



Security + Access Manager Suite

For Salesforce®

The modular solution to managing user access and security



Permissions Manager Pro



Ultimate User Manager



Instant Permissions Cloner



Permissions Audit Planner Pro



Field Trip Analysis



Report Manager Pro



Data Dictionary Builder



Data Dictionary User

Security + Access Manager Suite from Application Perfection streamlines the process of establishing, managing, and auditing security and access rights, permissions and reports, saving time, effort, and costs.

Recent Enhancements

- + New Org Health Charts on the Home tab. Informative and easy to understand
- + Audit Process on the home tab for easy reference
- + 150 new enhancements to the product
- + New back-end and UI optimization
- + Great new user features and capabilities to make your experience even better

Application *Perfection*



Here's why Admins choose Security + Access Manager

The Security & Access Manager Suite helps Admins clean up access models, eliminate outdated reports, and bring structure to their metadata documentation—all in one place.

Admins can easily identify unused permissions, archive clutter, and enforce governance standards across user access and data. This leads to a more efficient Salesforce org, improved stakeholder confidence, and a smoother experience for Admins, end users, and compliance teams alike.



Permissions Manager Pro

- Gain full control over permissions access
- Mass audit, update and maintain

Ultimate User Manager

- Optimal control over user management
- Identify critical user access risks, mitigate and revoke

Instant Permissions Cloner

- Migrate profiles to permission Sets in 3 clicks
- Clone users and their related permissions

Permissions Audit Planner Pro

- Streamline your audit process from start to finish
- Plan, track, document and maintain compliance

Report Manager Pro

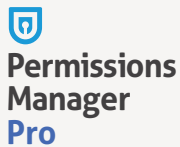
- Effortless cleanup and optimization of reports
- Mass organize, archive, move or delete

Field Trip Analysis

- Analyse field usage and value
- Check cleanup risk before changes

Data Dictionary Builder & User

- Maintain Data Clarity and governance
- Ensure every user understands the data they work with



Close the gaps in your org's security setup in a fraction of the time.

- ▶ Gain full control over permissions access
- ▶ Mass audit, update and maintain

Unified View of Profiles, Permissions, Fields

Quickly identify where users can and cannot access data, with side-by-side comparisons and consolidated tabs for instant visibility.

Mass Updates and Quick Rolls-Back

Save time by applying changes in bulk and revert if needed—perfect for mitigating errors before they cause business disruption.

Excel Exports for Compliance

Seamlessly generate stakeholder-ready documentation for internal audits and external compliance requirements.

- View and mass update security across Profiles, Permissions and Fields on one easy matrix.
- Log changes and revert to previous log settings if needed
- Export permissions to Excel for stakeholder review and documentation
- Query in seconds why users can or cannot access records.
- Review Profiles, Permissions Sets Roles, Record and Group sharing settings side by side.
- See applicable Record Type and Territory Management settings as needed.
- Compare user settings side by side
- Report on fields as they change.
- A new ability to review Profile Access to Layouts across Objects.
- Each tab now offers our new templating feature that allows the saving of selections for easy access in regular audit reports. This allows you to keep a consistent check on the same fields in each template.
- New ability to select permission set groups and review the permissions contained within the group.



Take control of your user management today

- ▶ Optimal control over user management
- ▶ Identify critical user access risks, mitigate and revoke

User Snapshot & Risk Signals

Pick a user and instantly see their key details, what access they've been granted, and any standout risk indicators that suggest over-permissioning or sensitive access.

Login Activity Insights

View a clear timeline of how the user is signing in, including contextual details that help you spot unusual behaviour and support security checks.

Full Access Breakdown + Downloads

See how the user's access is built across objects and fields, sharing/visibility, and system-level privileges—then export the results to share internally or keep as evidence.

- When you select a user, their email profile and any high-risk items will be generated and displayed, along with the available permission sets.
- The User Login History section offers a comprehensive overview of the user's login activity, including source IP address, browser, and platform.
- The Access Risk Score will indicate the critical risks associated with the user, such as modifying all data, granting full access to all records, managing users with full administration privileges, or excessive object access that allows too much data access across the CRM.
- The Access Configuration section provides detailed information relevant to the selected user about available record types, object permissions, field permissions, system permissions, sharing rules access, role hierarchy, user login history, and schema viewer.
- The Record Types table displays the available record types for each object, along with the user's profile and the assignee.
- The Sharing Rules Access table provides information on rules and sharing types, detailing who they are shared with.
- The Object Permissions table shows the CRUD rights status and how they have been assigned to the user, with the option to download this information to CSV and Excel.
- The Field Permissions section expands on object fields for User Read and Edit Rights viewing.
- System Permissions are also displayed, showing the permissions enabled for the user and the profile through which they have access.



Migrate profiles to permission sets in just three clicks—fast, accurate, & audit-friendly.

- › Migrate profiles to permission Sets in 3 clicks
- › Clone users and their related permissions

Pick, Name, & Go

Select the target profile, choose an existing Salesforce license type, and Cloner does the rest—your new Permission Set is ready in seconds.

Track All Migrations

Keep tabs on every clone you've performed, ensuring transparency and saving time on repetitive admin tasks.

Clone users or migrate

Clone a user to another user in seconds, copying across their user settings and assigned permissions

- A 1-2-3 click and go solution for migrating all your profiles quickly and efficiently.
- Use existing Salesforce licence types from the picklist
- Identify the profile you want to migrate to a new permission set
- Name your new permission set
- the app create your new permission set
- check back on the migrations you have completed



Reduce compliance issues with a repeatable, transparent, and trackable security audit process.

- › Streamline your audit process from start to finish
- › Plan, track, document and maintain compliance

Customizable, Guided Audit Workflows

Define deadlines, assign tasks, and monitor progress—all from a user-friendly home tab.

Real-Time Org Health Dashboard

Instantly see which permissions are in use, identify risky or unused settings, and tackle "tech debt" early.

Automated Reminders & Reporting

Schedule compliance reviews so you never miss a critical deadline. Export results to Excel for broader visibility across teams.

- Build an audit process customised with deadlines and comments for your business
- Live overview of permissions health of your org
- Know how many permissions are/are not in use
- Guided actions in the app to resolve issues
- Report on audit results and export results to Excel
- Suite of dashboards highlighting utilized vs unused permissions (tech debt)
- Schedule reminders for permission reviews so you never miss an important deadline for compliance.
- Assign owners to different audit steps and notify them of the details and their responsibilities within the full audit process.
- The tool makes it easier for the owner of the audit process to communicate to their team and make sure nothing gets missed through oversight.



Turn field usage and dependency insight into safer Salesforce change

- › Understand how Salesforce fields are used, what depends on them, and where clean-up can happen safely.

- › Analyse field population and identify low-use fields
- › Expose dependencies across layouts, reports, dashboards, and Apex

See How Your Fields Are Really Being Used

Analyse field population levels to identify fields that are heavily used, rarely populated, or potentially no longer providing value. This gives Admins clear evidence to support clean-up and optimisation decisions.

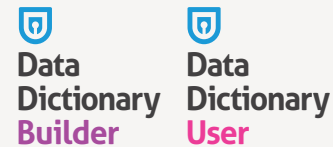
Understand Dependencies Before Making Changes

See where fields are referenced across layouts, reports, dashboards, and Apex. By combining usage and dependency insight, teams can better understand the impact before reviewing or retiring a field.

Make Field Governance Repeatable

Use recommendations, templates, scheduled analysis, and background processing for consistent reviews across objects. Dashboards, email delivery, and exportable reports help track progress & share findings.

- Analyse field population levels across Salesforce objects.
- Identify fields with little or no data.
- See where fields are referenced across page layouts, reports, dashboards, and Apex.
- Combine field usage and dependency insight to support safer clean-up decisions.
- Use automated recommendations to flag fields for review based on agreed criteria.
- Analyse multiple objects in a single run.
- Create reusable templates for repeatable analysis.
- Schedule analyses to run automatically.
- Share analysis results by email.
- Run larger analyses through background processing.
- Track analysis progress and governance activity through dashboards.
- Export reports to support audits, compliance reviews, and stakeholder discussions.
- Support ongoing data model governance, technical debt reduction, audit preparedness, and platform optimisation.



Improve data literacy and security by reducing risks & confusion of data handling.

- › Maintain Data Clarity and governance
- › Document critical data fields, objects and permissions

- › Empower end users with role-specific data dictionaries
- › Ensure every user understands the data they work with

Profile & Permission-Set Dictionaries

Grant teams easy access to definitions while controlling who can view and edit sensitive information.

Centralized Field Documentation

Update descriptions and help text in one place, streamlining data governance across your org.

Sensitive Data Tracking

Identify and classify fields subject to data-protection regulations (GDPR, HIPAA, etc.) and quickly produce compliance reports.

- Dashboard view analyses how well the object field descriptions are completed.
- View and create Profile and Permission Set specific dictionaries for object fields in the org.
- Search for specific fields to review.
- Update field description and help text on one screen, live within the org.
- Track and classify Sensitive Data easily.
- Produce a compliance report showing which fields are subject to specific data protection.
- Give users access to dictionaries with Data Dictionary Viewer.
- Users can reference field descriptions and help texts to assist them with precise data input.
- Users can only view within their permissions



Effortlessly manage thousands of reports with filters, mass archiving, & export-ready insights.

- › Effortless cleanup and optimization of reports
- › Mass organize, archive, move or delete

Identify & Archive Unused Reports

Quickly see which reports are outdated or rarely accessed, then mass delete or archive them to reduce clutter.

Monitor Report Types

Understand which report types are still needed and remove redundancies.

Schedule & Automate

Query reports by creation or last-run date to make sure your dashboards remain current.

Generate Business Cases

Quantify the time or cost savings of a thorough cleanup, helping you justify housekeeping efforts.

- Identify Reports not run in specified time frame.
- Archive or mass delete Reports now or create a schedule.
- Review intel for Filtered, Scheduled, Subscribed and Shared Reports in Folders and Dashboards
- Report showing which reports are built on which report type informs you to make the decision to remove redundant custom report types - useful if you are hitting the Salesforce limit.
- A brand-new capability to allow you to query reports based on created date, last modified, and created by values
- 'Generate Business Case' button. Allowing you to quantify the amount of effort it would take to clean up reports manually, building credibility with management and actively encourages report management and auditing, keeping everything under control.
- Ability to delete archived reports individually rather than all at once, for those 'let's wait and see' moments when you're not 100% sure no one wants the report anymore.



Suite Package Pricing

Security + Access Manager is available as a suite or as individual modules.

Support and expert services available.

Security + Access Manager Suite

For Salesforce®

Full App Suite
Includes all core
and sub modules

Permissions
Manager
Pro

Ultimate
User
Manager

Instant
Permissions
Cloner

Permissions
Audit
Planner Pro

Field
Trip
Analysis

Report
Manager
Pro

Data
Dictionary
Builder

Data
Dictionary
User

\$8,500
per admin license

Example Pricing Model: Typically customers buy X admin licenses for their Salesforce team members that need full access, but read only licenses are available for example where they need to allow auditors access to run reports. *Read only licenses are available when purchased in addition to a full admin license. Contact us for pricing/details. End user viewing for our data dictionary user tab is priced at \$1 per user but tiered pricing available.

Individual Module Pricing

MODULE	MODULE	MODULE	MODULE	MODULE	MODULE	MODULE	MODULE
 Permissions Manager Pro	 Ultimate User Manager	 Instant Permissions Cloner	 Permissions Audit Planner Pro	 Field Trip Analysis	 Report Manager Pro	 Data Dictionary Builder	 Data Dictionary User
\$3,750 per admin license	\$2,750 per admin license	\$1,500 per admin license	\$1,500 per admin license	\$1,500 per admin license	\$1,500 per admin license	\$1,500 per admin license	\$1 per user Tiered pricing available

Ready to Simplify Your Salesforce Security, Data, & Reporting?

Contact us to learn how the Security + Access Manager Suite can help your organization stay secure, compliant, and efficient—without the headaches. [Click here to view on the Salesforce App Exchange.](#)



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