



Household Data Model & Restriction Rule Usage

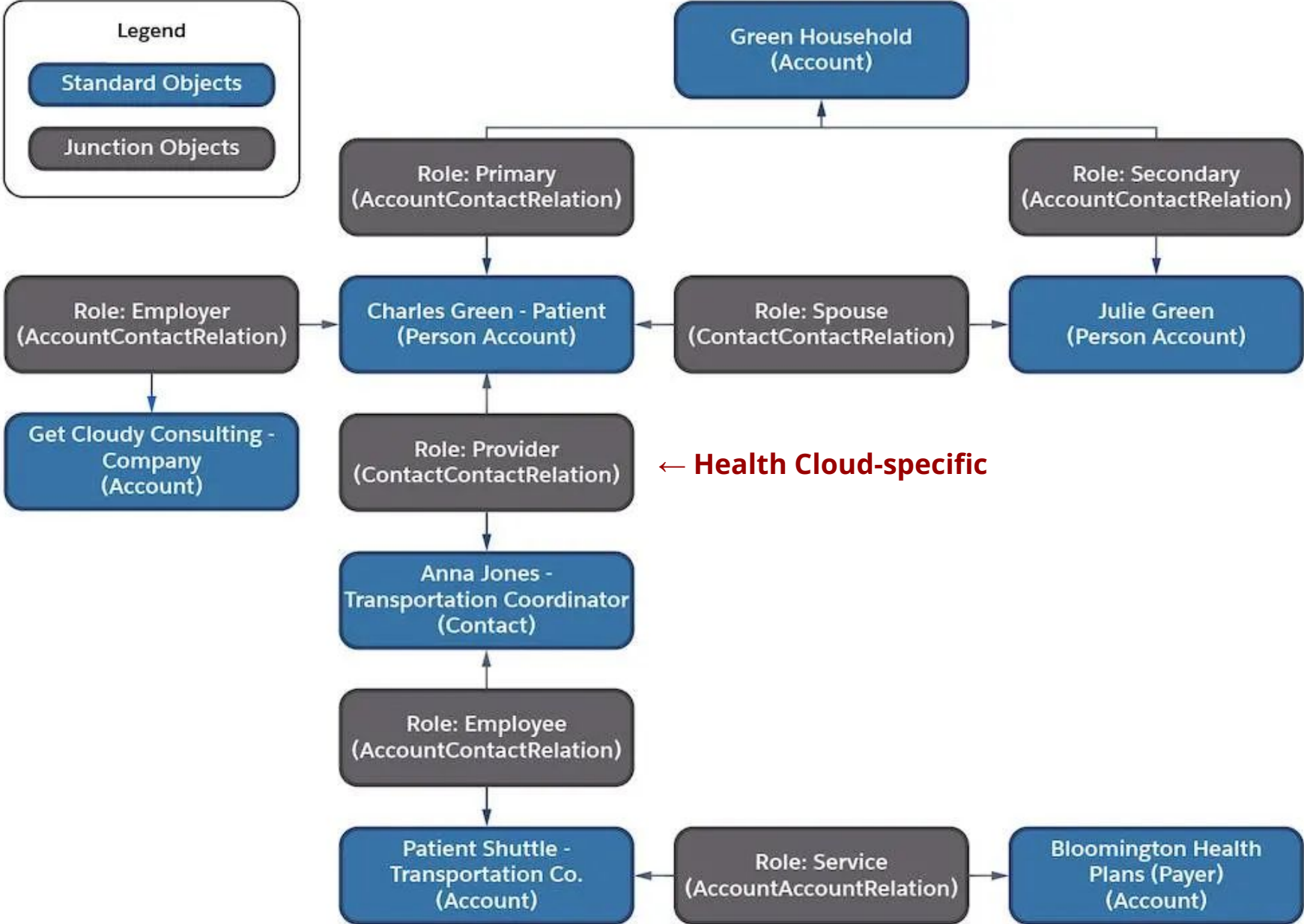
Svet Voloshin



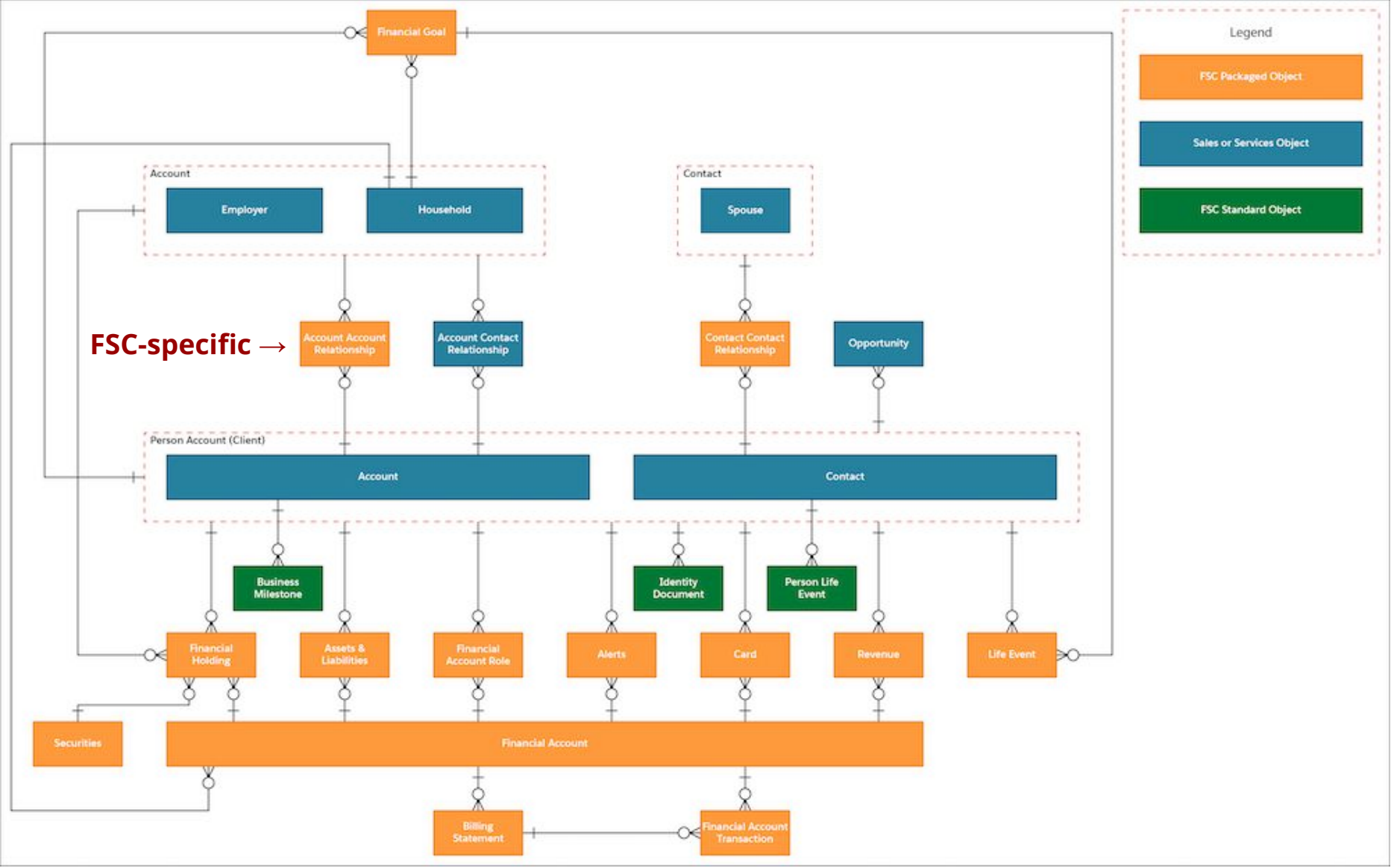
Problem Statement

- How can the existing standard Sales Cloud functionality be leveraged to model the relationships between individuals and groups of individuals?
- Scenario:
 - Universal Properties is a global company that manages apartment units in large metropolitan areas. Apartments managed by UP are typically owned by Landlords who own a portfolio of multiple apartments to let.
 - Universal Properties has 300,000 private customers who are often individuals, sharers or small families renting apartments. As part of UP's push to digitize their business, they plan to onboard tenants to a new portal.
 - Throughout the lifetime of a tenancy Tenants should be able to raise cases and maintenance requests via the portal.
 - User must be able to see their own contracts, as well as contracts that are associated with the household that they are a part of.
- Objects:
 - Account (Business) = Household
 - Account (Business) = Corporation (Landlord)
 - Person Account = Tenant
 - Contact = an Individual
 - Opportunity = Deal
 - Contract = Lease
 - Asset = Apartment
 - Case = Problem/Issue/Ticket

Health Cloud ERD (Simplified)



Financial Services Cloud ERD (Simplified)



Sales Cloud ERD (Abridged)



Key objects for sharing with CC Users:

- Account
- Contact
- Account-Contact Relationship

There is no standard...

- Account-Account relationship or
- Contact-Contact relationship

...in Sales Cloud

Account & Contract OWD

IMPORTANT: Separate OWDs cannot be defined for Account and Contract

- In many cases in order to decouple the two objects, a custom Contract object is used, which is not always ideal.
- OWDs for External Users can be "Private" or "Controlled by Parent", since the Sharing Sets are based on the Account.

Sharing Settings

[Help for this Page](#) ?

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

Manage sharing settings for:

Default Sharing Settings

Organization-Wide Defaults

[Organization-Wide Defaults Help](#) ?

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Private	Private	✓
Account and Contract	Private	Private	✓
Contact	Private	Private	✓
Order	Private	Private	✓
Asset	Private	Private	✓
Opportunity	Private	Private	✓

Organization-Wide Defaults

[Organization-Wide Defaults Help](#) ?

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Private	Private	✓
Account and Contract	Private	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓

Irrelevant, since we are sharing records with Customer Community Users.

[Account Sharing Rules Help \(New Window\)](#)

[Account Sharing Rules Help](#) ?

No sharing rules specified.

Household Account

- Not a special secret Salesforce Account Record type
- Standard Business Account
- Person Accounts are associated with it using [Account-Contact Relationship](#)

The screenshot displays the Salesforce interface for an Account Record titled "Krig Household". At the top, there are navigation buttons: "+ Follow", "Sharing", "Sharing Hierarchy", "New Contact", and "New Case". Below this, a header bar shows the account name "Krig Household" and the account owner "Svet Voloshin".

The main content area is divided into two sections: "Details" and "Additional Information". The "Details" section includes fields for Account Owner (Svet Voloshin), Account Name (Krig Household), Parent Account, Ultimate Parent Id, Ultimate Parent Account (Name), Account Currency (USD - U.S. Dollar), BillingLatitude (0), and BillingLongitude (0). The "Additional Information" section includes fields for Type, Employees, Industry, Annual Revenue, and Description.

On the right side, there are two panels: "Related Contacts (3)" and "Contracts (1)". The "Related Contacts" panel lists three contacts: Isaac Krig (Email: isaac@test.invalid), Alan Shen (Email: alan@test.invalid), and Agata Wasilewska (Email: agata@test.invalid). The "Contracts" panel shows one contract with ID 00000102, Status Draft, and End Date 11/30/2023.

The screenshot shows the "Account Contact Relationship" record for "Agata Wasilewska". It includes a header with the relationship name and account name. Below this, there are two sections: "Account Contact Relationship Information" and "System Information".

The "Account Contact Relationship Information" section includes fields for Account (Krig Household), Contact (Agata Wasilewska), Account Contact Relationship Currency (USD - U.S. Dollar), Active (checked), Direct (unchecked), and Roles.

The "System Information" section includes fields for Created By (Svet Gmail, 12/5/2022, 5:09 AM) and Last Modified By (Svet Gmail, 12/5/2022, 5:09 AM).



TRAILHEAD

Person Contract vs. Household Contract?

Contract 00000103

New Contact New Opportunity New Case

Account Name	Status	Contract Start Date	Contract End Date	Contract Term (months)
Isaac Krig	Draft	12/1/2022	11/30/2023	12

✓ ✓ Draft Mark Status as Complete

Related Details

Contract Owner	Contract Start Date
Svet Gmail	12/1/2022
Contract Number	Contract End Date
00000103	11/30/2023
Account Name	Contract Term (months)
Isaac Krig	12
Landlord Account	Owner Expiration Notice
Potomac Towers	60 Days
Status	
Draft	
Contract Currency	
USD - U.S. Dollar	

Contract Roles (0)

Contract History (1)

Date:	12/3/2022, 9:03 AM
Field:	Created.
User:	Svet Gmail
Original Value:	
New Value:	

View All

Person Contract: signed with a single person

Reason: single tenant, lives by themselves and pays the rent on their own.

Contract 00000102

New Contact New Opportunity New Case

Account Name	Status	Contract Start Date	Contract End Date	Contract Term (months)
Krig Tenancy	Draft	12/1/2022	11/30/2023	12

✓ ✓ Draft Mark Status as Complete

Related Details

Contract Owner	Contract Start Date
Svet Gmail	12/1/2022
Contract Number	Contract End Date
00000102	11/30/2023
Account Name	Contract Term (months)
Krig Tenancy	12
Landlord Account	Owner Expiration Notice
Potomac Towers	60 Days
Status	
Draft	
Contract Currency	
USD - U.S. Dollar	

Contract Roles (0)

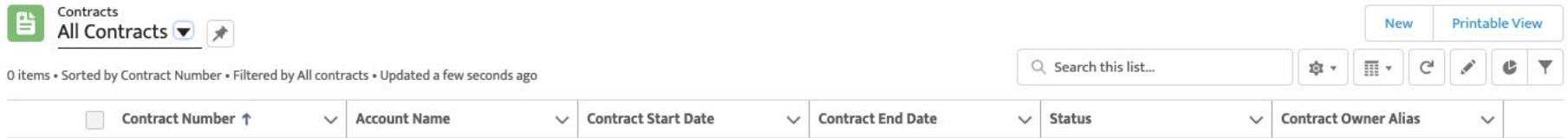
Contract History (2)

Date:	12/3/2022, 8:53 AM
Field:	Account Name
User:	Svet Gmail
Original Value:	Potomac Towers
New Value:	Krig Tenancy
Date:	12/3/2022, 8:44 AM
Field:	Created.
User:	Svet Gmail
Original Value:	
New Value:	

Household Contract: signed with an entire household

Reason: multiple tenants, live together and share the rent payments.

Account Fields on Contract Object



Contracts
All Contracts

0 items • Sorted by Contract Number • Filtered by All contracts • Updated a few seconds ago

Search this list...

Contract Number ↑ Account Name Contract Start Date Contract End Date Status Contract Owner Alias

- If one decides to use a custom Account Lookup field on Contract, the Customer Community User will not be able to see their Contracts by default.
- The recommended approach is to use the default Account field.
- Custom Account Lookup field can then be used to show Landlords.
- Additionally one can set the lookup filter to allow only the Business Account Record Type to be selected.

Contract Custom Field
Landlord Account
[Back to Contract Fields](#)

Lookup Filter

Filter Criteria Landlord Account: Account Record Type EQUALS Business

Filter Type Required. The user-entered value must match filter criteria.

Error Message Value does not exist or does not match filter criteria.

Lookup Window Text

Active

Requirements: Contract Visibility in Community Portal

Contract End Date Home Account Contacts Contracts Asset Case User16648169909136979104

Contracts All Contracts

2 items • Sorted by Contract Number • Filtered by All contracts • Updated 4 minutes ago

<input type="checkbox"/>	Contract Number ↑	Account Name	Contract Start Date	Contract End Date ↓	Status	Contract Owner ...
1	<input type="checkbox"/> 00000102	Krig Tenancy	12/1/2022	11/30/2023	Draft	<input type="button" value="▼"/>
2	<input type="checkbox"/> 00000103	Isaac Krig	12/1/2022	11/30/2023	Draft	<input type="button" value="▼"/>

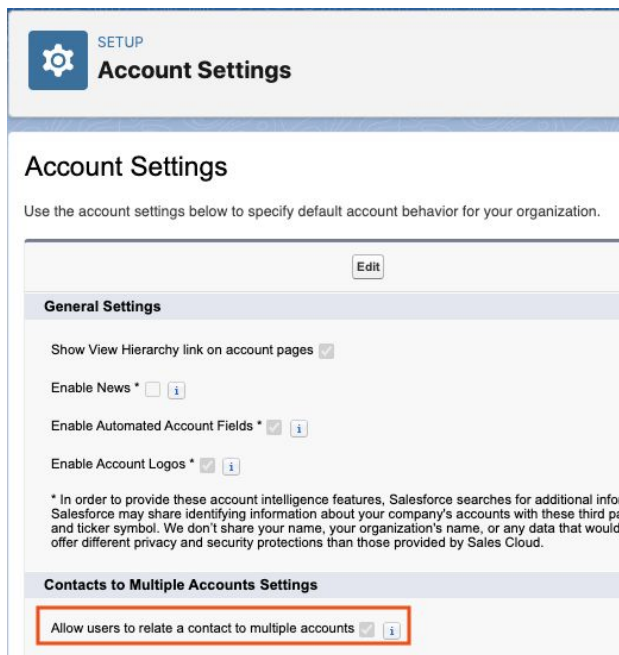
- User must be able to see their own contracts, as well as contracts that are associated with the household that they are a part of.
- The user can see their own contract, because they get access to their own Account record implicitly.
- The user can see contract that is associated with the household that they are a part of, because their own Person Account is associated with the Household (Business) Account via Account-Contact Relationship.

Sharing Sets - Granting access to CC Users

Access Granted				
Action	Object	Access Determined By		Access Level
Edit Del	Account	User:Contact.RelatedAccount = Account:Id		Read Only
Edit Del	Asset	User:Contact.RelatedAccount = Asset:Account		Read Only
Edit Del	Case	User:Contact.RelatedAccount = Case:Account.Parent		Read Only
Edit Del	Contact	User:Contact.RelatedAccount = Contact:Account		Read Only
Edit Del	Lease	User:Contact.RelatedAccount = Lease:Household__c		Read Only

- The only way to grant access to records to Customer Community users is by using [Sharing Sets](#).
- In the screenshot above, we have created Sharing sets on the Account-Contact Relationship object: *Contact.**Related**Account* (keyword is "Related")

Account-Contact Relationship (ACR)



SETUP Account Settings

Account Settings

Use the account settings below to specify default account behavior for your organization.

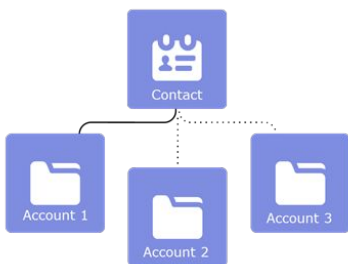
General Settings

- Show View Hierarchy link on account pages
- Enable News * [i](#)
- Enable Automated Account Fields * [i](#)
- Enable Account Logos * [i](#)

* In order to provide these account intelligence features, Salesforce searches for additional info. Salesforce may share identifying information about your company's accounts with these third parties and ticker symbol. We don't share your name, your organization's name, or any data that would offer different privacy and security protections than those provided by Sales Cloud.

Contacts to Multiple Accounts Settings

Allow users to relate a contact to multiple accounts [i](#)



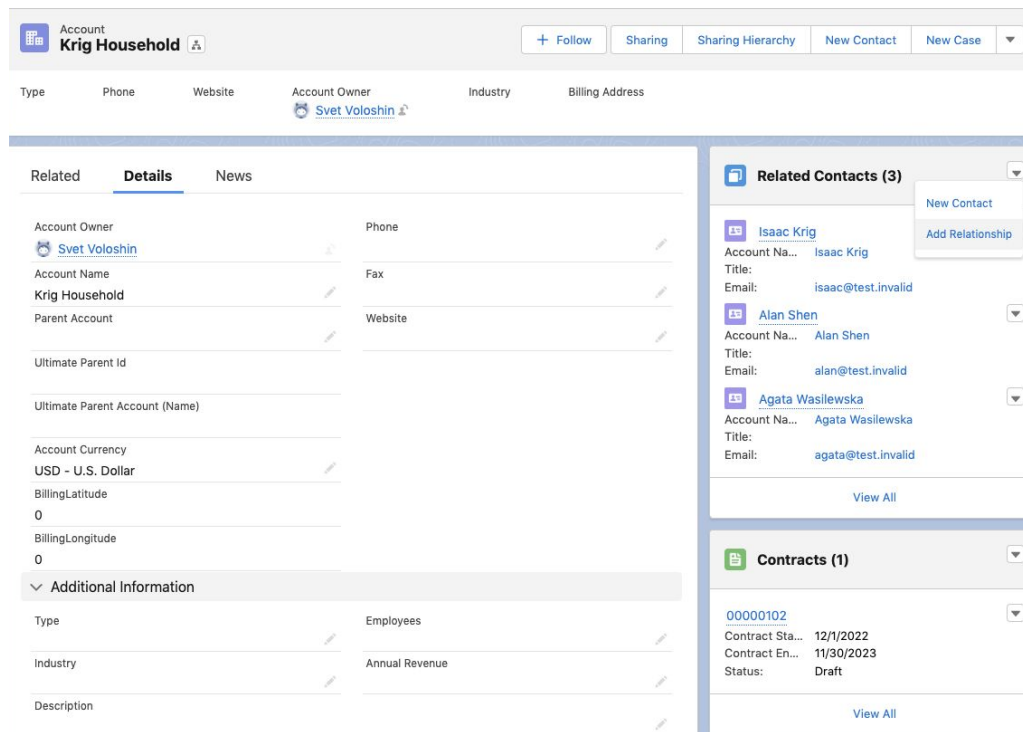
Step 1: Go to Account Settings and check "Allow users to relate a contact to multiple accounts"

Step 2: Go to an Account and click on "Add Relationship"

Step 3: Choose a Contact and select other relevant fields.

Step 4: Make sure ACR is **Active**.

IMPORTANT: If ACR is not Active, sharing sets will not work.



Account **Krig Household**

Follow Sharing Sharing Hierarchy New Contact New Case

Type Phone Website Account Owner **Svet Voloshin** Industry Billing Address

Related **Details** News

Account Owner: Svet Voloshin Phone: [edit]

Account Name: Krig Household Fax: [edit]

Parent Account: [edit]

Website: [edit]

Ultimate Parent Id: [edit]

Ultimate Parent Account (Name): [edit]

Account Currency: USD - U.S. Dollar [edit]

BillingLatitude: 0 [edit]

BillingLongitude: 0 [edit]

Additional Information

Type: [edit] Employees: [edit]

Industry: [edit] Annual Revenue: [edit]

Description: [edit]

Related Contacts (3)

- Isaac Krig**
Account Na...: Isaac Krig
Title: [edit]
Email: isaac@test.invalid
- Alan Shen**
Account Na...: Alan Shen
Title: [edit]
Email: alan@test.invalid
- Agata Wasilewska**
Account Na...: Agata Wasilewska
Title: [edit]
Email: agata@test.invalid

[View All](#)

Contracts (1)

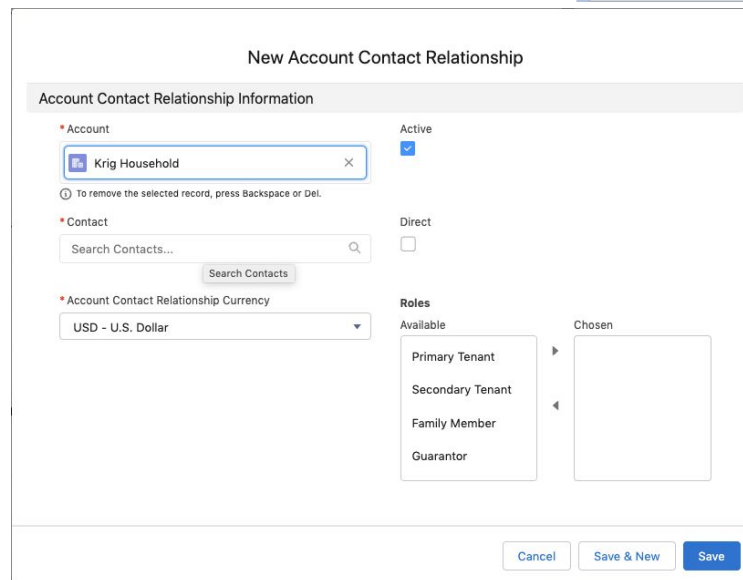
00000102 [edit]

Contract Sta...: 12/1/2022

Contract En...: 11/30/2023

Status: Draft

[View All](#)



New Account Contact Relationship

Account Contact Relationship Information

* Account: **Krig Household** Active

To remove the selected record, press Backspace or Del.

* Contact: Search Contacts... Direct

Search Contacts

* Account Contact Relationship Currency: USD - U.S. Dollar

Roles

Available: Primary Tenant, Secondary Tenant, Family Member, Guarantor

Chosen: [empty]

Cancel Save & New Save

Person Account-to-Person Account via ACR

Contacts

- Person accounts can't have **direct relationships** with contacts.
- You can use Contacts to Multiple Accounts to create **indirect relationships** between a person account and a contact.

Contacts to Multiple Accounts

- With Contacts to Multiple Accounts, a person account can be either a:
 - **related contact on a business account**
 - Or
 - **a related account on a contact.**
- A **person account** can also be related to **another person account** as either **a related contact or related account.**
- Person accounts are always indirectly related to other accounts or contacts.

Person Account-to-Person Account via ACR

The screenshot displays a Salesforce Lightning Record Page for a Person Account. The header shows the account name "Agata Wasilewska" and the account owner "Svet Voloshin". The main content area is divided into two sections: "Details" and "Related".

Details Section:

Account Owner	Svet Voloshin	Email	agata@test.invalid
Account Name	Agata Wasilewska	Phone	
Ultimate Parent Id		Fax	
Ultimate Parent Account (Name)		Website	
Account Currency	USD - U.S. Dollar		
BillingLatitude	0		
BillingLongitude	0		

Related Section:

Related Contacts (1)

Isaac Krig	Account N...	Isaac Krig
Title:		
Email:		isaac@test.invalid

Related Accounts (2)

Isaac Krig	Roles:	
Krig Household	Roles:	

- Person Accounts and their related Contact records both show up in related lists, if those lists have been added to the page layout and to the Lightning Record Page.
- Business Accounts only show up in the "Related Accounts" related list.

Opportunities & ACR

Opportunity
Apt. 103 - Krig Tenancy

[+ Follow](#) [Edit](#) [New Case](#) [New Note](#)

Account Name: [Krig Household](#) Close Date: 11/9/2022 Amount: USD 13,800.00 Opportunity Owner: [Svet Gmail](#)

Progress: [10 steps, 10th is Closed Won] [Change Closed Stage](#)

Activity **Details** Chatter

Opportunity Owner	Svet Gmail	Close Date	11/9/2022
Opportunity Name	Apt. 103 - Krig Tenancy	Stage	Closed Won
Account Name	Krig Household	Probability (%)	100%
Type	New Business	Amount	USD 13,800.00
Primary Campaign Source			
Opportunity Currency	USD - U.S. Dollar		
Additional Information			
Lead Source			
Next Step			
Description			
System Information			
Created By	Svet Gmail , 12/3/2022, 1:47 PM	Last Modified By	Svet Gmail , 12/5/2022, 3:42 PM

Related

Contact Roles (2)

- [Isaac Krig](#) PRIMARY
Role: Decision Maker
Title:
- [Agata Wasilewska](#)
Role: Influencer
Title:

[View All](#)

Partners (0)

Products (2)

- [1BR Apt.](#)
Quantity: 1.00
Sales Price: USD 12,600.00
Date:
- [Garage Spot](#)
Quantity: 1.00
Sales Price: USD 1,200.00
Date:

[View All](#)

Opportunity Contact Roles

You can relate person accounts to opportunities using the Contact Roles related list.

Reporting for ACR

Create Custom Report Types for Account Contact Relationships

1. Make sure you're familiar with custom report types and the general steps for creating and maintaining them.
2. Create custom report types with the appropriate object relationships, and configure them as necessary.

Check out these examples of custom report types to get you started.

REPORT TYPE	LETS TEAMMATES RUN REPORTS THAT SHOW	A (PRIMARY OBJECT)	B	C	MAKE SURE YOU ALSO
Related Contacts	All the contacts, both direct and indirect, that are related to accounts.	Accounts	Contact Relationships		Add the Direct and Full Name fields to the Contact Relationships page layout.
Related Accounts	All the accounts, both direct and indirect, that are related to contacts.	Contacts	Account Relationships		
Related Contacts with or without Activities	All the contacts, both direct and indirect, that are related to accounts, and whether there's recent activity.	Accounts	Contact Relationships	Activities	

3. Deploy the report types you want to make available.
4. Let your sales teams know that they can create reports using these custom report types.

Report Samples



Report: Related Accounts Related Accounts Report

Total Records

13

<input type="checkbox"/> Full Name ↑	Account Name	Account Record Type
<input type="checkbox"/> Agata Wasilewska (2)	Krig Household	Household
	Isaac Krig	Person Account
Subtotal		
<input type="checkbox"/> Alan Shen (1)	Krig Household	Household
Subtotal		
<input type="checkbox"/> Carole White (1)	Global Media	-
Subtotal		
<input type="checkbox"/> Edward Stamos (1)	Acme	-
Subtotal		
<input type="checkbox"/> Geoff Minor (1)	Global Media	-
Subtotal		
<input type="checkbox"/> Howard Jones (1)	Acme	-
Subtotal		
<input type="checkbox"/> Isaac Krig (2)	Krig Household	Household
	Agata Wasilewska	Person Account
Subtotal		
<input type="checkbox"/> Jon Amos (1)	Global Media	-
Subtotal		
<input type="checkbox"/> Leanne Tomlin (1)	Acme	-
Subtotal		
<input type="checkbox"/> Marc Benioff (1)	salesforce.com	-
Subtotal		
<input type="checkbox"/> Svet Voloshin (1)	Svet's Company	Business
Subtotal		
Total (13)		



Report: Related Contacts Related Contacts Report

Total Records

13

<input type="checkbox"/> Account Name ↑	Full Name	Account Record Type
<input type="checkbox"/> Acme (3)	Edward Stamos	-
	Howard Jones	-
	Leanne Tomlin	-
Subtotal		
<input type="checkbox"/> Agata Wasilewska (1)	Isaac Krig	Person Account
Subtotal		
<input type="checkbox"/> Global Media (3)	Geoff Minor	-
	Carole White	-
	Jon Amos	-
Subtotal		
<input type="checkbox"/> Isaac Krig (1)	Agata Wasilewska	Person Account
Subtotal		
<input type="checkbox"/> Krig Household (3)	Alan Shen	Household
	Agata Wasilewska	Household
	Isaac Krig	Household
Subtotal		
<input type="checkbox"/> salesforce.com (1)	Marc Benioff	-
Subtotal		
<input type="checkbox"/> Svet's Company (1)	Svet Voloshin	Business
Subtotal		
Total (13)		

Other Objects' Visibility

Access Granted

Action	Object	Access Determined By	Access Level
Edit Del	Account	User:Contact.RelatedAccount = Account:Id	Read Only
Edit Del	Asset	User:Contact.RelatedAccount = Asset:Account	Read Only
Edit Del	Case	User:Contact.RelatedAccount = Case:Account.Parent	Read Only
Edit Del	Contact	User:Contact.RelatedAccount = Contact:Account	Read Only
Edit Del	Lease	User:Contact.RelatedAccount = Lease:Household__c	Read Only

Accounts
All Accounts

3 items • Sorted by Account Name • Filtered by All accounts • Updated a few seconds ago

Account Name	Account Record...	Billing S...	Email	Phone	Type	Account...
1 Agata Wasilewska	Person Account		agata@test.invalid			
2 Isaac Krig	Person Account		isaac@test.invalid			
3 Krig Household	Household					

- Logged-in User is Agata
- Main Household User is Isaac
- Both Agata & Isaac have Person Accounts
- Both Agata & Isaac's Person Accounts are related to the **Krig Household Account** (Business)
- They are also related to one-another

Is this a good idea?

Contacts
All Contacts

2 items • Sorted by Name • Filtered by All contacts • Updated a minute ago

Name	Account Name	Account: Acco...	Title	Phone	Email	Contact...
1 Agata Wasilewska	Agata Wasilewska	Person Account			agata@test.invalid	
2 Isaac Krig	Isaac Krig	Person Account			isaac@test.invalid	

Contracts
All Contracts

2 items • Sorted by Contract Number • Filtered by All contracts • Updated a few seconds ago

Contract Nu...	Account Name	Contract Start ...	Contract End Da...	Status	Contract ...
1 00000102	Krig Household	12/1/2022	11/30/2023	Draft	
2 00000103	Isaac Krig	12/1/2022	11/30/2023	Draft	

- Notice that Agata can see Isaac's personal records
- This is a security risk

How can this be prevented?

Assets
All Assets

2 items • Sorted by Asset Name • Filtered by All assets • Updated a few seconds ago

Asset Name	Serial Num...	Install Date	Account Name	Contact Na...	Product Name
1 Apt. 103			Krig Household		
2 Apt. 940			Isaac Krig		1BR Apt.

Leases
All

2 items • Sorted by Contract Name • Filtered by All leases • Updated a few seconds ago

Contract Name
1 Potomac Towers - Apt. 103 - Krig Tenancy
2 Potomac Towers - Apt. 940 - Isaac Krig

- In this case, it's best not to related Person Accounts to one-another

←Custom Object

Restriction Rules

SETUP > OBJECT MANAGER
Contract

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Triggers
Flow Triggers

Contract
Restriction Rules New Rule

Sharing (Grants Access) Filtering (Refines Access) Result Set

```
graph LR; A[Organization-Wide Sharing Defaults] --> B[Sharing Mechanisms (optional)]; B --> C[Restriction Rules]; C --> D[Filtered Records];
```

Organization-Wide Sharing Defaults
Set a default access level for an object's records.

Sharing Mechanisms
(optional)
Configure role hierarchy, sharing rules, and more.

Restriction Rules
Filter records based on user and record criteria.

Filtered Records
Only records that meet restriction rule criteria are visible.

Use restriction rules when you want certain users to only see a specific set of records.

Create New Rule

[Step By Step Guide to Using Restriction Rules in Salesforce](#) (Ashish Agarwal)

Restriction Rules on Contract

Supported Objects

- Custom Objects
- **Contracts**
- Events
- Tasks
- Time Sheets
- Timesheet Entries

Contracts are supported, probably because they are locked to the same

Sharing Settings

[Help for this Page](#)

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

Manage sharing settings for:

Default Sharing Settings

Organization-Wide Defaults

[Organization-Wide Defaults Help](#)

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Private	Private	✓
Account and Contract	Private	Private	✓
Contact	Private	Private	✓
Order	Private	Private	✓
Asset	Private	Private	✓
Opportunity	Private	Private	✓

SETUP > OBJECT MANAGER

Contract

Details

Contract Restriction Rules

Restriction rules let you control which records a specific group of users are permitted to see. When a restriction rule is applied to a user, the data that the user has access to via org-wide defaults, sharing rules, and other sharing mechanisms is filtered by the record criteria that you specify. You can create up to 2 active rules.

1 of 2 active rules, Sorted by Rule Name

<input type="checkbox"/>	Rule Name	Description	Is Active	User Criteria	Record Criteria
<input type="checkbox"/>	Customer Signed by			\$User.IsActive=true	CustomerSigned.Email=\$User.Email
<input type="checkbox"/>	Restrict Personal Contracts		✓	\$User.IsActive=true	Personal_c=false

Key Restriction Rule Considerations

- The use of AND and OR operators isn't supported.
- The use of formulas isn't supported.
- 2 restriction rules per object in Enterprise and Developer editions
- 5 restriction rules per object in Performance and Unlimited editions.
- 1 restriction or scoping rule **per object per user**.
 - *In other words, for a given object, only one restriction or scoping rule at most can have the User Criteria field evaluate to true for a given user.*

Do RR rules help in the Household Model?

Contract Restriction Rules

Delete Edit

Created By	Created Date	Last Modified By	Last Modified Date
Svet Gmail	Dec 5, 2022	Svet Gmail	Dec 5, 2022

Rule Detail

* Rule Name
Restrict Personal Contracts

* Full Name
Restrict_Personal_Contracts

Description
Description

Is Active

User Criteria

Select which users this restriction rule applies to.

* Criteria Type
User Criteria

* Field * Operator * Type * Value

\$User.IsActive Equals Boolean True

⚠ Design your restriction rules so that only one active rule applies to a given user.

Record Criteria

Select which records the specified users are allowed to see.

* Criteria Type
Record Field

* Field * Operator * Type * Value

[Contract].Personal_c Equals Boolean False

Objective: hide users' personal records, while maintaining Person Account-to-Person Account connection via ACR.

- Both Users have the same Customer Community License
- Both Users are treated equally by the system
- Absence of dynamic evaluation criteria renders Restriction Rules **ineffective** in this case
- One would have to create multiple restriction rules AND enter a condition where both rules apply, just like in declarative automation
- This is not possible currently with Restriction Rules.

Positive Case for RR rules on Contract

Contract Restriction Rules

Delete

Edit

Created By Svet Gmail	Created Date Dec 5, 2022	Last Modified By Svet Gmail	Last Modified Date Dec 5, 2022
--------------------------	-----------------------------	--------------------------------	-----------------------------------

Rule Detail

* Rule Name

Activated Contracts Only

* Full Name

Activated_Contracts_Only

Description

Description

Is Active

User Criteria

Select which users this restriction rule applies to.

* Criteria Type

User Criteria

* Field

\$User.IsActive

* Operator


Equals

* Type

Boolean

* Value

True

 Design your restriction rules so that only one active rule applies to a given user.

Record Criteria

Select which records the specified users are allowed to see.

* Criteria Type

Record Field

* Field

[Contract].Status

* Operator

Equals

* Type

Picklist

* Value

Activated

- Show only **Activated** Contracts
- That could be useful, since it would apply to ALL Customer Community Users as a **Business Rule**

Thank you!

Ways to get in touch...

[Connect with me on LinkedIn](#)
BAH Teams/Slack/Email/Phone
