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Getting Started with SalesForce CRM

Security and Data Access in SalesForce CRM

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 basic keywords, terminology and definitions one should know before starting SalesForce Join our professional training program and learn from experts.

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	2
Restrict logins	3
Login hour restrictions :	
Login Hours :	3
Restricting Login IP Addresses :	4
Determine Object Access Security	6
Viewing the Object Access and Field-Level Security Report :	6
	6
Custom Object Security :	7
Manage record access with the role hierarchy	8
Roles :	8
How to Set Rules :	9
Permission Sets :	12
Exceptions	14
Manage field-level security	16
For View Field level Security :	17
Manage Field Level Security	18

Restrict logins

To help protect your organization's data against unauthorized access, you have several options for setting login restrictions.

Login hour restrictions :

If login hour restrictions are set for the user's profile, any login attempt outside the specified hours is denied. For each profile, you can set the hours when users can log in.

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	:-
	_	-

Login Hours	Edit	Login Hours Help 🕐
No login hours specified		

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.

Login Hours

Help for this Page 🕜

Select the days and hours that users with this profile are allowed to log in. Note that all times are exact times specific to a time zone. Login hours will be applied at those exact times even for users in different time zones.

					Save
All times are in	n (GMT-07:00)) Pacifi	: Daylight Time (/	Ameri	ca/Los_Angeles)
Day	Start Time		End Time		
Sunday	8:00 AM	•	5:00 AM	•	<u>Clear times</u>
Monday	8:00 AM	•	5:00 PM	•	<u>Clear times</u>
Tuesday	8:00 AM	•	5:00 PM	•	<u>Clear times</u>
Wednesday	8:00 AM	•	5:00 PM	•	<u>Clear times</u>
Thursday	8:00 AM	-	5:00 PM	•	Clear times
Friday	8:00 AM	•	5:00 PM	•	<u>Clear times</u>
Saturday	8:00 AM	•	5:00 PM	•	<u>Clear times</u>
	Clear all tim	es			
					Save Cance

After clicking on save button you can see your login hours detail on profile page see below.

There is you can Edit these login hours and also Delete these 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

Restricting Login IP Addresses :

User Permissions Needed				
View login IP ranges		View Setup and Configuration		
Edit login IP ranges		Manage Users		
Delete login IP ranges		Modify All Data		

You can control login access on a user's profile by specifying a range of IP addresses. When you define IP address restrictions for a profile, any login from a restricted IP address is denied.

How to Set Login IP Ranges :

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 :

No login IP ranges specified. Users from any IP address are allowed to log in.	Login IP Ranges	Nev	v	Login IP Ranges Help (
ttep 2 : here is you can see two fields, Start IP Address and End IP Address, You can give IP ddress, which IP address allow to user for login. tore :- or Single IP Address : you want to set single IP address, give this type. Start IP Address 122.164.224.48 End IP Address 122.164.224.48 or One to More Range IP Address : you want to Set One or More Range IP address, specify like this Start IP Address 122.164.224.48 End IP Address 122.164.224.49 ongin IP Ranges Rest the range of valid P addresses from which users with the profile can bg in Image: Image IP address I IP In IP Address IIP In In IP In In IP Address IIP In In IP In	No login IP ranges specified. Users	from any IP address are allo	wed to log in.		
here is you can see two fields, Start IP Address and End IP Address, You can give IP ddress, which IP address allow to user for login. Tor Single IP Address : you want to set single IP address, give this type. Start IP Address 122.164.224.48 End IP Address 122.164.224.48 or One to More Range IP Address : you want to Set One or More Range IP address, specify like this Start IP Address 122.164.224.48 End IP Address 122.164.224.59 ogin IP Ranges Her transport of which users with this profile can log in. Please specify IP range IV range IV address on profile setting page, see elow. ogin IP Ranges IV Login P Ranges Her Cancel fter click save button then you can see your IP address on profile setting page, see elow. ogin IP Ranges IV Login P Ranges Her Cancel Addin IP StartAddress IV Login P Ranges Her Cancel Addin IP StartAddress IV Login P Ranges Her Cancel Address IV Login P Ranges IV Login P Ranges Her Cancel Address IV Login P Ranges IV Login P Ranges Her Cancel Address IV Login P Ranges IV Login P Ranges Her Cancel Address IV Login P Ranges IV Login P Ranges Her Cancel Address IV Login P Ranges IV Login P Ranges Her Cancel Address IV Login P Ranges IV Login P Ranges Her Cancel Address IV Login P Ranges IV Login P Ranges Her Cancel Address IV Login P Ranges IV Login P Ranges Her Cancel Address IV De 122.164.224.40 122.164.224.40	tep 2 :				
Inde :- or Single IP Address : you want to set single IP address, give this type. Start IP Address 122.164.224.48 End IP Address 122.164.224.48 or One to More Range IP Address : you want to Set One or More Range IP address, specify like this Start IP Address 122.164.224.48 End IP Address 122.164.224.59 .ogin IP Ranges	here is you can see two ddress, which IP address	fields, Start IP Addr allow to user fo <mark>r I</mark>	ess and End IP Addre ogin.	ess, You can give IP	
Start IP Address 122.164.224.48 End IP Address 122.164.224.48 or One to More Range IP Address : you want to Set One or More Range IP address, specify like this Start IP Address 122.164.224.48 End IP Address 122.164.224.59 .ogin IP Ranges Nep torbs Pe Iter the range of vaid P addresses from which users with this profile can log in. Image: Cancel Please specify IP range I = Required Internet Iter click save button then you can see your IP address on profile setting page, see elow. Image: Cancel orgin IP Ranges Image: Cancel Action IP Start Address IP End Address Edit Del 122.164.224.40 122.164.224.40	or Single IP Address : you want to set single II	P address, give this	type.		
or One to More Range IP Address : You want to Set One or More Range IP address, specify like this Start IP Address 122.164.224.48 End IP Address 122.164.224.59 togin IP Ranges reter the range of valid IP addresses from which users with this profile can log in. Please specify IP range I - Required Informa Sur IP Address 122.164.224.48 Ind IP Address 122.164.224.48 fter click save button then you can see your IP address on profile setting page, see elow. cogin IP Ranges INFORMATION IP Start Address IP End Address Edit [Del 122.164.224.40 122.164.224.40	Start IP Address 122.	164.224.48	End IP Address 122	2.164.224.48	
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Save Cancel Please specify IP range I = Required Informs Start IP Address 122.164.224.48 fter click save button then you can see your IP address on profile setting page, see elow. ogin IP Ranges New Login IP Ranges IP End Address Action IP Start Address Edit Del 122.164.224.40	nter the range of valid IP addresses from which use	rs with this profile can log in.			
Please specify IP range I = Required Information Start IP Address 122.164.224.48 Save Cancel fter click save button then you can see your IP address on profile setting page, see elow. cogin IP Ranges New Login IP Ranges Login IP Ranges Action IP Start Address Edit Del 122.164.224.40		Save Cancel			
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Save Cancel fter click save button then you can see your IP address on profile setting page, see elow. ogin IP Ranges New Login IP Ranges Hell Action IP Start Address Edit Del 122.164.224.40	Start IP Address 122.164.224.48		End IP Address 122.16	64.224.48	
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Edit Del 122.164.224.40 122.164.224.40	Action IP Start Address		IP End /	Address	
	Edit Del 122.164.224.40		122.16	4.224.40	

Determine Object Access Security

Viewing the Object Access and Field-Level Security Report :

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

Object permissions specify the access that users have to standard and custom objects.

- > Create Users can read and create records.
- > Edit Users can read and update records.
- > Read Users can only view records of this type.
- > Delete Users can read, edit, and delete records.

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.

Tield-Level Security			
Standard Field-Level Security			
Account	[<u>View</u>]	Lead	[<u>View</u>]
Asset	[<u>View</u>]	Opportunity	[<u>View</u>]
Campaign	[<u>View</u>]	Opportunity Product	[<u>View</u>]
Campaign Member	[View]	Price Book	[<u>View</u>]
Case	[<u>View</u>]	Product	[<u>View</u>]
Contact	[<u>View</u>]	Social Persona	[<u>View</u>]
Contract	[<u>View</u>]	Solution	[<u>View</u>]
Event	[View]	Task	[View]
Idea Custom Field-Level Security	[<u>View</u>]	User	[<u>View</u>]
Back Office	[<u>View</u>]	ForTesting	[<u>View</u>]
Book	[<u>View</u>]	Job Application	[<u>View</u>]
Candidate	[<u>View</u>]	Job Posting	[<u>View</u>]
Department	[<u>View</u>]	Postion	[<u>View</u>]
Employee	[<u>View</u>]	Review	[<u>View</u>]
Employment website	[<u>View</u>]		

Step 1 : Click on Edit button.

Candidate Field-Level Security for profile Recruiter

	Edit Back to Profile		
	Lair Back to Home		
Field Name	Field Type	Visible	Read-Only
Candidate Number	Auto Number	\checkmark	\checkmark
Created By	Lookup	\checkmark	\checkmark
Email Id	Email	\checkmark	
First Name	Text	\checkmark	
Last Modified By	Lookup	\checkmark	\checkmark
Mobile Number	Phone	\checkmark	
Owner	Lookup	\checkmark	
	Edit Back to Profile		

Step 2 :

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There is some check box is not enable, 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.

Save			
Field Type	v	isible	Read-Only
Auto Number		✓	×
Lookup		✓	
Email	Mandatory Fields	✓	
Text		✓	
Lookup		✓	
Phone	N N	Fiel	n Mandatory
Lookup	7	✓	
Save			
	Save Cancel Field Type Auto Number Lookup Email Text Lookup Phone Lookup Save Cancel	Save Cancel Field Type V Auto Number Lookup Email Text Lookup Phone Lookup Save Cancel	Save Cancel Field Type Visible Auto Number Lookup Email Mandatory Fields Text Lookup Phone Lookup Save Cancel

Custom Object Security :

In SalesForce many security settings work together so you can control access to your custom objects with flexibility.

Set custom object security following levels :

Tab, Object, Records, Relationship, Fields

Tab - Display the custom tab for suitable users based on their user profiles.

Object - Set the access users have to create, read, edit, and delete records for each object.

Records - Set the default sharing model for all your users.

Relationship - For objects on the detail side of a master-detail relationship, specify the sharing access that users must have to the master record in order to create, edit, or delete records.

Fields - Set the level of access users have to fields on your custom object page layout.

Custom objects with no master-detail relationship :

Action	Required Privileges
Create a record	"Create" permission. The user must have the tab displayed to create a new record from the Create New drop-down list in the sidebar.
View a record	"Read" permission and Public Read Only or Public Read/Write sharing model if not the record owner.
Edit a record	"Edit" permission and Public Read/Write sharing model if not the record owner.
Delete a record	"Delete" permission and must be the record owner or above the record owner in the role hierarchy.

The following requirements apply to custom objects that have a master-detail relationship with a standard or custom object:

Action	Required Privileges
Create a record	"Create" permission and either read or read/write access to the related master record, depending on the value of the Sharing Setting attribute of the master-detail relationship field on the detail object.
View a record	"Read" permission and read access to the related master record. If the record has two master records in a many-to-many relationship, the user must have read access to both master records.
Edit a record	"Edit" permission and either read or read/write access to the related master record, depending on the value of the Sharing Setting attribute of the master-detail relationship field on the detail object.
Delete a record	"Delete" permission and either read or read/write access to the related master record, depending on the value of the Sharing Setting attribute of the master-detail relationship field on the detail object.
	When a user deletes a record that has related custom object records, all related custom object records are deleted regardless of whether the user has delete permission to the custom object.

Manage record access with the role hierarchy

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 Set Up Rules 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>.

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



Edit Role : Step 1 : Click on <u>Edit</u> link for Editing role.



Step 2 :

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	Help for this Page 🥝
Role Edit	
Label Role Name This role reports to Role Name as displayed on reports	CEO I CEO I CEO I CEO CEO CEO CEO CEO
	Save & New Cancel
Step 1 : Slick on <u>Add Role</u> link fo	Editing role.
ill all field's Label, Role ole Edit New Role	Name, Report to then Click on Save button.
Step 2 : Fill all field's Label, Role Role Edit New Role Role Edit	Name, Report to then click on Save button.
ill all field's Label, Role ole Edit New Role Role Edit Lai Role Name Scole Name as displayed repo	Add Role COO Edit Del Assign Add Role Name, Report to then Click on Save button. Help for this Page Namager Manager Manager Manager Manager
Step 2 : Fill all field's Label, Role tole Edit New Role Role Edit Lai Role Name as displayed repo	Image: Image: Image: Image: <td< td=""></td<>
Step 2 : Fill all field's Label, Role Role Edit Role Edit Lai Role Name Role Name as displayed repo	Add Role Manager be Manager to CEO on Manager ts Save Save & New Cancel Manager to CEO Name Report price Manager to CEO Name Save & New Cancel Manager ts Save Save & New Cancel Manager ts Def For this Page

Delete Role :

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



Assistent Manager1

The users shown in the Selected Users list are currently assigned to the role Assistent Manager1.

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.

			Cuncer	
Available Sear All Unassigned for:	e Users ch:	Add Remove	cp softtech CEO CFO Manage Assis SVP, Cu SVP, Hu SVP, Sa	r stent Manager1 stent Manager2 stomer Service & Support man Resources les & Marketing
	-	Save	Cancel	
ermission ow to Set Per etup > Manag	Sets : mission : e Users > Per Save	rmission Sets, C	lick on New bu	tton.
nter permission set informat	ion			Required Information
Label API Name	DataAccessbyuser DataAccessbyuser		i	
Description				
Description	will use this permission set			
Description elect the type of users who Who will use this permission set permission set, choose the sam	will use this permission set ? If you plan to assign this permi e license that's associated with t	ission set to multiple users with differer them.	at licenses, choose 'None'. If or	ly users with one type of license will use this
Description elect the type of users who Who will use this permission set permission set, choose the sam User License	will use this permission set ? If you plan to assign this permi e license that's associated with t Salesforce Platform	ission set to multiple users with differen them.	at licenses, choose 'None'. If or	ly users with one type of license will use this
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Description elect the type of users who Who will use this permission set permission set, choose the sam User License	will use this permission set ? If you plan to assign this permi e license that's associated with t Salesforce Platform	ission set to multiple users with different them. Cancel	nt licenses, choose 'None'. If or	ly users with one type of license will use this

Rind Settings	Clone Delete	Edit Properties		
ermission Set Overvie	w	Assigned Users		
Descriptio	'n		API Name	DataAccessbyuser
User Licens	e Salesforce Platform		Namespace Prefix	
Created B	³ y <u>voqesh sharma</u> , 12/17	/2013 12:24 PM	Last Modified By	<u>yoqesh sharma,</u> 12/17/2013 12:24 PM
pps				
Settings that apply to Salesfi and custom apps built on Fo	orce apps, such as Sales, orce.com	Assigned Apps Settings that specify which apps are	visible in the app menu	
<u>Learn More</u>		Assigned Connected Apps Settings that specify which connected	d apps are visible in the app menu	
	>	Object Settings Permissions to access objects and	fields, and settings such as tab avail	ability
Click here for addit App	5	App Permissions Permissions to perform app-specifi	c actions, such as "Manage Call Cent	ters"
Settings		Apex Class Access Permissions to execute Apex classe	S	
		Visualforce Page Access Permissions to execute Visualforce	pages	
System				
Settings that apply across al user management	l apps, such as record and	System Permissions Permissions to perform actions that	apply across apps, such as "Modify A	Ali Data"
Click here for System	n	Service Providers Permissions that let users switch to	other websites using single sign-on.	
fter that click etup > Mana rofile click on n Edit Assign	on Users. age Users > user profile nment butto	• User , click on N after that select on. you can see b	lew User or if wa Permission Se elow.	ant to update existing use t Assignments and click
Permission Se	t Assignment	ts	Edit Assignment	B Permission Set Assignments Help
No records to dis	splay			
n Edit Assign Permission Se No records to dis fter that selec	nment butto et Assignment splay ct user perm n see below	on. you can see b ts issions, then assi	elow. Edit Assignments	Permission Set Assignments H

Permission Set Assignments Vikram yadav

Available Dermission Sets		Enabled Permission S	ets
Spacial Permission	Add Remove	DataAccessbyuser	*
	+ Save	Cancel	

Exceptions

An exception is a problem that arises during the execution of a program. An exception can occur for many different reasons.

An exception denotes an error that disrupts the normal flow of code execution. You can use Apex built-in exceptions or create custom exceptions. All exceptions have common methods.

All exceptions support built-in methods for returning the error message and exception type. In addition to the standard exception class, there are several different types of exceptions.

Exception	Description	
AsyncException	Any problem with an asynchronous operation, such as	
	failing to enqueue an asynchronous call.	
CalloutException	Any problem with a Web service operation, such as	
	failing to make a callout to an external system.	
DmlException	Problem with a DML statement, such as an insert	
	statement missing a required field on a record.	
EmailException	Proble <mark>m wi</mark> th email, such as failure to deliver. For	
	more information, see Outbound Email.	
InvalidParameterValueExce	Problem with a URL. This is generally used with	
ption	VisualForce pages. For more information on	
	VisualForce.	
JSONException	Problem with JSON serialization and deserialization	
	operations. For more information, methods of	
	System.JSON, System.JSONParser, and	
	System.JSONGenerator.	
ListException	Problem with a list, such as attempting to access an	
	index that is out of bounds.	
MathException	Problem with a mathematical operation, such as	
	dividing by zero.	
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Page 14	www.nyperioliguru.com	

NoAccessException	Problem with unauthorized access, such as trying to
	access to This is generally used with VisualForce
	nades
NoDataFoundException	Problem with data that does not exist, such as trying
····	to access an sObject that has been deleted. This is
	generally used with VisualForce pages.
NoSuchElementException	Used specifically by the Iteratornext method. This
	exception is thrown if you try to access items beyond
	the end of the list. Ex:- if iterator.hasNext() == false
	and you call iterator.next(), this exception is thrown.
NullPointerException	Problem with dereferencing null, such as in the
	following code:
	String s; s.toLowerCase();
QueryException	Problem with SOQL queries, such as assigning a query
	that returns no records or more than one record to a
	singleton sObject variable.
RequiredFeatureMissing	A Chatter feature is required for code that has been
	deployed to an organization that does not have
	Chatter enabled.
SearchException	Any problem with SOSL queries executed with SOAP
	APIsearch() call, for example, when the searchString
Converting and	parameter contains less than two characters.
SecurityException	Any problem with static methods in the Crypto utility
SerializationException	Problem with the serialization of data. This is generally
Senanzacionexception	used with VisualForce pages
SObjectException	Problem with sObject records, such as attempting to
	change a field in an update statement that can only be
	changed during insert.
StringException	Problem with Strings, such as a String that is
	exceeding your heap size.
TypeException	Problem with type conversions, such as attempting to
	convert the String 'a' to an Integer using the valueOf
	method.
VisualforceException	Problem with a VisualForce page.
AMIEXCEPTION	Proplem with the XmiStream classes, such as failing to
	read or write XML.

Common Exception Methods :

Name	Return Type	Description
getCause	Exception	Returns the cause of the
		exception as an exception
		object.
getLineNumber	Integer	Returns the line number
		from where the exception
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		was thrown.
getMessage	String	Returns the error message
		that displays for the user.
getStackTraceString	String	Returns the stack trace as a
		string.
getTypeName	String	Returns the type of
		exception, such as
		DmlException,
		ListException,
		MathException, and so on.
initCause	void	Sets the cause for this
		exception, if one has not
		already been set.
setMessage	void	Sets the error message that
		dis <mark>play</mark> s for the user.

EmailException and DMLException Methods :

Name	Return Type	Description
getDmlFieldName s	String []	Returns the names of the field or fields that caused the error described by the ith failed row.
getDmlFields	Schema.sObjectField []	Returns the field token or tokens for the field or fields that caused the error described by the ith failed row. For more information on field tokens, see Dynamic Apex.
getDmlld	String	Returns the ID of the failed record that caused the error described by the ith failed row.
getDmlIndex	Integer	Returns the original row position of the ith failed row.
getDmlMessage	String	Returns the user message for the ith failed row.
getDmlStatusCod e	String	Deprecated. Use getDmlType instead. Returns the Apex failure code for the ith failed row.
getDmlType	System.StatusCode	Returns the value of the System.StatusCode enum.
getNumDml	Integer	Returns the number of failed rows for DML exceptions.

Manage field-level security

SalesForce.com provide many sections, following sections describe the characteristics and behaviors of page layouts, mini page layouts, and field-level security.

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Pa	ige 16	

Administrators restrict users' access to view and edit specific following fields

- 2
- > Detail and edit pages.
- ➢ Related lists.
- List views.
- > Reports.
- > Connect Offline.
- > Email and mail merge templates.
- > Custom links.
- > The partner portal.
- > The SalesForce Customer Portal.
- > Synchronized data.
- Imported data.

For View Field level Security :

Setup > **Customize** > **user Page Layout**, after that choose any object to apply Field Security.



action.

Select any link and see Filed level security.

Manage Field Level Security :

Setup > Manage user > Profile, Select any profile then go to down and you can see Field level security , click on any filed . you can see below.

Field-Level Security					
Standard Field-Level Security					
Account	[<u>View</u>]	7		Lead	[View]
Asset	[<u>View</u>]			Opportunity	[View]
Campaign	[<u>View</u>]			Opportunity Product	[<u>View</u>]
Campaign Member	[<u>View</u>]			Price Book	[View]
Case	[<u>View</u>]			Product	[View]
Contact	[<u>View</u>]			Social Persona	[View]
Contract	[<u>View</u>]			Solution	[View]
Event	[<u>View</u>]		Select any standard or	Task	[View]
Idea	[<u>View</u>]		custom object.	User	[<u>View</u>]
Custom Field-Level Security					
All Detail	[<u>View</u>]			Job Application	[View]
Candidate	[<u>View</u>]			Job Posting	[<u>View</u>]
coloege	[<u>View</u>]			Postion	[View]
Department	[<u>View</u>]			postionN	[<u>View</u>]
Employee	[<u>View</u>]			Review	[<u>View</u>]
Employment website	[<u>View</u>]	J		ZIP Code	[<u>View</u>]

Step 1 : click on Edit button.

Step 2 : check or uncheck check box for Field level security after that click on **Save** button.

	Save			
Field Name	Field Type		Visible	Read-Only
All Detail Name	Text		✓	
Branch Name	Text			
City	Picklist (Multi-Select)			
close Date	Date			
Created By	Lookup	checked or unchecked	✓	✓
Form no	Auto Number	for chenge on filed	V	✓
Image	Rich Text Area	,,	V	
Last Modified By	Lookup		<	✓
Open Date	Date			
Owner	Lookup		<	
Та	Checkbox			
	Save Cancel			

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