

# 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 :

The screenshot shows the 'Book Validation Rule' configuration page in Salesforce. The left sidebar contains a navigation menu with options: 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, and Triggers. The main content area is titled 'Book Validation Rule' and includes a description: '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.' Below this is the 'Validation Rule Edit' section with fields for 'Rule Name' (Book\_Name\_Validation), 'Active' (checked), and 'Description' (Validates that book names do not contain numbers or is empty.). The 'Error Condition Formula' section shows an example formula: 'REGEX (Name, "[0-9].\*")' and a list of functions including ABS, ACOS, ADDMONTHS, AND, ASCII, and ASIN.

SETUP > OBJECT MANAGER  
**Book**

**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:

Active: ☒

Description:

**Error Condition Formula**

**Example:**  [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

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

REGEX (Name, "[0-9].\*")

Check Syntax

-- 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](#)

**Error Message**

**Example:** Discount percent cannot exceed 30%

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

Error Message Book name cannot contain numbers !!

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 Book Title ▼ ⓘ

Save    Save & New    Cancel

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

SETUP > OBJECT MANAGER

## Book

- 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

Active ☒

Description

**Error Condition Formula**

**Example:**  [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

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

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

SETUP > OBJECT MANAGER

## Book

- 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

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

ABS(number)  
 Returns the absolute value of a number, a number without its sign  
[Help on this function](#)

**Error Message**

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

Error Message

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

Save Save & New Cancel

These are the two validation rules on book object :

SETUP > OBJECT MANAGER

**Book**

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

**Validation Rules**  
2 Items, Sorted by Rule Name

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Book_Name_Validation	Book Title	Book name cannot contain numbers !!	✓	Vedant Kshirsagar, 9/23/2025, 3:55 AM
Stock_Numeric_Validation	Stock	Stock must be between 10 and 500.	✓	Vedant Kshirsagar, 9/23/2025, 3:57 AM

New

## MEMBER

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

SETUP > OBJECT MANAGER

**Member**

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

**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

Active ☒

Description

**Error Condition Formula**

Example: `[Discount_Percent__c > 30]`  
Display an error if Discount is more than 30% [More Examples...](#)

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

**Functions**

-- All Function Categories --

ABS  
ACOS  
ADDMONTHS  
AND  
ASCII  
ASIN

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

**Quick Tips**

- Operators & Functions

**Check Syntax**

SETUP > OBJECT MANAGER

**Member**

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

**Member Validation Rule**

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

**Error Message**

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

Error Message

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

**Check Syntax**

Save Save & New Cancel

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

[SETUP > OBJECT MANAGER](#)

## Member

**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

### 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

Active ☒

Description

---

**Error Condition Formula** ! = Required Information

**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

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

**Functions**

-- All Function Categories --

ABS

ACOS

ADDMONTHS

AND

ASCII

ASIN

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

**Quick Tips**

- Operators & Functions

## ❖ Matching and Duplicate Rules :



SETUP

## Matching Rules

### Edit Rule Check\_Book\_Duplicate

Save

Cancel

#### Rule Details

Object Book

Rule Name

Unique Name  [i](#)

Description

#### Matching Criteria


Tell the rule which fields to compare and how.

Field	Matching Method <a href="#">i</a>	Match Blank Fields <a href="#">i</a>	
<input type="text" value="Book Title"/> ▼	<input type="text" value="Exact"/> ▼	<input checked="" type="checkbox"/>	AND
<input type="text" value="--None--"/> ▼	<input type="text" value="Exact"/> ▼	<input type="checkbox"/>	AND
<input type="text" value="--None--"/> ▼	<input type="text" value="Exact"/> ▼	<input type="checkbox"/>	AND
<input type="text" value="--None--"/> ▼	<input type="text" value="Exact"/> ▼	<input type="checkbox"/>	AND
<input type="text" value="--None--"/> ▼	<input type="text" value="Exact"/> ▼	<input type="checkbox"/>	

[Add Filter Logic...](#)

Save

Cancel



SETUP

Matching Rules

## Edit Rule Member\_Duplicate

Save

Cancel

### Rule Details

Object

Member

Rule Name

Member\_Duplicate

Unique Name

Member\_Duplicate

?

Description

Check Reentry.

### Matching Criteria

Tell the rule which fields to compare and how.

Field	Matching Method	Match Blank Fields
1. Member Name	Exact	<input type="checkbox"/>
2. Email ID	Exact	<input type="checkbox"/>
3. Mobile Number	Exact	<input type="checkbox"/>
4. --None--	Exact	<input type="checkbox"/>
5. --None--	Exact	<input type="checkbox"/>

[Add Row](#)
[Remove Row](#)

[Clear Filter Logic](#)

Filter Logic:

1 OR 2 OR 3

[Tips](#)

?

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

Setup

Home

Object Manager

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

### All Duplicate Rules

What Are Duplicate Rules?

[ Expand ]

View: All Duplicate Rules

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

ALL

Rule Name	Description	Matching Rule	Active	Last Modified By	Last Modified Date
Standard Account Duplicate Rule	Identify accounts that duplicate other accounts.	Standard Account Matching Rule	✓	QEPIG	9/11/2025
Standard Contact Duplicate Rule	Identify contacts that duplicate other contacts and leads.	Standard Lead Matching Rule	✓	QEPIG	9/11/2025
Standard Lead Duplicate Rule	Identify leads that duplicate other leads and contacts.	Standard Contact Matching Rule	✓	QEPIG	9/11/2025

New Rule

Account

Address

Bill

Book

Borrower

Contact

Individual

Lead

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

ALL

Q duplicate

▼ Data

▼ Duplicate Management

Duplicate Error Logs

Duplicate Rules

Matching Rules

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

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SETUP

Duplicate Rules

Rule Details

Rule Name

Check\_Book\_Duplicates

Description

Object

Book

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 Books With

Books

Matching Rule

Check\_Book\_Duplicate

Matching Criteria

Book: Name EXACT MatchBlank = TRUE

Field Mapping

☒ Mapping Selected

Add Rule

Remove Rule





SETUP

## Duplicate Rules

## Rule Details

Rule Name	<input type="text" value="Check_Member_Duplicates"/>
Description	<input type="text"/>
Object	Member
Record-Level Security	<input type="radio"/> Enforce sharing rules
	<input checked="" type="radio"/> Bypass sharing rules

## Actions

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

Action On Create	<input type="text" value="Block"/>
Action On Edit	<input type="text" value="Block"/>
Alert Text	<input type="text" value="Duplicate Error !!"/>

## Matching Rules

Define how duplicate records are identified.

Compare Members With	<input type="text" value="Members"/>
Matching Rule	<input type="text" value="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	<u>Mapping Selected</u>

Book Duplicate Rule

Check\_Book\_Duplicates

Help for this Page

## Duplicate Rule Detail

[Edit](#) [Delete](#) [Clone](#) [Deactivate](#)Order 1 of 1 [[Reorder](#)] 

Rule Name	Check_Book_Duplicates		
Description			
Object	Book		
Record-Level Security	Bypass sharing rules		
Action On Create	Block	Operations On Create	<input type="checkbox"/> Alert <input type="checkbox"/> Report
Action On Edit	Block	Operations On Edit	<input type="checkbox"/> Alert <input type="checkbox"/> Report
Alert Text	Duplicate Error !!		
Active	<input checked="" type="checkbox"/>		
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](#)

Member Duplicate Rule  
Check\_Member\_Duplicates Help for this Page ?

**Duplicate Rule Detail** Edit Delete Clone Deactivate

Rule Name	Check_Member_Duplicates			Order	1 of 1 [Reorder] <span>i</span>
Description					
Object	Member				
Record-Level Security	Bypass sharing rules				
Action On Create	Block	Operations On Create	<input type="checkbox"/> Alert	<input type="checkbox"/> Report	
Action On Edit	Block	Operations On Edit	<input type="checkbox"/> Alert	<input type="checkbox"/> Report	
Alert Text	Duplicate Error II				
Active	<input checked="" type="checkbox"/>				
Matching Rule	<input checked="" type="checkbox"/> Member_Duplicate	<input checked="" type="checkbox"/> Mapped	Matching Criteria (Member: Name EXACT MatchBlank = FALSE) OR (Member: Email_ID EXACT MatchBlank = FALSE) OR (Member: Mobile_Number EXACT MatchBlank = FALSE)		
Conditions					
Created By	Vedant Kshirsagar: 9/23/2025, 5:10 AM			Modified By	Vedant Kshirsagar: 9/23/2025, 5:10 AM
<span>Edit Delete Clone Deactivate</span>					

## • Flows :

Setup Home Object Manager Search Setup Flow Trigger Explorer New Flow

Quick Find

Setup Home  
Salesforce Go  
Service Setup Assistant  
Commerce Setup Assistant  
Field Service Setup Home (Beta)  
Hyperforce Assistant  
Release Updates  
Salesforce Mobile App  
Lightning Usage  
Optimizer

**SETUP Flows**

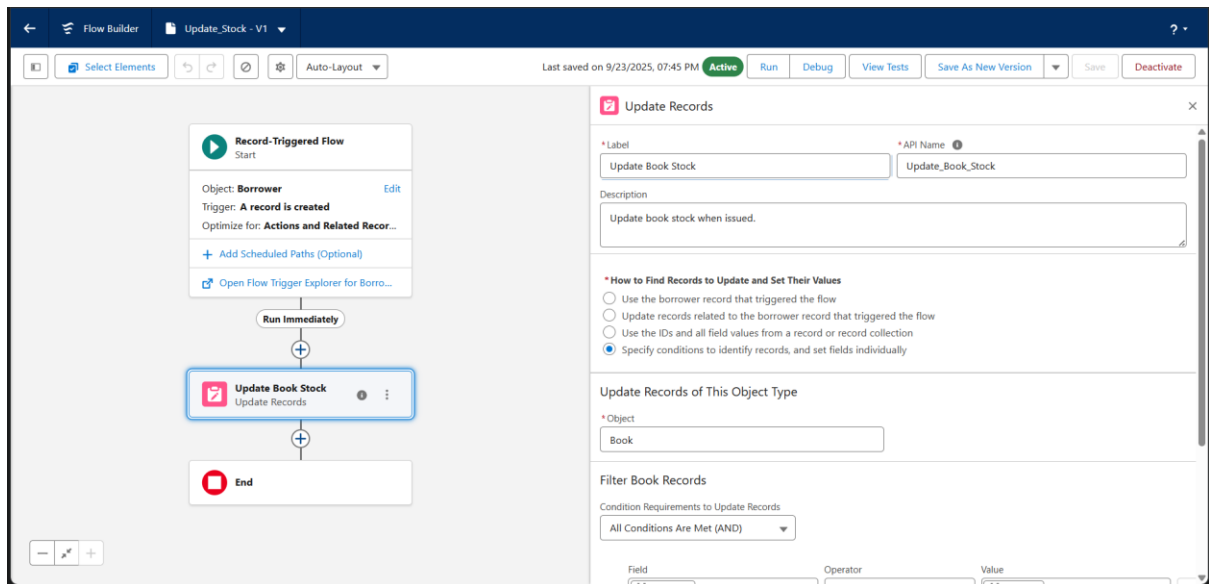
Flow Definitions  
All Flows +

3 items • Sorted by Flow Label • Filtered by All flow definitions - Last Modified By • Updated a few seconds ago

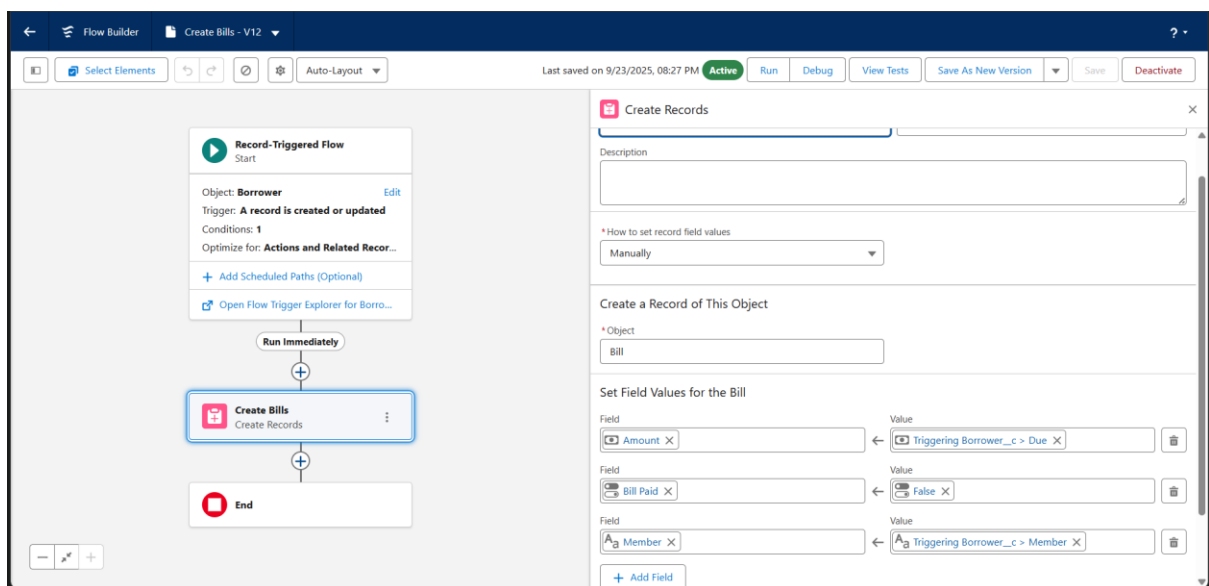
Flow Label ↑	Process Type	Active	Template	Package State	Package ...	Last Modified By	Last Modified Date
Create Bills	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unmanaged		Vedant Kshirsagar	9/23/2025, 7:57 AM
Send Mails To Borrower	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unmanaged		Vedant Kshirsagar	9/23/2025, 7:29 AM
Update Stock	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unmanaged		Vedant Kshirsagar	9/23/2025, 7:15 AM

Creating Flows for :

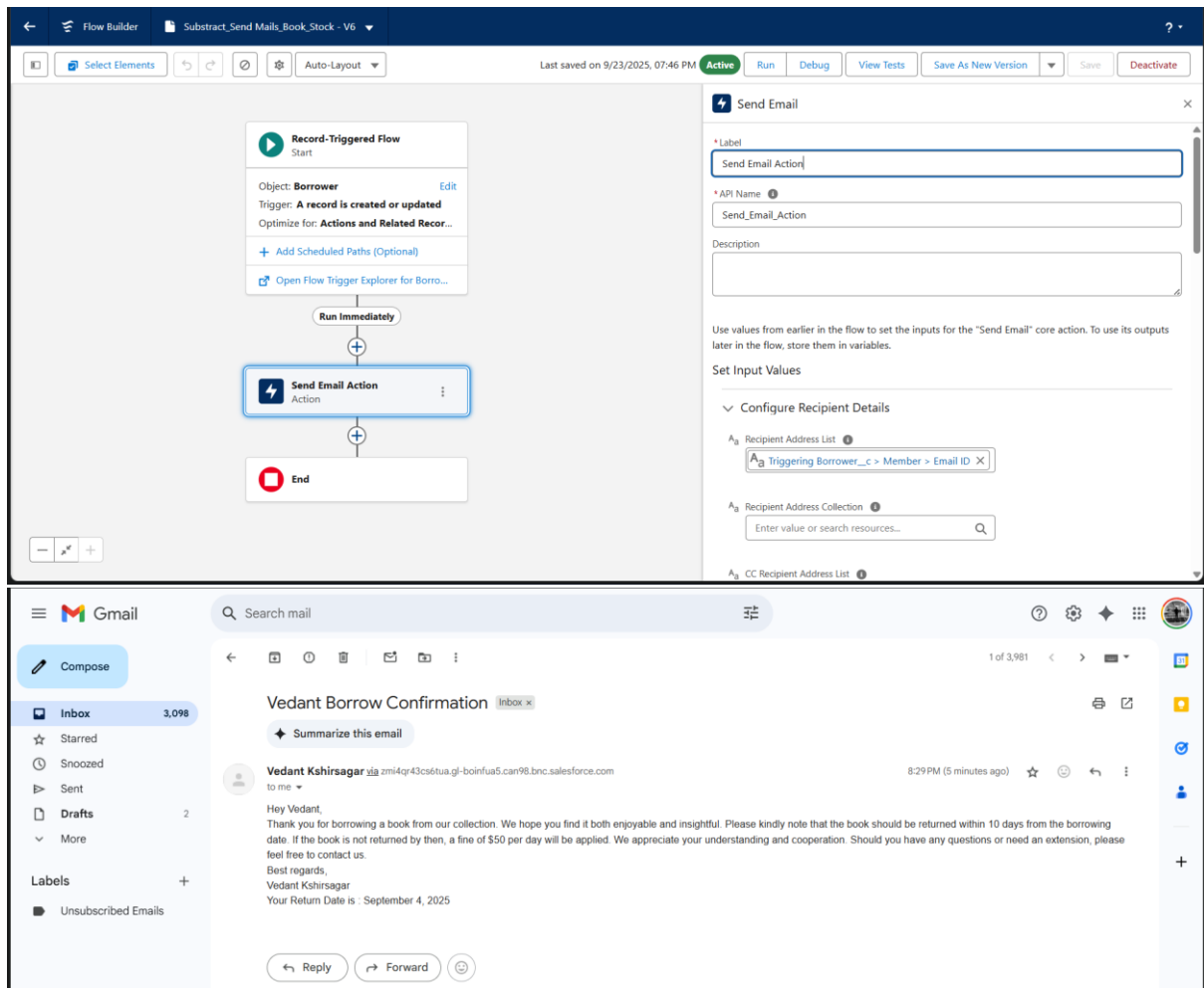
1. Reducing the stock of the book by 1 when the book is borrowed



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.