Salesforce Visibility and Sharing [1]

June 14, 2021 by jennifer.mortensen [2]

NOTE Users can only share campaigns for which they are listed as the owner. If you are a user in need of sharing other campaigns, reports, or dashboards, contact your eComm specialist [3] for assistance.

Since eComm has hundreds of users across all four campuses, system, and Advancement, staying organized and protecting users' assets can be challenging. Luckily, Salesforce has built-in visibility and sharing rules that control who can access certain content and how certain content can be shared.

Visibility

Visibility of Salesforce Reports or Dashboards is controlled at the parent folder level. Salesforce Campaign permissions are assigned at the individual campaign level. If you or your user cannot access a Report, Dashboard, or Campaign, check permissions at the campaign or report/dashboard folder level.

Sharing Content with Other Users

REMINDER Much of eComm's sharing in Salesforce is accomplished through Public Groups. Learn more about Public Groups and how they are managed in our Public Groups wiki [4].

Sharing a Report Folder

1. Navigate to the **Reports** tab
2. Select **All Folders** listed on the left-hand side
    1. Find your Report Folder by scrolling or "Search all folders" in the top
3. Click the **carrot** on the far right of the row with your Report Folder name
4. Select **Share** from the dropdown
5. In the new popup window, **Share** with **Public Groups** or **Users**, **View Access**
6. Click **Share,** and then **Done**
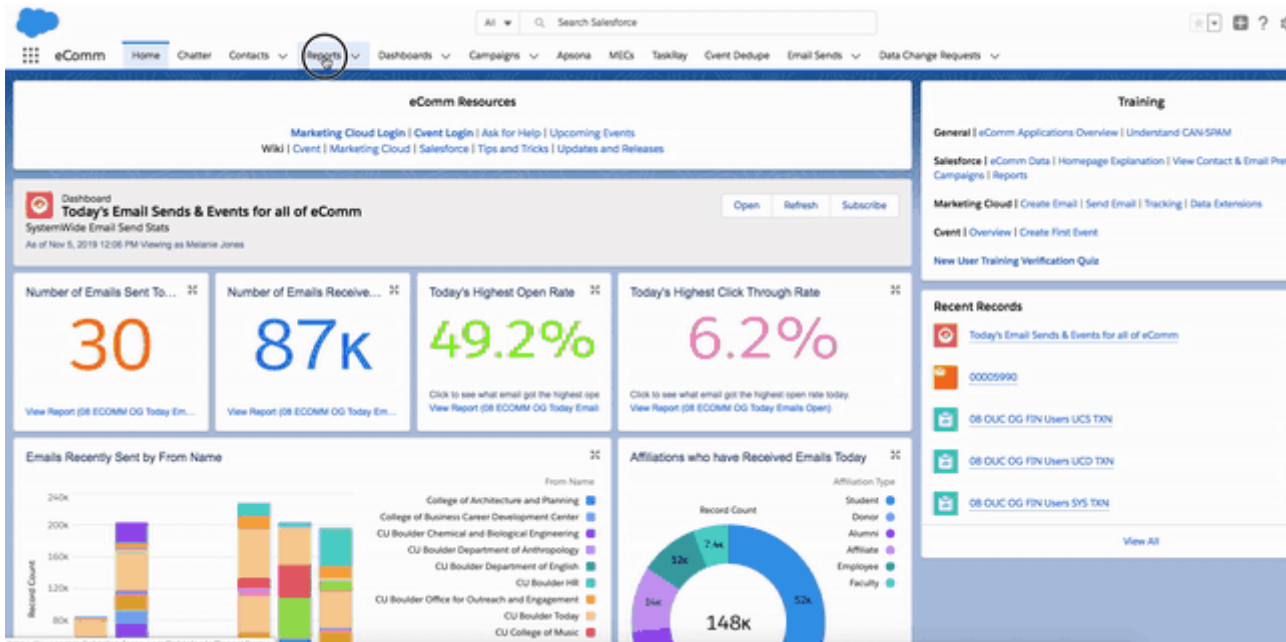
Sharing a Dashboard

1. Navigate to the **Dashboards** tab
2. Select **All Folders** listed on the left-hand side
    1. Find your Dashboard Folder by scrolling or "Search all folders" in the top
3. Click the **carrot** on the far right of the row with your Dashboard Folder name
4. Select **Share** from the dropdown
5. In the new popup window, **Share** with **Public Groups** or **Users**, **View Access**
6. Click **Share**, and then **Done**
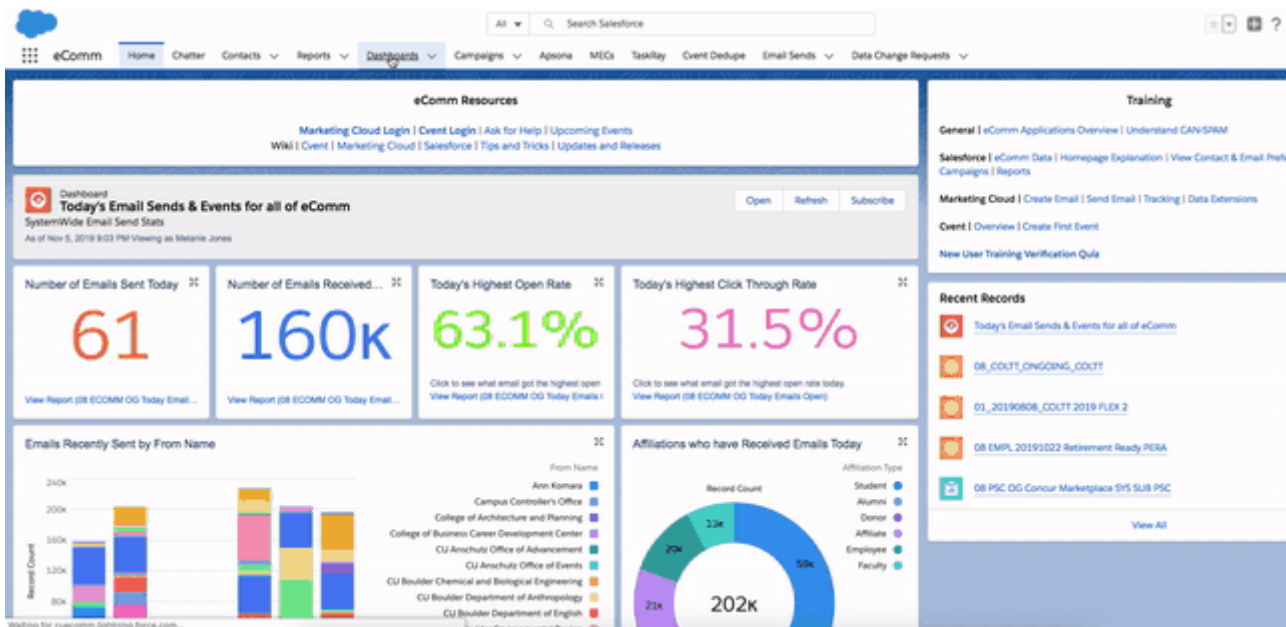
Sharing a Campaign

There are two ways to share a Campaign:

- Share Campaign (new)
- Share Campaign (old)

- Once a Campaign exists, click the **Sharing** button in the top right

- In the pop-up, it defaults to Users. Click the **down arrow** with the image of a person to select **Public Groups** in the dropdown.
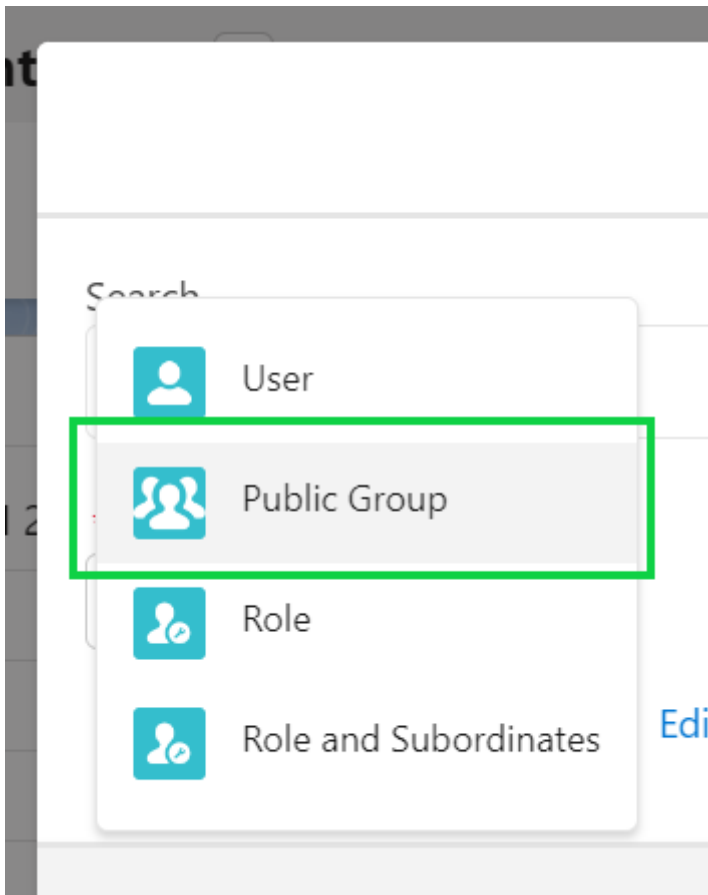
Share

Search

 Search User...

*Campaign Access

Read Only ▼

Shared with 2 groups of users.   Edit

- **Search** for the name of the Public Group. **Select** the Public Group name once it appears.

Share

Search

 arts

 01 College of **Arts** and Sciences

 01 Miramontes **Arts** & Sciences Program

 03 College of **Arts** & Media

 03 College of Liberal **Arts** and Sciences

 04 College of Letters **Arts** & Sci

- Confirm the Public Group (or Users) selected are correct. Click the blue **Save** button.

- Click the **down arrow** next to Clone. Select **Sharing** in the dropdown.

- Chose the **Add New Permission** tab
- Search the **Public Group** or Individual name
- Grant **Read** access

Campaign : 08_UIS_20210615_MJJ Test

View/Edit Current Permissions   **Add New Permission**

Search

Public Groups ▲▼

For

NAME

03 University Events (Regular)

04 Events (Regular)

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eComm Resources

Marketing Cloud Login | Cvent Login | Ask for Help | Upcoming Events
Wiki | Cvent | Marketing Cloud | Salesforce | Tips and Tricks | Updates and Releases

Training

General | eComm Applications Overview | Understand CAN-SPAM

Salesforce | eComm Data | Homepage Explanation | View Contact & Email Preferences | Campaigns | Reports

Dashboard
Today's Email Sends & Events for all of eComm
SystemWide Email Send Stats
As of Nov 6, 2019 12:08 PM Viewing as Melanie Jones

Open   Refresh   Subscribe

Marketing Cloud | Create Email | Send Email | Tracking | Data Extensions

Cvent | Overview | Create First Event

New User Training Verification Quiz

Number of Emails ...	Number of Emails ...	Today's Highest Op...	Today's Highest Click Through Rate
23	**122k**	**44.2%**	**4.8%**
View Report (08 ECOMM OG ...	View Report (08 ECOMM OG ...	Click to see what email got the hi View Report (08 ECOMM OG To:	Click to see what email got the highest open rate tod: View Report (08 ECOMM OG Today Emails Open)

Recent Records

Today's Email Sends & Events for all of eComm

08_20191031_CU System Staff Halloween Party

LN-0261

Daniella Torres Solano

Emails Recently Sent by From Name

From Name

240k   Carrie John, CU Denver Student Suc...

Affiliations who have Received Em...

Affiliation Type

Alumni

Display Title:

Salesforce Visibility and Sharing
Send email when Published:
Yes

Source URL:https://www.cu.edu/blog/ecomm-wiki/salesforce-visibility-and-sharing

Links
[1] https://www.cu.edu/blog/ecomm-wiki/salesforce-visibility-and-sharing [2] https://www.cu.edu/blog/ecomm-wiki/author/13789 [3] https://www.cu.edu/ecomm/strategy/leadership [4] https://www.cu.edu/blog/ecomm-wiki/salesforce-public-groups