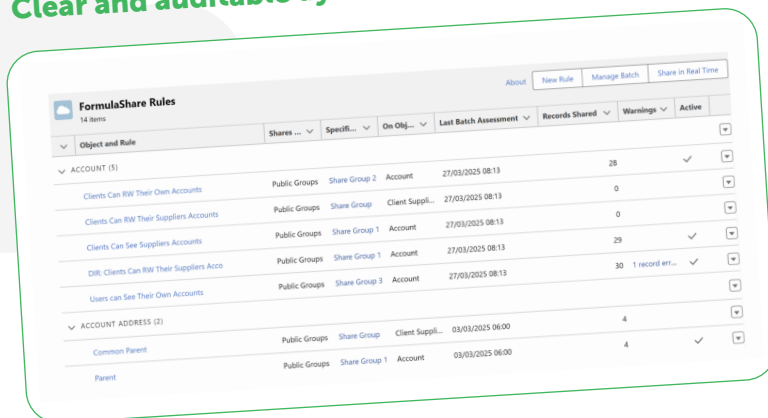


FORMULASHARE

Simplify complex sharing.

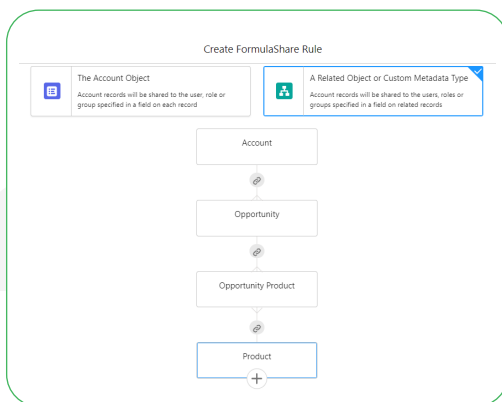
Native Salesforce app built for any cloud:
Sales, Service, Industry Clouds
and Experience Cloud.

Clear and auditable dynamic rules



Object and Rule	Shares	Specificity	On Object	Last Batch Assessment	Records Shared	Warnings	Active
ACCOUNT (5)							
Clients Can RW Their Own Accounts	Public Groups	Share Group 2	Account	27/03/2025 08:13	28		✓
Clients Can RW Their Suppliers Accounts	Public Groups	Share Group	Client Suppl...	27/03/2025 08:13	0		
Clients Can See Suppliers Accounts	Public Groups	Share Group 1	Account	27/03/2025 08:13	0		
DRI: Clients Can RW Their Suppliers Acco	Public Groups	Share Group 1	Account	27/03/2025 08:13	29		✓
Users can See Their Own Accounts	Public Groups	Share Group 3	Account	27/03/2025 08:13	30	1 record err...	✓
ACCOUNT ADDRESS (2)							
Common Parent	Public Groups	Share Group	Client Suppl...	03/03/2025 06:00	4		✓
Parent	Public Groups	Share Group 1	Account	03/03/2025 06:00	4		✓

Configure rules to share based on records connected through a series of lookups



Solve tricky visibility scenarios

Ideal for orgs where native sharing can't reflect your business logic, or where Apex sharing has become hard to maintain.

- ✓ Multi-level relationship-driven access
- ✓ Drive all record visibility from one or several controlling objects
- ✓ Sharing reflecting territory hierarchies, partner affiliations and matrix visibility
- ✓ Replacement for brittle Apex sharing code

About FormulaShare

Rules-based dynamic sharing

FormulaShare brings a new paradigm to record access in Salesforce - dynamic sharing rules which reference record relationships.

Schema-driven

Rules allow cross-object criteria traversing up, down and across lookup relationships

Dynamic

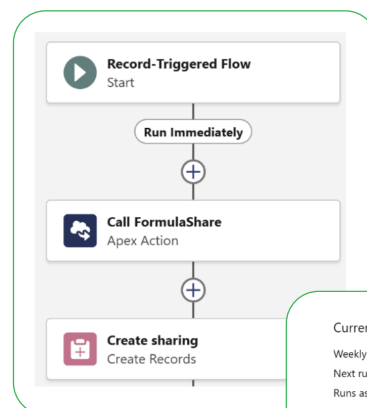
Share to users, roles, groups or queues in related records, formula fields or custom metadata

Flexible

Works with any standard or custom object which supports sharing

Scalable

Rules apply in real time when record values change, or with performant batch jobs for high volume assessment



Flows or apex for real time assessment

Currently Scheduled Job
Weekly on **Monday**
Next run: **10/03/2025, 06:00**
Runs as: **Lawrence Newcombe** (System Administrator)

[Cancel Job](#)

Reschedule Job

[Daily](#) [Specific Days](#)

* Full Recalculation Starts At

06:00

Full and targeted batches for schedule calculations

Why FormulaShare



Declarative, transparent, maintainable

No business logic in custom code or triggers. Admins can configure, audit, and troubleshoot sharing logic directly in Salesforce.



Consistent with native behaviour

FormulaShare respects all standard sharing and layers seamlessly on top of Salesforce's existing model.



Scalable and efficient

Optimised to process high-volume updates, efficiently applying sharing in real time and in bulk while minimising unnecessary or non-performant assessments.



Safer than Apex sharing

No risk of stale share records, recursion errors, buried logic or deployment headaches. Custom metadata-based sharing rules are deployable between orgs.

When FormulaShare is right for you



You need cross-object or formula-based criteria for record visibility



Native criteria-based sharing doesn't meet your needs



Apex sharing would be hard to maintain, support and audit



You want admin-friendly, rule-based automation for access control



Average of 4.9 stars on the AppExchange

What our clients have to say

Great tool!

This is an extremely useful tool if you need dynamic, conditional record sharing. It replaces complex and difficult to maintain apex sharing or numerous sharing rules. The documentation is very thorough and the developer was very helpful with my questions!

Greg Smythe

Customer since 2022

★★★★★

Cross-Object Rules and Real-Time Sharing = A+

We needed to setup of a sharing structure that grants records to users based on a related record and updates that sharing in real time. FormulaShare already supported cross-object rules, and the latest version, which was just released this week, adds a dead simple flow to enable real-time sharing. The whole thing was a cinch to set up and the developer was very responsive to questions. I definitely recommend this to other orgs with complex sharing needs.

Daniel Grenell

Customer since 2025

★★★★★

Great app and support.

This app is great for organisational structures that cannot be accurately reflected in a role hierarchy. Documentation is clear and helpful, and support is very responsive to questions and feedback.

Roger Ackerley

Customer since 2021

★★★★★

Very powerful and easy to use with clear, concise documentation

Sharing rules can become one of the more complicated areas of salesforce administration - this tool works just as expected to make them SO much easier to manage. I was able to use this to consolidate a bunch of sharing rules to be much easier to maintain, as well as get rid of some other processing that we had to do in order to trigger standard sharing rules. Now we have a less complex, more powerful method of managing record sharing. Super helpful and responsive support when you need it as well!

George Reuter

Customer since 2021

★★★★★

Makes sharing a breeze

FormulaShare has been a great tool that drastically improves efficiencies when it comes to onboarding new orgs. I wish we would have invested sooner - it would have saved a lot of time and headaches!

Jessica Homolka

Customer since 2023

★★★★★

Great tool and great support!

We used the Freemium version of FormulaShare for one of our projects. However, we found that it didn't completely meet our requirements, so we decided to upgrade to the Enterprise version. The customer support team was extremely helpful in guiding us through the upgrade process. They provided clear and friendly communication and accurate information about the product. Overall, FormulaShare turned out to be a great tool that helped us expand our sharing settings! I highly recommend it to anyone who needs similar functionalities.

Roberta Medina

Customer since 2024

★★★★★

To find out more or arrange a free trial, contact us at formulashare@cloudsundial.com

