

Pipeline Validations

App Overview

This app serves the purpose of implementing validations on the Opportunity Stage and Lead Status fields. In order to force users to add valuable information at every step of Lead or Opportunity, admins create validation rules, but these validation rules provide a static error message and require testing before deployment. Pipeline Validations app will create validations in seconds and the errors will be dynamic. For example, if you have 5 fields to validate at stage "Prospecting", you fill 3 of these fields and try to change the stage, you will get an error message to fill the remaining 2 fields, unlike validation rules where you get a static message

How to use

Pipeline Validations app is super easy to use on both lightning and classic, For lightning please follow these steps.

1. Install the package and then go to -> Setup -> Lightning App Builder -> Lightning page (Pipeline Field Validations).

The Lightning App Builder provides an easy to use graphical interface for creating custom Lightning pages for Salesforce Lightning Experience and mobile app. Lightning pages are built using Lightning components—compact, configurable, and reusable elements that you can drag and drop into regions of the page in the Lightning App Builder.

View: All [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other All

Lightning Pages							
Action	Label ↑	Name	Namespace Prefix	Description	Type	Created By	Last Modified By
Clone View	Pipeline Field Validations	Pipeline_Field_Validations	pfv		App Page	SDaud, 1/25/2021, 10:28 AM	SDaud, 1/25/2021, 10:28 AM

2. Now click the label of this page and on the next page click on "View". Make sure to first activate and then save the page

You're viewing this page in read-only mode.

Lightning App Builder Pages Pipeline Field Validations ? Help

Desktop Shrink To View

Activation...

Select Object

--- Please Select a Value ---

Select Record Type

-- Default --

Select Picklist Value

SERIAL NUMBER	PICKLIST VALUE	RECORD TYPE	FIELDS TO VALIDATE	ACTIVE?	ACTION
Save Changes Add Validation					

3. Open App Launcher and search for the page Pipeline Field Validations

4. When you open the page you will have the options to select the object, record type, and picklist value

Hide Section - Select Picklist Value Pipeline Field Validations

Select Object

--- Please Select a Value ---

Select Record Type

-- Default --

Select Picklist Value

SERIAL NUMBER	PICKLIST VALUE	RECORD TYPE	FIELDS TO VALIDATE	ACTIVE?	ACTION
Save Changes Add Validation					

5. Select the Object, Record type, and a value of picklist on which you want to put field validations, put the API of fields you want to validate, separated by commas.

Pipeline Field Validations

▼ Select Object
Opportunity

▼ Select Record Type
-- Default --

▼ Select Picklist Value
Prospecting

SERIAL NUMBER	PICKLIST VALUE	RECORD TYPE	FIELDS TO VALIDATE	ACTIVE?	ACTION
5	Prospecting	Default	Number_Of_Cats__c,LeadSource,Primary_Con__c, CloseDate	☐	Remove

[Save Changes](#) [Add Validation](#)

6. If you want to put validations for all the record type then don't specify the record type and just add validations with record type "Default"

7. Make sure to mark validation records Active and then save

8. If you want to remove the validation you can de-activate it by unchecking "Active?" and then save the record. You can also remove the validation records by clicking on the "Remove" action

9. Now test the validation by going to a record of the Object selected for validation, move the Stage to the validation stage, and then try to change the stage to the next stage.

NOTE: Make sure that if you want to validate different fields based on record types, then de-active or remove the validations saved on the "Default" record type. It's a good practice.

Classic Salesforce Users:

1. Install the application and then go to Setup -> Visualforce Pages -> Page (ValidationSetPage)
2. Preview this page and then add validation here
3. Now follow the above-mentioned steps from step 5, in the lighting section.