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# **Salesforce FAQs Collection part III**

## Security 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 common questions being asked in interview related to security in Salesforce. Join our professional training program and learn from experts.

History: Version Description Change 0.1 Initial Draft 0.1 Review#1

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#### **Question 1 : A custom profile does not appear for Custom object.**

#### Problem :

We have created a custom object "**SAP Accounts**" on Custom Object. We have already created a custom user profile "**USER1**" which we want to use to access this custom object "**SAP Accounts** ". We have set the object access to "**USER1**". But it is showing the message that we need to give "**USER1**" Read permission on Custom Object.

Step1 : Here you can see in user1 " SAP Account " custom object data is read only.



#### Solution : Step 1.

Login Admin account, Then go to **Setup** > **Manage Users** > **Profiles**, select profile name(Which given user), Click on **Edit** Profile. see below.

Quick Find Q Expand All   Collapse All	Profiles	Business Intelligence Solution Providers Inc.	
Force.com Home	All Profiles  Edit   Delete   Create New View		
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Administer	Action Profile Name +	User License	Custom
Manage Users	Edit   Clo Authenticated Website	Authenticated Website	
Mass Email Users	Edit   Clo Chatter External User	Chatter External	
Roles	Edit   Clo Chatter Free User	Chatter Free	
Permission Sets	Edit   Clo Chatter Moderator User	Chatter Free	
Profiles	Edit   Clo Contract Manager	Salesforce	
Public Groups	🔲 👩   Del <u>cp</u>	Salesforce	×
Queues	Edit   Del Custom: Marketing Profile	Salesforce	✓
Login History	Edit   Del Custom: Sales Profile	Salesforce	$\checkmark$
Identity Provider Event Log	Edit   Del Custom: Support Profile	Salesforce	$\checkmark$

## Step 2 :

After that go to down and check " **Custom Object Permissions** " in " **Custom Object Permission** " check all check box and save for Custom object " **SAP Accounts** ". see below.

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### Question 2 : limiting managers in the same role access to certain data.

**Problem :** What is the best way to limit managers in the same role to being able to only see the records they own and those of their subordinates.

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#### Solution :

Suppose you are setting this requirement for Student(This is a custom object) then follow following steps :

#### Step 1:

Set organization wide access of the Student to Private.

Go to Setup > Administration setup > Security controls > Sharing settings > Organization-

wide-defaults > Edit > Corresponding to that object set it to Private.

## Organization-Wide Sharing Defaults Edit



Edit your organization-wide sharing defaults below. Changing these defaults will cause all sharing rules to be recalculated. This could require sigr time depending on the amount of data in your organization. Setting an object to Private makes records visible to record owners and those above t access can be extended using sharing rules.

Save							
Object	Default Access	Grant Access Using Hierarchies					
Shape	Private 👻						
Student	PrivateSet as a private						
Contact	Controlled by Parent 👻	$\checkmark$					
Opportunity	Public Read/Write 👻	$\checkmark$					

**Step 2 :** Create role hierarchy and assign respective roles to managers and subordinates. Go to **Setup > administer > Manage User > Role**, Then create role.



Go to Setup > Administration setup > Security controls > Sharing settings > Organizationwide-defaults > Edit > checked the check box " Grant access using hierarchy". Organization-Wide Sharing Defaults Edit

Edit your organization-wide sharing defaults below. Changing these defaults will cause all sharing rules to be recalculated. This could require sigr time depending on the amount of data in your organization. Setting an object to Private makes records visible to record owners and those above t access can be extended using sharing rules.

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uild Customize Create	App Quick Start Schema Builder New custom object	New user Add multiple users Reset users' passwords	Manage apps Manage profiles Enable Chatter feeds	Sep 05 Vebinar: Intro to the Salesforce Mobile SDK: Building iOS Apps
Develop				

Note : After Logout you have to way of login

- 1.) http://salesforce.com click to login button.
- 2.) http://developer.force.com click to DE Login Button

#### Question 4: How to Open Security Token In SalesForce.com.

#### What is Security Token:

A security token is an automatically generated key by SalesForce that you must add to the end of your password in order to log into SalesForce from an untreated network. Step 1:

Click to you profile name open dropdown menu then select My Setting

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Go to My Setting > personal > Reset My Security Token



#### Reset My Security Token Reset Security Token



A new security token has been sent to yogesh\_cp8888@rediff.com, which is the email address associated to your user.

How to enter your security token:

When accessing salesforce.com either via a desktop client or the API from outside of your company's trusted networks:

If your password = "mypassword" And your security token = "XXXXXXXXXXXX You must enter "mypasswordXXXXXXXXXXXX in place of your password

Note that you do not enter a security token in place of your password when logging into salesforce.com via a browser.

#### Question 5 : How to permit VisualForce Page Access in User Account.

**Problem:** when I login my user account VisualForce page (NewExample9) not view give me error . see below.

Insufficient	t Privileges

Business Intelligence Solution Providers Inc.

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.

#### Solution :

Step 1:

#### Login your admin account then go to

Setup > Manage Users > User. Select user Profile which want to show VisualForce page. See below.

## All Users

View: All Users - Edit | Create New View

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#### A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other All

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#### Step 2 :

Then Go to down find " Enable VisualForce Page Access " then Click on Edit button.



**Step 3 :** Then select Available VisualForce page and add. You can see below.

	Save Cancel
Available Visualforce Pages	Enabled Visualforce Pages
Inputcompnt_page MyProfilePage My_New NewExample NewExample1 NewExample2 NewExample3 NewExample4 NewExample5 NewExample6 NewExample7 NewExample8 NewTest Overrding	SOSI Query Tool Query Tool NewExample9
<b>ep 4</b> : After that go to user page and you can	view VisualForce page. see below.
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## Question 6 : How to set login hours for user.

**Problem :** We have one user I want to set user login hours. user login time only 10am IST to 6 pm IST.

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Solution : Step 1 : Go to your Admin a to set login hours) so All Users	ccount Then go ee below.	to <b>Setup &gt; Manage</b>	User > Us	er, Select us	er (which	USER WANT Help for this Page 🕜
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Step 2 : Go to down	and see Login	Hours, click on Edit	Button. see	e below		
Login Hours		Edit	D, dhee	BIS	P. Log	in Hours Help <i>?</i>
No login hours specifi	ed					

Step 3 : Here you can set login hours day wise.

## 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.

)ay	Start Time		End Time				H	lere you can set ogin Hourse day
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uesday	10:00 AM	-	6:00 PM	-	<u>Clear times</u>			
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riday	10:00 AM	-	6:00 PM	-	<u>Clear times</u>			
aturday	10:00 AM	-	6:00 PM	•	<u>Clear times</u>			
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set login - 6 P BISP Sal	hours then MIST. estol	you	can try to l	ogin.	it show you Er With Sales	Cancel ror messa	lge. you	can only login 10
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Your login atter password me login time ma administr	hours then MIST. estop	you	can try to l	ogin.	it show you Er With Sales our salesp have mot to everyth -Heather Talerico, Director, Sales Solution Explore the Sales	Cancel ror messa sforcel, beople bile acc ing. %	ile App>	can only login 10
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## **Question 7: How to set Login IP Ranges for user.**

Problem: We have some user I want set Login IP Ranges.

Ex: I am set this IP 192.168.1.2 for user, user can login on this IP only other IP is not allow to login. You can see that time user login any IP address. see below.







Help for this Page 🕜

Enter the range of valid IP addresses from which users with this profile can log in.

Sav	eCancel		
Please specify IP range			= Required Information
Start IP Address 192.168.1.10	End IP Addres	192.168.1.30	
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fter set IP Ranges then you can try to log ou can only login 192.168.1.10	gin. it show you Erro	message.	
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## **Question 8: How to Enabled Apex Class Access in User Account.**

Problem : when I login my user account Apex Class not is there view. See below. For see Apex Class in User Account Setup > Develop > Apex Class. Help for this Page 🕜 Apex Classes Force.com Apex Code is an object oriented programming language that allows developers to develop on-demand business applications on the Force.com platform. Percent of Apex Used: 0.83% You are currently using 25,025 characters of Apex Code (excluding comments and @isTest annotated classes) in your organization, out of an allowed limit of 3,000,000 characters. Note that the amount in use includes both Apex Classes and Triggers defined in your organization. Estimate your organization's code coverage i Compile all classes i View: All 
Create New View <Previous Page | Next Page> A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All There is Apex class Name Generate from WSDL Schedule Apex Name 1 Namespace Prefix Size Without Comments Last Modified By **Override Log Filters** Api Version Status Account 29.0 Active 38 vogesh sharma, 2/25/2014 2:55 PM AccountUpdate Test FieldStorm 912 vogesh sharma, 1/23/2014 3:26 PM 23.0 Active 29.0 441 vogesh sharma, 2/12/2014 12:44 PM accsearchvalue Active ActionHandler geopointe 28.0 Active 79 vogesh sharma, 2/28/2014 9:59 AM Solution : Step 1: Go to your Admin account Then go to Setup > Manage User > User, Select user (which Profile want to set enable Apex Classes) see below. Help for this Page 😢 All Users ness Intelligence Solution Providers Edit I Create New View View: All Users A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All New User Reset Password(s) Add Multiple Users Export to Google Apps Active Profile Manager Action Full Name ↑ Alias Username Last Login Role 3/13/2014 4:02 Assistent Edit bisp, bisp bisp@bisp.com Standard Platform User bbisp PM Manager1 Chatter chatty.00d900000000x9eam.ih6mvzuphlxt@chatter.salesforce.com Chatter Expert 1 Chatter Free User Step 2 : Go to down and see " Enable Apex Classes ", click on Edit button. Enabled Apex Class Access Edit Enabled Apex Class Access Help (?) No Apex Classes enabled Step 3 : Select Available Apex Class and click on Add button, save it. See below.

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#### Question 9 : How to set Field level Security .

Problem : User1 (Asst. Manager1 )login see all account Fields. User 2 (Asst. Manager2) login see not see account All fields.

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Step 8 : Unchecked visible field's (which want to you). then click on Save button.

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**Step 9 :** After that login User2(Asst. Manager2) account, here you can see some Field's messing. you can see below.

salesforce	Search	This user2 (Asst. Manager2) Account joy sharma 👻 Setup	Help Platform <b>v</b>
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**Step 2 :** After Edit Go to down and find Tab setting, here find Account Tab and set " **Tab Hidden**". and save it.

