Assigning the Value Management Access Permission

Use this procedure to grant a role permission to work with a custom segment's values.

To assign the Value Management Access permission:

1. Go to Customization > Lists, Records, & Fields > Custom Segments (Administrator).
2. Locate the segment for which you want to grant access, and click **Edit**.
3. Click the **Permissions** subtab.
4. For a role to have access, the role must be referenced in the Permissions sublist. Review the sublist to see if the role is already listed, then do one of the following:
   - If the role is not listed, add a line to the sublist: In the **Role** column, select the appropriate role. In the **Value Management Access Level** column, select the required access level. Review the values for this role in the columns labeled **Record Access Level** and **Search/Reporting Access Level**. Make any changes as needed. Then click **Add**. For details on the Record Access and Search/Reporting Access permissions, see User Permissions for a Custom Segment.
   - If the role is already listed but does not have the ability to manage values, then edit the role's access. Locate the role in the sublist. Edit the corresponding value in the **Value Management Access Level** column. Then click **OK**.

   Note: If the Role has not been granted the Custom Segments permission, **None** is the only option available on the Value Management Access Level list. You must grant the role the Custom Segments permission before you can specify the value management access level. Go to Setup > Users/Roles > User Management > Manage Roles. On the Permissions > Setup subtab, add the Custom Segments permission to the role.

5. Click **Save**.

Note: You can also set the Value Management Access Level by editing the role. On the role record, go to the Permissions > Custom Record subtab. The names of all custom segments are displayed in the Record column.

Related Topics