Salesforce Sharing Illustrated

Rule of Thumbs:
When working with Object or Fields access, the most RESTRICTIVE wins
When working with records access, the most PERMISSIVE wins

Folder Access: ignore role Hierarchy
Explicitly named on role by role basis
Used for : REPORT / DASHBOARD / DOCUMENT / EMAIL COMMUNICATION TEMPLATE

Public Group

Territory Management - Additional layer of security - Expand access in private model
Allow grouping of records and users by organizationally defined territories

Team Sharing Rule : Flexible & individual Frequent Access + Automation with default *Account and Sales Teams* + *can Keep transfer record ownership ("Keep Opp/Acc Team" check-box)*
Opportunity Team –Team Selling – Sales Team (**Opportunity access**: RO/RW + Select Team Role)
Account Team (**Account Access** : RO/RW + **Contact Access**: Private/RO/RW + **Opportunity Access**: Private/RO/RW + **Case Access**: Private/RO/RW + Select Team Role => overrides OWD)
Case Team

Manuel Sharing Rule : One-Off Access *to individual, edge case-manner*
LOST during transfer record ownership (for Account and Opportunity)

Grant Wider Access

Sharing Rule : Horizontal Access *(to a group of people)*
1-Based on record's owner
2-Based on criteria

Grant Wider Access

Role Hierarchy: Vertical Access

Grant Wider Access

OWD per Object - Base level of access
Apply only if Private (or *Public Read Only*)
Do not apply if Public Read/Write (no needs)

Grant Wider Access

Permission Sets - Extra capabilities

Baseline Access
Restrict User Access

Profile

Object Level

Record Level

Security is about others users record access

Owner=Full Record Access

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More records are shared with more users as we go UP

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