

Create Validations

Validations help you, as an administrator, to implement a custom logic where you can prevent a save or issue a warning message to users during save based on certain conditions.

Procedure

1. Navigate to your user profile on the top-right corner of your screen, and from the dropdown list select Settings > All Settings ? General and click Extensibility Administration.

The system opens a new screen and displays a list of all business entities in the left panel. These entities are grouped by services.

2. Select a service and drill down to select an entity.
3. Navigate to the Validations tab and click the Create Validation icon (🛠️). The system launches the validation editor tab.

The editor has three main blocks:

- Header: Specify the validation name and description here.
 - Condition: Set the desired conditions using a flow-based visual condition editor.
 - Action: Specify an error or warning message based on the conditions defined in the condition block.
4. In the header block, specify the validation name and description.
 5. In the Condition Block set the desired conditions using a flow-based visual condition editor.
 - Select the standard or extension field from the dropdown.
 - Select the comparison operator.
 - Select the target comparison. You can compare either by a fixed value or with another field.
 - If you choose Value, enter a corresponding target value. If you choose Field, select a target field.

Add multiple conditions by clicking the Add Condition icon (➕). To remove a condition, click the Remove Condition (🗑️). To clear all conditions in a block, click the Delete Condition Block icon

Note that when you create multiple conditions, the condition group is considered fulfilled only if all the conditions within a group are met.

6. Optional: You can also create an OR condition by clicking the + Or button. The system displays additional condition blocks. Follow the same steps as earlier to fill one or more OR condition blocks.

Note

When you create multiple OR conditions, the condition group is considered fulfilled if any one of the block conditions are met.

7. In the third block, under Action choose to show either an error or a warning message.
8. Add the message text.
9. Click Save and Activate.

Note

You can create a maximum of five validations per entity.

In the Determinations tab, the system lists all validations for a specified entity. Click the Edit (🔍) or Delete icons to edit or delete the corresponding validation.