

Admin: Automatically Add or Remove a User from Public Group(s)



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Introduction

Automatically Add or Remove a User from Public Group(s) from a User's record via a picklist field.

Additionally, Administrators can perform a bulk update to User Records to assign/remove (or reset) Users Public Group Memberships.

- Assign multiple Public Groups using a custom field on the User record
- Remove Public Groups membership using the same custom field on the User record
- Mass Update the custom field, to manage Public Group membership 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 a User from Public Group(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] button 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 Public Group you want to add to the **Public Group Assignment** 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 **Public Group Assignment** 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 Public Group Assignment field and flow*
3. From **Fields & Relationships** section, find the **Public Group Assignment** 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 your Public Group

How to Use

1. From Setup → Process Automation → Flows, activate the Flow: **Update User Public Group Assignments**
2. From a User record, Click on the **[Edit]** button
3. Scroll down to the **Public Group Assignment** field, and add/remove the values the User should or should not have, and click on the **[Save]** button
4. Verify that the User has the correct Public Group Assignment(s) based on the values selected in the **Public Group Assignment** field