del Deactivate	Bug Logged	Bug Logged	<input type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	Admin User, 5/19/2017 1:38 PM
Edit Del Deactivate	Bug Fixed	Bug Fixed	<input type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	Admin User, 5/19/2017 1:38 PM
Edit Del Deactivate	Closed	Closed	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	Admin User, 5/19/2017 1:38 PM
Edit Del Deactivate	On Hold	On Hold	<input type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	Admin User, 5/19/2017 1:38 PM

Below this table is another section titled 'Inactive Values' with a single row:

Action	Values	API Name	Closed	Modified By
Del Activate	1	1	<input type="checkbox"/>	Admin User, 5/19/2017 1:38 PM

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

The screenshot shows the Salesforce Setup interface. The left sidebar includes links for 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), and Settings. The main content area is titled "Add Picklist Values" under "Case Status". It contains instructions: "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." Below this, two notes explain what happens if a value matches an inactive value's API name or label. A text input field contains "Pending Department Approval" and "Waiting for IT Approval". At the bottom, a section titled "To add the new value to the picklist values for a particular Support Process, check the appropriate boxes below." lists "Support Processes" and "Product Support Process" with their descriptions. Buttons for "Save" and "Cancel" are at the bottom right.

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.

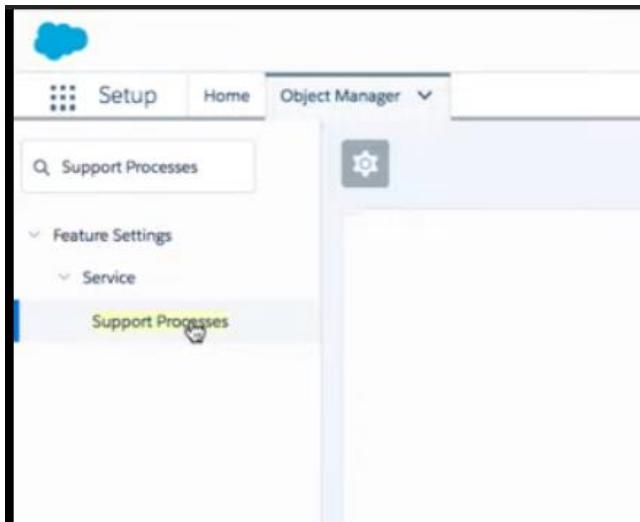
Pending Department Approval
Waiting for IT Approval

To add the new value to the picklist values for a particular Support Process, check the appropriate boxes below.

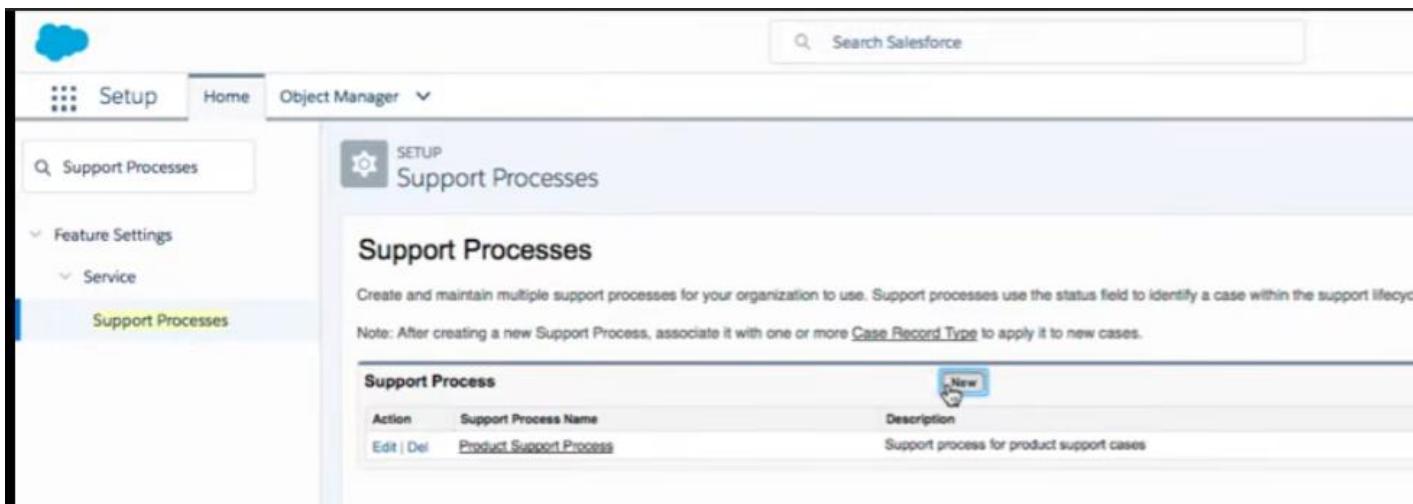
	Description
<input type="checkbox"/> Support Processes	Support process for product support cases
<input type="checkbox"/> Product Support Process	

Save 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:

Support Process Edit

New Support Process

Enter a name and description for the Support Process. Select an existing Support Process to copy the picklist values to the new process. Sele

Support Process	
Existing Support Process	--Master--
Support Process Name	Internal
Description	Status Field Values for Internal Case Process

Step 2:

Support Process
Internal

Select a value from the Available Values list and add it to the Selected Values list to be included in the support process. Note that removing a status from the support process will not remove the value from any records already containing the status.

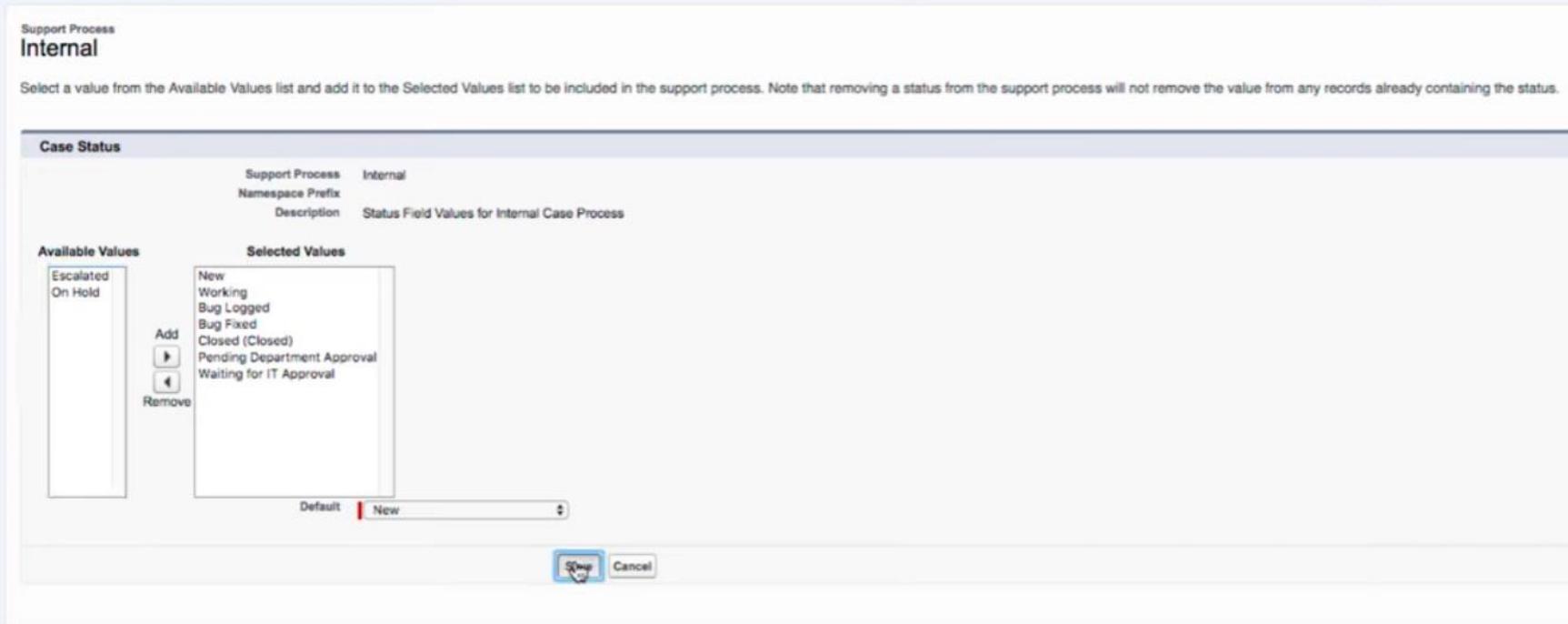
Case Status

Support Process Internal
Namespace Prefix
Description Status Field Values for Internal Case Process

Available Values	Selected Values
Escalated On Hold	New Working Bug Logged Bug Fixed Closed (Closed) Pending Department Approval Waiting for IT Approval

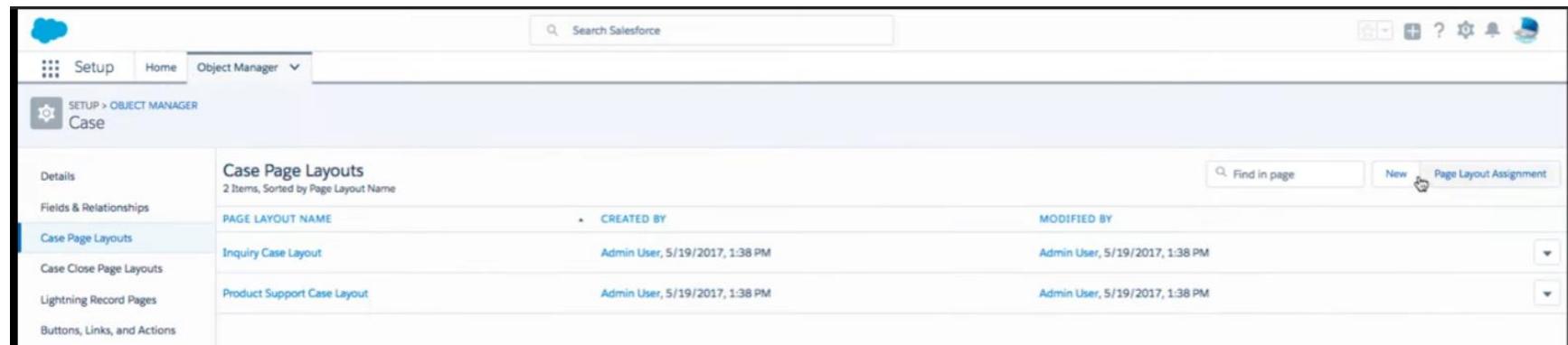
Add Remove

Default | New



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

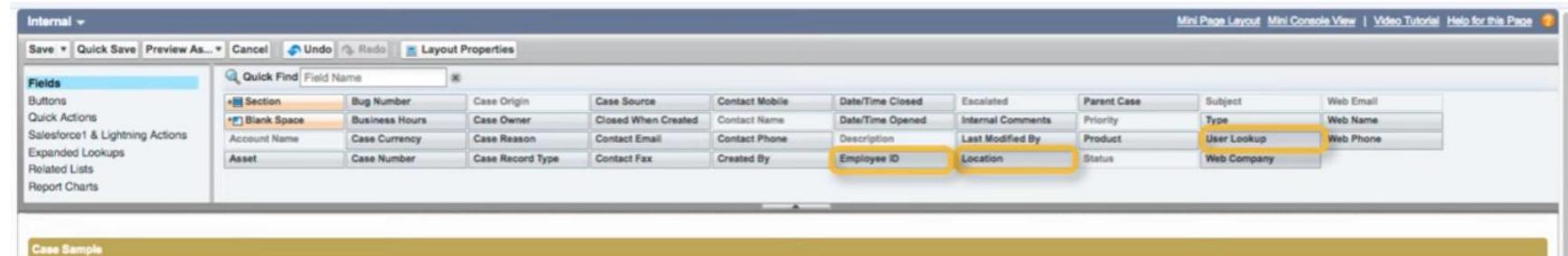
Next is page layouts to be modified for each process:



The screenshot shows the Salesforce Object Manager interface for the 'Case' object. The left sidebar has a 'Case Page Layouts' section selected. The main area displays two page layouts: 'Inquiry Case Layout' and 'Product Support Case Layout'. Each layout is shown with its name, created by ('Admin User, 5/19/2017, 1:38 PM'), and modified by ('Admin User, 5/19/2017, 1:38 PM'). A 'New' button and a 'Page Layout Assignment' link are visible at the top right.

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.



The screenshot shows the 'Layout Properties' screen for a 'Case' layout. The left sidebar lists various layout components like Buttons, Quick Actions, and Fields. The main area shows a grid of fields with several custom fields highlighted by yellow boxes: 'Employee ID', 'Location', and 'User Lookup'. The 'User Lookup' field is specifically highlighted with a thicker yellow border.

Create New Page Layout – Internal First

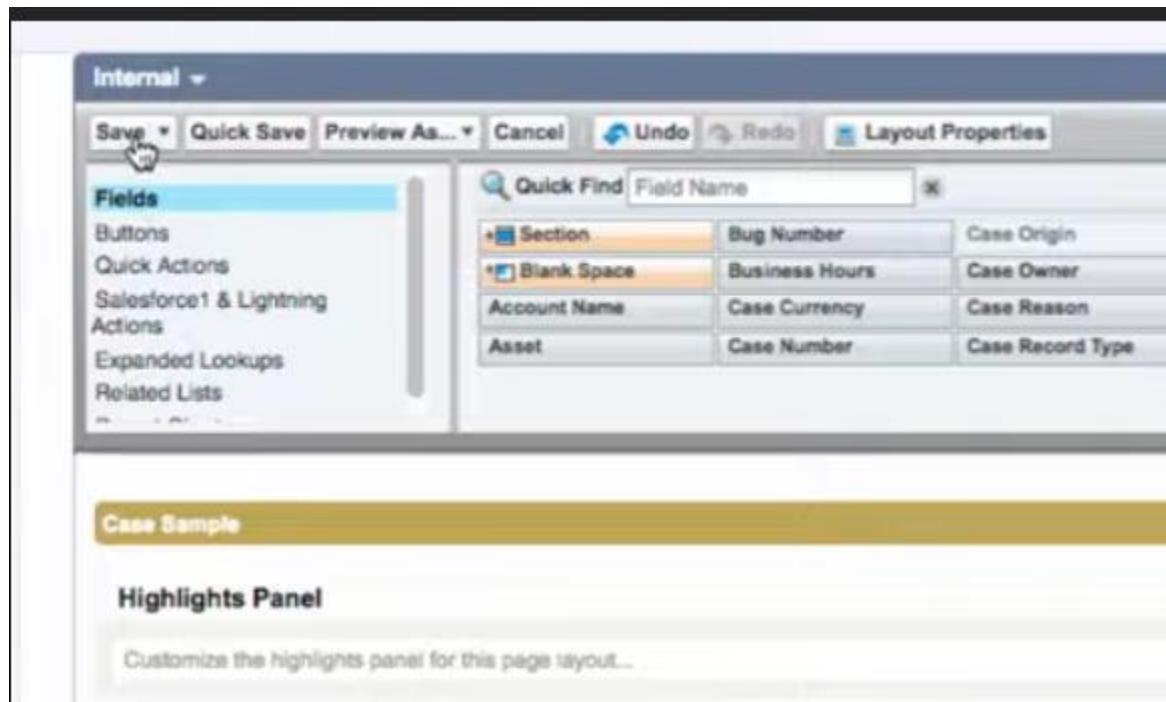
The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar. Below the navigation is a breadcrumb trail: 'SETUP > OBJECT MANAGER > Case'. On the left, a sidebar lists various layout types: 'Details', 'Fields & Relationships', 'Case Page Layouts' (which is selected and highlighted in blue), 'Case Close Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', and 'Compact Layouts'. The main content area is titled 'Create New Page Layout'. It contains a note: 'As an option, you may select an existing layout to clone. If you create a page layout without cloning, your page layout will not include the standard sections whose names are translated for your international users.' Below this is a form with fields: 'Existing Page Layout' (dropdown menu showing 'None'), 'Page Layout Name' (text input field containing 'Internal' which is highlighted with a red box), and 'Feed-Based Layout' (checkbox). At the bottom right of the form are 'Save' and 'Cancel' buttons.

Editing page layout:

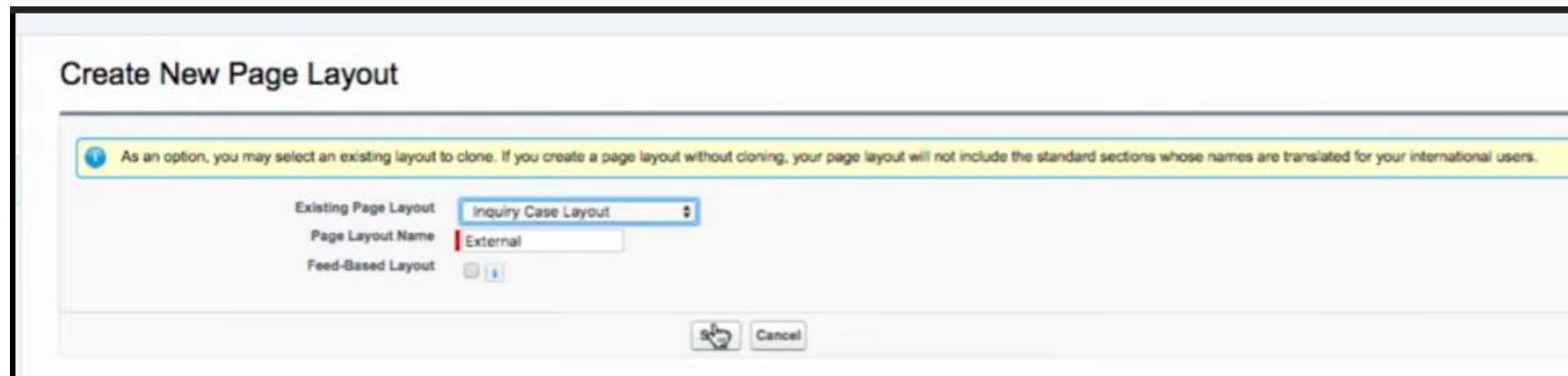
1. Add Fields you need
2. Remove fields you do not need
3. For Fields you cannot remove – Add a new section, and place special field in this section. This is so that the field in question is out of the way.

Note: At this point, Record Type does not exist – Once Record Type is selected, 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.

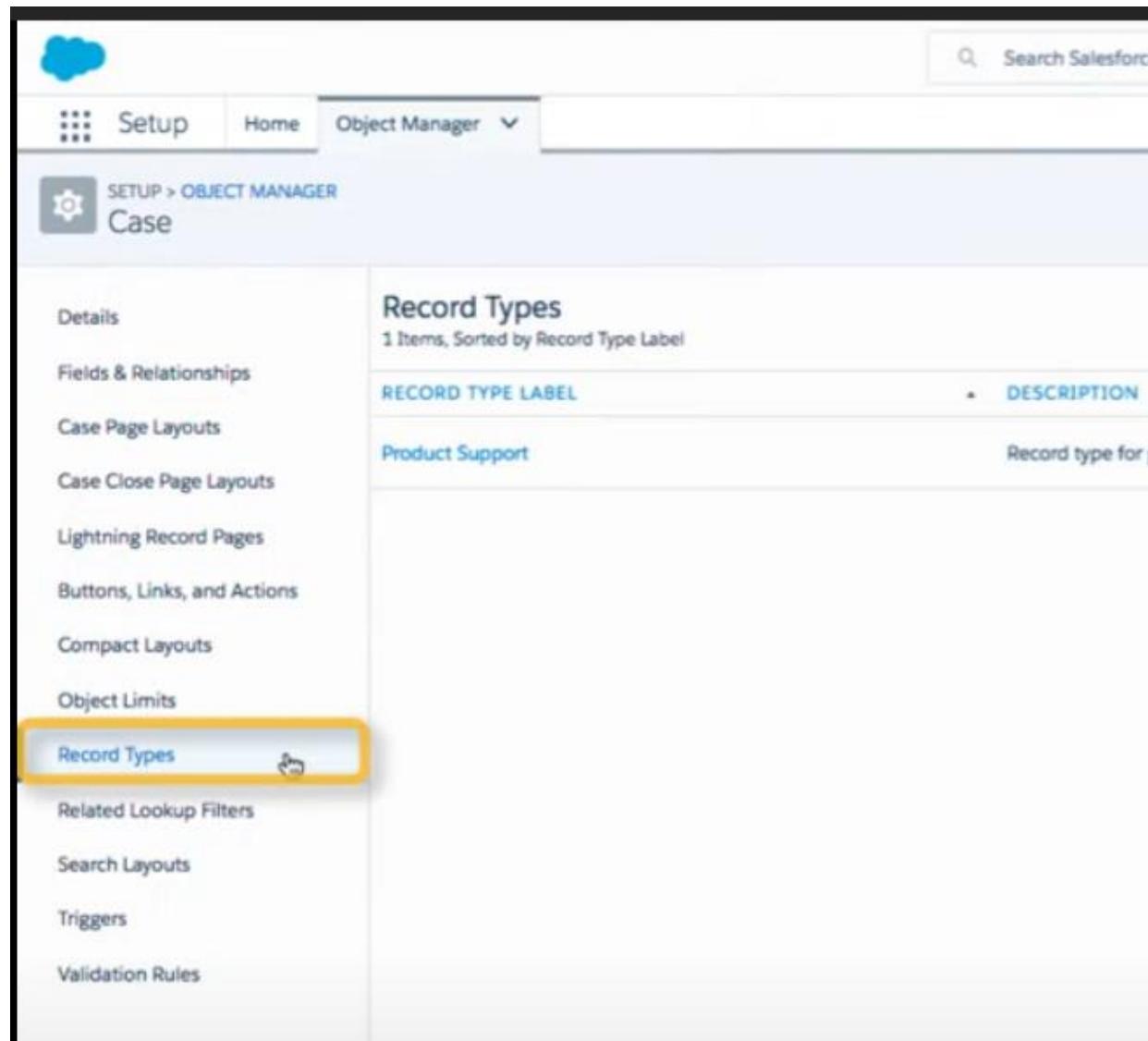
Save the Internal Page Layout:



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



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



The screenshot shows the Salesforce Object Manager interface for the 'Case' object. The top navigation bar includes the Salesforce logo, a search bar labeled 'Search Salesforce', and tabs for 'Setup', 'Home', and 'Object Manager'. The 'Object Manager' tab is active, showing 'SETUP > OBJECT MANAGER' and 'Case'. On the left, a sidebar lists various setup options: Details, Fields & Relationships, Case Page Layouts, Case Close Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Object Limits, Record Types (which is selected and highlighted with a yellow box), Related Lookup Filters, Search Layouts, Triggers, and Validation Rules. The main content area is titled 'Record Types' and displays one item: 'Product Support' with the description 'Record type for p...'. A table header with columns 'RECORD TYPE LABEL' and 'DESCRIPTION' is visible.

RECORD TYPE LABEL	DESCRIPTION
Product Support	Record type for p...

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.

The screenshot shows the Salesforce Object Manager interface for creating a new Record Type. The left sidebar navigation bar includes links for Setup, Home, Object Manager, Details, Fields & Relationships, Case Page Layouts, Case Close Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Object Limits, Record Types (which is selected), Related Lookup Filters, Search Layouts, Triggers, and Validation Rules. The main content area is titled "New Record Type Case" and "Step 1. Enter the details". It contains fields for Record Type (Existing Record Type set to "Master"), Record Type Label ("Internal"), Record Type Name ("Internal"), Support Process ("Internal"), Description ("To be used when creating internal cases"), and Active status (checkbox checked). Below this, a table lists profiles and their record types, with checkboxes for "Enable for Profile" and "Make Default".

Profile Name	Record Types Currently Available	Enable for Profile	Make Default
Accounts Receivable User	Product Support (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Call Center Rep	Product Support (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Consulting User	Product Support (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Contract Manager	Product Support (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Executive User	Product Support (Default)	<input type="checkbox"/>	<input type="checkbox"/>
General Marketing User	Product Support (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Inside Sales Rep	Product Support (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Marketing User	Product Support (Default)	<input type="checkbox"/>	<input type="checkbox"/>
No Access Profile	Product Support (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Outside Sales Rep	Product Support (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Read Only	Product Support (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Sales Rep	Product Support (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Sales User	Product Support (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Solution Manager	Product Support (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Standard User	Product Support (Default)	<input type="checkbox"/>	<input type="checkbox"/>

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

Record Type

Existing Record Type:

Record Type Label: Internal

Record Type Name: Internal

Support Process: Internal

Description: To be used when creating internal cases

Active:

! = Required Information

Select the Enable for Profile checkbox to make the new record type available to a profile. Users assigned to this profile will be able to create records of this record type, or assign this record type to existing records. To make the new record type the default for a profile, select the Make Default checkbox.

Profile Name	Record Types Currently Available	Enable for Profile	Make Default
Accounts Receivable User	Product Support (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Call Center Rep	Product Support (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Consulting User	Product Support (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Contract Manager	Product Support (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Executive User	Product Support (Default)	<input type="checkbox"/>	<input type="checkbox"/>
General Marketing User	Product Support (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Inside Sales Rep	Product Support (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Marketing User	Product Support (Default)	<input type="checkbox"/>	<input type="checkbox"/>
No Access Profile	Product Support (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Outside Sales Rep	Product Support (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Read Only	Product Support (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Sales Rep	Product Support (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Sales User	Product Support (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Solution Manager	Product Support (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Standard User	Product Support (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Support User	Product Support (Default)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
System Administrator	Product Support (Default)	<input type="checkbox"/>	<input type="checkbox"/>
VAR User	Product Support (Default)	<input type="checkbox"/>	<input type="checkbox"/>

Apply the layout to all profiles:

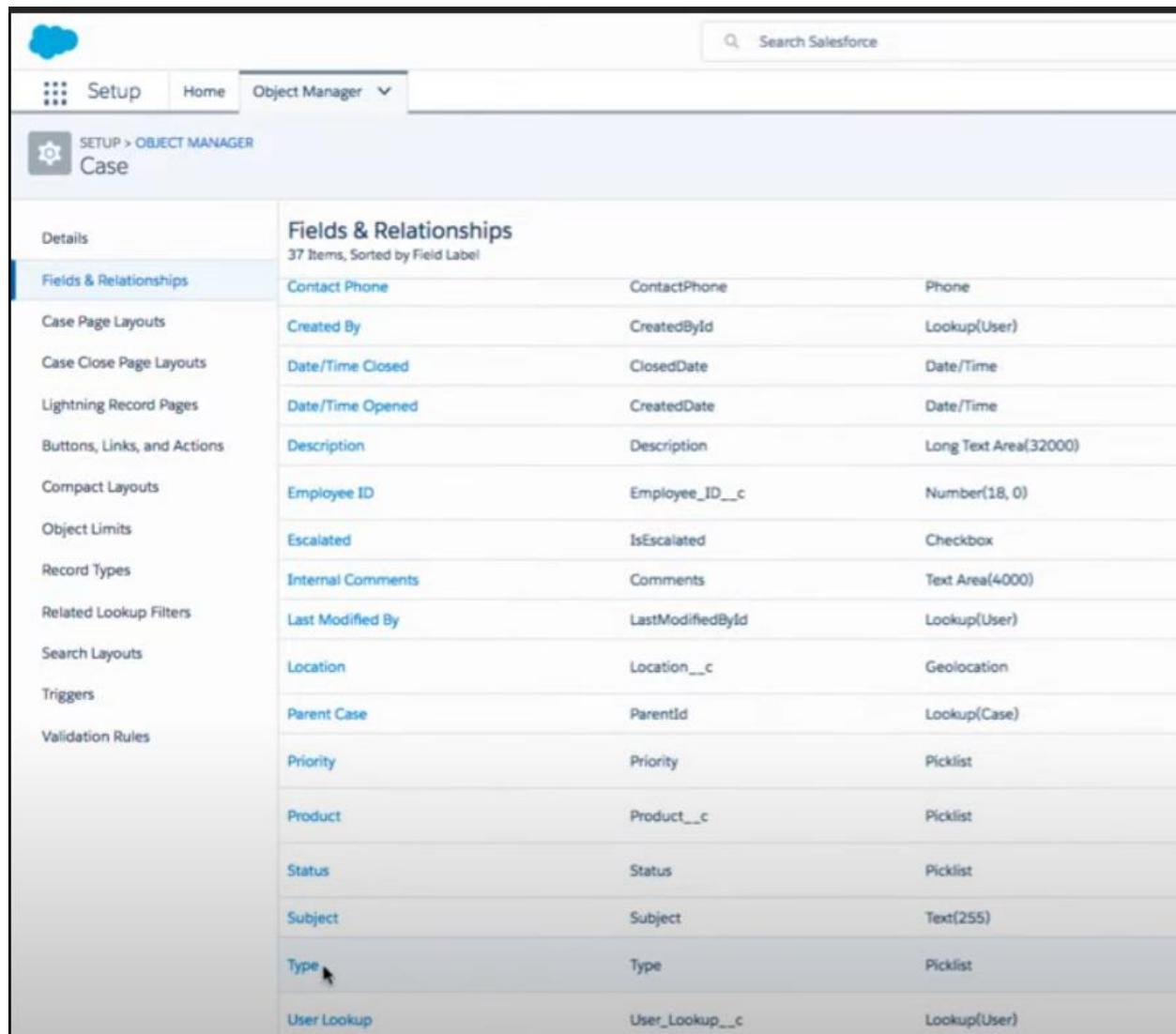
The screenshot shows the Salesforce Object Manager interface for creating a new record type named "Case". The left sidebar is a navigation menu with various options like Details, Fields & Relationships, Case Page Layouts, Case Close Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Object Limits, Record Types (which is selected), Related Lookup Filters, Search Layouts, Triggers, and Validation Rules. The main content area is titled "Step 2. Assign page layouts" and "Case". It displays record details: Case Record Type (Internal), Record Type Name (Internal), Support Process (Internal), and Description ("To be used when creating internal cases"). A note says "Select the page layout that users with this profile see for records with this record type. After saving, choose the picklist values that are available with this record type." Below this, there are two radio button options: "Apply one layout to all profiles" (selected) and "Apply a different layout for each profile". A table lists profiles and their assigned page layouts, all set to "Internal": Accounts Receivable User, Call Center Rep, Consulting User, Contract Manager, Executive User, General Marketing User, Inside Sales Rep, Marketing User, No Access Profile, Outside Sales Rep, Read Only, Sales Rep, Sales User, Solution Manager, Standard User, Support User, System Administrator, and VAR User. At the bottom right are buttons for Previous, Save & New, Save, and Cancel.

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.

The screenshot shows the Salesforce Object Manager interface for creating a new Record Type. The left sidebar navigation bar includes links for Setup, Home, Object Manager, Details, Fields & Relationships, Case Page Layouts, Case Close Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Object Limits, Record Types (which is selected), Related Lookup Filters, Search Layouts, Triggers, and Validation Rules. The main content area has a header "Record Type" with fields for Existing Record Type (Master), Record Type Label (External), Record Type Name (External), Support Process (External), Description (To be used when creating External cases), and Active (checked). A note below says "Select the Enable for Profile checkbox to make the new record type available to a profile. Users assigned to this profile will be able to create records of this record type, or assign this record type to existing records. To make the new record type the default for a profile, select the Make Default checkbox." Below this is a table mapping profiles to record types:

Profile Name	Record Types Currently Available	Enable for Profile	Make Default
Accounts Receivable User	Product Support (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Call Center Rep	Product Support (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Consulting User	Product Support (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Contract Manager	Product Support (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Executive User	Product Support (Default)	<input type="checkbox"/>	<input type="checkbox"/>
General Marketing User	Product Support (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Inside Sales Rep	Product Support (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Marketing User	Product Support (Default)	<input type="checkbox"/>	<input type="checkbox"/>
No Access Profile	Product Support (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Outside Sales Rep	Product Support (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Read Only	Product Support (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Sales Rep	Product Support (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Sales User	Product Support (Default)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Solution Manager	Product Support (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Standard User	Product Support (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Support User	Product Support (Default), Internal	<input checked="" type="checkbox"/>	<input type="checkbox"/>
System Administrator	Product Support (Default)	<input type="checkbox"/>	<input type="checkbox"/>
VAR User	Product Support (Default)	<input type="checkbox"/>	<input type="checkbox"/>

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



The screenshot shows the Salesforce Object Manager interface for the Case object. The top navigation bar includes the Salesforce logo, Setup, Home, and Object Manager. The left sidebar lists various configuration tabs: 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, and Validation Rules. The main content area is titled 'Fields & Relationships' and displays 37 items, sorted by Field Label. A table lists the field name, API name, data type, and description. The 'Type' field is highlighted with a cursor, indicating it is the current target for modification. The table rows are as follows:

	Fields & Relationships	37 Items, Sorted by Field Label	
Contact Phone	ContactPhone	Phone	
Created By	CreatedBy	Lookup(User)	
Date/Time Closed	ClosedDate	Date/Time	
Date/Time Opened	CreatedDate	Date/Time	
Description	Description	Long Text Area(32000)	
Employee ID	Employee_ID__c	Number(18, 0)	
Escalated	IsEscalated	Checkbox	
Internal Comments	Comments	Text Area(4000)	
Last Modified By	LastModifiedBy	Lookup(User)	
Location	Location__c	Geolocation	
Parent Case	ParentId	Lookup(Case)	
Priority	Priority	Picklist	
Product	Product__c	Picklist	
Status	Status	Picklist	
Subject	Subject	Text(255)	
Type	Type	Picklist	
User Lookup	User_Lookup__c	Lookup(User)	

Add values:

The screenshot shows the Salesforce Object Manager interface for the Case object. The left sidebar lists various setup options like Details, Fields & Relationships, Case Page Layouts, and Validation Rules. The main content area is titled 'Case Field Type' and shows the configuration for the 'Type' field. It includes sections for Field Information, Field Dependencies, Validation Rules, and Case Type Picklist Values. The Case Type Picklist Values section displays three entries: Problem (API Name: Problem, Default: Assigned dynamically, Modified By: Admin User, 5/19/2017 1:38 PM), Feature Request (API Name: Feature Request, Default: Assigned dynamically, Modified By: Admin User, 5/19/2017 1:38 PM), and Question (API Name: Question, Default: Assigned dynamically, Modified By: Admin User, 5/19/2017 1:38 PM). The 'Values' column lists the picklist items: Problem, Feature Request, and Question.

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

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

The screenshot shows the Salesforce Setup interface. The left sidebar includes links for 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), and Settings (Company Settings). The main content area is titled "Case Type" and displays a list of picklist values: HR, Payroll, IT, Facilities, and Service Contract. Below this, a table maps record types to descriptions:

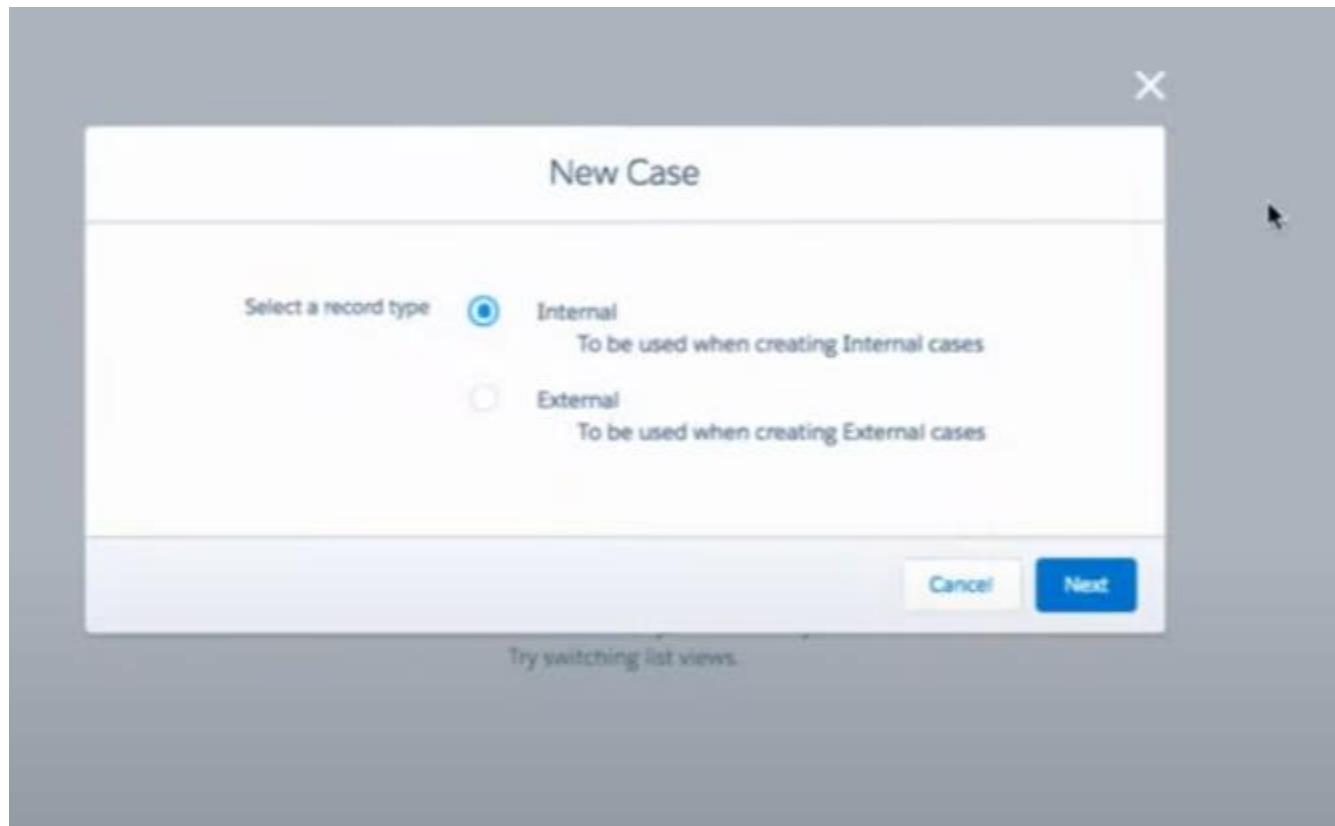
Record Type Name	Description
<input type="checkbox"/> External	To be used when creating External cases
<input checked="" type="checkbox"/> Internal	To be used when creating internal cases
<input type="checkbox"/> Product Support	Record type for product support

At the bottom right, there are "Save" and "Cancel" buttons, with "Save" being highlighted.

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

The screenshot shows the Salesforce Object Manager interface for the 'Case' object. The left sidebar has a 'Case Page Layouts' section selected. The main area displays the 'Internal' page layout configuration. The 'Fields' section includes the 'Case Record Type' field. Below it, the 'Case Sample' section shows the layout on a sample record. The 'Case Detail' section shows the standard buttons (Edit, Delete, Change Owner, Change Record Type, Close Case, Clone, Sharing) and custom buttons.

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	DESCRIPTION
500U000000HyrKRIA		1003 Problem		Customer experiencing service lag	Customer experiencing service lag
500U000000HyrrfIAB		1005 Question		Internal: Connor McCoy, payroll question	Connor has a question about his paycheck
500U000000Hyrt7IAE		1006 Feature Request		Spider Laptop memory upgrade	Customer wants to upgrade Spider Laptop memory
500U000000HyrqhIA		1004 Problem		Internal: Nina Gupta needs a new keyboard	Nina in HR needs a new keyboard
		Pending Department Approval			
500U000000HysDbIA		1007 Approval	012U0000000WaCgIAK	Payroll Problem	Payroll Problem
500U000000HysDgIA		1008 Problem	012U0000000WaCIIAK	Spider Laptop not enough memory	Customer experiencing service lag

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

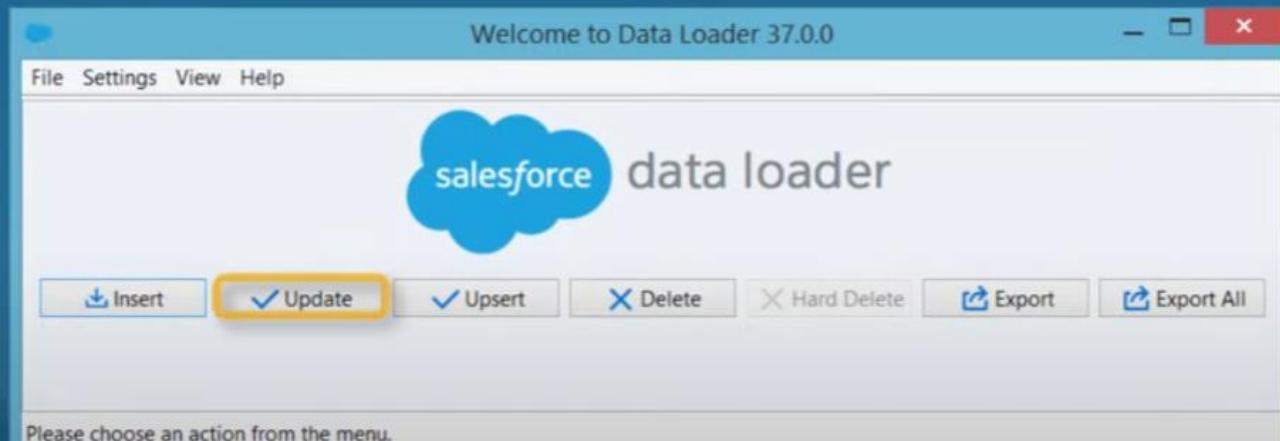
Apply correct ID to empty records:

Use Data Loader to Assign Record Types

ID	CASENUM	TYPE	RECORDTYPEID	SUBJECT	DESCRIPTION
500U0000000HyrKRIA	1003	Problem	012U0000000WaCIIAK	Customer experiencing service lag	Customer running r
500U0000000HyrrfIAB	1005	Question	012U0000000WaCgIAK	Internal: Connor McCoy, payroll question	Connor h paycheck
500U0000000Hyrt7IAE	1006	Feature Request	012U0000000WaCIIAK	Spider Laptop memory upgrade	Customer installed
500U0000000HyrqhIA	1004	Problem	012U0000000WaCgIAK	Internal: Nina Gupta needs a new keyboard	Nina in H
		Pending Department			
500U0000000HysDbIA	1007	Approval	012U0000000WaCgIAK	Payroll Problem	Payroll P
500U0000000HysDgIA	1008	Problem	012U0000000WaCIIAK	Spider Laptop not enough memory	Customer

Use Data Loader Update to modify records with new IDs:

Use Data Loader to Assign Record Types





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

Some Users Need Additional Access



- + Transfer Leads
- + Custom App Access

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

Permission Sets

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

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

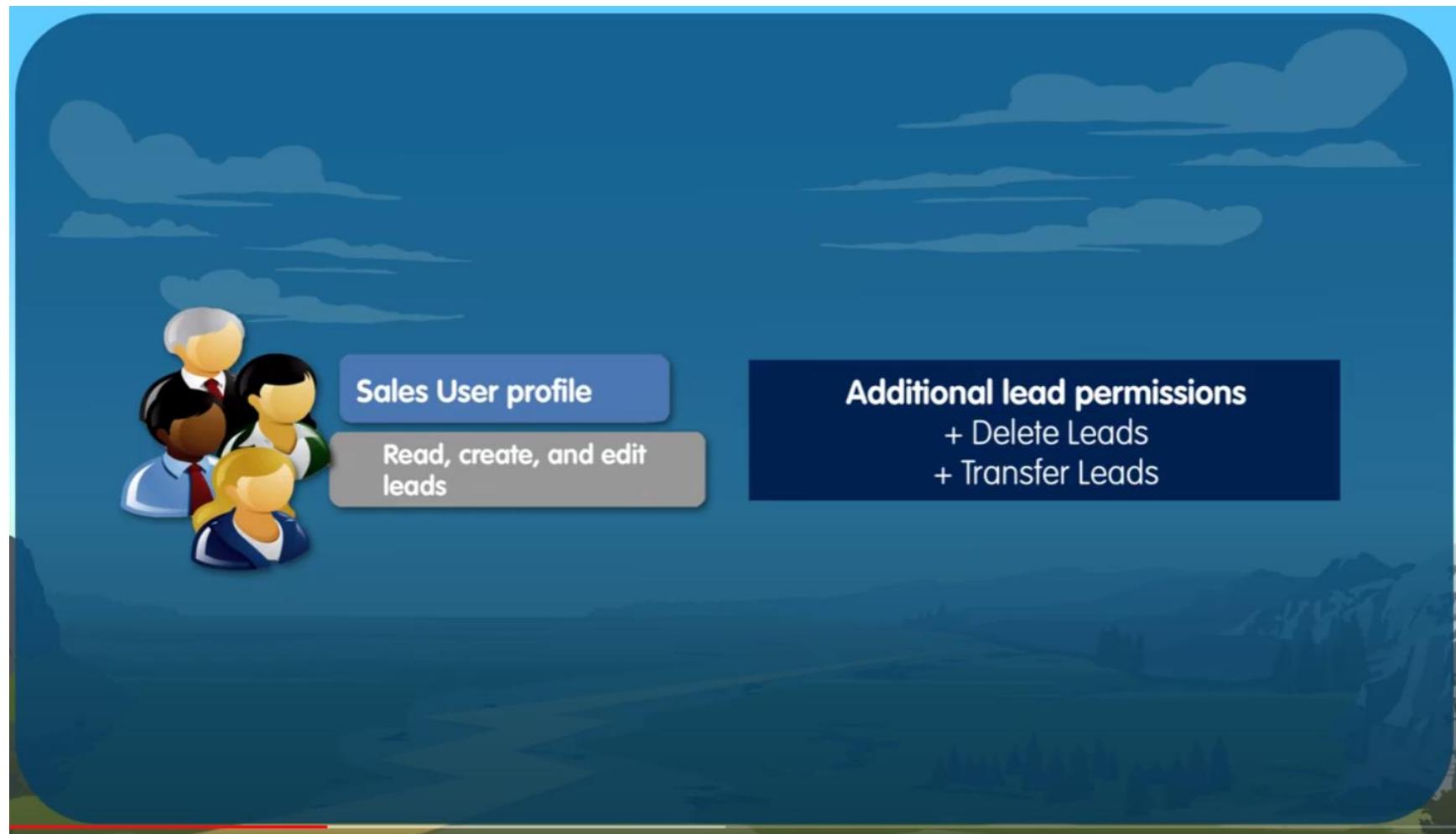
Additional lead permissions

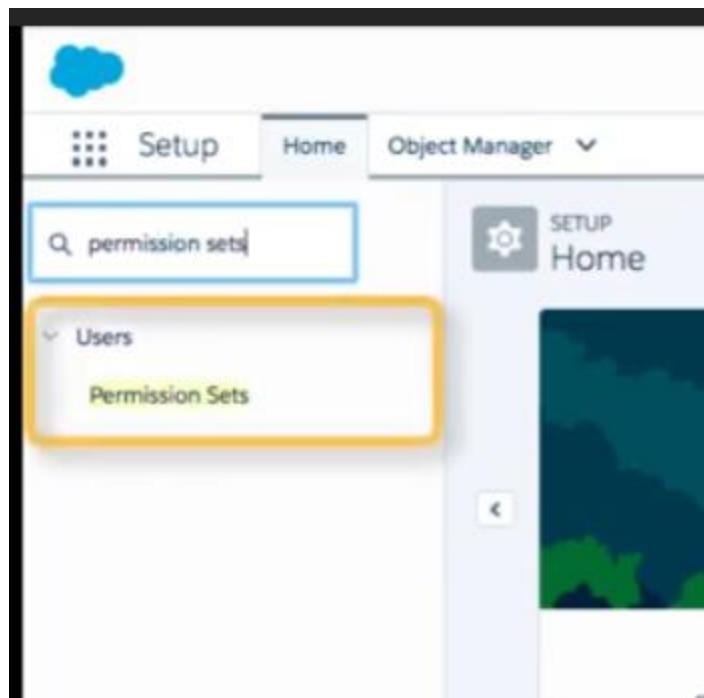
- + Delete Leads
- + Transfer Leads

Custom app & component access

- + Custom app access
- + Custom tabs access
- + Visualforce page access
- + Apex class access

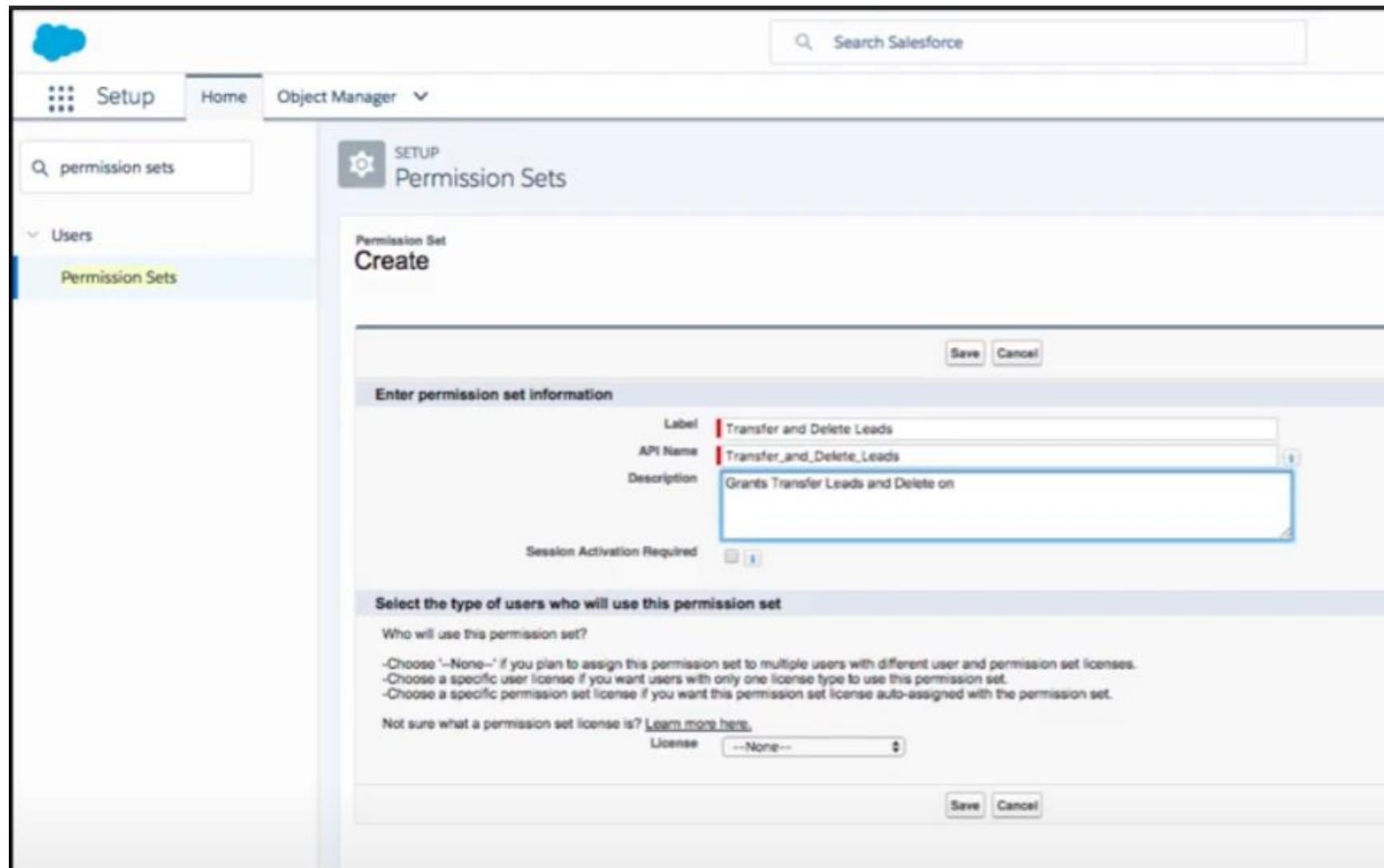
Permission Sets are created to provide additional permission.





A screenshot of the 'Permission Sets' list page in Salesforce. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar contains the text 'permission sets'. The sidebar shows 'Users' expanded, with 'Permission Sets' selected. The main content area displays a table titled 'Permission Sets' with one row. The row contains a 'New' button (highlighted with a red box), an 'Action' column with 'Edit | Delete | Create New View' options, a 'Permission Set Label' column with 'Delete Contacts', a 'Description' column with 'Delete', and a 'License' column with 'Salesforce'. A navigation bar at the bottom includes letters from A to Z and an 'All' option.

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:

The screenshot shows the Salesforce Permission Sets page. At the top, there's a navigation bar with icons for Home, Object Manager, and a search bar labeled "Search Salesforce". Below the navigation is a sidebar with links for Users and Permission Sets, where "Permission Sets" is currently selected. The main content area is titled "Transfer and Delete Leads" and displays the "Permission Set Overview" for this specific set. It includes fields for Description (Grants Transfer Leads and Delete on Leads), License (Salesforce), Session Activation Required (unchecked), Created By (Admin User, 7/7/2017 3:30 PM), API Name (Transfer_and_Delete_Leads), Namespace Prefix (empty), Last Modified By (Admin User, 7/7/2017 3:30 PM), and Video Tutorial / Help for this Page (link). The page is divided into two main sections: "Apps" and "System". The "Apps" section contains a list of permissions: Assigned Apps, Assigned Connected Apps, Object Settings, App Permissions, Apex Class Access, Visualforce Page Access, External Data Source Access, Named Credential Access, and Custom Permissions. The "System" section contains a list of permissions: System Settings and System Permissions. A yellow border highlights the "Apps" section. A red horizontal bar is at the bottom of the page, and a video player interface is visible at the very bottom.

App Settings:

Description	Grants Transfer Leads and Delete-on Leads	API Name	Transfer_and_Delete_Leads
Licensee	Salesforce	Namespace Prefix	
Session Activation Required		Last Modified By	Admin User, 7/7/2017 3:30 PM
Created By	Admin User, 7/7/2017 3:30 PM		

Assigned Apps
Settings that specify which apps are visible in the app menu

Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu

Object Settings
Permissions to access objects and fields, and settings such as tab availability

App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access
Permissions to execute Apex classes

Visualforce Page Access
Permissions to execute Visualforce pages

External Data Source Access
Permissions to authenticate against external data sources

Named Credential Access
Permissions to authenticate against named credentials

Custom Permissions
Permissions to access custom processes and apps

System Permissions
Permissions to perform actions that apply across apps, such as "Modify All Data"

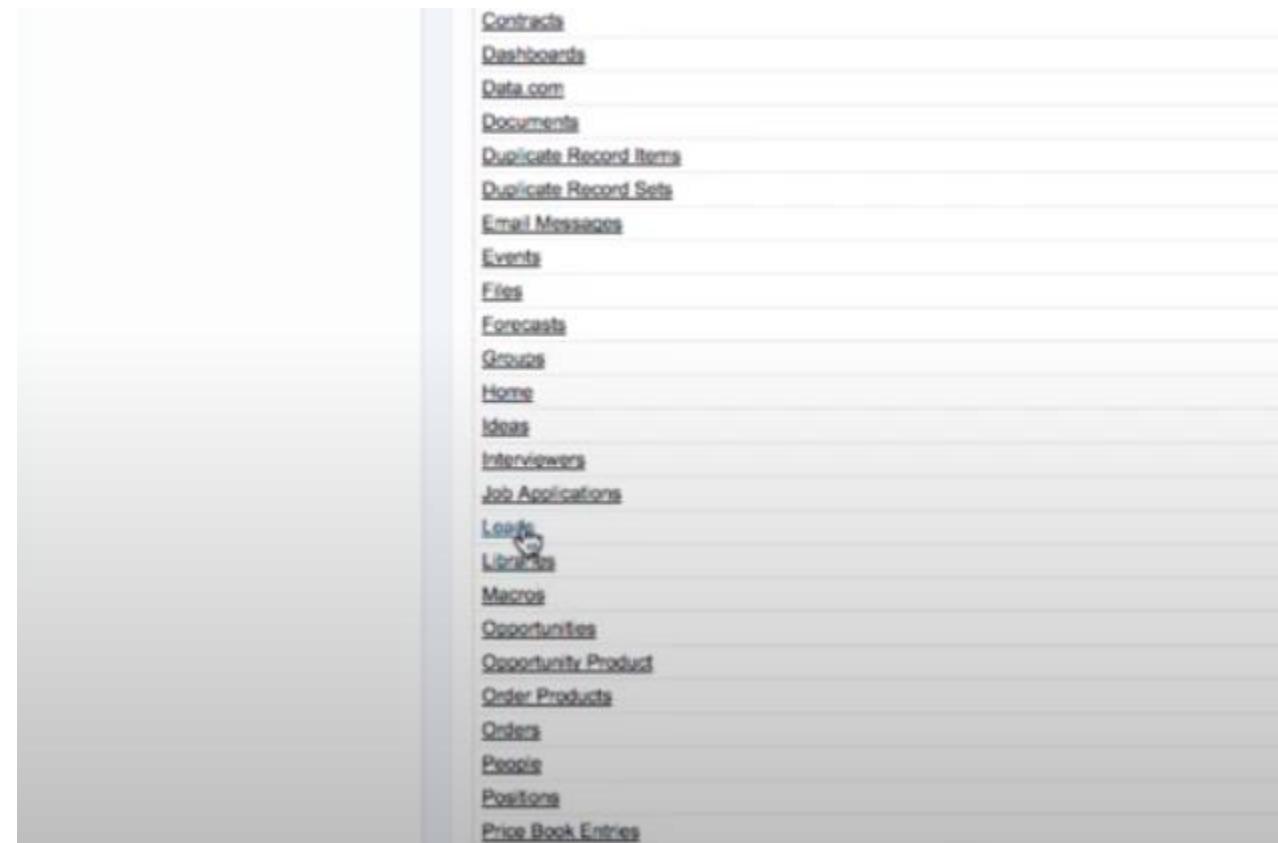
Click on Object Settings:

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. In the 'Permission Sets' section, the 'Transfer and Delete Leads' permission set is displayed. The 'Object Settings' tab is active, showing a list of objects and their current permissions. A yellow box highlights the 'Object Permissions' column for the 'Accounts' object, which is listed as 'No Access'. The table also includes columns for 'Total Fields' and 'Tab Settings'.

Object Name	Object Permissions	Total Fields	Tab Settings
Accounts	No Access	26	—
App Launcher	—	—	—
Appliances	—	12	—
Asset Relationships	—	11	—
Assets	—	25	—
Campaign Members	—	33	—
Campaigns	—	44	—
Cases	—	34	—
Chatter	—	—	—
Contacts	—	29	—
Content	—	—	—
Contracts	—	24	—
Dashboards	—	—	—
Data.com	—	—	—
Documents	—	—	—
Duplicate Record Items	—	7	—
Duplicate Record Sets	—	7	—
Email Messages	—	22	—
Events	—	21	—
Files	—	—	—
Forecasts	—	—	—
Groups	—	—	—
Home	—	—	—
Ideas	No Access	6	—
Interviewers	No Access	7	—
Job Applications	No Access	8	—
Leads	No Access	27	—
Licenses	—	—	—
Macros	No Access	7	—
Opportunities	No Access	28	—
Opportunity Product	—	13	—
Order Products	—	15	—
Quotes	No Access	33	—
Peoples	—	—	—

No permissions are enabled.

Click on Leads object:



Contracts
Dashboards
Data.com
Documents
Duplicate Record Items
Duplicate Record Sets
Email Messages
Events
Files
Forecasts
Groups
Home
Ideas
Interviewers
Job Applications
Leads
Libraries
Macros
Opportunities
Opportunity Product
Order Products
Orders
People
Positions
Price Book Entries

Modify settings as required:

The screenshot shows the Salesforce Setup interface for managing Permission Sets. The current page is titled "Transfer and Delete Leads".

Permission Set Overview > Object Settings > Leads

Leads

Tab Settings

Available	Visible
<input type="checkbox"/>	<input checked="" type="checkbox"/>

Lead: Record Type Assignments

Record Types	Assigned Record Types
Telemarketing Lead	<input type="checkbox"/>
Tradeshow Lead	<input type="checkbox"/>
Web to Lead	<input type="checkbox"/>

Object Permissions

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input checked="" type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input type="checkbox"/>

Field Permissions

Field Name	Read Access	Edit Access
Address	<input type="checkbox"/>	<input type="checkbox"/>
Annual Revenue	<input type="checkbox"/>	<input type="checkbox"/>
Campaign	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Company	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Created By	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Data.com Key	<input type="checkbox"/>	<input type="checkbox"/>
Description	<input type="checkbox"/>	<input type="checkbox"/>
Do Not Call	<input type="checkbox"/>	<input type="checkbox"/>
Email	<input type="checkbox"/>	<input type="checkbox"/>
Email Opt Out	<input type="checkbox"/>	<input type="checkbox"/>

3:26 / 6:16

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:

The screenshot shows the Salesforce 'Permission Sets' interface. At the top left is a 'SETUP' icon. The main title is 'Permission Sets'. Below it, the specific permission set is named 'Transfer and Delete Leads'. A search bar and buttons for 'Clone', 'Delete', 'Edit Properties', and 'Manage Assignments' are visible. The navigation path is 'Permission Set Overview > Object Settings > Leads'. On the left, a sidebar lists 'Leads', 'Tab Settings' (with 'Available' selected), and 'Lead: Record Type Assignment' (with 'Record Types' expanded, showing 'Telemarketing Lead', 'Tradeshow Lead', and 'Web to Lead'). The main content area is titled 'Leads' under 'Object Settings'. It contains sections for 'Apps' (with 'Assigned Apps' and 'Assigned Connected Apps'), 'Object Settings' (selected), 'App Permissions' (with a highlighted 'Apex Class Actions' link), 'Visualforce Page Access', 'External Data Source Access', 'Named Credential Access', 'Custom Permissions', and 'System' (selected, showing 'System Permissions'). An 'Edit' button is located at the top right of the main content area. Below the main content area is a section titled 'Object Permissions'.

Using search criteria:

The screenshot shows the Salesforce 'Permission Sets' page. At the top left is a 'SETUP' icon and the word 'Permission Sets'. Below this, the title 'Permission Set' and 'Transfer and Delete Leads' are displayed. A search bar contains the text 'tran'. To the right of the search bar are buttons for 'Clone', 'Delete', 'Edit Properties', and 'Manage Assignments'. On the left, a sidebar lists categories: 'App Permissions', 'Object Settings' (which is currently selected), and 'System Permissions'. Under 'App Permissions', items include 'Activate Contracts', 'Approve Contracts', 'Delete Activated Contracts', 'Transfer Cases', and 'Transfer Leads', which is highlighted with a yellow background and a cursor icon. Under 'Object Settings', items include 'Contracts'. Under 'System Permissions', items include 'Manage Translation', 'Transfer Record', 'Manage Call Centers', 'Manage Cases', 'Manage Categories', 'Manage Macros Users Can't Undo', and 'Manage Published Solutions'. To the right of the sidebar is a table titled 'Permissions' with columns 'Enabled' and 'Description'. The table lists several permissions, each with a checkbox and a brief description.

Enabled	Description
<input type="checkbox"/>	Edit their own case comments
<input type="checkbox"/>	Import solutions for the organization
<input type="checkbox"/>	Create, edit, and delete business units
<input type="checkbox"/>	Create, import, edit, and delete cases
<input type="checkbox"/>	Administer case settings, including case types
<input type="checkbox"/>	Define and modify solution categories
<input type="checkbox"/>	Create, update, and run macros
<input type="checkbox"/>	Create, edit, and delete public profiles

Enable Transfer Leads:

▼ Sales		
Permission Name	Enabled	Description
Access to view Data Assessment	<input type="checkbox"/>	Access to view Data Assessment. Data Assessment provides a summary of the state and quality of the org's CRM data.
Activate Contracts	<input checked="" type="checkbox"/>	Change contract status to Activated.
Activate Orders	<input checked="" type="checkbox"/>	Change order status to Activated.
Approve Contracts	<input checked="" type="checkbox"/>	Approve or reject a contract from a related list.
Convert Leads	<input checked="" type="checkbox"/>	Convert leads into accounts, contacts, and opportunities.
Delete Activated Contracts	<input checked="" type="checkbox"/>	Delete contracts, regardless of their status.
Edit Activated Orders	<input checked="" type="checkbox"/>	Edit an order record once it is activated.
Edit Opportunity Product Sales Price	<input type="checkbox"/>	Change the sales price on opportunity line items.
Import Leads	<input checked="" type="checkbox"/>	Import leads and update campaign history.
Import Personal Contacts	<input checked="" type="checkbox"/>	Import personal accounts and contacts.
Manage Leads	<input checked="" type="checkbox"/>	Change the status of multiple leads in a list view.
Send Stay-in-Touch Requests	<input type="checkbox"/>	Send Stay-in-Touch update emails.
Transfer Leads	<input checked="" type="checkbox"/>	Change a lead's owner.

Assign to User – Click on Manage Assignments:

The screenshot shows the Salesforce Setup interface for managing Permission Sets. The current view is for the 'Transfer and Delete Leads' permission set. At the top, there is a toolbar with a search bar, 'Clone', 'Delete', 'Edit Properties', and a highlighted 'Manage Assignments' button. Below the toolbar, the breadcrumb navigation shows 'Permission Set Overview > App Permissions'. The main area displays the 'App Permissions' section for the 'Call Center' category. A table lists two permissions: 'Edit Case Comments' and 'Import Solutions'. The 'Edit Case Comments' row includes a 'Description' column with the note 'Edit their own case comments but not other user's'. The 'Import Solutions' row includes a 'Description' column with the note 'Import solutions for the organization.'

Click on Add Assignments:

The screenshot shows the Salesforce Setup - Users page. At the top left is a gear icon labeled "SETUP". To its right is a blue header bar with the word "Users". Below the header, the page title is "Assigned Users" and the sub-section title is "Transfer and Delete Leads". A link "« Back to: Permission Set" is visible. The main content area displays a table with columns: "Full Name", "Alias", "Username", and "Last Login". Above the table are two buttons: "Add Assignments" and "Remove Assignments". A cursor arrow points to the "Add Assignments" button. Below the table, another set of "Add Assignments" and "Remove Assignments" buttons is visible. A message "No records to display." is shown in the table body.

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

SETUP
Users

Assign Users
Sales Users

View: [Sales Users](#) [Edit](#) | [Create New View](#)

Action	Full Name	Alias	Username
Edit Login	Bailey, Kevin	kbaile	kbailey.u8k31xjkoos.iq11cdrtbr@awcomputing5.19a.com
Edit Login	Bressan, Anna	abres	abressan.m5bzs7orwvos.sktuchifey@awcomputing5.19a.com
Edit Login	Brown, Courtney	cbrow	cbrown.ejgaid6xhn.grky0xdnmmt@awcomputing5.19a.com
Edit Login	Chang, Jin	jchan	jchang.tbhxzzd13dn.kcz3q9q0akyd@awcomputing5.19a.com
<input checked="" type="checkbox"/>	Cooper, Kathy	kcoop	kcooper.zhfimhzikmit.sy8xbnlpubkr@awcomputing5.19a.com
Edit Login	Daniels, Amy	adani	adaniels.g28hpae6wqh.ybk4qkowvvf@awcomputing5.19a.com
<input checked="" type="checkbox"/>	Hudson, David	dhuds	dhudson.1zzmskdseu1s.adzeoktpstz@awcomputing5.19a.com
Edit Login	Ishikawa, Yuko	yishi	yishikawa.tkoyrese2btqz1.n0x0oig75xcd@awcomputing5.19a.com
Edit Login	Jenkins, Tony	tjenk	tjenkins.m84ppktqdfn.fombxorsemfz@awcomputing5.19a.com
Edit Login	Lin, An	alin	alin.3q5cnxxz9a7p.hfuwkkhzhmn0@awcomputing5.19a.com
Edit Login	Lopez, Marcela	mlope	mlopez.nca4of1ogalv7.morgnfpz@h@awcomputing5.19a.com
Edit Login	Reyes, Javier	jreye	jreyes.w3dm3fbxiwwt.mwspeowixi6@awcomputing5.19a.com
Edit Login	Shah, Anjana	ashah	ashah.7rah25z8cic.tsq3sh14q6y@awcomputing5.19a.com
Edit Login	Smith, Phil	psmit	psmith.zfogmixt9nem.zor5z0kuqf2@awcomputing5.19a.com
Edit Login	Wilson, Matt	mwils	mwilson.7yi4kazoww!iugckuzx7kh@awcomputing5.19a.com
Edit Login	Wong, Alan	awong	awong.ghlyxwhi83.firebaseio@awcomputing5.19a.com

[Assign](#) [Cancel](#)

Show me fewer ▲ records per list page

Assignment Summary page shows what has been done:

The screenshot shows the 'Assignment Summary' page under the 'Transfer and Delete Leads' section. A green success message at the top states: 'Permission set Transfer and Delete Leads has been assigned to 2 users.' Below this, a table lists two users: Kathy Cooper and David Hudson. Each user's row includes their full name, username, user license (Salesforce), and a success message. A 'Done' button is visible at the bottom of the table.

Full Name	Username	User License	Message
Kathy Cooper	kcooper.zfhfmhzlkmrlsyxbnlpubkr@awcomputing5.19a.com	Salesforce	Success
David Hudson	dhudson.1zzmskdkseu1s.sdzepoktpstz@awcomputing5.19a.com	Salesforce	Success

Remove Assignments:

The screenshot shows the 'Assigned Users' page under the 'Transfer and Delete Leads' section. It displays a list of users assigned to the permission set. The 'Remove Assignments' button is highlighted with a yellow box. The table includes columns for Action, Full Name, Alias, Username, Last Login, Role, Active, Profile, and Manager. Two users are listed: Kathy Cooper and David Hudson. Both are marked as active and assigned to Sales User profiles, managed by Wheeler, Allison and Heinz, Jessica respectively.

Action	Full Name	Alias	Username	Last Login	Role	Active	Profile	Manager
<input type="checkbox"/> Edit Login	Cooper, Kathy	kcoopo	kcooper.zfhfmhzlkmrlsyxbnlpubkr@awcomputing5.19a.com		US Sales Director	✓	Sales User	Wheeler, Allison
<input type="checkbox"/> Edit Login	Hudson, David	ghuds	dhudson.1zzmskdkseu1s.sdzepoktpstz@awcomputing5.19a.com		EMEA Sales Rep	✓	Sales User	Heinz, Jessica

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

The screenshot shows the 'Users' detail page in a CRM application. At the top, there's a 'SETUP' button and a 'Users' title. Below the title, there are several user details: Created By (Admin User, 5/19/2017 1:38 PM), Last Password Change or Reset (10/7/2011 1:03 AM), Modified By (Admin User, 5/19/2017 1:38 PM). On the right, there are sections for Fax, Mobile, Email Encoding (General US & Western Europe (ISO-8859-1, ISO-LATIN-1)), Employee Number, Used Data Space (0 B [View]), Used File Space (14 KB [View]), and Last Login. Below these details are buttons for Edit, Sharing, Reset Password, Login, and Freeze. A large yellow box highlights the 'Permission Set Assignments' section. This section has columns for Action (Transfer and Delete Leads), Permission Set Label (Leads), and Date Assigned (7/7/2017). There are also buttons for Edit Assignments and Permission Set Assignments Help. Below this, there are sections for 'Permission Set Assignments: Activation Required' (No records to display) and 'Permission Set License Assignments' (No records to display). At the bottom, there's a 'Personal Groups' section with a 'New Group' button and Personal Groups Help.

Add or remove Permission Sets as needed:

The screenshot shows the 'Permission Sets' setup page in Salesforce. At the top left is a 'SETUP' icon and the title 'Permission Sets'. Below that, it says 'Permission Set Assignments' and 'Kathy Cooper'. On the right are 'Save' and 'Cancel' buttons. The main area has two sections: 'Available Permission Sets' on the left and 'Enabled Permission Sets' on the right. In the 'Available' section, 'Delete Contacts' is listed with an 'Add' button (which has a hand cursor icon) and a 'Remove' button below it. In the 'Enabled' section, 'Transfer and Delete Leads' is listed. At the bottom are another 'Save' and 'Cancel' button pair.

Logged in as Kathy Sales User with additional Permission Sets:

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar People Cases

LEADS All Open Leads

45 items · Sorted by Name · Filtered by Lead Status · Updated a few seconds ago

NAME ↑	COMPANY	RATING	LEAD STATUS	OWNER ALIAS	CREATED DATE
1 Ally Gapple	STC Labs	Hot	Open	msato	5/19/2017 1:38 PM
2 Audrey Rose	STC Labs	Hot	Open	msato	5/19/2017 1:38 PM
3 Barry Bond	STC Labs	Hot	Open	lcost	5/19/2017 1:38 PM
4 Barry Chung	STC Labs	Cold	Open	msato	5/19/2017 1:38 PM
5 Barry Eichner	Big Store	Cold	Open	lcost	5/19/2017 1:38 PM
6 Betty Bennett	STC Labs	Cold	Open	lcost	5/19/2017 1:38 PM
7 Rhonda Huffman	Rio Car Recyclers	Warm	Open	msato	5/19/2017 1:38 PM

Transfer Lead to new owner:

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar People Cases

LEAD
Ally Gapple

Title: Product Manager Company: STC Labs Phone: 65-0443-7128 Email: ally.gapple@trainingorg-stclabs.com

Open Contacted Converted ✓ Mark

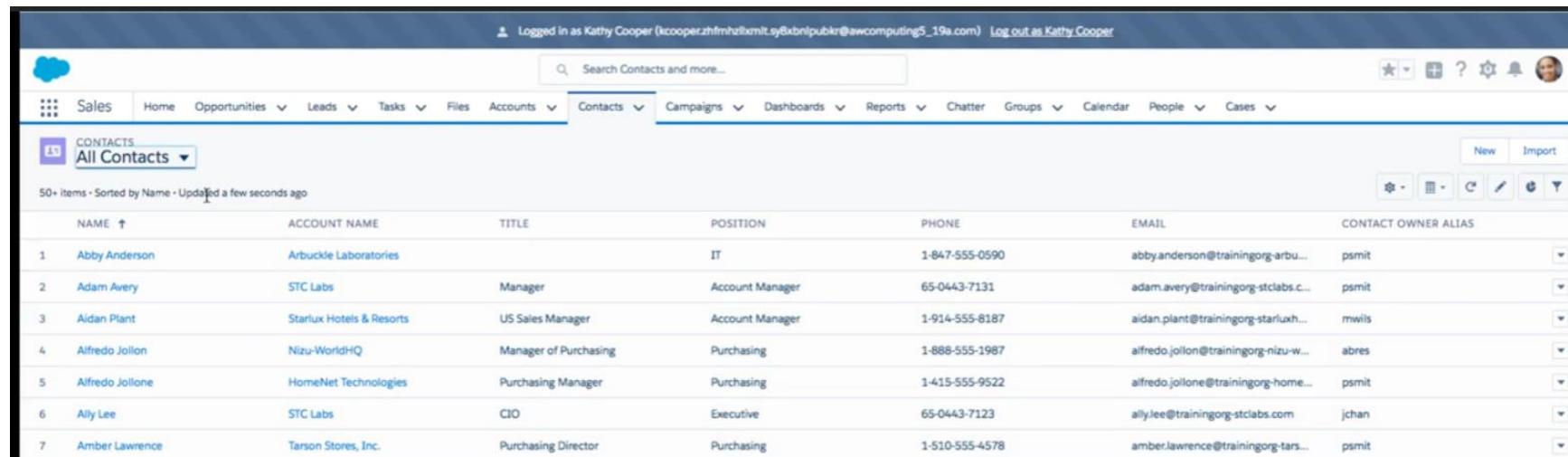
ACTIVITY CHATTER DETAILS

Email Write an email... Compose

We found no potential duplicates of this lead.

Campaign History (3)
AW 5000 Series Printer Campaign - Telemarketing
Start Date: 2/26/2017

See Contacts:



The screenshot shows the Salesforce interface with the user logged in as Kathy Cooper. The top navigation bar includes Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, People, and Cases. The Contacts tab is selected. A search bar at the top right says "Search Contacts and more...". Below the header is a toolbar with icons for New, Import, and various filters. The main area is titled "CONTACTS All Contacts" and displays a table of 7 contacts. The columns are: NAME, ACCOUNT NAME, TITLE, POSITION, PHONE, EMAIL, and CONTACT OWNER ALIAS. The contacts listed are:

	NAME	ACCOUNT NAME	TITLE	POSITION	PHONE	EMAIL	CONTACT OWNER ALIAS
1	Abby Anderson	Arbuckle Laboratories		IT	1-847-555-0590	abby.anderson@trainingorg-arbu...	psmit
2	Adam Avery	STC Labs	Manager	Account Manager	65-0443-7131	adamavery@trainingorg-stclabs.c...	psmit
3	Aidan Plant	Starlux Hotels & Resorts	US Sales Manager	Account Manager	1-914-555-8187	aidan.plant@trainingorg-starluxh...	mwillis
4	Alfredo Jollon	Nizu-WorldHQ	Manager of Purchasing	Purchasing	1-888-555-1987	alfredo.jollon@trainingorg-nizu-w...	abres
5	Alfredo Jollone	HomeNet Technologies	Purchasing Manager	Purchasing	1-415-555-9522	alfredojollone@trainingorg-home...	psmit
6	Ally Lee	STC Labs	CIO	Executive	65-0443-7123	ally.lee@trainingorg-stclabs.com	jchan
7	Amber Lawrence	Tarson Stores, Inc.	Purchasing Director	Purchasing	1-510-555-4578	amber.lawrence@trainingorg-tars...	psmit

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