



User Guide

User Record Permission



Overview

User Record Permission is a flexible component that allows to outline the permissions that grant a user access to a record by using point and click.

The purpose of this component is to provide an easy, quick and thorough search of a user's permissions on a record. It details which permissions such as *profile*, *permission set* or *permission set group* the user must access the record as well as show the default sharing setting of the object.

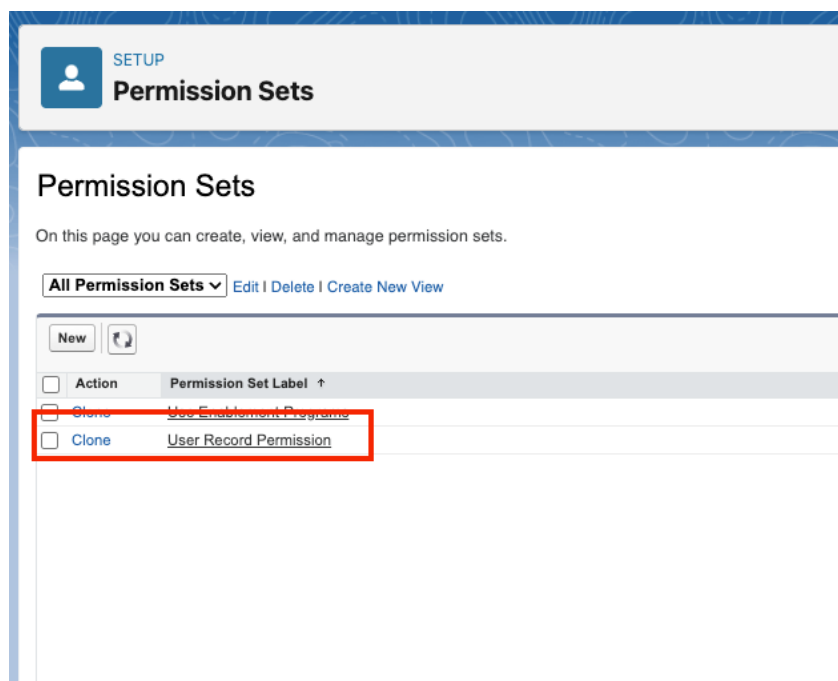
The component works with any Salesforce object and can be deployed on Lightning home, app and record pages as well as screen utility bar.

Considerations

This document is intended for users who are new to the User Record Permission but have knowledge of using Salesforce from a user perspective (for example: can login, search and navigate the user interface, create and update records, view reports, etc).

Required User Permissions

To use this guide, you must have access to a Salesforce environment with the User Record Permission installed. You will also need to have the permission set User Record Permission assigned.





User Interface

User Record Permission contains 2 interactive UI. One for Record page and another for Home Page, App Page and Utility Bar, which we will be covering in more detail within this guide.

Record Page

It offers an easy-to-use interface; it consists of a user search which allows a user to be selected and the component is responsible for loading the accesses of that user corresponding to the record where the component is located.

The screenshot displays the 'User Record Permissions' page for the account 'Burlington Textiles Corp of America'. The interface includes a top navigation bar with a search field and various utility icons. Below the navigation bar, the account details are shown, including the account owner 'edward tejada'. The main section is titled 'User Record Permissions' and features a search bar with 'Cristiano Ronaldo' entered. Below the search bar, there are tabs for 'Record Access', 'Sharing Setting', and 'Permission Detail'. The 'Record Access' tab is active, showing a table with columns 'Type' and 'Value'. The table lists various permissions such as 'Max Access Type', 'All', 'Read', 'Edit', 'Delete', and 'Transfer', each with a corresponding checkbox. To the right of the table, there is an 'Activity' section with a 'Chatter' tab and a list of activities. The 'Activity' section also includes a filter dropdown and a 'Refresh' button. At the bottom of the page, there is a 'Related' section with a 'Details' tab, showing a list of related accounts and their details.

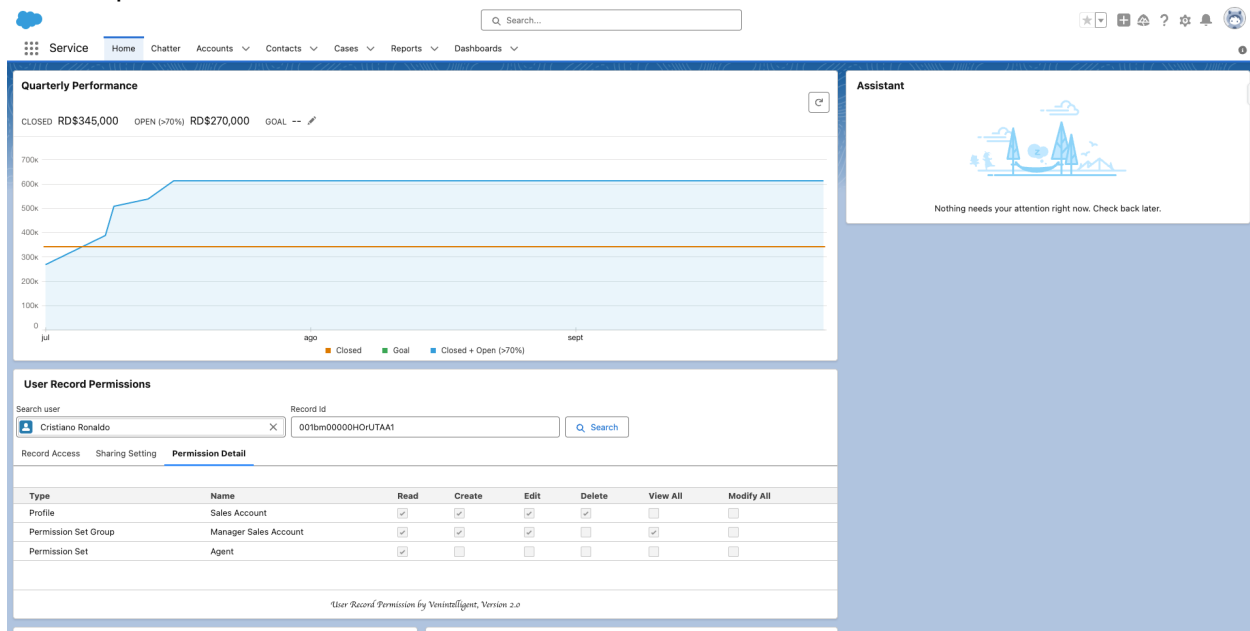
Type	Value
Max Access Type	Edit
All	☐
Read	☒
Edit	☒
Delete	☐
Transfer	☐

Related	Details
Account Owner	Rating Warm
Account Name	Phone (336) 222-7000
Parent Account	Fax (336) 222-8000



Home Page, App Page and Utility Bar

It offers an easy-to-use interface; it consists of a user search which allows you to select a user and place the Record ID of the record that we are going to consult the information. The component is responsible for loading the accesses of that user corresponding to the record that we place.



Record Access Tab

Shows the user's access to the record such as Read, Edit and Delete.

User Record Permissions	
Cristiano Ronaldo	
Record Access Sharing Setting Permission Detail	
Type	Value
Max Access Type	Edit
All	☐
Read	☒
Edit	☒
Delete	☐
Transfer	☐
User Record Permission by VeniIntelligent, Version 2.0	

Sharing Setting Tab

Shows the default sharing setting of the object where the component is located.

⚡

User Record Permission

—

🔗

User Record Permissions

Search user

Record Id

👤

Cristiano Ronaldo

×

001bm00000HOrUTAA1

🔍 Search

Record Access

Sharing Setting

Permission Detail

Type	Value
Default Internal Access	ReadWrite
Default External Access	Private

User Record Permission by Venintelligent, Version 2.0

⚡ User Record Permission

☰ To Do List

Permission Detail Tab

Shows in detail the permissions that the user contain that provide access to the record.

User Record Permissions

👤

Zaira Pena

×

Record Access

Sharing Setting

Permission Detail

Type	Name	Read	Create	Edit	Delete	View All	Modify All
Profile	Analytics Cloud Integration User	☒	☐	☐	☐	☒	☐
Permission Set	Agent	☒	☐	☐	☐	☐	☐

User Record Permission by Venintelligent, Version 2.0