

Problem statement: Sam is an experienced CRM leader who has recently joined Stark Corp as a Sales Executive. He also has a marketing background and reports directly to the CEO. He needs access to various objects and apps in Salesforce. Salesforce provides three layers of security with lots of flexibility to accommodate virtually any business need. Profiles control object-level and field-level access. Permission sets are used to provide access to additional objects. Field-level security controls providing access to individual fields within an object. Further, there are five types of record-level security: Orgwide defaults, Role hierarchy sharing, sharing rules, manual sharing, and Apex-based sharing. This five-control record-level security provides access to sets of records, or even to an individual record, for people who do not own those records.

a. Provide object-level security:

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

Profile
SAM CRM LEAD

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \(1\)](#) | [Enabled Apex Class Access \(0\)](#) | [Enabled Visualforce Page Access \(0\)](#) | [Enabled External Data Source Access \(0\)](#) | [Enabled Named Credential Access \(0\)](#) | [Enabled External Credential Principal Access \(0\)](#) | [Enabled Custom Metadata Type Access \(0\)](#) | [Enabled Custom Setting Definitions Access \(0\)](#) | [Enabled Flow Access \(0\)](#) | [Enabled Service Presence Status Access \(0\)](#) | [Enabled Custom Permissions \(0\)](#)

Profile Detail [Edit](#) [Clone](#) [Delete](#) [View Users](#)

Name	SAM CRM LEAD	Custom Profile	<input checked="" type="checkbox"/>
User License	Salesforce		
Description			
Created By	Veena Giri	8/17/2023, 12:03 AM	Modified By: Veena Giri 8/17/2023, 12:10 AM

Standard Object Permissions

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?](#)

	Basic Access				Data Administration			Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All
Accounts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Legal Entities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AI Insight Reasons	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Locations	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AI Record Insights	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Location Groups	<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"/>	Location Group Assignments	<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"/>	Macros	<input checked="" 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"/>	Messaging Sessions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Application Usage Assignments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Messaging Users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Appointment Categories	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Operating Hours	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Appointment Invitations	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Opportunities	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Appointment Schedule Aggregates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Orders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Appointment Schedule Logs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Party Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Appointment Topic Time Slots	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Payments	<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"/>	Payment Authorizations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input 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"/>	Payment Authorization Adjustments	<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"/>	Payment Gateways	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Custom Object Permissions

	Basic Access				Data Administration			Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All
Clubs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Employees	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Departments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Memberships	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Devices	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	New Courses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Session Settings

Session Times Out After: [Help](#)

Session Security Level Required at Login: [Help](#)

ii. Manage the object-level access through profiles and permission sets

Ans-

Permission Set
Sam permission det

Find Settings... Clone Delete Edit Properties Manage Assignments

Permission Set Overview

Description	API Name	Sam_permission_det
License Sales User	Namespace Prefix	
Session Activation Required	Created By	Veena Gid
Last Modified By		8/17/2023, 12:16 AM

Apps

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

Edit Sharing Reset Password Freeze

Permission Set Assignments Edit Assignments

Action	Permission Set Label	Date Assigned	Expires On
Del	CRM User	8/17/2023	
Del	Sam permission det	8/17/2023	

Permission Set Assignments: Activation Required Edit Assignments

Permission Set Label	Date Assigned	Expires On
----------------------	---------------	------------

Permission Set Group Assignments Edit Assignments

Action	Label	Date Assigned	Expires On	Session Activation Required
Del	Test 2.0	8/12/2023		<input type="checkbox"/>

Permission Set License Assignments Edit Assignments

Action	Permission Set License Label	Date Assigned
Del	CRM User	8/17/2023
Del	Sales User	8/17/2023

Personal Groups New Group

b. Even if Sam has access to objects, he still needs access to individual fields of each object.

In Salesforce, profiles also control field-level access

i. Provide field-level access to Sam

Ans- Setup>user >profile> **Field-Level Security**

Article Type Layouts

Field-Level Security

Standard Field-Level Security

Account	[View]	Operating Hours	[View]
Alternative Payment Method	[View]	Operating Hours Holiday	[View]
API Anomaly Event Store	[View]	Opportunity	[View]
Appointment Category	[View]	Opportunity Contact Role	[View]
Appointment Invitation	[View]	Opportunity Product	[View]
Appointment Invite	[View]	Order	[View]
Appointment Topic Time Slot	[View]	Order Product	[View]
Asset	[View]	Party Consent	[View]
Asset Action	[View]	Payment	[View]
Asset Action Source	[View]	Payment Authorization	[View]
Asset Relationship	[View]	Payment Authorization Adjustment	[View]
Asset State Period	[View]	Payment Gateway	[View]
Assigned Resource	[View]	Payment Group	[View]

Device Field Level Security for profile
SAM CRM LEAD

Save Cancel

Field Name	Field Type	Read Access	Edit Access
Created By	Lookup	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Currency	Picklist	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Device	Picklist (Multi-Select)	<input type="checkbox"/>	<input type="checkbox"/>
Device ID	Auto Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Last Modified By	Lookup	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Owner	Lookup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Save Cancel

SALESFORCE ADMIN AND APP BUILDER ASSIGNMENT -3

Account Field-Level Security for profile
SAM CRM LEAD

Help for this Page

Field Name	Field Type	Read Access	Edit Access
Account Currency	Picklist	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Name	Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Number	Text	<input type="checkbox"/>	<input type="checkbox"/>
Account Owner	Lookup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Site	Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Source	Picklist	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Active	Picklist	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Annual Revenue	Currency	<input type="checkbox"/>	<input type="checkbox"/>
Billing Address	Address	<input type="checkbox"/>	<input type="checkbox"/>
Clean Status	Picklist	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Created By	Lookup	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Priority	Picklist	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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

i. If you look at the organizational structure, he reports to Zeck (the CEO), and he has two Sales Reps (Jane and John) reporting to him. Show the same.

Ans- CEO as Zeck

Roles

Zeck CEO

The users shown in the **Selected Users** list are currently assigned to the role Zeck CEO.

To assign other users to this role:

- Make a selection from the dropdown 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.

Save Cancel

Available Users

Search:

All Unassigned

for:

Find

Integration User

Sayali Sales Representative

Security User

Veetik Jr Sales Representative

Add

Selected Users for Zeck CEO

Zeck G

Add

Veena Enterprises

[Add Role](#)

Zeck CEO

[Add Role](#)

SAM Sales Lead

[Add Role](#)

Jane Sales Rep

[Add Role](#)

John Sales Rep

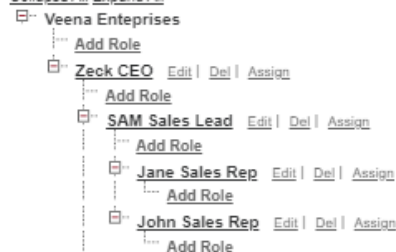
[Add Role](#)

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](#)



ii. Provide record-level security to Sam

Ans-

Sharing Settings [Help for this Page](#)

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. 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	✓
Account and Contract	Private	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Private	Private	✓
Case	Private	Private	✓
Campaign	Public Full Access	Private	✓

Department: Public Read/Write Private ☒

Device: Public Read/Write Private ☒

Employee: Public Read Only Private ☒

New Course: Public Read/Write Private ☒

Other Settings

Standard Report Visibility ☒ [i](#) Manual User Record Sharing ☐ [i](#) Manager Groups ☐ [i](#) Secure guest user [i](#)

[Save](#) [Cancel](#)

Save it

Step 2- Roles Hierarchy with view and edit option

Role [Help for this Page](#)

Technical Sup

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: [Veena Enterprises](#) » [Zack CEO](#) » [SVP, Customer Service & Support](#) » [Customer Support, International](#) » [Technical Sup](#)

[Users in Technical Sup Role](#)

Role Detail [Edit](#) [Delete](#)

Label	Technical Sup	Role Name	Technical_Sup
This role reports to	Customer Support, International	Role Name as displayed on reports	Technical_Sup
Modified By	Zack G. 8/17/2023, 1:25 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 cannot access cases that they do not own that are associated with accounts that they do own		

Users in Technical Sup Role [Assign Users to Role](#) [New User](#) [Users in Technical Sup Role Help](#)

Action	Full Name	Alias	Username	Active
Edit	Sam Sales Manager	ssm	ssm@gmail.com	✓

Step 3- Sharing rules

SETUP

Sharing Settings

Sharing Rules

Lead Sharing Rules [New](#) [Recalculate](#)

No sharing rules specified.

SALESFORCE ADMIN AND APP BUILDER ASSIGNMENT -3

Step 2: Select your rule type

Rule Type ☐ Based on record owner ☒ Based on criteria

Step 3: Select which records to be shared

Criteria

Field	Operator	Value	
Lead Currency	equals	USD	AND
Lead Source	not equal to	EUR, Web	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

Add Filter Logic...

追加オプション ☒ Include records owned by users who can't have an assigned role [i](#)

Step 4: Select the users to share with

Share with Roles **SAM Sales Lead**

Step 5: Select the level of access for the users

Lead Access **Read Only**

[Save](#) [Cancel](#)

Sharing Rules

[New](#) [Recalculate](#) [Lead Sharing Rules Help ?](#)

A sharing rule operation is currently in progress. The initiating user will receive an email when each operation finishes.

Action	Criteria	Shared With	Lead
Edit Del	(Lead: Lead Currency EQUALS USD) AND (Lead: Lead Source NOT EQUAL TO Web)	Role: SAM Sales Lead	Read Only