

Keep Clean Validation Rules with Custom Settings

ion Level Value

Location Meighan@MeighanRocks

INV-001: Edit Paid Invoices ☐

it Closed Opps ☐

Acct-001: Change Owner Access ☐

gment Change ☐

O-002 Owner Change ☐

urce Once Set ☐

Rule Settings

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

Op 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-E
tem inistrator	Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
ounting	Profile	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
on Kobs	User	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

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 != "005o000000040J3f")
)
```

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 not 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.

Custom Setting Definition Edit

New Custom Setting Definition



Tip: Use Custom Metadata Types for App Configuration

If you're thinking of using list custom settings, consider using custom metadata types instead. You can migrate the records of custom metadata types using packages or Metadata API tools.

Custom Setting Definition Save Cancel

Label

Validation Rule Settings

Object Name

VRS i

Setting Type

Hierarchy + i

Visibility

Public i

Description

Used to grant bypass access to validation rules by Profile and User

Save Cancel

- 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

salesforce

Search...

Search apex, object, list

Service

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Quick Find / Search...

Select Metadata:

Apex Classes (1398)

Advanced Search

Expand All | Collapse All

Lightning Experience

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Administer

- Manage Users
- Manage Apps
- Manage Territories
- Company Profile
- Security Controls
- Domain Management
- Communication Templates
- Translation Workbench
- Data Management

organization

Custom Setting Definition

Validation Rule Settings

Create the fields for your custom setting. The data in these fields are cached with the application.

Custom Setting Definition Detail

Edit Delete Manage

Label	Validation Rule Settings	Object Name	VRS
API Name	meighanrocks__VRS__c	Setting Type	Hierarchy
Visibility	Public	Description	Give override to vrs on user by user and profile by profile basis.
Namespace Prefix	meighanrocks	Created Date	1/13/2016 7:08 PM
Last Modified Date	3/15/2016 8:35 PM	Record Size	160

Custom Fields

New

Action	Field Label	API Name	Data Type	Indexed	Modified By
Edit Del	Acct-001: Change Owner Access	meighanrocks__Acct_001_Change_Owner_Access__c	Checkbox		Meighan Brodsky, 4/26/2017 6:51 PM
Edit Del	Acct-002: Segment Change	meighanrocks__Acct_002_Segment_Change__c	Checkbox		Meighan Brodsky, 4/26/2017 6:47 PM
Edit Del	INV-001: Edit Paid Invoices	meighanrocks__INV_001_Edit_Paid_Invoices__c	Checkbox		Meighan Brodsky, 3/15/2016 8:42 PM
Edit Del	LEAD001: Edit Lead Source Once Set	meighanrocks__LEAD001_Edit_Lead_Source_Once_Set__c	Checkbox		Meighan Brodsky, 4/26/2017 7:07 PM
Edit Del	Q-001: Edit Closed Opps	meighanrocks__Q_001_Edit_Closed_Opps__c	Checkbox		Meighan Brodsky, 3/15/2016 8:39 PM
Edit Del	Q-002: Owner Change	meighanrocks__Q_002_Owner_Change__c	Checkbox		Meighan Brodsky, 3/15/2016 8:41 PM

- Select Checkbox as the field type and next

Validation Rule Settings
New Custom Field

Step 1. Choose the field type

Specify the type of information that the custom field will contain.

Data Type

- ☐ None Selected
- ☒ Checkbox
- ☐ Currency
- ☐ Date
- ☐ DateTime
- ☐ Email
- ☐ Number
- ☐ Percent
- ☐ Phone
- ☐ Text

- 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.

Edit Validation Rule Settings Custom Field
O-001: Edit Closed Opps

Custom Field Definition Edit

Field Information

Field Label: O-001: Edit Closed Opps

Field Name: O_001_Edit_Closed_Opps

Namespace Prefix: meghanrocks

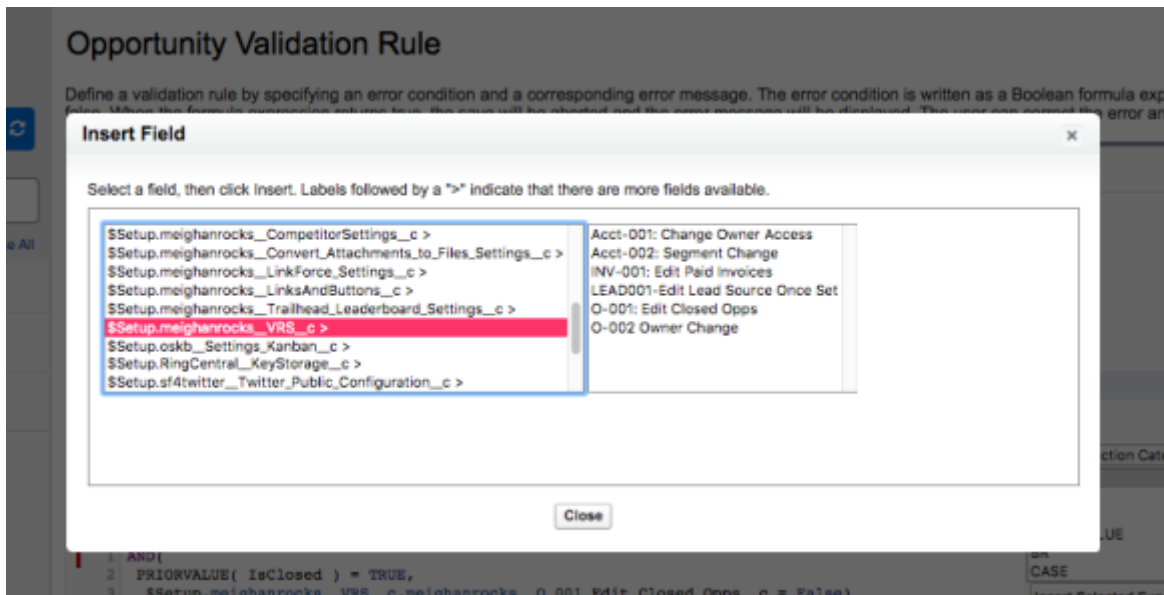
Description: VR: https://na17.salesforce.com/03do000000BToo?setupid=OpportunityValidations

Help Text: True if the user/profile can edit closed opps. VR: https://na17.salesforce.com/03do000000BToo?setupid=OpportunityValidations

General Options

Default Value: ☐ Checked ☒ 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 screenshot shows the Salesforce 'Custom Setting Definition' page for 'Validation Rule Settings'. The 'Manage' button is highlighted with a red box. The page displays the following details:

Custom Setting Definition Detail		Object Name
Label	Validation Rule Settings	VRS
API Name	meighanrocks__VRS__c	Setting Type
Visibility	Public	Description
Namespace Prefix	meighanrocks	Created Date
Last Modified Date	3/15/2016 8:35 PM	Record Size

Custom Fields					
Action	Field Label	API Name	Data Type	Indexed	Modified By
Edit Del	Acct-001: Change Owner Access	meighanrocks__Acct_001_Change_Owner_Access__c	Checkbox		Meighan Brodsky, 4/26/2017 6:51 PM
Edit Del	Acct-002: Segment Change	meighanrocks__Acct_002_Segment_Change__c	Checkbox		Meighan Brodsky, 4/26/2017 8:47 PM
Edit Del	INV-001: Edit Paid Invoices	meighanrocks__INV_001_Edit_Paid_Invoices__c	Checkbox		Meighan Brodsky, 3/15/2016 8:42 PM
Edit Del	LEAD001: Edit Lead Source Once Set	meighanrocks__LEAD001_Edit_Lead_Source_Once_Set__c	Checkbox		Meighan Brodsky, 4/26/2017 7:07 PM
Edit Del	O-001: Edit Closed Opps	meighanrocks__O_001_Edit_Closed_Opps__c	Checkbox		Meighan Brodsky, 3/15/2016 8:39 PM
Edit Del	O-002: Owner Change	meighanrocks__O_002_Owner_Change__c	Checkbox		Meighan Brodsky, 3/15/2016 8:41 PM

- 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.

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	<u>Meighan@MeighanRocks</u>	INV-001: Edit Paid Invoices <input type="checkbox"/>	
O-001: Edit Closed Opps <input type="checkbox"/>		Acct-001: Change Owner Access <input type="checkbox"/>	
Acct-002: Segment Change <input type="checkbox"/>		O-002 Owner Change <input type="checkbox"/>	
LEAD001-Edit Lead Source Once Set <input type="checkbox"/>			

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](#)

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 Kobe	User	✓	□	□	□	✓	
View Edit Del	Meighan Brockway	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 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, 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 Source Once Set	
View Edit Del	System Administrator	Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
View Edit Del	Accounting	Profile	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
View Edit Del	Jason Kobs	User	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
View Edit Del	Meighan Brodkey	User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>

- 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 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, app, a specific profile, or just a general user.

Edit Delete

▼ Default Organization Level Value

Location	Meighan@MeighanRocks	INV-001: Edit Paid Invoices	<input type="checkbox"/>
O-001: Edit Closed Opps	<input type="checkbox"/>	Acct-001: Change Owner Access	<input type="checkbox"/>
Acct-002: Segment Change	<input type="checkbox"/>	O-002 Owner Change	<input type="checkbox"/>
LEAD001-Edit Lead Source Once Set	<input type="checkbox"/>		

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 Source Once Set	
View Edit Del	System Administrator	Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
View Edit Del	Accounting	Profile	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
View Edit Del	Jason Kobs	User	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
View Edit Del	Meighan Brockley	User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>