Salesforce Certified Admin and App Builder

Lesson 4—Validation Rules

What You'll Learn

- Use of validation rules

- Creating and editing validation rules

- Customizing error messages
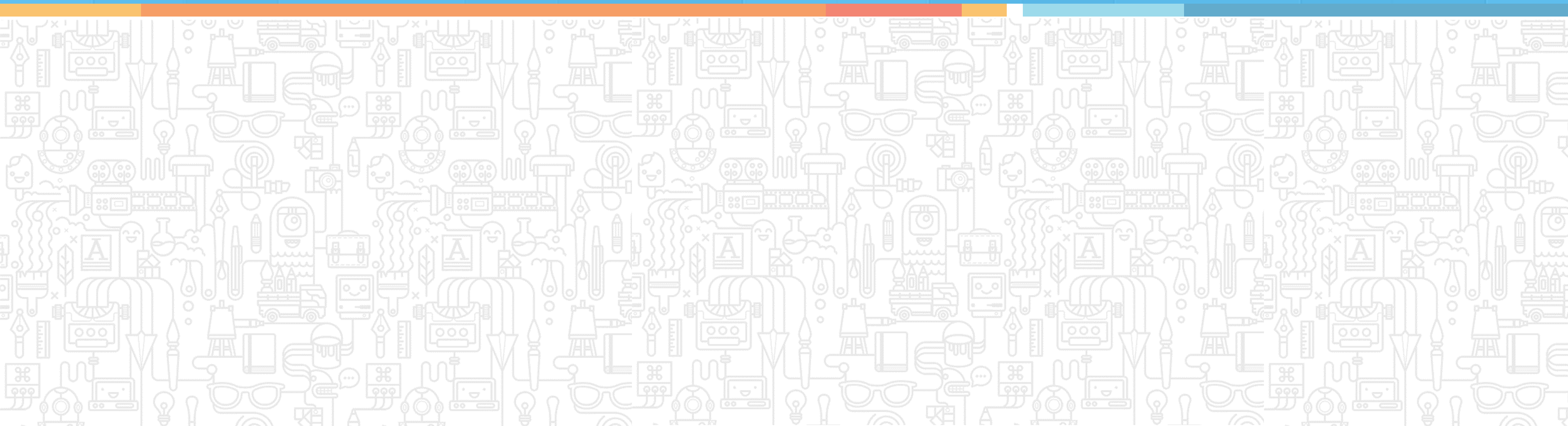
Creating Validation Rules

Validation rules are used for the following:

- To enforce field requirements based on business logic.

- Not intended to replace the required field option on page layouts.

- For selective scenarios when a field may or may not be required, based on values from other fields.

Validation Rule

Rule Name	New_Account_Rule
Active	☑
Description	The purpose of this validation rule is to ensure all required fields have been populated.

Creating Formulas

Keep in mind the following points:

- Salesforce uses proprietary formulas for

  validation rules.

- The rule will stop a user from saving if the

  formula evaluates to TRUE.

- Formulas can be grouped logically and can

  evaluate many fields.

- There is a character compilation limit of 5,000

```
1    AND(
2   ISBLANK(AccountNumber),
3   NOT(ISNUMBER(AccountNumber))
4  )
```

Creating Error Messages

Keep in mind the following points about error messages:

- The more informative the message, the more likely users are to resolve their data error.

- Messages can be placed at the top of the record or below the field in question.

- Messages can have links to outside resources such as a training video.

Error Message

Example: Discount percent cannot exceed 30%

This message will appear when Error Condition formula is **true**

Error Message: Please remove any letters from the phone number field before continuing.

Error Location: ⦿ Top of Page ○ Field ℹ

Quiz

QUIZ 1

Where can error messages be posted?

a.   Knowledge Base

b.   Reports

c.   Below fields

d.   Bottom of the page

QUIZ 1

Where can error messages be posted?

a. Knowledge Base

b. Reports

c. Below fields

d. Bottom of the page

The correct answer is c.

Error messages can be posted below fields or at the top of the page.

QUIZ 2

What function can be used with picklist fields?

a. ISPICKVAL

b. DATEVALUE

c. IF

d. AND

What function can be used with picklist fields?

a. ISPICKVAL

b. DATEVALUE

c. IF

d. AND

The correct answer is **a**.

The ISPICKVAL function is the only one that can be used with picklist fields.

QUIZ 3

Validation rules are best suited for which of the following scenarios?

a. Making all fields on the page layout required at all times

b. Making some fields required based on other field values

c. Send email messages

d. Validate report data

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QUIZ 3

Validation rules are best suited for which of the following scenarios?

a.   Making all fields on the page layout required at all times

b.   Making some fields required based on other field values

c.   Send email messages

d.   Validate report data

The correct answer is **b**.

Validation rules are best used to selectively enforce required fields and required field values.

QUIZ 4

Where are validation rules created?

a. Objects

b. Reports

c. Lists

d. Apex

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QUIZ 4

Where are validation rules created?

a. Objects

b. Reports

c. Lists

d. Apex

The correct answer is **a**.

Validation rules are created on objects, such as accounts and contacts, as well as all custom objects.

When are validation rules best utilized?

a.   To ensure a Closed Won Opportunity has an amount filled in

b.   To make the email field required on Contacts at all times

c.   To ensure there are no duplicate Leads

d.   To ensure compliance requirements are being met in emails

QUIZ 5

When are validation rules best utilized?

a. To ensure a Closed Won Opportunity has an amount filled in

b. To make the email field required on Contacts at all times

c. To ensure there are no duplicate Leads

d. To ensure compliance requirements are being met in emails

The correct answer is **a**.

The best use case for validation rules is to ensure a Closed Won Opportunity has an amount filled in.

Case Study

Case Study

Scenario | Analysis | Solution

United Containers is having a tough time enforcing sales record integrity when opportunities are closed. The correct start dates and amounts are not being populated even after the sale is closed. Sales operations team is forced to ask the individual salespeople for this information. This requires additional hours and effort on the part of the sales department. United Containers needs a way to require certain fields on opportunities based on opportunity stage.

*Click **Analysis** to know the team's next move.*

Scenario Analysis Solution

United Containers decided to implement validation rules for the following reasons:

1. The Amount, Contract Start Date, and Type fields can be made required when an Opportunity is Closed Won.

2. The salespeople aren't required to fill in those fields until the opportunity is actually won.

3. Error messages can help guide users to fill in the proper fields without having to guess.

*Click **Solution** to know the company's decision.*

Scenario **Analysis** **Solution**

The System Administrator of United Containers took the following steps:

1. A new validation rule was created on the Amount field on Opportunities.

2. A new validation rule was created on the Type field on Opportunities.

3. Two error messages were created to inform users of their data entry error.

Proceed forward to view the demo.

Key Takeaways

- Validation rules are a fast way to maintain data integrity.

- Validation rules are available on any object.

- Useful error messages can reduce user frustration.

This concludes 'Validation Rules.'

The next Lesson is 'Workflow Rules.'