



Salesforce Interview Preparation Toolkit

Formula and Validation Rules in Salesforce CRM

Description:

BISP is committed to provide BEST learning material to the beginners and advance learners. In the same series, we have prepared a complete end-to-end Hands-on Beginner's Guide for Salesforce. The document focuses on some common interview questions related to Formulas and Validation Rules. [Join our professional training program and learn from experts.](#)

History:

Version	Description	Change	Author	Publish Date
0.1	Initial Draft		Chandra Prakash Sharma	10 th Apr 2013
0.1	Review#1		Amit Sharma	10 th Apr 2013

Question : 1

SAP_Account_Id__c and Navison_Account_Id__c are two Text fields, Sell_to__c and Ship_to__c are two checkboxes. The rule should ensure that a record which has either SAP_Account_Id__c or Navison_Account_Id__c filled in (or both), can be saved only if either Sell_to__c and Ship_to__c (or both) are checked.

Solution :

SAP Account Edit

Save Save & New Cancel

Error: Invalid Data.
Review all error messages below to correct your data.

Information = Required Information

SAP Account Name Owner yogesh sharma

SAP_Account_Id

Navison_Account_Id

Sell_to

ship_to

Error: Please checked at least one checkbox.

Save Save & New Cancel

Go to **Setup > Create > Objects** > Select object name(Ex: Sap Account), then go to down select Validation rule Click on **New** button, you can see below.

Action	Rule Name	Error Location	Error Message	Active	Modified By
Edit Del	For Sap Account	ship_to	Please Check both Check box and Fill both Text box Field..	✓	yogesh sharma, 1/24/2014 4:41 PM

Then write here validation rule you can see below.

Example: More Examples ...

Display an error if Discount is more than 30%

If this formula expression is **true**, display the text defined in the Error Message area

```
IF ((AND (Sell_to__c=false , ship_to__c=false)),  
(AND (Sell_to__c=false , ship_to__c=false) ||  
AND (ISBLANK (SAP_Account_Id__c), ISBLANK (  
Navison_Account_Id__c))),  
False  
)
```

Functions

-- All Function Categories --

- ABS
- AND
- BEGINS
- BLANKVALUE
- BR
- CASE

ABS(number)
Returns the absolute value of a number, a number without its sign

[Help on this function](#)

Note : If you need Both check box check use this Validation.

OR(ISBLANK(SAP_Account_Id__c) , ISBLANK(Navison_Account_Id__c) ,IF(Sell_to__c = false, true ,false) ,IF(ship_to__c = false, true ,false))

Question : 2

Create a validation rule that when My_Check__c is unchecked, the TextField1__c and TextField2__c should have no values.

Solution :

check for check Box Edit

Save Save & New Cancel

Error: Invalid Data.
Review all error messages below to correct your data.

Information ! = Required Information

check for check Box Name Owner yogesh sharma

TextField1

TextField2

My_Check

Error: Please checked Checkbox.

Save Save & New Cancel

Below is validation Rule ..

check for check Box Validation Rule

[Back to check for check Box](#)



Validation Rule Detail

Edit Clone

Rule Name	chbox_my	Active	<input checked="" type="checkbox"/>
Error Condition Formula	OR(My_Check__c== FALSE , (OR(ISBLANK(TextField1__c) , ISBLANK(TextField2__c))))		
Error Message	Please checked Checkbox.	Error Location	My_Check
Description			
Created By	yogesh sharma, 2/3/2014 11:21 AM	Modified By	yogesh sharma, 2/3/2014 1:56 PM

Edit Clone

Code :

```
OR(My_Check__c== FALSE ,  
(OR( ISBLANK( TextField1__c ) , ISBLANK( TextField2__c ) ) ) )
```

Question 3 :

Validation rule for currency with 2 decimal values

Example : Valid: 12.00, 12.10, 12.01, 12.56

Not Valid: 12, 12.1, 12.0,12.203

Solution :

Example: [More Examples ...](#)

Display an error if Discount is more than 30%

If this formula expression is **true**, display the text defined in the Error Message area

```
NOT (REGEX (Price__c, "[0-9]+[.]{1}[0-9]{2}"))
```

Functions

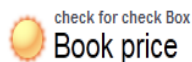
-- All Function Categories --

- ABS
- AND
- BEGINS
- BLANKVALUE
- BR
- CASE

ABS(number)
Returns the absolute value of a number, a number without its sign

[Help on this function](#)

NOT(REGEX(Price__c,"[0-9]+[.]{1}[0-9]{2}"))



Book price



[Customize Page](#) | [Edit Layout](#) | [Printable View](#) | [Help for this Page](#)

[Back to List: Custom Object Definitions](#)

[Open Activities \(0\)](#) | [Activity History \(0\)](#)

check for check Box Detail

check for check Box Name Book price

Owner [yogesh sharma \[Change\]](#)

Price 102.34

Created By [yogesh sharma](#), 1/27/2014 1:54 PM

Last Modified By [yogesh sharma](#), 1/27/2014 1:54 PM

Question 4 :

Apply to formula to the field which depends on some other field. I created a picklist field which contains BOX, Class-A, Class-B, Class-C. If anyone selected BOX in that picklist field then automatically Ticket fare has to reflect as 100, if they selected Class-A then 75 has to reflect and so on.

Solution :

Simple Formula Advanced Formula

Insert Field Insert Operator ▾

BISP
Business Intelligence Solution Providers Inc.

Functions
-- All Function Categories -- ▾

ABS
AND
BEGINS
BLANKVALUE
BR
CASE
Insert Selected Function

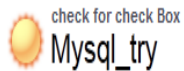
Ticket Fare (Text) =

```
IF(ISPICKVAL( Seats_Category__c, 'Box'),"100",IF(ISPICKVAL(Seats_Category__c, 'Class-A'),"75",IF(ISPICKVAL(Seats_Category__c, 'Class-B'),"50",IF(ISPICKVAL(Seats_Category__c, 'Class-C'),"25","0"))))
```

Code :

```
IF(ISPICKVAL( Seats_Category__c, 'Box'),"100",IF(ISPICKVAL(Seats_Category__c, 'Class-A'),"75",IF(ISPICKVAL(Seats_Category__c, 'Class-B'),"50",IF(ISPICKVAL(Seats_Category__c, 'Class-C'),"25","0"))))
```

Result :



[Customize Page](#) | [Edit Layout](#) | [Printable View](#) | [Help for this Page](#) ?

« Back to List: [Custom Object Definitions](#)

[Open Activities](#) [0] | [Activity History](#) [0]

check for check Box Detail

Edit Delete Clone

check for check Box Name MySQL_try

Owner [yogesh sharma](#) [Change]

Seats_Category	Class-C
Ticket Fare	25

Created By [yogesh sharma](#), 1/27/2014 3:55 PM

Last Modified By [yogesh sharma](#), 1/27/2014 3:55 PM

Edit Delete Clone

Question 5: Compare 2 checkboxes to complete a text field.

Need to compare the contents of 2 checkbox fields. If they both are checked, I want the new field to display "Digital and Physical".

If the digital checkbox field is checked, but the physical one is not, then I want to display "Digital Only".

If the physical checkbox field is checked but the digital one is not, then I want to display "Physical Only".

If neither fields are checked, then I want to display "Neither".

Solution :

check for check Box Name	myac
Channel_Digital_Distribution	<input checked="" type="checkbox"/>
Channel_Physical_Fulfillment	<input checked="" type="checkbox"/>
Show Value	Digital and Physical
Created By	voqesh sharma, 2/4/2014 10:22 AM

check for check Box Name	myac
Channel_Digital_Distribution	<input checked="" type="checkbox"/>
Channel_Physical_Fulfillment	<input type="checkbox"/>
Show Value	Digital Only
Created By	voqesh sharma, 2/4/2014 10:44 AM

check for check Box Name	myac
Channel_Digital_Distribution	<input type="checkbox"/>
Channel_Physical_Fulfillment	<input checked="" type="checkbox"/>
Show Value	Physical Only
Created By	voqesh sharma, 2/4/2014 10:45 AM

check for check Box Name	myac
Channel_Digital_Distribution	<input type="checkbox"/>
Channel_Physical_Fulfillment	<input type="checkbox"/>
Show Value	Neither
Created By	voqesh sharma, 2/4/2014 10:46 AM

Validation Rule :

Simple Formula	Advanced Formula
Insert Field	Insert Operator
Show Value (Text) = <code>IF(AND(Channel_Digital_Distribution_c == False, Channel_Physical_Fulfillment_c == False) , "Neither", IF(AND(Channel_Digital_Distribution_c == True , Channel_Physical_Fulfillment_c == True) , "Digital and Physical", IF(Channel_Physical_Fulfillment_c == True , "Physical Only", IF(Channel_Digital_Distribution_c == True , " Digital Only" , "False"))))</code>	

Code :

```
IF( AND( Channel_Digital_Distribution_c == False, Channel_Physical_Fulfillment_c == False) , "Neither", IF( AND( Channel_Digital_Distribution_c == True , Channel_Physical_Fulfillment_c == True) , "Digital and Physical", IF( Channel_Physical_Fulfillment_c == True , "Physical Only", IF(Channel_Digital_Distribution_c == True , " Digital Only" , "False") ) ) )
```

Question 6 : Calculate Case Age excluding weekends.

Create one formula field (returns number) which will calculate Case Age (In days) such that it will keep incrementing until case is closed. If the case is closed it will stop counting. This excludes weekends.

Solution :

Hi-Level Detail

Edit Delete Clone



Owner [yogesh sharma \[Change\]](#)

Hi-Level Name	Mysql_try
Start Date	2/4/2014
End Date	3/27/2014
Age excluding weekends	45
Created By	yogesh sharma , 2/4/2014 3:38 PM

Last Modified By [yogesh sharma](#), 2/4/2014 3:38 PM

Edit Delete Clone

Formula :

Simple Formula Advanced Formula

Insert Field

Insert Operator ▼



Age excluding weekends (Number) =

```
DAY( End_Date__c )+ DAY(Start_Date__c)-CASE(MOD( Start_Date__c - DATE(1985,6,24), 7),  
0 , CASE( MOD( End_Date__c - Start_Date__c , 7),1,0,2,0,3,0,4,0,5,1,6,2,0),  
1 , CASE( MOD( End_Date__c - Start_Date__c , 7),0,0,1,0,2,0,3,0,4,0,5,2,2),  
2 , CASE( MOD( End_Date__c - Start_Date__c , 7),0,0,1,0,2,0,3,1,2),  
3 , CASE( MOD( End_Date__c - Start_Date__c , 7),0,0,1,0,2,1,2),  
4 , CASE( MOD( End_Date__c - Start_Date__c , 7),0,0,1,1,2),  
5 , CASE( MOD( End_Date__c - Start_Date__c , 7),0,1,2),  
6 , CASE( MOD( End_Date__c - Start_Date__c , 7),6,2,1),  
999)  
+  
(FLOOR(( End_Date__c - Start_Date__c )/7)*2)
```

Question 7 : Validation rules to validate email address format.

Since it is a text field, there is possibility that user will enter wrong email address for e.g.: abc2ht.com (missing '@'). is there any validation formula rule that can validate email address format can share here.?

Solution :

check for check Box Validation Rule

[Back to check for check Box](#)



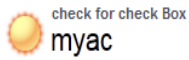
Validation Rule Detail

Edit Clone

Rule Name	ValidationForEmail	Active	<input checked="" type="checkbox"/>
Error Condition Formula	NOT(REGEX(Email_Id__c ,"[a-zA-Z0-9_-]+@[a-zA-Z]+.[a-zA-Z]{2,4}"))		
Error Message	Please Enter Valid Mail Id.	Error Location	Email Id
Description			
Created By	yogesh sharma , 1/28/2014 11:00 AM	Modified By	yogesh sharma , 1/28/2014 11:17 AM

Edit Clone

Code :



[Back to List: Custom Object Definitions](#)

[Open Activities](#) (0) | [Activity History](#) (0)

check for check Box Detail

[Edit](#) [Delete](#) [Clone](#)

check for check Box Name myac

Owner [yogesh sharma](#) [\[Change\]](#)

Email Id **Chandra@bisp.com**

Created By [yogesh sharma](#), 1/28/2014 11:25 AM

Last Modified By [yogesh sharma](#), 1/28/2014 11:25 AM

[Edit](#) [Delete](#) [Clone](#)

Question 8 : Limit number of selections from multi-select picklist.

There a way to restrict users to only picking 3 selections from a multi-select picklist that contains 20 options?

Solution 8 :

City Edit [Save](#) [Save & New](#) [Cancel](#)

Error: Invalid Data.
Review all error messages below to correct your data.

Information

City Name Owner yogesh sharma

Multi_Picklist **Error: Only Select Three Option.**

Available	Chosen
E	A
F	B
G	C
H	D
I	

[Save](#) [Save & New](#) [Cancel](#)



City Detail

[Edit](#) [Delete](#) [Clone](#)

City Name myac

Multi_Picklist A; B; C

Created By [yogesh sharma](#), 2/5/2014 2:25 PM

[Edit](#) [Delete](#) [Clone](#)

Validation Rule Detail

Edit Clone



Rule Name	MultiSelect	Active	<input checked="" type="checkbox"/>
Error Condition Formula	IF(INCLUDES(Multi_Picklist__c, "A"),1,0) + IF(INCLUDES(Multi_Picklist__c, "B"),1,0) + IF(INCLUDES(Multi_Picklist__c, "C"),1,0) + IF(INCLUDES(Multi_Picklist__c, "D"),1,0) + IF(INCLUDES(Multi_Picklist__c, "E"),1,0) > 3		
Error Message	Only Select Three Option.	Error Location	Multi_Picklist
Description			
Created By	yoqesh sharma, 2/5/2014 2:24 PM	Modified By	yoqesh sharma, 2/5/2014 2:24 PM

Edit Clone

Code :

```
IF(INCLUDES(Multi_Picklist__c, "A"),1,0) +  
IF(INCLUDES( Multi_Picklist__c, "B"),1,0) +  
IF(INCLUDES( Multi_Picklist__c, "C"),1,0) +  
IF(INCLUDES( Multi_Picklist__c, "D"),1,0) +  
IF(INCLUDES( Multi_Picklist__c, "E"),1,0) > 3
```

Question 9 : Validation rule text field allows [a-z][A-Z] and space bar.

Create one custom text(Text01__c) field. This field allows characters [a-z][A-Z] and space bar only. Any formula or validation rule or workflow rule. It not allows numeric's [0-9] and special character.

Solution :

```
NOT(REGEX(Text01__c, "[a-zA-Z ]*"))
```

Question 10 : Number of days between Event and CloseDate.

Calculate how many days it takes from visiting the customer until the opportunity is closed. We use events only for these visits, so every account only has one event. What I need to do is to copy the date of this event either to an opportunity or account to add another custom field to calculate the days between start date (I already cloned this field in the event to use it in formulas) and close date.

Another problem is, that CloseDate is only Date and not DateTime like my cloned StartDate. Any chance to calculate it anyway.?

Solution : Here Apex Trigger Code.

Is Active 

```
1 trigger EventDateOnAcc on Event (after insert, after update) {
2
3 Set <ID> acctIDs = new Set <ID> ();
4 List<Event> usableEventList = new List<Event>();
5
6 for (Event e: Trigger.new) {
7     if (e.AccountId != null && e.z_Thema__c != null & e.z_Thema__c.indexOf('Demotermin')==0) {
8         acctIDs.add(e.accountID);
9         usableEventList.add(e);
10    }
11 }
12
13 if (acctIds.size() > 0) {
14
15     Map<ID, Account> acctMap = new Map<ID, Account> ((Select ID, Termin_am__c from Account where ID in :acctIDs));
16     List<Account> changedAccounts = new List<Account>();
17
18     for (Event e : UsableEventList) {
19         Account a = acctMap.get(e.AccountId);
20
21         If (a.Termin_am__c == null || a.Termin_am__c < e.endDateTime) {
22             a.Termin_am__c = e.endDateTime;
23             changedAccounts.add(a);
24         }
25     }
26
27     if (changedAccount.size() > 0)
28         update changedAccounts;
29 }
30 }
```

Position: Ln 30, Ch 2 Total: Ln 30, Ch 786

Apex Class : Here you can write apex test class.

```

1 @IsTest
2 private class TestEventDateOnAccTrigger {
3
4 @IsTest
5 static void test () {
6
7     Account acc = new Account (Name='Test Account');
8     insert acc;
9
10    Event evt = new Event (<... set fields here>);
11    insert evt;
12
13    evt.endDateTime = DateTime.newInstance (<set new time here>);
14    update evt;
15
16 }
17 }
18

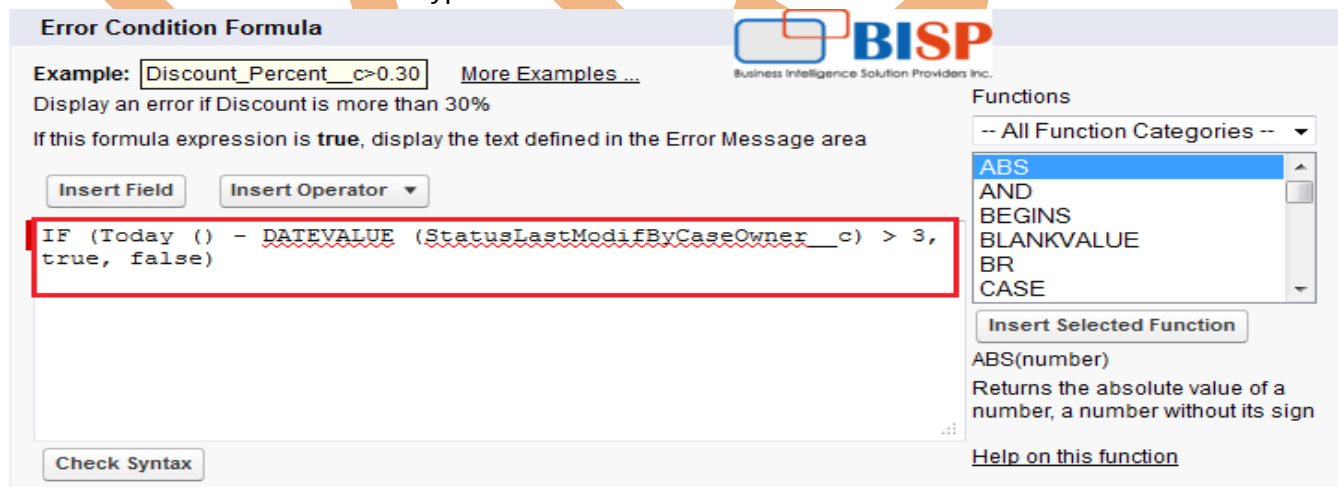
```

Question 11 : Last modified date workflow rule.

Created a custom field on Case object Last modified by owner date/time. I also created a formula field and a workflow rule to insert date and time whenever Only the Case Owner modify the status field. Now i am trying to create another workflow rule that if Case Owner doesn't modify case status with in 3 days then it should send email notification to manager that the status of this case hasn't been changed by case owner in last 3 days.

Solution :

1. Create a formula field / return type checkbox on case.



Error Condition Formula

Example: `Discount_Percent__c > 0.30` [More Examples ...](#)

Display an error if Discount is more than 30%

If this formula expression is **true**, display the text defined in the Error Message area

`IF (Today () - DATEVALUE (StatusLastModifByCaseOwner__c) > 3, true, false)`

Functions

-- All Function Categories --

- ABS
- AND
- BEGINS
- BLANKVALUE
- BR
- CASE

ABS(number)
Returns the absolute value of a number, a number without its sign

[Help on this function](#)

2. Create a workflow rule with entry criteria: above checkbox is true - add wf rule - email to send the notification

Question 12: Create a formula field, which will be updated based on two other fields.

In Leads Page, I want to have a Sales Score Text field (formula field), which needs to be updated by first checking the campaign field is empty or not and has to update the Sales Score field based on other Campaign Score field (Number field).

Solution :

The screenshot shows a 'City Edit' form with the following fields: City Name (myac), Campaign_Field_Name (empty), and Campaign_Score_Field (125487). A red error message is displayed below the Campaign_Field_Name field: 'error : Campaign field name is empty'. The BISP logo is visible in the top right corner.

The screenshot shows the formula editor interface. At the top, there are buttons for 'Insert Field' and 'Insert Operator'. The formula text area contains: `IF(ISBLANK(Campaign_Field_Name __c), Campaign_Score_Field __c , "NA")`. A red box highlights the formula text. Below the text area is a 'Check Syntax' button. The BISP logo is visible in the bottom right corner.

Code :

```
IF(ISBLANK(Campaign_Field_Name __c),Campaign_Score_Field __c,"NA")
```

Question 13 : validation rule field should be null.

Have a checkbox field Checkbox1__c and two text fields TextField1__c and TextField2__c this validation rule doesn't work: IF(Checkbox1__c== false, TextField1__c= null && TextField2__c= null, TextField1__c= null && TextField2__c= null).

Want to create a validation rule that when Checkbox1__c is unchecked, the TextField1__c and TextField2__c should have no values.

Solution :

The screenshot shows a form with three fields: Checkbox1 (unchecked), TextField1 (hyb), and TextField2 (india). A red error message is displayed above the TextField1 field: 'Error: Please check Checkbox1.'. The BISP logo is visible in the top right corner. At the bottom, there are buttons for 'Save', 'Save & New', and 'Cancel'.

Validation Rule Detail

Edit Clone



Rule Name	Check_checkbox	Active	<input checked="" type="checkbox"/>
Error Condition Formula	AND(Checkbox1__c == FALSE , NOT(AND(ISBLANK(TextField1__c) , ISBLANK(TextField2__c))))		
Error Message	Please check Checkbox1.	Error Location	Checkbox1
Description			
Created By	yogesh sharma, 2/10/2014 8:53 AM	Modified By	yogesh sharma, 2/10/2014 8:55 AM

Edit Clone

Code :

```
AND( Checkbox1__c == FALSE , NOT( AND( ISBLANK( TextField1__c ) , ISBLANK( TextField2__c ) ) ) )
```

Question 14 : How can I split custom Customer Name text field into First Name and Last Name.

We have Contact us (web2lead) form on our company website. In that contact us form we have asked only four fields Name, Email, Phone and State. Name field is feeding custom Customer Name field (Type Text , size = 255), Email field is feeding Standard Email field, Phone is feeding Standard Phone field and State is feeding Standard State/Province field in SalesForce. I am trying to make a workflow field update that split Customer Name and feed First name and Last name Standard fields

Solution :



City Edit Save Save & New Cancel

Information

City Name Owner yogesh sharma

Name

Email

Phone

State

Save Save & New Cancel

Formula For First Name:

Simple Formula | Advanced Formula

Insert Field | Insert Operator

Business Intelligence Solution Providers Inc. **BISP**

First Name (Text) =

```
TRIM(LEFT( Customer_Name__c, FIND(" ", Customer_Name__c) ) )
```

Formula For Last Name :

Simple Formula | Advanced Formula

Insert Field | Insert Operator

Business Intelligence Solution Providers Inc. **BISP**

Last Name (Text) =

```
RIGHT(Customer_Name__c ,LEN(Customer_Name__c) - FIND(" ", Customer_Name__c) )
```

After Save This Data :

City Detail

Edit | Delete | Clone

City Name	myac
Name	mac smith
Email	mac@bisp.com
Phone	234356
State	Delaware
First Name	mac
Last Name	smith
Created By	yogesh sharma, 2/10/2014 9:23 AM

Edit | Delete | Clone

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Question 15 : Formula Field to counts events for a company

Creating a formula that counts events for a company. The hitch is - if the "meeting type" field (which is a custom picklist) on the activity record is "conference call" or "web meeting" - I do not want it to count it.

I put together the formula below - but it does not seem to be working. Any help would be very appreciated.

```
IF( AND(Activity_Type__c = "Event", OR( NOT( ISPICKVAL(Meeting_Type__c, "Conference Call")), NOT(ISPICKVAL(Meeting_Type__c, "Web Conference"))))) , 1, 0)
```

Activity_Type__C is a text formula field that will either be "Event" or "Task".

Solution :

City Edit [Save] [Save & New] [Cancel]

Information

City Name: myac
Activity Type: Event
Meeting Type: conference call

[Save] [Save & New] [Cancel]

City Detail [Edit] [Delete] [Clone]

City Name: myac
Activity Type: Event
Meeting Type: conference call
Curenter: 0.00
Created By: yqgsh.sharma, 2/10/2014 11:09 AM

[Edit] [Delete] [Clone]

City Edit [Save] [Save & New] [Cancel]

Information

City Name: EmployeeDetail
Activity Type: Event
Meeting Type: Sales

[Save] [Save & New] [Cancel]

City Detail [Edit] [Delete] [Clone]

City Name: EmployeeDetail
Activity Type: Event
Meeting Type: Sales
Curenter: 1.00
Created By: yqgsh.sharma, 2/10/2014 11:34 AM

[Edit] [Delete] [Clone]

Formula :

Simple Formula | **Advanced Formula**

[Insert Field] [Insert Operator]

BISP
Business Intelligence Solution Providers Inc.

Curenter (Number) =

`IF(AND(Activity_Type__c = "Event", NOT(OR(ISPICKVAL(Meeting_Type__c, "Conference Call"), ISPICKVAL(Meeting_Type__c, "Web Conference")))), 1, 0)`

Code :

```
IF( AND(Activity_Type__c = "Event", NOT(OR(ISPICKVAL(Meeting_Type__c, "Conference Call"), ISPICKVAL(Meeting_Type__c, "Web Conference")))), 1, 0)
```

Question 16 : Calculate week of the month.

What I actually want is suppose if I have 52 records created with the start date and end dates like.. 1st... 1/1/2014 to 8/1/2014. 2nd ... 8/1/2014 to 15/1/2014 and so on.
so I want to calculate that what is the number of week like.... 1st week , 2nd week and so on..

Solution :

City Detail

Edit Delete Clone



City Name	EmployeeDetail
Start Date	2/12/2014
Close date	2/19/2014
Number of Weeks	2.00
Created By	yogesh sharma, 2/10/2014 11:55 AM

Edit Delete Clone

Formula :

Simple Formula

Advanced Formula

Insert Field

Insert Operator



Number of Weeks (Number) =

```
CEILING( ( Start_Date__c - DATE( YEAR( Start_Date__c ), Month( Start_Date__c ), 1) + 1) / 7)
```

Code :

```
CEILING( ( Start_Date__c - DATE( YEAR( Start_Date__c ), Month( Start_Date__c ), 1) + 1) / 7)
```

Question 17 : Remove white spaces between two words in formula.

We currently have a workflow that creates a "dummy" email address when an email address is not provided in a lead or contact record. The business requirement is for the email address to be FirstName.LastName@Company.nomail. The problem we're running into is that the email fields do not like any spaces in the email address, which is a problem for companies with multiple words in their name.. i.e. Some Burger Corp. Contact names also cause the same issue.

The workflow uses a simple formula to set the value: FirstName + "." + LastName + "@" + Company + "." + "nomail"

Is there a way to remove all white spaces in a concatenation formula?

Solution :

City Detail

Edit Delete Clone



City Name	myac
FirstName	abc
LastName	xyz
Company	bisp
Email Id	abc.xyz@bisp.nomail
Created By	yogesh sharma, 2/10/2014 3:10 PM

Edit Delete Clone

Formula :

Simple Formula **Advanced Formula**

Insert Field Insert Operator ▼

Email Id (Text) =

```

SUBSTITUTE( FirstName__c , " ", "")+"."+ SUBSTITUTE( LastName__c , " ", "")+"@"+ SUBSTITUTE(
Company__c , " ", "") +". "+ "nomail"

```

Code :

```

SUBSTITUTE( FirstName__c , " ", "")+"."+ SUBSTITUTE( LastName__c , " ", "")+"@"+
SUBSTITUTE( Company__c , " ", "") +". "+ "nomail"

```

Question 18: Writing complex validation rule.

If Estimated value = null
and Status picklist value =faxed
and date fax sent is greater than 11/1/2013
here's what i wrote so far, but i seem to have an error somewhere as when i try to save a lead with the first 2 criterias but date fax sent older than 11/1/2013 i still get validated and cannot save lead.

Solution :

City Detail Edit Delete Clone

City Name	myac
Estimated Value	abc
Status	Faxed
Date Fax Sent	2/12/2014

Created By yogesh sharma, 2/10/2014 3:36 PM Edit Delete Clone

Validation Rule Detail Edit Clone

Rule Name	ValidationForEmail	Active	<input checked="" type="checkbox"/>
Error Condition Formula	AND(ISBLANK(Estimated_Value__c) , ISPICKVAL(Status__c , "Faxed"), (Date_Fax_Sent__c > DATE(2014,2,11)))		
Error Message	Please check Status or Date.	Error Location	Status
Description			
Created By	<u>yogesh sharma</u> , 2/10/2014 3:29 PM	Modified By	<u>yogesh sharma</u> , 2/10/2014 3:31 PM

Edit Clone

Code :

```

AND( ISBLANK( Estimated_Value__c ) ,
ISPICKVAL( Status__c , "Faxed"),
( Date_Fax_Sent__c > DATE(2014,2,11)))

```

Question 19 : Contact Roles Required Conditional Rules.

Started using the Contact Roles Required for app, and I've setup the condition rule to include : AND ((CreatedDate <NOW()),NOT(Primary_Contact_Assigned__c)) but this is creating havoc on our team since this rule forces you to add a primary contact role to all opportunities, even those from 5 years ago. So now I'm trying to create a conditional rule that will require a primary contact role for opportunities created as of 1/1/2013.

Solution :

City Edit

Save Save & New Cancel


Information

City Name

CreatedDate [2/10/2014]

Primary Contact Assigned

Save Save & New Cancel



Validation Rule Detail

Edit Clone

Rule Name	MC	Active	<input checked="" type="checkbox"/>
Error Condition Formula	AND ((DATEVALUE(CreatedDate) > DATE(2014, 01, 02)),NOT(Primary_Contact1__c))		
Error Message	Check Date Field...	Error Location	CreatedDate
Description			
Created By	yogesh sharma, 2/10/2014 4:27 PM	Modified By	yogesh sharma, 2/10/2014 4:28 PM

Edit Clone

