

Snap User - User Documentation

Version 2.0 - Salesforce AppExchange – June 3, 2026

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Setup

User Setup

Permission Sets

Declarative Everything Snap User Admin
Provides access to the Snap User app and User Configurations.

User Interface Setup

Apps

Snap User App

The Snap User app contains the User Configuration list and record pages, where User Configurations can be configured.

Page Layouts

User Page Layout

The User Configuration field must be added to the active User page layout to enter User Configuration values from the Salesforce UI.

User Configuration Setup

Create User Configuration

User Configuration Name

The name of the user configuration.

Note: This value must be unique, and cannot be changed after the User Configuration is created. This is to preserve assignments to users that are already linked to a User Configuration.

License

The license a User Configuration belongs to. The default value is none. This field limits User Configuration Lines to the license selected on the User Configuration, to avoid assigning permission sets and other items that cannot be assigned to a user because of their license.

Note: This value cannot be changed after the User Configuration is created. This is to preserve assignments to users that are already linked to a User Configuration.

Manage User Configuration Lines

Permission Sets

Assign or remove assignment of permission sets to users. Permission Sets can be selected in the Available section, and removed from the Selected section by clicking Down Arrow > Delete on a selected Permission Set.

Permission Set Groups

Assign or remove assignment of permission set groups to users. Permission Set Groups can be selected in the Available section, and removed from the Selected section by clicking Down Array > Delete on a selected Permission Set Group.

Permission Set Licenses

Assign or remove assignment of permission set licenses to users. Permission Set Licenses can be selected in the Available section, and removed from the Selected section by clicking Down Array > Delete on a selected Permission Set License.

Package Licenses

Assign or remove assignment of package licenses to users. Package Licenses can be selected in the Available section, and removed from the Selected section by clicking Down Array > Delete on a selected Package License.

Execution

Apply User Configurations To Users

User Configuration Field Changes

There is a User Configuration (decl_batch__User_Configuration__c) field on the standard User object. Entering the User Configuration Name from a User Configuration into this field will apply the User Configuration Lines from the User Configuration to the User.

If the User Configuration on the User record is changed, then the User Configuration Lines on the previous User Configuration are removed and the User Configuration Lines on the new User Configuration are applied.

If the User Configuration on the User record is removed, then the User Configuration Lines on the previous User Configuration are removed.

User Configuration Changes

If the User Configuration is deleted, the User Configuration Lines on User records with the deleted User Configuration are removed.

Note: User Configuration deletion can be undone by navigating to Recycle Bin in the App Launcher and restoring the User Configuration record.

User Configuration Line Changes

If a User Configuration Line is added to or removed from a User Configuration, the change is applied to all User records with that User Configuration.

Note: User Configuration Line deletion can be undone by navigating to Recycle Bin in the App Launcher and restoring the User Configuration Line record.

Additional Considerations

1. It is highly recommended that the out of the box Salesforce lightning record pages included in this package are used and unchanged.
2. The picklist values on Snap User object fields should remain unchanged.
3. To suggest additional features, contact support@powerblocksapps.com.