

Manual sharing in Salesforce

Manual sharing allows users to grant one-off access to their individual records for users, roles, and public groups.

Manual sharing is available:

1. To the record owners, their managers in the role hierarchy, and administrators.
2. For objects set as public read-only or private in organization-wide defaults.

1. Click "Sharing" button.

The screenshot shows a Salesforce interface for an account named 'Infallible'. At the top, there's a header with the account name and a 'Hide Feed' button. Below this is a feed area with a 'Post' button and a text input field. A post from 'Magulan D' is visible, stating 'changed Account Name from CTS to Infallible.' Below the feed, there's a navigation bar with links for 'Contacts [1]', 'Opportunities [2]', 'Cases [0]', 'Open Activities [0]', and 'Accounts [0]'. The 'Account Detail' section is highlighted, showing fields for 'Account Owner', 'Account Name', 'Parent Account', 'Account Number', 'Account Site', 'Type', and 'Industry'. The 'Sharing' button is highlighted with a red box.

Infallible

Hide Feed

Post File Link Poll

Write something... Share

Show: All Updates Sort by: Post Date

Magulan D changed Account Name from CTS to Infallible.
Comment · Like · 14 August, 2013 at 11:45 AM

Contacts [1] | Opportunities [2] | Cases [0] | Open Activities [0] | Accounts [0]

Account Detail Edit Delete **Sharing** Include Offline

Account Owner Magulan D [Change] Sharing

Account Name Infallible [View Hierarchy]

Parent Account


Account Number 123

Account Site

Type

Industry Engineering

2. Click "Add" button.

 Sharing Detail
Infallible
Infallible

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

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


A | B | C | D | E | F | G | H | I | J |

User and Group Sharing Add Expand List					
Action	Type	Name ↑	Account Access	Contact Access	Opportunity Access
Edit	User	Maqulan D	Full Access	Read/Write	Private

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.

3. Select the users and access.

 **New Sharing**

Account: Specify the sharing for this record. You can share this record and its related data with particular role plus all of the users in roles below that role.

Individual sharing can only be used to grant wider access to data, not to restrict access.

New Sharing

Save **Cancel**

Sharing Information

Search: for: **Find**

Available

User: Infallible Techie Site Guest User
User: Magulan D
User: Test3

Share With

User: Test1
User: Test2

Add

Remove

Account Access

Read Only

Contact Access

Read Only

Opportunity Access

Read/Write

Case Access

Read Only

Save

Cancel

Output:

Sharing Detail
Infallible

Help for this Page

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

View: **All** | Edit | Create New View

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

User and Group Sharing							User and Group Sharing Help
Action	Type	Name	Account Access	Contact Access	Opportunity Access	Case Access	Reason
Edit	User	Magulan D	Full Access	Read/Write	Private	Private	Owner
Edit Del	User	Test1	Read Only	Read Only	Read/Write	Read Only	Manual Sharing
Edit Del	User	Test2	Read Only	Read Only	Read/Write	Read Only	Manual Sharing

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The users who can manually share records are

1. Record Owner.
2. Administrator.
3. User above the role of the Record Owner's role.

Note:

You cannot manually share a contact which not linked to an account.