

# Exam.1 Validation Rules

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## How Salesforce Processes Validation Rules

Salesforce processes rules in the following order:

1. Validation rules
2. Assignment rules
3. Auto-response rules
4. Workflow rules (with immediate actions)
5. Escalation rules

In addition,

- When one validation rule fails, Salesforce continues to check other validation rules on that field or other fields on the page and displays all error messages at once.
- If validation rules exist for activities and you create an activity during lead conversion, the lead converts but a task isn't created.
- Validation rules are only enforced during lead conversion if validation and triggers for lead conversion are enabled in your organization.
- Campaign hierarchies ignore validation rules.
- Salesforce runs validation rules before it creates records submitted via Web-to-Lead and Web-to-Case and then creates records that have valid values.
- Validation rules continue to run on individual records if the owner is changed. If the Mass Transfer tool is used to change the ownership of multiple records, however, validation rules don't run on those records.

## Validation Rule Field Restrictions

Validation rule formulas don't or can't refer to:

- Compound fields, including addresses, first and last names, and dependent picklists and lookups
  - Campaign statistic fields, including statistics for individual campaigns and campaign hierarchies
  - Merge fields for auto-number or compound address fields such as Mailing Address
- NOTE Merge fields for individual address fields, such as Billing City, are OK to use in validation rule formulas.

In relation to other fields and functions in Salesforce, validation rules behave as follows:

- The detail page of a custom activity field doesn't list associated validation rules.
- Workflow rules and some processes can invalidate previously valid fields. Invalidation occurs because updates to records based on workflow rules and also on process scheduled actions don't trigger validation rules.
- Process record updates on immediate actions do fire validation rules.
- You can't create validation rules for relationship group members.

- You can use roll-up summary fields in validation rules because the fields don't display on edit pages. Do not use roll-up summary fields as the error location.

## Lookup Filters vs. Validation Rules

Validation rules and lookup filters achieve similar ends, but offer different advantages. Use a lookup filter if:

- You want to improve user efficiency by limiting the number of available options in a lookup search dialog.
- You want to improve user efficiency by automating filters on lookup search dialogs that your users manually set.

Use a validation rule if:

- You're close to the maximum number of lookup filters allowed.
- You must implement a complex business rule that requires you to use a formula. Formulas can reference fields that basic filter criteria can't reference, such as fields on the parent of the source object. Formulas can also use functions. For example, use ISNEW if the rule should only apply on record creation, or ISCHANGED if the rule should apply when a field changes.

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