Permissions for Managing Custom Segments and Values

> **WARNING**
> This feature is not currently enabled in your account. To enable this feature, please contact your administrator.

By default, only administrators can create and configure segments and segment values. However, you can permit other roles to complete these tasks. At a high level, you can permit a role to do the following:

- **Create and configure custom segments and their values** – To grant a role permission to view, edit, and delete custom segment definitions, you use the global Custom Segments permission. For details, see Granting a Role Permission to Manage Custom Segments.
- **Create and edit values for a particular custom segment** – For each segment, you can grant a role permission to create, edit, and delete the segment's values. You grant this access by using the segment's Value Management Access permission. For details, see Granting a Role Permission to Manage Custom Segment Values.
- **Use segments after they have been created, configured, and applied to records types** – To give a role this type of access, you use two permissions, each of which are segment-specific: Record Access and Search/Reporting Access. For more information, see User Permissions for a Custom Segment.

Note that the first two types of permissions have interdependencies. For example, if a role has some level of the Custom Segments permission, the role also has permission to view segment values, even if the role has not specifically been granted Value Management Access for any segment.

Related Topics