

FOCUS FORWARD >>

THE CHANGING WORLD OF PROFILES AND PERMISSIONS:
**How to Structure Your Security
Differently**



AUGUST 2023

INTRODUCTION



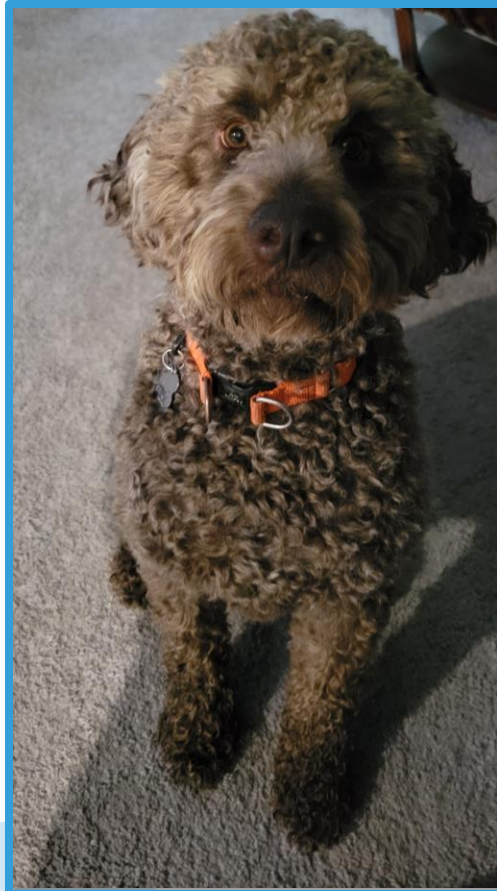
KENDRA VON ACHEN

Kendra Von Achen is a Functional Architect and Consulting Director at Turnberry Solutions. She has over **20 years** of CRM experience and over **11 years** of Salesforce experience. Kendra is 10x Salesforce certified (and has a new Accredited Professional certification) and not stopping there!

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| A LITTLE MORE ABOUT ME



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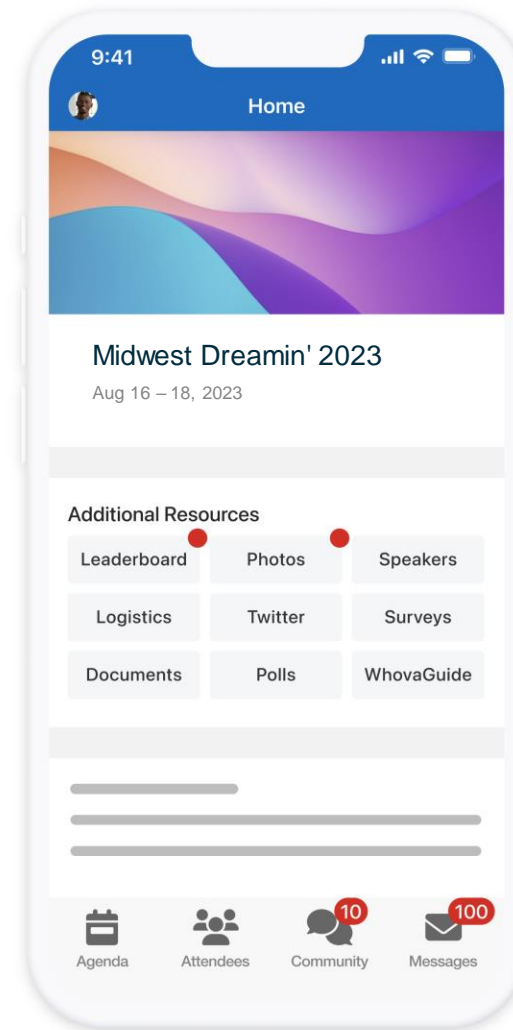
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| TOPICS COVERED

1. WHAT'S HAPPENING AND WHEN?

2. WHAT CAN I DO ABOUT IT?

3. USE CASES/EXAMPLES

4. DOCUMENT, DOCUMENT, DOCUMENT

5. NOTABLES

6. Q&A

| WHAT'S HAPPENING AND WHEN?

Timeline for Profile changes

Beginning **Spring '26 release of Salesforce**, the following Profile components will only be available in Permission Sets:



- User permissions
- Object permissions
- Field permissions
- Tabs
- Record Types (except Defaults)
- Apps (except Defaults)
- Connected app access
- Apex classes
- Visualforce pages
- Custom permissions

PLAN AHEAD



Chart out your current profiles



Build Permission Sets based on minimum permissions for each user group



Map out necessary Permission Set Groups you need



Identify which Permission Sets go into each Permission Set Group

USE CASE

Practical example of how to set up Permissions outside of Profiles



SITUATION:

- Company has Sales, Marketing, Executive Teams
- All use Salesforce
- All permissions currently under three separate Profiles

OBJECTS

1. Lead
2. Account
3. Contact
4. Opportunity
5. Opportunity Products
6. Products
7. PriceBooks
8. Campaigns
9. Campaign Members

USER GROUPS



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SITUATION:

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OBJECTS

1. Outside Sales
2. Inside Sales
3. Marketing
4. Executive
5. System Administrator

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USER GROUPS

1. Outside Sales
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USE CASE



Practical example of how to set up Permissions outside of Profiles

DESIGN AND CREATE YOUR OBJECT PERMISSIONS:

| Object | OWD (Sharing Settings) | System Administrator | Outside Sales | Inside Sales | Executive | Marketing |
|-----------------------------|------------------------|----------------------|---------------|--------------|-----------|-----------|
| Lead | Private | CRUD | R | CRU | R | NONE |
| Account, Contract and Asset | Public Read Only | CRUD | CRU | CRU | CRU | R |
| Contact | Controlled by Parent | CRUD | R | CRU | CRU | R |
| Opportunity | Private | CRUD | RU | CRU | R | NONE |
| Opportunity Product | | CRUD | RU | CRU | R | NONE |
| Product | Public Read Only | CRUD | CRUD | R | R | R |
| Price Book | Use | CRUD | CRUD | R | R | R |
| Campaign | Public Read Only | CRUD | NONE | R | R | CRUD |
| Campaign Member | Controlled by Campaign | CRUD | NONE | CRU | R | CRUD |

USE CASE



Practical example of how to set up Permissions outside of Profiles

DESIGN AND CREATE YOUR PERMISSION SETS:

| Permission Set Name | Object | Read | Create | Edit | Delete | ViewAllRecords | ModifyAllRecords |
|----------------------|-----------------------|------|--------|------|--------|----------------|------------------|
| Account - Read Only | Account | x | | | | | |
| Account - Read Only | Contract | x | | | | | |
| Account - Edit | Account | x | x | x | | | |
| Account - Edit | Contract | x | x | x | | | |
| Contact - Read Only | Contact | x | | | | | |
| Contact - Edit | Contact | x | x | x | | | |
| Oppty - Read Only | Opportunity | x | | | | | |
| Oppty - Read Only | Opportunity Line Item | x | | | | | |
| Oppty - Edit | Opportunity | x | x | x | | | |
| Oppty - Edit | Opportunity Line Item | x | x | x | | | |
| Lead - Read Only | Lead | x | | | | | |
| Lead - Edit | Lead | x | x | x | | | |
| Campaign - Read Only | Campaign | x | | | | | |
| Campaign - Edit | Campaign | x | x | x | | | |
| Products - Read Only | Product2 | x | | | | | |
| Products - Read Only | Pricebook2 | x | | | | | |
| Products - Read Only | PricebookEntry | x | | | | | |
| Products - Edit | Product2 | x | x | x | | | |
| Products - Edit | Pricebook2 | x | x | x | | | |
| Products - Edit | PricebookEntry | x | x | x | | | |

USE CASE

Practical example of how to set up Permissions outside of Profiles



DESIGN YOUR FIELD LEVEL SECURITY (FLS):

| Permission Set Name | Object | Field | Read | Edit |
|---------------------|---------|------------------|------|-------|
| Account - Read Only | Account | Account Name | TRUE | FALSE |
| Account - Read Only | Account | Billing Address | TRUE | FALSE |
| Account - Read Only | Account | Shipping Address | TRUE | FALSE |
| Account - Read Only | Account | Active | TRUE | FALSE |
| Account - Read Only | Account | Region | TRUE | FALSE |
| Account - Read Only | Account | Type | TRUE | FALSE |
| Account - Read Only | Account | Website | TRUE | FALSE |
| Account - Read Only | Contact | Name | TRUE | FALSE |
| Account - Read Only | Contact | Email | TRUE | FALSE |
| Account - Read Only | Contact | Mobile Phone | TRUE | FALSE |
| Account - Read Only | Contact | Email Opt Out | TRUE | FALSE |
| Account - Read Only | Contact | Title | TRUE | FALSE |
| Account - Edit | Account | Account Name | TRUE | TRUE |
| Account - Edit | Account | Billing Address | TRUE | TRUE |
| Account - Edit | Account | Shipping Address | TRUE | TRUE |
| Account - Edit | Account | Active | TRUE | TRUE |
| Account - Edit | Account | Region | TRUE | TRUE |
| Account - Edit | Account | Type | TRUE | TRUE |
| Account - Edit | Account | Website | TRUE | TRUE |
| Account - Edit | Contact | Name | TRUE | TRUE |
| Account - Edit | Contact | Email | TRUE | TRUE |
| Account - Edit | Contact | Mobile Phone | TRUE | TRUE |
| Account - Edit | Contact | Email Opt Out | TRUE | TRUE |
| Account - Edit | Contact | Title | TRUE | TRUE |

- Only include the fields you need for each Permission Set
- Maintain this list as you continue to build out or enhance your Salesforce org

USE CASE



Practical example of how to set up Permissions outside of Profiles

DESIGN AND CREATE PERMISSION SET GROUPS (PSGs):

| PermissionSetGroup | PermissionSet | Notes |
|--------------------|---------------------------|-------|
| Executive | Account - Read Only | |
| Executive | Campaign - Read Only | |
| Executive | Cases - Read Only | |
| Executive | Contact - Read Only | |
| Executive | Lead - Read Only | |
| Executive | Oppty - Read Only | |
| Executive | Products - Read Only | |
| Executive | Sold Products - Read Only | |
| Inside Sales | Account - Read Only | |
| Inside Sales | Campaign - Read Only | |
| Inside Sales | Contact - Edit | |
| Inside Sales | Lead - Edit | |
| Inside Sales | Oppty - Edit | |
| Inside Sales | Products - Read Only | |
| Marketing | Account - Read Only | |
| Marketing | Campaign - Edit | |
| Marketing | Contact - Edit | |
| Marketing | Lead - Edit | |
| Marketing | Oppty - Read Only | |
| Outside Sales | Account - Edit | |
| Outside Sales | Activity Tracking | |
| Outside Sales | Campaign - Read Only | |
| Outside Sales | Contact - Read Only | |
| Outside Sales | Lead - Read Only | |
| Outside Sales | Oppty - Read Only | |
| Outside Sales | Products - Read Only | |
| System Admin | Account - Edit | |
| System Admin | Campaign - Read Only | |
| System Admin | Contact - Edit | |
| System Admin | Lead - Edit | |
| System Admin | Oppty - Edit | |

| PermissionSet - Unique | PermissingSetGroup - Unique |
|------------------------|-----------------------------|
| Account - Read Only | Executive |
| Account - Edit | Inside Sales |
| Contact - Read Only | Marketing |
| Contact - Edit | Outside Sales |
| Oppty - Read Only | System Admin |
| Oppty - Edit | |
| Lead - Read Only | |
| Lead - Edit | |
| Products - Read Only | |

|SUMMARY

Designing Permission Sets and Permission Set Groups

1. Outline Object-level Sharing Settings and CRUD by User Group
2. Outline System permissions by User Group
3. Build a matrix of Field-level security by User Group
4. Cross-reference 1 – 3 above to define the needed Permission Sets
5. Create matrix of Permission Sets to be a part of each Permission Set Group
6. Identify which Users will be assigned each Permission Set Group
7. Design new Profiles (or modify existing ones) to meet the needs of all your Users
8. Identify what Profile to update each User to

| MAINTAINING PERMISSIONS



Adjust User Management settings:

Enhanced Permission Set Component Views

Use an updated user experience for portions of the permission set user interface.

Permission Set & Permission Set Group Assignments with Expiration Dates

Create permission set and permission set group assignments that expire on a date that you specify using an enhanced user interface. If this setting is disabled, you can't set an expiration date for permission set and permission set group assignments.

Field-Level Security for Permission Sets during Field Creation (Beta)

Set field-level security for permission sets when creating or editing custom fields. When this option is enabled, you configure access to the new field for permission sets instead of profiles.



Use tools to change multiple settings at a time:

- Mass Assign Permissions
- User Access and Permissions Assistant
- Salesforce Inspector – to query Permission Sets and fields
 - Also use to Import Field Permissions for new fields

| NOTABLES

Things to be mindful of



LICENSE TYPES

When to use the License Type associated with a Permission Set and when not to



OVERLAPPING PERMISSIONS

Overlapping permissions across permission sets assigned to the same PSG or user



MANAGED PACKAGES

Some Managed Packages' permission sets don't work inside a Permission Set Group – test thoroughly before deploying

Q&A

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