SMS History Visibility with Sharing Setting Rules

Issue Scenario

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

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.

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.

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

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

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**.