

## **Salesforce Visibility and Sharing** <sup>[1]</sup>



June 14, 2021 by [jennifer.mortensen](#) <sup>[2]</sup>

**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](#) <sup>[3]</sup> 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**

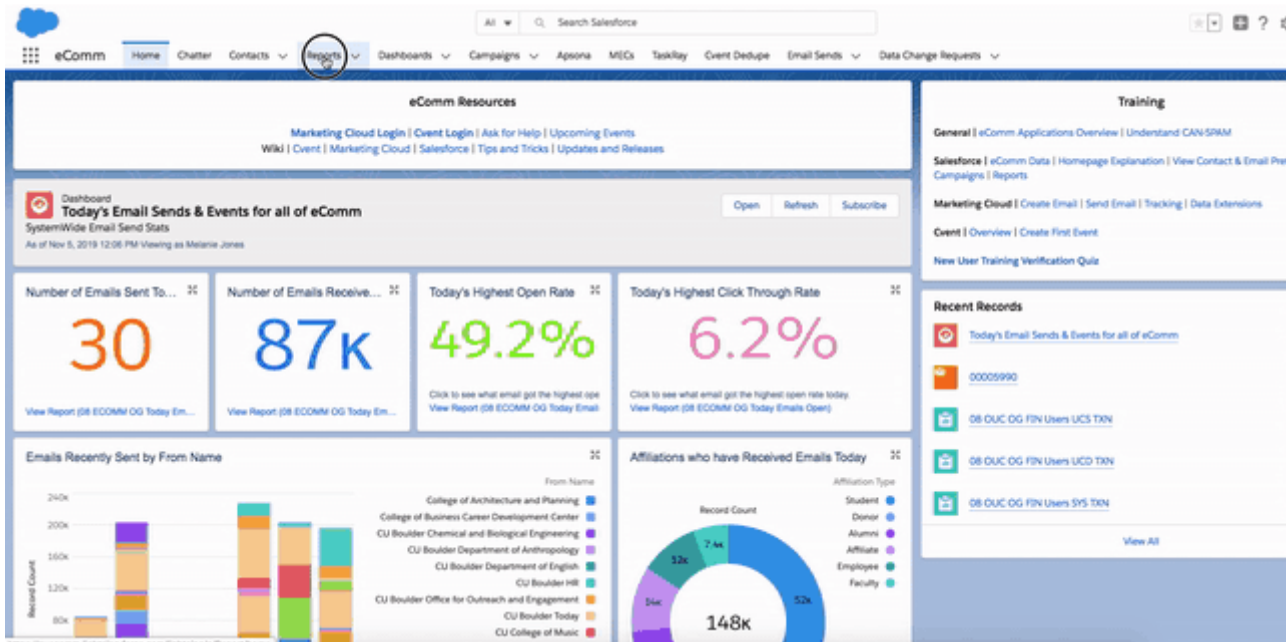
Visibility of Salesforce Reports or Dashboards is controlled at the parent folder level. Salesforce Campaign permissions are assigned at the individual campaign level. If you or your user cannot access a Report, Dashboard, or Campaign, check permissions at the campaign or report/dashboard folder level.

### **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](#) <sup>[4]</sup>.

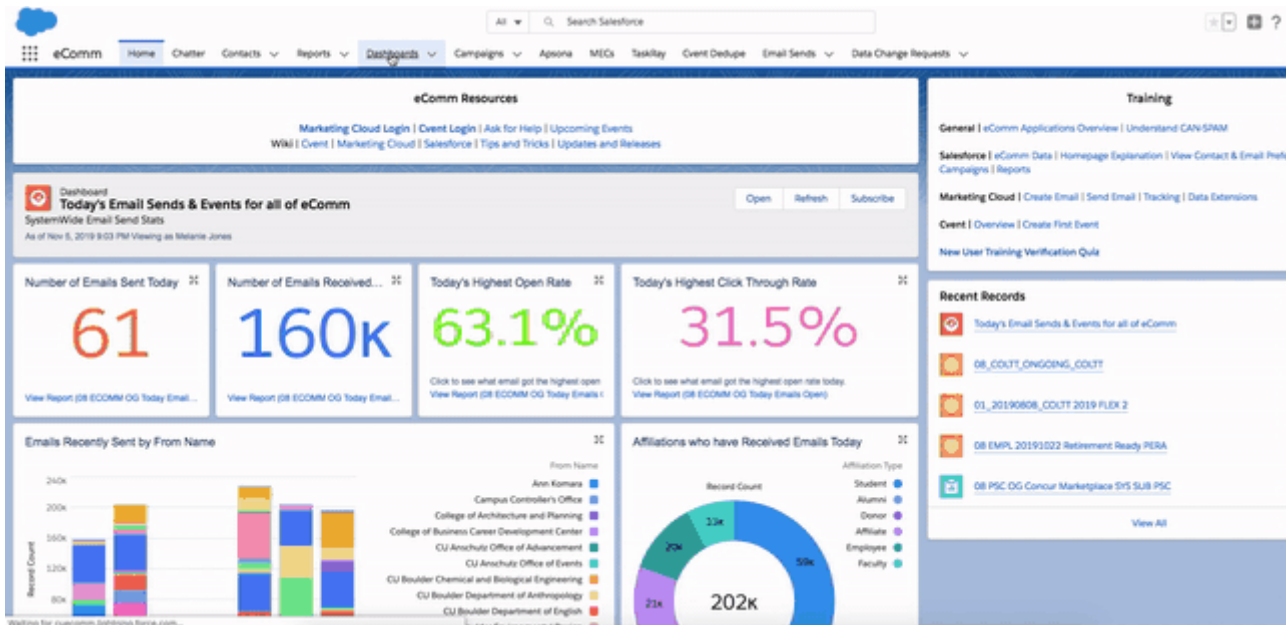
### **Sharing a Report Folder**

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

 Campaign  
**08 ECOMM 20220531 Current Users** 


Type	Status	Start Date	End Date
Email	Planned		

**Details**


Related

Campaign Name

08 ECOMM 20220531 Current Users



Parent Campaign



- 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

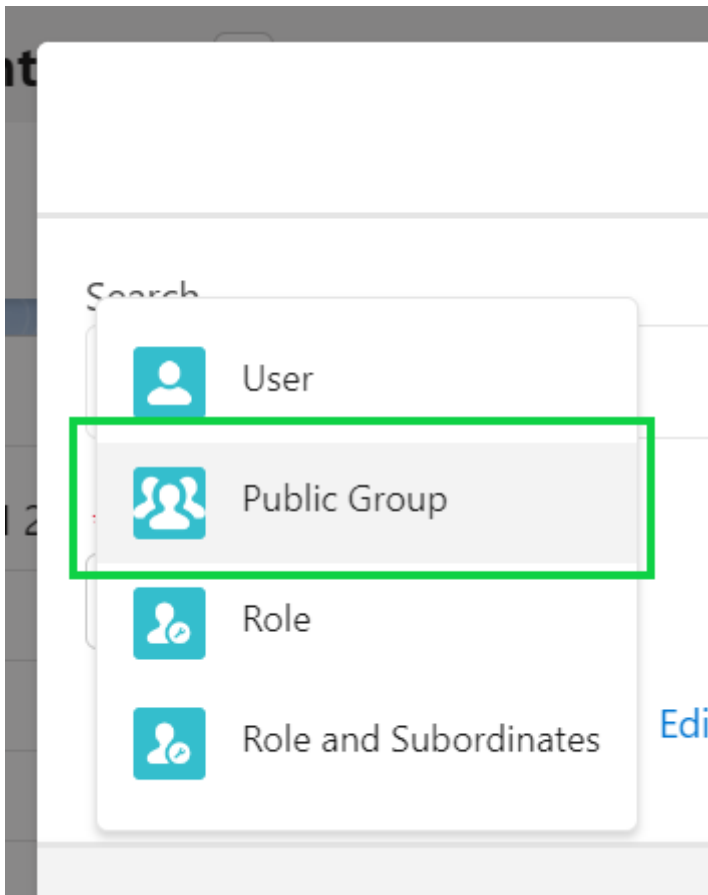


Search User...

\* 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.

## Share

Search



Search Public Group...



01 College of Arts and Sciences



\* Campaign Access

Read Only



Shared with 2 groups of users. [Edit](#)

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



Campaign

## 08 ECOMM 20220531 Current Users



Type

Status

Start Date

End Date

Email

Planned

### Details

### Related

Campaign Name

08 ECOMM 20220531 Current Users



Parent Campaign



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





Search...



eComm

Home

Chatter

Reports



Campaigns



## Campaign : 08\_UIS\_20210615\_MJJ Test

View/Edit Current Permissions

Add New Permission

Search

Public Groups



NAME

03 University Events (Regular)

04 Events (Regular)



All Search Salesforce



eComm

Home

Chatter

Contacts

Reports

Dashboards

Campaigns

Apex

MECs

TaskRay

Event Dedupe

Email Sends

Data Change Requests

### eComm Resources

[Marketing Cloud Login](#) | [Event Login](#) | [Ask for Help](#) | [Upcoming Events](#)  
[Wiki](#) | [Event](#) | [Marketing Cloud](#) | [Salesforce](#) | [Tips and Tricks](#) | [Updates and Releases](#)



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

Number of Emails ...

23

[View Report \(08 ECOMM OG ...](#)

Number of Emails ...

122k

[View Report \(08 ECOMM OG ...](#)

Today's Highest Op...

44.2%

[Click to see what email got the hi](#)  
[View Report \(08 ECOMM OG To](#)

Today's Highest Click Through Rate

4.8%

[Click to see what email got the highest open rate tod](#)  
[View Report \(08 ECOMM OG Today Emails Open\)](#)

Emails Recently Sent by From Name

240k

From Name

Carrie John, CU Denver Student Suc...

Affiliations who have Received Em...

Affiliation Type

Alumni

### Training

[General](#) | [eComm Applications Overview](#) | [Understand CAN-SPAM](#)

[Salesforce](#) | [eComm Data](#) | [Homepage Explanation](#) | [View Contact & Email Preferences](#) | [Campaigns](#) | [Reports](#)

[Marketing Cloud](#) | [Create Email](#) | [Send Email](#) | [Tracking](#) | [Data Extensions](#)

[Event](#) | [Overview](#) | [Create First Event](#)

[New User Training Verification Quiz](#)

### Recent Records

[Today's Email Sends & Events for all of eComm](#)

[08\\_20191031\\_CU System Staff Halloween Party](#)

[LN-0261](#)

[Daniella Torres Solano](#)

Display Title:

Salesforce Visibility and Sharing

**Send email when Published:**

Yes

---

**Source URL:**<https://www.cu.edu/blog/ecommerce-wiki/salesforce-visibility-and-sharing>

**Links**

[1] <https://www.cu.edu/blog/ecommerce-wiki/salesforce-visibility-and-sharing> [2]

<https://www.cu.edu/blog/ecommerce-wiki/author/13789> [3] <https://www.cu.edu/ecommerce/strategy/leadership>

[4] <https://www.cu.edu/blog/ecommerce-wiki/salesforce-public-groups>