

PHASE 4) Validation Rules Implementation

Implement Validation Rules on the Rental object to ensure data accuracy and prevent incomplete or incorrect record creation.

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Due_Back_Date_rule	Due Back Date	the due back date cannot be a past date, enter a correct date.	✓	RAEL KAPANGA, 2/15/2026, 4:55 PM
Due_Back_Date_rule_2	Due Back Date	the due back date must be after the pick up date, enter a correct date.	✓	RAEL KAPANGA, 2/14/2026, 4:08 PM
Due_Back_Date_rule_3	Due Back Date	the due back date cannot be before the event date, enter a correct date.	✓	RAEL KAPANGA, 2/15/2026, 4:39 PM
Event_Date_rule	Event Date	the event date cannot be a past date, enter a correct date.	✓	RAEL KAPANGA, 2/14/2026, 3:59 PM
Pick_up_Date_rule	Pickup Date	the pick-up date cannot be a past date, enter a correct date.	✓	RAEL KAPANGA, 2/14/2026, 4:01 PM
pick_up_Date_rule_2	Pickup Date	the pickup date cannot be after the event date, enter a correct date.	✓	RAEL KAPANGA, 2/14/2026, 4:45 PM

- Due back date rule 1

Rentals Validation Rule

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Validation Rule Detail		Edit	Clone
Rule Name	Due_Back_Date_rule	Active	✓
Error Condition Formula	Due_Back_Date__c < TODAY()		
Error Message	the due back date cannot be a past date, enter a correct date.	Error Location	Due Back Date
Description	the due back date cannot be a past date		
Created By	RAEL KAPANGA, 2/14/2026, 4:03 PM	Modified By	RAEL KAPANGA, 2/14/2026, 4:03 PM
Edit Clone			

- Due back date rule 2

Rentals Validation Rule

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Validation Rule Detail		Edit	Clone
Rule Name	Due_Back_Date_rule_2	Active	✓
Error Condition Formula	Due_Back_Date__c <= Pickup_Date__c		
Error Message	the due back date must be after the pick up date, enter a correct date.	Error Location	Due Back Date
Description	the due back date must be after the pick up date		
Created By	RAEL KAPANGA, 2/14/2026, 4:08 PM	Modified By	RAEL KAPANGA, 2/14/2026, 4:08 PM
Edit Clone			

- Due back date rule 3

The screenshot shows the 'Rentals Validation Rule' detail page in the Salesforce Object Manager. The page title is 'Rentals Validation Rule'. On the left, there is a sidebar with various options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area displays the validation rule details:

Validation Rule Detail		Edit	Clone
Rule Name	Due_Back_Date_rule_3	Active	<input checked="" type="checkbox"/>
Error Condition Formula	Event_Date__c < Due_Back_Date__c	Error Location	Due Back Date
Error Message	The due back date cannot be before the event date, enter a correct date.	Description	
Created By	RAEL KAPANGA, 2/14/2026, 4:40 PM	Modified By	RAEL KAPANGA, 2/15/2026, 4:39 PM
Edit Clone			

- Event date rule

Rentals Validation Rule

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The screenshot shows the 'Validation Rule Detail' page for the 'Event date rule'. The page title is 'Validation Rule Detail'. The main content area displays the validation rule details:

Validation Rule Detail		Edit	Clone
Rule Name	Event_Date_rule	Active	<input checked="" type="checkbox"/>
Error Condition Formula	Event_Date__c < TODAY()	Error Location	Event Date
Error Message	The event date cannot be a past date, enter a correct date.	Description	
Description	The event date cannot be a past date	Created By	RAEL KAPANGA, 2/14/2026, 3:59 PM
Created By	RAEL KAPANGA, 2/14/2026, 3:59 PM	Modified By	RAEL KAPANGA, 2/14/2026, 3:59 PM
Edit Clone			

- Pick up date rule 1

Rentals Validation Rule

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The screenshot shows the 'Validation Rule Detail' page for the 'Pick up date rule 1'. The page title is 'Validation Rule Detail'. The main content area displays the validation rule details:

Validation Rule Detail		Edit	Clone
Rule Name	Pick_up_Date_rule	Active	<input checked="" type="checkbox"/>
Error Condition Formula	Pickup_Date__c < TODAY()	Error Location	Pickup Date
Error Message	The pickup date cannot be a past date, enter a correct date.	Description	
Description	The pick-up date cannot be a past date	Created By	RAEL KAPANGA, 2/14/2026, 4:01 PM
Created By	RAEL KAPANGA, 2/14/2026, 4:01 PM	Modified By	RAEL KAPANGA, 2/14/2026, 4:01 PM
Edit Clone			

- Pick up date rule 2

Rentals Validation Rule

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The screenshot shows the 'Validation Rule Detail' page for the 'Pick up date rule 2'. The page title is 'Validation Rule Detail'. The main content area displays the validation rule details:

Validation Rule Detail		Edit	Clone
Rule Name	pick_up_Date_rule_2	Active	<input checked="" type="checkbox"/>
Error Condition Formula	Pickup_Date__c > Event_Date__c	Error Location	Pickup Date
Error Message	The pickup date cannot be after the event date, enter a correct date.	Description	
Description	The pickup date cannot be after the event date	Created By	RAEL KAPANGA, 2/14/2026, 4:45 PM
Created By	RAEL KAPANGA, 2/14/2026, 4:45 PM	Modified By	RAEL KAPANGA, 2/14/2026, 4:45 PM
Edit Clone			

Testing & Verification

Each validation rule was tested by:

- Attempting to create invalid records
- Confirming error messages display correctly
- Verifying that valid records save successfully

The screenshot shows a product creation form with the following fields and their values:

- Event Date:** 2/21/2026
- Prom:** Selected
- Product Details:**
 - *Fit style:** Classic
 - *Tuxedo rental style:** Notch Lapel
 - Color:** Navy
- Status Tracking:**
 - *Pickup Date:** 2/23/2026 (highlighted in pink)
 - Rental Status:** in Process
 - *Due Back Date:** 2/19/2026 (highlighted in pink)
 - Returned:**

Validation errors are displayed below the date fields:

- Pickup Date:** the pickup date cannot be after the event date, enter a correct date.
- Due Back Date:** the due back date must be after the pick up date, enter a correct date.; the due back date cannot be before the event date, enter a correct date.

At the bottom right are buttons: **Cancel**, **Save & New**, and **Save**.

The screenshot shows a product creation form with the following fields and their values:

- Event Date:** 2/17/2026
- Prom:** Selected
- Product Details:**
 - *Fit style:** Slim Fit
 - *Tuxedo rental style:** Peak Lapel
 - Color:** Grey
- Status Tracking:**
 - *Pickup Date:** 2/19/2026 (highlighted in pink)
 - Rental Status:** in Process
 - *Due Back Date:** 2/15/2026 (highlighted in pink)
 - Returned:**

Validation errors are displayed below the date fields:

- Pickup Date:** the pickup date cannot be after the event date, enter a correct date.
- Due Back Date:** the due back date must be after the pick up date, enter a correct date.

At the bottom right are buttons: **Cancel**, **Save & New**, and **Save**.

Functional Outcome

The system now prevents invalid rental date entries, ensures logical rental duration and protects data integrity. Users receive clear, immediate error messages before saving.

PHASE 5) Automation & Flow Implementation

FLOW 1: Rental Status Change to Order Placed

Flow type : Record-triggered flow.

Used record trigger type, when a rental record is created, the system should automatically change the default status “in progress” of the rental to the status to Order Placed to reflect that the rental request has been successfully submitted.

Flow Builder rental status change to order placed - V3

Last saved on 2/15/2026, 08:22 PM Active Run Debug

Version 3: Active

Record-Triggered Flow Start

Object: Rentals Edit
Trigger: A record is created
Optimize for: Fast Field Updates
Open Flow Trigger Explorer for Rentals

Configure Start

Trigger the Flow When:

- A record is created
- A record is updated
- A record is created or updated
- A record is deleted

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and conserve your org's resources.

Condition Requirements:

None

Optimize Flow

Fast Field Updates

Update fields on the record that triggers the flow to run. This high-performance flow runs before the record is saved to the database.

Assignment

* Label: rental status change * API Name: rental_status_change

Description: change the rental status to Order placed when a new Rental record is created.

Set Variable Values

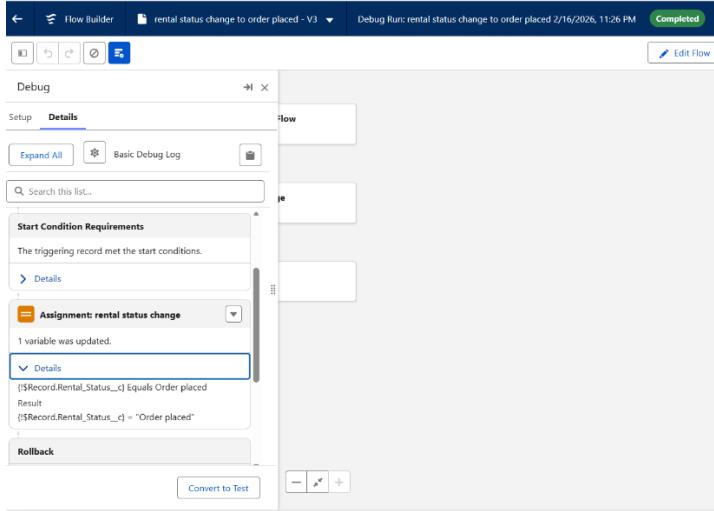
Each variable is modified by the operator and value combination.

Variable	Operator	Value
...gering Rentals__c > Rental Status	Equals	Aa Order placed

+ Add Assignment

This flow ensures consistent status tracking, eliminates manual updates and improves reporting accuracy.

Used the feature Debug to test the flow before activating it.



FLOW 2: Status Update to Past Due

Flow type: Record-Triggered Flow

Goal: If a rental has not been returned after the rental duration has passed, the system must automatically change the status to Past Due.

Trigger Configuration

- Object: Rentals
- Trigger: Record Updated, because a rental can't have a past due status when it is created but only later on.
- Condition: Return Date < TODAY
- Schedule path: I used schedule path because I have to execute this part of a flow at a scheduled time after a triggering event.

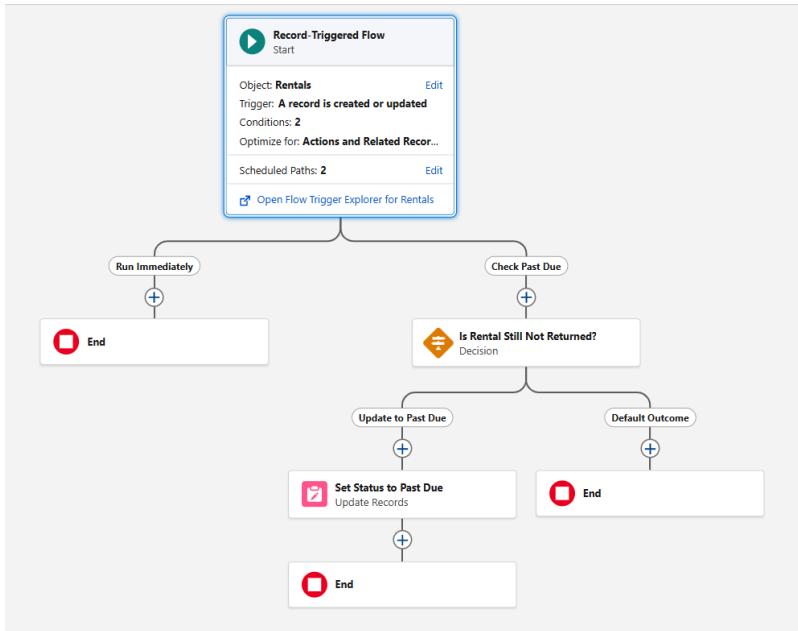
Flow Logic

The flow evaluates whether:

- Status ≠ Returned
- AND Due Back Date is before today

If true:

- Update Status → Past Due



Flow Builder / status update to past due V4

Last saved on 2/15/2026, 08:20 PM Active Run Debug View Tests Save As New Version Save Deactivate

Configure Start

A record is created or updated

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements

All Conditions Are Met (AND)

Field: returned	Operator: Equals	Value: False	
AND	Field: Due Back Date	Operator: Is Null	Value: False

+ Add Condition

When to Run the Flow for Updated Records

Every time a record is updated and meets the condition requirements

Only when a record is updated to meet the condition requirements

Configure Scheduled Paths

SCHEDULED PATHS

Add a scheduled path if you want a flow path to run a certain amount of time after the triggering record is created or updated. That time can be based on the triggering event or on a specified date or date/time field in the record. A separate flow interview runs for each scheduled path. Each scheduled path interview is queued to run at the scheduled time, but can be delayed until system resources become available. Path labels appear on connectors in the canvas.

Run Immediately

Check Past Due

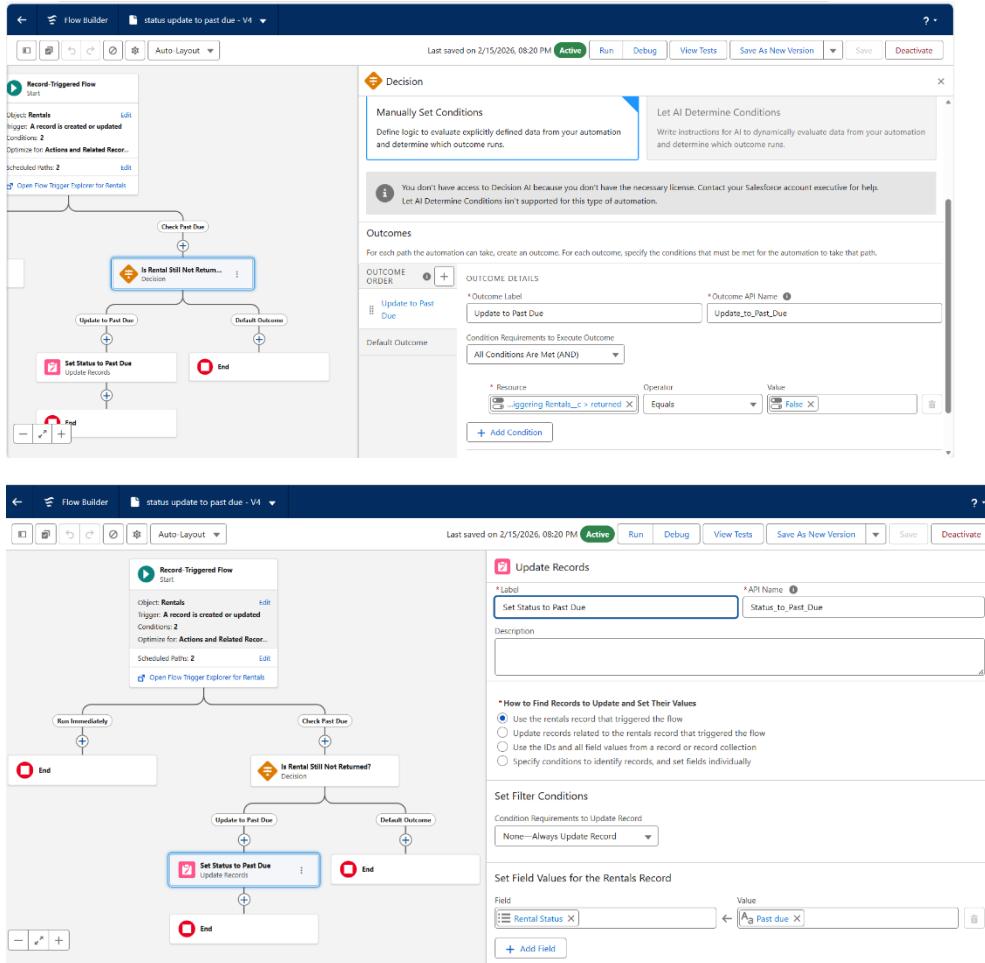
SCHEDULED PATH DETAILS

* Path Label: Check Past Due
* API Name: Check_Past_Due

* Time Source: Rentals_c: Due Back Date

* Offset Number: 0
* Minutes After: 0

Show advanced options



FLOW 3: Set Status to Returned

Flow type: Record-Triggered Flow

When a rental item is returned, the system should automatically update the rental status to Returned.

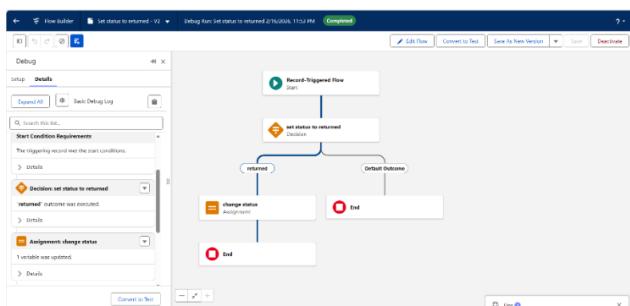
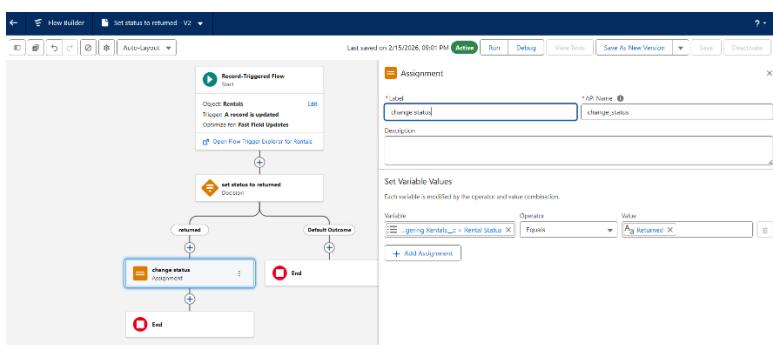
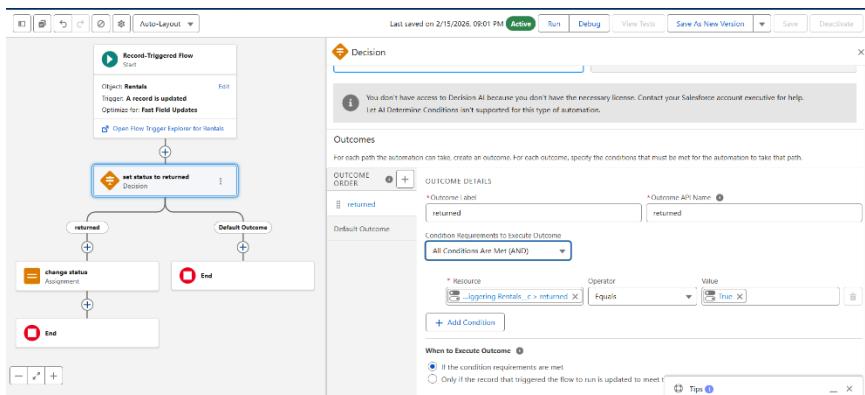
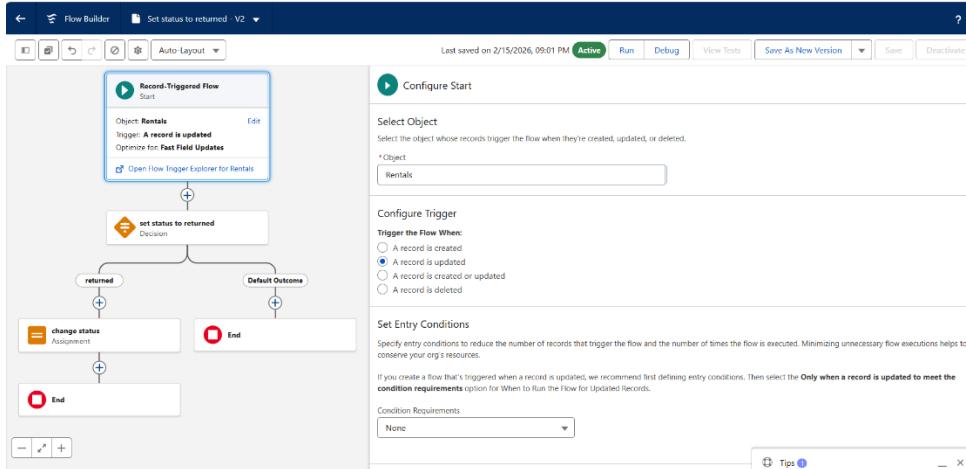
Trigger Configuration

- Object: Rentals
- Trigger: Record Updated
- Condition: Return Checkbox = True, every time the return check box is checked the flow should automatically update the status to returned

Flow Logic

When return condition is met a want the flow to:

- Update Status to Returned



The goal of this flow is to maintain accurate tracking, prevents incorrect Past Due updates and supports accurate reports.

FLOW 4: Send Email When Rental Is Past Due

Flow Type: Record-Triggered Flow

When a rental status changes to **Past Due**, an automated email notification should be sent to the related Contact to inform them of the late return.

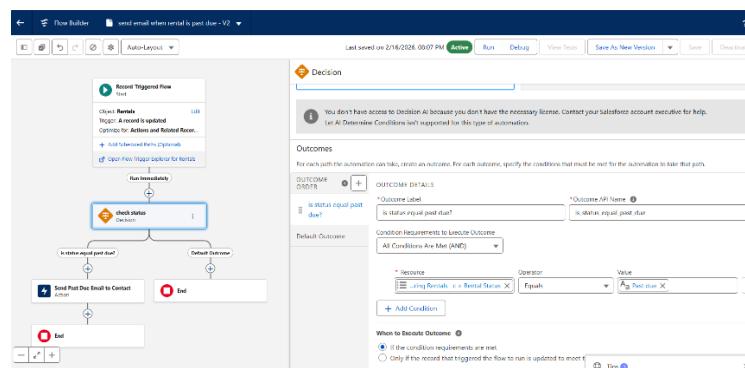
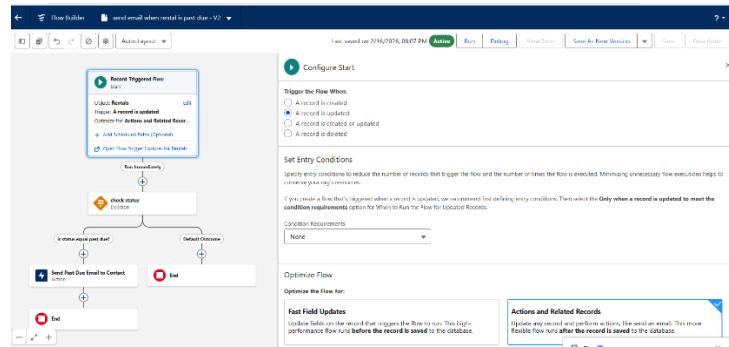
Trigger Configuration

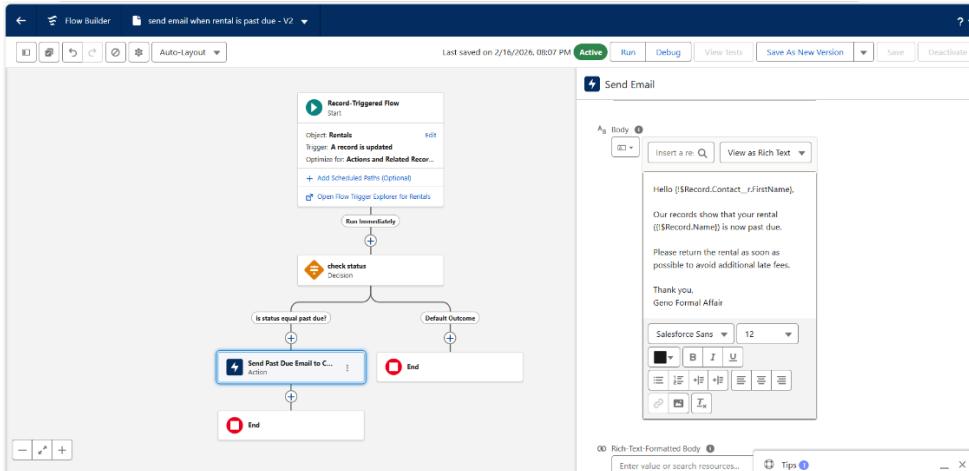
- Object: Rentals
- Trigger: this will be triggered when a record is updated
- Condition: when the rental status = Past Due

Flow Logic

When status changes to Past Due an email should be sent.

- I used the Send Email feature in the Action under interaction
- The email should be send to `{!$Record.Contact__r.Email}`, this formula indicates the email of the contact.





Output result

late notification Summarize

RK RAEL KAPANGA<raelpanga@gmail.com> via zoy6gll5jq3d.gk-edyzduan.can96.bnc.salesforce.com Mon 2/16/2026 8:17 PM

To: Kapanga, Rael

CAUTION: External Sender

Hello Israel,

Our records show that your rental (TA-00011) is now past due.

Please return the rental as soon as possible to avoid additional late fees.

Thank you,
Geno Formal Affair

This flow improves customer communication and reduces manual follow-up.

The system was designed using event-driven automation principles.

Each flow handles a specific lifecycle stage of the Rental object, ensuring:

- Clear separation of logic
- Scalable automation design

Minimal manual intervention

