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 **360 Degree Cloud Technologies**
Everything You Need To Know

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About **the Author**



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Live, eat, and breathe Salesforce

- Salesforce **Certified Veteran**
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About Us



How to Control Authorization with Custom Profiles and Roles

Before you can plan on giving partners and customers access to Salesforce, you need to understand how you can control the authorization to access your resources. You can assign user-profiles and roles to manage authorization. These profiles would clarify how the respective users can use the data and what permission they have in your Salesforce. Specifying Roles would help you create a user hierarchy, which will help users to access data shared or owned by subordinates.

Salesforce helps you create standard profiles for users with pre-configured permissions to define authorization. For better control, you can always clone a standard profile and make necessary edits to permissions. Here are the steps that would help you modify a standard profile and assign it to a user.


- 1) From Setup, enter Profiles in the Quick Find box, then select it.
- 2) Click Clone, which is next to External Identity User.

- 3) Enter a desired name for the profile and save it.
- 4) Click Edit to customize the profile. You can modify the permissions of the profile with these steps.
 - a) Click Edit.
 - b) Search for API Enabled and select the checkbox next to it.
This permission will give users API access to your org's data through any back-end mechanism.
 - c) Click Save.
- 5) Create a role structure. These steps will help assign a role to the user who manages your site.
 - a) Enter Role in the Quick Find box and select Roles.
 - b) Select Product-based Sample from the dropdown list and select Set Up Roles.
 - c) Click Add Role under CEO.
 - d) For the role label, enter Customer Manager.
 - e) Click Save.
- 6) Add the Customer Manager role to the user site manager so the manager can modify the Customer profile as needed.
- 7) Enter Users in the Quick Find box and select Users.
- 8) Click Edit next to the username.
- 9) Select Customer Manager under Role.
- 10) Click Save.

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- ❖ CTI (Calls)
- ❖ Ringless Voicemail
- ❖ Facebook Messenger
- ❖ Automated Texting
- ❖ 1-on-1 Conversation
- ❖ Link Tracking
- ❖ Bulk Texting & Scheduling
- ❖ Intelligent Texting (itext)

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Thank You



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