Sharing Setting

Salesforce allows you to configure sharing settings to control how records are accessed and shared within your organization. These settings are crucial for maintaining data security and privacy. Salesforce provides a variety of tools and mechanisms to define and enforce sharing rules, such as:

Organization-Wide Default (OWD) Settings:

These settings define the default level of access for all objects within your Salesforce org.

OWD settings include Private, Public Read-Only, Public Read/Write, and Controlled by Parent.

OWD settings can be configured for each standard and custom object.

Role Hierarchy:

Salesforce uses a role hierarchy to determine record access.

Users at higher levels in the hierarchy have greater access to records owned by or shared with users lower in the hierarchy.

The role hierarchy is often used in combination with OWD settings to grant different levels of access.

Profiles and Permission Sets:

Profiles and permission sets allow administrators to specify object-level and field-level permissions for users.

Profiles are typically used to grant general object and field access, while permission sets can be used to extend those permissions to specific users.

Sharing Rules:

Sharing rules are used to extend access to records for users who meet specific criteria.

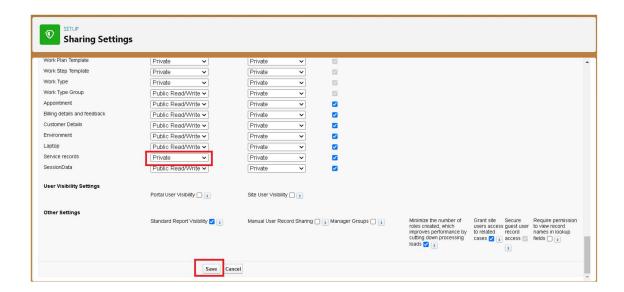
They can be used to grant read-only or read-write access to records owned by other users.

Manual Sharing:

Administrators and record owners can manually share specific records with other users or groups.

Creating Sharing settings

- Go to setup >> type users in quick find box >> select Sharing Settings >> click Edit.
- 2. Change the OWD setting of the Service records Object to private as shown in fig.



- 3. Click on save and refresh.
- 4. Scroll down a bit, Click new on Service records sharing Rules.

5.



- 6. Give the Label name as "Sharing setting"
- 7. Rule name is auto populated.
- 8. In step 3 : Select which records to be shared, members of "Roles" >> "Sales person"
- 9. In step 4: share with, select "Roles" >> " Manager"
- 10. In step 5 : Change the access level to "Read / write".
- 11. Click on save.

