Hierarchy Custom Setting in Validation Rules

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Introduction

According to Salesforce Help:

> *Validation rules verify that the data a user enters in a record meets the standards you specify before the user can save the record. A validation rule can contain a formula or expression that evaluates the data in one or more fields and returns a value of "True" or "False". Validation rules also include an error message to display to the user when the rule returns a value of "True" due to an invalid value.*

and:

> *Hierarchy Custom Settings is a type of custom setting that uses a built-in hierarchical logic that lets you "personalize" settings for specific profiles or users. The hierarchy logic checks the organization, profile, and user settings for the current user and returns the most specific, or "lowest," value. In the hierarchy, settings for an organization are overridden by profile settings, which, in turn, are overridden by user settings.*

When to use?

You have Validation Rules which have to be customized based on Profile or User. Because of that, you had to hard code Names and Id's. That's a bad practice!

Example:

Users should be prevented from changing the Stage after the Opportunity has been closed. Only System Administrators and one User should bypass the Validation Rule.

Opportunity Validation Rule

Validation Rule Detail

Edit   Clone

Rule Name	Cannot_Change_Stage_After_Close	Active	✓

Error Condition Formula
```
AND (
ISCHANGED( StageName ),
PRIORVALUE( IsClosed ) = TRUE,
IsClosed = FALSE,
$Profile.Name != "System Administrator",
$User.Id != "0051r000008rCHhAAM"
)
```

Error Message	You cannot change the Stage, if the Opportunity is already Closed.	Error Location	Top of Page
Description	Users are prevented from changing the Stage after the Opportunity has been closed.		

Solution

Instead of hard coding Profile or User Names, Id's, you need to configure a Hierarchy Custom Setting.

Configure Hierarchy Custom Setting (in Lightning Experience)

- Go to Setup -> Custom Code -> Custom Settings.
- Create new Hierarchy Custom Setting.

Custom Setting Definition

Save   Cancel

Label	Validation Rule Configuration
Object Name	VRConfiguration
Setting Type	Hierarchy ▾
Visibility	Public ▾
Description	Configuration for bypassing Validation Rules

Save   Cancel