

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

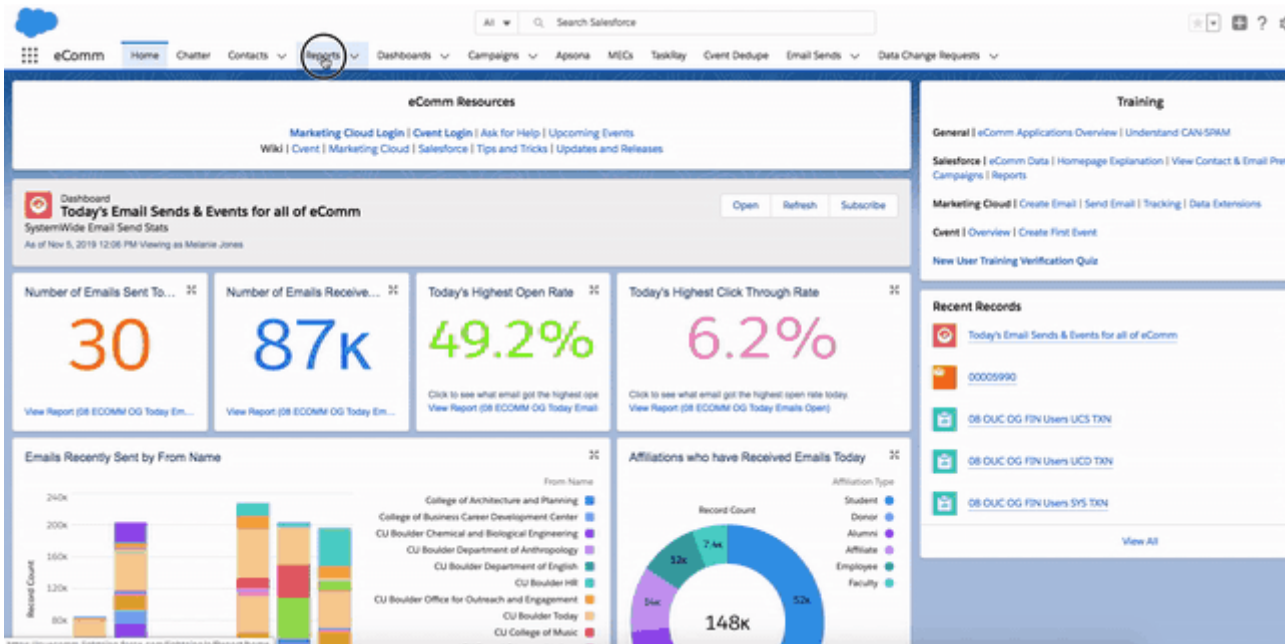
Visibility of Salesforce Reports or Dashboards is controlled at the parent folder level. Salesforce Campaign permissions are assigned at the individual campaign level. If you or your user cannot access a Report, Dashboard, or Campaign, check permissions at the campaign or report/dashboard folder level.

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].

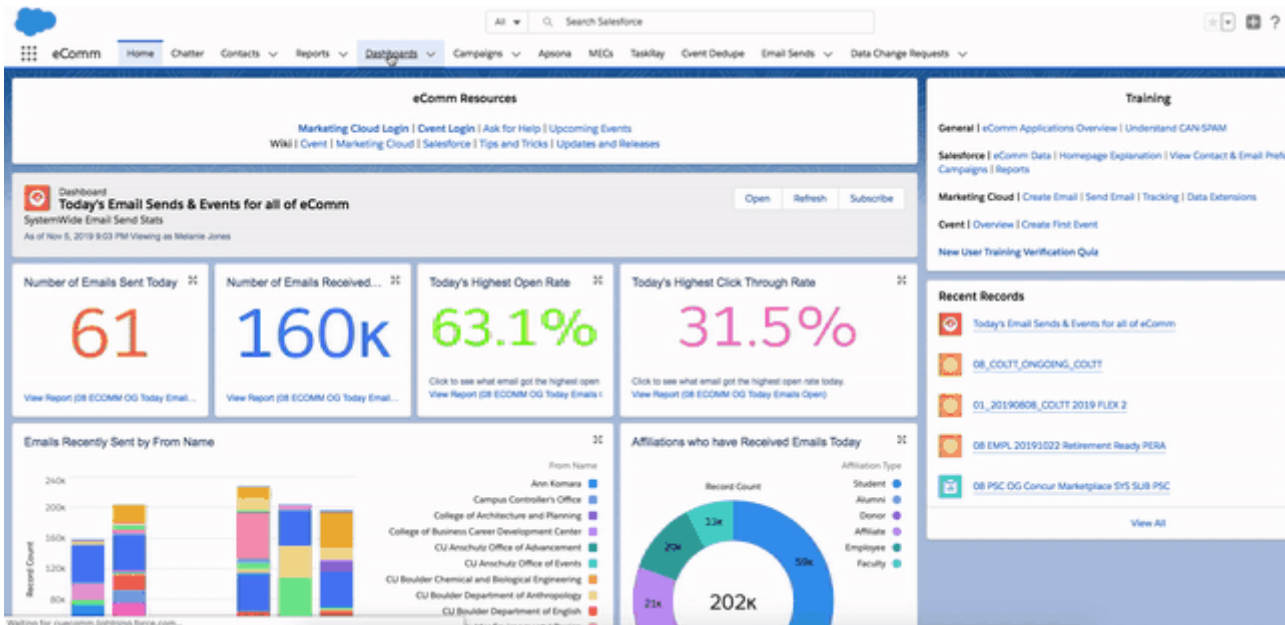
Sharing a Report Folder

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

The screenshot shows a campaign management interface. At the top, there is a header bar with a target icon, the word "Campaign", and the title "08 ECOMM 20220531 Current Users" followed by a sharing icon. Below the header is a table with columns: Type, Status, Start Date, and End Date. The first row shows "Email" under Type and "Planned" under Status. Below the table are two tabs: "Details" (which is selected and underlined) and "Related". Under the "Details" tab, there are two rows of information: "Campaign Name" with the value "08 ECOMM 20220531 Current Users" and a pencil icon to its right; and "Parent Campaign" with a pencil icon to its 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

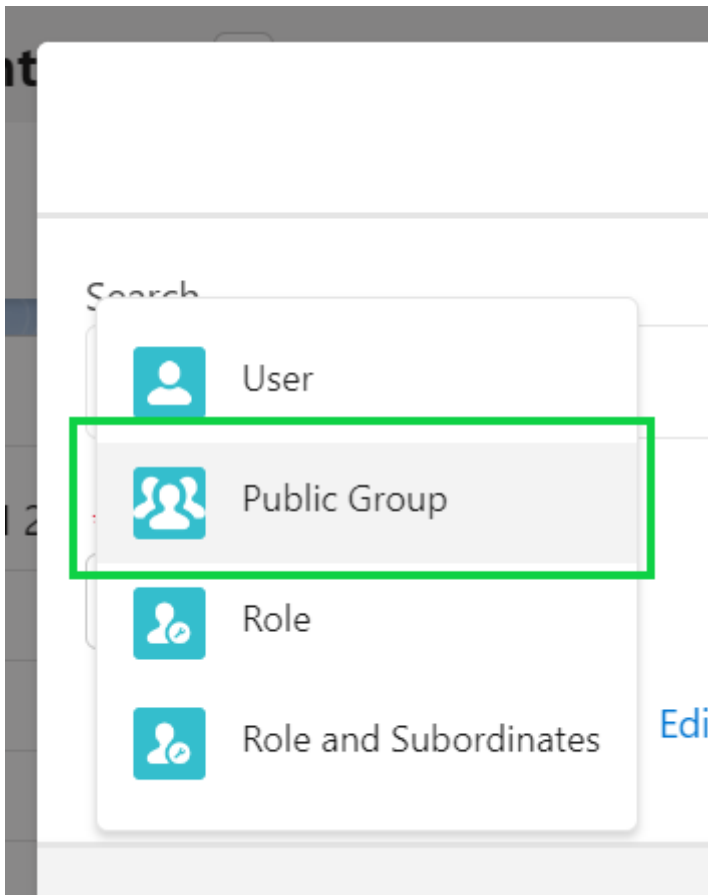


Search User...

* 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.

Reports ▾ Campaigns ▾ Dashboards ▾ Contacts ▾ Email Sends

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)

The screenshot shows the Salesforce eComm dashboard. At the top, there's a navigation bar with 'eComm', 'Home', 'Chatter', 'Contacts', 'Reports', 'Dashboards', 'Campaigns', 'Apsona', 'MECs', 'TaskRay', 'Event Dedupe', 'Email Sends', and 'Data Change Requests'. Below this is a 'Today's Email Sends & Events for all of eComm' dashboard with four key metrics: 23 emails sent, 122k total emails, 44.2% highest open rate, and 4.8% highest click-through rate. To the right, there's a 'Training' section with links for 'General', 'Salesforce', 'Marketing Cloud', and 'Event'. Below the dashboard is a 'Recent Records' section listing 'Today's Email Sends & Events for all of eComm', '08_20191031_CU System Staff Halloween Party', 'LN-0261', and 'Daniella Torres Solano'.

Display Title:

Salesforce Visibility and Sharing

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Yes

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