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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

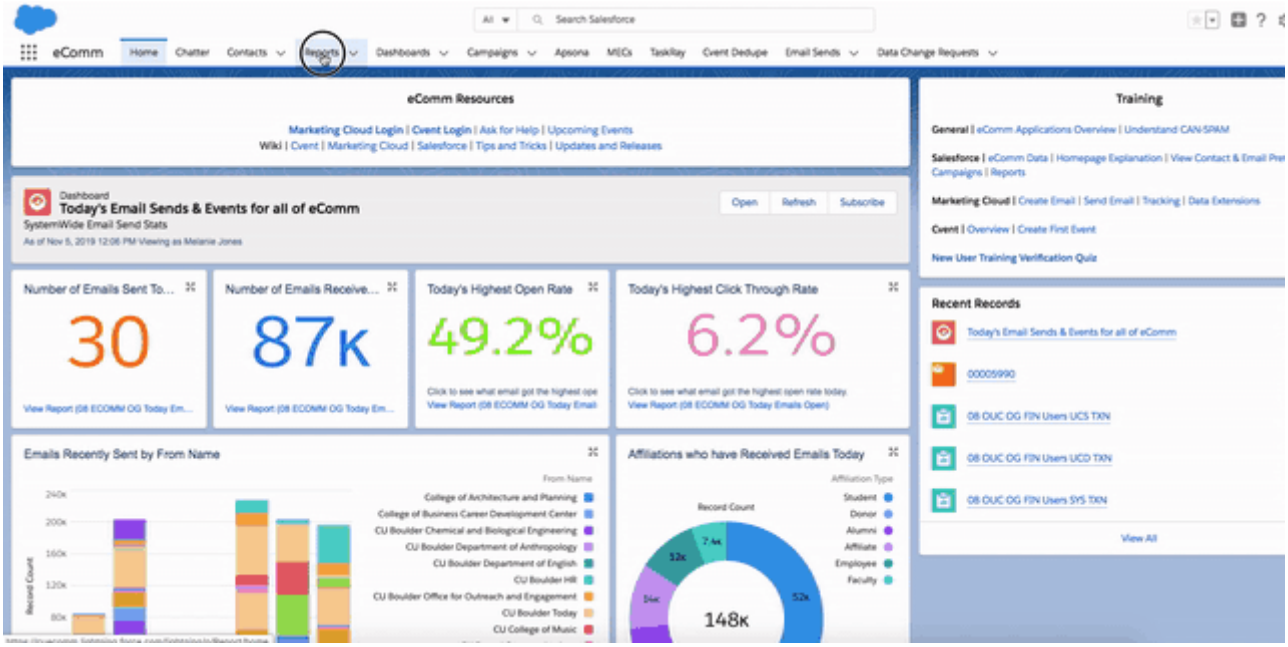
Visibility of Salesforce Reports or Dashboards is controlled at the parent folder level. Salesforce Campaign permissions are assigned at the individual campaign level. If you or your user cannot access a Report, Dashboard, or Campaign, check permissions at the campaign or report/dashboard folder level.

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].

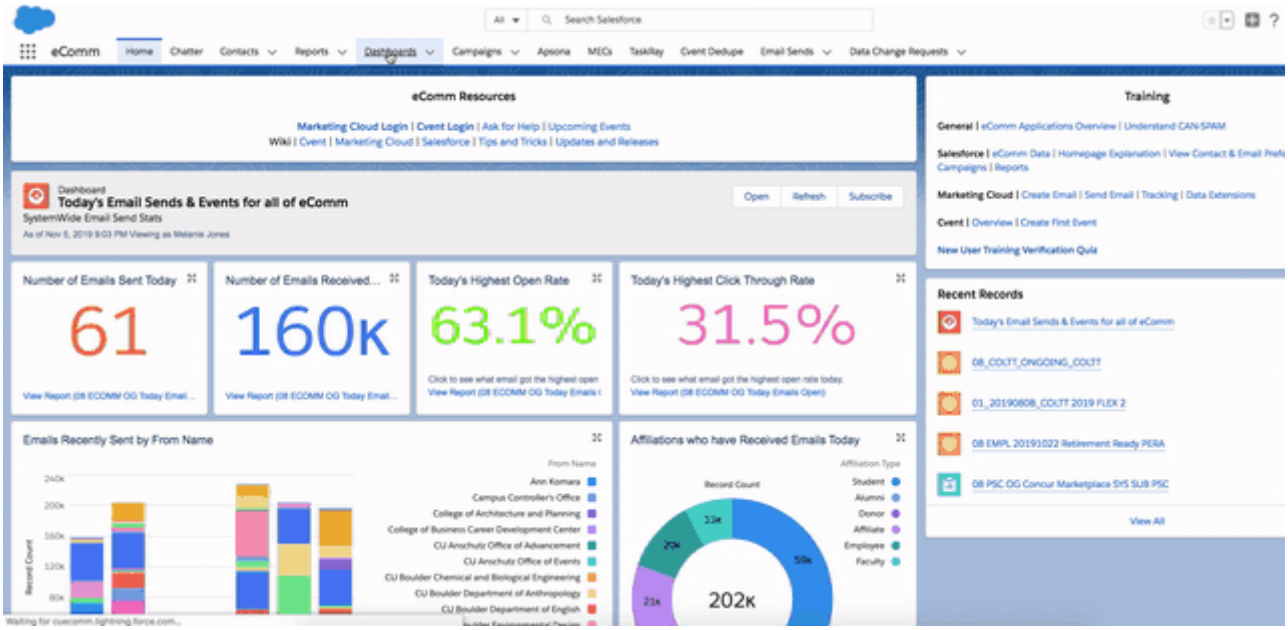
Sharing a Report Folder

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**

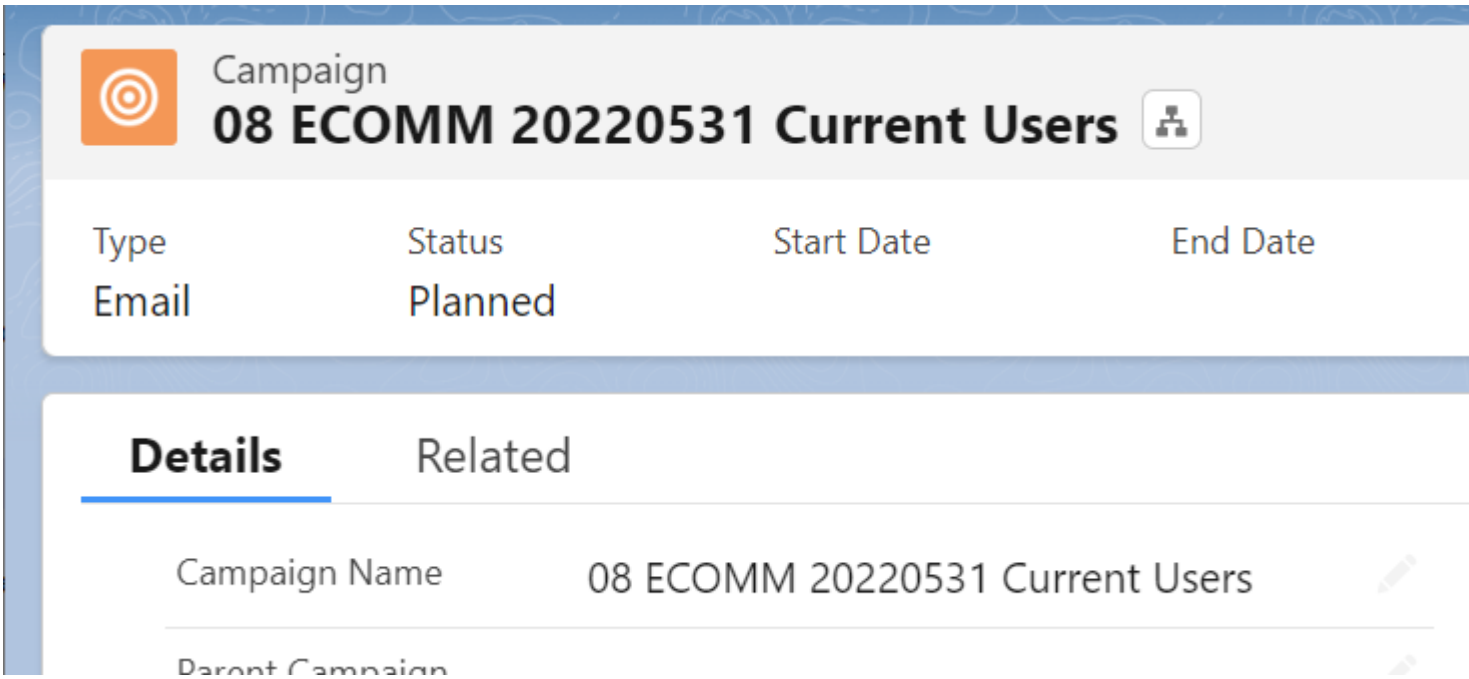


Sharing a Campaign

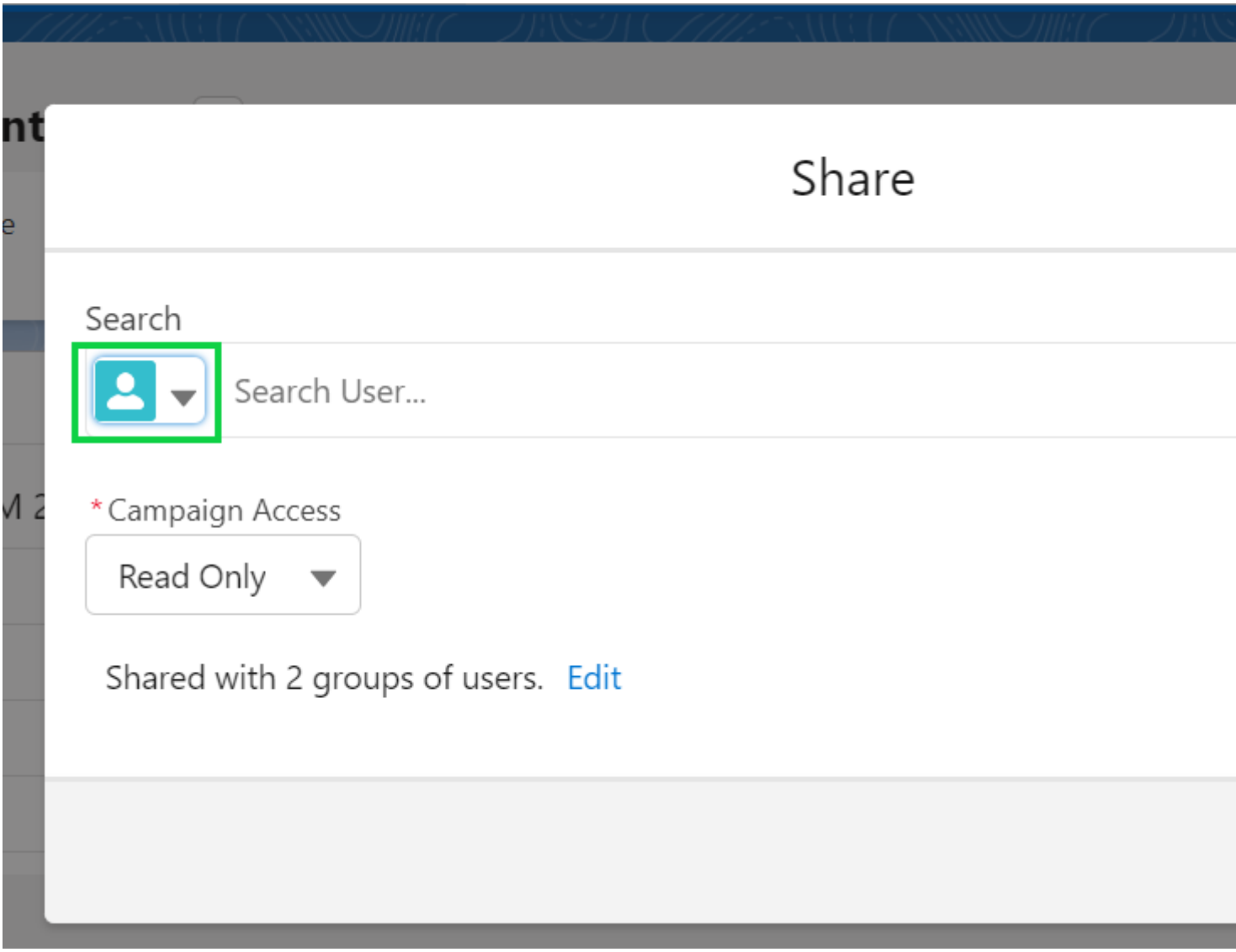
There are two ways to share a Campaign:

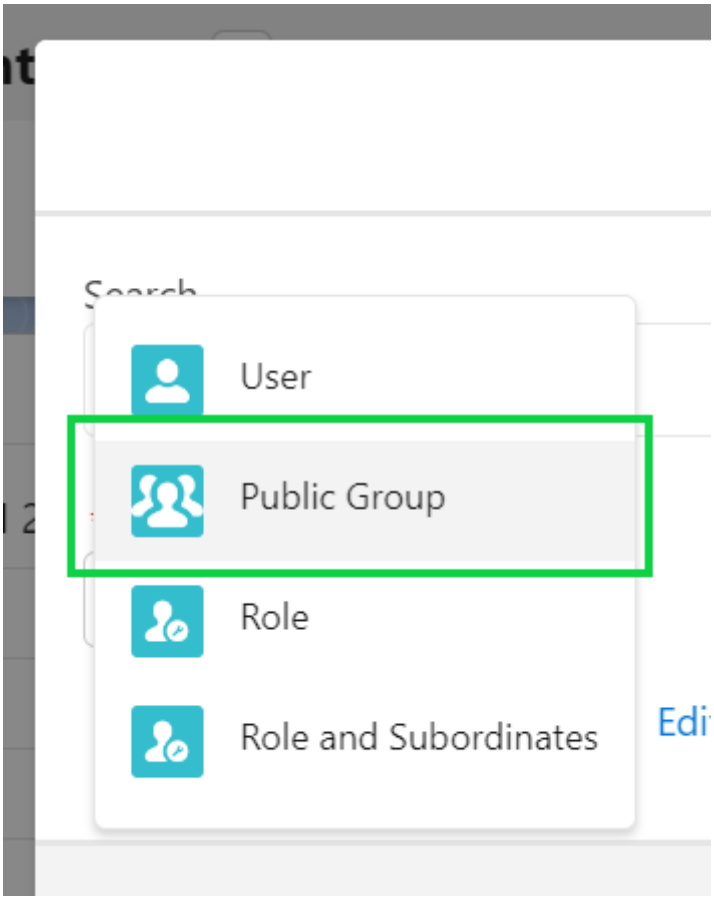
- Share Campaign (new)
- Share Campaign (old)

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

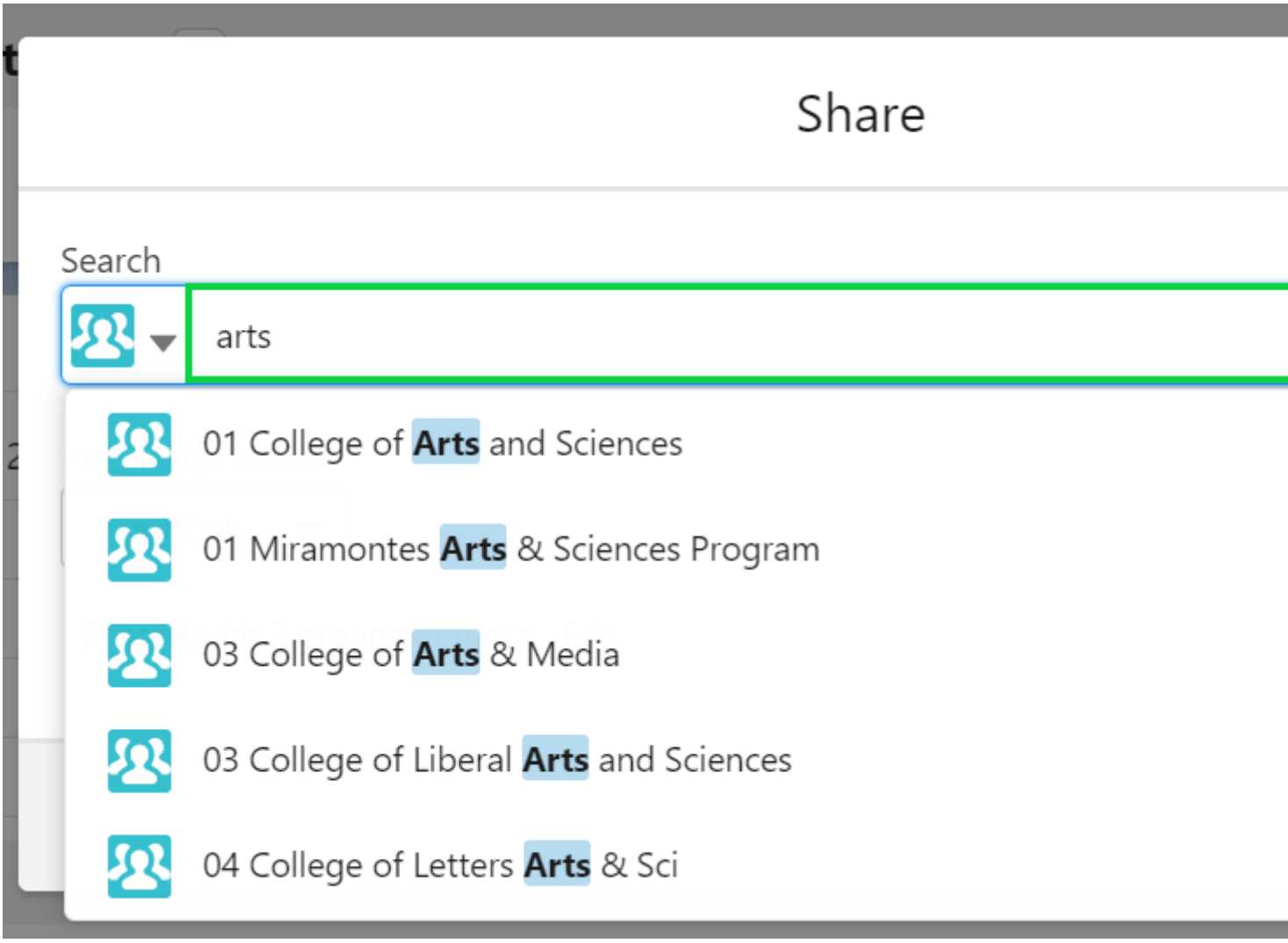


- In the pop-up, it defaults to Users. Click the **down arrow** with the image of a person to select **Public Groups** in the dropdown.

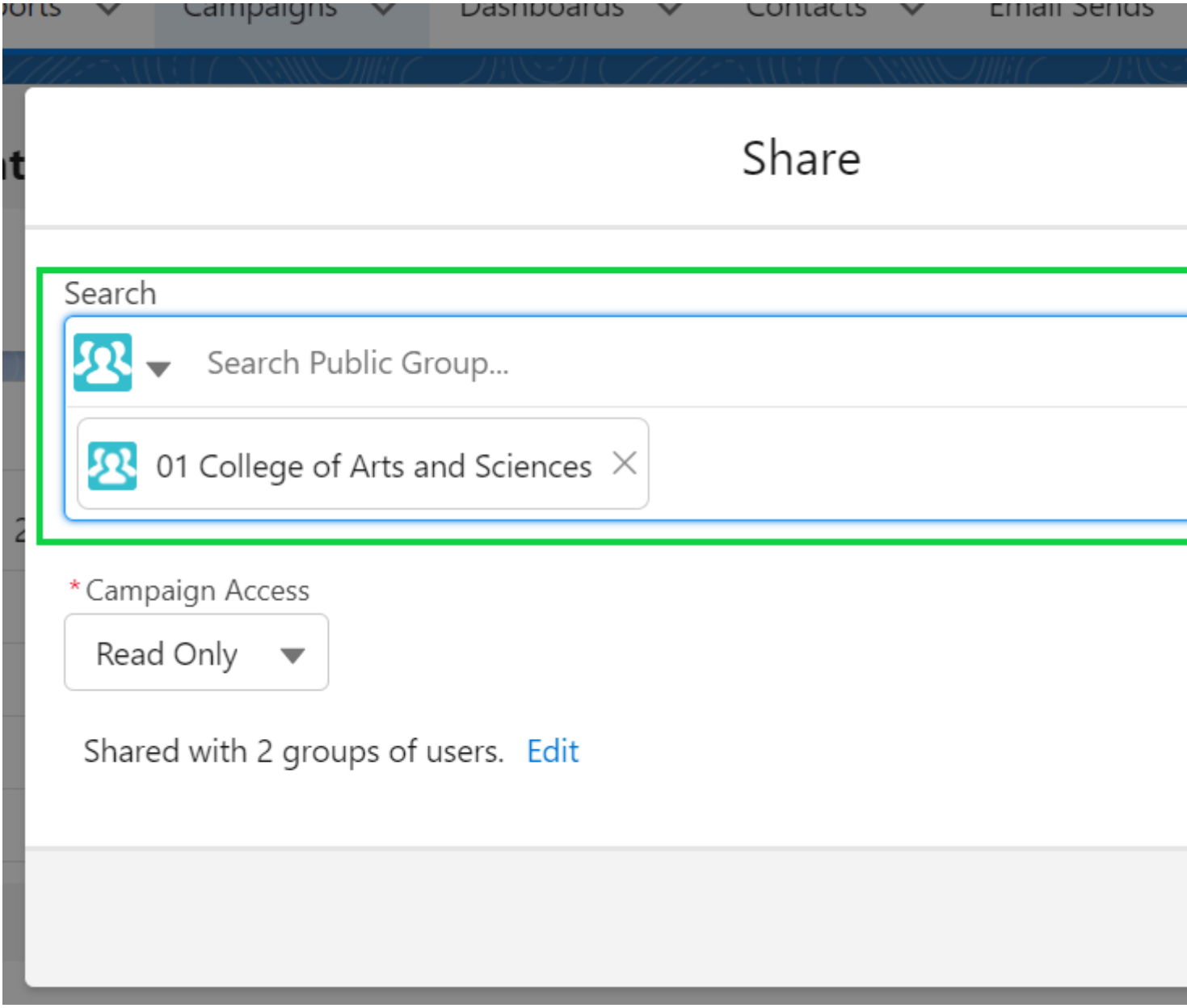

Share
Search
Search User...
* Campaign Access
Read Only
Shared with 2 groups of users. Edit



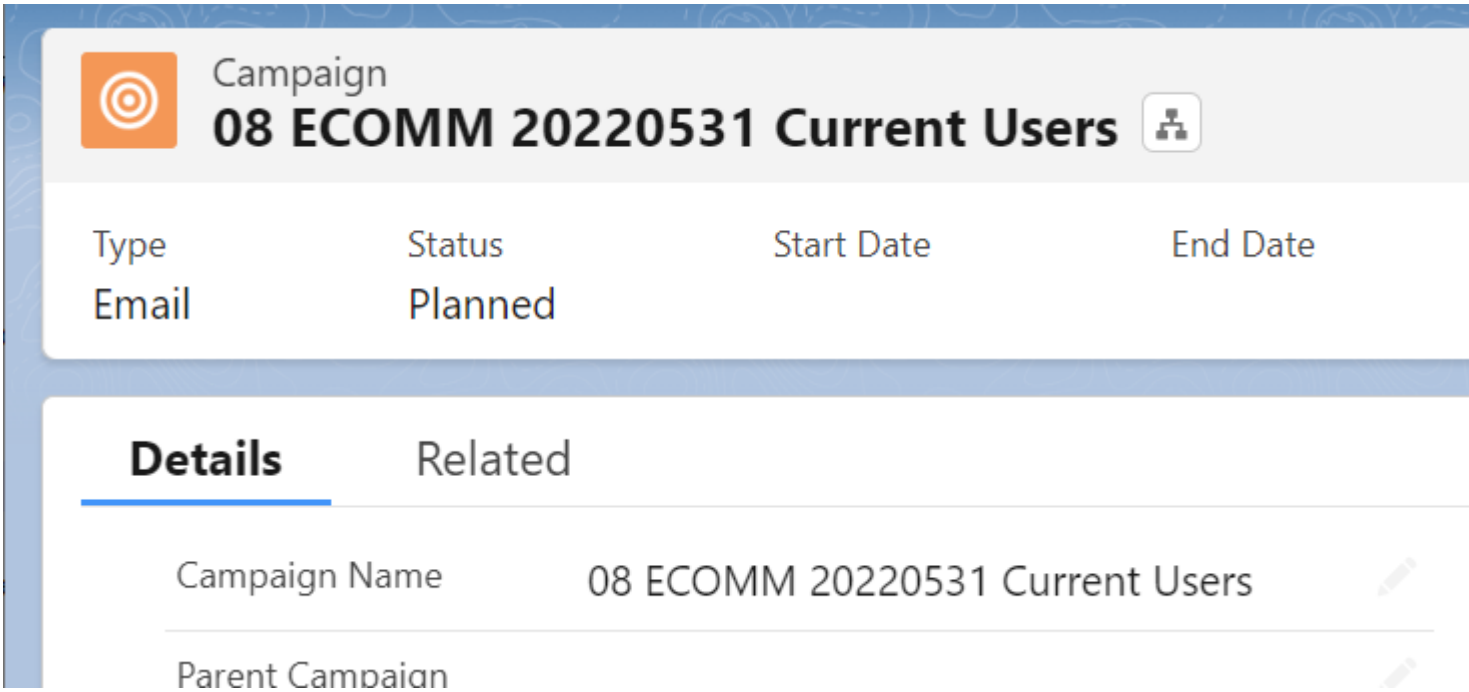
- **Search** for the name of the Public Group. **Select** the Public Group name once it appears.



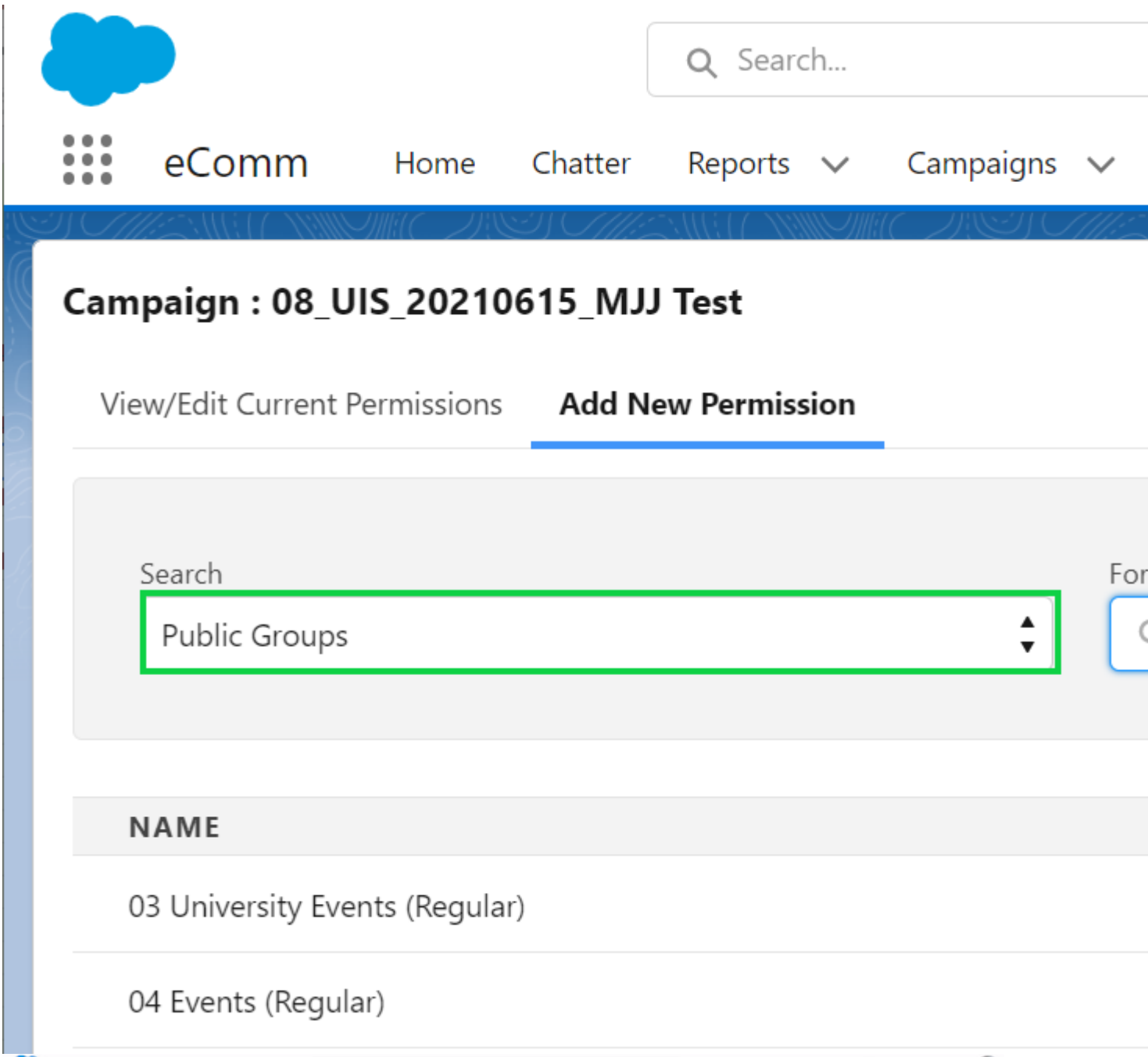
- Confirm the Public Group (or Users) selected are correct. Click the blue **Save** button.

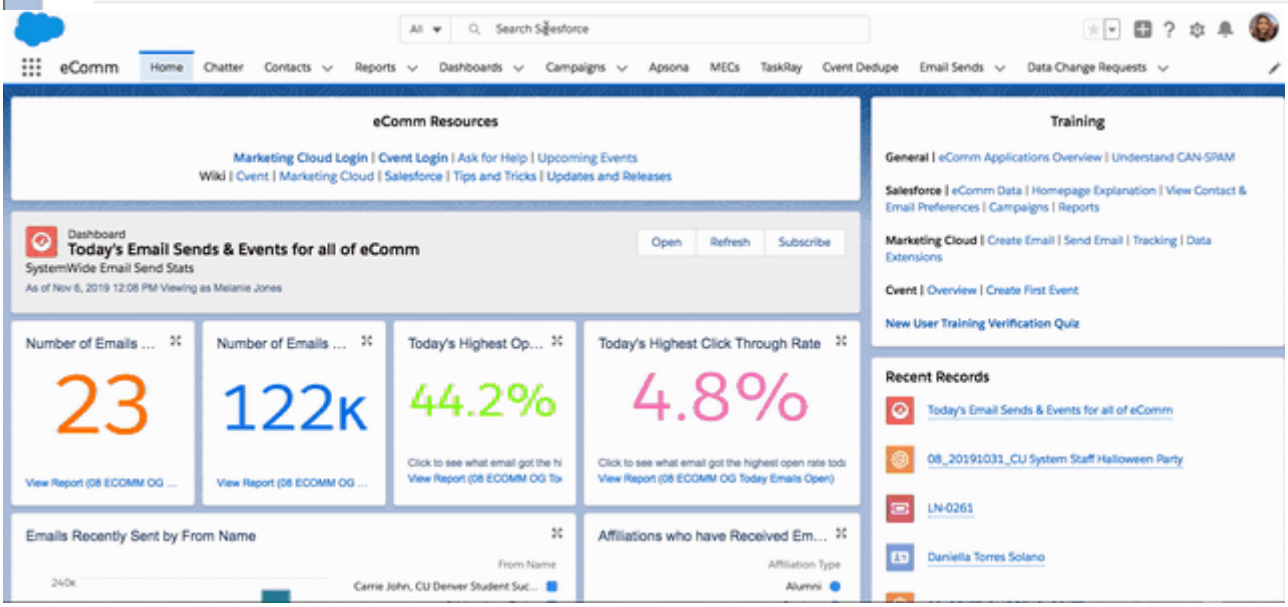


- Click the **down arrow** next to Clone. Select **Sharing** in the dropdown.



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





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