

# Using Salesforce Groups to Target Users

## Brief Overview

Within WalkMe for Salesforce, you can use Salesforce Groups to segment WalkMe items. This allows you an additional way to segment items besides the default Salesforce variables available.

### Enabled Feature

To request access for Salesforce Groups, please reach out to your Customer Success Manager or WalkMe contact.

## Short Version

A group is a collection of users created by your Salesforce Administrator. Use Salesforce groups in the Segmentation Center to target specific users and present them with only relevant items. For example, if some ShoutOuts only apply to a group of coworkers who want to rideshare, use the SF Groups Rule Type to create a segment.

### Note

This method differs from the Salesforce variables configuration in that it uses Salesforce **Public Groups** instead of creating variables out of Salesforce *User Fields*. For setting up segmentation based on out-of-the-box user fields such as Username and Role ID, please refer to the following article: [Salesforce Variables](#)

## How It Works

Your Salesforce Administrator can create groups in Salesforce to better enable people who work together to share information. Groups can be used to share records and other information within a specified workgroup. These groups will be present in your implementation in the form of a variable.

Once these groups have been created, they can be utilized within the Segmentation Center. Salesforce Groups are checked against the value defined in the Segmentation Rule.

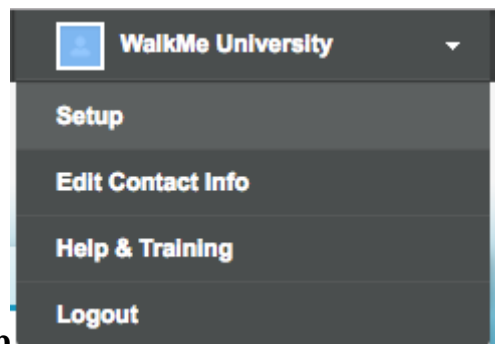
To use the Salesforce Groups within the Rule Engine, the Variable name must start with “**walkme\_sf\_vars.userGroups**”.

Note

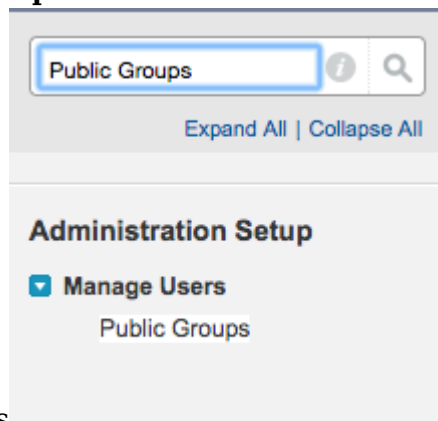
If you are using legacy sfGroups, the variable name must start with “**walkme\_SF\_Groups**” instead.

## Finding Your Salesforce Group

1. Log in to your Salesforce Instance



2. Click your profile name and then **Setup**
3. In the Quick Find, type **Public Groups**



4. Click **Public Groups** in the results
5. Select your Group

### Public Groups

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A public group is a set of users. It can contain individual users, other groups, the users in a particular role or territory, or the users in a role or territory plus all of the users below that role or territory in the hierarchy.

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Action	Label ↑	Group Name	Created By	Created Date
	GROUP A	GROUP_A	ADMINA	10/9/2016 6:44 PM

6. Use the Group Name listed in the Rule Engine

Group  
**GROUP A**

Label	GROUP A
Group Name	GROUP_A
Grant Access Using Hierarchies	<input checked="" type="checkbox"/>
Created By	ADMIN A, 10/9/2016 6:44 PM

### Note

Either Group Label or Group Name can be used in the text field of the rule as it will output the label along with the ID.

## Create a Rule Using a Salesforce Group

### Get Started

Have your Salesforce Administrator provide you with a list of all the Group Labels that are part of your Salesforce instance.


1. Open the Rule Engine in the WalkMe Editor
2. Select the **User Data** rule type
3. Choose **Variable**
4. In the text field, type **walkme\_sf\_vars.userGroups**
  - **Note:** If you are using legacy sfGroups type **walkme\_SF\_Groups**

Segmentation ⓘ
×

Create a rule to define this Segment

Group
Import Rules

☐


User Data

Variable

walkme\_SF\_Groups

...

Add Rule

Current Statement: Run Time: 0ms

Cancel
Done

5. Select **Like** from the operator dropdown

6. In the text field, type in your group name surrounded by an asterisk “\*”

☐


User Data

Variable

walk...

Like

\*Admin & Key Users\*

...

*In the example above, the name of the group is Admin & Key Users. This text will change based on the name of the group, but will always be preceded and followed by an asterisk.*

7. Click **Add Rule**

8. Click **Done**