Assign or Unassign the Financial Services Cloud Permission Set License to Many Users

Streamline permission set license assignment by following these bulk assignment steps. Permission set licenses and permission sets have different purposes. Permission set licenses extend the functionality of a user license, and permission sets extend a user's functional access without changing a user's profile. When you assign a permission set, you are also assigning the associated permission set license.

Prerequisites

Before you begin:

- You must have administrator permissions and access to the Company Profile panel of your org.
- Salesforce Data Loader must be installed to obtain the internal IDs of users as well as the internal ID of the Financial Services Cloud Standard permission set. For more information, see the Data Loader Guide.
- You need a spreadsheet application that handles CSV files, such as Microsoft Excel or Google Sheets.

Bulk Assign Permission Set Licenses

Bulk assigning the Financial Services Cloud Standard permission set and permission set license for several users involves these high-level actions.

- Use Data Loader to obtain the unique ID of the permission set.
- Use Data Loader to generate a CSV file of all users and their unique internal IDs.
- Create another CSV file combining the permission set ID with each user's ID.
- Upsert the new CSV file using Data Loader.
- Verify that the permission set and permission set license have been assigned.

Follow these steps to bulk assign a permission set and permission set license for several users:

1. Log in to the company org as administrator and go to **Setup**.

2. Check to see how many licenses are assigned.

   a. Go to **Company Profile** > **Company Information** and click **Permission Set Licenses**.

   b. Under Permission Set Licenses, check that you have sufficient Financial Services Cloud Standard licenses for all the users you want to assign.

3. Launch Data Loader. Click **Export**, log in and grant access to the company org.

4. Click **Show all Salesforce objects** and select the **User** object.

5. Enter a unique name for the new CSV file (for example, `User_Extract.csv`), and browse to where you want to download the generated file. Click **Next**.

6. Select the fields to extract. Click the checkboxes for **Id**, **LastName**, and **FirstName**. To locate only active users, set the **IsActive** field to **true**.

7. Click **Finish** and then **Yes** to confirm that you want to proceed.

8. Open the downloaded CSV file, and confirm that it has three columns (fields): user ID, last name, and first name. Although you only need the ID, the last and first names make it easier to identify the user.

9. To obtain the internal ID for the permission set, return to the Data Loader Export tab.

    a. Click **Show all Salesforce objects** and select **Permission Set**.

    b. Give the target a unique file name (for example, `PermSet_extract.csv`), and click **Next**.

    c. In the panel of query fields, enter the following in the text box: *Select Id, Name, Label FROM PermissionSet WHERE Name = 'FinancialServicesCloudStandard'*.

    d. Click **Finish** and then **Yes** to confirm that you want to proceed.

10. A single record is created and downloaded. Open the file, and copy the unique ID for the Financial Services Cloud Standard permission set. To assign the permission set ID to all users:

    a. Open a new CSV spreadsheet and enter these headings to the first two columns: *PERMISSIONSETID* and *ASSIGNEEID*.

    b. Copy the user IDs from the `User_Extract.csv` file, and paste them into the spreadsheet's ASSIGNEEID column.

    c. Open the `PermSet_extract.csv` file. It has a single row of data. Copy the first field, which is the internal ID for the Financial Services Cloud Standard permission set, and paste it into the spreadsheet's PERMISSIONSETID column for each user. Be sure that you have sufficient licenses available for all the users you are adding.

    d. Save the spreadsheet with a name like `PermSetAssignments.csv`.

11. Return to Data Loader.

    a. On the Upsert tab, click **Show all Salesforce objects**. Select the object **Permission Set Assignment**.

    b. Browse to the `PermSetAssignments.csv` file and click **Next**.

    c. Click **OK** to verify the operation. Confirm that the Id field is shown as matching the PermissionSetAssignment. Click **Next**.

12. Select the CSV field to map to the Id field of the permission set, and click **Create Map**.

    a. From the list of fields, drag **AssigneeId** to the ASSIGNEEID row in the mapping table.

    b. Drag **PermissionSetId** to the PERMISSIONSETID row. You can save this mapping for later use.

    c. Click **OK**, and then click **Next**.

    d. Choose where to save the success and error files, and click **Finish**.

13. Return to your org and under Company Information check the Permission Set Licenses and Permission Set tables to verify that the licenses and permission sets have been assigned.

Bulk Unassign Permission Set Licenses

Bulk unassigning a permission set and permission set license for several users involves these high-level actions.

- Create a CSV of the users (including their internal IDs) that you want to unassign.

- Obtain the ID of the permission set.

- Obtain the ID of the permission set license.

- Obtain the list of users currently assigned to the permission set.

- Delete the assignments using the permission set assignment CSV file.

- Obtain the list of users currently assigned to the permission set license.

- Delete the assignments using the permission set license assignment CSV file.

- Verify that the permission set and permission set license assignment have been deleted and that you have recovered the proper license count.

Follow these steps to bulk unassign a permission set and permission set license for several users:

1. Launch Data Loader and, from the Export tab, log in and grant access to the company org.

2. Click **Show all Salesforce objects**, and select the **User** object.

3. Enter a unique name for the new CSV file (for example, `User_Extract.csv`), and browse to where you want to download the generated file. Click **Next**.

4. The panel now displayed allows you to select the fields to extract from the user table.

    a. Click the check box for **Id**, **LastName**, and **FirstName**.

    b. Click **Finish**, then click **Yes** to confirm that you want to proceed.

5. Open the downloaded CSV file and confirm that it has three columns (fields): the user's unique ID, last name, and first name. Although only the ID is needed, the last and first name fields make it easy to identify the user.

6. To obtain the internal Id for the permission set, return to the Data Loader Export tab.

    a. Click **Show all Salesforce objects** and select **Permission Set**.

    b. Give the target a unique file name (for example, `PermSet_extract.csv`) and click **Next**.

    c. In the panel of query fields, enter the following explicit query into the text box: *Select Id, Name, Label FROM PermissionSet WHERE Name = 'FinancialServicesCloudStandard'*.

    d. Click **Finish**, then **Yes** to confirm and start the export.

7. A single record is created. Open the downloaded file and copy the ID for the Financial Services Cloud Standard permission set.

8. To obtain the unique internal Id for the permission set license, return to the Data Loader Export tab.

    a. Click **Show all Salesforce objects** and select **Permission Set License**.

    b. GIve the target a unique file name (for example, `PermSetLicense_extract.csv`) and click **Next**.

    c. In the panel of query fields, enter the following query into the text box: *Select Id, DeveloperName, MasterLabel FROM PermissionSetLicense WHERE MasterLabel = 'Financial Services Cloud Standard'*.

    d. Click **Finish** and then **Yes** to confirm and start the export.

9. This query creates a single record. Open the downloaded file and copy the ID for the Financial Services Cloud Standard permission set license.

10. Create a list of users currently assigned to the permission set by querying for the permission set ID.

    a. Return to the Data Loader Export tab.

    b. Click **Show all Salesforce objects** and select **Permission Set Assignment**.

    c. Give the target a unique file name (for example `PermSetAssignment_extract.csv`) and click **Next**.

    d. In the panel of query fields, enter the following explicit query into the text box: *Select Id, PermissionSetId, AssigneeId FROM PermissionSetAssignment WHERE PermissionSetId = 'YOUR_UNIQUE_PERMSET_ID'*. Enter the previously obtained permission set Id in place of *YOUR_UNIQUE_PERMSET_ID* in the query string.

    e. Click **Finish**, then **Yes** to confirm and start the export.

11. Open the downloaded CSV file and identify which user IDs you want to unassign the permission set. Delete all the rows from the permission set assignment file for those users you want to retain the permission set. The file should only contain rows of assigned users you want to unassign from the Financial Services Cloud Standard permission set.

12. Once you have the file prepared, return to Data Loader and click the **Delete** tab.

    a. Click **Show all Salesforce objects** and select **Permission Set Assignment**.

    b. Choose your prepared permission set assignment CSV file (`PermSetAssignment_extract.csv`) and click **Next**.

    c. Click **OK** to verify the correct number of rows to be deleted.

    d. The next panel shows the three fields in the CSV file, and asks you to select the CSV fields to be mapped. Click **Create Map**, and in the next panel select **Auto-Match Fields to Columns**. The ID field is mapped to Id. You can save this mapping for use in future bulk unassigns.

    e. Click **OK**, then **Next**.

    f. Specify where you would like to save the success and error files, then click **Finish**.

    g. To proceed with the record deletion process, click **Yes**.

    h. Confirm the Recycle Bin information, and click **Yes** to start the job.

13. Verify that the users have been unassigned from the Financial Services Cloud Standard permission set.

14. Create the list of users currently assigned to the permission set license by querying for the permission set license ID. Return to the Data Loader and Export tab.

    a. Click **Show all Salesforce objects** and select **Permission Set License Assignment**. Give the target a unique file name (for example, `PermSetLicenseAssignment_extract.csv`) and click **Next**.

    b. In the panel of query fields, enter the following into the text box: *Select Id, PermissionSetLicenseId, AssigneeId FROM PermissionSetLicenseAssign WHERE PermissionSetLicenseId = 'YOUR_UNIQUE_PERMSET_LICENSE_ID'*. Enter the previously obtained permission set license ID in place of *YOUR_UNIQUE_PERMSET_LICENSE_ID* in the query string.

    c. Click **Finish** and then **Yes** to confirm and start the export.

15. Open the downloaded CSV file and identify which user Ids you want to unassign from the permission set license. In the file, delete all the rows for any users you want to retain the permission set license. The file should only contain rows of users you want to unassign from the Financial Services Cloud Standard permission set license. Once you have the file prepared, return to Data Loader and click **Delete**.

    a. Click **Show all Salesforce objects** and select **Permission Set License Assignment**. Choose your prepared permission set license assignment file (`PermSetLicenseAssignment_extract.csv`) and click **Next**.

    b. Verify that the number of rows to be deleted is correct and click **OK**.

    c. To select the CSV fields to be mapped, click **Create Map**, and in the next panel select **Auto-Match Fields to Columns**. The ID field is mapped to Id. You can save this mapping to use in future bulk unassigns.

    d. Click **OK**, then **Next**.

    e. Specify where to save the success and error files, then click **Finish**.

    f. Click **Yes** to proceed.

    g. In the pop-up warning about the Recycle Bin, click **Yes** to start the job.

16. Verify that the correct number of licenses have been recovered. Go to **Company Profile | Company Information**, click **Permission Set Licenses**, and check the number of licenses for the Financial Services Cloud permission set.