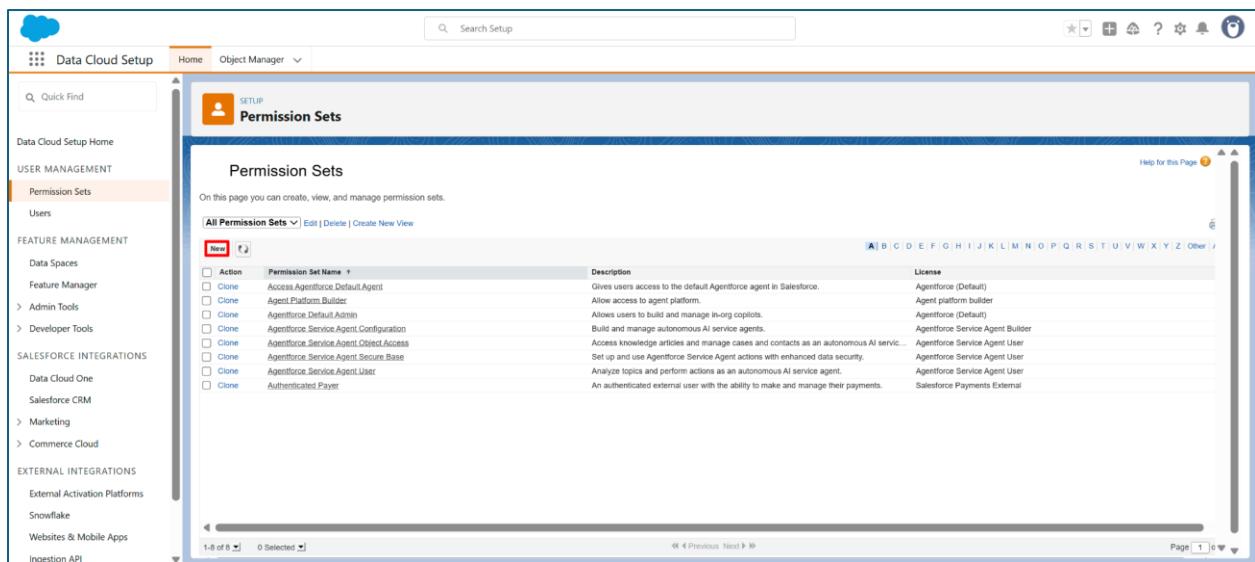


Lab Exercise 2 – Permission Set

Step 5: Create a Permission Set

1. Go to **Setup → Permission Sets → New.**



The screenshot shows the Salesforce Setup interface for managing Permission Sets. The left sidebar navigation includes sections like Data Cloud Setup Home, USER MANAGEMENT (with 'Permission Sets' selected), FEATURE MANAGEMENT, SALESFORCE INTEGRATIONS, and EXTERNAL INTEGRATIONS. The main content area is titled 'Permission Sets' and contains a table listing various permission sets. A red box highlights the 'New' button at the top left of the table. The table columns include 'Action', 'Permission Set Name', 'Description', and 'License'. The first few rows listed are:

Action	Permission Set Name	Description	License
<input type="checkbox"/>	Access Agentforce.Default.Agent	Gives users access to the default Agentforce agent in Salesforce.	Agentforce (Default)
<input type="checkbox"/>	Agent.Platform.Builder	Allow access to agent platform.	Agent platform builder
<input type="checkbox"/>	Agentforce.Default.Admin	Allows users to build and manage in-page copilot.	Agentforce (Default)
<input type="checkbox"/>	Agentforce.Service.Agent.Configuration	Build and manage autonomous AI service agents.	Agentforce Service Agent Builder
<input type="checkbox"/>	Agentforce.Service.Agent.Object.Access	Access knowledge articles and manage cases and contacts as an autonomous AI service.	Agentforce Service Agent User
<input type="checkbox"/>	Agentforce.Service.Agent.Secure.Base	Set up and use Agentforce Service Agent actions with enhanced data security.	Agentforce Service Agent User
<input type="checkbox"/>	Agentforce.Service.Agent.User	Analyze topics and perform actions as an autonomous AI service agent.	Agentforce Service Agent User
<input type="checkbox"/>	Authenticated.Payer	An authenticated external user with the ability to make and manage their payments.	Salesforce Payments External

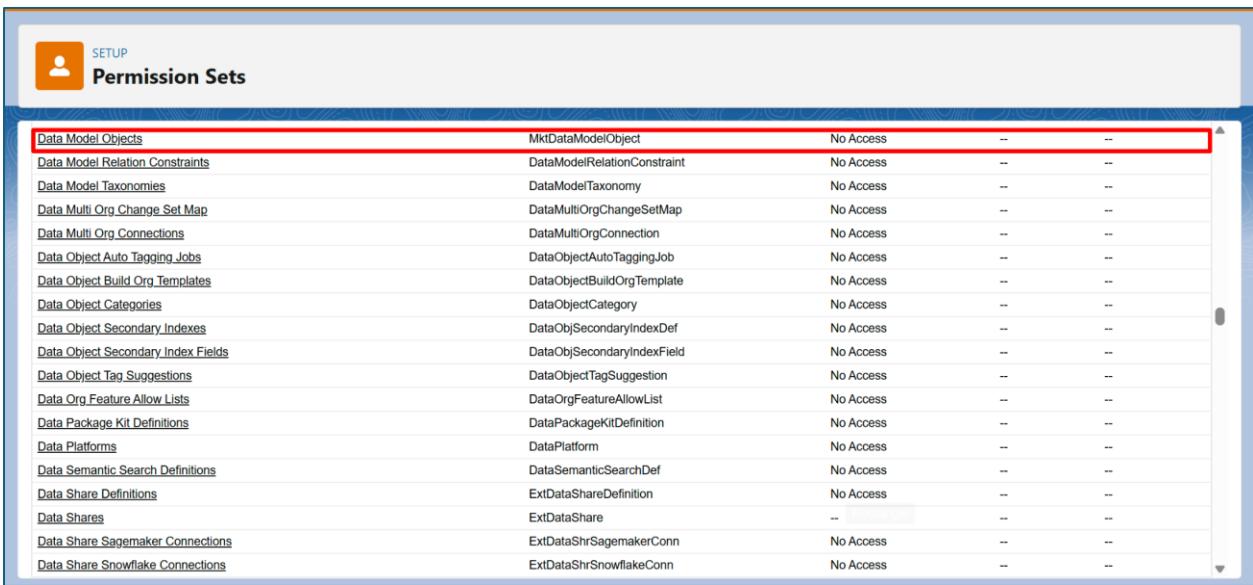
2. Enter the label '**Data Cloud Learner**' , API name '**Data_Cloud_Learner**' and description '**Minimal access**' save.

3.

4. Assigning Minimal Access. You should look for and assign **Read** access to following key Data Cloud objects.

- Data Streams
- Data Models Object
- Data Lake Object
- Segments
- Individuals

- **Find the Object:** On the **Object Settings** page



Data Model Objects	MktDataModelObject	No Access	--	--
Data Model Relation Constraints	DataModelRelationConstraint	No Access	--	--
Data Model Taxonomies	DataModelTaxonomy	No Access	--	--
Data Multi Org Change Set Map	DataMultiOrgChangeSetMap	No Access	--	--
Data Multi Org Connections	DataMultiOrgConnection	No Access	--	--
Data Object Auto Tagging Jobs	DataObjectAutoTaggingJob	No Access	--	--
Data Object Build Org Templates	DataObjectBuildOrgTemplate	No Access	--	--
Data Object Categories	DataObjectCategory	No Access	--	--
Data Object Secondary Indexes	DataObjSecondaryIndexDef	No Access	--	--
Data Object Secondary Index Fields	DataObjSecondaryIndexField	No Access	--	--
Data Object Tag Suggestions	DataObjectTagSuggestion	No Access	--	--
Data Org Feature Allow Lists	DataOrgFeatureAllowList	No Access	--	--
Data Package Kit Definitions	DataPackageKitDefinition	No Access	--	--
Data Platforms	DataPlatform	No Access	--	--
Data Semantic Search Definitions	DataSemanticSearchDef	No Access	--	--
Data Share Definitions	ExtDataShareDefinition	No Access	--	--
Data Shares	ExtDataShare	--	--	--
Data Share Sagemaker Connections	ExtDataShrSagemakerConn	No Access	--	--
Data Share Snowflake Connections	ExtDataShrSnowflakeConn	No Access	--	--

- Click to Edit

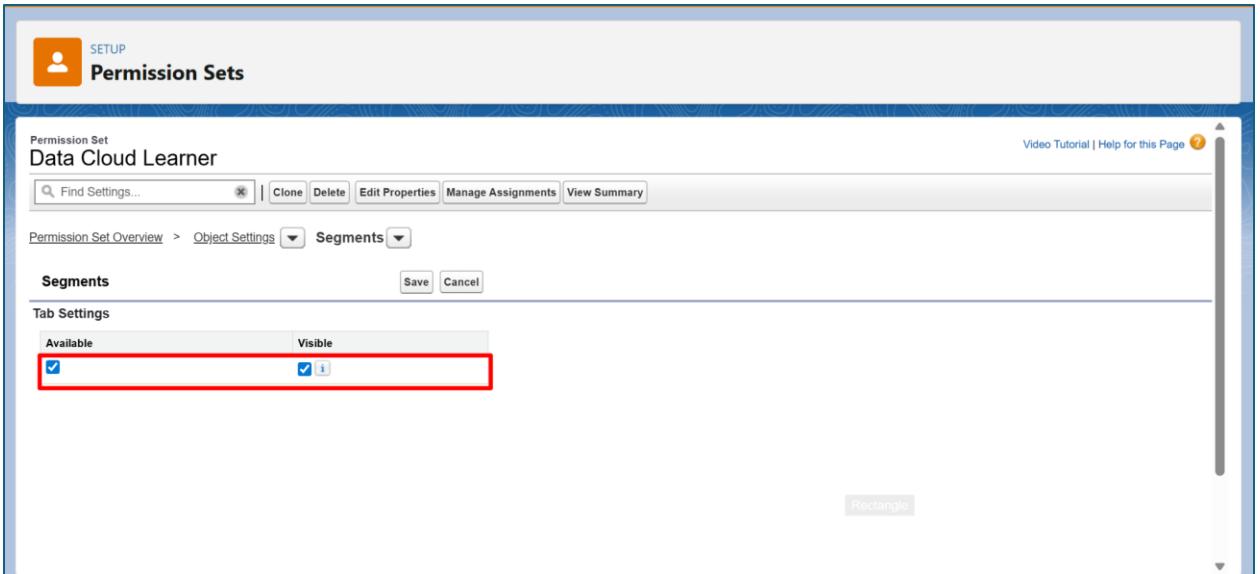
The screenshot shows the Salesforce Data Cloud Setup interface. On the left, there's a sidebar with categories like USER MANAGEMENT, FEATURE MANAGEMENT, and SALESFORCE INTEGRATIONS. The 'Permission Sets' section is highlighted. The main area is titled 'Permission Sets' and shows a 'Data Cloud Learner' permission set. It has tabs for 'Object Settings' and 'Data Model Objects'. Under 'Data Model Objects', there's a table of object permissions. The 'Read' permission is checked under the 'Enabled' column. There are also buttons for 'Clone', 'Delete', 'Edit Properties', 'Manage Assignments', and 'View Summary'.

- Under **Object Permissions**, check **Read** and Click **Save**.

This screenshot shows the 'Data Model Objects' edit screen for the 'Data Cloud Learner' permission set. The 'Read' permission is highlighted with a red box. The 'Save' button is also highlighted with a red box. Other permissions listed include Create, Edit, Delete, View All Records, Modify All Records, and View All Fields. The 'Enabled' column for 'Read' has a checked checkbox.

- Like the above Data Object Enable **Read** permission to other objects.

Note: In the **Segments** object under the **Tab Settings** section, check the **Visible** box for **Available** (you may only see one checkbox) and Click **Save**.



5. In **System Permissions**, enable minimal access:
6. Assign this Permission Set to your user.

Step 6: Review and Compare Access

- Open your **User record** (Setup → Users →Users → [Your Name]).

The screenshot shows the Salesforce Setup interface. The left sidebar includes sections for Data Spaces, Feature Manager, Admin Tools, Developer Tools, SALESFORCE INTEGRATIONS (Data Cloud One, Salesforce CRM, Marketing, Commerce Cloud), EXTERNAL INTEGRATIONS (External Activation Platforms, Snowflake, Websites & Mobile Apps, Ingestion API, Other Connectors, Private Connect), and Optimizer.

The main content area displays the "Permission Sets" screen for the "Data Cloud Learner" permission set. The "Object Settings" table lists various objects and their permissions:

Object Name	Object API Name	Object Permissions	Total Fields	Tab Settings
Accounts	Account	No Access	40	--
Activation Attribute	MktSgtActvAudAttrDef	No Access	--	--
Activation Contact Point	MktSgtActvCtcPDef	No Access	--	--
Activation Contact Point Field	MktSgtActvCtcPfPkDef	No Access	--	--
Activation Contact Point Source	MktSgtActvCtcPtSrcDef	No Access	--	--
Activation Data Model Field	MktSgtActvDataModFDef	No Access	--	--
Activation Data Source	MktSgmtActvDataSourceDef	No Access	--	--
Activation Definition	MarketSegmentActivationDef	No Access	--	--
Activation Platform Activation Attributes	ActivationPlatformActvAttr	No Access	--	--
Activation Platform Audience Identifiers	ActvPlatformAdnclIdentifier	No Access	--	--
Activation Platform Data Connector for S3	ActvPfrmDataConnectorS3	No Access	--	--

The screenshot shows the Salesforce Setup interface. The left sidebar includes sections for Sales Cloud Everywhere, ADMINISTRATION (with "Users" highlighted), and Optimizer.

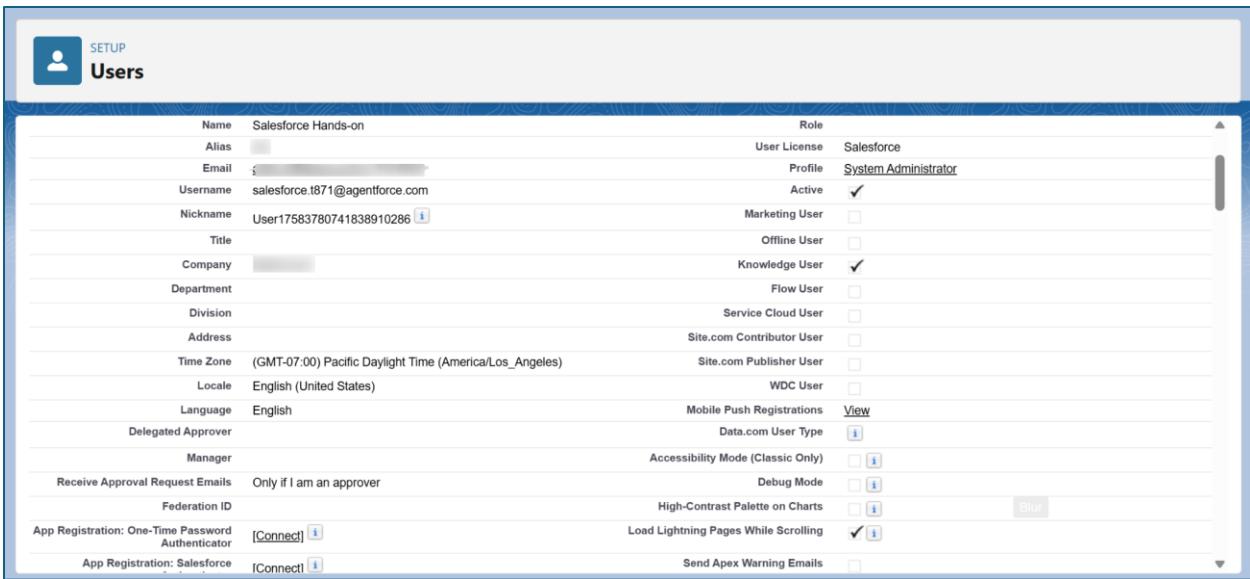
The main content area displays the "Home" screen. The "Users" link in the sidebar is highlighted with a red box. The screen features three cards: "Data Cloud" (Watch Video, Let's Go), "Get Started with Einstein Bots" (Get Started), and "Mobile Publisher" (Learn More).

The screenshot shows the Salesforce Users interface. The top navigation bar includes links for Help for this Page, New User, Reset Password(s), and Add Multiple Users.

The main content area displays the "All Users" list. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. A user named "Hands-on_Salesforce" is highlighted with a red box. The table footer includes links for New User, Reset Password(s), and Add Multiple Users.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Expert	Chatter	chatty_000dg00000bsjyhuaz.ykv7vq4gehza@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	EPIC_OrgFarm	OEPIC	epic.d80f607bcba5@orgfarm.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Hands-on_Salesforce	adi	salesforce.t871@agentforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	User_Integration	integ	integration@00dg00000bsjyhuaz.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightssecurity@00dg00000bsjyhuaz.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security User

- What your **Profile** provides



The screenshot shows the Salesforce Setup interface under the 'Users' section. It displays a detailed view of a user's profile settings across various tabs. The visible tabs include:

- General**: Shows basic information like Name (Salesforce Hands-on), Alias, Email, Username (salesforce.t871@agentforce.com), Nickname (User17583780741838910286), Title, Company, Department, Division, Address, Time Zone (GMT-07:00 Pacific Daylight Time (America/Los_Angeles)), Locale (English (United States)), Language (English), Delegated Approver, Manager, Receive Approval Request Emails (Only if I am an approver), Federation ID, App Registration: One-Time Password Authenticator (iConnect!), and App Registration: Salesforce (iConnect!).
- Role**: Shows User License (Salesforce), Profile (System Administrator), Active (checked), Marketing User (unchecked), Offline User (unchecked), Knowledge User (checked), Flow User (unchecked), Service Cloud User (unchecked), Site.com Contributor User (unchecked), Site.com Publisher User (unchecked), WDC User (unchecked), Mobile Push Registrations (View), Data.com User Type (i), Accessibility Mode (Classic Only) (unchecked), Debug Mode (unchecked), High-Contrast Palette on Charts (unchecked), Load Lightning Pages While Scrolling (checked), and Send Apex Warning Emails (unchecked).

What the **Permission Set** adds.