



Security Roles & Field Security Profiles

Dynamics CRM allows you to customize access to entities, forms and even fields to different users based on two entities linked to the User record. Security Roles determine access to entities while Field Security Profiles allow you to specify the fields on those entities users have access to. If your organization requires data security controls, or you have a large staff and want to restrict certain actions to administrative users, understanding these entities can help you reach your goals.

COURSE OBJECTIVE: To understand and learn how to set up security roles and field security profiles.

Lesson 1: Finding and Defining Permissions Entities

Task 1: Define Security Roles and navigate to them from the settings and user records

Task 2: Understand default security roles in the system

Task 3: Define Field Security Profiles and know where to set and assign them

Lesson 2: Create a Custom Security Role

Task 1: Setting Access Levels to Default and Custom Entities

Task 2: Managing User Roles

Task 3: Reading a Permissions Error

Lesson 3: Create a Field Security Profile

Task 1: Enable Fields

Task 2: Create a Team and a Field Security Profile

Task 3: Manage Permissions

Task 4: Test Profile

Lesson 4: Form Permissions

Task 1: Navigate to Form Customization

Task 2: Manage User access to a custom form