

Bypasses

We reference "bypasses" in a number of these conventions.

Bypasses are administrator-defined checkboxes that allow you to massively deactivate automations and validation rules with a simple click. They avoid that awkward feeling when you realize that you need to turn them off one by one so you can do that huge data update operation you're planning.

If your validation rules bypasses look like this, this is bad:

```
$Profile.id <> '00eo000000KXdC' && somefield__c = 'greatvalue'
```

The most maintainable way to create a bypass is to create a hierarchical custom setting to store all the bypass values that you will use. This means that the custom setting should be named "Bypasses", and contain one field per bypass type that you want to do.

Great-looking bypass setup right there

Custom Setting Definition
Bypasses

Create the fields for your custom setting. The data in these fields are cached with the application.

Custom Setting Definition Detail [Edit] [Delete] [Manage]

Label	Bypasses	Object Name	Bypasses
API Name	Bypasses__c	Setting Type	Hierarchy
Visibility	Public	Description	Contains bypasses for validations, workflows, triggers
Namespace Prefix		Created Date	07.07.2019 12:59
Last Modified Date	07.07.2019 12:59	Record Size	150

Custom Fields [New]

Action	Field Label	API Name	Data Type	Indexed	Modified By
[Edit] [Del]	Bypass Emails	IsBypassEmails__c	Checkbox		07.07.2019 13:02
[Edit] [Del]	Bypass Invoicing Processes	IsBypassInvoicing__c	Checkbox		07.07.2019 13:02
[Edit] [Del]	Bypass Triggers	IsBypassTriggers__c	Checkbox		07.07.2019 13:01
[Edit] [Del]	Bypass VR	IsBypassVR__c	Checkbox		07.07.2019 13:01
[Edit] [Del]	Bypass WF	IsBypassWF__c	Checkbox		07.07.2019 13:01

This setup allows you to create bypasses either by profile or by user, like so:

Bypasses Edit

Provide values for the fields you created. This data is cached with the application.

Edit Bypasses [Save] [Cancel]

Bypasses Information

Location: [Profile] [User]

Bypass Triggers: []

Bypass WF: []

Bypass VR: []

Bypass Emails: []

Bypass Invoicing Processes: []

This allows you to reference bypasses directly in your validation rules by simply letting Salesforce handle knowing whether or not the bypass is active or not for that specific user or profile. In the validations themselves, using this bypass is as easy as referencing it via the formula builder. An example for validation rules could be:

```
! $Setup. Bypasses__c. IsBypassVR__c && Name = "test"
```

As you can also see in the above screenshots, you can use a single custom setting to host all the bypasses for your organization, including Validation Rules, Workflows, Triggers, etc. As additional examples, you can see that "Bypass Emails" and "Bypass Invoicing Process" are also present in the custom setting - adding the check for these checkboxes in the automations that trigger emails, and automations that belong to Invoicing respectively, allow partial deactivation of automations based on criteria.

Revision #4

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