

Phase 6 – Validation Rules / Security

Objective: Ensure data integrity and proper access.

Validation Rules

- Quantity > 0
- Purchase Price > 0

Field-Level Security

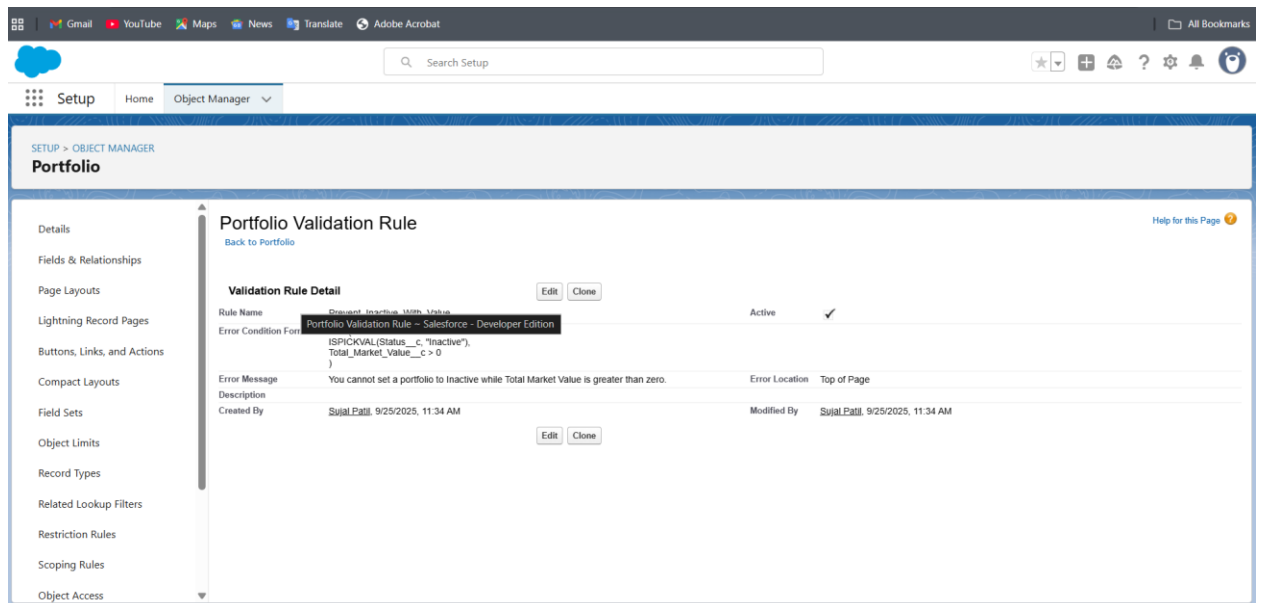
- Make formulas visible for relevant profiles.

Sharing Rules

- Restrict access to sensitive financial data if needed.

Tips:

- Test with multiple profiles to ensure proper access.
- Validati



on rules prevent incorrect entries.

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Scoping Rules

New Rule

Sharing (Grants Access)

Filtering (Refines Access)

Result Set

Organization-Wide Sharing Defaults

Sharing Mechanisms (optional)

Scoping Rules

Filtered Records

Set a default access level for an object's records.

Configure role hierarchy, sharing rules, and more.

Filter records based on your users' needs. Filter by division, brand, record owner, or another criteria.

Records that meet a scoping rule's criteria appear when you select Filter by Scope.

SOQL

List View

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Use scoping rules to control the records that your users see based on criteria you select. Users can still access the records allowed by your sharing settings.

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Sharing Mechanisms (optional)

Restriction Rules

Filtered Records

Set a default access level for an object's records.

Configure role hierarchy, sharing rules, and more.

Filter records based on user and record criteria.

Only records that meet restriction rule criteria are visible.

Use restriction rules when you want certain users to only see a specific set of records.

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Validation Rule Detail

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Clone

Rule Name

Quantity must be greater than 0

Active

✓

Error Condition Formula

Quantity < 0

Error Location

Top of Page

Error Message

Quantity must be greater than 0

Modified By

Sujal.Patel

Description

Created By

Sujal.Patel

Created

9/25/2025, 7:47 PM

Modified

9/25/2025, 7:47 PM

Edit

Clone