



Helping You... Miss the Iceberg

Using Salesforce Permission Sets

Summary: Salesforce Enterprise and Performance Editions include a feature called Permission Sets which can be used to define a collection of application features, object access permissions, and administrative rights. All Users associated with a Permission Set are given the permissions from that Permission Set. And since each User can be associated with multiple Permission Sets, you no longer need to clone Profiles just to give 1 User one special permission.

For complete information about Salesforce Permission Sets, see

https://help.salesforce.com/HTViewHelpDoc?id=perm_sets_overview.htm&language=en_US

The Iceberg:

Since Permission Sets provide similar functionality as Profiles, it is easy to think about replacing your Profiles with Permission Sets. This seems like a good idea so you can simplify your Profiles and still provide Users the permissions they need. The result, though, is that you have a collection of Permission Sets that are hard to understand and maintain, and you end up cloning Permission Sets as special needs arise.

How you miss it:

Instead, think about a Permission Set as providing a single specific set of permissions. For example: "Manage Users" or "Access to Custom Object A" or "Access to AppExchange Package B". Once you configure the permissions, you can assign any User, from any Profile. And, if you need to see which Users are allowed to "Manage Users", you can review the Users associated with that Permission Set. To remove the permission for a User, just remove them from the Permission Set.

Until Salesforce Spring 14 is released, there is an excellent free AppExchange package called "The Permissioner" which makes adding/removing Users to Permission Sets a breeze. In Salesforce Spring '14, Permission Set User association will be available natively in the Salesforce UI.

Extra tip: To migrate from Profiles to Permission Sets, first define your Permission Sets and assign your Users. Then remove permissions from your custom Profiles and centralize your Users into just the Profiles you need. Your Users will never know the difference and your life as an Admin will be much easier.

For general Salesforce assistance and advice from the Salesforce User Community visit: <https://success.salesforce.com/>

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