Validate Actions

A Validate action is used to generate an error message and either reject or allow the user to accept the change if the record meets specified search conditions. These conditions are defined on the Condition tab of the Rule wizard if the action is included in a rule, or they may be defined in the logic of an If-Then-Else action if the action is contained there. The admin who creates the action provides the action name, a description of the purpose of the validation action, then writes a custom error message that users will see when the validation is triggered. The error message should explain to the user what to do in order to save the record.

Create a Validate Action

You can access the Actions wizard in several ways, but the easiest way is to select Setup [Table] from the table where you want to create the action.

1. From the top nav bar, expand the table's drop-down and select Setup [Table].
2. Select the Actions tab in the Table wizard.
3. Click Create Validate Action.
4. Name your action. Give it a description and an error message.
5. Select whether the action should prevent record saving, or allow the user to save by confirming the dialog. If you allow the user to save, you can also edit the text that appears on the buttons in the pop-up.

   > ⚠ Once your action is saved the system automatically adds a V: before your given title to distinguish the action as Validate.

6. Click Finish to save the action.