Display Segments Selectively

The Custom Segments feature includes a variety of permissions options. One option is that you can choose to make a segment visible to users only in certain roles. For example, you can create a segment called Rating that is applied to the Employee record type. This segment may contain sensitive information that should be available only to supervisors. In this case, you can configure the segment to be available to users in a Supervisor role but hidden for all other users. Additionally, you can choose to make the segment read-only for certain roles.

You also have many options for deciding how users can manage custom segments. For example, your account will probably have many roles that do not have permission to create or edit segments. However, if appropriate, you can give these roles permission to create and edit values for one particular segment. Note also that values can be created and updated by using the CSV Import Assistant. For details, see Custom Segment Value Import.

For details on managing permissions for segments, see Permissions for Managing Custom Segments and Values.

Also, see Benefits of Custom Segments.

Related Topics