

# SMS History Visibility with Sharing Setting Rules

## Issue Scenario

Ensure SMS History visibility for specific user groups by creating new Sharing Setting Rules.

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## Solution

Assign a specific Sender Id, SMS History and Incoming SMS records to a limited number of users.

**Step 1:** Create a group of all the users who are assigned a specific sender ID and limited access to SMS History and Incoming SMS records based on your requirement.

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1. Under **Setup** search for **Public Groups** in the **Quick Find Search**.

2. Click **New** to create a new group.

3. Type a name for the group.

4. Search the users you wish to add to the group.

5. Select the **Users** and click  to move them from **Available Members** list to **Selected Members** list.

6. Click **Save**.

**Step 2:** Change the Sender ID to Private.

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1.Under **Setup** search for **Sharing Settings** in the **Quick Find** search box.

2.Under **Sharing Settings**, click **Edit**.

3.Search **SMS Sender ID** (try using Ctrl + F), SMS History and Incoming SMS.

4.Select **Private** in the picklist for all three objects.

5.Click **Save**.

### **Step 3: Create a New SMS Sender ID Sharing Rule**

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1.On the **Sharing Settings** page, scroll down to the section on **SMS SenderId Sharing Rules** .

2.Click **New**. The SMS Sender ID Sharing Rule page appears.



3.Add a **Label**

4.Under **Select your Rule Type** click the **Based on Criteria** option.

5.Under **Select which Records to be Shared**, define the following criteria:

i.Under **Field** click **senderid**

ii.Under **Operator** click **equals**

iii.Under **Value** provide the Sender ID.

6.Under **Select the users to share with**, select public group in first field and then select the group you created earlier (in **Step 1** above) in the adjacent field.

7. Under **Select the level of Access for the Users**, select **Read Only**.

8. Click **Save**.

You can also create new SMS History Sharing Rules and Incoming SMS Sharing Rules with your desired criteria depending on the record owner.

#### **Step 4: Update User Profiles**

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1. View the profiles of all the users to whom you are assigning specific sender ID's, SMS History and Incoming SMS sharing rules.

2. On their individual profile pages, click **Edit**. The profile page appears as shown.



3. Under **Custom Object permissions**, look for **SMS SenderIds**, **SMS Sender ID profile map**, **SMS History**, **Incoming SMS**.

4. Clear all selections to remove the **View all** and **Modify all** access from these profiles.

5. Click **Save**.