

# CREATE THE PERMISSION SET FOR TWO USERS

## Create Users

Permission sets and permission set groups are worthless without users. So first, add two users to your org.

1. In Setup, open Users.
2. Create two users:

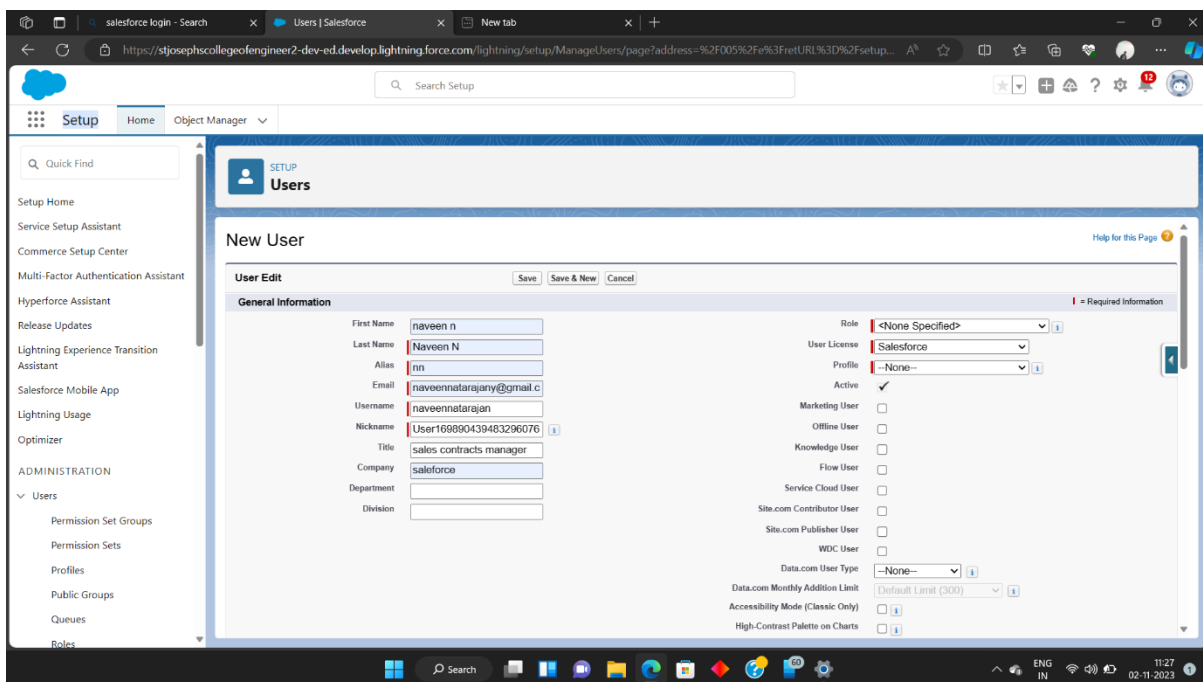
Naveen N

Title: Sales Contracts Manager

License: Salesforce

Profile: Minimum Access – Salesforce

Email: Enter any email address. The Username and Nickname populate automatically.



The screenshot shows the Salesforce Setup interface for creating a new user. The left sidebar contains navigation links for Setup Home, Service Setup Assistant, Commerce Setup Center, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and ADMINISTRATION. Under ADMINISTRATION, the 'Users' link is selected, showing sub-links for Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, and Roles. The main content area is titled 'New User' and contains a 'User Edit' form. The form has tabs for 'General Information' (selected) and 'Advanced Information'. The 'General Information' tab includes fields for First Name (naveen n), Last Name (Naveen N), Alias (nn), Email (naveennatarajan@gmail.com), Username (naveennatarajan), Nickname (User160890439483296076), Title (sales contracts manager), Company (salesforce), Department, and Division. The 'Advanced Information' tab includes fields for Role (<None Specified>), User License (Salesforce), Profile (<None-->), Active (checked), Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Data.com User Type (<None-->), Data.com Monthly Addition Limit (Default Limit (300)), Accessibility Mode (Classic Only), and High-Contrast Palette on Charts. The bottom of the screen shows the Windows taskbar with the search bar and various application icons.

Click Save & New

Babu M

Title: Sales Coordinator

License: Force.com - Free

Profile: Force.com – Free User

Email: Enter any email address. The Username and Nickname populate automatically.

Same as Click Save.

## Create Permission Sets

Ok, let's create a permission set for sales orders.

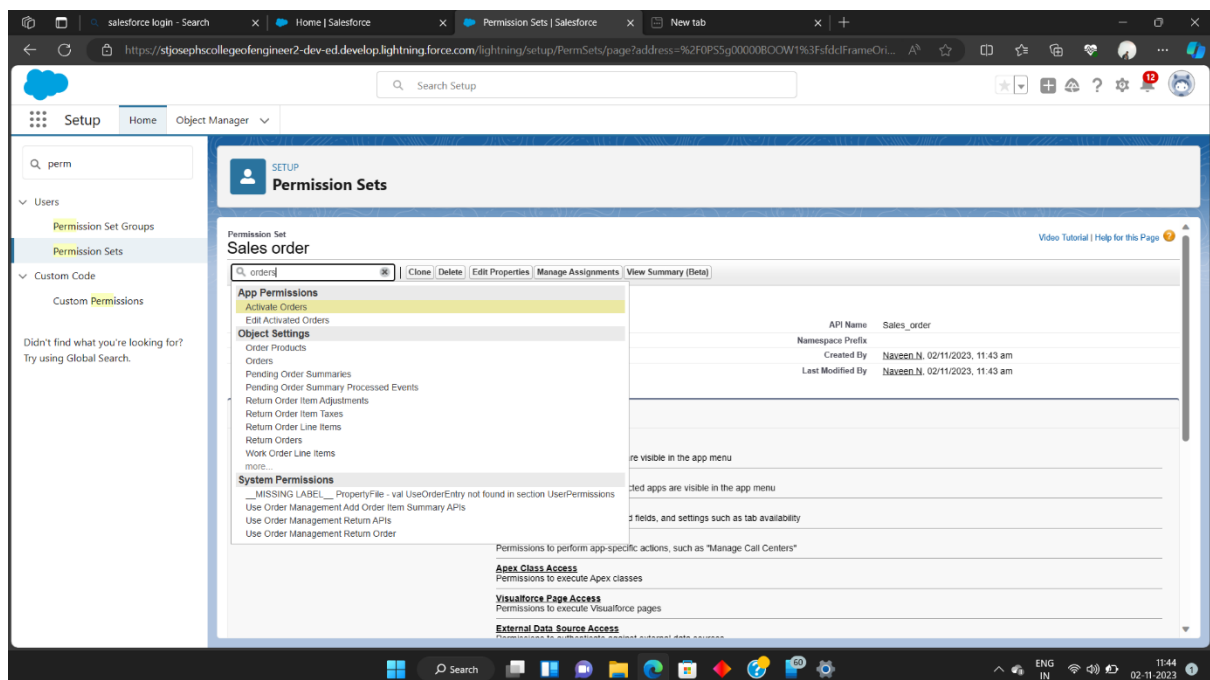
From Setup, in Quick Find type Permission Sets and select **Permission Sets**.

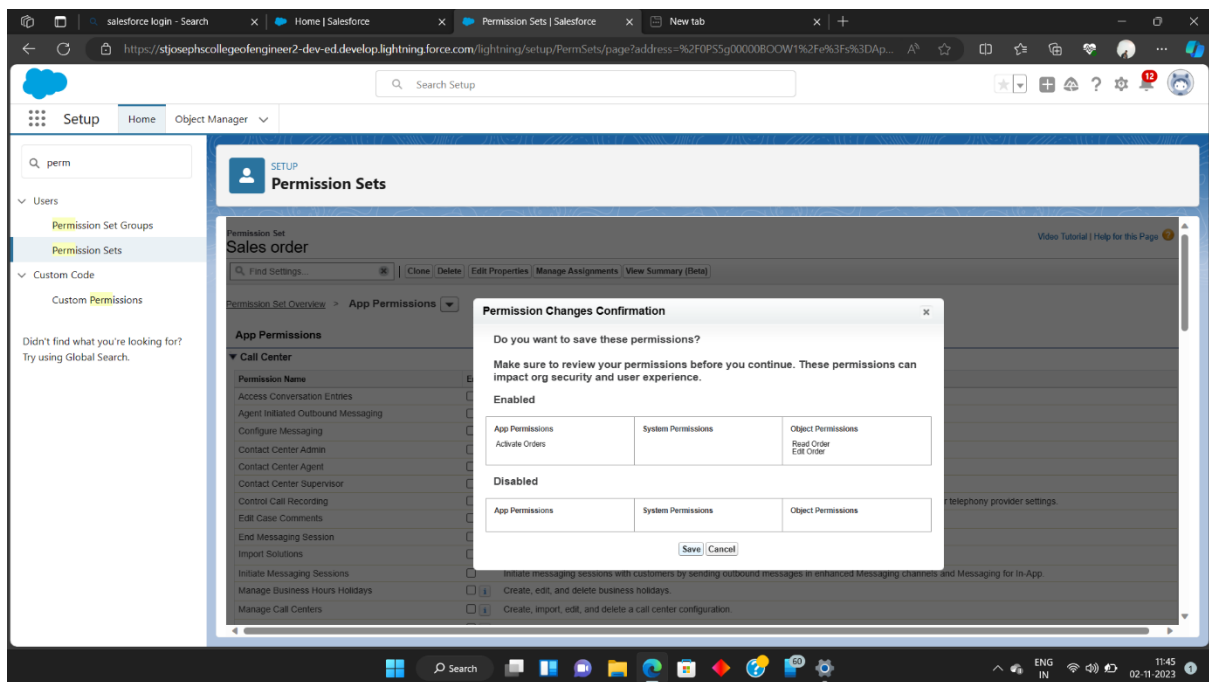
Click New.

For Label, enter Sales Orders.

For License, keep None.

Save the permission set.





Add permission to activate orders.

In the Find Setting...box, type Orders and then click Activate Orders.

On the App Permissions page, click Edit.

Scroll to the Sales section and enable Active Orders.

Save the permission set. A Permission Changes Confirmation box opens.

Notice that both Read Order and Edit because Order Activation depends on being able to read and edit orders.

Save your changes.

Add permission to create and delete orders.

In the Find Settings...box, type orders and then click Orders.

On the Object setting page for Orders, click Edit.

Enable the Create and Delete object permissions.

Save your changes.

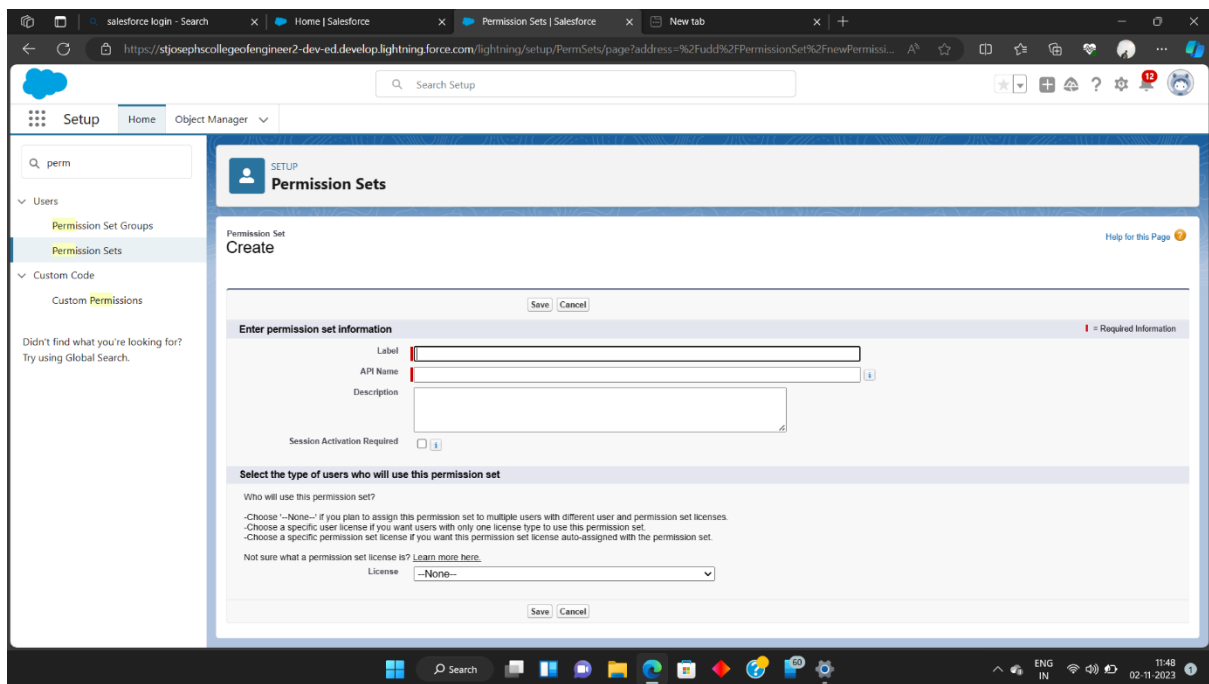
Create the permission set for contracts.

Navigate to the main Permission Sets Setup page. Click New.

For Label, enter Sales Contracts.

For License, keep None.

Save the permission set.



Navigate to the main permission Sets Setup page. Click New.

For Label, enter Sales contracts.

For license, keep None.

Save the permission set.

Add permission to read, create, edit, and delete contracts.

In the Find settings...box, type contracts and then click Contracts.

On the Object settings page for Contracts, click Edit.

Enable the Read, Create, Edit, and Delete object permission.

Save your changes.

salesforce login - Search x Home | Salesforce x Permission Sets | Salesforce x New tab

https://stjosephcollegeofengineer2-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P5Sg00000B0OW1%3Fo%3DOrder%...

Setup Home Object Manager

perm

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

Didn't find what you're looking for? Try using Global Search.

SETUP

### Permission Sets

Permission Set

#### Sales order

Find Settings... Clone Delete Edit Properties Manage Assignments View Summary (Beta)

Permission Set Overview > Object Settings Orders

Orders Edit

Object Permissions

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input checked="" type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input type="checkbox"/>

Field Permissions

Field Name	Field API Name	Read Access	Edit Access
Account Name	AccountId	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Number	AccountNumber	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Activated By	ActivatedById	<input type="checkbox"/>	<input type="checkbox"/>
Activated Date	ActivatedDate	<input type="checkbox"/>	<input type="checkbox"/>
Billing Address	BillingAddress	<input type="checkbox"/>	<input type="checkbox"/>
Billing Contact	BillingContactId	<input type="checkbox"/>	<input type="checkbox"/>

salesforce login - Search x Home | Salesforce x Permission Sets | Salesforce x New tab

https://stjosephcollegeofengineer2-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P5Sg00000B0OgH%3F%3DEnti...

Setup Home Object Manager

perm

Users

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Custom Permissions

Didn't find what you're looking for? Try using Global Search.

SETUP

### Permission Sets

Permission Set

#### Sales contracts

Find Settings... Clone Delete Edit Properties Manage Assignments View Summary (Beta)

Permission Set Overview > Object Settings Contracts

Contracts Save Cancel

Object Permissions

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input checked="" type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input type="checkbox"/>

Field Permissions

Field Name	Field API Name	Read Access	Edit Access
Account Name	AccountId	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Activated By	ActivatedById	<input type="checkbox"/>	<input type="checkbox"/>
Activated Date	ActivatedDate	<input type="checkbox"/>	<input type="checkbox"/>
Billing Address	BillingAddress	<input type="checkbox"/>	<input type="checkbox"/>
Company Started By	CompanySaportId	<input type="checkbox"/>	<input type="checkbox"/>

https://stjosephcollegeofengineer2-dev-ed.develop.my.salesforce.com/one-app#/alohaRedirect/0P5Sg00000B0OgH/e/1s=EntityPermissions&o=Contract&sdtp=p1