

Salesforce Certified Sharing and Visibility Architect

Duration: 5 days

Prerequisites

- **Strong knowledge of Salesforce Administration**
- **Experience with Roles, Profiles, Permission Sets**
- **Understanding of Salesforce Data Model**
- **Knowledge of Apex and Platform Security**
- **Familiarity with Large Data Volume (LDV) environments**

Day 1 – Salesforce Security Architecture Foundations

Objectives

Understand Salesforce security architecture and the foundations of data access.

Topics

1. Salesforce Security Model Overview

- Layers of Salesforce Security
- Identity vs Data Security
- Security architecture principles

2. Object Level Security

- Profiles
- Permission Sets
- Field-level security
- Permission Set Groups

3. Record Level Access Overview

- Organization-Wide Defaults (OWD)
- Role hierarchy
- Sharing architecture basics

4. Authentication & Identity Basics

- Login IP restrictions
- Login hours
- Multi-factor authentication

Hands-On Labs

- Configure **Profiles and Permission Sets**
 - Configure **Field Level Security**
 - Implement **Permission Set Groups**
 - Validate user access scenarios
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Day 2 – Record Access Architecture

Objectives

Design scalable record access models.

Topics

1. Organization-Wide Defaults (OWD)

- Private vs Public models
- Controlled by parent
- Grant access using hierarchies

2. Role Hierarchy Architecture

- Role hierarchy design
- Impact on data access
- Role hierarchy limits and best practices

3. Sharing Rules

- Owner-based sharing rules
- Criteria-based sharing rules
- Guest user sharing

4. Team Based Access

- Account Teams
- Opportunity Teams
- Case Teams

Hands-On Labs

- Design **Role Hierarchy**
 - Implement **OWD Strategy**
 - Configure **Sharing Rules**
 - Configure **Account Teams**
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Day 3 – Advanced Sharing Mechanisms

Objectives

Implement advanced sharing techniques for complex architectures.

Topics

1. Manual Sharing

- Use cases
- Limitations

2. Apex Managed Sharing

- Custom sharing objects
- Apex sharing reasons
- Programmatic record sharing

3. Enterprise Territory Management

- Territory hierarchy
- Territory models
- Territory assignment rules

4. External Sharing Model

- Partner communities
- Customer communities
- External sharing rules

Hands-On Labs

- Implement **Apex Managed Sharing**
 - Configure **Territory Model**
 - Create **External Sharing Rules**
 - Test access for community users
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Day 4 – Large Data Volume (LDV) & Performance Optimization

Objectives

Design scalable sharing models for enterprise data volumes.

Topics

1. Large Data Volume Concepts

- Data skew

- Ownership skew
- Role hierarchy skew

2. Sharing Performance

- Sharing recalculation
- Deferred sharing maintenance

3. Data Partitioning Strategies

- Divisions
- Skinny tables
- Archiving strategies

4. Security in High Volume Environments

- High-volume portal users
- Platform license considerations

Hands-On Labs

- Analyze **Data Skew Scenario**
 - Optimize **Sharing Model**
 - Configure **High-Volume User Access**
 - Test **Sharing Recalculation**
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Day 5 – Architect Design Patterns & Exam Preparation

Objectives

Design enterprise-grade security architectures and prepare for certification.

Topics

1. Sharing & Visibility Design Patterns

- Centralized ownership model
- Distributed ownership model
- Segmented access model

2. Enterprise Architecture Scenarios

- Multi-region organization
- Multi-business unit architecture
- Partner data access models

3. Security Governance

- Data classification
- Compliance architecture
- Audit strategies

4. Certification Exam Preparation

- Architect exam blueprint
- Scenario-based questions
- Architecture case studies
- Mock exam discussion

Hands-On Labs

- Design **Sharing Architecture for Enterprise Org**
- Case Study: **Global Sales Organization**
- Mock **Architect Scenario Design**