

Account Share Settings

ACCOUNT SHARE SCOPE	SCOPE DESCRIPTION
Summary only	Share only a high-level dashboard of account overlap. No records are shared with this option. This partner will not be able to see your individual accounts records.
All accounts	Share all of your accounts. This partner will see all of your individual accounts whether they overlap with their accounts or are new "greenfield" accounts for their company.
All customer accounts	Share all of your customer accounts. This partner will see all of your customer accounts whether they overlap with their accounts or are new "greenfield" accounts for their company.
All prospect accounts	Share all of your prospect accounts. This partner will see all of your prospect accounts whether they overlap with their accounts or are new "greenfield" accounts for their company.
Matched accounts	Share all overlapping accounts. This partner will see all of your accounts that match their accounts regardless of account type (i.e. customer or prospect).
Matched customer accounts	Share your overlapping customer accounts. This partner will only see your customer accounts that match their customer or prospect accounts.
Matched prospect accounts	Share your overlapping prospect accounts. This partner will only see your prospect accounts that match their customer or prospect accounts.
Mutual customer accounts	Share only mutual customer accounts. This partner will only see your customer accounts that are also their customers.
Mutual prospect accounts	Share only mutual prospect accounts. This partner will only see your prospect accounts that are also their prospects.
My customers that match partner prospects	Share only customer accounts that match this partner's prospect accounts.
My prospects that match partner customers	Share only prospect accounts that match this partner's customer accounts.

The following table displays the types of accounts that are used by each account sharing scope.

Please note that some options may not be available to your org and/role.

**Green columns are data shared by your partner*

Account Type →	My customer accounts	My prospect accounts	Partner customer accounts*	Partner prospect accounts*	"Greenfield" accounts for partner
Account sharing scope ↓					
Summary only	-	-	-	-	-
All accounts	✓	✓	✓	✓	✓
All customer accounts	✓	-	✓	✓	✓
All prospect accounts	-	✓	✓	✓	✓
All matched accounts	✓	✓	✓	✓	-
Matched customer accounts	✓	-	✓	✓	-
Matched prospect accounts		✓	✓	✓	-
Mutual customer accounts	✓	-	✓	-	-
Mutual prospect accounts	-	✓		✓	-

My customers that match partner prospects	✓		-	✓	-
My prospects that match partner customers	-	✓	✓	-	-