

Force.com Roles

Roles in force.com can be used as security hierarchies

To setup a database table or force.com 'object' to utilize this feature

Go to>setup>Sharing settings>edit> make sure the checkbox is selected

AND

That the default access is set to private

Sharing Settings

Administration Setup

▶ Manage Users

▶ Company Profile

▼ Security Controls

Sharing Settings

Field Accessibility

Password Policies

Session Settings

This page displays your organization's sharing settings. These settings specify the level of ac

Manage sharing settings for: All Objects

Default Sharing Settings

Organization-Wide Defaults

Edit

Object	Default Access
Lead	Private
Account, Contact and Asset	Private

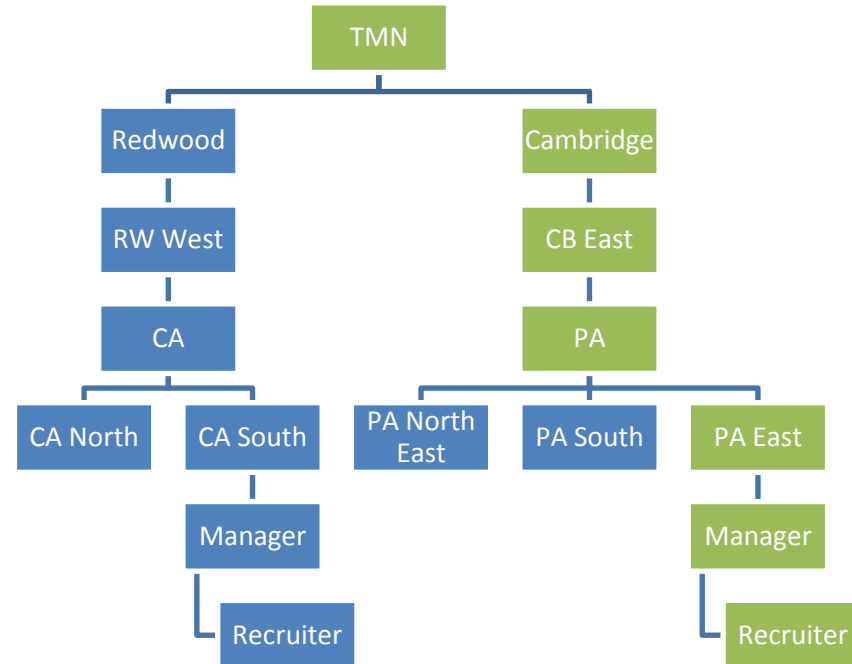
Object	Default Access	Grant Access Using Hierarchies
Prospects	Private	<input checked="" type="checkbox"/>
Search Phrase	Private	<input checked="" type="checkbox"/>
SFGA Version	Public Read Only	<input checked="" type="checkbox"/>
	Public Read/Write	

Understanding the feature

Every object record is 'owned' by a single user or a recruiter in this example

If a record is 'owned' by a recruiter in PA East
Then any user in any of the roles above
'recruiter' would have access to the record.
Shown in green

This helps a great deal in reports.
One report can be created and allow for every
user to have access. Knowing that the data
displayed in the report is based on where
each user running the report is in the security
hierarchy.



Setting up roles

With the feature, roles must be configured

Go to Setup> Roles

Administration Setup

Manage Users

Users

Mass Email Users

Roles

Permission Sets **New!**

Profiles

Public Groups

Queues

Login History

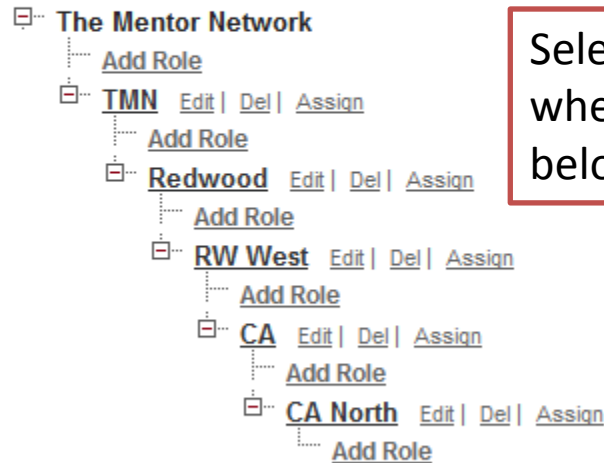
Training History

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add**

Your Organization's Role Hierarchy


[Collapse All](#) [Expand All](#)



Select 'Add Role' at the level where you want to add below it

Role Edit

Role Name

This role reports to 

Role Name as displayed on reports

- Contact Access
- ☒ Users in this role cannot access contacts that they do not own that are associated with accounts that they do own
 - ☐ Users in this role can **view** all contacts associated with accounts that they own, regardless of who owns the contacts
 - ☐ Users in this role can **edit** all contacts associated with accounts that they own, regardless of who owns the contacts
- 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

To change a roles placement in the hierarchy select this search and click the role it belongs under

Salesforce.com has a set of objects that are not used in Force.com.

Technically the Sys admin(s) have Salesforce licenses, so throughout the admin process
All of the Salesforce CRM objects are present

