# Data 360 Permission Set Transition Guide

Salesforce, November ’25

📝**Note**: *As of October 14, 2025, Data Cloud has been rebranded to Data 360. During this transition, you may see references to Data Cloud in our application and documentation. While the name is new, the functionality and content remains unchanged.*

@asksalesforce

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# Best Practices for Orgs with Multiple Data Spaces

## Use Shell Permission Sets to Manage Data Spaces

If your org uses multiple data spaces, you can simplify Data 360 administration by using a combination of role-based standard permission sets and data space-specific permission sets. If you use shell permission sets, you don't have to manually update permission sets when changes are made in Data 360.

Permission sets are stackable. Users are granted access based on the combination of all permission sets assigned to them. This functionality means that you don't need to clone your standard permission sets in order to grant more permissions to your users. Instead, combine multiple permission sets to create variations on standard access, such as access to specific data spaces.

In order to access a feature within a specific data space, each user needs to have two types of access:

1. At least View access to the feature's definition object
2. At least View access to the Feature Permissions in a specific data space

Standard Data 360 permission sets only grant access to feature definition objects.

You must also grant access to the feature in each specific data space you want the user to have access to.

**Example**

Suppose your org uses two data spaces, A and B, to separate data about your two brands. Some managers in your marketing department work only with brand A, some only with brand B, and a few with both A and B.

You could handle this situation by cloning the Data Cloud Activation Manager standard permission set three times.

| Standard Permission Set (assigned to users) | Cloned Permission Sets (assigned to users) | Access Granted by Cloned Permission Set |
|---|---|---|
| Data Cloud Activation Manager | Data Cloud Activation Manager with Brand A Data Space | Data Cloud Activation Manager in Data Space A |
| | Data Cloud Activation Manager with Brand B Data Space | Data Cloud Activation Manager in Data Space B |
| | Data Cloud Activation Manager with Brand A+B Data Spaces | Data Cloud Activation Manager in Data Space A+B |

If you use cloned standard permission sets to assign data space access in this way, you'll have to manually update your three cloned permission sets every time Data 360 updates standard permission sets.

You can use standard permission sets while also giving access only to certain data spaces. Give each user a standard permission set that fits their role, and one or more permission sets to give access to data spaces.

| Role-Based Standard Permission Set | Data Space-Specific Shell Permission Set | Cumulative Accesses |
|---|---|---|
| Data Cloud Activation Manager | Data Space A | Data Cloud Activation Manager in Data Space A |
| | Data Space B | Data Cloud Activation Manager in Data Space B |

With this combination of permission sets, you can flexibly grant access in 3 different combinations and avoid the need to update cloned permission sets.

- Data Cloud Activation Manager features in Data Space A
- Data Cloud Activation Manager features in Data Space B
- Data Cloud Activation Manager features in both Data Space A and Data Space B

## Grant Access to Data Spaces with Data Space-Specific Permission Sets

These empty permission sets work in combination with standard permission sets to assign access to specific data spaces.

1. Create a custom permission set.
2. Under Data Cloud Data Space Management, associate a data space to the permission set.
3. Click the data space name.
4. Click **Edit**.
5. Under Feature Permissions, select View and Customize for all features.
6. Click **Save**.

Don't add other permissions or associate other data spaces with the permission set. Assign the permission set to all users who should have access to the data space.

# Migrate Standard Permission Sets

## Create User Access Policies to Migrate Users

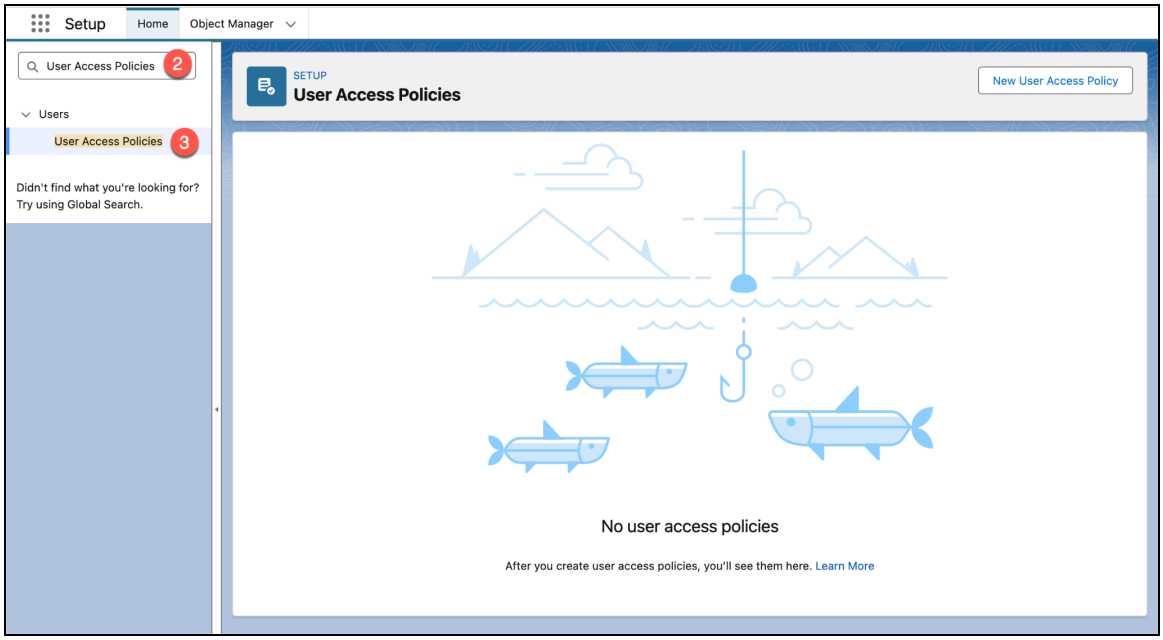
You can use user access policies to transition all users with a specific Data 360 permission set to a different permission set.

| User Permissions Needed | |
|---|---|
| To modify user access policies: | Manage User Access Policies |

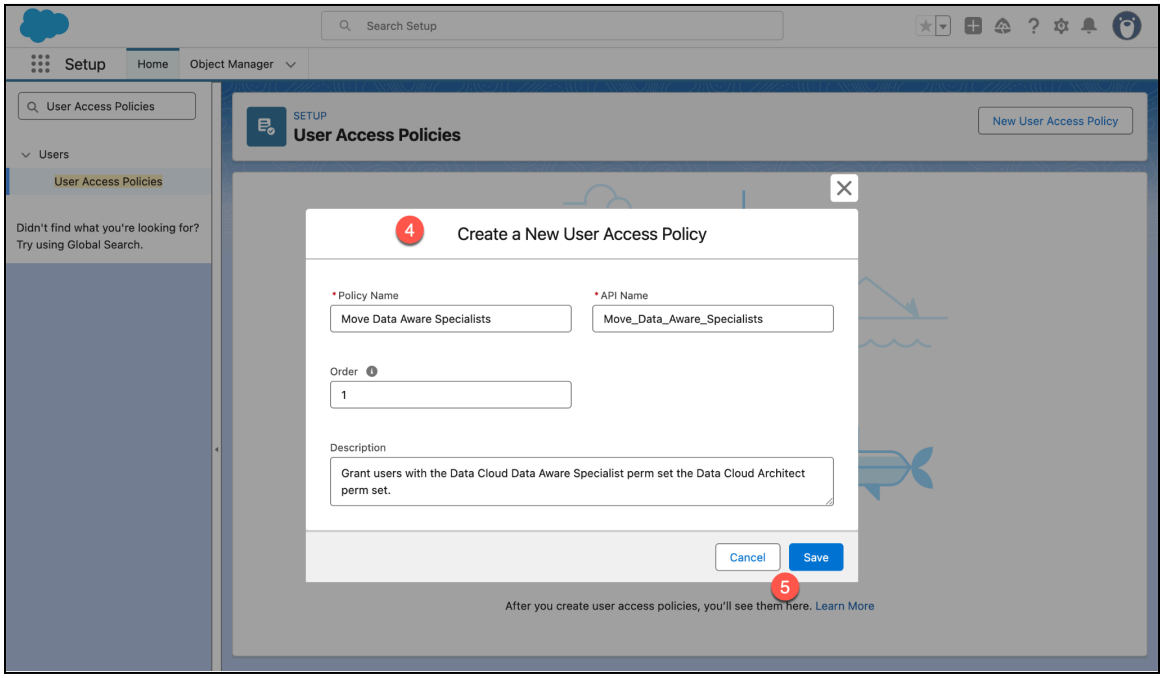
Follow these steps to migrate all users assigned to a specific permission set to a new permission set.

To migrate subsets of users, add additional criteria to define your subgroups.

1. From Setup, in the Quick Find box, enter User Management Settings, and then select User Management Settings. Make sure that both the User Access Policies and Enhanced Interface for User Access Policies settings are enabled.
2. In the Quick Find box, enter User Access Policies, and then select **User Access Policies**.
3. Click **New User Access Policy**.




4. Enter a value for the Policy Name and Description. The API Name auto-populates.
5. Click **Save**.

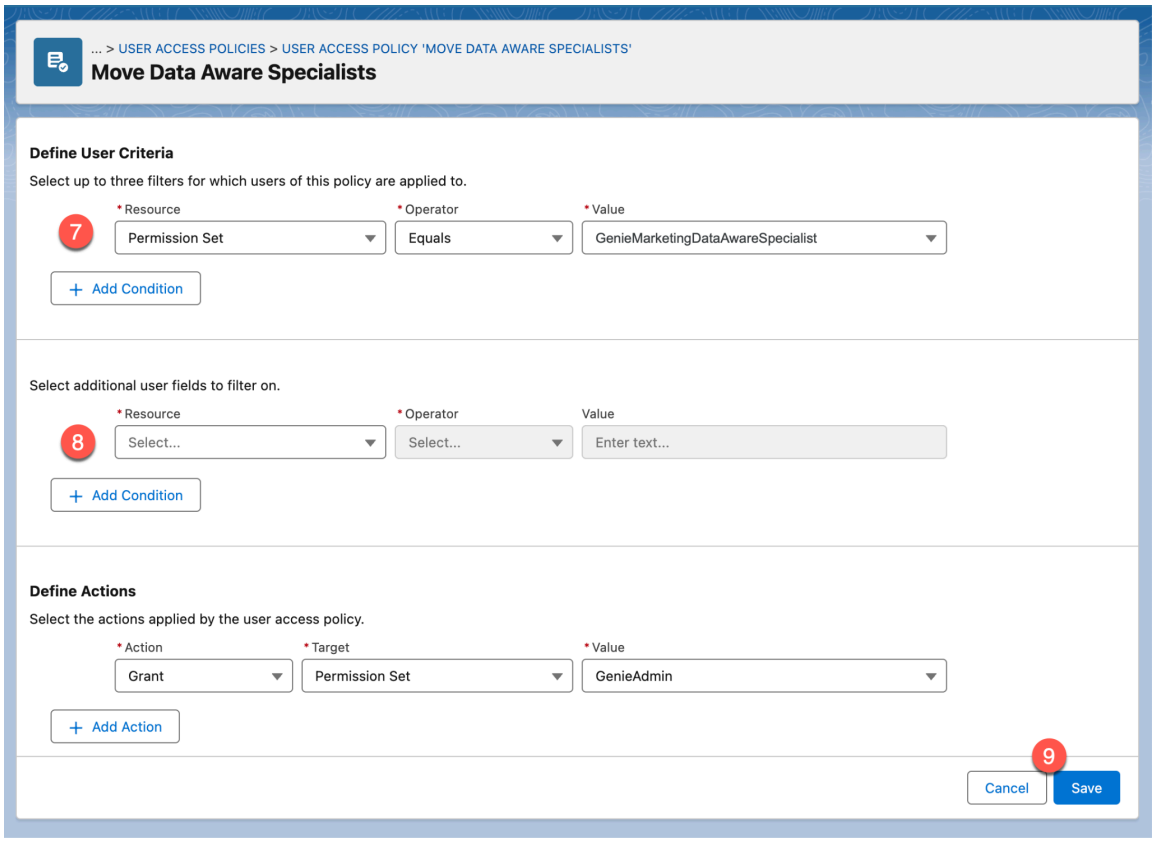



6. On the user access policy's detail page, click **Edit Criteria** to configure the policy's user criteria filters and actions.
7. Under Define User Criteria, select the following.
    a. For Resource, select Permission Set

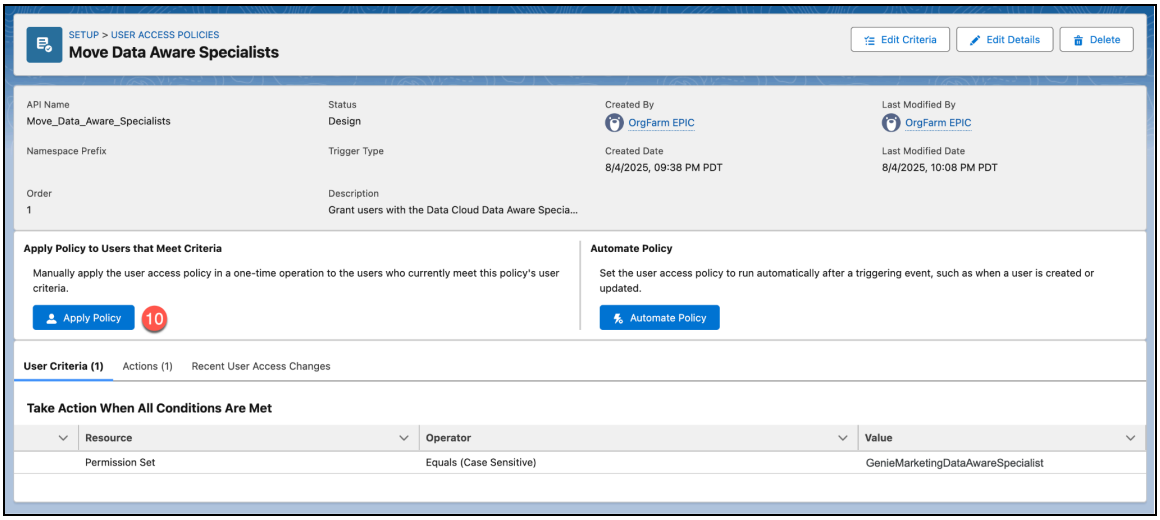
b. For Operator, select Equals
c. For Value, select the API name of the permission set users currently have.

8. Under Define Actions, select the following.
   a. For Action, select Grant
   b. For Target, select Permission Set
   c. For Value, select the API name of the permission set you want to grant to users.

9. Click **Save**.




10. Click **Apply Policy**. You can select a subset of users to apply the policy to, or click **Apply to All**.




To confirm that the users were granted access correctly, review their individual user records. On the policy's detail page under Recent User Access Changes, you can see when this policy was applied and the affected users.

After you've assigned new permission sets, use user access policies to revoke old perm sets.

# Reference Materials

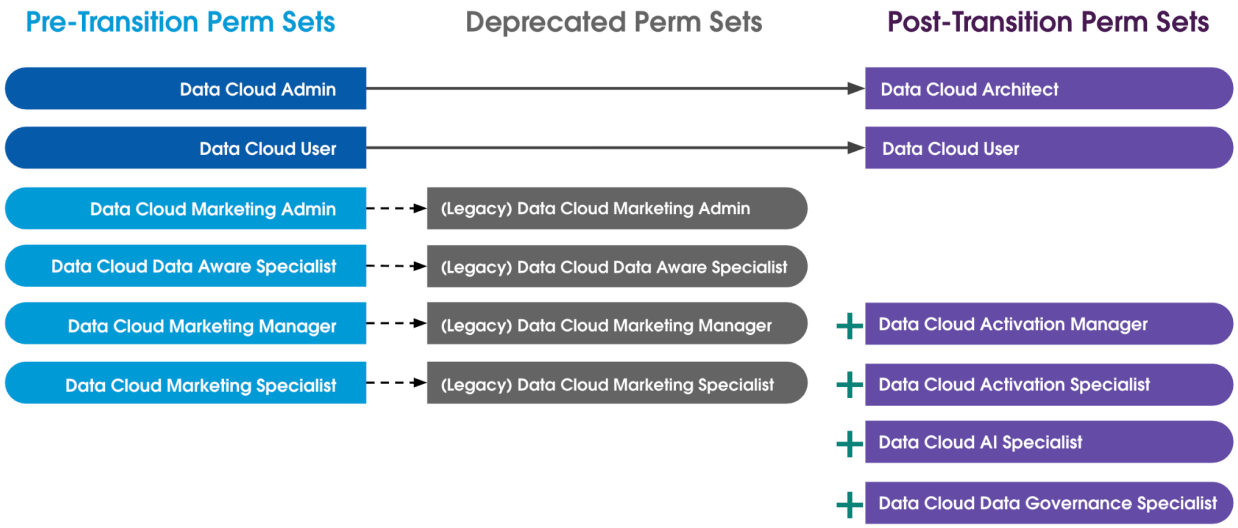
## Original, Changed, and New Permission Set Names

Most original permission sets will be deprecated or renamed on September 4.

The two new Data Cloud Activation Manager and Data Cloud Activation Specialist permission sets will become available on September 4.

The Data Cloud AI Specialist and Data Cloud Data Governance Specialist permission sets become available in November, 2025.

**Graphic**



**Accessible Table**

This table contains the same information as the graphic but is formatted for greater accessibility.

| Original Permission Set Name | | New Permission Set Name |
|---|---|---|
| Data Cloud Admin | → | Data Cloud Architect |
| Data Cloud Marketing Admin | → | (Legacy) Data Cloud Marketing Admin |
| Data Cloud Data Aware Specialist | → | (Legacy) Data Cloud Data Aware Specialist |
| Data Cloud Marketing Manager | → | (Legacy) Data Cloud Marketing Manager |
| | + | Data Cloud Activation Manager |
| Data Cloud Marketing Specialist | → | (Legacy) Data Cloud Marketing Specialist |
| | + | Data Cloud Activation Specialist |
| Data Cloud User | = | Data Cloud User |
| | + | Data Cloud AI Specialist |
| | + | Data Cloud Governance Specialist |

# Permission Set API Name Reference

Use these permission set API names with User Access Policies.

| Permission Set Name | Permission Set API Name |
|---|---|
| Data Cloud Admin | GenieAdmin |
| Data Cloud User | GenieUser |
| Data Cloud Marketing Admin | GenieMarketingAdmin |
| Data Cloud Data Aware Specialist | GenieMarketingDataAwareSpecialist |
| Data Cloud Marketing Manager | GenieMarketingManager |
| Data Cloud Marketing Specialist | GenieMarketingSpecialist |
| Data Cloud Architect | GenieAdmin |
| Data Cloud Activation Manager | DataCloudActManager |
| Data Cloud Activation Specialist | DataCloudActSpecialist |
| Data Cloud AI Specialist | DataCloudAISpecialist |
| Data Cloud Governance Specialist | DataCloudGovSpecialist |

# Permissions in Original and Revised Data 360 Permission Sets

Accesses granted by the revised and new permissions sets are more granular than accesses in similar legacy permission sets. To mimic the permissions available in legacy permission sets, consider assigning more than one standard permission set to users.

**Legend**

☑️ - The permission set grants Create, Edit, and Delete access to this feature

🔍 - The permission set grants View Only access to this feature

blank - The permission set doesn't grant access to this feature or visibility to its tab

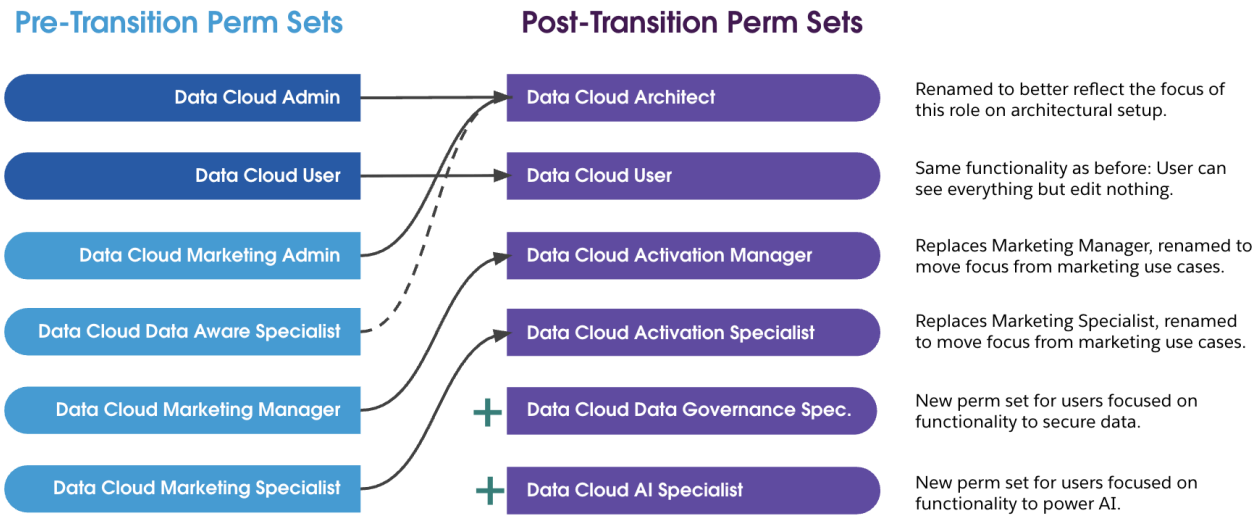
| Period | **All** | **Before September 4, 2025** | | | | | | **After September 4, 2025** | | | | **After Nov 2025** | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| License | Any | Data Cloud | | Segmentation & Activation Add-On | | | | Data Cloud | | | | | |
| Permission Set<br>Tab/Feature | Salesforce Admin Role | Data Cloud Admin | Data Cloud User | Data Cloud Marketing Admin | Data Cloud Data Aware Specialist | Data Cloud Marketing Manager | Data Cloud Marketing Specialist | Data Cloud Architect | Data Cloud Activation Manager | Data Cloud Activation Specialist | Data Cloud User | Data Cloud AI Specialist | Data Cloud Governance Spec. |
| **Data Cloud Setup** | ☑️ | ☑️ | | | | | | ☑️ | | | | | |
| **Data Spaces** | | ☑️ | | ☑️ | ☑️ | | | ☑️ | | | 🔍 | | ☑️ |
| **Data Governance** | | ☑️ | 🔍 | ☑️ | ☑️ | 🔍 | 🔍 | ☑️ | | | 🔍 | 🔍 | ☑️ |
| **Data Shares** | | ☑️ | 🔍 | ☑️ | ☑️ | 🔍 | 🔍 | ☑️ | | | 🔍 | | |

| Period | All | Before September 4, 2025 | | | | | | After September 4, 2025 | | | | After Nov 2025 | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| License | Any | Data Cloud | | Segmentation & Activation Add-On | | | | Data Cloud | | | | | |
| Permission Set<br>Tab/Feature | Salesforce Admin Role | Data Cloud Admin | Data Cloud User | Data Cloud Marketing Admin | Data Cloud Data Aware Specialist | Data Cloud Marketing Manager | Data Cloud Marketing Specialst | Data Cloud Architect | Data Cloud Activation Manager | Data Cloud Activation Specialist | Data Cloud User | Data Cloud AI Specialist | Data Cloud Governance Spec. |
| **Data Streams** | | ✅ | 🔍 | ✅ | ✅ | 🔍 | 🔍 | ✅ | 🔍 | 🔍 | 🔍 | ✅ | |
| **Data Lake Objects** (DLOs) | | ✅ | 🔍 | ✅ | ✅ | 🔍 | 🔍 | ✅ | 🔍 | 🔍 | 🔍 | ✅ | ✅ |
| **Data Model** (DMOs) | | ✅ | 🔍 | ✅ | ✅ | 🔍 | 🔍 | ✅ | 🔍 | 🔍 | 🔍 | ✅ | ✅ |
| **Data Transforms** | | ✅ | 🔍 | ✅ | ✅ | 🔍 | 🔍 | ✅ | | | 🔍 | ✅ | |
| **Data Graphs** | | ✅ | 🔍 | ✅ | ✅ | 🔍 | 🔍 | ✅ | 🔍 | 🔍 | 🔍 | 🔍 | 🔍 |
| **Data Explorer** | | 🔍 | 🔍 | 🔍 | 🔍 | 🔍 | 🔍 | 🔍 | 🔍 | 🔍 | 🔍 | 🔍 | 🔍 |
| **Query Editor** | | ✅ | 🔍 | ✅ | ✅ | 🔍 | 🔍 | ✅ | ✅ | ✅ | 🔍 | ✅ | |
| **Identity Resolution** | | ✅ | 🔍 | ✅ | ✅ | 🔍 | 🔍 | ✅ | 🔍 | 🔍 | 🔍 | | 🔍 |
| **Profile Explorer** | | 🔍 | 🔍 | 🔍 | 🔍 | 🔍 | 🔍 | 🔍 | 🔍 | 🔍 | 🔍 | | 🔍 |
| **Insights** | | ✅ | 🔍 | ✅ | ✅ | 🔍 | 🔍 | ✅ | 🔍 | 🔍 | 🔍 | | ✅ |

| Period | All | Before September 4, 2025 | | | | | | After September 4, 2025 | | | | After Nov 2025 | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| License | Any | Data Cloud | | Segmentation & Activation Add-On | | | | Data Cloud | | | | | |
| Permission Set<br>Tab/Feature | Salesforce Admin Role | Data Cloud Admin | Data Cloud User | Data Cloud Marketing Admin | Data Cloud Data Aware Specialist | Data Cloud Marketing Manager | Data Cloud Marketing Specialist | Data Cloud Architect | Data Cloud Activation Manager | Data Cloud Activation Specialist | Data Cloud User | Data Cloud AI Specialist | Data Cloud Governance Spec. |
| **Data Actions** | | ✅ | 🔍 | ✅ | ✅ | 🔍 | 🔍 | ✅ | ✅ | ✅ | 🔍 | | |
| **Data Action Targets** | | ✅ | 🔍 | ✅ | ✅ | 🔍 | 🔍 | ✅ | ✅ | 🔍 | 🔍 | | |
| **Comm. Capping** | | ✅ | | | | 🔍 | | ✅ | ✅ | 🔍 | 🔍 | | ✅ |
| **Segment** | | | | ✅ | 🔍 | ✅ | ✅ | ✅ | ✅ | ✅ | 🔍 | | ✅ |
| **Activations** | | | | ✅ | 🔍 | ✅ | 🔍 | ✅ | ✅ | ✅ | 🔍 | | |
| **Activation Targets** | | | | ✅ | 🔍 | ✅ | 🔍 | ✅ | ✅ | 🔍 | 🔍 | | |
| **Einstein Studio AI Models** | | ✅ | 🔍 | ✅ | ✅ | 🔍 | 🔍 | ✅ | | | 🔍 | ✅ | |
| **Unstructured Data Hub** | | ✅ | 🔍 | ✅ | ✅ | 🔍 | 🔍 | ✅ | 🔍 | | 🔍 | ✅ | |
| **Search Index** | | ✅ | 🔍 | ✅ | ✅ | 🔍 | 🔍 | ✅ | 🔍 | | 🔍 | ✅ | |
| **Semantic Layer** | | ✅ | 🔍 | | | | | ✅ | | | 🔍 | ✅ | |

# Data 360 Permission Set Transition Paths

After September 4, Data 360 marketing permission sets will be deprecated. We suggest transitioning most users to the new permission sets. Review Permissions in Original and Revised Data 360 Permission Sets to see how old and new permissions sets compare.




**Accessible Table**

This table contains the same information as the graphic but is formatted for accessibility.

| Original Permission Set | Transitions to | New or Revised Permission Set |
|---|---|---|
| Data Cloud Admin | → | Data Cloud Architect |
| (Legacy) Data Cloud Marketing Admin | | |
| (Legacy) Data Cloud Data Aware Specialist | | |
| (Legacy) Data Cloud Marketing Manager | → | Data Cloud Activation Manager |
| (Legacy) Data Cloud Marketing Specialist | → | Data Cloud Activation Specialist |
| Data Cloud User | → | Data Cloud User |
| | + | Data Cloud AI Specialist |
| | + | Data Cloud Governance Specialist |