Getting Started with SalesForce CRM

Getting Started with SALESFORCE Part X

Description:

BISP is committed to provide BEST learning material to the beginners and advance learners. In the same series, we have prepared a complete end-to end Hands-on Beginner's Guide for SalesForce. The document focuses on security, permission and access rights. Join our professional training program and learn from experts.

History:

Version	Description Change	Author	Publish Date
0.1	Initial Draft	Chandra Prakash Sharma	10th Sep 2013
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Contents

Security and sharing Data in SalesForce.com

User permissions and Access Rights:

A permission set is a collection of settings and permissions that give users access to various tools and functions you can set user permissions and all so specify roll by using SalesForce.com, In SalesForce, you can control access to data at many different levels.

Ex:- (if you are manager of a company, if want to no one access all document means some user can read file, some user Read/write and some manage file permission. you can set permission by using user permissions and access)

Permission sets include settings for :

Control By Profile :

- Tab settings
- Object permissions
- Field permissions
- App permissions
- Apex class access
- IP Ranges
- Login history
- page layouts
- VisualForce page access
- System permissions
- Service providers (only if you've enabled SalesForce as an identity provider)

Control By Roles :

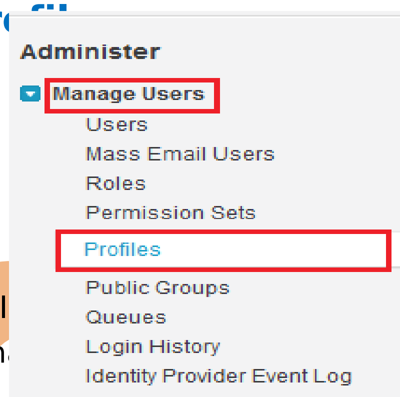
- Record type settings

The below table shows the types of permissions and access settings that are specified in profiles and permission sets :

Permission or Setting Type	In Profiles?	In Permission Sets?
Assigned apps	✓	✓
Tab settings	✓	✓
Record type assignments	✓	✓
Page layout assignments	✓	
Object permissions	✓	✓
Field permissions	✓	✓
User permissions (app and system)	✓	✓
Apex class access	✓	✓
Visualforce page access	✓	✓
Service provider access (if Salesforce is enabled as an identity provider)	✓	✓
Desktop client access	✓	
Login hours	✓	
Login IP ranges	✓	

How to set Permission by using Pr

Setup -> **Manage Users** -> **Profile**



Click on Profile then you can see new web page on right site you can below, there are you can see many standard profile , select any profile which want to set permission.

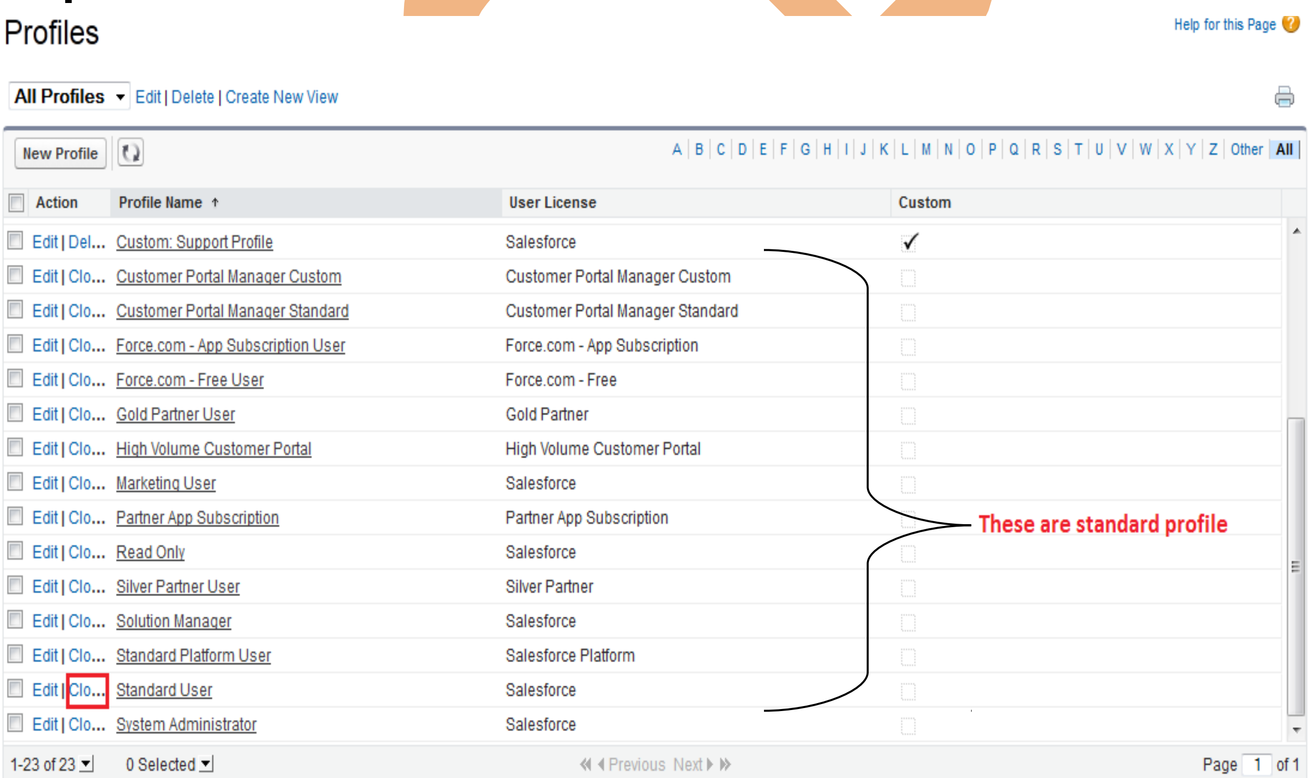
Note :- you not be direct set permission on profil

first you will create clone profile then you can ch

For create clone click on **Clone** link.

For Ex :-(I will select standard profile and click on **Clone** link you can see below.

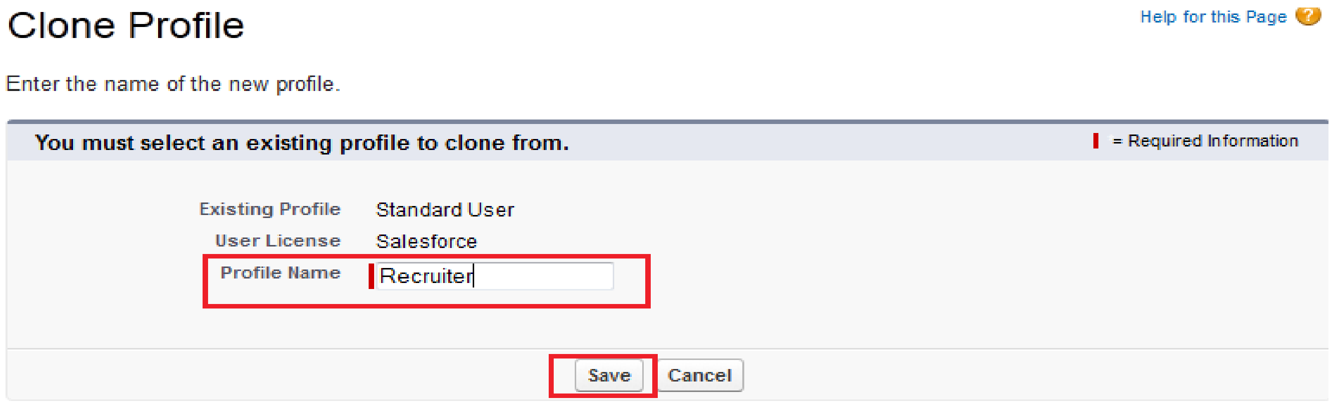
step 1 :-



Action	Profile Name ↑	User License	Custom
Edit | Del...	Custom: Support Profile	Salesforce	✓
Edit | Clo...	Customer Portal Manager Custom	Customer Portal Manager Custom	
Edit | Clo...	Customer Portal Manager Standard	Customer Portal Manager Standard	
Edit | Clo...	Force.com - App Subscription User	Force.com - App Subscription	
Edit | Clo...	Force.com - Free User	Force.com - Free	
Edit | Clo...	Gold Partner User	Gold Partner	
Edit | Clo...	High Volume Customer Portal	High Volume Customer Portal	
Edit | Clo...	Marketing User	Salesforce	
Edit | Clo...	Partner App Subscription	Partner App Subscription	
Edit | Clo...	Read Only	Salesforce	
Edit | Clo...	Silver Partner User	Silver Partner	
Edit | Clo...	Solution Manager	Salesforce	
Edit | Clo...	Standard Platform User	Salesforce Platform	
Edit | Clo...	Standard User	Salesforce	
Edit | Clo...	System Administrator	Salesforce	

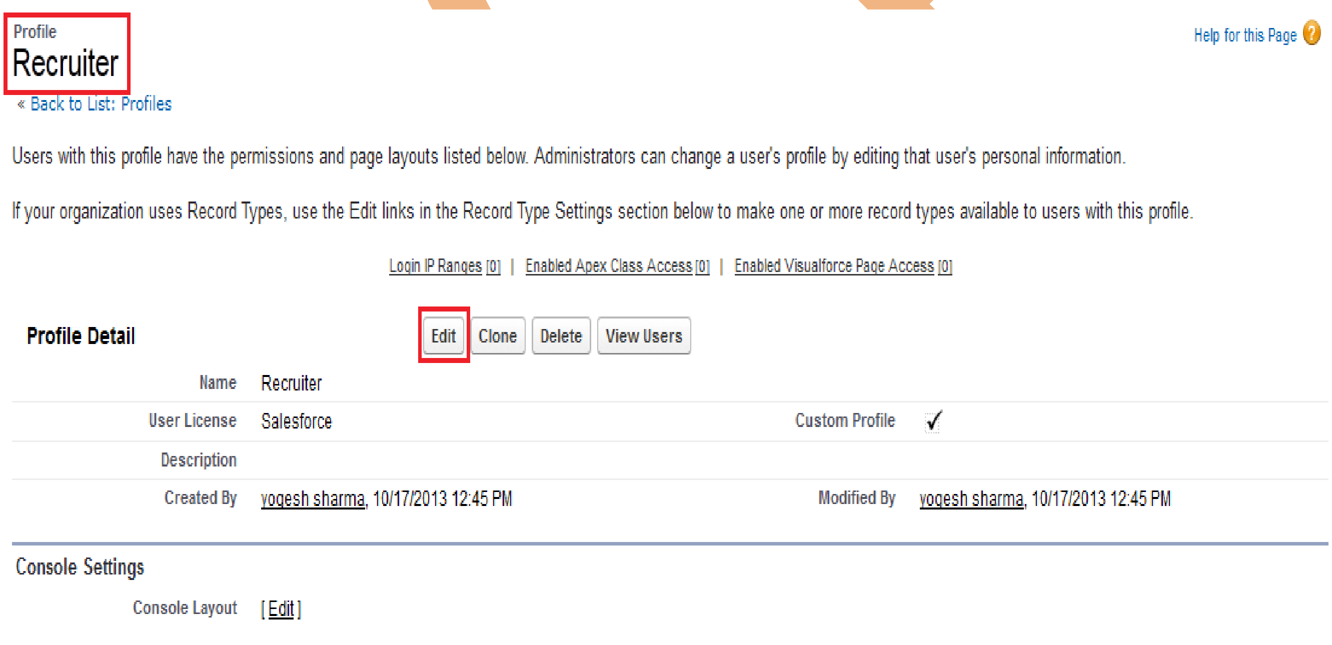
step 2 :-

Give profile name and click on **Save** button.



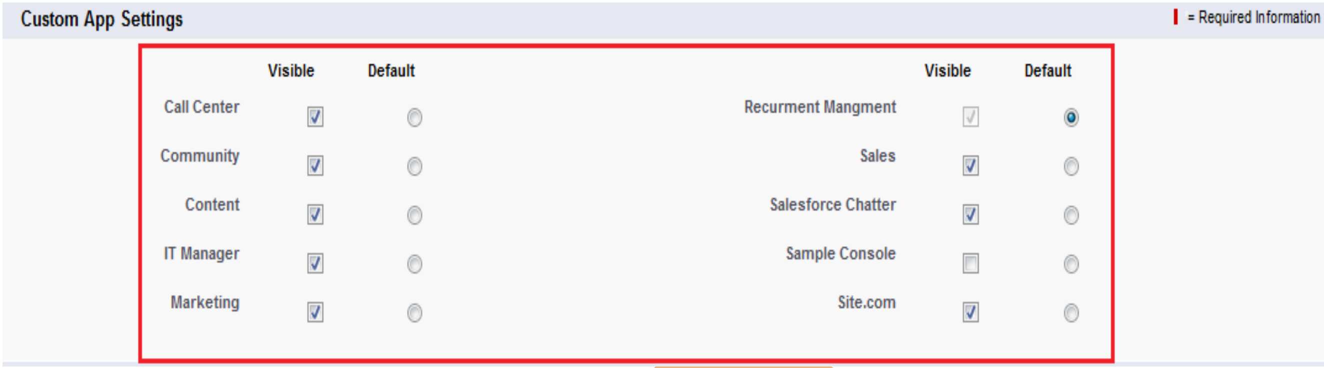
step 3 :-

After that you can see New Profile Recruiter, see below .
There is two type for editing profile you can just go to down and try edit profile or click to **Edit** button to edit profile.



After click **Edit** button You can see now all field is available in editable mode you can just check or uncheck check box for set the settings or permissions.

Custom App Setting : Checked or uncheck Radio or Check box for set custom app.



Custom App Settings

= Required Information

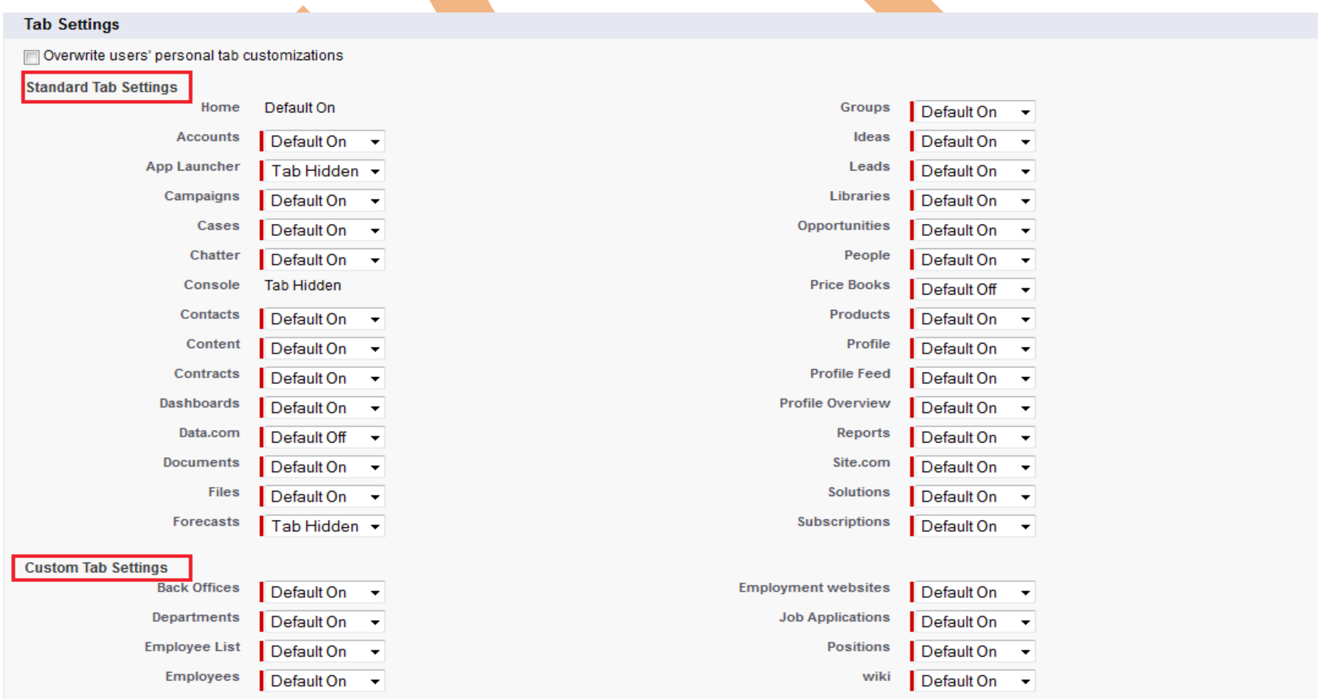
	Visible	Default		Visible	Default
Call Center	☑	○	Recurment Mangment	☑	◉
Community	☑	○	Sales	☑	○
Content	☑	○	Salesforce Chatter	☑	○
IT Manager	☑	○	Sample Console	☐	○
Marketing	☑	○	Site.com	☑	○

Tab Setting : In tab setting two profile available Standard Tab Settings, Custom Tab Settings.

In dropdown tree values available

1. Default on
2. Default off
3. Tab Hidden

You can select on requirement in Standard or Custom Settings.



Tab Settings

☐ Overwrite users' personal tab customizations

Standard Tab Settings

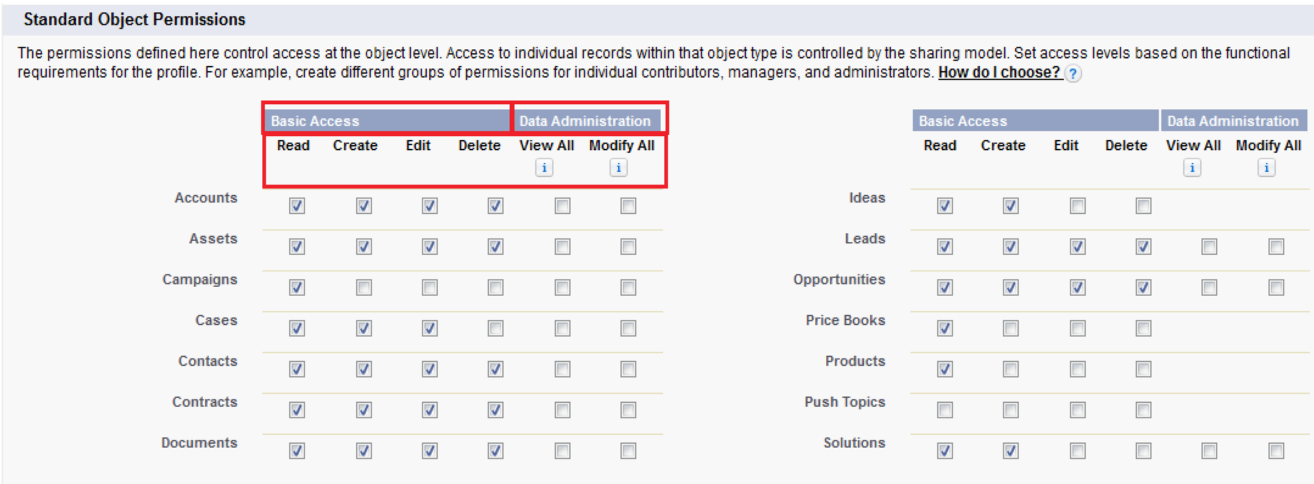
Home	Default On	Groups	Default On
Accounts	Default On	Ideas	Default On
App Launcher	Tab Hidden	Leads	Default On
Campaigns	Default On	Libraries	Default On
Cases	Default On	Opportunities	Default On
Chatter	Default On	People	Default On
Console	Tab Hidden	Price Books	Default Off
Contacts	Default On	Products	Default On
Content	Default On	Profile	Default On
Contracts	Default On	Profile Feed	Default On
Dashboards	Default On	Profile Overview	Default On
Data.com	Default Off	Reports	Default On
Documents	Default On	Site.com	Default On
Files	Default On	Solutions	Default On
Forecasts	Tab Hidden	Subscriptions	Default On

Custom Tab Settings

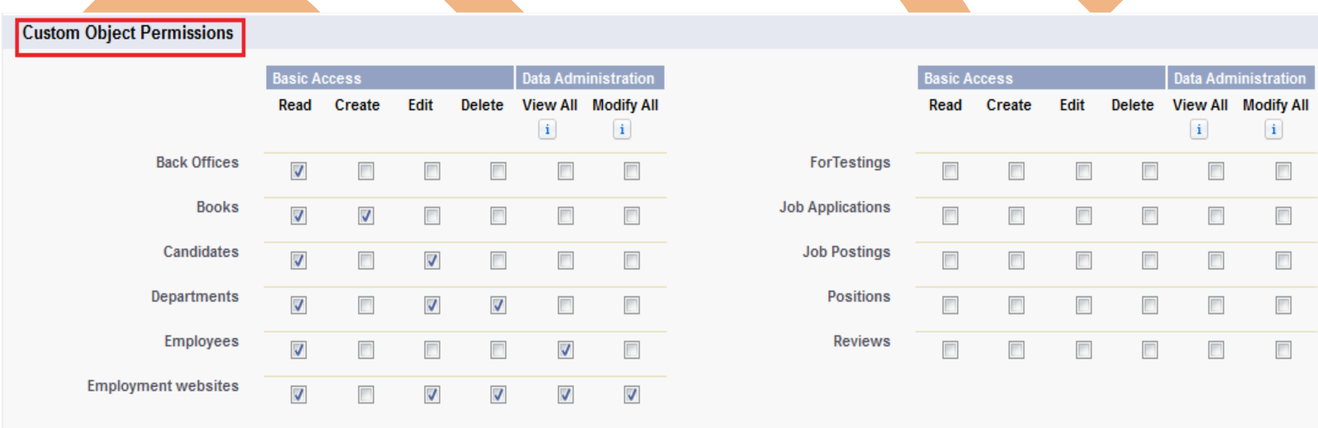
Back Offices	Default On	Employment websites	Default On
Departments	Default On	Job Applications	Default On
Employee List	Default On	Positions	Default On
Employees	Default On	wiki	Default On

Object permissions :

Standard Object Permissions : The permissions defined here control access at the object level.
you can set permission for Standard Object Permission there is you can only check or uncheck check box for give to permission.



Custom Object Permissions :
In Custom Object Permission by default all check box unchecked you can checked and give permission.



Permission	Description
Read	Users can only view records of this type.
Create	Users can read and create records.
Edit	Users can read and update records.
Delete	Users can read, edit, and delete records
View All	Users can view all records associated with this object, regardless of sharing settings.
Modify All	Users can read, edit, delete, transfer, and approve all records associated with this object,

	regardless of sharing settings.

Field-Level Security

you can also give Field-Level Security in user profile in user profile on non-editable page scroll down you can find Field-Level security.

There is available Standard Field Level Security, Custom Field Level Security, In Standard Field Level Security create permission on create account by SalesForce.com. You can change on Custom Field Level Security Click on **View** Link then open new page. For Ex :- I have select Candidate Field. you can see below.

Field-Level Security

Standard Field-Level Security

Account	[View]	Lead	[View]
Asset	[View]	Opportunity	[View]
Campaign	[View]	Opportunity Product	[View]
Campaign Member	[View]	Price Book	[View]
Case	[View]	Product	[View]
Contact	[View]	Social Persona	[View]
Contract	[View]	Solution	[View]
Event	[View]	Task	[View]
Idea	[View]	User	[View]

Custom Field-Level Security

Back Office	[View]	ForTesting	[View]
Book	[View]	Job Application	[View]
Candidate	[View]	Job Posting	[View]
Department	[View]	Postion	[View]
Employee	[View]	Review	[View]
Employment website	[View]		

Step 1 :-

Click on **Edit** button.

Candidate Field-Level Security for profile

Recruiter

Help for this Page

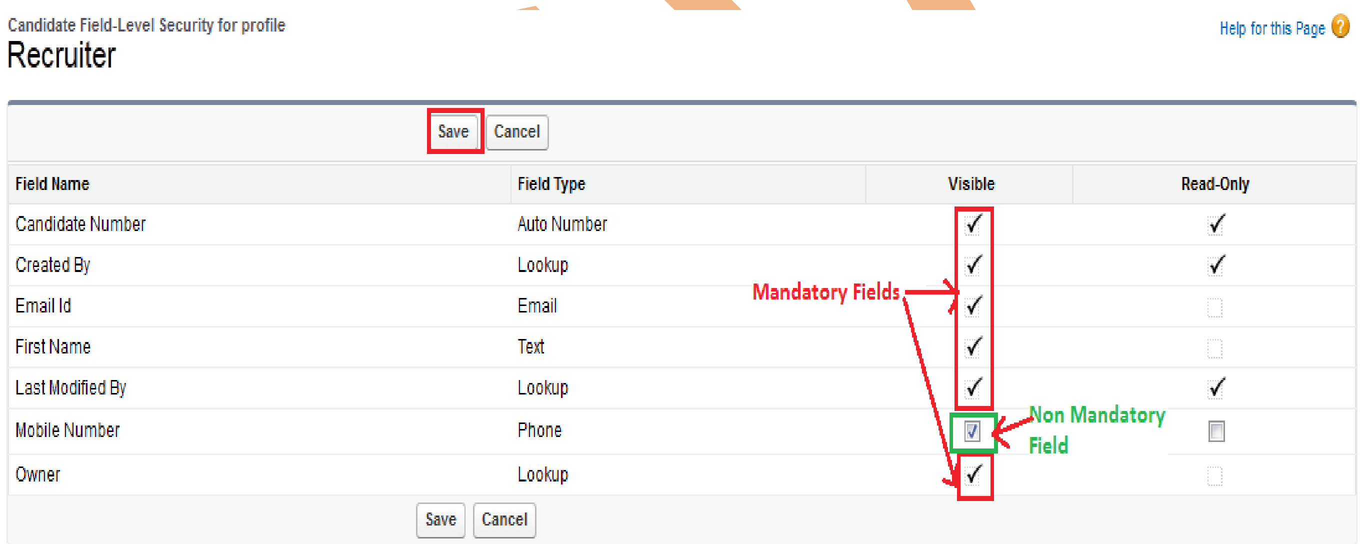
Edit | Back to Profile

Field Name	Field Type	Visible	Read-Only
Candidate Number	Auto Number	✓	✓
Created By	Lookup	✓	✓
Email Id	Email	✓	
First Name	Text	✓	
Last Modified By	Lookup	✓	✓
Mobile Number	Phone	✓	
Owner	Lookup	✓	

Edit | Back to Profile

Step 2 :-

There is some check box only not visible editable because these check box are Mandatory Fields.
and some check box is visible this check box Non Mandatory field.
In Non Mandatory Field you can provide permission Read-Only, Visible. you can choose it.



Field Name	Field Type	Visible	Read-Only
Candidate Number	Auto Number	✓	✓
Created By	Lookup	✓	✓
Email Id	Email	✓	
First Name	Text	✓	
Last Modified By	Lookup	✓	✓
Mobile Number	Phone	☑	☐
Owner	Lookup	✓	

Login Hours :

SalesForce provide to you Login history features, You can set login hours in organization Start or end time .

OR

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.

How to Set Login hours :

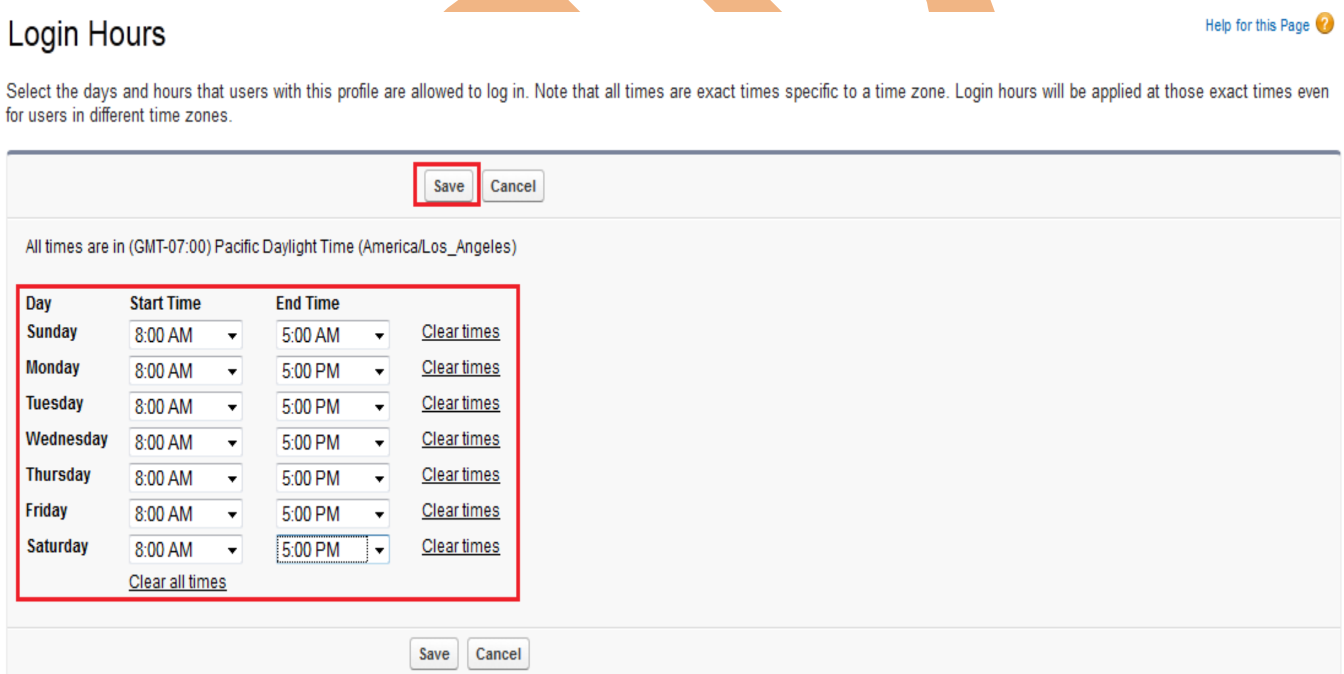
Setup -> **Mange users** -> **Profile** Select profile name (Ex:- Recruiter)(which want do you need).
After then come to down on page there is you can find **Login hours**. see below

Step 1 :-

After that click on **Edit** button. then you can see new page below.

Step 2 :-

In this page you can set Start or End time by day, After that select login hours click on **Save** button.



After click on save button you can see your login hours detail on profile page see below.
There is you can Edit this login hours and also Delete this login hours.

Login Hours Edit Delete Login Hours Help

Day	Start Time	End Time
Sunday	8:30 PM IST	5:30 AM IST
Monday	8:30 PM IST	5:30 AM IST
Tuesday	8:30 PM IST	5:30 AM IST
Wednesday	8:30 PM IST	5:30 AM IST
Thursday	8:30 PM IST	5:30 AM IST
Friday	8:30 PM IST	5:30 AM IST
Saturday	8:30 PM IST	5:30 AM IST

Login IP Ranges

SalesForce gives to you Login IP Ranges option, Enter the range of valid IP addresses from which users with this profile can log in.

How to Set Login hours :

Setup -> **Mange users** -> **Profile** Select profile name (Ex:- Recruiter)(which want do you need).

After then come to down on page there is you can find **Login IP Ranges** . see below

Step 1 :-

Click on **New** button for create Login IP Ranges.

Login IP Ranges New Login IP Ranges Help

No login IP ranges specified. Users from any IP address are allowed to log in.

Step 2 :-

There is you can see two fields, Start IP Address and End IP Address, You can give IP address, which IP address allow to user for login.

Note :-

For Single IP Address :

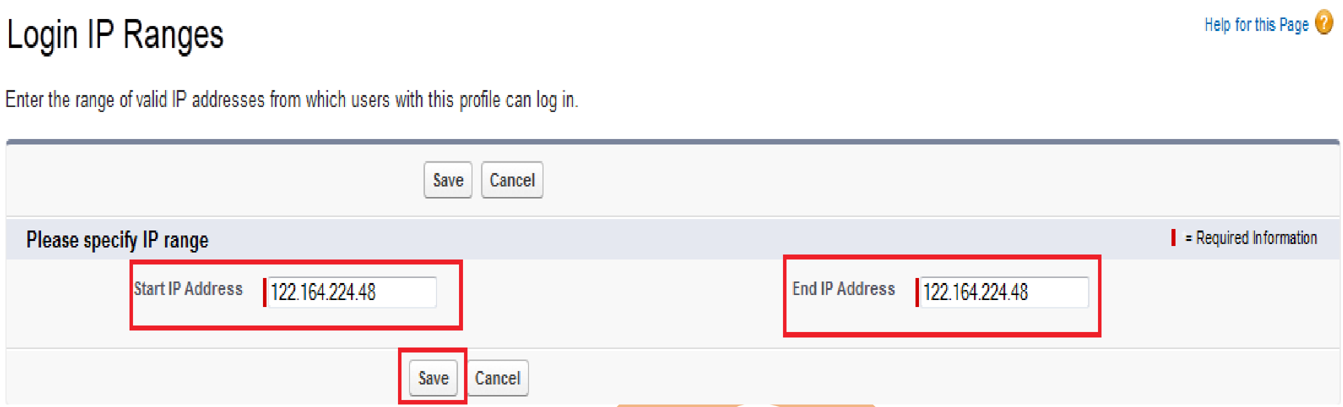
If you want to set single IP address, give this type.

Start IP Address 122.164.224.48	**End IP Address** 122.164.224.48

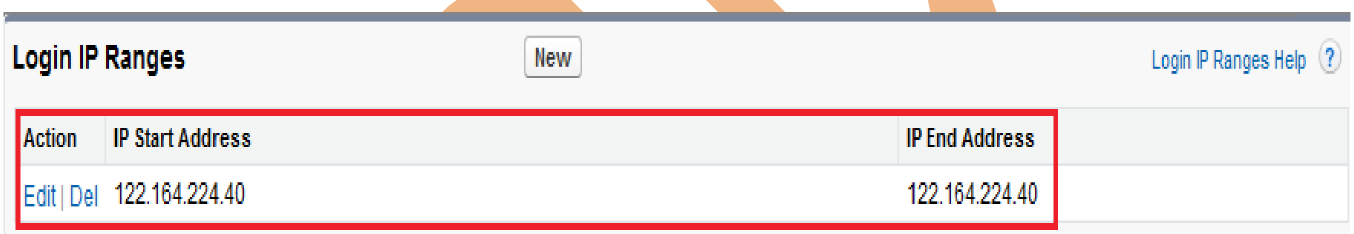
For One to More Range IP Address :

If you want to Set One to More Range IP address, give this type

Start IP Address 122.164.224.48	**End IP Address** 122.164.224.59



After click save button then you can see your IP address on profile setting page, see below.

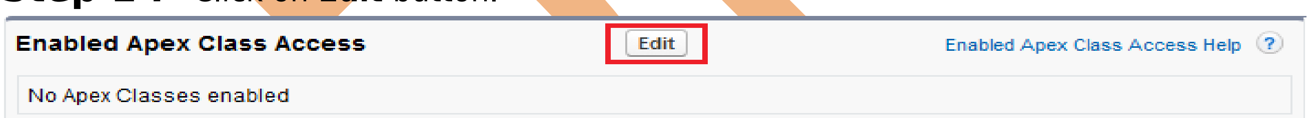


Enabled Apex Class Access

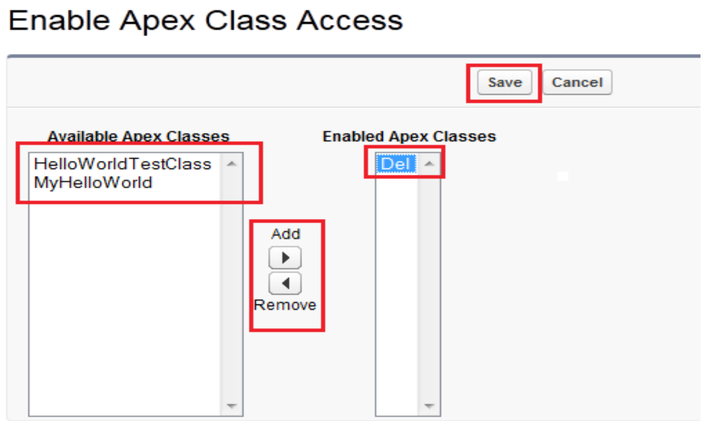
Setup -> **Mange users** -> **Profile** Select profile name (Ex:- Recruiter)(which want do you need).

After then come to down on page there is you can find **Enable Apex class Access** . see below

Step 1 :- Click on **Edit** button.



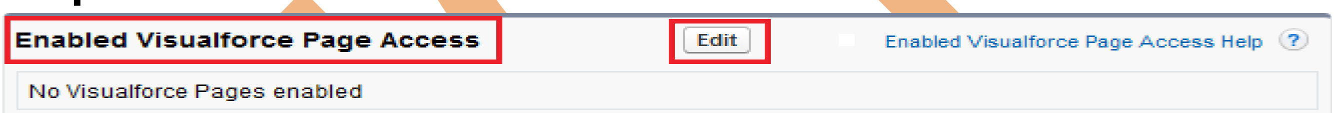
Step 2 :- Select Available Apex Classes then click on **Add** button after that click on **Save** button.



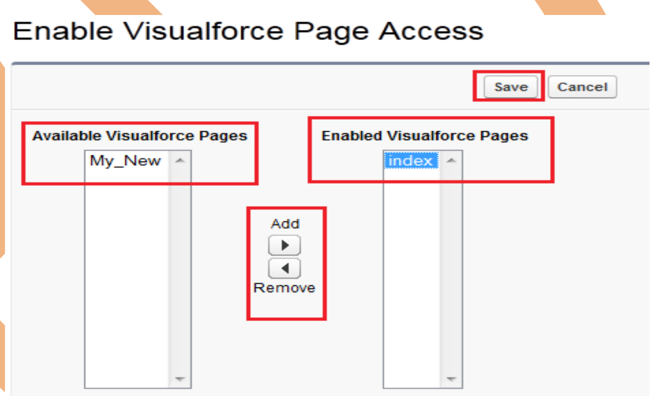
Enabled VisualForce Page Access

Setup -> **Mange users** -> **Profile** Select profile name (Ex:- Recruiter)(which want do you need).
After then come to down on page there is you can find **Enable VisualForce page Access** . see below

Step 1 :- Click on **Edit** button.

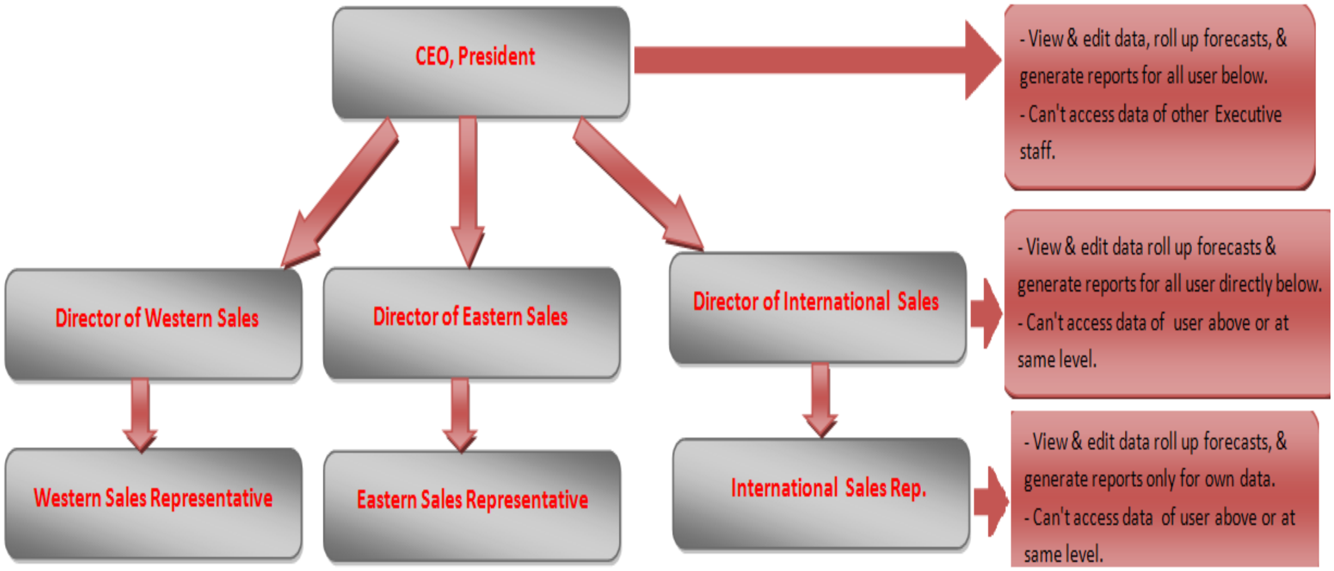


Step 2 :- Select Available VisualForce Pages then click on **Add** button after that click on **Save** button



Roles

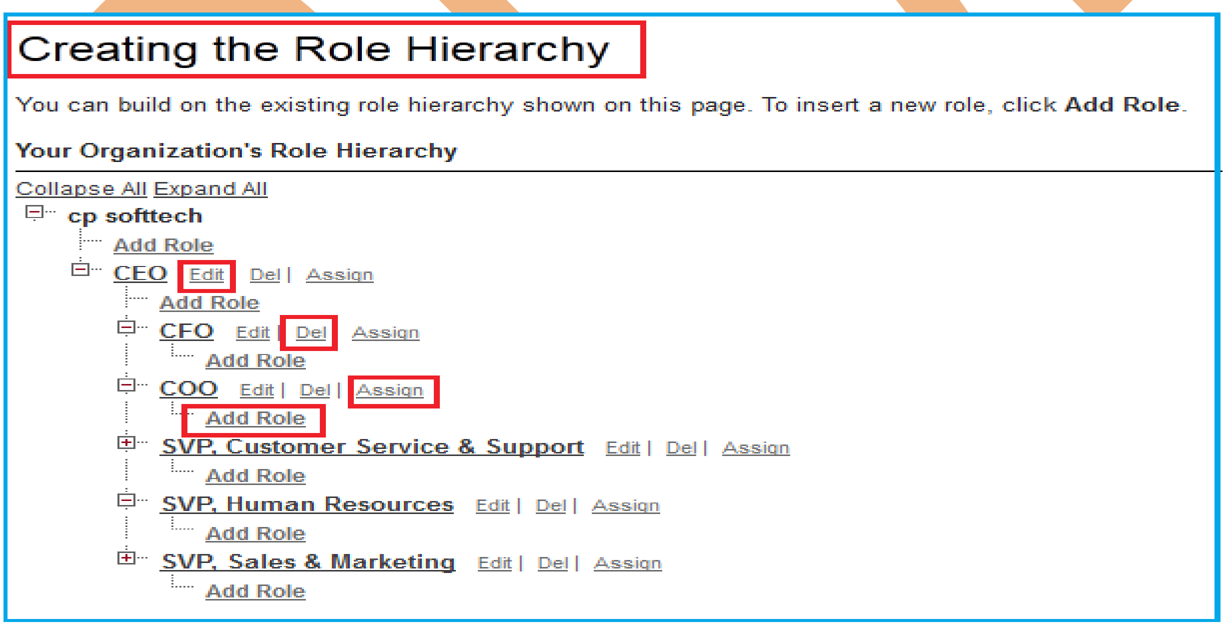
By using SalesForce.com you can Set in your organization Roles. Roles are one of the ways you can control access to records. Set up your Role Hierarchy to control how your organization reports on and accesses data.



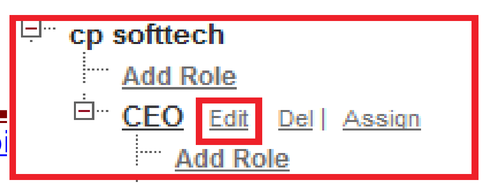
How to Set Rules

Click **Setup** -> **Manage user** -> **Rules** then click on **<u>Set Up Rules</u>** button . see below.

There you can see that your organization role hierarchy , here you can <u>Edit role</u> , <u>Delete Role</u> and <u>Add Role</u>.



Edit Role :

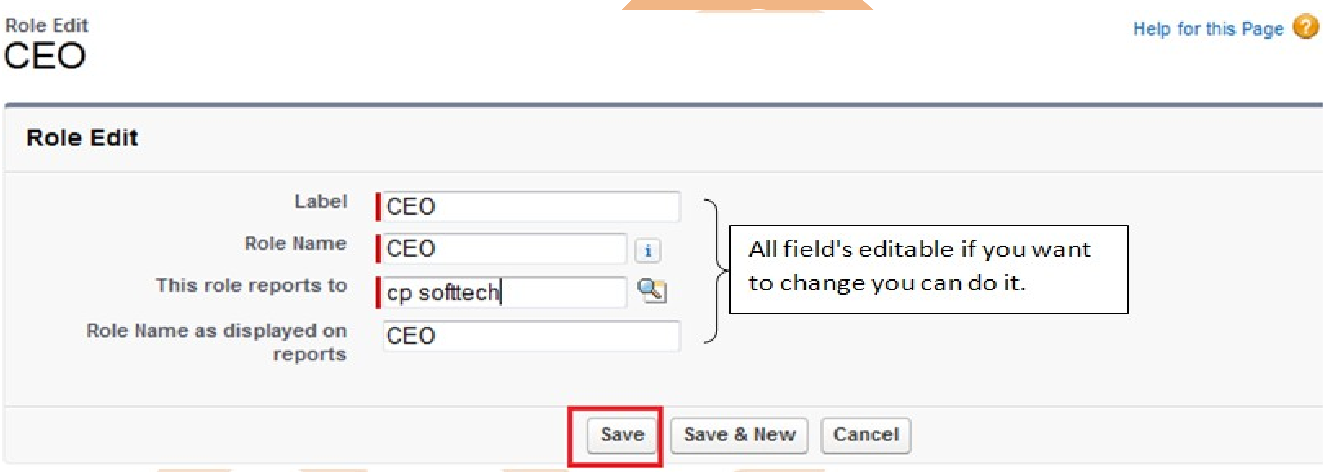


Step 1 :-

Click on Edit link for Editing role.

Step 2 :-

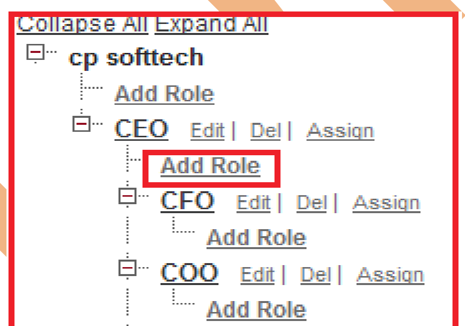
if you need to change field's name you can do it. after that click on **Save** button.



Add Role :

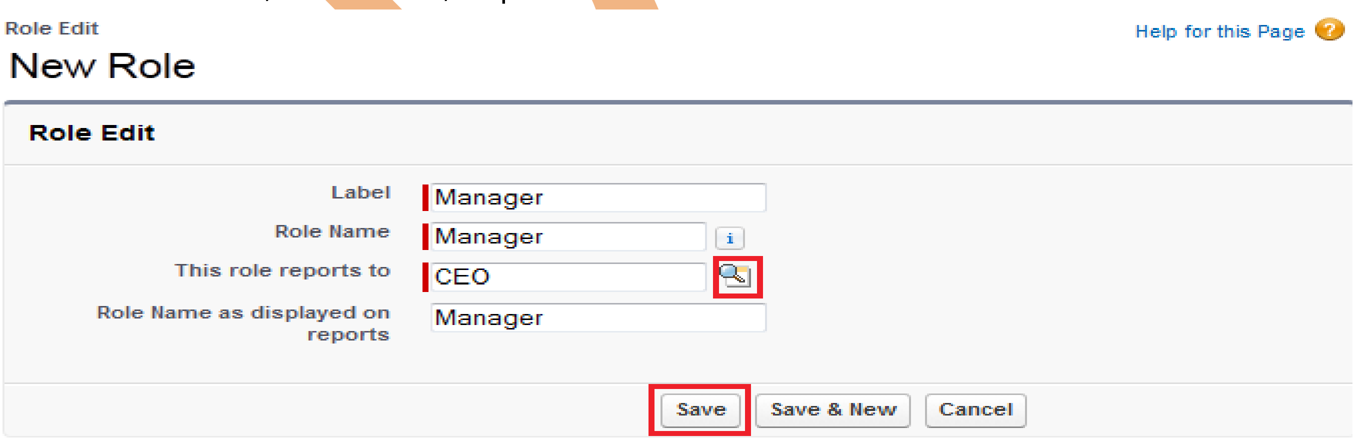
Step 1 :-

Click on Add Role link for Editing role.

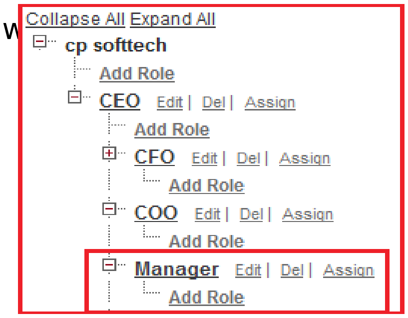


Step 2 :-

Fill all fields Label, Role Name, Report to then click on **Save** button.



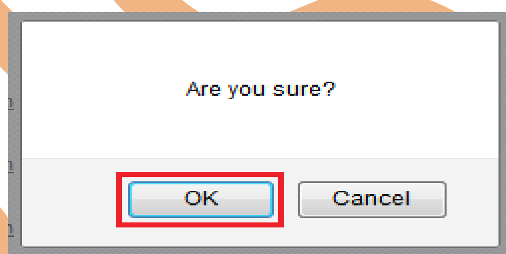
After that you can see the Role Hierarchy list Manager w



Delete Role :-

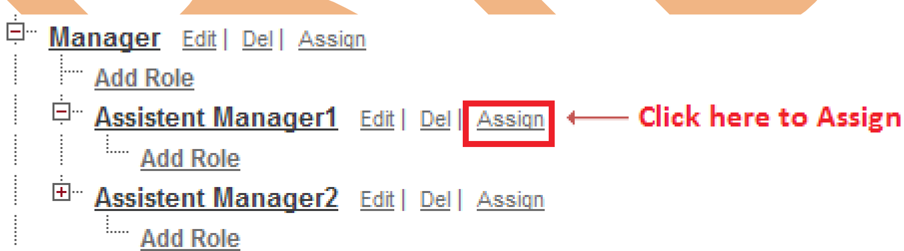
By using **Delete** link you can delete Role in hierarchy.

Click on Del link button you can get conformation Message click ok button you can delete Role.

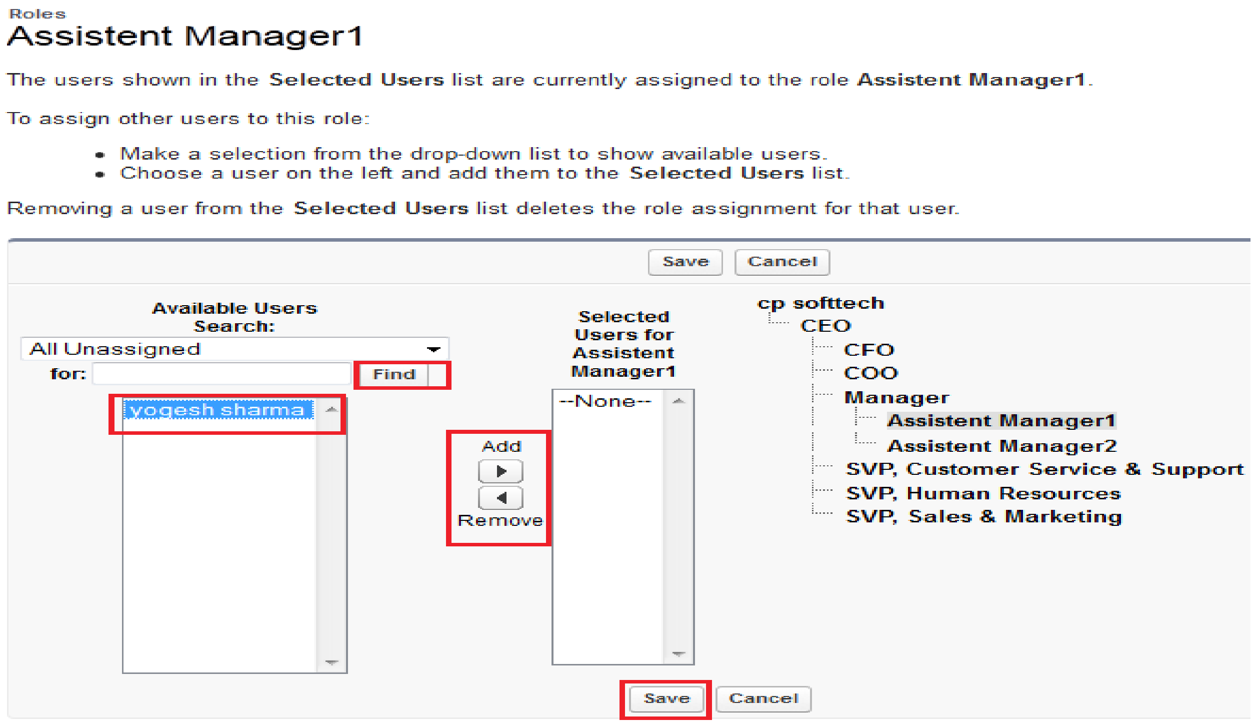


Assign Role :-

First you can click on **Assign** link .

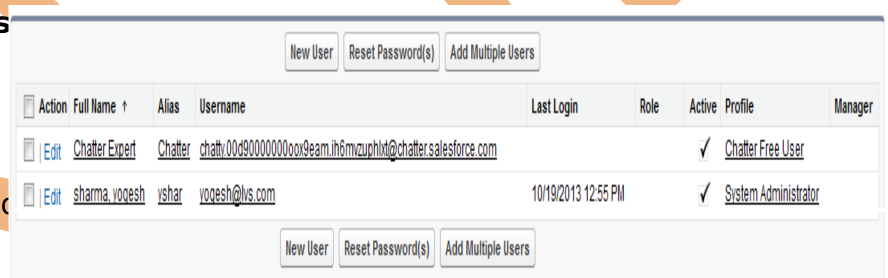


Then select user name which on you assign, after select user name click on **Add** button then click on Save button. You can also Find user in available users.



View And Managing User

To Create, view and manage the users in your organization. The user list shows all the users in your organization, and SalesForce Customer Portal.
Setup -> **Manage user** -> **Us**

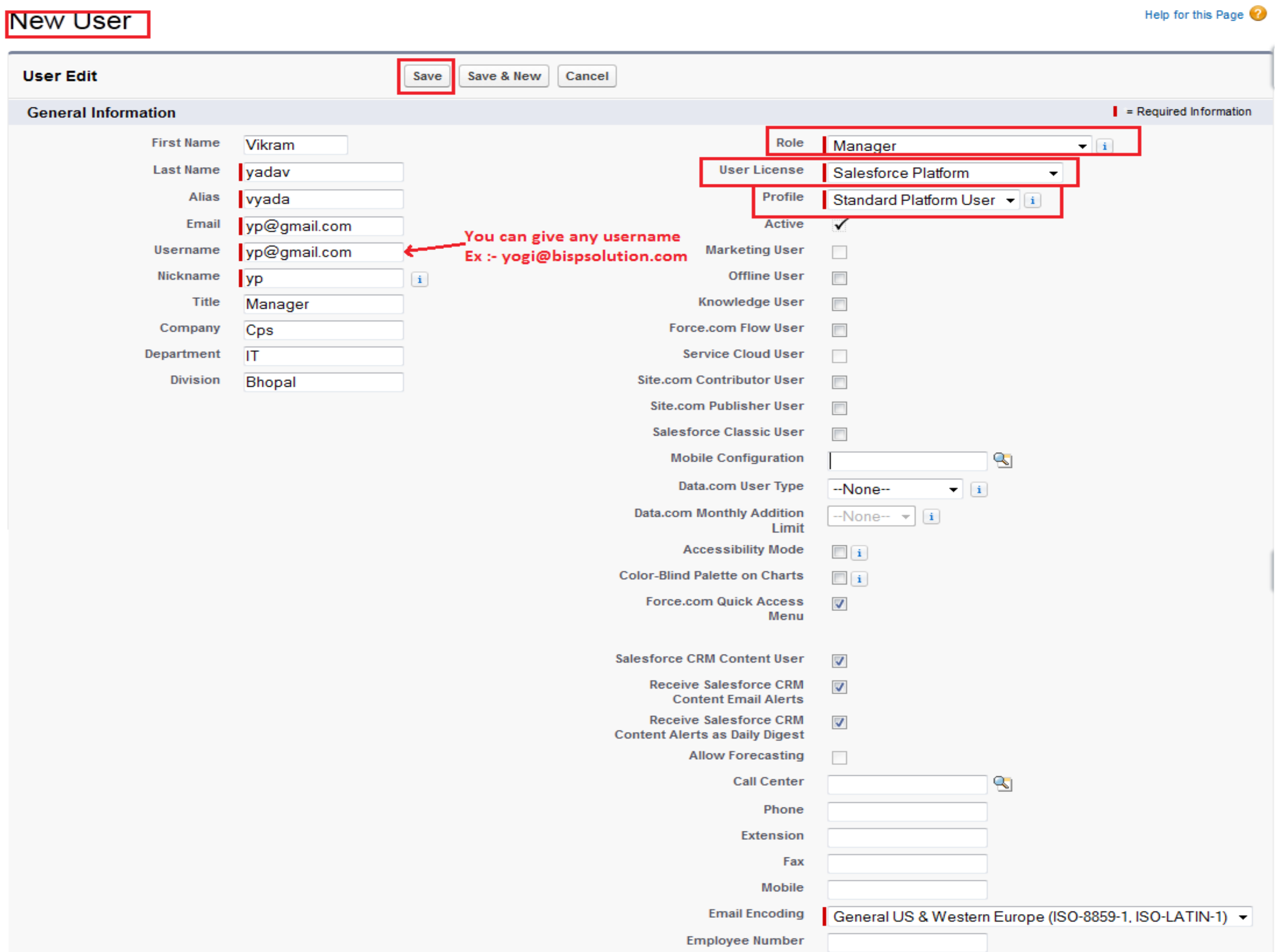


There Is Four Option :

1. Create one user.
2. Create multiple users.
3. Reset passwords for selectec
4. Edit a user.

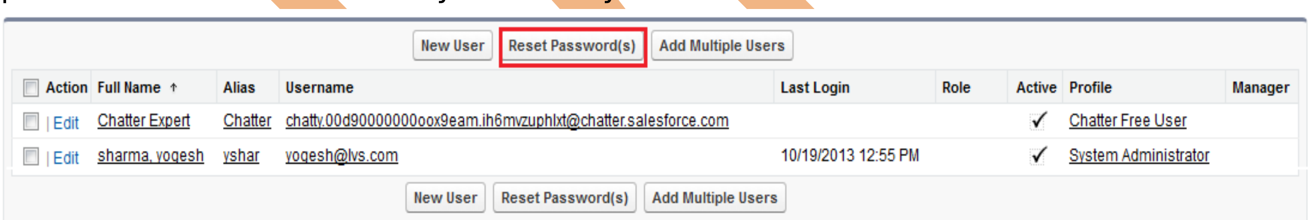
1. Create one user

You can create new user for you organization. click on **New User** button. see below.
From **Setup** -> click **Manage Users** -> **Users**. Click **New User button.**
Fill all the fields, you can give any user name, select role, select user license, and select profile Select the other options and enter the remaining user information as needed and click on **Save** button.
In this mail id come to conformation mail by SalesForce check your mail id.



2. Reset Password for selected users

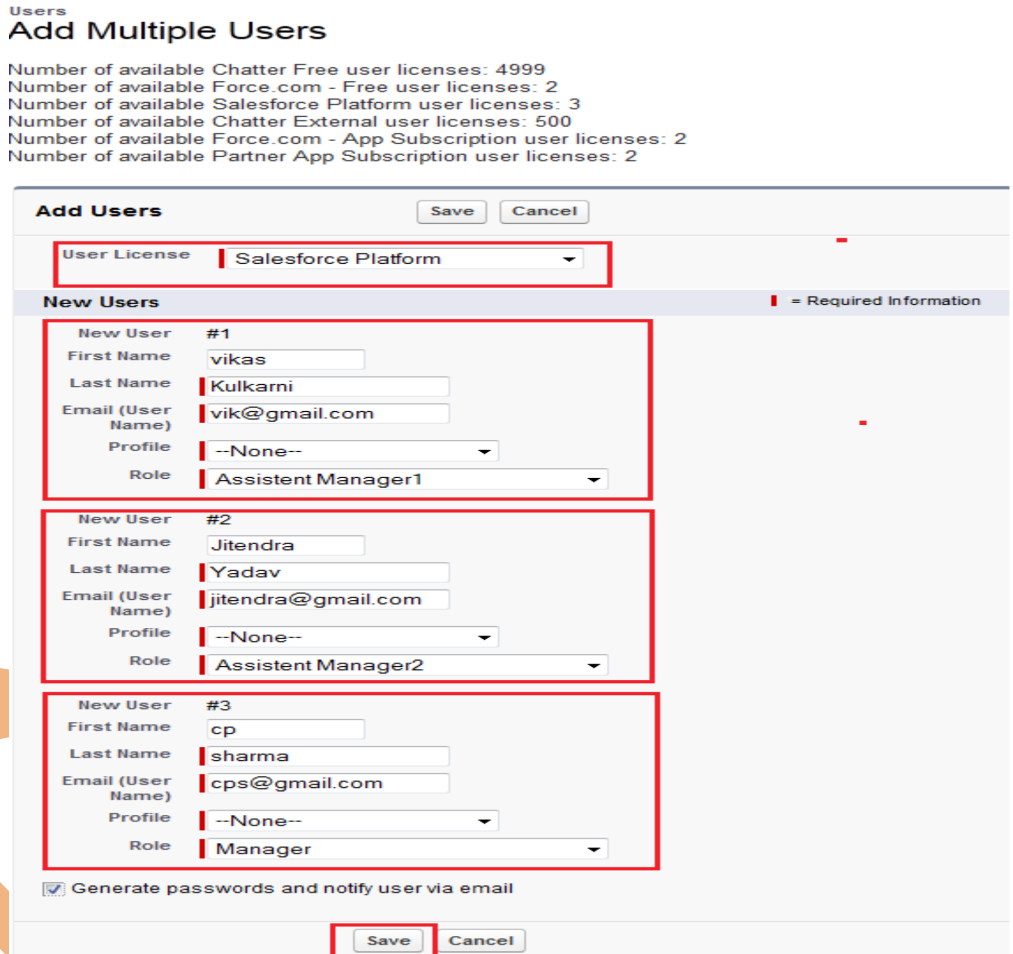
Click on Reset Password button then SalesForce send to you Reset password link click on this and change reset you password and After change pass you can reset you password SalesForce send to you Security Token also.



Action	Full Name ↑	Alias	Username	Last Login	Role	Active	Profile	Manager
Edit	Chatter Expert	Chatter	chatty.00d90000000oox9eam.ih6mvzuphlxt@chatter.salesforce.com			✓	Chatter Free User	
Edit	sharma, yogesh	yshar	yogesh@lvs.com	10/19/2013 12:55 PM		✓	System Administrator	

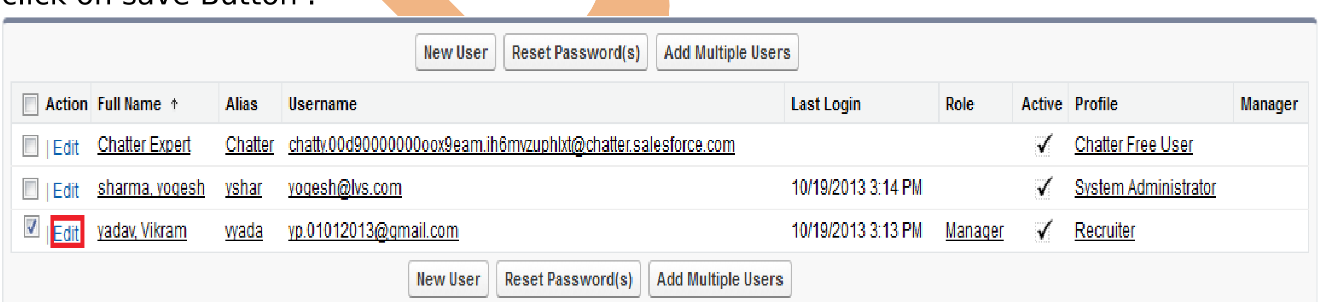
3. Create multiple users

The Add Multiple Users SalesForce provides a way to quickly add users to your organization. Depending on the number of available licenses, you can create up to 10 users. With this page this depend on license , you specify the minimum information needed.



4. Edit a user

Select User and click on edit link button. for Update information fill update Field and click on save Button .



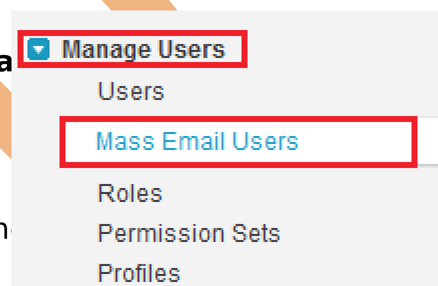
Mass Email Users

You can send a mass email(bulk email) message to a available list that consists of contacts, leads, person accounts, or users you can view in SalesForce.com .

User permission Needed	
To send mass emails to contacts, person accounts, leads	Mass Email
To send mass emails to use	Mass Email and Manage Users
To send mass emails and log them in the active history related	Mass Email And Edit Tasks

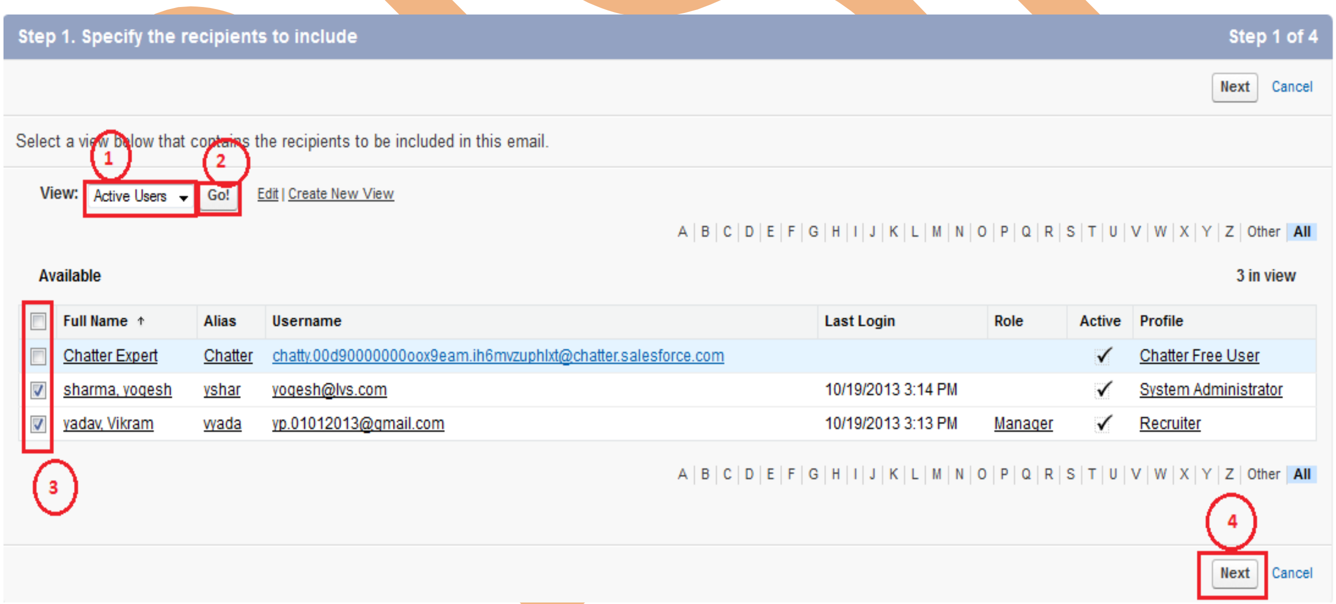
How To Send Mass Email :

From **Setup** -> click **Manage Users** -> **Mass Ema**

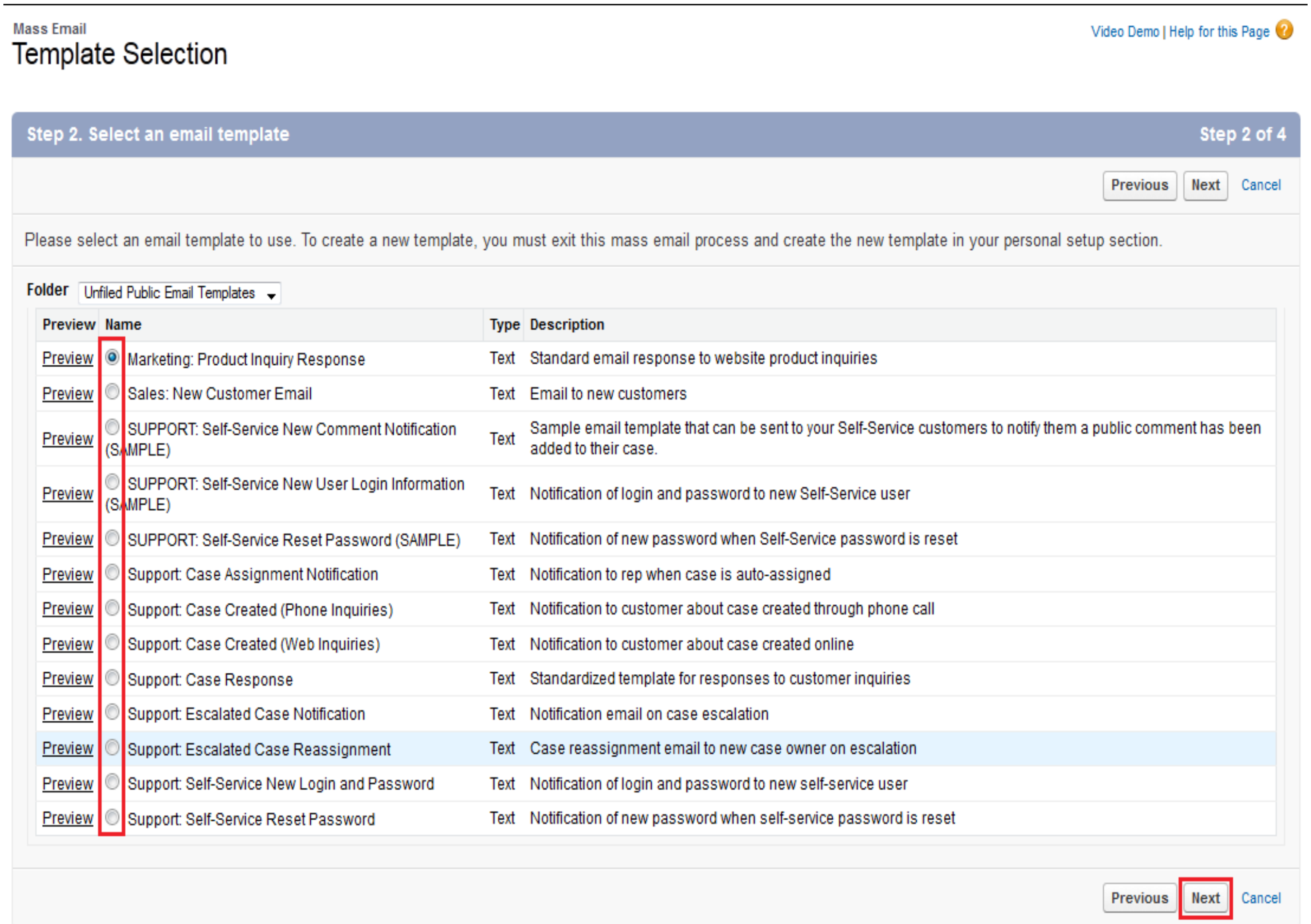


Step 1 :-

1. click on Dropdown and select user which want sen
2. After select user click on **Go** button.
3. Checked check box for select user list for sending Mass email.
4. Click on **Next** button.



Step 2 :- Select Email Format Template and click on **Next** button. Click on Preview lick you can template preview.



Step 3 :-

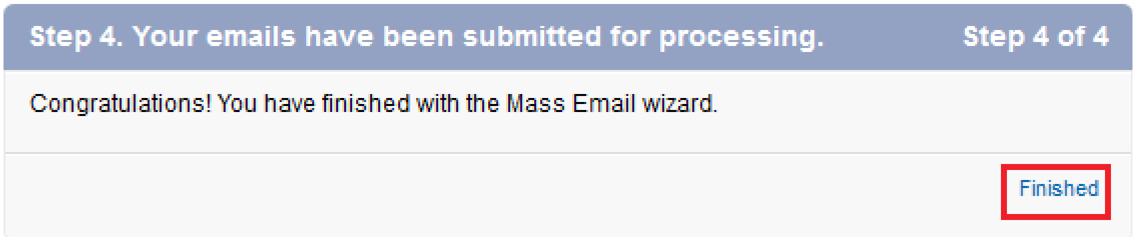
Give Email Name, There is two type Delivery option available

(I) Send Now : If choose this option and click to **send** button, mail send Immediately

(II) Schedule for delivery on : Select this option you can schedule your mail which time or date you want to send mail.

Step 4 :-

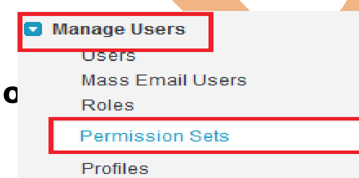
After that show new page, this page show email successfully submitted for processing , click on Finished **link** button.



Permission Sets in SalesForce

Permission Sets are a group of settings and permissions that extend what a user can do beyond what their profile allows. The settings and permissions in permission sets are also found in profiles, but permission sets extend users' functional access without changing their profiles.
It is also very easy to add or remove a permission set for a given user.

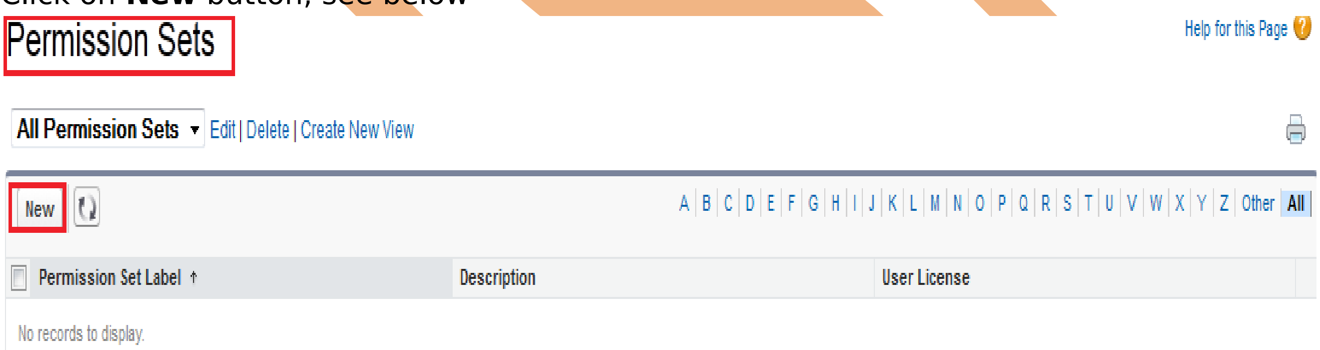
How to set permission



Setup -> **User Manager** -> **Permissio**

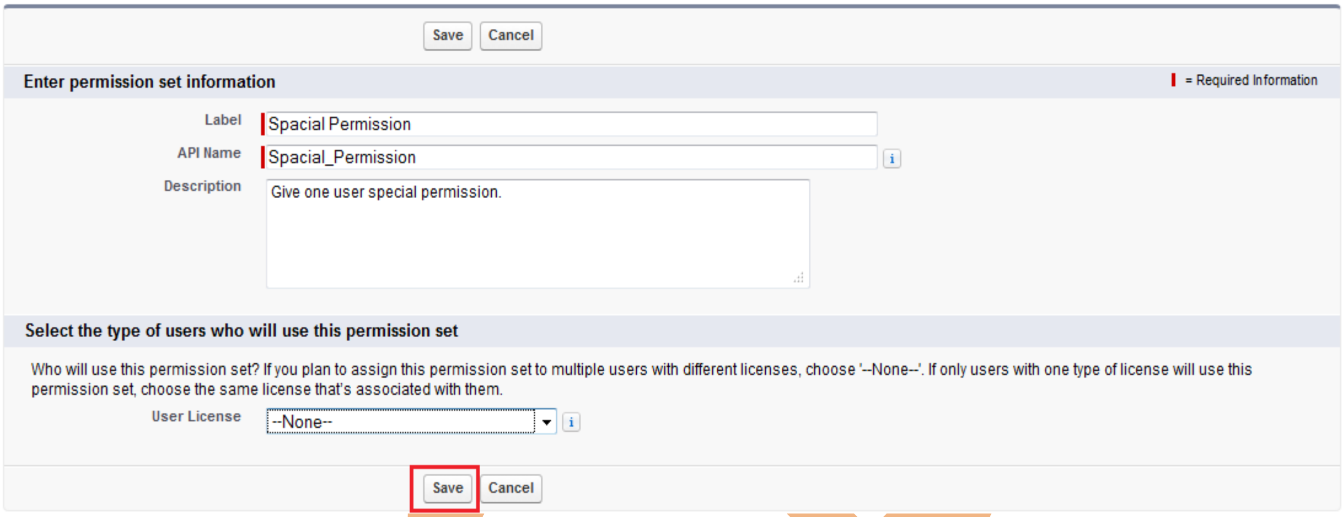
Step 1 :-

Click on **New** button, see below



Step 2:-

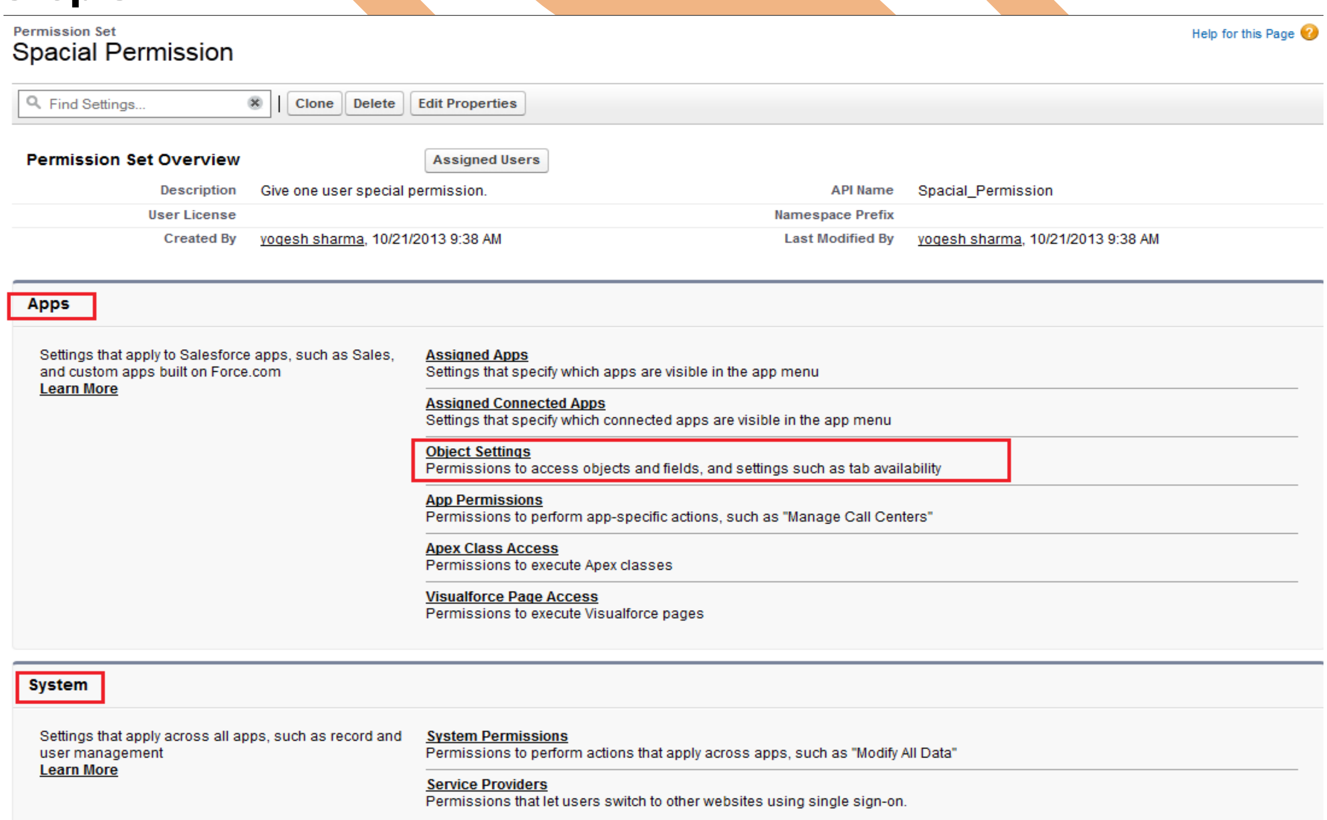
Give your permission set a label and API Name. Give your permission set a description so you know exactly what the permission set gives access to. Then choose the correct type of license you're creating the permission set for Then Click on **Save** button.



Note: If you think to assign this permission set to multiple users with different licenses, choose '--None--'.

If assign only one users license will use this permission set, choose the same license that’s associated with them.

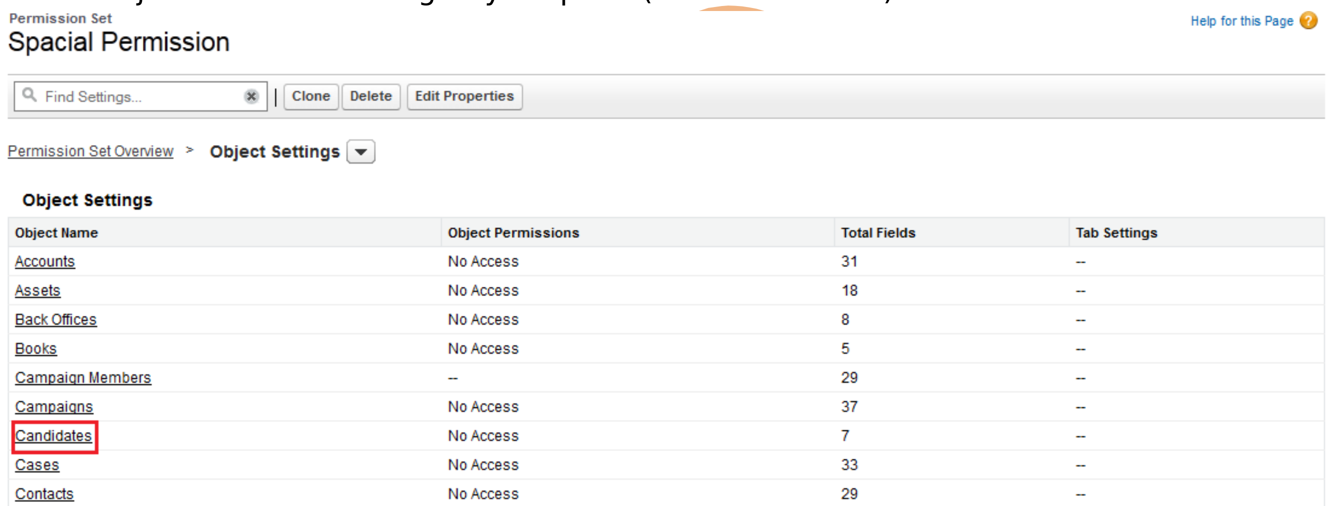
step 3 :-



After saved the permission set name and description, then start adding permissions. Permissions are divided by app permissions and system permissions. You can give permission for assigned apps, object settings, app permissions, apex class access, VisualForce page access and system permissions. Depending on what license type you chose for the permission set.
I will select Object setting.

Step 4 :-

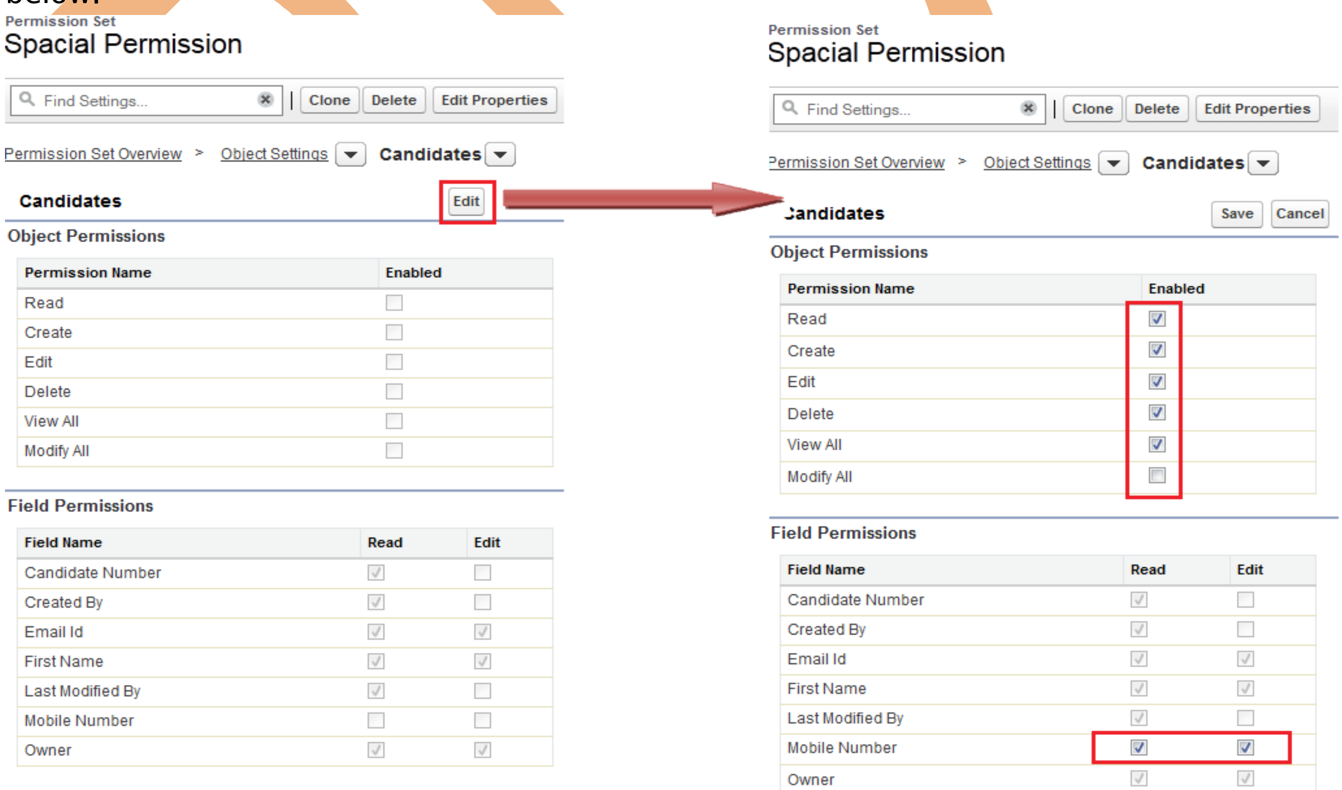
Select object name according to your plan. (ex:- Candidates).



Object Name	Object Permissions	Total Fields	Tab Settings
Accounts	No Access	31	--
Assets	No Access	18	--
Back Offices	No Access	8	--
Books	No Access	5	--
Campaign Members	--	29	--
Campaigns	No Access	37	--
Candidates	No Access	7	--
Cases	No Access	33	--
Contacts	No Access	29	--

Step 5 :-

Click on Edit button, then open new page in this page you can set permission see below.



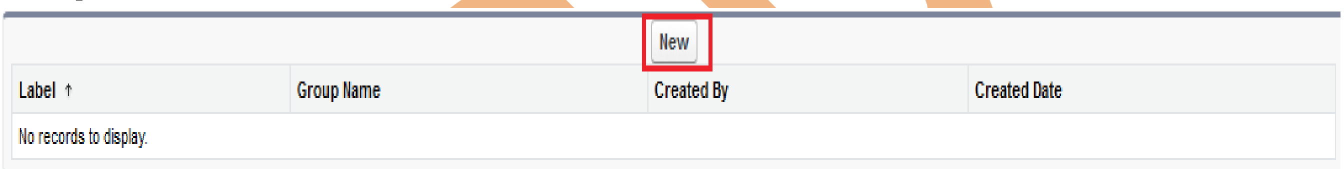
Public Groups

A public group is a set of users. It can contain individual users, other groups, the users in a particular role or territory, or the users in a role or territory plus all of the users below that role or territory in the hierarchy.

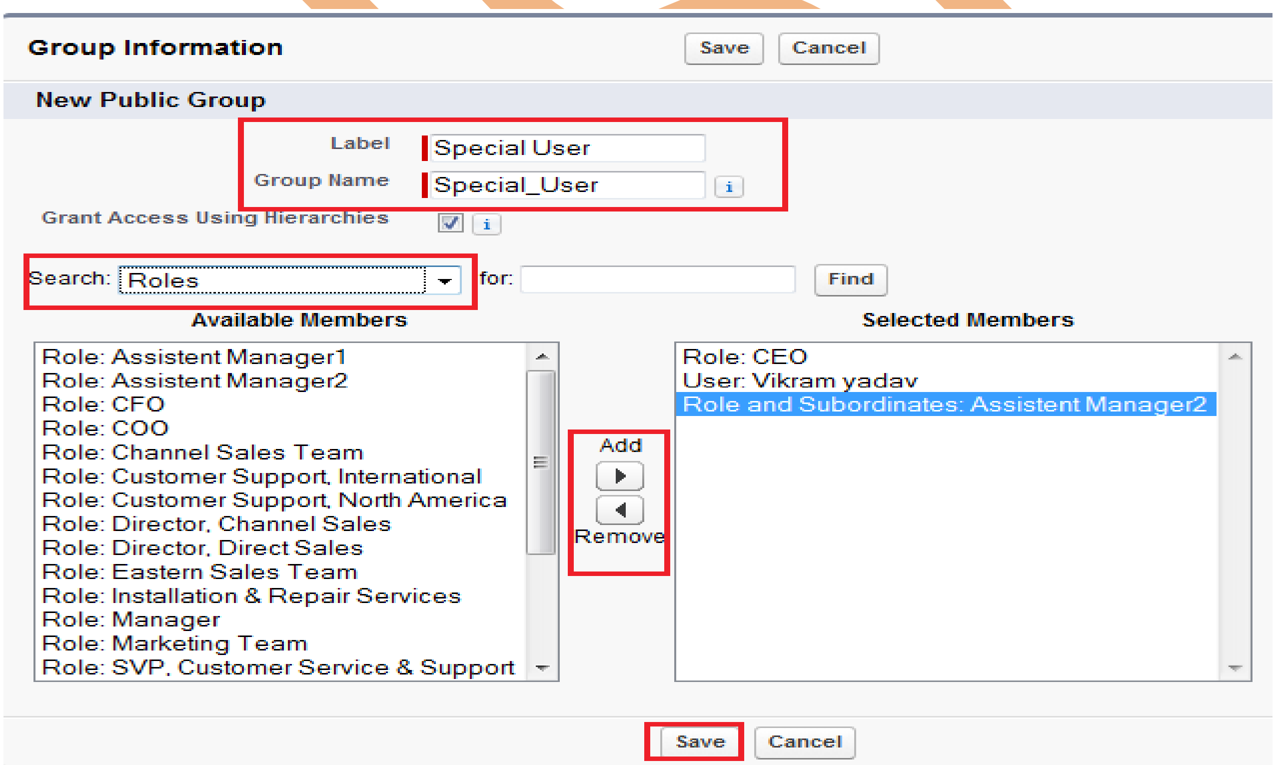
How to set permission

Setup -> **User Manager** -> **Public Groups**

Step 1 :- Click on New button. for create Public group.



Step 2 :-



Give your New public group label and Group Name. by using search option select multiple member click to **Add** button for adding members. then click to **Save** button.

Queues

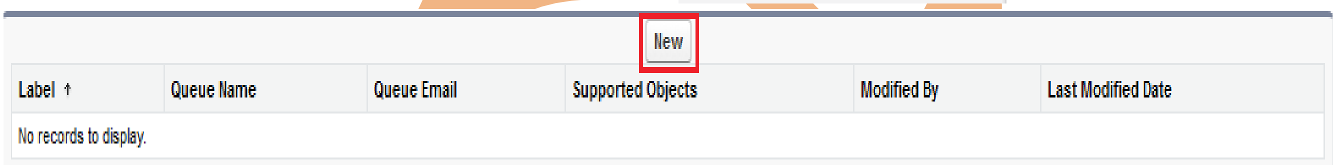
Queues help your teams manage lead, service contracts, cases, and custom objects. When records are placed in a queue manually or through an automatic case or lead assignment rule, records remain there until they're assigned to a user or taken by one of the queue members. Any queue member or users above them in the role hierarchy can take ownership of records in a queue.

Create Queues :

Setup -> **User Managers** -> **Queues**

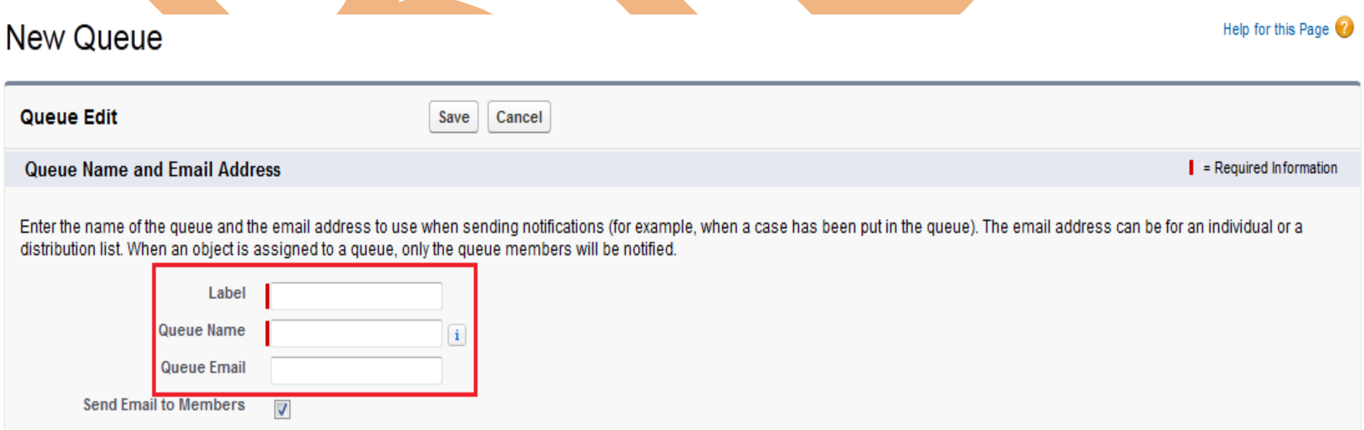
Step 1 :-

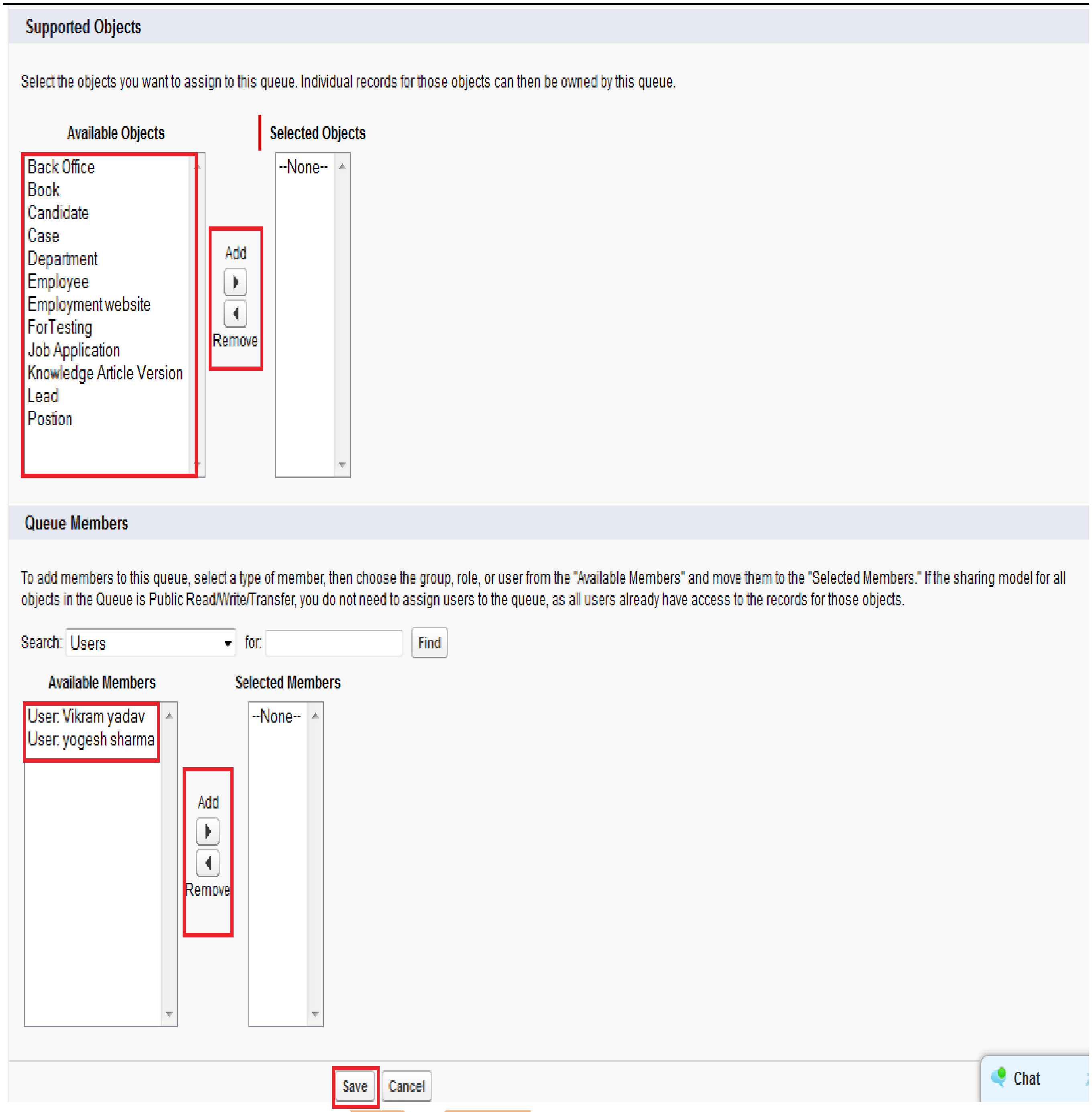
Click on **New** button.



Step 2 :-

- Enter the Label and Queue Name. Queue Name is a unique name used by the API and managed packages, and can only contain alphanumeric characters and underscores.
- Choose email notification settings for the queue.
- Choose the objects available to the queue.
- Choose queue members.
- After that click **Save** button.





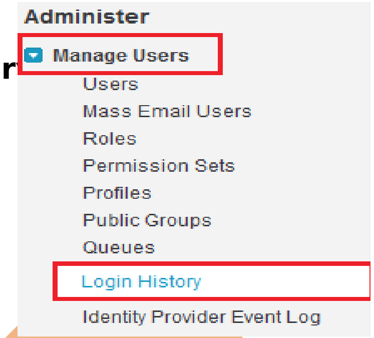
Login History

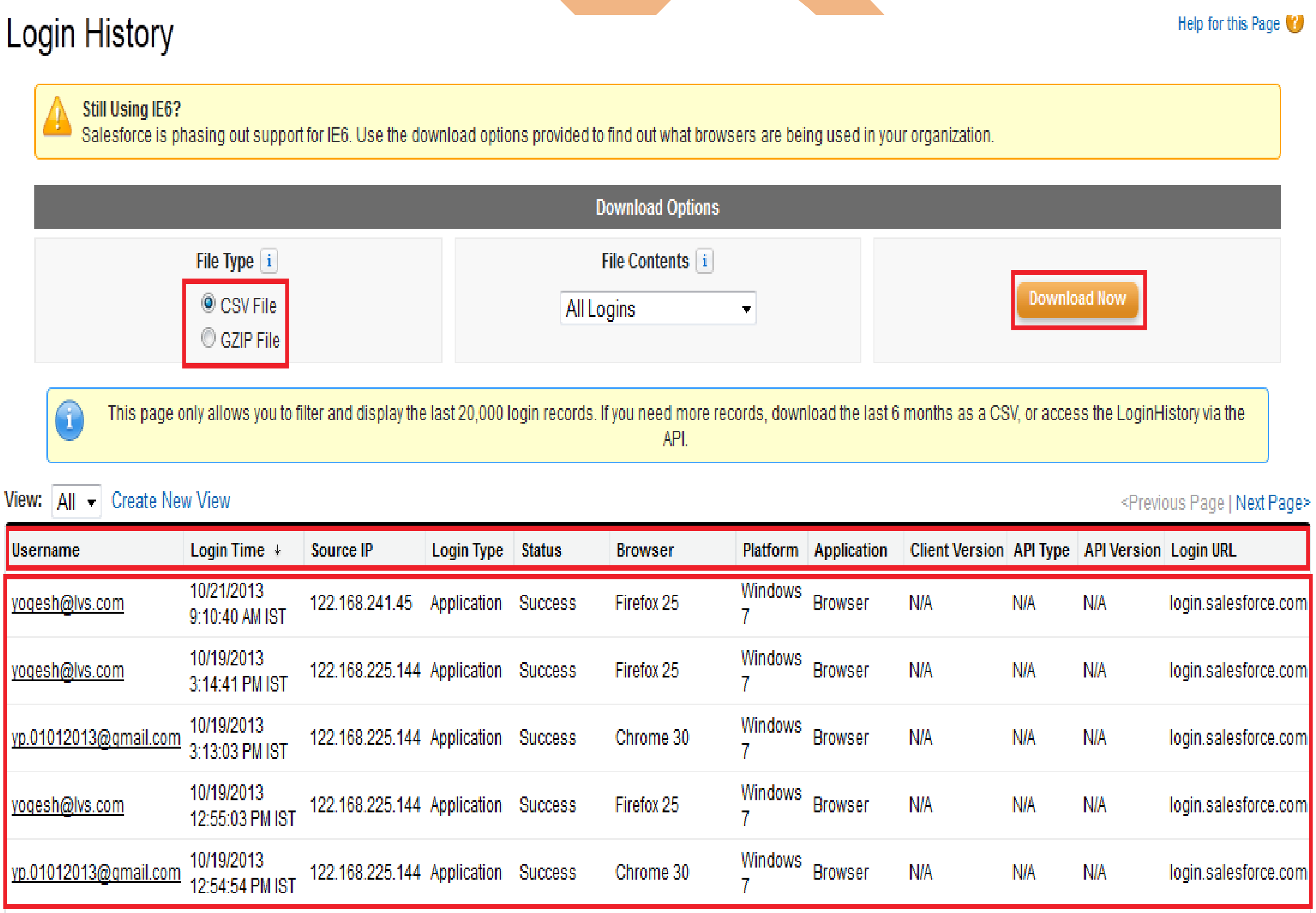
By using Login History you can see Login history of user. you can some detail Username, Login Time, Source IP, Login IP, Login Type, Status, Browser, Platform, Application, Client Version, API type, API Version, Login URL.

And you can also take last 6 month login history back in .CSV File or .GZIP File. click on **download** button.

How to Get Login History

Setup -> Manage Users -> Login histor





Username	Login Time	Source IP	Login Type	Status	Browser	Platform	Application	Client Version	API Type	API Version	Login URL
yogesh@lvs.com	10/21/2013 9:10:40 AM IST	122.168.241.45	Application	Success	Firefox 25	Windows 7	Browser	N/A	N/A	N/A	login.salesforce.com
yogesh@lvs.com	10/19/2013 3:14:41 PM IST	122.168.225.144	Application	Success	Firefox 25	Windows 7	Browser	N/A	N/A	N/A	login.salesforce.com
yp.01012013@gmail.com	10/19/2013 3:13:03 PM IST	122.168.225.144	Application	Success	Chrome 30	Windows 7	Browser	N/A	N/A	N/A	login.salesforce.com
yogesh@lvs.com	10/19/2013 12:55:03 PM IST	122.168.225.144	Application	Success	Firefox 25	Windows 7	Browser	N/A	N/A	N/A	login.salesforce.com
yp.01012013@gmail.com	10/19/2013 12:54:54 PM IST	122.168.225.144	Application	Success	Chrome 30	Windows 7	Browser	N/A	N/A	N/A	login.salesforce.com

There is you can see login history, select File Type and click on **Download** button and download last 6 month login history. and also check history on this page.