

Manual Sharing in Salesforce

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Consider a scenario where security setting is too restrictive in your org. If there is a need to share some specific record with only couple of users or group and that too for **one time sharing**, instead of changing OWD setting or profile level setting or creating a permission set you can share those records manually directly from records detail page.

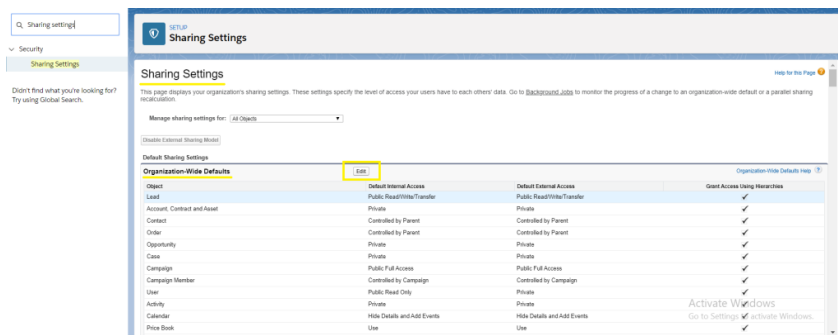
How to Enable Sharing button in detail page.

Step 1: Go to setup, in quick search type “Sharing Settings”, Click on Sharing Settings.

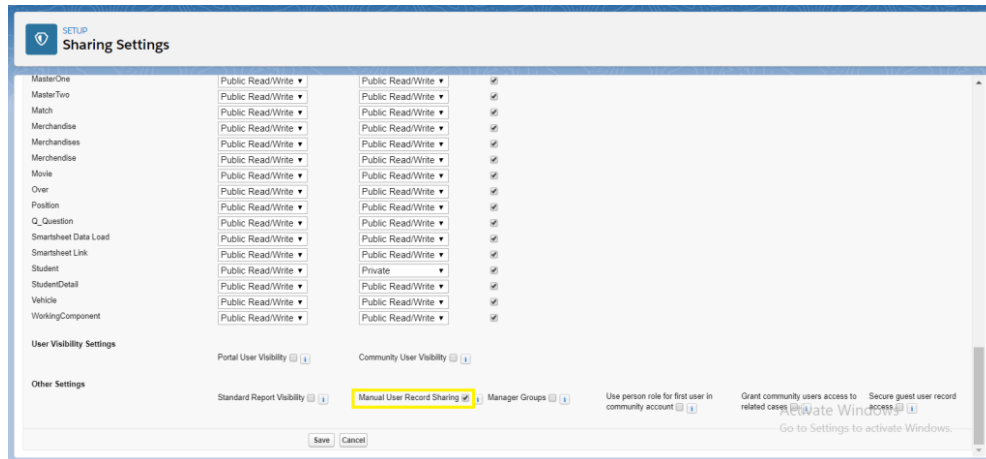
Step 2: In Organization-wide Default section, click “Edit”

Step 3: Select the Manual User Record Sharing checkbox to display the Sharing button on user detail pages, which enables users to share their records with others. Or deselect the checkbox to hide the button, which prevents users from sharing their user records with others.

Step 4: Click “Save”.



Organization-wide Default (Sharing Setting)



Other section section of OWD

Once the permission is given user can see the Sharing button in detail page of a record.

Note: Sharing button is available in Salesforce Classic version only.

You can create a custom workaround to share record Manually in lightning. Or there are some app exchange applications which can help you.

How to grant access to a record with Manual sharing.

Switch to classic version of salesforce if you are in lightning version.

Open a record that you want to share manually, go to detail page of that record.

test1 [Customize Page](#) [Edit Layout](#) [Printable View](#) [Help It](#)

[Hide Feed](#)

[Post](#) [File](#) [New Task](#) [More](#) [Follow](#)

Write something... [Share](#) [Followers](#)

[Show All Updates](#)

There are no updates.

[Back to List: Accounts](#)

[Contacts \(0\)](#) | [Open Activities \(0\)](#) | [Activity History \(0\)](#) | [Opportunities \(0\)](#) | [Cases \(0\)](#) | [Notes & Attachments \(0\)](#) | [Partners \(0\)](#) | [Students \(0\)](#)

Account Detail [Edit](#) [Delete](#) [Sharing](#) [Include Offline](#) [Manage External Account](#)

Account Owner	Akhil Kulkarni (Change)	Rating
Account Name	test1 (View Hierarchy)	Phone
Parent Account		Fax
Account Number		Website
Account Site		Ticker Symbol
Rollmeup		
Amount		
LinkedIn Profile		
Billing Address		
Active		
	Shipping Address	
	Upsell Opportunity	
	Number of Locations	

Activate Windows
Go to Settings to activate Windows.

Detail page of record (Classic version of salesforce)

Click on Sharing button, system will take you to sharing detail page.

Sharing Detail
test1 [Help for this Page](#)

This page lists the users, groups, roles, and territories that have sharing access to **test1**. Click **Expand List** to view all users who have access to it.

View: [All](#) [Edit](#) [Create New View](#)

[Add](#) [Expand List](#)

Action	Type	Name	Account Access	Opportunity Access	Case Access	Reason
Edit	User	Akhil Kulkarni	Full Access	Read/Write	Read/Write	Owner

Explanation of Access Levels

- Full Access - User can view, edit, delete, and transfer the record. User can also extend sharing access to other users.
- Read/Write - User can view and edit the record, and add associated records, notes, and attachments to it.
- Read Only - User can view the record, and add associated records to it. They cannot edit the record or add notes or attachments.
- Private - User cannot access the record in any way.

*Sharing
Detail
Page*

Click on Add button, system will take you to New Sharing page.

New Sharing [Save] [Cancel]

Sharing Information

Search: for: [Find]

Available

- All Customer Portal Users
- All Internal Users
- All Partner Users
- Group: My group

Share With

--None--

[Add] [Remove]

Account Access

Opportunity Access

Case Access

[Save] [Cancel]

New Sharing form

In New Sharing page you can find the search picklist, select the type of group, user, role, or territory to add.

Basic default options available in picklist are as follows.

Type	Description
Public Group	All public groups defined by your administrator.
Roles	All roles defined for your organization, including all users in each role.