

PHASE 4) Validation Rules Implementation

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

SETUP > OBJECT MANAGER

Rentals

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Page Layouts

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Buttons, Links, and Actions

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Restriction Rules

Scoping Rules

Validation Rules

6 Items, Sorted by Rule Name

New

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	▼
Pickup_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

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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

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- 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

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- Due back date rule 3

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Rentals Validation Rule

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Validation Rule Detail

EditClone

Active

✓

Rule Name	Due_Back_Date_Rule_3	Error Condition Formula	Event_Date__c >= Due_Back_Date__c	Error Message	the due back date cannot be before the event date, enter a correct date	Error Location	Due Back Date
Description	the due back date cannot be before the event date						
Created By	RAEL KAPANGA, 2/14/2026, 4:40 PM			Modified By	RAEL KAPANGA, 2/15/2026, 4:39 PM		

EditClone

- Event date rule

Rentals Validation Rule

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Validation Rule Detail

EditClone

Active

✓

Rule Name	Event_Date_rule	Error Condition Formula	Event_Date__c < TODAY()	Error Message	the event date cannot be a past date, enter a correct date.	Error Location	Event Date
Description	the event date cannot be a past date						
Created By	RAEL KAPANGA, 2/14/2026, 3:59 PM			Modified By	RAEL KAPANGA, 2/14/2026, 3:59 PM		

EditClone

- Pick up date rule 1

Rentals Validation Rule

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Validation Rule Detail

EditClone

Active

✓

Rule Name	Pick_up_Date_rule	Error Condition Formula	Pickup_Date__c < TODAY()	Error Message	the pick-up date cannot be a past date, enter a correct date.	Error Location	Pickup Date
Description	the pick-up date cannot be a past date						
Created By	RAEL KAPANGA, 2/14/2026, 4:01 PM			Modified By	RAEL KAPANGA, 2/14/2026, 4:01 PM		

EditClone

- Pick up date rule 2

Rentals Validation Rule

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Validation Rule Detail

EditClone

Active

✓

Rule Name	pick_up_Date_rule_2	Error Condition Formula	Pickup_Date__c > Event_Date__c	Error Message	the pickup date cannot be after the event date, enter a correct date.	Error Location	Pickup Date
Description	the pickup date cannot be after the event date						
Created By	RAEL KAPANGA, 2/14/2026, 4:45 PM			Modified By	RAEL KAPANGA, 2/14/2026, 4:45 PM		

EditClone

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 form with the following sections and fields:

- Event Date:** 2/21/2026
- Event Type:** Prom
- Product Details:**
 - Fit style:** Classic
 - Color:** Navy
 - Tuxedo rental style:** Notch Lapel
- Status Tracking:**
 - Pickup Date:** 2/23/2026. Error message: "the pickup date cannot be after the event date, enter a correct date."
 - Due Back Date:** 2/19/2026. Error message: "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."
 - Rental Status:** in Process
 - returned:** ☐

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

The screenshot shows a form with the following sections and fields:

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

At the bottom, there 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.

The screenshot displays the Flow Builder interface for a record-triggered flow. The flow is named "rental status change" and is configured to trigger when a record is created. The flow steps include a "rental status change" assignment and an "End" node. The configuration panel on the right shows the trigger settings, entry conditions, and optimization options. A "Fast Field Updates" banner is visible, indicating that the flow will update fields before the record is saved to the database.

Flow Builder Configuration:

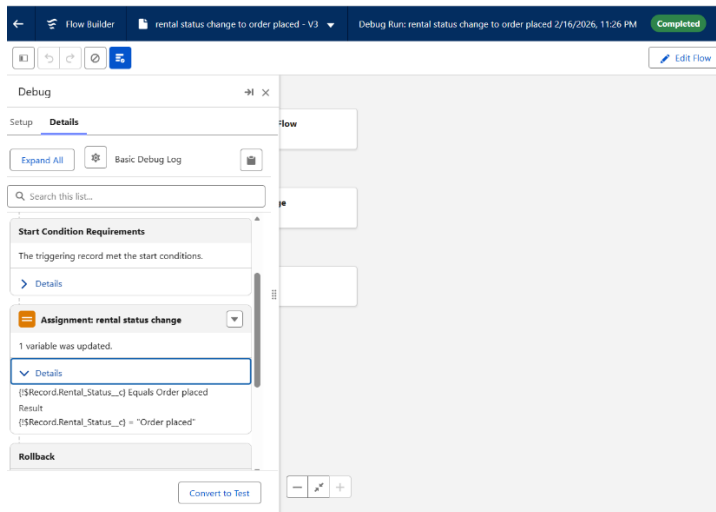
- Record-Triggered Flow Start**
 - Object: Rentals
 - Trigger: A record is created
 - Optimize for: Fast Field Updates
- rental status change** (Assignment)
- End**

Configure Trigger Panel:

- Configure Trigger**
 - 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**
 - Optimize the Flow for:
 - 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.

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 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.

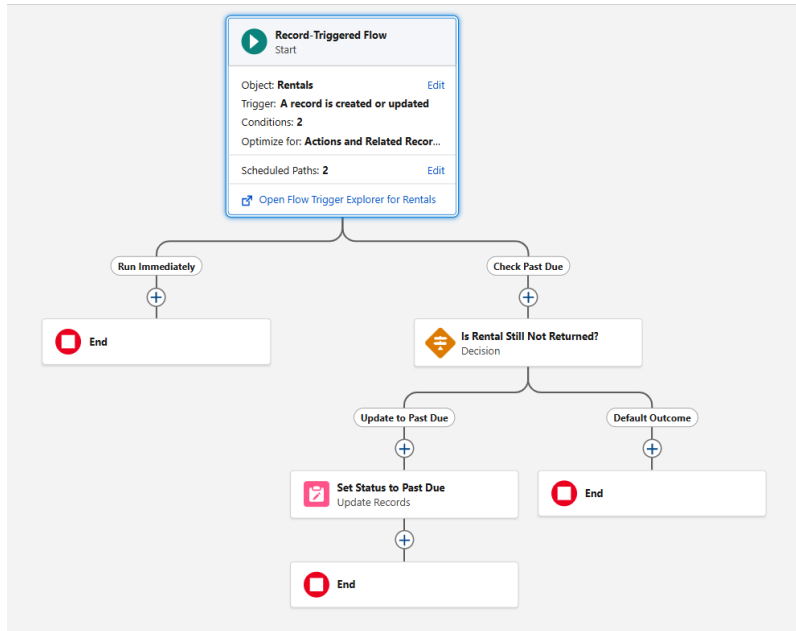
Flow Logic

The flow evaluates whether:

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

If true:

- Update Status → Past Due



Flow Builder interface showing the configuration of the 'Record-Triggered Flow'.

Configure Start

- ☒ 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 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	Operator	Value
returned X	Equals	false X
Due Back Date X	Is Null	false X

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

Run Immediately

Check Past Due

SCHEDULED PATH DETAILS

*** Path Label**: Check Past Due

*** API Name**: Check_Past_Due

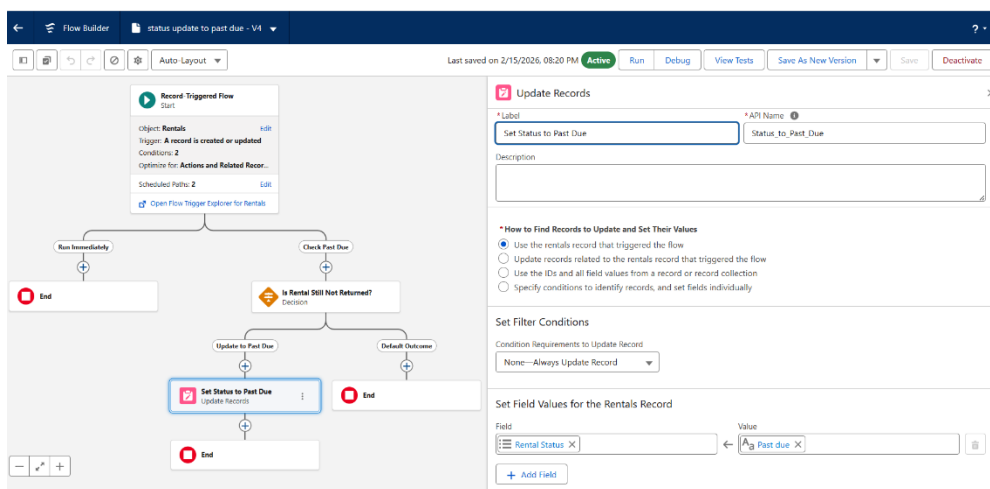
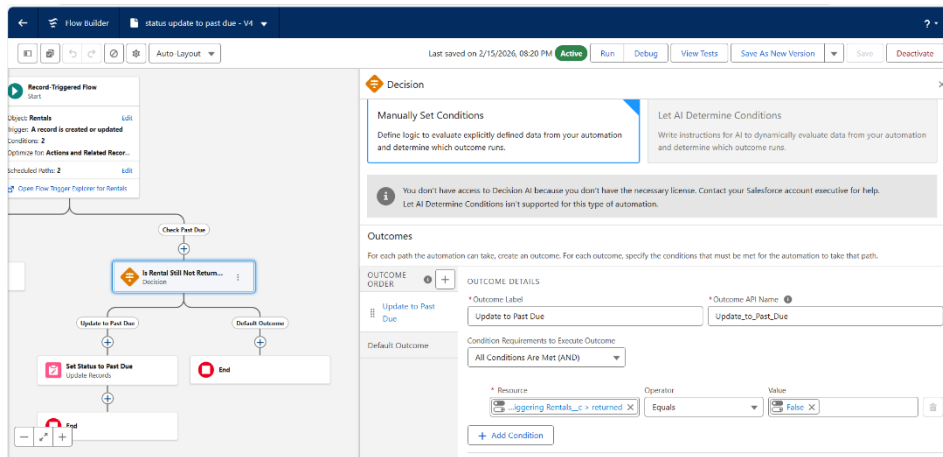
*** Time Source**: Rentals__c: Due Back Date

*** Offset Number**: 0

*** Offset Options**: Minutes After

[Show advanced options](#)

[Delete Path](#)



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.

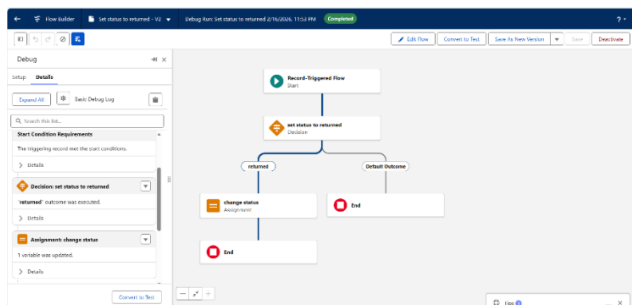
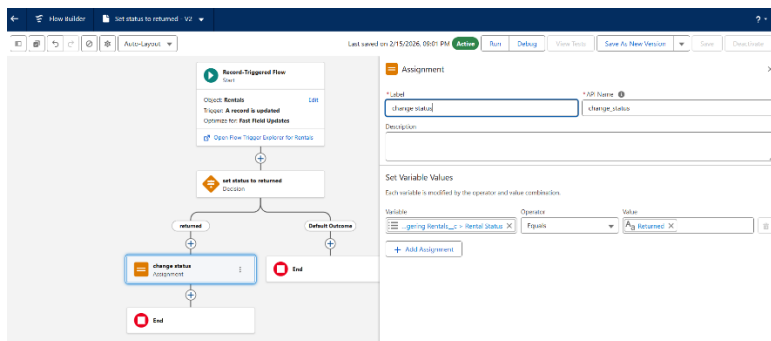
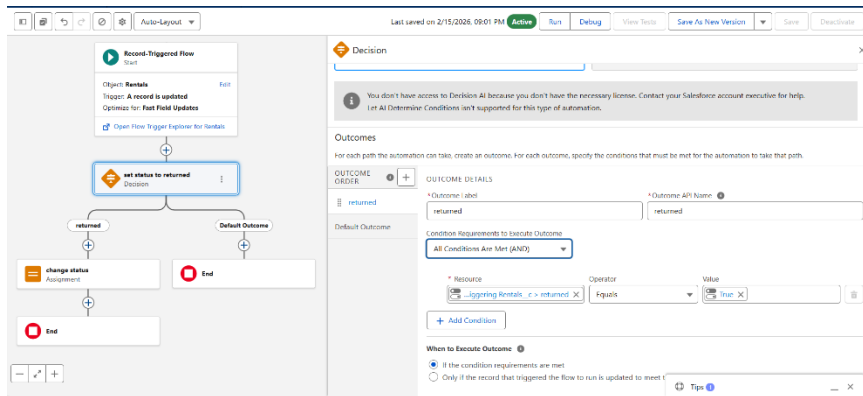
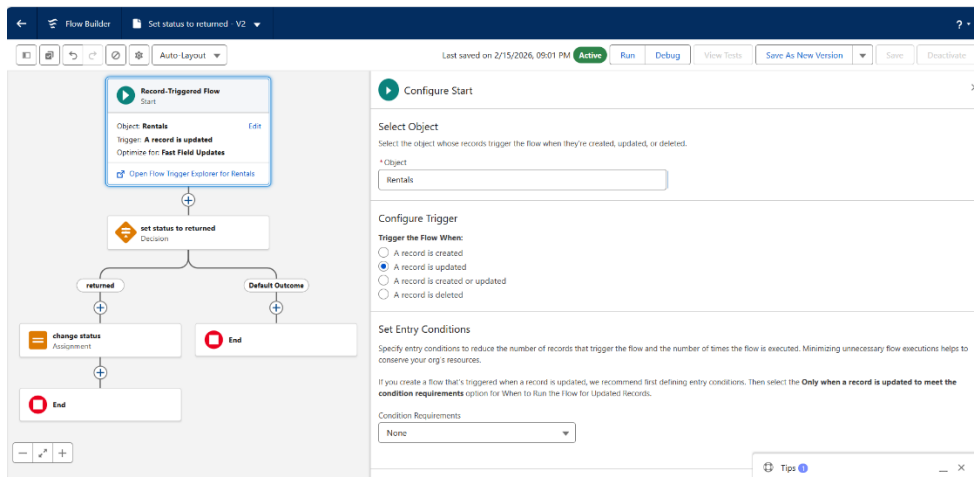
Trigger Configuration

- 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.

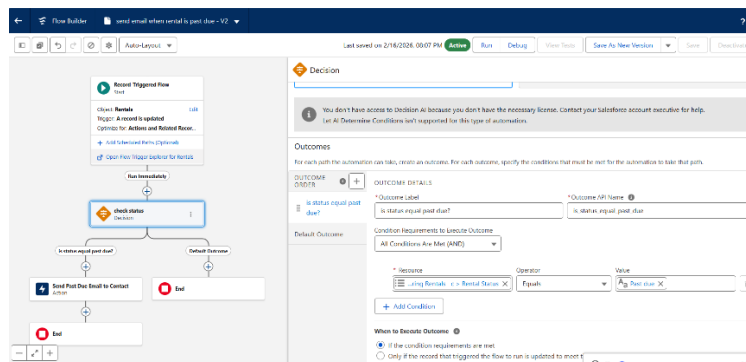
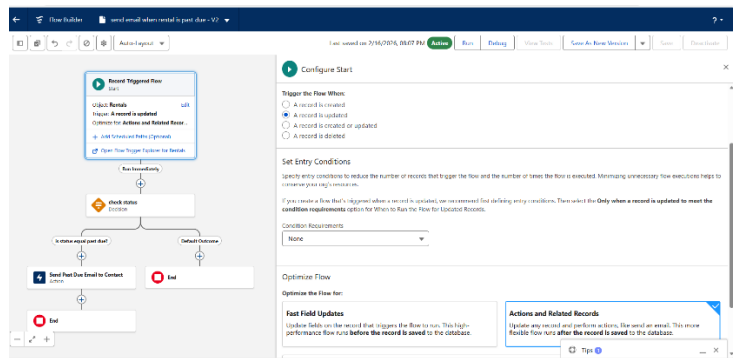
Trigger Configuration

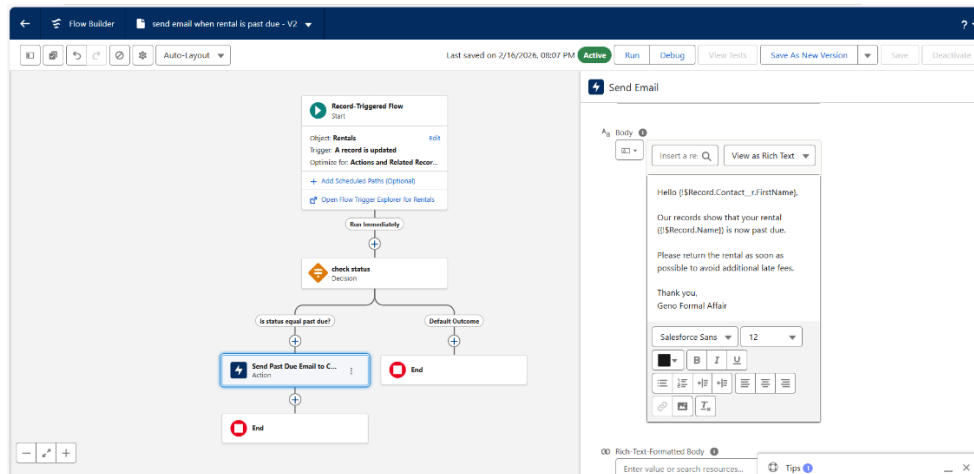
- Object: Rentals
- Trigger: this will be triggered when a record is updated
- Condition: when the rental status = Past Due

Flow Logic

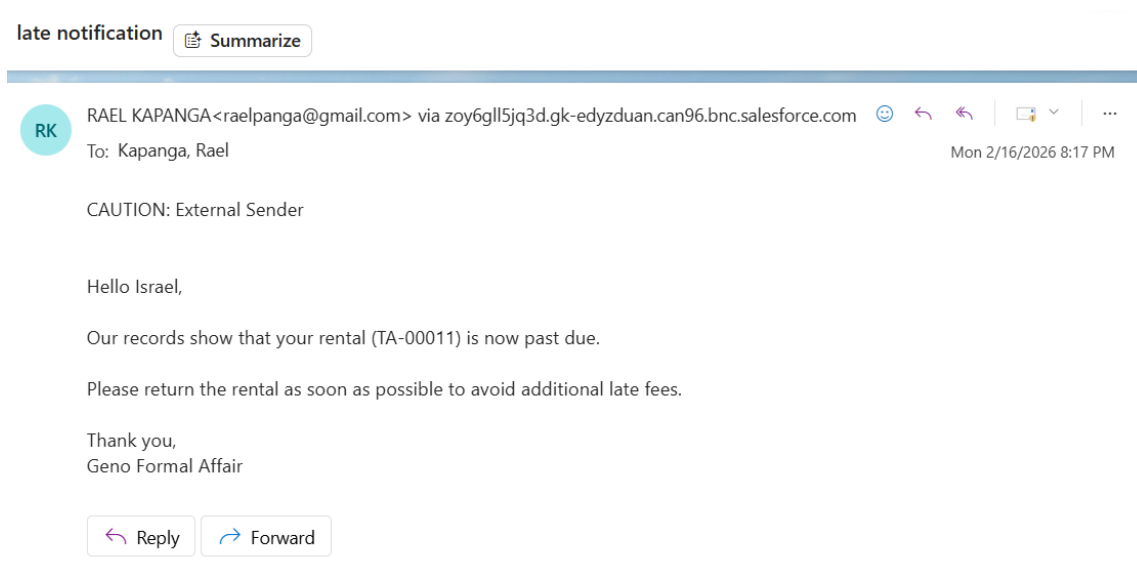
When status changes to Past Due an email should be sent.

- 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



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

