

## Lecture4: Record Level Security - OWD

**Step 1:** The first step is to search for Users and then click on the Login button located on the fifth option. So, that you can see how many records this user has.

**SETUP Users**

**All Users** [Help](#)

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: **All Users** [Edit](#) [Create New View](#)

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

Action	Full Name ↑	Alias	Username	Last Login	Role	Active	Profile
<a href="#">Edit</a>	Chatter Expert	Chatter	chatty.00d5g000004i89deag.e11evyfj2ko5@chatter.salesforce.com			✓	Chatter Free User
<a href="#">Edit</a>	User Admin	AUser	sfdcconfigurations@gmail.com	5/23/2021, 5:48 AM		✓	System Administrator
<a href="#">Edit</a>	User Integration	integ	integration@00d5g000004i89deag.com			✓	Analytics Cloud Integration User
<a href="#">Edit</a>	User Security	sec	insightssecurity@00d5g000004i89deag.com			✓	Analytics Cloud Security User
<a href="#">Edit</a>	<b>User_Test</b>	tuser	sfconfigimplementestuser@gmail.com	5/9/2021, 9:12 PM		✓	My Profile

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

**Step 2:** Now if you click on the All Accounts, so you can able to see that the user has 22 account records that are created by an admin user.

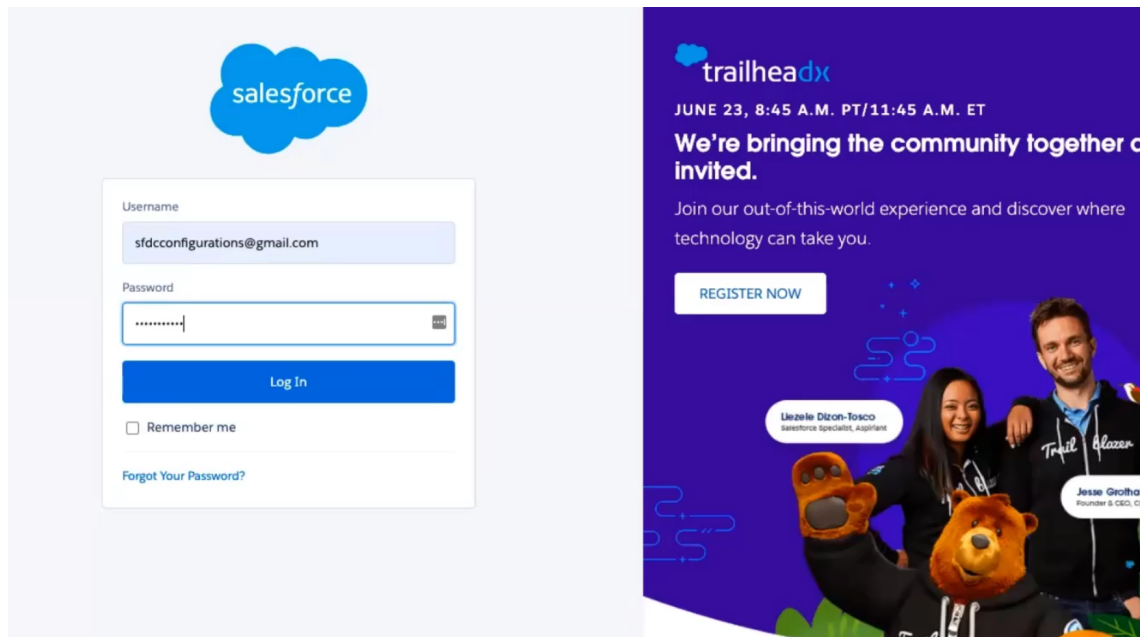
**Accounts All Accounts** [New Account](#) [Reset Password\(s\)](#) [Add Multiple Accounts](#)

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

[Search](#)

Account Name ↑	Account Site	Billing State/Provi...	Phone	Type
8 <a href="#">GenePoint</a>		CA	(650) 867-3450	Customer
9 <a href="#">Grand Hotels &amp; Resorts Ltd</a>		IL	(312) 596-1000	Customer
10 <a href="#">Individual Acc</a>				
11 <a href="#">Pyramid Construction Inc.</a>			(014) 427-4427	Customer
12 <a href="#">Sample Account for Entitlements</a>				
13 <b>sForce</b>		CA	(415) 901-7000	
14 <a href="#">Test Acc 001</a>			1234	
15 <a href="#">Test Acc 002</a>			12345	
16 <a href="#">Test Acc 003</a>			123456	
17 <a href="#">Test Acc 004</a>			1234567	
18 <a href="#">Test Acc 123</a>			1234567	Prospect
19 <a href="#">United Oil &amp; Gas Corp.</a>		NY	(212) 842-5500	Customer
20 <a href="#">United Oil &amp; Gas, Singapore</a>		Singapore	(650) 450-8810	Customer
21 <a href="#">United Oil &amp; Gas, UK</a>		UK	+44 191 4956203	Customer
22 <a href="#">University of Arizona</a>		AZ	(520) 773-9050	Customer

**Step 3:** Now log out with the test user and log in with the admin user to control the record level security.



**Step 4:** First you need to restrict sharing of records, for that you have to search for sharing settings and click on the edit button.

The image is a screenshot of the Salesforce Setup page. The top navigation bar shows 'Setup', 'Home', and 'Object Manager'. A search bar on the left contains 'sharin'. Below the search bar, the 'Security' section is expanded, and 'Sharing Settings' is highlighted with a red box. The main content area is titled 'Sharing Settings' and contains a description: '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 recalculate organization-wide default or a parallel sharing recalculation.' Below this is a dropdown menu for 'Manage sharing settings for:' set to 'All Objects'. There is a button 'Disable External Sharing Model'. The 'Default Sharing Settings' section is expanded, showing 'Organization-Wide Defaults' with an 'Edit' button highlighted by a red box. Below this is a table with three columns: 'Object', 'Default Internal Access', and 'Default External Access'.

Object	Default Internal Access	Default External Access
Lead	Public Read/Write/Transfer	Private
Account and Contract	Public Read/Write	Private
Contact	Controlled by Parent	Controlled by Parent
Order	Controlled by Parent	Controlled by Parent
Asset	Controlled by Parent	Controlled by Parent
Opportunity	Public Read/Write	Private
Case	Public Read/Write/Transfer	Private
Campaign	Public Full Access	Private
Campaign Member	Controlled by Campaign	Controlled by Campaign

**Step 5:** As you can see in the previous image that the “Account and Contract” is set as the “Public Read/Write” option. Instead of the “Public Read/Write” option, you need to set it as the “Private” option. And click on the Save button.

The screenshot shows the Salesforce Sharing Settings page. The title is "Organization-Wide Sharing Defaults Edit". Below the title is a warning message: "Edit your organization-wide sharing defaults below. Changing these defaults will cause all sharing rules to be recalculated. This could require significant system resources and of data in your organization. Setting an object to Private makes records visible to record owners and those above them in the role hierarchy, and access can be extended using sharing rules." Below the warning is a table with four columns: "Object", "Default Internal Access", "Default External Access", and "Grant Access Using Hierarchies". The "Account and Contract" row is highlighted, and the "Default Internal Access" dropdown is set to "Private". The "Save" button is highlighted with a red box.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	<input checked="" type="checkbox"/>
Account and Contract	Private	Private	<input checked="" type="checkbox"/>
Order	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Contact	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Asset	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Opportunity	Private	Private	<input checked="" type="checkbox"/>
Case	Private	Private	<input checked="" type="checkbox"/>
Campaign	Public Full Access	Private	<input checked="" type="checkbox"/>
Campaign Member	Controlled by Campaign	Controlled by Campaign	<input checked="" type="checkbox"/>
User	Public Read Only	Private	<input checked="" type="checkbox"/>
Individual	Public Read/Write	Private	<input checked="" type="checkbox"/>

**Step 6:** Now, you need to log in with the test user again. And this time you will see test user can view only those records which are owned by the test user. As you can see that this test user does not own any records.

The screenshot shows the Salesforce Accounts page. The title is "Accounts" and the subtitle is "All Accounts". Below the title is a message: "0 items - Sorted by Account Name - Filtered by All accounts - Updated a few seconds ago". Below the message is a table with columns: "Account Name", "Account Site", "Billing State/Province", "Phone", and "Type". The table is empty, and the message "No items to display." is shown at the bottom.

Account Name	Account Site	Billing State/Province	Phone	Type
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**Step 7:** Let's create one new record. Naming it as Test Acc User Record, selecting a rating as hot, and click on the Save button. And then this record will be created.

Account Information

Account Owner  
Test User

Parent Account  
Search Accounts...

\* Account Name  
Test Acc User Record

\* Rating  
Hot  
Complete this field.

Account Number

Account Site

Type  
--None--

Industry  
--None--

Annual Revenue

Mobile Number (Home)

Phone

Fax

Website

Ticker Symbol

Ownership  
--None--

Employees

Cancel Save & New Save

**Step 8:** Now if you will click on the Account option, it will show the record that you created as the owner of this account is the test user.

Accounts

All Accounts

1 item • Sorted by Account Name • Filtered by All accounts • Updated a few seconds ago

	Account Name ↑	Account Site	Billing State/Province	Phone	Type	Account Owner
1	Test Acc User Record					tuse