

Shareable content

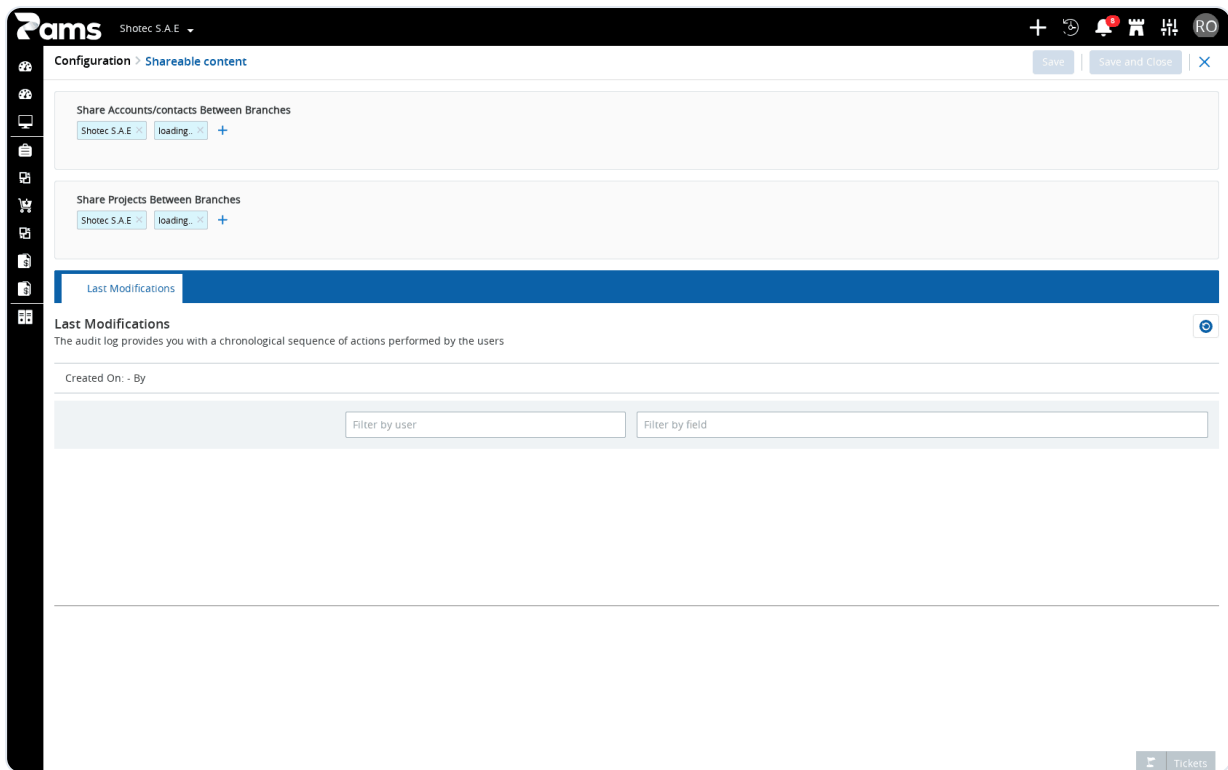
September 10, 2026

Shareable content

Shareable content overview

Shareable content is the configuration page for choosing how selected company content is shared between branches and for reviewing its modification history. The page is a reference screen with the **Last Modifications** area below the sharing settings.

If you need to...	Go to
See the sharing fields and page actions	Understand the screen
Check whether branch selection is available	Handle branch-sharing choices
Save a sharing choice	Save sharing settings
Review changes	Review modifications and continue
Maintain the company branches that supply the choices	Company branches



Before you start

The page loads company sharing data when the sharing configuration is included in your subscription.

The main content also requires company data with shared objects. Editing requires permission for the configuration route and changed data enables the save actions. When these conditions are in place, open the page in Open Shareable content.

Prerequisites

Check	What must be true
Subscription	The sharing configuration is included in your subscription.
Company data	The company has shared objects for the page to list.
Permission	You have permission to edit <code>configuration/shareable-content</code> when you need to save.
Changes	Data has changed before Save or Save and Close becomes available.
Company identity	The company identity is available before Last Modifications is available.

The page has no required fields or validation groups. If the subscription does not include the configuration, the page uses its subscription-upgrade surface instead of the sharing content.

Open Shareable content

Open the Shareable content configuration page to review or maintain the branch-sharing settings.

Prerequisites

- You know the page route.

Steps

1. Open `/configuration/shareable-content`.

Result: The page remains at `/configuration/shareable-content` and displays the sharing settings.

Use Understand the screen to identify each area before changing a choice.

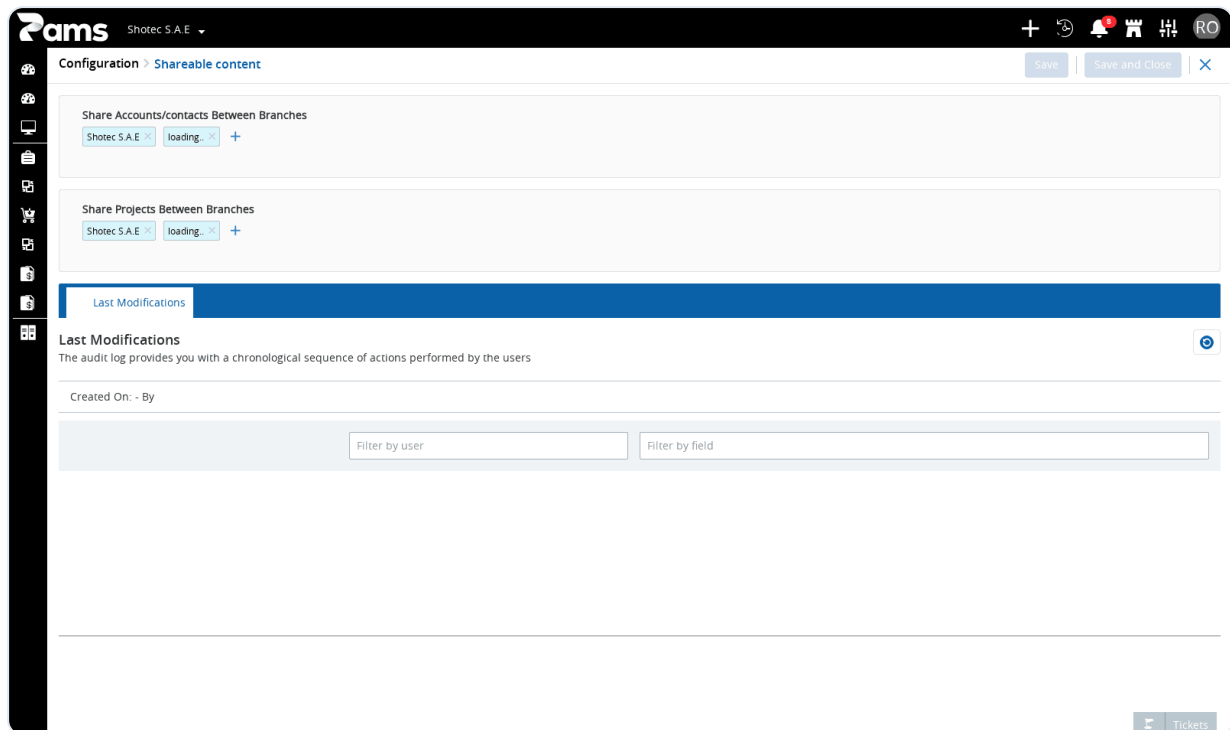
Understand the screen

The page presents the sharing settings first and the history area below them. In this view, the two labelled fields are multi-select controls and neither carries a required marker. Use the sharing rows to handle the branch choices before saving.

Area	What you see
Account sharing	Share Accounts/contacts Between Branches
Project sharing	Share Projects Between Branches
Page actions	Save and Save and Close
History action	Last Modifications
History refresh	An icon-only button with the title <code>Refresh</code>
History text	The audit log provides you with a chronological sequence of actions performed by the users

Area	What you see
Readouts	Created On: - By and Tickets

No table appears in this view. The page also presents no dialog or alert message while it is open.



Handle branch-sharing choices

The sharing choices determine which company branches receive a shared object. The page can provide an unlabelled branch picker when branch data exists and the object is set to share with some branches.

Prerequisites

- The page has loaded shared objects and branch data.
- The object uses the share-with-some-branches choice.

Steps

1. Review the row label for the object you want to configure: **Share Projects Between Branches**, **Share Accounts/contacts Between Branches**, or **Share Contacts Between Branches**.

2. When the unlabeled branch picker appears for the object, select the branches to include.
3. Review the resulting Account and Contact choices before saving.

The three share-option checkboxes are not part of the page's active view. The available sharing choices are no branches, all branches, and some branches, but their checkbox group is unavailable on this page.

The page also does not provide a reader-facing label for the branch picker.

The Account choice can change the Contact choices: sharing an Account with some branches can disable the Contact all-branches choice, while choosing not to share an Account can disable both Contact choices. Sharing an Account with all branches leaves both Contact choices available.

Result: The sharing rows show the branch choices available for the loaded data, ready for saving.

Continue to Save sharing settings to save the selected choice.

Save sharing settings

Save the selected sharing choice after reviewing the rows. The page enables the save actions only when you have editing permission and the data has changed.

Prerequisites

- You have editing permission for the page.
- You have changed a sharing choice.

Steps

1. Choose one action:

If you need to...	Select
Keep the page open	Save
Save and leave the page	Save and Close

2. Read the result shown by the page.

When the save succeeds, the page displays `Your request was completed successfully`.

Save keeps

the page open and refreshes the modification history. **Save and Close** leaves the page.

Result: If the save succeeds, go directly to Review modifications and continue to review the refreshed history or the route after **Save and Close**. If the save fails, go to When saving does not work to review the message and conditions.

When saving does not work

Use the message shown by the page to distinguish a failed save from the successful result.

Prerequisites

- You have editing permission for the page.
- You have changed a sharing choice.

Steps

1. Read the message shown after you select **Save** or **Save and Close**.
2. Identify the result and take the matching action:

Result	Action
An error occurred while processing your request	Review the editing and changed-data conditions.
No dialog or alert	Continue with the page controls that are visible.

Result: You have identified whether the page displayed the success message `Your request was completed successfully` , the error message `An error occurred while processing your request` , or no message. After correcting the editing or changed-data condition, return to Save sharing settings and select **Save** or **Save and Close** again.

Review modifications and continue

The history area remains on the Shareable content route when **Last Modifications** is selected.

Prerequisites

- The company identity is available.
- The sharing configuration is included in your subscription.

Steps

1. Select **Last Modifications**.
2. Review the audit-log text `The audit log provides you with a chronological sequence of actions performed by the users`.
3. After saving without leaving the page, review the refreshed history area.

Result: The **Last Modifications** area is open at `/configuration/shareable-content`. For branch

records that need separate maintenance, continue to Company branches.