Security + Access Manager Suite

For Salesforce®

One modular Salesforce suite for security, access, data and reporting governance.

- 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 brings permissions, user access, audit planning, field governance, data dictionaries and report management into one connected toolkit, helping Salesforce teams reduce risk, remove technical debt and maintain stronger governance across the org.

Suite-wide capabilities

+ Org health & unused access monitoring
+ Privileged access governance
+ Repeatable audit & review workflows
+ Actionable security, metadata, field and reporting intelligence.

ApplicationPerfection

Security + Access Manager Suite

For Salesforce®

Here's why Admins choose the Security + Access Manager Suite

The Security + Access Manager Suite gives Salesforce teams a connected set of tools to manage permissions, user access, audits, metadata, fields, reports and dashboards from one place.

Admins can identify security and access risks, streamline permission reviews, reduce technical debt, improve documentation and make safer clean-up decisions across the org. The result is stronger governance, greater visibility and less time spent on repetitive Salesforce administration.



Permissions Manager Pro	Compare, audit, update and export permissions; investigate record access and security configuration.
Ultimate User Manager	Analyse effective user access and risk, identify high-risk users and remediate excessive access.
Instant Permissions Cloner	Migrate Profiles to Permission Sets, clone users and permissions, manage licences and consolidate Permission Sets.
Permissions Audit Planner Pro	Build repeatable audits, assign owners, monitor permission health and schedule compliance reviews.
Field Trip Analysis	Measure field population and dependencies to assess usage and support safer cleanup decisions.
Report Manager Pro	Govern reports with usage intelligence, bulk cleanup, scheduling, Report Type analysis and audit insights.
Data Dictionary Builder & User	Document and classify Salesforce fields, then give users permission-aware, read-only access to relevant data dictionaries.

Permissions Manager Pro

Audit and manage Salesforce permissions at scale

- Compare, audit and manage permissions across Profiles, Permission Sets & fields
- Identify access risk, investigate record access and produce audit-ready evidence

See Permission Risk Clearly

Monitor permission health across your org and identify unused Profiles, Permission Sets, Permission Set Groups, Roles and Public Groups, alongside privileged access that may require review.

Make Changes Safely

Compare and update object and Field-Level Security, with logged changes, historical snapshots and rollback to reduce administration risk.

Investigate & Evidence Access

Understand why users can or cannot access records, analyse security configuration and export structured evidence for audits and reviews.

- **Monitor org permission health** and identify unused Profiles, Permission Sets, Permission Set Groups, Roles and Public Groups.
- **Compare and update object permissions and Field-Level Security** across Profiles and Permission Sets.
- **Investigate record access** to understand why a user can or cannot access a specific Salesforce record.
- **Track and reverse permission changes** using audit snapshots, historical comparison and rollback.
- **Run 40 pre-built security and configuration reports** or build reusable Customisable Intel reports.
- **Define and analyse privileged access**, including where sensitive permissions originate and which users receive them.
- **Review and manage Role Hierarchies**, including role structures, assignments and user movement.
- **Export permissions at scale** across objects, fields, tabs and System Permissions for audit and stakeholder review.

Ultimate User Manager

Understand and control user access from one place

- Analyse effective user access and identify high-risk users across your Salesforce org
- Trace how access is granted, investigate risk and remediate excessive permissions

Identify User Risk Faster

See an individual user's risk score, critical findings and assigned permissions, or review high-risk users across the organisation to quickly focus attention where it matters most.

See How Access Is Built

Understand a user's effective access across objects, fields and System Permissions, including the Profiles, Permission Sets and Permission Set Groups contributing to that access.

Investigate & Remediate Access

Drill into risky access, review the permissions contributing to it and take action by granting or revoking Permission Sets or adjusting supported object permissions directly.

- **Analyse individual user risk** with numerical risk scores, critical findings and Quick Look investigation.
- **Identify high-risk users across the org** with Critical, High, Medium and Low risk classifications.
- **Review effective object, field and System Permission access** across Profiles, Permission Sets and Permission Set Groups.
- **Trace the source of object permissions** and identify duplicate access granted through multiple permission sources.
- **Grant and revoke Permission Sets** with licence-aware assignment and risk-based recommendations for remediation.
- **Review Record Types, Sharing Rules and Role Hierarchy access** to understand the wider context behind a user's visibility.
- **Investigate Login History and Setup Audit Trail activity** to understand how a user is accessing Salesforce and what configuration changes they have made.
- **Visualise object relationships and effective access** through an interactive Schema Viewer with access-based colour coding.

Instant Permissions Cloner

Clone, migrate and consolidate Salesforce access faster

- Migrate Profiles to Permission Sets and clone access without manual rebuilds
- Manage licences and consolidate Permission Sets to simplify access admin

Migrate Permissions Faster

Create a new Permission Set from an existing Profile, copying supported object, field, system and setup permissions while leaving the original Profile unchanged.

Clone Users with Confidence

Create a new Salesforce user from an existing user or copy access to an existing user, with a pre-clone review of the permissions, assignments and configuration that will be carried across.

Simplify Access Administration

Monitor Salesforce licence utilisation, identify inactive licence holders and consolidate multiple Permission Sets into a cleaner access model with compatibility checks before changes are applied.

- **Migrate Profiles to Permission Sets** by copying supported object, field, system and setup permissions into a new Permission Set.
- **Quick Assign Permission Sets** to multiple users after cloning, with licence compatibility validation and assignment results.
- **Clone users to new Salesforce users** including supported Profiles, Roles, Permission Sets, Public Groups and user preferences.
- **Clone access to existing users or create replacements**, supporting onboarding, handover and offboarding scenarios.
- **Track Profile and user cloning activity** through dedicated cloning history and recent migration visibility.
- **Analyse Salesforce licence utilisation** across User Licences, Permission Set Licences and Package Licences, including users with no login in 90 days.
- **Bulk assign and unassign supported licences** across multiple users from one central licence-management interface.
- **Merge multiple Permission Sets into one consolidated set**, with compatibility checks, optional user reassignment and a pre-merge overview of permissions and elevated access.

Permissions Audit Planner Pro

Turn Salesforce permission reviews into a repeatable audit process

- Build structured audits, assign owners and keep permission reviews on schedule
- Monitor permission health, track review history and govern privileged access

Build Repeatable Audit Workflows

Create reusable audit templates with customised steps, owners, review dates and supporting comments, giving your organisation a consistent process for recurring security and compliance reviews.

Keep Permission Health Under Review

Monitor unused Profiles, Permission Sets, Permission Set Groups, Roles and Public Groups, record when key areas were last reviewed and identify findings that require further investigation.

Govern Privileged Access

Define which permissions and access structures your organisation considers privileged, then identify which users receive that access and where it originates to support least-privilege and compliance reviews.

- **Monitor organisation permission health** with an overall health score and visibility into unused Profiles, Permission Sets, Groups and Roles.
- **Create reusable audit templates** with fully customisable steps, review dates, comments and audit requirements.
- **Assign audit-step owners and track responsibility**, including assignment history for individual review activities.
- **Schedule audit and permission-review reminders** with owner-specific notifications and recurring review frequencies from daily to yearly.
- **Run structured permission reviews** across Profiles, Permission Sets, Permission Set Groups, Roles and Public Groups, with unused-access metrics and recommended actions.
- **Track when key security areas were last reviewed**, creating a persistent record of ongoing permission governance.
- **Classify and maintain privileged permissions** across System Permissions, Custom Permissions, Profiles, Permission Sets and Permission Set Groups, including bulk CSV maintenance.
- **Generate audit and privileged-access evidence** through spreadsheet exports and reports showing which users receive sensitive access and how it is assigned.

Field Trip Analysis

Turn field usage insight into safer Salesforce cleanup

- **Measure how fields are actually used and identify empty, low-use or redundant fields**
- **Understand dependencies, layouts and access exposure before deciding what can safely change**

See How Fields Are Really Used

Analyse field population across Salesforce objects, view exact populated-record counts and drill into the records using a field to understand whether it is genuinely providing value.

Understand Risk Before Cleanup

Combine field population with page-layout visibility, security exposure and dependencies across automation, Flows, code, reports, dashboards and UI components to assess the impact of changing or retiring a field.

Make Field Governance Repeatable

Use multi-object analysis, reusable templates, recurring schedules, historical results and automated report delivery to turn one-off cleanup projects into an ongoing field-governance process.

- **Analyse field population and data quality** across standard, custom and optional managed-package fields.
- **Identify empty and low-use fields** with exact population percentages, populated-record counts and automated Keep, Review or Remove recommendations.
- **Drill into populated records** to see where a field is being used, its value and when it was last changed.
- **Assess field deletion risk** using population, security exposure, layout visibility and dependency evidence.
- **Expose dependencies across automation, Flows, code, reports, dashboards and UI components** before making changes.
- **Analyse usage by Record Type** to identify fields that may appear unused overall but remain important to a specific business process or segment.
- **Run analyses across up to five objects**, with Record Type, date-range and custom SOQL filtering for more targeted reviews.
- **Create reusable templates and recurring analyses**, with automated email delivery, exports and historical results to support ongoing governance.

Data Dictionary Builder

Data Dictionary User

Turn Salesforce metadata into trusted, accessible documentation

- **Centralise and maintain field, object and permission documentation across your Salesforce org**
- **Give users permission-aware access to the definitions and governance information relevant to their role**

Build a Trusted Data Dictionary

Review and maintain field descriptions, Help Text, sensitivity, usage and compliance classifications from one central workspace, with visibility into how complete your Salesforce documentation is.

Govern Metadata Consistently

Review documentation across fields, custom objects, Profiles, Permission Sets and Permission Set Groups, make changes in bulk and use controlled deployment where supported to apply updates back to Salesforce.

Put Documentation in Users' Hands

Give end users a read-only dictionary that automatically respects their Salesforce object and Field-Level Security, while controlling which metadata categories different users, Profiles and Permission Sets can view.

- **Centralise field documentation** including Description, Help Text, Sensitivity, Field Usage, Highlighted Data and Compliance Category.
- **Measure documentation completeness** across Salesforce fields, objects, Profiles, Permission Sets and Permission Set Groups.
- **Classify sensitive and regulated data** using defined sensitivity, lifecycle and compliance categories such as PII, GDPR, HIPAA and PCI.
- **Review and update metadata in bulk**, with controlled review and deployment for field and object changes where supported.
- **Create permission-aware dictionary views** using Profiles and multiple Permission Sets to focus documentation on relevant fields.
- **Give end users read-only access to approved documentation** while respecting their existing object permissions and Field-Level Security.
- **Control dictionary content by User, Profile or Permission Set**, allowing different audiences to see the metadata categories appropriate to their role.
- **Export dictionary and documentation data to Excel** for offline review, governance activity, stakeholder discussions and audit support.

Report Manager Pro

Clean up and govern Salesforce reports at scale

- Identify report clutter, inactivity & dependencies before deciding what needs attention
- Bulk manage reports and maintain ongoing governance with automation, intelligence and audit history

See Where Cleanup Is Needed

Understand the scale of your Salesforce reporting, identify reports unused for months, flag those tied to inactive users, and use targeted filters to focus reviews on what matters.

Take Action at Scale

Move, archive, delete and export multiple reports without managing them individually, then automate recurring archive or deletion processes using your chosen report criteria.

Govern Reporting Continuously

Go beyond clean-up with insight into report structure, Report Types, field usage, subscriptions, schedules, dashboards and folder access, retaining activity history for ongoing oversight.

- **Analyse report usage and inactivity** across the org, including reports not run for 3, 6 or 12 months, inactive-user reports and estimated cleanup effort.
- **Build targeted report inventories** using folders, inactivity periods, creation dates, users and other filters to focus cleanup and governance activity.
- **Bulk move, archive, delete and export reports** across large result sets, with archive history and previous-folder visibility.
- **Automate recurring report cleanup** with scheduled archive or deletion rules based on report inactivity and the current query criteria.
- **Schedule & distribute Salesforce reports** by email, with recurring delivery, attachments, report links and the option to omit empty reports.
- **Inspect and manage individual reports in depth,** including filters, fields and descriptions, compare reports side by side and edit supported report filters directly from RMP.
- **Analyse Report Types, field usage and reporting dependencies,** including which fields are used in filters, groupings, columns and aggregates and which reports feed dashboard components.
- **Strengthen reporting governance with access, history and dashboard intelligence**, including report access sources, subscriptions, scheduled reports, folder sharing and long-term report activity tracking.

Suite Package Pricing

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

Support and expert services available.

Security + Access Manager Suite

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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 2 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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