



Who Sees What vs Setup Screens vs a Spreadsheet Audit

Three ways to answer an access question, honestly compared.

Short answer: native Setup screens are free and authoritative but organised around rules, not people, making any person-first question slow. A manual spreadsheet audit can answer person-first questions directly, at the cost of significant effort and a result that goes stale immediately. A purpose-built tool answers on demand, at the cost of being a separate thing to install, though in this case a free one.

What are native Setup screens good for?

Always available, no additional tool, and the authoritative source, since every other approach ultimately reads the same underlying configuration.

The weakness: organised around profiles, permission sets and sharing rules individually, rather than around a person. Answering "what can this user do" means manually checking every rule that could apply, across separate screens for object, field and record access, none of which reference each other.

What about a manual spreadsheet audit?

Can be structured around exactly the question the reviewer cares about, and produces a shareable, reviewable artefact a Setup screen does not.

The weakness: significant effort to build correctly, particularly capturing field-level security and record-level sharing. The result reflects a snapshot at export time and goes stale as soon as anything changes, often within days.

Who Sees What vs Setup Screens vs a Spreadsheet Audit
Three ways to answer a Salesforce access question. Here's how they compare.

Same question. Three different paths.

Useful, but hard to keep current.

Different effort. Different results. Same goal.

Know who can see what. Move forward with confidence.

Powerful, but not person-first.

Person-first answers. In seconds.

Better Access Decisions

Right tools. Less guesswork. A more secure Salesforce.

Setup Screens
Always available. Authoritative source.

- Free and built into Salesforce
- Shows the actual configuration
- Needed for making changes
- Organized by rules, not people
- Manual and time-consuming
- Object, field and sharing spread across multiple screens

Best for: making configuration changes or simple, specific checks.

Spreadsheet Audit
Flexible, but high effort.

- Can be structured around your exact needs
- Produces a shareable output
- Useful for one-time, larger reviews
- Significant effort to build and maintain
- Goes stale as soon as anything changes
- Hard to capture field & record-level access
- Higher risk of human error

Best for: one-time reviews or external submissions where a static document is required.

Who Sees What
Live answers. Clear explanation.

- Answers "what can this person do" directly
- Shows object, field and record access together
- Names the exact rule for each grant
- Always reflects current configuration
- Free and read-only (no risk of accidental changes)
- Doesn't generate scheduled reports
- Doesn't make the actual permission changes
- Not a replacement for formal GRC tools

Best for: troubleshooting, access reviews, onboarding/offboarding, and any person-first question.

Who Sees What
See Access. Build Trust.

People
Process
Clarity
Impact

Where does Who Sees What fit?

A native, read-only, purpose-built tool that queries the same underlying metadata as Setup, resolved from the person's perspective. Answers the person-first question in seconds, always reflecting current configuration, and names the specific rule responsible for each grant.

The honest limitation: it does one thing. It does not generate a scheduled report, does not integrate with an external GRC platform, and does not make the actual permission changes a finding might require.

Side by side

	Setup screens	Spreadsheet audit	Who Sees What
Cost	Free	Free, high effort to build	Free
Query direction	Rule first	Whatever is built	Person first
Time per user	30+ min	Hours to build	Seconds
Reflects current state	Yes	No, a snapshot	Yes
Shows granting rule	Manual cross-reference	If built to include it	Shown directly
Risk of modifying while checking	Present	None	None, read-only



How should you choose?

Use Setup screens directly when the question is simple or you are making the actual permission change.

Build a spreadsheet audit when you need a static, formally submittable document and have the time to build it carefully.

Use a tool like Who Sees What when the question is genuinely person-first, which covers most troubleshooting, reviews, and onboarding or offboarding checks.

[Get Who Sees What free on the AppExchange →](#)

Who Sees What is built and maintained by TwinStack Solutions, a Salesforce partner. Questions about setup: info@twinstack.net