

Dynamic Share User Documentation

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Setup

User Setup

Permission Sets

Dynamic Share Admin

Provides access to the Dynamic Share app and all share configurations in the org.

Dynamic Share User

Provides access to the Dynamic Share app and all share configurations the user has record access to.

Dynamic Share Read Only

Provides access to the Dynamic Share app and read only access to all share configurations the user has record access to.

User Interface Setup

Apps

Dynamic Share App

The dynamic share app contains the Share Configuration record page, where sharing configurations can be configured, executed, and scheduled. Access to this app is provided in all Dynamic Share permission sets.

Share Configurations

Share Configuration Setup

Configure Share Configurations

Record Type

Determines if the share configuration will be created to run when a record is created or updated to meet the requirements to share the record, or as a batch job to be scheduled on an interval.

Share Configuration Name

The name of the Share Configuration. This will be used as the name of a scheduled batch or referenced in a share trigger. The Share Configuration Name should be unique.

SObject Name

The API name of the SObject used to determine who the object is shared with (through Share Records setup) and when the object is shared (through record filters). This is not necessarily the object being shared, as related records can be shared through share configurations.

Object To Share

The record field on the SObject in the SObject Name field pointing to the record being shared. If the object in the SObject Name field is being shared, the Object To Share will be "Id". This is the default value. If a related object is being shared, this field will hold the API name of the relationship. For example, if the goal is to share assets based on if the user is assigned a case for that asset, the SObject Name field will be "Case" and the Object To Share will be "AssetId". Note: The Object To Share field's SObject, such as Asset in the example above, should have a sharing setting of Private or Read-Only. This can be set in Setup > Sharing Settings.

Access Level

Determines the record access level given to the users and groups for records shared in the batch. Values are Read (for read-only) or Edit (for read/write).

Sharing Reason

The API name of the Apex Sharing Reason set on the share records created by the batch. Leave blank for a Manual sharing reason (RowCause) on the share record.

Description

Use this field to document the share configuration.

Filter Settings

Record Filter Logic

Determines if records to share are selected based on if all filters apply to the record, any filter applies to the record, or on custom logic defined in Record Filter Custom Logic.

All Conditions Apply

Records are only shared by the batch if all filter criteria are met.

Any Conditions Apply

Records are shared by the batch if any one filter criteria is met.

Custom Logic

Records are shared based on custom logic provided by the user in Record Filter Custom Logic.

Record Filter Custom Logic

Custom logic is applied in the same style as many Salesforce out of the box features, for example “1 AND (2 OR 3)”. The Custom Logic Tag number field on filters is automatically set when the Record Filter Logic is set to Custom Logic, so the tags can be used in the Record Filter Custom Logic. Not all logic tags on filters must be used, although not using a custom logic tag from the filter will render the filter inactive. Custom logic tags used in this field must exist on a filter, otherwise the share configuration may encounter an error.

Record Filters

Determine which records are shared by the share configuration.

Field Name

The API name of the field records are being filtered on.

Operator

Compares the filter value to the value in the field from field name, and when true, selects the record to be shared by the share configuration.

Note: Contains, Starts With, and End With only support text values.

Note: Includes and Excludes only support multi-picklist fields, formatted as “Item 1;Item 2”.

Multi-picklist fields are also limited to the operators supported by Salesforce. See below.

https://developer.salesforce.com/docs/atlas.en-us.soql_sosl.meta/soql_sosl/sforce_api_calls_soql_querying_multiselect_picklists.htm

Filter Type

The type of value that can be entered into the filter value field, such as a constant, custom setting, or date function.

Constant

The value entered in Filter Value will filter records.

Custom Setting

The value entered in Filter Value will filter on the field value(s) defined in a custom setting field.

Date Function

Uses Salesforce supported date literals to automatically filter based on a relative date or data range. See below.

https://developer.salesforce.com/docs/atlas.en-us.soql_sosl.meta/soql_sosl/sforce_api_calls_soql_select_dateformats.htm

Custom Logic Tag

A number value referenced in the Filter Custom Logic field on the share configuration to place the filter into a custom logic sequence. This value is automatically set for filters when a share configuration is using custom logic. This value is preserved if the Filter Logic on the share configuration is switched away from custom logic then back to custom logic.

Share Records

Determine which users and groups the batch shares records with.

Field or Group/Role/Territory Name

The user or group type to share records with.

Type

The type of value that can be entered into the filter value field.

Constant

Accepts a constant value of a user or group Salesforce ID, the name or label of a user or group, or the API name of a group.

Custom Setting

The API name of a custom setting containing a user or group Salesforce ID, the name or label of a user or group, or the API name of a group. For example, Custom_Setting__r.Custom_Field__c.

Record Field

The API name of a record field containing a user or group Salesforce ID, the name or label of a user or group, or the API name of a group. Record fields are on the SObject Name field or related fields. For example, this can be CreatedById, User_Lookup__c, or Parent_Object__r.User_Lookup__c.

Share Trigger Configuration

Steps

1. Navigate to Salesforce Setup > Flows > New Flow
2. Create a **record triggered** flow
3. Enter the object you want this flow to run on in the initial element. This will be the object in the SObject Name field on the share configuration.
 - a. There is no need to define any entry criteria for the flow, as the criteria defined on the share configuration are applied
 - b. Select the **Actions and Related Record** option
4. Enter a Share Trigger action as the first element of the flow
 - a. In the Record Id field, enter the triggering object's record ID
 - b. In the Share Configuration Name field, copy and paste the share configuration's name from the share configuration record page
5. Save and Activate the flow

Note: It is recommended you create a separate flow for share triggers so other logic or flow errors do not prevent records from being shared.

Share Batch Execution

Immediate Execution

Execute Action

From the share configuration record page, click Execute to immediately execute the batch. The batch will share the records with the users and groups filtered to on the share configuration record. A final confirmation is displayed before execution.

Scheduled Batches

Schedule Action

From the share configuration record page, click Schedule to schedule the share configuration. If a share configuration is scheduled, click Unschedule to unschedule the share configuration. All dates and times are set in the user's selected timezone. To reschedule a share configuration or

tweak an existing scheduling, the user must unschedule then schedule the share configuration again.

One Time

Schedules a share configuration to run once at the date and time specified.

Hourly

Schedules a share configuration to run hourly a set number of minutes into each hour. This value must be between 0 and 59 inclusive.

Daily/Weekly

Schedules a share configuration to run on a specified date of the week, every week, at a specified time. To run a share configuration daily, select all days. To run a batch weekly, select one day.

Monthly Day Of Week

Schedules a share configuration to run in a specific week of the month, on a day of the week, at a specified time. For example, run a share configuration on the first Monday of every month. The week of the month supports the first through fourth weeks of the month.

Monthly Day Of Month

Schedules a share configuration to run monthly on the same day of the month at a specified time. For example, run a share configuration on the first day of every month.

Note: When a share configuration is configured to run on a day of the month that does not exist in every month, the share configuration will not run in months without that many days. For example, a share configuration configured to run on the 31st day of the month starting March 31st will not run in April.

Yearly

Schedules a share configuration to run on a specified day, in a specified month, at a specified time. For example, run a share configuration on April 15 every year.

Custom Cron

Enter a cron expression. This is to schedule a share configuration to run on an interval not yet supported by the Dynamic Share scheduling wizard. See below for a tool to create a cron expression.

<http://www.cronmaker.com>

Additional Considerations

1. It is highly recommended that the out of the box Salesforce lightning record pages included in this package are used and unchanged.
2. Share configurations must be scheduled and unscheduled with the actions on the Share Configuration record page, instead of from Scheduled Jobs in Setup.
3. If filters outside of the provided options are required, then create automation, such as a Salesforce Flow, to set a field on the record being shared by the share configuration and filter by that field using a Record Filter.
4. The picklist values on Dynamic Share object fields should remain unchanged.
5. To suggest additional features, contact support@powerblocksapps.com.