

Admin: Automatically Add or Remove Permission Set(s) and License(s)



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Introduction

Automatically Add or Remove Permission Set(s) and License(s), or Permission Set Group(s) and License(s) from a User's record via a picklist field. Many times, when a Permission Set or Group has an associated License, when the Permission is removed, the License is not. This Flow solves this issue. Additionally, Administrators can perform a bulk update to User Records to assign/remove (or reset) their Permission Set or Permission Set Group Assignments and Licenses.

- Assign multiple Permissions Sets or Permission Set Groups, and any associated Licenses using a custom field
- Remove multiple Permissions and any associated Licenses using the same custom field
- Mass Update the custom field, to assign and remove permissions for multiple users at one time

System requirements:

Available for use in Enterprise, Unlimited, Developer, and Professional Editions of Salesforce.

Admin: Automatically Add or Remove Permission Set(s) and License(s) is a free solution designed to optimize the Administration experience.

Installation Guide

1. Login with your trailhead email and navigate to our listing on [Appexchange Listing](#)
2. Click on the [Get it Now] from the listing and select the org you want to install it in from the drop down
3. Agree to the terms and conditions
4. Once you have redirected to the Salesforce login page, enter the credentials for the Salesforce org you wish to install the solution in
5. Select the profiles you wish to access the solutions (recommend Admins Only)

Set Up Guide

You will need the API Names of the Permission Sets, and Permission Set Groups you want to add to the **User Function** Field

1. From **Setup**, navigate to Custom Objects, and then the **User** custom object
2. From **User Page Layouts** section, open the **User Layout** page layout
 - a. Add the custom field **User Function** to the page layout, and click the **[Save]** button

***TIP:** You can make the field required on the Page Layout if you always want to ensure that a User Record uses the User Function field and flow*
3. From **Fields & Relationships** section, find the **User Function** field, and click on it
 - a. Update the Picklist values
 - b. Make sure the API Name of the picklist value matches the API Name of one of your Permission Sets or Permission Set Groups

How to Use

1. From a User record, Click on the **[Edit]** button
2. Scroll down to the **User Function** field, and add/remove the functions the User should or should not have, and click on the **[Save]** button