22 Ways To

Share Records in Salesforce

Agenda

- [ ] Forces that Influence Sharing
- [ ] 22 Ways to Share Records in Salesforce

Related Blog

If you haven't already, please navigate to the following blog post URL before starting with this guide. The post contains useful information and links to relevant resources including the option to download the PDF copy of the presentation

http://www.asagarwal.com/ways-to-share-records-in-salesforce

Agenda

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- 22 Ways to Share Records in Salesforce

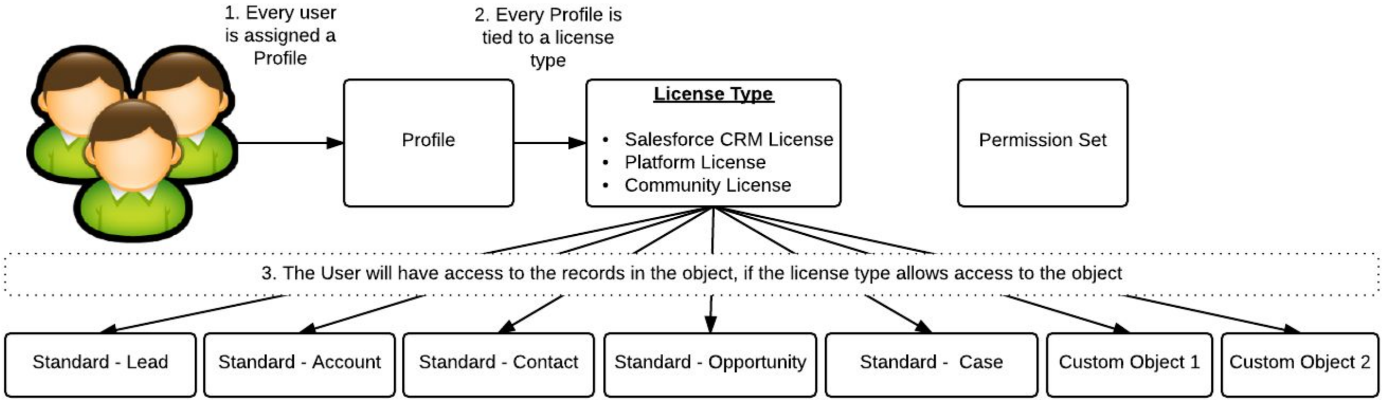
Forces that Influence Sharing

Before you start with sharing rules, be aware of the following forces that will restrict you from sharing records in objects with a user

- **License Type**
- **Profile**
- **Permission Set**
- **System Permissions**

Forces that Influence Sharing - License Type

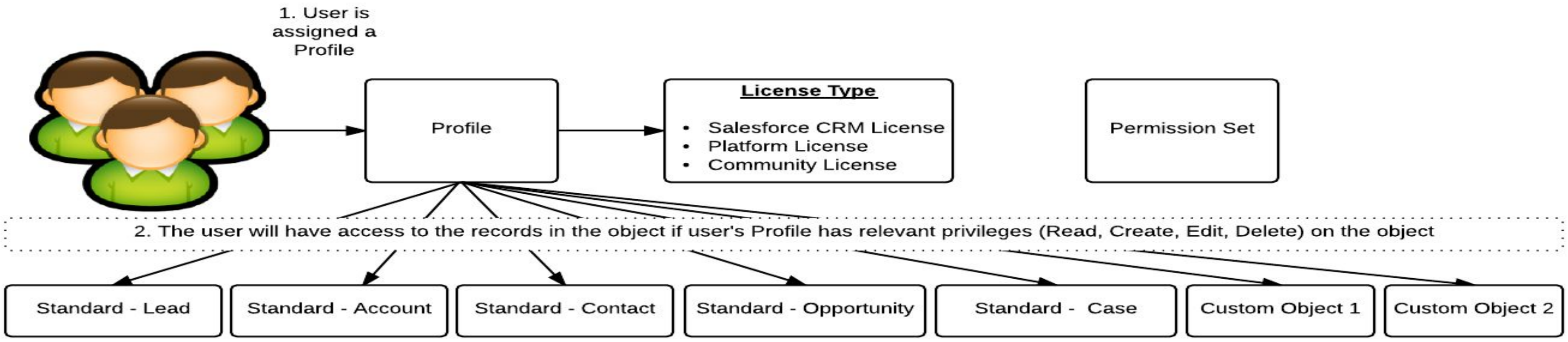
- **Each profile is tied to a specific Salesforce License which determines the objects a user can access. E.g.**
  - **Platform Licenses do not allow to access standard salesforce objects except Account, Contact, Task & Events**
  - **Some of the Community Licenses do not allow access to objects like 'Lead', 'Opportunity'**



E.g.: Salesforce Plaform License to do not allow access to any standard object except Account, Contact, Task, Event
E.g. "Customer Community" license does not allow access to "Lead" object

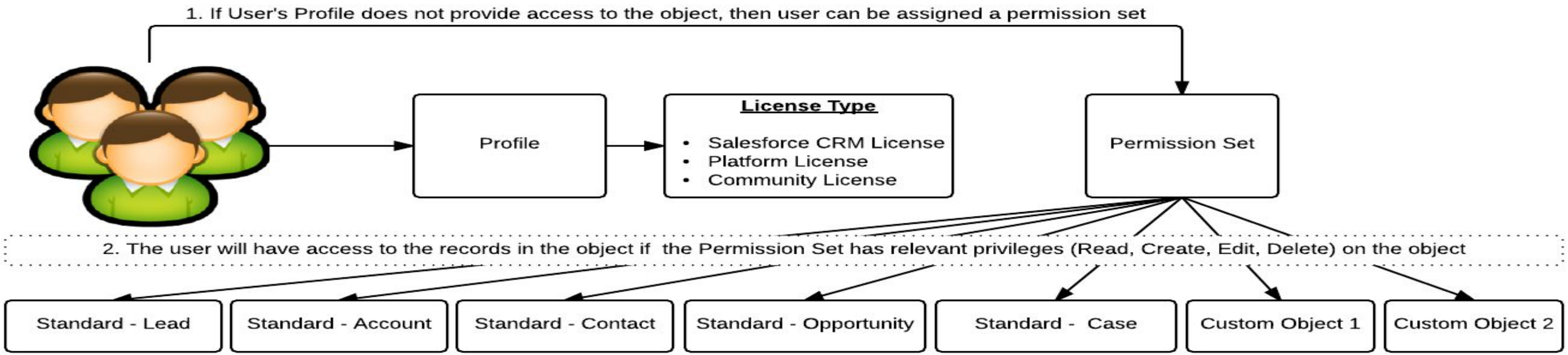
Forces that Influence Sharing - Profile

- Access to objects are granted through the profile assigned to the user and so sharing rules will work only if the profile assigned to the user has the relevant (Read, Create, Edit, Delete) privileges on the object



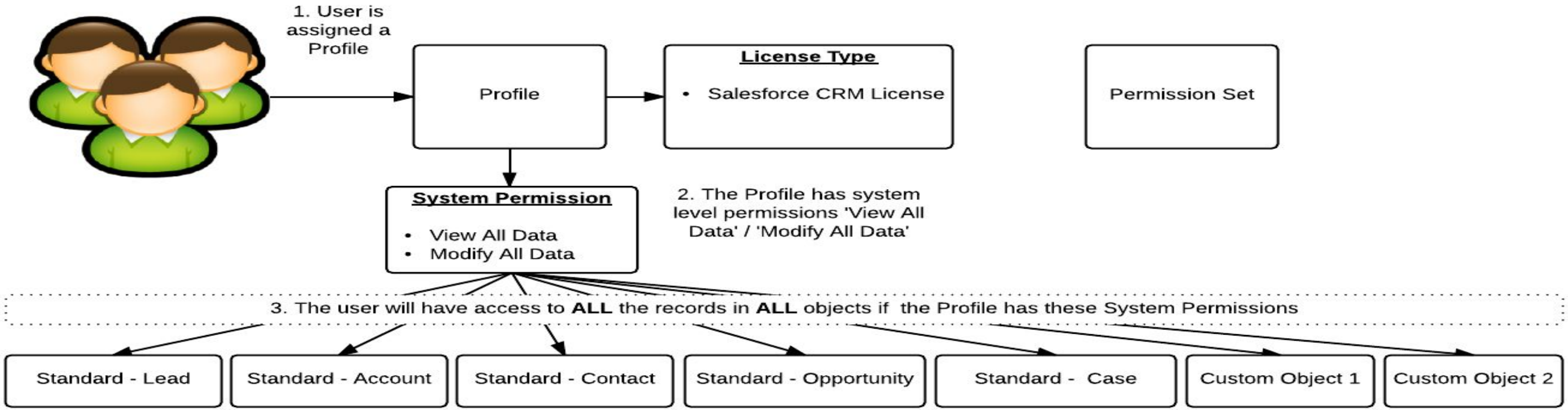
Forces that Influence Sharing - Permission Set

- Access to objects can also be granted through permission set assigned to the user and so sharing rules will also work if permission set assigned to the user has the relevant (Read, Create, Edit, Delete) privileges on the object



Forces that Influence Sharing - System Permission

- **If you grant user's profile system permissions like 'View All Data' and/or 'Modify All Data', then the user can view/edit ALL the records on ALL the objects. Sharing Rules become irrelevant in this case**



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22 Ways to Share Records in Salesforce

1. Profile / Permission Set Level Object Settings (CRED)
2. Profile / Permission Set Level Object Settings (View All, Modify All)
3. Profile Level System Permissions (View All Data, Modify All Data)
4. Organization Wide Defaults (OWD)
5. Record Ownership
6. Role Hierarchy
7. Teams
8. Queues
9. Sharing Rules
10. Groups
11. Manager Group
12. Territory Management
13. Sharing Sets
14. Sharing Groups
15. Super User Access
16. Manual Sharing
17. Programmatic / Apex Sharing
18. Visualforce with Apex
19. Implicit Sharing
20. Master-Detail Relationship
21. Account Relationship Data Sharing
22. External Account Hierarchy

1. Profile / Permission Set Level Object Settings

- **The first minimum thing that the user needs to have is 'Read', 'Create', 'Edit' or 'Delete' (CRED) permission on the object in question either through their Profile or through Permission Set**
- **In fact the user's profile/permission set must have these object level permissions for other sharing options listed in this presentation to work**
- **For profiles tied to specific license types, (e.g. Community User Licenses), you can't set CRED on some of the objects. E.g. for "Customer Community" License, the 'Lead' object is not available**

2. Profile / Permission Set Level Object Settings
(View All / Modify All)

- The next option that you have is to grant 'View All' and/or 'Modify All' at the object level
- Once these permissions are granted to the user's profile/permission set, they can view/edit all records in that object, irrespective of the sharing model
- For profiles tied to specific license types, (e.g. Community User Licenses), view all / modify all options will not be available on some of the objects

3. Profile Level System Settings
(View All Data, Modify All Data)

- Probably one of the most powerful permission that you can grant is to specify 'View All Data' / 'Modify All Data' at the system level on user's profile. With this option, the user will be able to view/modify all records across all objects
- For profiles tied to specific license types, (e.g. Platform License, Community User Licenses), view all data / modify all data system privilege is not available
- Use this option sparingly and with caution

4. Organization Wide Defaults (OWDs)

- Another way to grant users access to records is by setting the OWD to "Public Read Only" or "Public Read/Write" for individual objects
- When set to "Public Read Only" or "Public Read/Write", ALL users in your Org will have view/edit privileges provided the user has CRED permissions on the object(s) through profile/permission set

5. Record Ownership

- If the user is the owner of the record, they automatically have read/edit/transfer privileges on that record
- However, if you have removed the object level CRED permission from user's profile/permission set, then they won't be able to view/edit the records EVEN IF they are the owner of the record
- This can happen if the user's profile/permission set had CRED privileges, they created some records and later CRED permissions were removed

6. Role Hierarchy

- All the users who are above in the role hierarchy chain of the user who has access to the records, will automatically inherit the same permissions as their subordinates on that record
- For Custom Objects 'Grant Access Using Hierarchies' must be checked in Setup -> Sharing Settings. This is checked by default for Standard Objects
- User must have CRED permissions on the object(s) through profile/permission set
- Exception
  - Community users having 'Customer Community' license type cannot be assigned a role and hence this rule does not apply to them

7. Teams (Account, Case, Opportunity)

- To share records in Account, Case & Opportunities, you can enable teams and add user to the team
- For each user being added to the team, you can define whether they can just 'View' the record or 'Edit' the record. In case of 'Account Team', you can also define whether the users in the 'Account Team' has access to the 'Cases' & Opportunities' for that Account
- User must have CRED permissions on the object(s) through profile/permission set
- Exception
  - Community users having 'Customer Community' license cannot be added to the team and hence this rule does not apply to them

8. Queues

- You can create Queues in Salesforce, assign the user to the queue and set the queue as the owner of the record
- Users assigned to the queue will then automatically have "Owner" like access to those records
- User must have CRED permissions on the object(s) through profile/permission set
- Exception
  - You can't set the queue as the owner on the 'Account' object
  - Community users having 'Customer Community' license cannot be added to the queue and hence this rule does not apply to them

9. Sharing Rules

- Create Sharing Rules on the object. Your can define the following type of sharing rules
  - Ownership Based Sharing Rule - Where you can share records owned by a specific set of users with another specific set of users
  - Criteria Based Sharing Rule - Where you can share records meeting a specific criteria with specific set of users (E.g. share All Accounts where City = 'San Francisco' with all users in in 'Salesreps - US - West' role
- User must have CRED permissions on the object(s) through profile/permission set
- Exception
  - Cannot be used for sharing records with Community users having 'Customer Community' license type

10. Groups

- You can create Groups in Salesforce and assign users to the groups (you can also assign roles, territories or other groups to a group)
- Then use Sharing Rules to grant access to the records to this group of users
- User must have CRED permissions on the object(s) through profile/permission set
- Exception
  - Community users having 'Customer Community' license type cannot be added to groups and hence this rule does not apply to them

11. Manager Group

- You can enable 'Manager Group' sharing option to share records with the 'Manager' of user defined on the 'User' Object
- Use Manager groups to share records with your management chain instead of all managers in the same role based on the role hierarchy
- Then use Sharing Rules to grant access to the records to this group of users
- User must have CRED permissions on the object(s) through profile/permission set
- Exception
  - Manager groups can contain Standard and Chatter Only users only and doesn't include portal users

12. Territory Management

- Another powerful way to share records with users - Create Territories and assign users to territories
- For sharing Account records, define the Account Assignment rule on the Territories
- For sharing records in other objects, define sharing rules and use Territories in the sharing rules
- User must have CRED permissions on the object(s) through profile/permission set
- Exception
  - Community users having 'Customer Community' license type cannot be assigned to territories and hence this rule does not apply to them

13. Sharing Set

- Use Sharing Set to share records with users having community license type. This includes customer community, customer community plus and partner community
- Previously this was applicable only to the 'Customer Community' license type. But since Salesforce Winter ‘19 release, Sharing Set has been made available to all community licenses.
- User must have CRED permissions on the object(s) through profile/permission set
- Sharing Set is only applicable for community users. It is not applicable for any other user type

14. Sharing Group

- Use this option to share records created by ‘Community’ users with other internal/community users
- Works together with Sharing Set
- While Sharing Set is used to share records created by other users with ‘Community’ license users, sharing Group is used to share records created by ‘Community’ license users with other users
- User must have CRED permissions on the object(s) through profile/permission set

15. Super User Access

- Applicable only for users with license type ‘Partner Community’ & ‘Customer Community Plus’
- Used to share records created by the community user belonging to the same Account
- User must have CRED permissions on the object(s) through profile/permission set

16. Manual Sharing

- Owner of a record / person higher in the role hierarchy of the owner / System Administrator, can grant manual access to other users, groups, roles. This is done manually on record by record basis
- Important: If you change the owner of the record or transfer the record to someone else, Salesforce will remove all the manual sharing
- User must have CRED permissions on the object(s) through profile/permission set
- Exception
  - Cannot be used to share records with Community users having 'Customer Community' license type

17. Programmatic/Apex Sharing

- You can also share records with other users, groups, roles programmatically.
- This is usually done by defining a sharing reason and inserting a record in <object_name>__share object
- A use case is you want to share the ‘Job’ record with the Hiring Manager of that job. So as soon as the hiring manager is assigned to the job record, the record should then automatically be shared with that hiring manager. This is achieved by writing a trigger on the ‘Job’ object and using programmatic sharing
- User must have CRED permissions on the object(s) through profile/permission set
- Exception
  - Cannot be used to share records with Community users having 'Customer Community' license type

18. Visualforce with Apex

- If nothing else works, then you can create a Visualforce Page with Custom Apex Controller in "without sharing" mode and grant users view/edit access to the record.
- This option requires heavy custom development and maintenance.
- Before going down this route, do ensure that you will not be flouting Salesforce licensing rules when exposing records through this method. E.g. Salesforce Licensing model does not grant access to 'Lead' object to Customer Community Plus users. If you are creating a Visualforce page with Custom Apex Controller to expose lead object records to Customer Community Plus user, this may not be allowed

19. Implicit Sharing

- Salesforce grants implicit access to the records when you have access to other related records.
  - For example if you have access to a 'Contact', 'Case' or 'Opportunity' record, Salesforce will grant you implicit read only access to the corresponding Account. This is known as ‘Implicit Parent’
  - Or if you have access to the Account through Role Hierarchy / Account Team and have selected the option to grant access to 'Contact', 'Case' or 'Opportunity' when defining Account Team or Role Hierarchy, then Salesforce will grant you implicit Access to 'Contract', 'Case', or 'Opportunity' records. This is known as ‘Implicit Child’
- User must have CRED permissions on the object(s) through profile/permission set

20. Master-Detail Relationship

- If you have objects in Master-Detail relationship, then the sharing rules defined on the master automatically cascades to the object on the 'Detail' side of the relationship
- You cannot define separate sharing rule on the child object as the sharing rules are inherited from the Master
- This means that if a user has 'View' access on a record in the Master object, he will also be able to view the corresponding child records in the detail object
- User must have CRED permissions on the object(s) through profile/permission set

21. Account Relationship Data Sharing Rule

- Introduced in Salesforce Spring ‘19 release, use Account Relationship Data Sharing Rule to share records owned by the users of one account with users of another account (e.g. share records between partners)
- This feature is for sharing the records between community users only
- For example, if you want to share cases created by users of Company ‘A’ with the users of company ‘B’. The users of company A & B are Salesforce community users
- You can apply account relationship data sharing rules to accounts, campaigns, cases, contacts, custom objects, leads, opportunities, orders
- User must have CRED permissions on the object(s) through profile/permission set

22. External Account Hierarchy

- Introduced in Salesforce Spring ‘20 release (GA in Summer ‘20), use External Account Hierarchy to share records owned by the users of child account with users of parent account (similar to role hierarchy)
- Currently only upto 7 levels of account hierarchy is supported
- User must have CRED permissions on the object(s) through profile/permission set

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Leave Your Feedback

Hope this gives you a pretty good idea about all the different options on how to share records in Salesforce

Please do not forget to leave your feedback on my blog at URL http://www.asagarwal.com/ways-to-share-records-in-salesforce

Thank You !

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Document Change Log

Version	Changes
1.0	• First Release
2.0	• Made changes on slide with header ‘8. Queues’. Since Salesforce Spring ‘20 release, ‘Tasks’ can be assigned to queues • Made changes on slide with header ‘13. Sharing Set’. Since Winter ‘19 release, Sharing Set has been made available to all community licenses. Prior to that, it was only applicable for ‘Customer Community’ license • Made changes on slide with header ‘14. Sharing Group’ • Added the slide with ‘21. Account Relationship Data Sharing Rule’. This is a new sharing option that was introduced in Salesforce Summer ‘19 release
3.0	• Added the slide with ‘22. External Account Hierarchy’. This is a new sharing option that was introduced in Salesforce Spring ‘20 release
3.1	• Added the point on ‘Grant Access Using Hierarchies’ on Slide 17 ‘6. Role Hierarchy’