

# How to use Account Restrictions with Objects


The purpose of this document is to show how we made the configurations to use Account Restriction with a Custom

## Instructions

Follow the steps below and watch the videos:

1. Create the Accounts and Users
2. Create the Custom Object (for this example, I named it "Purchase Order")
3. Create a relationship between Account and Purchase Order
4. Activate the Account Restriction and Publish the object  
[activateAccountRestriction.mp4](#)
5. Create the roles
6. Set the permissions for the Object
7. Assign each user to the role  
[setPermissionsAssignUser.mp4](#)
8. Link Users and Accounts  
[manageUsers.mp4](#)
9. Add a Widget Page for the created object  
[createPurchaseOrderPage.mp4](#)

## Accounts Restriction in a Use Case

 This is just an illustrative example

In this section, we will simulate a real usage of Accounts Restriction, and show how each user has access to the corrects Accounts and object entries :

1. As a Manager for account ABC, I want to create an order on behalf of ABC Corp.  
[joeBlogsCreatesOrder.mp4](#)
2. As an Admin (Power User), I want to create Orders on behalf of ABC Corp and XYZ Corp  
[testTestCreatesOrder.mp4](#)
3. As a Manager for account ABC, I want to view other Purchase Orders that have been created on behalf of ABC Corp  
[joeBlogsCanSeeOrders.mp4](#)
4. As a Manager for account ABC, I want to be able to edit any Purchase Order created on behalf of ABC Corp.  
[joeBlogsCanEditAnyOrder.mp4](#)
5. As a Technical Buyer, I can not see any Purchase Orders. (Only the ones created by me)  
[joeTechOnlyCanCreateOrder.mp4](#)
6. As a Manager for account XYZ, I can not see any Purchase Orders created for other Accounts  
[sueCanNotSeeOrderForABC.mp4](#)