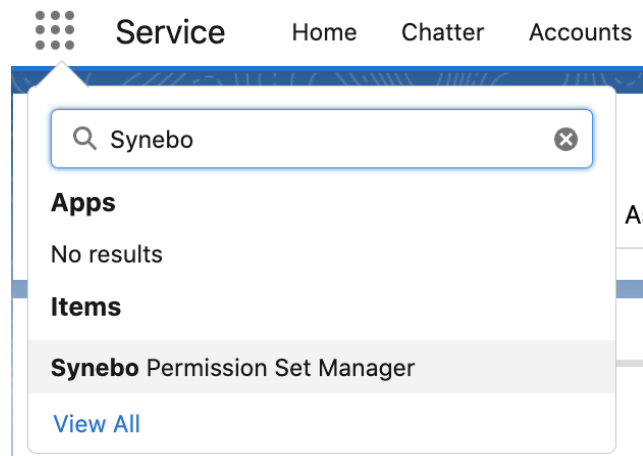
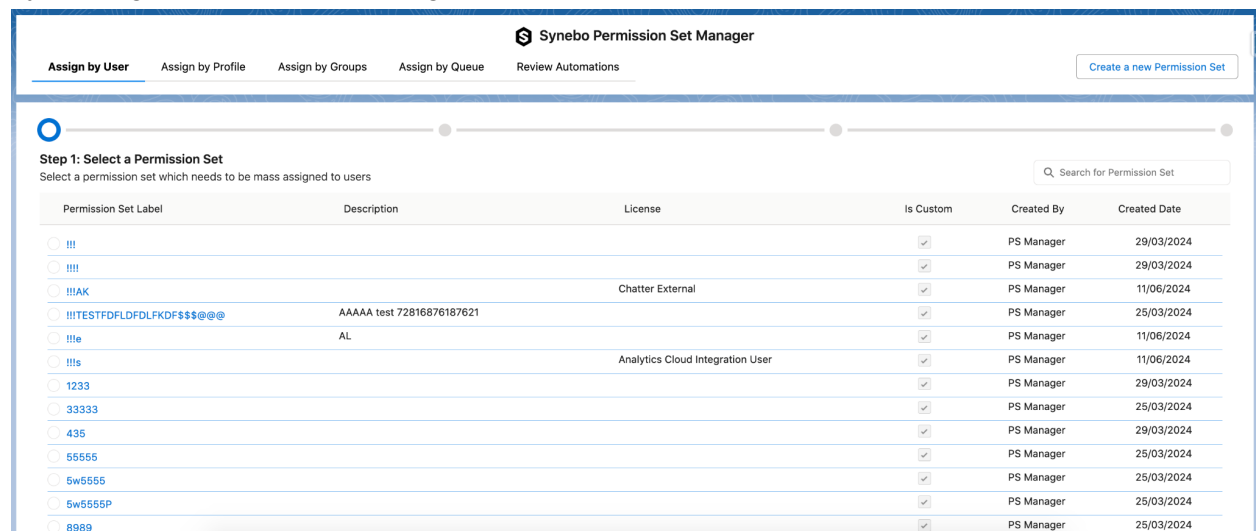


Synebo Permission Set Assignment - Product Guide

This application can be navigated by the App Launcher in the Salesforce organization.



By clicking, it opens the main page of the application.



The header of the app has 4 main tabs and one button.

Assign by User

This tab has 4 steps, by the end of the last step, the permission set assignment or/and unassignment to users process will start.

Step 1 - Select a Permission Set

Step 1 allows you to select a permission set to which a new assignment will be created in the next steps.

○

Step 1: Select a Permission Set

Select a permission set which needs to be mass assigned to users

Q Search for Permission Set

Permission Set Label	Description	License	Is Custom	Created By	Created Date
☐ IIII			☒	PS Manager	29/03/2024
☐ IIII			☒	PS Manager	29/03/2024
☐ IIIAK		Chatter External	☒	PS Manager	11/06/2024
☐ IIITESTDFLDFLDFKDF\$\$\$@#@	AAAAA test 72816876187621		☒	PS Manager	25/03/2024
☐ IIIf	AL		☒	PS Manager	11/06/2024
☐ IIIfs		Analytics Cloud Integration User	☒	PS Manager	11/06/2024
☐ 1233			☒	PS Manager	29/03/2024
☐ 33333			☒	PS Manager	25/03/2024
☐ 435			☒	PS Manager	29/03/2024
☐ 65555			☒	PS Manager	25/03/2024
☐ 6w5555			☒	PS Manager	25/03/2024
☐ 6w5555P			☒	PS Manager	25/03/2024
☐ 9999			☒	PS Manager	25/03/2024

You can select only one permission set during the process.

The page allows you to search for the needed permission set using the search box at the upper right corner. The table can be sorted absent or descent by clicking on any column header.

After selecting a permission set, click the Next button. This will navigate you to the next step.

☐ SeaS Indexing C2C User Perm

Allows the user to access entities indexed by SeaS I...

Cloud Integration User

☐

21/09/2023

☐ Security Center Integration User

Access Security Center for Integration

Cloud Integration User

☐

21/09/2023

☒ Service Cloud User

Denotes that the user is a Service Cloud user.

Service User

☐

21/09/2023

☐ Shopper

☒

PS Manager

22/04/2024

Next

Step 2 - Configure user assignment

This step has two tabs: “Assign the permission set to users” and “Unassign the permission set from users”. Both have a search box and a filter button, which helps to find needed users.

Filters

Unassign the permission set from users

Q Search for Users

▼

▼ Active

Free User

Free User

Free User

Free User

Free User

Free User

Free User

Filters

×

Add Filter by User field

Remove all

Filter by Profile

None

Filter by Queue

None

Filter by Group

None

Filters allow you to filter in and out users by the profile/queue/groups they are related to. It also allows you to set custom criteria by User object fields and set filtering logic.

Filters

Add Filter by User field

Remove all

(1 OR 2) AND 3

1

Active* equals false

2

Phone* contains 380

3

Last Name* contains Smith

Cancel

Save

Assign the permission set to users

This tab allows you to select users to whom the permission set selected in the previous step will be assigned. Clicking on the “Next” button will navigate you to the next step.

Note: Only active users are displayed in the table. Add [filtering](#) to check inactive users.

Assign the permission set to users						Unassign the permission set from users	
Note: Only active users displayed. Add filtering to check inactive users.						Search for Users	
☐	Full Name	Alias	Username	Role	Profile	Active	Last Login
☒	afdgfd	afdgf	cateb456erttr8@glaslack.com		Chatter Free User	☒	
☒	ALENA	alen	hophey@synebo.io		Chatter Free User	☒	
☒	alena	alen	awwwwwlenna.chaban@syne...		Chatter Free User	☒	
☐	Automated Process	autoproc	autoproc@00d7r000005dbth...			☒	
☐	bbbbbb	bbbb	bbbb@mailto.plus	Marketing Team	Identity User	☒	
☐	bnmnmnmnm	bnmn	kimik@bombamail.icu	Marketing Team	Identity User	☒	
☐	cccc	cccc	cccc@mailto.plus	Marketing Team	Identity User	☒	
☐	cccc	cccc	cco@mailto.plus	Marketing Team	Identity User	☒	
☐	Chatter Expert	Chatter	chatty.00d7r000005dbthua...		Chatter Free User	☒	
☐	chattertest	chat	chaonjiit@gmail.com		Chatter Moderator User	☒	
☐	copied user	copi	ergerg@mailto.plus	Marketing Team	Identity User	☒	
☐	Data.com Clean	autocln	automatedclean@00d7r0000...			☒	
☐	dfnfdn	dfnfd	cate45638@glaslack.com		Chatter Free User	☒	
☐	eeee	eeee	eeee@mailto.plus	Marketing Team	Identity User	☒	
☐	erte	erte	cate4568@olaslack.com		Chatter Free User	☒	
Previous						Next	

Unassign the permission set from users

This tab allows you to see the list of users who have the selected permission set assigned to them. Select users to unassign them from this permission set. Clicking the “Next” button will navigate you to the next step.

Note: By default, only active users are displayed in the table. Add [filtering](#) to check inactive users.

Assign the permission set to users

Unassign the permission set from users

Note: Only active users displayed. Add filtering to check inactive users.

Full Name

Alias

Username

Role

Profile

Active

Last Login

cccc

cccc

cco@mailto.plus

Marketing Team

Identity User

Chatter Expert

Chatter

chatty.00d7r000005dbthuau....

Chatter Free User

chattertest

chat

chaonjit@gmail.com

Chatter Moderator User

copied user

copl

ergerg@mailto.plus

Marketing Team

Identity User

Data.com Clean

autocln

automatedclean@00d7r0000...

dfnfdn

dfnfd

cate45638@glaslack.com

Chatter Free User

eeee

eeee

eeee@mailto.plus

Marketing Team

Identity User

erte

erte

cate4568@glaslack.com

Chatter Free User

ertert

erter

aaaadfvdfv@slack.com

Marketing Team

Identity User

etre

etre

cateb456@glaslack.com

Chatter Free User

fdbxc

fdbxc

aaweawe@slack.com

Marketing Team

Identity User

fdsr

fdsr

cateb45638@wertk.com

Chatter Free User

fdvzxf

fdvzx

cateba77777@glaslack.com

Marketing Team

Identity User

ggg

ggg

tobocvcv@mailto.plus

Eastern Sales Team

Identity User

aroud user1

aroud us

doffad@mailto.ulus

Marketino Team

Identiv User

Previous

Next

Step 3 - Confirm the assignment

This step allows you to review the list of users selected in both tabs of step 2 before submitting the assignment.

Step 3: Confirm the assignment.

Confirm the permission set assignment to the selected users. Selected permission set: !!!

1. Confirm the assignment users of listed users to the permission set !!!:

Full Name	Alias	Username	Role	Profile	Active	Last Login
The list of users is empty. Return to the previous step to select users.						

2. Confirm the unassignment users of listed users from the permission set !!!:

Full Name	Alias	Username	Role	Profile	Active	Last Login
cccc	cccc	cco@mailto.plus	Marketing Team	Identity User	☒	
Chatter Expert	Chatter	chatty.00d7r000005dbthuau.d...		Chatter Free User	☒	
chattertest	chat	chaonjit@gmail.com		Chatter Moderator User	☒	

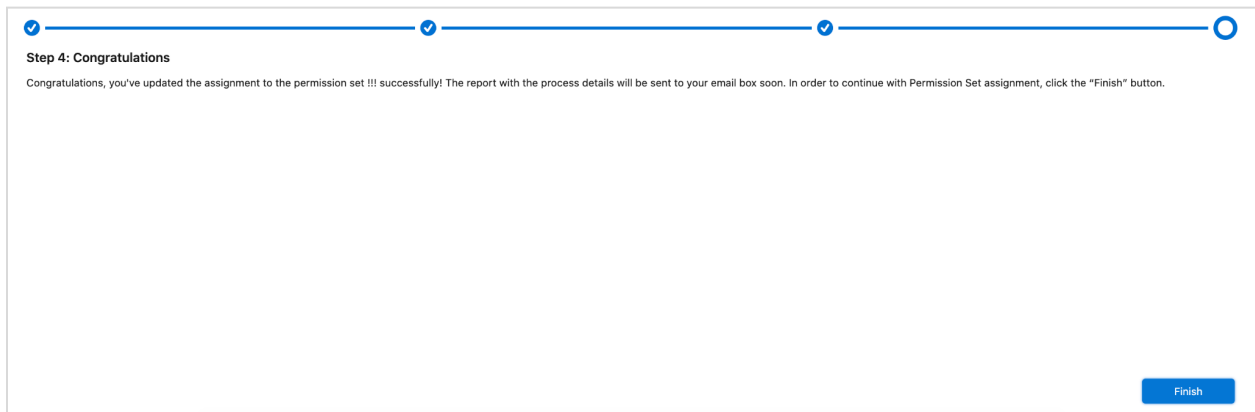
Previous

Confirm

To make some changes, you can navigate back to the previous step via the “Previous” button. If you approve the assignment, click the “Confirm” button.

Step 4 - Congratulations

This step notifies you that the assignment process has started, and the details of its result will be sent to you via email.



Step 4: Congratulations

Congratulations, you've updated the assignment to the permission set !!! successfully! The report with the process details will be sent to your email box soon. In order to continue with Permission Set assignment, click the "Finish" button.

Finish

Assign by Profile

This tab has 4 steps, by the end of the last step, the permission set assignment or/and unassignment process will start.

Using this setting, you can assign/unassign permissions based on user profiles and automatically assign the assignment to the new user of the selected profile.

Step 1 - Select a Permission Set

Step 1 fully repeats [step 1 of the "Assign by User"](#).

Step 2 - Configure the Permission Set assignment to user by Profile

This step allows you to select the profiles, to which users the permission set selected in step 1 will be assigned.

Some profiles might already be selected - that means that by this app the selected permission set was already assigned to users by these profiles.

Step 2: Configure the Permission Set assignment to user by Profile

Configure user assignment to the permission set. Selected permission set: **test Yanaad**

test Yanaad

Assign permission sets to new users automatically ☐

Search for Profiles

Profile Label	License	Custom Profile	Created By	Last Modified
☐ aaa	Analytics Cloud Integration User	☒	PS Manager	09/05/2024
☐ acacaca	Analytics Cloud Integration User	☒	PS Manager	09/05/2024
☐ Analytics Cloud Integration User	Analytics Cloud Integration User		PS Manager	13/02/2024
☐ Analytics Cloud Security User	Analytics Cloud Integration User		PS Manager	13/02/2024
☐ Authenticated Website	Authenticated Website		PS Manager	13/02/2024
☐ Authenticated Website	Authenticated Website		PS Manager	13/02/2024
☐ B2B Reordering Portal Buyer Profile	External Apps Login	☒	Automated Process	13/02/2024
☐ Chatter External User	Chatter External		PS Manager	13/02/2024
☐ Chatter Free User	Chatter Free		PS Manager	13/02/2024
☐ Chatter Moderator User	Chatter Free		PS Manager	13/02/2024
☐ Contract Manager	Salesforce		PS Manager	13/02/2024
☐ ...	...	...	PS Manager	13/02/2024

Enabling the “Assign permission sets to new users automatically” will automatically set permission set assignments to the new users with the selected profiles.

Step 2: Configure the Permission Set assignment to user by Profile

Configure user assignment to the permission set. Selected permission set: [test Yanaad](#)

test Yanaad

Assign permission sets to new users automatically ☐

Step 3 - Confirm the assignment

Before submitting the assignment, this step allows you to review the list of profiles that have been selected or deselected in step 2.

Assign by User

Assign by Profile

Assign by Groups

Assign by Queue

Review Automations

Create a new Permission Set

Step 3: Confirm the assignment.

Confirm the permission set assignment to the users of the selected profiles. Permission Set: **test Yanaad**

1. Confirm the assignment users of listed profiles to the permission set **test Yanaad**:

Profile Label	License	Custom Profile	Created By	Last Modified
Chatter External User	Chatter External		PS Manager	13/02/2024
Contract Manager	Salesforce		PS Manager	13/02/2024

2. Confirm the unassignment users of listed profiles from the permission set **test Yanaad**:

Profile Label	License	Custom Profile	Created By	Last Modified
---------------	---------	----------------	------------	---------------

The list of profiles is empty. Return to the previous step to select profiles.

Previous

Confirm

You can navigate back to the previous step via the “Previous” button in order to make some changes.

If you approve the assignment, click the “Confirm” button.

Step 4 - Congratulations

This step fully repeats the [step 4 of the “Assign by User”](#) tab.

Assign By Groups and Assign by Queue tabs

This tab works with identical logic as the “Assign by Profile” tab. The difference is that it allows you to assign/unassign or set an automatic assignment to users through the Groups and Queues to which they are related.

Synebo Permission Set Manager

Assign by User

Assign by Profile

Assign by Groups

Assign by Queue

Review Automations

Create a new Permission Set

Step 1: Select a Permission Set

Select a permission set which needs to be mass assigned to users

Q Search for Permission Set

Permission Set Label	Description	License	Is Custom	Created By	Created Date
!!!			✓	PS Manager	29/03/2024
!!!!			✓	PS Manager	29/03/2024
!!!IAK		Chatter External	✓	PS Manager	11/06/2024
!!!TESTFDLDFDLFKDF\$\$\$@#@	AAAAA test 72816876187621		✓	PS Manager	25/03/2024
!!le	AL		✓	PS Manager	11/06/2024
!!ls		Analytics Cloud Integration User	✓	PS Manager	11/06/2024
1233			✓	PS Manager	29/03/2024
33333			✓	PS Manager	25/03/2024
435			✓	PS Manager	29/03/2024
55555			✓	PS Manager	25/03/2024
5w5555			✓	PS Manager	25/03/2024
5w5555P			✓	PS Manager	25/03/2024

Review automations

This tab shows the list of the permission sets.

Synebo Permission Set Manager

Assign by User

Assign by Profile

Assign by Groups

Assign by Queue

Review Automations

Create a new Permission Set

Review automations

Review existing permission set assignments created for users by their profiles/groups/queue

Q Search for Permission Set

!!!

> !!!!

> !!!IAK

> !!!TESTFDLDFDLFKDF\$\$\$@#@

> !!le

> !!ls

> 1233

> 33333

> 435

> 55555

> 5w5555

> 5w5555P

> 8989

> Alena_1

Expanding a permission set lets you see the list of all assignments and automations (by profile/group/queue) created for the permission set via this app.

Review automations

Review existing permission set assignments created for users by their profiles/groups/queue

▼ III

Selected profiles

Assign permission set to new users of the profiles automatically

Profile Label	License	Custom Profile	Created By	Last Modified
acacaca	Analytics Cloud Integration User	☒	PS Manager	09/06/2024
Analytics Cloud Integration User	Analytics Cloud Integration User	☐	PS Manager	13/02/2024
Analytics Cloud Security User	Analytics Cloud Integration User	☐	PS Manager	13/02/2024
Authenticated Website	Authenticated Website	☐	PS Manager	13/02/2024

Selected groups

Assign permission set to new users of the groups automatically

Group Label	Group name	Created By	Created Date
Administrator	Administrator	PS Manager	12/02/2024
Agent	Agent	PS Manager	12/02/2024
GROUP K	GROUP_K	PS Manager	20/03/2024
New not empty group	New_empty_group	PS Manager	19/03/2024

Selected queues

Assign permission set to new users of the queues automatically

Queue Label	Queue name	Queue Email	Supported object	Modified By	Last Modified
Administrator	Administrator	formformformform@gmail.com	Account Brand, Case	PS Manager	22/03/2024
Agent	Agent		Case	PS Manager	29/03/2024
ALENA QU	ALENA_QU		Account Brand, Account Relationship, Alt...	PS Manager	11/06/2024
QA	QA		Case	PS Manager	25/04/2024

Create a new Permission Set button

Clicking on this button navigates you to the screen flow that will allow you to create a new Permission Set

Step 1

It proposes you select how the new permission set will be created:

- *Create an empty Permission set* - creates a new, empty permission set
- *Create a Permission set copied from existing Permission Set* - selecting this option, you'll be able to create a permission set, copying its setting from another already existing one
- *Create a Permission set copied from the existing Profile* - selecting this option, you'll be able to create a permission set, copying its setting from the profile

Step 2

This step requires you to fill fields needed for the new permission set.

Synebo Permission Set Manager

Assign by UserAssign by ProfileAssign by GroupsAssign by QueueReview Automations

Create a new Permission Set

Step 2: Configure the Permission Set properties

Label

API Name

Description

Session Activation Required

Previous

Next

If you want to create a new permission set by copying its settings from another permission set, an additional field will show up:

Select a Permission Set to copy its settings * -None- ▼

All permissions in the selected permission set will be copied into the new one.

If you want to create a new permission set by copying its settings from the profile, an additional field will show up:

Select a Profile to copy its settings * -None- ▼

All permissions in the selected profile will be copied into the new permission set.