

# Lab Exercise 2 – Permission Set

## Step 5: Create a Permission Set

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

The screenshot displays the Salesforce Setup interface. The left sidebar contains a navigation menu with categories like Data Cloud Setup, User Management, Feature Management, Salesforce Integrations, and External Integrations. The main content area is titled 'Permission Sets' and includes a table of existing permission sets. The table has columns for Action, Permission Set Name, Description, and License. The 'All Permission Sets' dropdown is set to 'All'. The table lists several permission sets, including 'Access Agentforce Default Agent', 'Agent Platform Builder', 'Agentforce Default Admin', 'Agentforce Service Agent Configuration', 'Agentforce Service Agent Object Access', 'Agentforce Service Agent Secure Base', 'Agentforce Service Agent User', and 'Authenticated Payer'.

Action	Permission Set Name	Description	License
<a href="#">Clone</a>	Access Agentforce Default Agent	Gives users access to the default Agentforce agent in Salesforce.	Agentforce (Default)
<a href="#">Clone</a>	Agent Platform Builder	Allow access to agent platform.	Agent platform builder
<a href="#">Clone</a>	Agentforce Default Admin	Allows users to build and manage in-org copilot.	Agentforce (Default)
<a href="#">Clone</a>	Agentforce Service Agent Configuration	Build and manage autonomous AI service agents.	Agentforce Service Agent Builder
<a href="#">Clone</a>	Agentforce Service Agent Object Access	Access knowledge articles and manage cases and contacts as an autonomous AI service agent.	Agentforce Service Agent User
<a href="#">Clone</a>	Agentforce Service Agent Secure Base	Set up and use Agentforce Service Agent actions with enhanced data security.	Agentforce Service Agent User
<a href="#">Clone</a>	Agentforce Service Agent User	Analyze topics and perform actions as an autonomous AI service agent.	Agentforce Service Agent User
<a href="#">Clone</a>	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.

The screenshot shows the 'Permission Sets' page in Salesforce Setup. The 'Create' button is highlighted. Below it, the 'Enter permission set information' section contains the following fields:

- Label: Data Cloud Learner
- API Name: Data\_Cloud\_Learner
- Description: Minimal access
- Session Activation Required: ☐

Below this section, the 'Select the type of users who will use this permission set' section is visible, showing a dropdown menu for 'License' set to '--None--'.

3.

The screenshot shows the 'Data Cloud Learner' permission set details page. The 'Permission Set Overview' section displays the following information:


Field	Value
Description	Minimal access
License	--None--
Session Activation Required	<input type="checkbox"/>
Permission Set Groups Added To	0
API Name	Data_Cloud_Learner
Namespace Prefix	
Created By	Aditya Tripathi, 10/2/2025, 2:54 PM
Last Modified By	Aditya Tripathi, 10/2/2025, 2:54 PM

Below the overview, the 'Apps' section is visible, showing a list of permissions. The 'Object Settings' section is highlighted with a red box, indicating the permissions to access objects and fields, and settings such as tab availability.

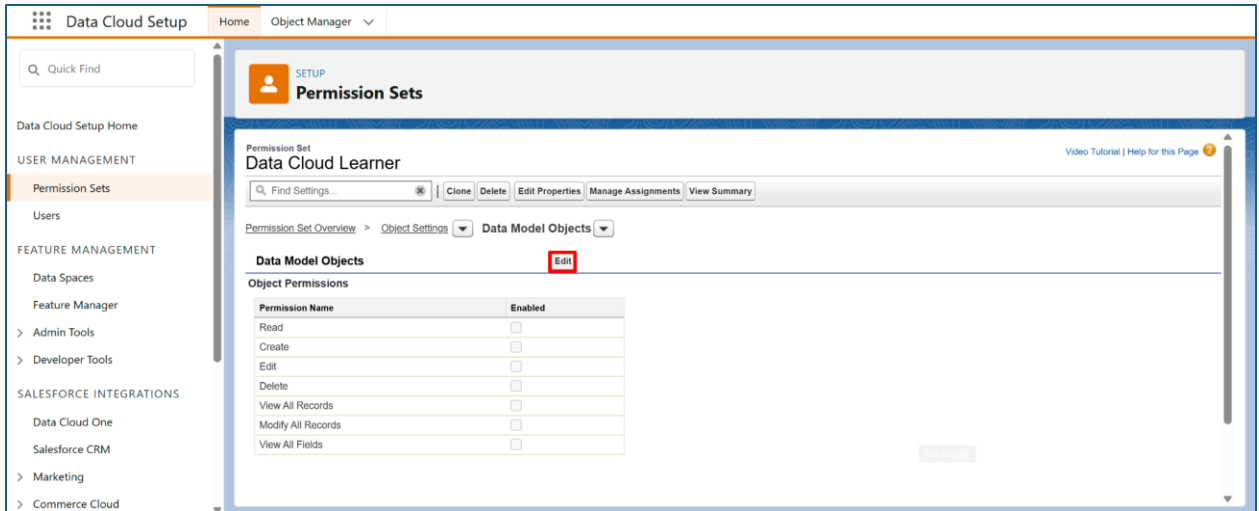
4. Assigning Minimal Access. You should look for and assign **Read** access to following key Data Cloud objects.

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

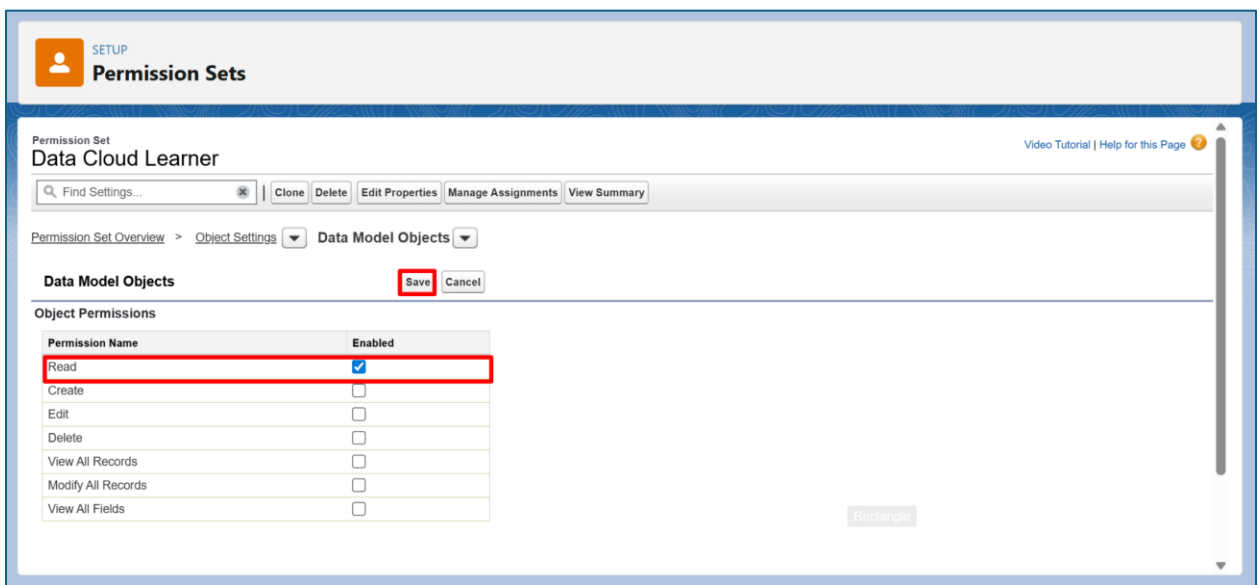
- **Find the Object:** On the **Object Settings** page

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

- Click to **Edit**

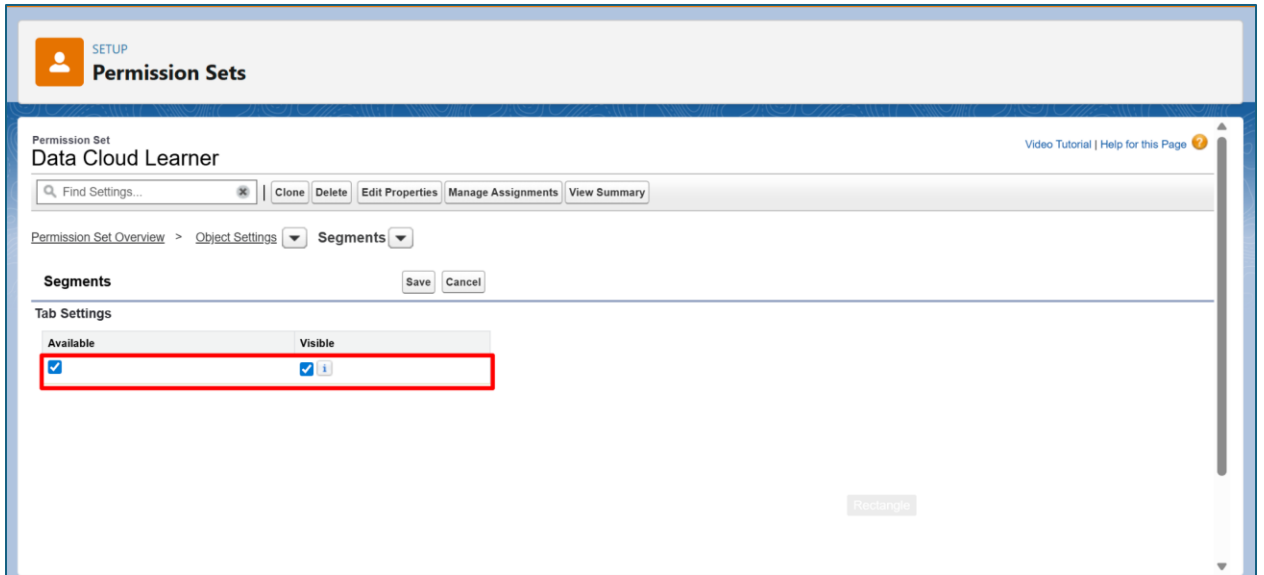


- Under **Object Permissions**, check **Read** and Click **Save**.



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

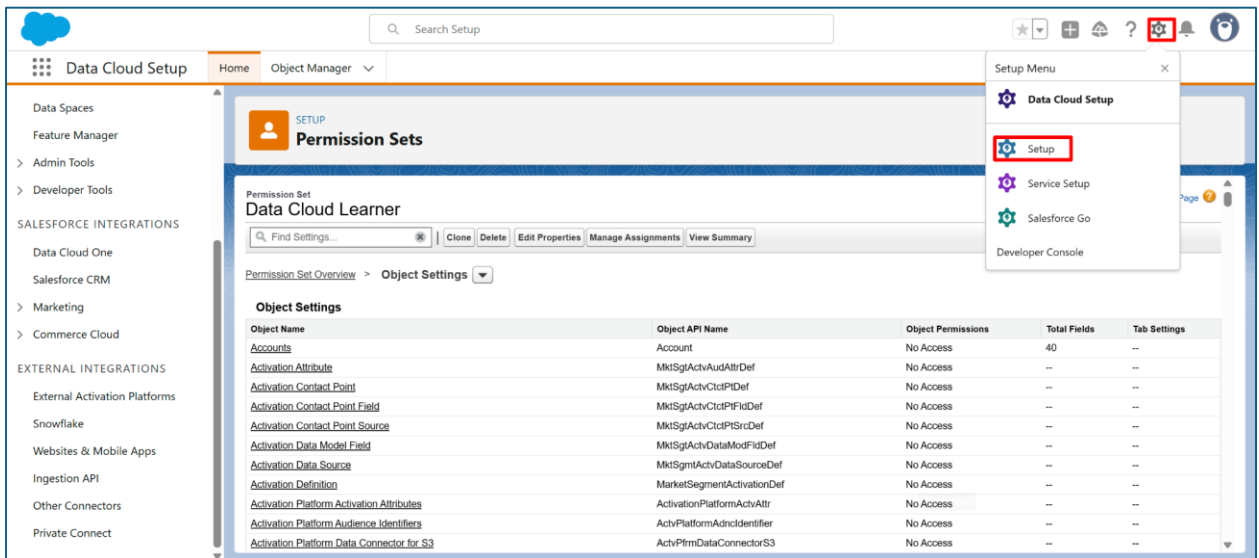
**Note:** In the **Segments** object under the **Tab Settings** section, check the **Visible** box for **Available** (you may only see one checkbox) and Click **Save**.



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

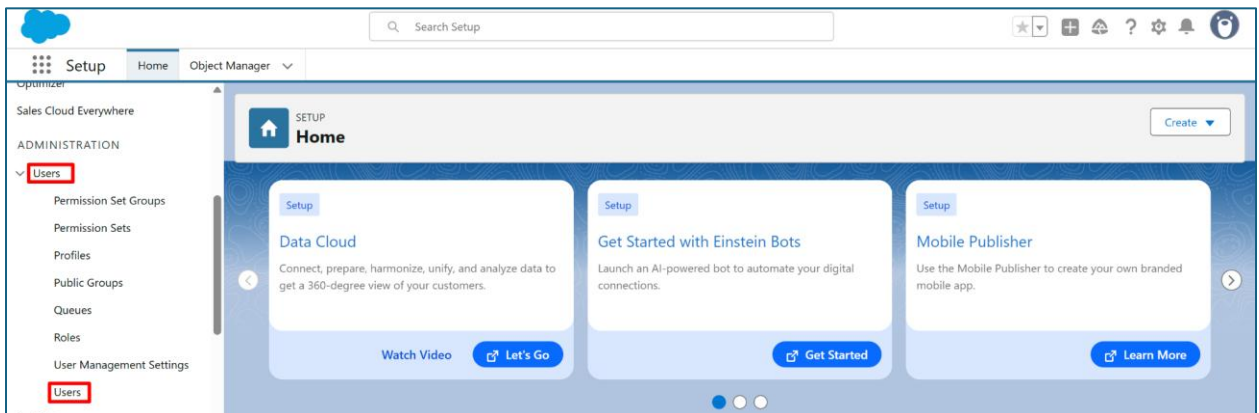
## Step 6: Review and Compare Access

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

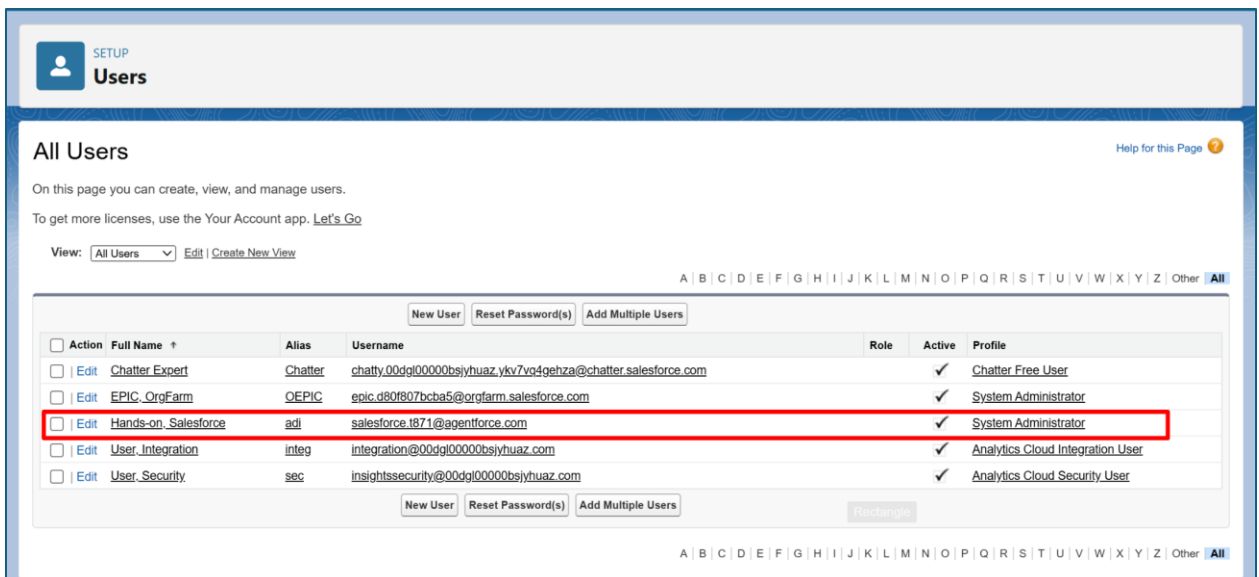


The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation options like Data Spaces, Feature Manager, Admin Tools, Developer Tools, and various integrations. The main content area is titled 'Permission Sets' and shows a table of object settings for the 'Data Cloud Learner' permission set. The 'Setup' menu is open in the top right corner, and the 'Setup' option is highlighted with a red box.

Object Name	Object API Name	Object Permissions	Total Fields	Tab Settings
Accounts	Account	No Access	40	--
Activation Attribute	MktSgtActvAudAltrDef	No Access	--	--
Activation Contact Point	MktSgtActvCtctPIDef	No Access	--	--
Activation Contact Point Field	MktSgtActvCtctPIFidDef	No Access	--	--
Activation Contact Point Source	MktSgtActvCtctPISrcDef	No Access	--	--
Activation Data Model Field	MktSgtActvDataModFidDef	No Access	--	--
Activation Data Source	MktSgtActvDataSourceDef	No Access	--	--
Activation Definition	MarketSegmentActivationDef	No Access	--	--
Activation Platform Activation Attributes	ActivationPlatformActvAltr	No Access	--	--
Activation Platform Audience Identifiers	ActvPlatformAudncIdentifier	No Access	--	--
Activation Platform Data Connector for S3	ActvPlfmDataConnectorS3	No Access	--	--



The screenshot shows the Salesforce Setup interface with the 'Users' section selected. The left sidebar has 'Users' highlighted with a red box. The main content area displays a 'Home' dashboard with cards for 'Data Cloud', 'Get Started with Einstein Bots', and 'Mobile Publisher'. The 'Users' option in the left sidebar is highlighted with a red box.



The screenshot shows the Salesforce 'All Users' page. The page title is 'All Users' and it includes a description: 'On this page you can create, view, and manage users. To get more licenses, use the Your Account app. Let's Go'. Below the description is a table of users. The 'Hands-on Salesforce' user is highlighted with a red box.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00dgl00000bsiyhuaz_ykv7vp4gehza@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	EPIC_QrgFarm	OEPIQ	epic.d80f807bcha5@qrgfarm.salesforce.com		✓	System Administrator
<input type="checkbox"/> Edit	Hands-on Salesforce	adi	salesforce.1871@agentforce.com		✓	System Administrator
<input type="checkbox"/> Edit	User Integration	integ	integration@00dgl00000bsiyhuaz.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00dgl00000bsiyhuaz.com		✓	Analytics Cloud Security User

- What your **Profile** provides

SETUP

Users

Name	Salesforce Hands-on	Role	
Alias		User License	Salesforce
Email		Profile	<a href="#">System Administrator</a>
Username	salesforce.1871@agentforce.com	Active	<input checked="" type="checkbox"/>
Nickname	User17583780741838910286 ⓘ	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input checked="" type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (United States)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<a href="#">View</a>
Delegated Approver		Data.com User Type	ⓘ
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> ⓘ
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> ⓘ
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> ⓘ <span>Blue</span>
App Registration: One-Time Password Authenticator	<a href="#">[Connect]</a> ⓘ	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/> ⓘ
App Registration: Salesforce	<a href="#">[Connect]</a> ⓘ	Send Apex Warning Emails	<input type="checkbox"/>

What the **Permission Set** adds.