

LevelUp Groups User Guide

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Introduction

Welcome to the LevelUp Groups User Guide!

LevelUp Groups is a managed package available on the Salesforce AppExchange. This guide is designed to help you get started with our powerful application which is seamlessly integrated into your Salesforce environment. Follow these steps to ensure a smooth onboarding process.

LevelUp Groups breaks down limitations that are present in the out of box public group configuration screens. This app will greatly improve and simplify your public group management. Empower any user to start managing public groups and free up valuable Salesforce administrators time.

Video Guides

You can find a video setup guide [here](#).

A video to explain out of box features vs LevelUp Groups is available [here](#).

Key Features

The main goal of LevelUp Groups is to provide the ability to manage public groups without over extending system permissions. The Public Groups interface has also been greatly enhanced and can handle thousands of records at a time. We make searching, adding and managing easy.

LevelUp Groups gives you the flexibility to define public group administrators without ever assigning the **Manage Users** permission. You can read more about why that should be avoided on the [Salesforce documentation](#).

Public Group Admins

Make any user you want a public group admin while limiting them to the public groups you define. We have 3 ways to designate a user as a public group admin. The following assumes the user has a **LevelUp Groups User** permission set assigned.

1. At a user level. This is the most granular we can get. Assign specific users as admins of specific public groups. That means John Doe can manage a single or multiple public groups without ever contacting the admin.
2. Using a profile. Let's say you always want your users with the **Sales** profile to manage x, y & z groups. Now they can. Simply select a profile as a group admin. Anyone assigned to that profile will gain access.
3. Using a Permission set. You can select a permission set as a group admin. Anyone we find with this permission set assigned will gain access to manage the public group.

Public Group Management

The LevelUp Groups app increases productivity and makes dealing with large public groups much easier. You are no longer limited to viewing 100 group members. Now we can show you them all in one easy screen.

We've added filtering, sorting and pagination to help you efficiently manage your public groups.

Before saving we give you the ability to review all of the changes you are making to the public groups. No more mistakes.

LevelUp groups brings in essential information to set up your public groups correctly. No more guessing if you've selected the correct user. We show you the unique fields so you can be sure you are targeting the right group members.

Public Group Creators

Now your users can create public groups without being assigned the **Manage Users** permission.

Installation

Prerequisites

Before you begin the installation process, ensure that you have the following:

- Salesforce Administrator Privileges in the target installation org

Installation Steps

1. Log in to your Salesforce instance.
2. Navigate to the Salesforce AppExchange or follow this link.
3. Search for LevelUp Groups and select it from the results.
4. Click the "Get It Now" button.
5. Follow the onscreen instructions to complete the installation
6. We recommend you only install the application for admins. You can target specific users for use later

Configuration

After installation, configure LevelUp Groups to tailor it to your organization's needs.

Accessing Settings

1. Open your Salesforce instance in Lightning.

2. Click the App Launcher.
3. Search for LevelUp Groups and launch the app. This is the main app used for all LevelUp Groups functionality.
4. The Home tab has setup instructions for you to follow.

Permission Sets

LevelUp Groups ships with a number of permission sets, these permission sets will give your users a tailored way of interacting with the LevelUp Group application.

Main Permission Sets

There are 3 main permission sets in the app. In order to use LevelUp groups your users must be assigned one of these permission sets. Assign your users the appropriate permission set.

LevelUp Groups Admin

The LevelUp Groups Admin permission set is your super user.

A user assigned this permission set will gain the following level of access:

1. Access to assign other users as admins for specific public groups.
2. Access to view and manage members of all public groups in your org.
3. Access to create public groups

LevelUp Groups Manager

The LevelUp Groups Manager permission set is an elevated user.

A user assigned this permission set will gain the following level of access:

1. Access to view and manage members of all public groups in your org.

LevelUp Groups User

The LevelUp Groups User permission set is the one you will likely assign to the majority of your user base.

A user assigned this permission set will gain the following level of access:

1. Access to view and manage members of public groups which they have been granted access to. This access is granted by a user with the **LevelUp Groups Admin** permission set.

Additional Permission Sets

We have a couple of other permission sets that can be leveraged to extend the access of your users

LevelUp Groups Creator

Assign this Permission Set with care and ensure your users are well trained.

A user assigned this permission set will gain the following level of access:

1. The ability to create Public Groups

LevelUp Groups Editor

Assign this Permission Set with care and ensure your users are well trained.

A user assigned this permission set will gain the following level of access:

1. The ability to edit public group information. Specifically the user will be able to change the **Group Label**.

Assigning Public Group Admins

Anyone assigned the **LevelUp Groups User** permission set will need to be given explicit access to manage a particular public group.

As a user with the **LevelUp Groups Admin** permission set:

1. Navigate to the levelUp groups app.
2. Search for the public group which you want to make a specific user an admin of.
3. Click the **Manage Admins** button for the group.
4. Select an **Available Member** by clicking the **Add to Group** button. The member will be added to the Selected Group Admins table.
5. **Click the Save Changes button**
6. When your designated user accesses LevelUp Groups they will be able to view and manage the groups which you have made them an admin of.

If you assign a Profile or a Permission set as a public group admin, any user with one of those assigned will be able to manage the public group. This assumes the user already has a **LevelUp Groups User** permission set assigned.