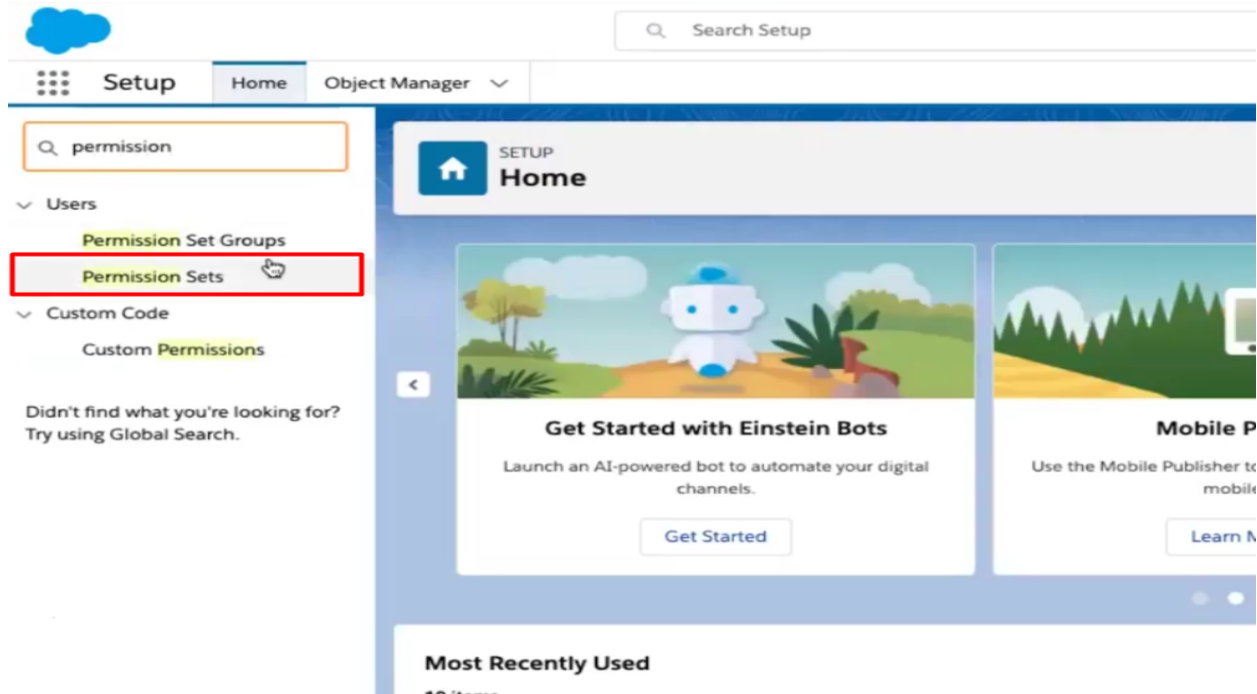
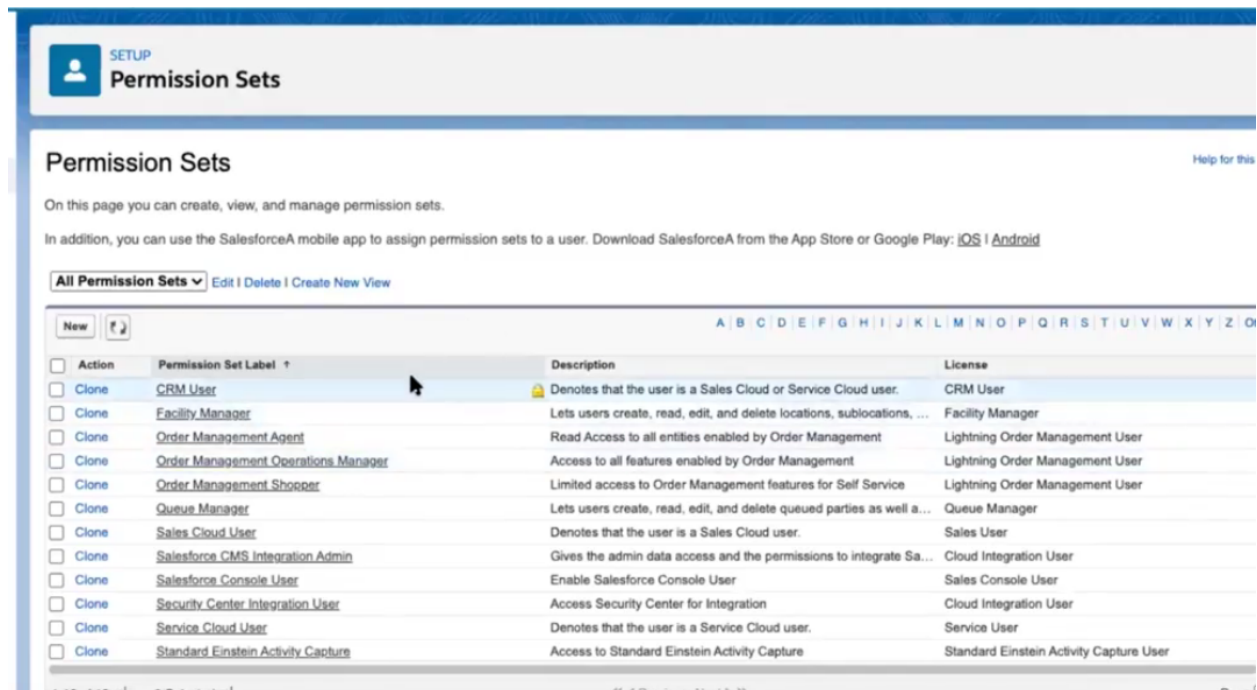


Lecture 2: Adding Permission to Users via Permission Set:

Step 1: First step is to log in with the admin account as admin can only create permission. After that in the quick search option search for permissions sets and click to open.



Step 2: After opening the permission set on the next page you will see the list of existing permission sets.



Step 3: In order to create a new permission set click on new, here I am putting label as my permission set API name will be generated by default you can also put a description as required and after this I am clicking on save.

up Home Object Manager

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Permission Set Groups

Permission Sets

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n Permissions

hat you're looking for?
bal Search.

SETUP
Permission Sets

Permission Set
Create

Save Cancel

Enter permission set information

Label My Permission Set

API Name My_Permission_Set

Description

Session Activation Required ☐

Select the type of users who will use this permission set

Who will use this permission set?

-Choose "--None--" if you plan to assign this permission set to multiple users with different user and permission set licenses.
-Choose a specific user license if you want users with only one license type to use this permission set.
-Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

Not sure what a permission set license is? [Learn more here.](#)

License --None--

Step 4: Now if you open the account object and click on edit and enable all the checkboxes and save it will be applied to all the users associated with this permission.

My Permission Set

Find Settings... Clone Delete Edit Properties Manage Assignments

Permission Set Overview > Object Settings Accounts

Accounts Save Cancel

Account: Record Type Assignments

Record Types	Assigned Record Types
Business Account	<input type="checkbox"/>
Individual Account	<input type="checkbox"/>

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

Step 5: After enabling these permissions we now need to manage the permission sets so I am clicking on manage assignments.

The screenshot shows the 'Manage Assignments' page for a permission set named 'My Permission Set'. The page has a top navigation bar with 'SETUP' and 'Permission Sets'. Below the header, there's a search bar and buttons for 'Clone', 'Delete', 'Edit Properties', and 'Manage Assignments' (which is highlighted with a red box). The main content area is divided into two sections: 'Accounts' and 'Object Permissions'. The 'Accounts' section shows a table of 'Record Types' with 'Assigned Record Types' checkboxes. The 'Object Permissions' section shows a table of 'Permission Name' with 'Enabled' checkboxes.

Permission Set
My Permission Set

Find Settings... Clone Delete Edit Properties **Manage Assignments**

Permission Set Overview > Object Settings Accounts

Accounts Edit

Account: Record Type Assignments

Record Types	Assigned Record Types
Business Account	<input type="checkbox"/>
Individual Account	<input type="checkbox"/>

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"/>

Step 6: After that click on add assignments and select the user you want to assign the permission to. So here I am selecting the test user and clicking on assign.

The screenshot shows the 'Assign Users' page for the 'My Permission Set'. The page has a top navigation bar with 'SETUP' and 'Permission Sets'. Below the header, there's a search bar and buttons for 'Clone', 'Delete', 'Edit Properties', and 'Manage Assignments'. The main content area is divided into two sections: 'Accounts' and 'Object Permissions'. The 'Accounts' section shows a table of 'Record Types' with 'Assigned Record Types' checkboxes. The 'Object Permissions' section shows a table of 'Permission Name' with 'Enabled' checkboxes.

Assign Users
All Users


View: All Users Edit Create New View

Assign Cancel

Action	Full Name	Alias	Username
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d5g0000004i89deaq_e11evyfj2ko5@chatter.salesforce.com
<input type="checkbox"/> Edit	User Admin	AUser	sfdcconfigurations@gmail.com
<input type="checkbox"/> Edit	User Integration	integ	integration@00d5g0000004i89deaq.com
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00d5g0000004i89deaq.com
<input checked="" type="checkbox"/> Edit Login	User Test	tuser	sfconfigimplementtestuser@gmail.com

Assign Cancel

Step 7: Now if we go to users and open the record and scroll down you will see the permission is assigned and is visible.

 **SETUP**
Users

[Edit](#) [Sharing](#) [Reset Password](#) [Login](#) [Freeze](#)

Permission Set Assignments [Edit Assignments](#)

Action	Permission Set Label	Date Assigned
Del	My Permission Set	5/23/2021

Permission Set Assignments: Activation Required [Edit Assignments](#)
No records to display

Permission Set Group Assignments [Edit Assignments](#)
No records to display

Permission Set License Assignments [Edit Assignments](#)
No records to display

Personal Groups [New Group](#)
No personal groups specified