Keep Clean Validation Rules with Custom Settings
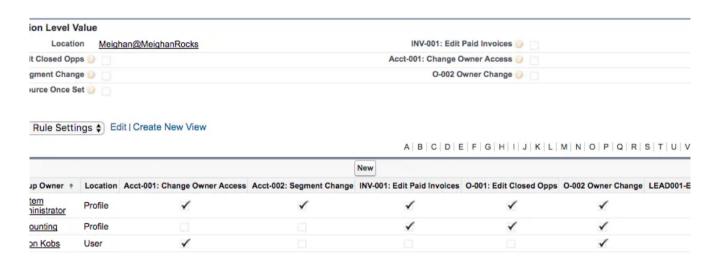

Let's talk about managing Validation Rules.How many of you have or have had Validation rules in your org that looks like this:

```
AND(
PRIORVALUE( IsClosed ) = TRUE,
 OR(
  $Profile.Name != "System Adminstrator",
  $Profile.Id != "00eo0000000KXdC",
  $User.Id != "005o00000040J3f")
)
```

Well doesn't that look lovely. Anyone else see red flags here?

1. First off, Administrator is misspelled. (rookie mistake)

2. What profile IS that? (I hate Ids sometimes)
3. Who is that user that doesn't have to follow validation rules? (Are they even Active?)
4. All of this is done on a per rule basis, eww! That mean you need to check each one to see who can do what, yuck!

My personal validation rule number 1 is:

Do not over complicate rules

Followed closely by rule number 2:

Validation rule exclusions and bypass rights **should <u>not</u> include Ids.**

That's right, I said they shouldn't include Ids, and based on my example, they shouldn't include names either. If you made that assumption, you have assumed correctly. I use a hierarchy Custom Setting to grant bypass rights to Validation Rules all in one place, with a single line added to each rule, easy peasy. Here is how we do it.

What are Custom Settings

First off what is a custom setting? A custom setting is similar t a custom object, it has custom fields that hold data that is accessible in your org. The data in Custom Settings is cached, meaning it does not have to use SOQL queries that count against governor limits.

List: A custom setting that provides a reusable set of static data, accessed across your organization. That means it's like a custom object. You have a series of records with fields It's just data in list. It does not vary with profile or user, and there aren't security settings so it is available organization-wide.

Hierarchy: A custom setting that uses a built-in hierarchical logic that lets you "personalize" settings for specific profiles or users. What it does is it checks the organization level then the profile then the user. The lowest value is returned, so if you have a user level record, then that user's value is returned but if there isn't a value for the user but there is for their profile then, the profile value is used, otherwise it defaults to the organization level.

Only Hierarchy Custom Settings are available in Workflow Rules and Validation Rules, so that's what we will use today.

Configure Your Setting

1. To access custom settings, you go to **Setup – Develop – Custom Settings**. Don't let the fact that they are in the develop section scare you, this is configuration you got this.
2. We are working with a Hierarchy Custom Setting here, and you want to make sure to add a Description.

- For each Validation Rule you need to grant bypass rights to, you will need to create a checkbox field. From the Custom Setting select New in the Custom Fields section

- Select Checkbox as the field type and next

- Personally, I like to add a link to the Validation Rule in the Description and Help Text to make my life easier. i also explain what rights are granted when checked in the Help text The default value is Unchecked.

- To use the field in a validation rule, access the Validation Rule you want to grant bypass rights to.
- Click Edit and above the formula box click "Insert Field"

Find

- Find your Validation Rule custom setting it will start with $Setup.VRS__c (or whatever name you used).
- Then select your field for the checkbox created to bypass this specific rule on the right.

```
AND(
  PRIORVALUE( IsClosed ) = TRUE,
  $Setup.meighanrocks__VRS__c.meighanrocks__O_001_Edit_Closed_Opps__c = False)
```

And that's it! You can now check that checkbox to grant bypass rights to everyone assigned the profiles you select or the specific users you select in the custom setting with one little line. How clean is that?

Management

- Once you have your fields created for the Validation Rules you want to override, you can access the ability to configure your settings by clicking "Manage"

- The Manage button will bring you to the actual settings for your Custom Setting.
- The top of the screen displays your default org settings, click edit and then save with all the checkboxes unchecked if you'd like the check it out. Since checked means the user can bypass the rule, we don't want any of these checked by default.

Custom Setting

Validation Rule Settings

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing code.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether a specific user is running the app, a specific profile, or just a general user.

Edit   Delete

▼ Default Organization Level Value

Location	Meighan@MeighanRocks	
O-001: Edit Closed Opps ☐	INV-001: Edit Paid Invoices ☐	
Acct-002: Segment Change ☐	Acct-001: Change Owner Access ☐	
LEAD001-Edit Lead Source Once Set ☐	O-002 Owner Change ☐	

These are your default Org settings

View: [All Validation Rule Settings ⇕] Edit | Create New View

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | Al

New

Action	Setup Owner ↑	Location	Acct-001: Change Owner Access	Acct-002: Segment Change	INV-001: Edit Paid Invoices	O-001: Edit Closed Opps	O-002 Owner Change	LEAD001-Edit Lead Source Once Set
View	Edit	Del	System Administrator	Profile	✓	✓	✓	✓	✓	
View	Edit	Del	Accounting	Profile	☐	☐	✓	✓	✓	
View	Edit	Del	Jason Kobs	User	✓	☐	☐	☐	✓	
View	Edit	Del	Meighan Brodkey	User	☐	✓	☐	☐	☐	✓

- Below the Org Defaults are the Settings you will configure to bypass the Validation Rules.
- Now, there are 3 levels to Hierarchy Custom Settings, the Org Level, the Profile Level, then User Level. The Bypass rights are based on the lowest level for that user, so…
- I will have the ability to bypass the rule and edit Closed Opps with the Sys Admin profile if the Profile has Edit Closed Opps access, and I do not have any lower level, User Level, permissions in this setting.
- Since I have user specific bypass access in the image below, but my user does NOT have Edit closed Opps, I will not be able to bypass the Edit Closed Opps Validation Rule. The lowest level setting is used.

Validation Rule Settings

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing cod

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether a specific user app, a specific profile, or just a general user.

Edit | Delete

▼ **Default Organization Level Value**

Location	Meighan@MeighanRocks	INV-001: Edit Paid Invoices ⓘ ☐	
O-001: Edit Closed Opps ⓘ ☐		Acct-001: Change Owner Access ⓘ ☐	
Acct-002: Segment Change ⓘ ☐		O-002 Owner Change ⓘ ☐	
LEAD001-Edit Lead Source Once Set ⓘ ☐			

View: [All Validation Rule Settings ⬍] Edit | Create New View

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X

New

Action	Setup Owner ↑	Location	Acct-001: Change Owner Access	Acct-002: Segment Change	INV-001: Edit Paid Invoices	O-001: Edit Closed Opps	O-002 Owner Change	LEAD001-Edit Lead
View | Edit | Del	System Administrator	Profile	✓	✓	✓	✓	✓	
View | Edit | Del	Accounting	Profile	☐	☐	✓	✓	✓	
View | Edit | Del	Jason Kobs	User	✓	☐	☐	☐	✓	
View | Edit | Del	Meighan Brodkey	User	✓	✓	✓	☐	✓	✓

- But here I granted the Meighan Brodkey User Edit Closed Opps access and now I do have bypass rights on Closed Opportunities

Validation Rule Settings

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing cod

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether a specific user app, a specific profile, or just a general user.

[Edit] [Delete]

▼ **Default Organization Level Value**

Location	Meighan@MeighanRocks
O-001: Edit Closed Opps ⬤ ☐	INV-001: Edit Paid Invoices ⬤ ☐
Acct-002: Segment Change ⬤ ☐	Acct-001: Change Owner Access ⬤ ☐
LEAD001-Edit Lead Source Once Set ⬤ ☐	O-002 Owner Change ⬤ ☐

View: [All Validation Rule Settings ⬍] Edit | Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X

[New]

Action	Setup Owner ↑	Location	Acct-001: Change Owner Access	Acct-002: Segment Change	INV-001: Edit Paid Invoice	O-001: Edit Closed Opps	O-002 Owner Change	LEAD001-Edit Lead
View | Edit | Del	System Administrator	Profile	✔	✔	✔	✔	✔	
View | Edit | Del	Accounting	Profile	☐	☐	✔	✔	✔	
View | Edit | Del	Jason Kobs	User	✔	☐	☐	☐	✔	
View | Edit | Del	Meighan Brodkey	User	✔	✔	✔	✔	✔	✔