Salesforce - Custom Objects

The organization's data will always not fit into the existing standard objects.so we can extend and customize many salesforce objects to meet the need.
Custom Object features:
Build page layout to control which fields users can view and edit when entering data for the custom object record.

continue...

import custom object records
create reports and dashboards to analyze custom object data
create a custom tab for the custom object, to display the object's data
track tasks and events for custom object records

Salesforce Object relationship

Master Detail Relationship
Lookup Relationship
Schema Builder: The Various objects and their relationships of a salesforce application can be easily viewed using the Schema builder. And just not viewing bur we can also design, modify and implement new data models using the schema builder.

Salesforce Objects

The Salesforce plarform stores data in relational tables. The records in these tables contain data for the structure of the platform itself as well as user created data. These relational tables are refeffered as objects in Salesforce.
Stadard Objects - The obj created by the Salesforce platform.
Custom Objects - The obj created by you based on your business processes.
External Objects - The objs which you create map to the data stored outside your organization.

Just Exapmle

When a new custom object is created, we create a permission set for those objects and attach those permission sets to the users who will access to those objects.The same logic applies when we want to grant temporary access to specific objects for a user.

Permission sets

Permission sets are addtional access given to a user on some objects which are not covered through their profiles.so it just extends users access to some objects based on their profiles.

Creating a Permission Set
Setup - users- Permission sets

User Profiles

Profiles are created to address the requirement of a particular business function.
HR Profile, work history, Medical History and attendance of Employee.
Finance department, access the attendance and renumeration details of the employee.
Creating Profile:
Setup - Users - Profiles.

Salesforce- Control Access Objects

The access restriction for different objects is managed by using profiles and permissions. the type of access(View, edit, create, etc) can also be customized through this mechanism. A user can have only one profile but can have multiple permission sets so through profiles the minimum basic permission for the selected objects is granted while, through permission sets additional permissions beyond the profile can be granted.

Continue...

Fileds Level
it is used to restrict access of users to certain fields even when the user has access to the object containing the field.

Reocrds Level
This access level permits the user to access only certain records of an object.

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Data Security

Salesforce - Control Access Org
Levels of Data Access
Organization Level
it is created by Maintaining a list of authorized users, setting passwords policies and limiting login access to certain hours and certain locations.
Crate and mange users
Set Password Policies
Restricting Access from IP Address

Objects Level
it is done by setting permission on a particular object by allowing selective viewing, editing or deleting of any object in that record.

Salesforce - Control Access Fields

There are scenarios in which we grant access to an object to a user but we also want to restrict the access to certain fields of that object. So using field-level security, we can control the user's access to see an edit or delete certain fields of an object.

Field-level access settings are achieved in two ways -
Edit a single permission set or profile containing all the fields which require access restriction.
Edit permission on a single field to be applied in multiple profiles.

Salesforce - Control Access Records

Record Ownership
A unique feature of salesforce is the ownership of every stored record. Every record in every object has a field which marks the ownership of that record. A user who needs access to this record becomes part of the profile which is the same as the profile of the owner of that record.

Restriction Mechanism

Access is granted at multiple levels like Object, Field and Records. Conflicts might come up between the access levels. There may be a read access on a record but the object containing it might not have read access for a user. In such case, the access type which is more restrictive (gives less access) will be applied.

Continue...

So a record without access permission will remain inaccessible even when the object containing it is accessible and an Object without access permissions will remain inaccessible even when it has some records to which the user has read access.

Record Sharing Mechanism

The Saleforce platform provides four distinct mechanisms to share the records of an object with the users.

Organization-wide defaults
Pulblic read/write, Public Read only, Private and Conrolled by Parent
Manual sharing
Role hierarchies
Sharing rules

Manula Sharing

In this access model, the record owners give the read and edit permissions to specific users. So it is a manual process in which individual or group of records are handled by the record owners. This is to be done for each user profile that needs the access.

Salesforce - Create a Role Hierarchy

Role hierarchy is a mechanism to control the data access to the records on a salesforce object based on the job role of a user.
Defiing a Role Hierarchy
Step1
Set Home - Users - Roles - Setup Roles.

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Salesforce - Define Sharing Rules

In this chapter, we will discuss how to define sharing rules in Salesforce. Though we can manage the access to different objects and records through organization-wide settings and role hierarchies, we come across situations wherein, group.

Setps to create Sharing Rules
Setup home - Users - Public Groups - New Group SAVE

For Example

exceptions are required. We need to grant access to specific data to specific users who are not able to access the required data because of their roles. For example, to see the case history when a user has only access to the current case details. In such scenarios, we take help of sharing rules. Through this mechanism, we create a public group which will accommodate all the users who need such exception and then add sharing rules to such a

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