

Set Customer Restrictions Setup

Introduction

We have a feature in which you can restrict the customers for your job owners. Customers who are configured as restricted customers for a user, will be allowed as customers for the job owned by that user. If no customer is configured as a restricted customer for the user, then all customers will be allowed as customers of the job for that user.

In this guide, we will see how you can restrict customers for your job owners and allow them to use only restricted customers as customers of the job for the user.

Prerequisites

1. Click the user details icon at the top right corner.

Neilon Project Man... Request Manager Job Manager Job Calendar Invoice Manager Outstanding Invoices Email Invoices Invoice Reminders Review Invoice Feedbacks NEILON-JOB-72 | Job

Request Manager

Keyword Search Records Search Show All Records Add Filter Remove All

Requests (43) New Request Send Quote

	Request#	Requester N...	Requester Email	Creat...	Requested By	Job Entity Name	Job...	T...	Al...	H...	Tot...	Status
☐	REQ-2024-0001825	Shyam Rajput	srajput@amazon.com	19-Feb-20...	Amazon	Ajanta Tech	5,000	200	1,500	500	7,200	Quote Sent
☐	REQ-2024-0001826	Gourav More	gmore@perficienttechnologies.com	19-Feb-20...	Perficient Pvt Ltd	Bee Basket Solutions Pvt Ltd	8,000	100	1,300	300	10,400	Quote Sent
☐	REQ-2024-0001822	James Garfield	jgarfield@myntradesigns.com	06-Feb-20...	Myntra Designs Pvt Ltd	ASOS Pvt Ltd	5,000	700	405	200	6,405	Won
☐	REQ-2024-0001821	Rupesh Desai	desairupesh@click2cloud.com	06-Feb-20...	Click2cloud Services Pvt Ltd	Goneka Pvt Ltd	700	50	300	60	1,510	Won
☐	REQ-2024-0001814	Sheryansh Rodge	srodge@andhrabankcorp.com	05-Feb-20...	Andhra bank	West Ham Bank Pvt Ltd	1,800	30	600	90	2,700	Won

2. Click on **Edit Page**.

Neilon Project Man... Neilon Jobs Administration Request Manager Job Manager Job Calendar Invoice Manager Outstanding Invoices Email Invoices Invoice Reminders

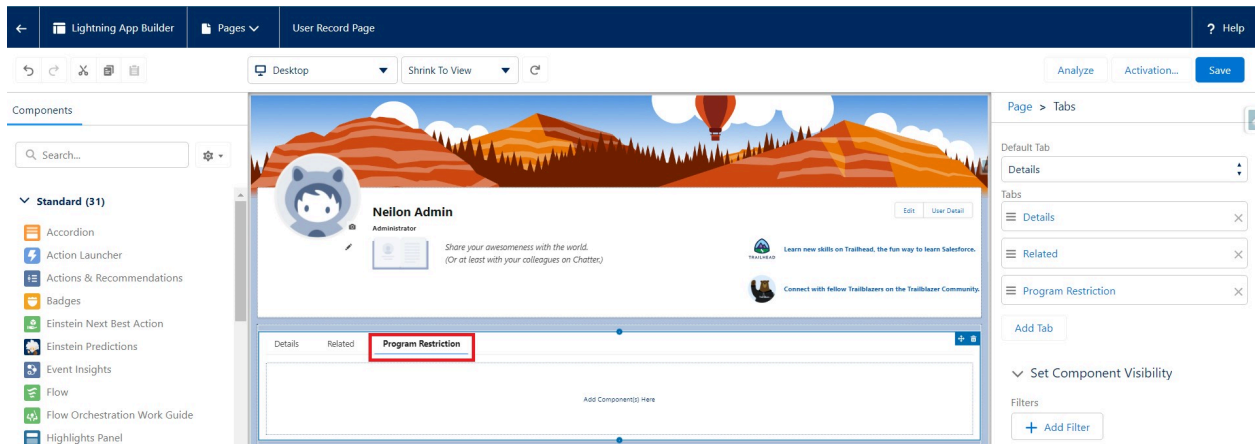
Neilon Admin Administrator

Share your awesomeness with the world. (Or at least with your colleagues on Chatter.)

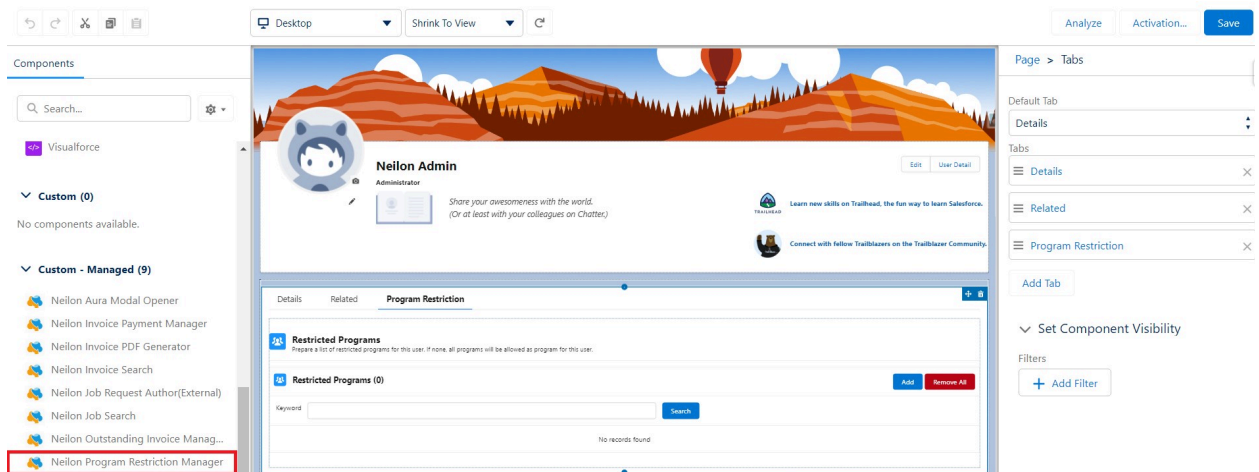
Learn new skills on Trailhead Connect with fellow Trailblazers

Setup for current app Service Setup Developer Console Edit Page Edit Object

3. Add a new tab **Program Restriction**.



4. Drag and drop the **Neilon Program Restriction Manager** component in the program restriction tab.



5. Click on the **Save** button.
6. Activate the page if required.

Functionality Overview

Follow the below steps to set customer/program restrictions for the user.

1. Click the user details icon which is at the top right corner.

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Request Manager

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- Go to the **Program Restriction** section. It will show the below UI.
 - If there are already Restricted Programs/Customers then it will show that in the table. Otherwise, it will show a “No records found” message.
 - If you don’t have permission then it will show “You do not have permissions for this. Please contact your System Administrator.” message.

Details Related **Program Restriction**

Restricted Programs
Prepare a list of restricted programs for this user. If none, all programs will be allowed as program for this user.

Restricted Programs (0) Add Remove All

Keyword

No records found

- Click on the **Add** button. It will show all customer account records of your org in the table.

Add Programs

Keyword

Search

Account Name	Billing Country	Program	Job Entity	Vendor	Licensee	Agent
Ernst & Young Private Limi...	India	✓			✓	✓
Yash Technologies Pvt Ltd	India	✓				✓
Patil Foundation Pvt Ltd	India	✓				✓
India Today Pvt Ltd	India	✓				
Snapdeal Fashion Pvt Ltd	India	✓				
eBorn Communication lab...	India	✓				✓
eBorn Communication Lab...	India	✓		✓	✓	
Yahoo India Pvt Ltd	India	✓	✓		✓	
Rudra Software Solutions. ...		✓				
Flipkart India Pvt Ltd	India	✓		✓		✓

Add Programs Cancel

- Now select those customer records that have to be restricted for the jobs of this user.

Add Programs

☐	Account Name	Billing Country	Program	Job Entity	Vendor	Licensee	Agent
☒	Ernst & Young Private Limi...	India	✓			✓	✓
☒	Yash Technologies Pvt Ltd	India	✓				✓
☒	Patil Foundation Pvt Ltd	India	✓				✓
☒	India Today Pvt Ltd	India	✓				
☐	Snapdeal Fashion Pvt Ltd	India	✓				
☐	eBorn Communication Lab...	India	✓				✓
☐	eBorn Communication Lab...	India	✓		✓	✓	
☐	Yahoo India Pvt Ltd	India	✓	✓		✓	
☐	Rudra Software Solutions. ...		✓				
☐	Flipkart India Pvt Ltd	India	✓		✓		✓

- Click on the **Add Programs** button.
- All selected customers are added as **Restricted Programs** and it will show in the table.

Details Related **Program Restriction**

Restricted Programs
Prepare a list of restricted programs for this user. If none, all programs will be allowed as program for this user.

Restricted Programs (4)

Account Name	Billing Country	Program	Job Entity	Vendor	Licensee	Agent	
Ernst & Young Private Limited	India	✓			✓	✓	Delete
Yash Technologies Pvt Ltd	India	✓				✓	Delete
Patil Foundation Pvt Ltd	India	✓				✓	Delete
India Today Pvt Ltd	India	✓					Delete

- If you want to remove any customer from **Restricted Programs**, then click on the row-level **Delete** action for that customer.

Details Related **Program Restriction**

Restricted Programs
Prepare a list of restricted programs for this user. If none, all programs will be allowed as program for this user.

Restricted Programs (4)

Account Name	Billing Country	Program	Job Entity	Vendor	Licensee	Agent	
Ernst & Young Private Limited	India	✓			✓	✓	Delete
Yash Technologies Pvt Ltd	India	✓				✓	Delete
Patil Foundation Pvt Ltd	India	✓				✓	Delete
India Today Pvt Ltd	India	✓					Delete

- If you want to remove all customers then click on the **Remove All** button.

Details
Related
Program Restriction

Restricted Programs
Prepare a list of restricted programs for this user. If none, all programs will be allowed as program for this user.

Restricted Programs (4)
Add
Remove All

Keyword Search

Account Name	Billing Country	Program	Job Entity	Vendor	Licensee	Agent	
Ernst & Young Private Limited	India	✓			✓	✓	⌵
Yash Technologies Pvt Ltd	India	✓				✓	⌵
Patil Foundation Pvt Ltd	India	✓				✓	⌵
India Today Pvt Ltd	India	✓					⌵

9. You can also search the customers. Enter the customer name in the search input box and click on the **Search** button or hit the Enter button. It will show the search results in the table.

Details
Related
Program Restriction

Restricted Programs
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Restricted Programs (4)
Add
Remove All

Keyword Search

Account Name	Billing Country	Program	Job Entity	Vendor	Licensee	Agent	
Ernst & Young Private Limited	India	✓			✓	✓	⌵
Yash Technologies Pvt Ltd	India	✓				✓	⌵
Patil Foundation Pvt Ltd	India	✓				✓	⌵
India Today Pvt Ltd	India	✓					⌵