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Admin Configuration Kit: Configure Record Sharing

Proceed through the configuration flow below to determine what sharing features are best for your users.

Best Practice: If multiple sharing ulres give a user different levels of access to a record, the user will receive the most permissive access level. Sharing should be configured in a sandbox and tested thoroughly before deploying to production. Changing record access in production is a major operation and should take place after hours. Consider removing Salesforce access until sharing has recalculated.

This kit is not intended to replace Help & Training.

Feedback?

