Phase 4

This phase discusses about the Validation Rules, Matching Rules, Duplicate Rules, Flows and E mail alerts implemented in the project

SHELF SYNC LIBRARY

❖ Validation Rules :

BOOK

❖ **Book Name Validation :** This Validation rule will be used to check whether the entered book name is correct and does not have any numerals.

Screenshot :

❖**Book Stock Validation :** This validation rule checks whether the book stock lies within a certain range to enter the book record into the database.

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Book Validation Rule

Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean the save will be aborted and the error message will be displayed. The user can correct the error and try again.

Validation Rule Edit   Save   Save & New   Cancel

Rule Name   Stock_Numeric_Validation

Active   ☑

Description Check the amount of stock entered.

Error Condition Formula

Example: Discount_Percent__c>0.30   More Examples...

Display an error if Discount is more than 30%

If this formula expression is **true**, display the text defined in the Error Message area

Insert Field   Insert Operator ▼

OR(Stock__c > 500, Stock__c < 10)

Functions

-- All Function Categories -- ▼

ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

Insert Selected Function

ABS(number)
Returns the absolute value of a
number, a number without its sign

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

If this formula expression is **true**, display the text defined in the Error Message area

Insert Field   Insert Operator ▼

OR(Stock__c > 500, Stock__c < 10)

-- All Function Categories -- ▼

ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

Insert Selected Function

ABS(number)
Returns the absolute value of a
number, a number without its sign

Help on this function

Check Syntax

Error Message

Example: Discount percent cannot exceed 30%

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

Error Message Stock must be between 10 and 500.

This error message can either appear at the top of the page or below a specific field on the page

Error Location ○ Top of Page ● Field Stock ▼ ⓘ

Save   Save & New   Cancel

These are the two validation rules on book object :

MEMBER

❖**Name Validation :** Checking whether the name of the entered member is correct and does not have any numbers in it.

❖**Phone Validation :** Checking whether the phone number has length equals to 10 and does not have any alphabets.

Member Validation Rule

Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean formula expression that returns true or false. When the formula expression returns true, the save will be aborted and the error message will be displayed. The user can correct the error and try again.

Validation Rule Edit   Save   Save & New   Cancel

Rule Name   Member_Phone_Validation
Active   ☑
Description Validate the phone number.

Error Condition Formula

Example: Discount_Percent__c>0.30   More Examples...
Display an error if Discount is more than 30%
If this formula expression is **true**, display the text defined in the Error Message area

Insert Field   Insert Operator ▼

```
OR(REGEX( Mobile_Number__c , ".*[A-Za-z].*"),
LEN( Mobile_Number__c ) <> 10)
```

Functions
-- All Function Categories -- ▼
ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

Insert Selected Function

ABS(number)
Returns the absolute value of a number, a number without its sign

---

If this formula expression is **true**, display the text defined in the Error Message area

Insert Field   Insert Operator ▼

```
OR(REGEX( Mobile_Number__c , ".*[A-Za-z].*"),
LEN( Mobile_Number__c ) <> 10)
```

-- All Function Categories -- ▼
ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

Insert Selected Function

ABS(number)
Returns the absolute value of a number, a number without its sign

Help on this function

Check Syntax   No errors found

Error Message

Example: Discount percent cannot exceed 30%
This message will appear when Error Condition formula is **true**

Error Message   Check the phone number and try again !!
(Phone number can't have characters)

This error message can either appear at the top of the page or below a specific field on the page

Error Location   ○ Top of Page   ⦿ Field Mobile Number ▼ ⓘ

Save   Save & New   Cancel

❖ **Matching and Duplicate Rules :**

• Creating matching rules for the book and the member records :

Edit Rule Check_Book_Duplicate

Save   Cancel

Rule Details

Object	Book
Rule Name	Check_Book_Duplicate
Unique Name	Check_Book_Duplicate [i]
Description	No Duplicate books.

Matching Criteria

Tell the rule which fields to compare and how.

Field	Matching Method [i]	Match Blank Fields [i]	
Book Title ⌄	Exact ⌄	☑	AND
--None-- ⌄	Exact ⌄	☐	AND
--None-- ⌄	Exact ⌄	☐	AND
--None-- ⌄	Exact ⌄	☐	AND
--None-- ⌄	Exact ⌄	☐	

Add Filter Logic...

Save   Cancel

- After creating the matching rules now create duplicate rules and assign the respective matching rules to them

Q duplicate

∨ Data
  ∨ **Duplicate** Management
      Duplicate Error Logs
      Duplicate Rules
      Matching Rules

Didn't find what you're looking for?
Try using Global Search.

SETUP
Duplicate Rules

Rule Details

Rule Name	Check_Book_Duplicates
Description	
Object	Book
Record-Level Security	○ Enforce sharing rules ℹ
	● Bypass sharing rules

Actions

Specify what happens when a user tries to save a duplicate record.

Action On Create	Block ⌄
Action On Edit	Block ⌄
Alert Text	Duplicate Error !! ℹ

Matching Rules

Define how duplicate records are identified.

Compare Books With	Books ⌄
Matching Rule	Check_Book_Duplicate ⌄
Matching Criteria	Book: Name EXACT MatchBlank = TRUE
Field Mapping	✓ Mapping Selected

[Add Rule] [Remove Rule]

Rule Details

Rule Name	Check_Member_Duplicates
Description	
Object	Member
Record-Level Security	○ Enforce sharing rules ⓘ ⦿ Bypass sharing rules

Actions

Specify what happens when a user tries to save a duplicate record.

Action On Create	Block ▾
Action On Edit	Block ▾
Alert Text	Duplicate Error !! ⓘ

Matching Rules

Define how duplicate records are identified.

Compare Members With	Members ▾
Matching Rule	Member_Duplicate ▾
Matching Criteria	(Member: Name EXACT MatchBlank = FALSE) OR (Member: Email_ID EXACT MatchBlank = FALSE) OR (Member: Mobile_Number EXACT MatchBlank = FALSE)
Field Mapping	✅ Mapping Selected

Book Duplicate Rule
Check_Book_Duplicates

Help for this Page ❓

Duplicate Rule Detail

| Edit | Delete | Clone | Deactivate |

Rule Name	Check_Book_Duplicates	Order	1 of 1 [Reorder] ⓘ
Description			
Object	Book		
Record-Level Security	Bypass sharing rules		
Action On Create	Block	Operations On Create	☐ Alert ☐ Report
Action On Edit	Block	Operations On Edit	☐ Alert ☐ Report
Alert Text	Duplicate Error !!		
Active	✓		
Matching Rule	✅ Check_Book_Duplicate ✅ Mapped	Matching Criteria	Book: Name EXACT MatchBlank = TRUE
Conditions			
Created By	Vedant Kshirsagar, 9/23/2025, 5:09 AM	Modified By	Vedant Kshirsagar, 9/23/2025, 5:09 AM

| Edit | Delete | Clone | Deactivate |

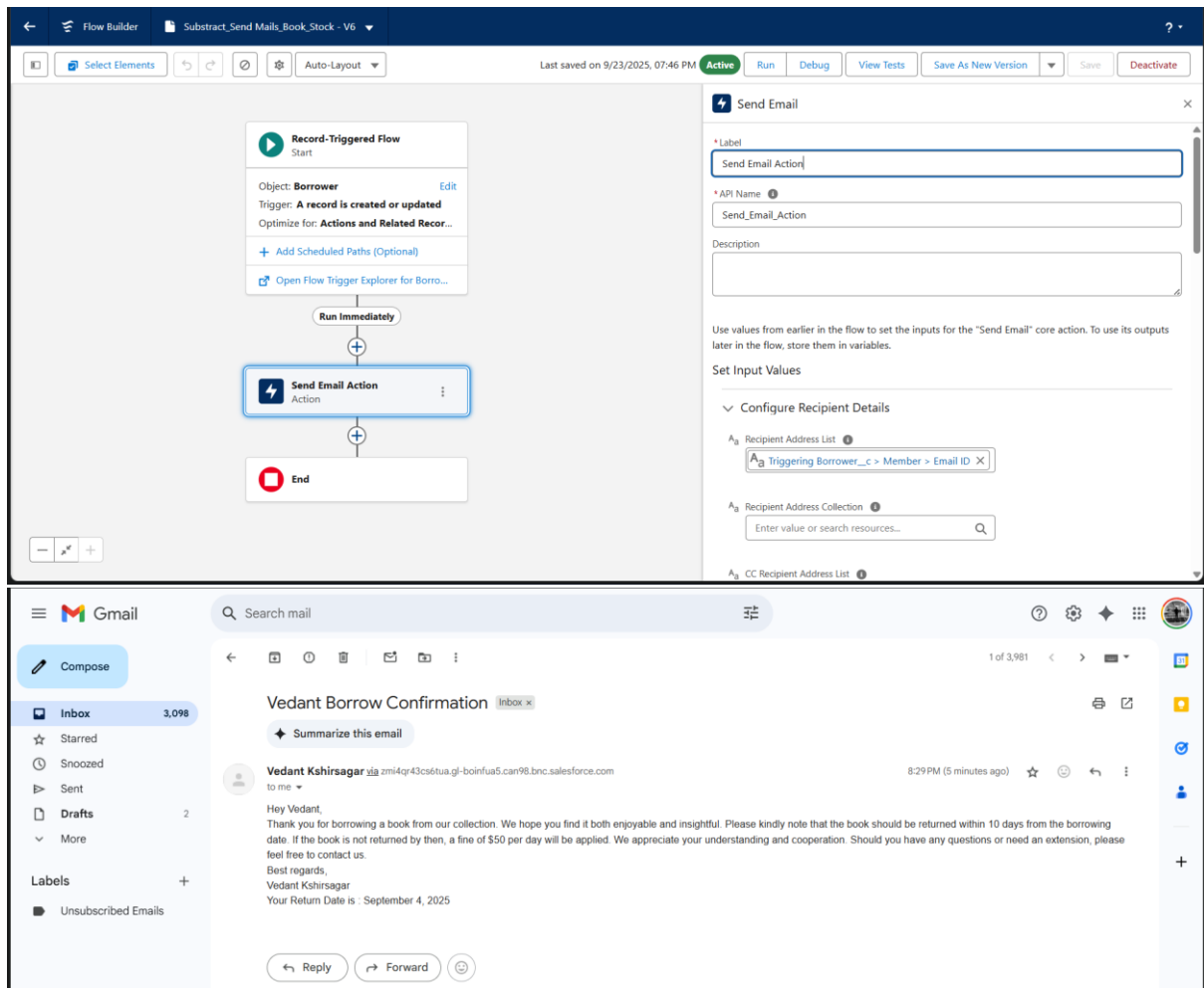- **Flows :**

Creating Flows for :

1. Reducing the stock of the book by 1 when the book is borrowed
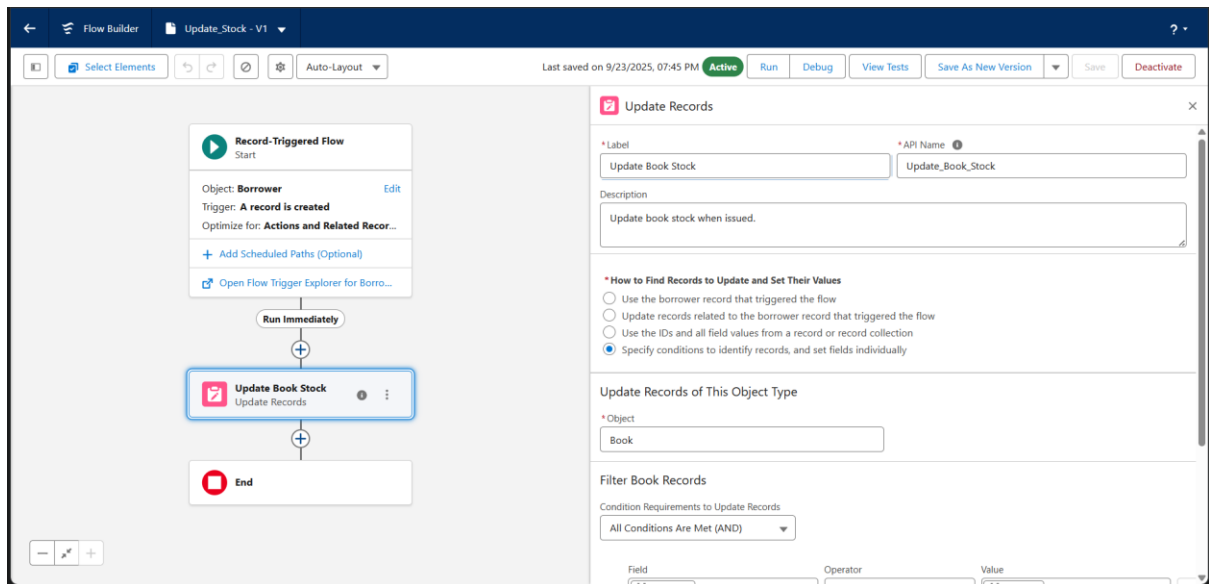
2. Creating a flow to generate the bill records when the fine is due in the borrower object and goes above 50 dollars.
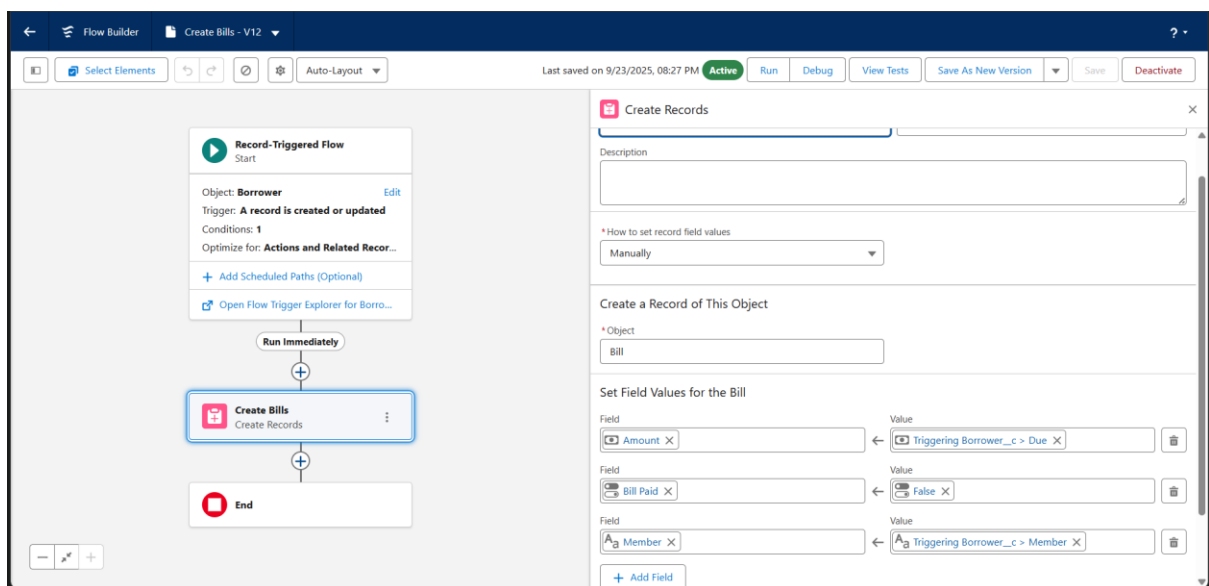
3. Creating a flow to send mails of confirmation to the book borrowers

The above screenshot shows the confirmation on the mails being sent to the borrower with the return date mention in it, with the borrowers name also.