

**\*\*\*The following is an example on how to create validation rules to prevent deletion and edit for Enhanced Attachment records. Please test any changes in a sandbox environment before implementing any validation rules.**

## **Prevent Editing of attachments with specific categories when Opportunity is Closed Won**

To prevent edit of an attachment record when the parent opportunity stage is at Closed Won, you can simply create a validation rule against the Enhanced Attachment custom object. Since the custom object is associated to the Opportunity object via lookup relationship the validation rule can be written to check if the Opportunity Stage is at the Closed Won status.

[Back to Enhanced Attachment](#)

**Validation Rule Detail** Edit Clone

Rule Name	Lock_Edit_at_Opp_Stage_Closed_Won	Active	<input checked="" type="checkbox"/>
Error Condition Formula	ISPICKVAL(Opportunity__r.StageName, "Closed Won")		
Error Message	No Edits are allowed when the Opportunity Stage is at Closed Won.	Error Location	Top of Page
Description			

Once the Validation rule is active any edits to attachment records that is related to an Opportunity at the closed won stage will result in the following error message.

[EDGE EMERGENCY GENERATOR](#) > [EDGE ADDENDUM](#)

Error: No Edits are allowed when the Opportunity Stage is at Closed Won.

Edit Attachment - Edge Addendum Save Cancel

Attachment Name

Edge Addendum

Attachment Category

Sales Contract ▼

## Prevent Deletion of attachment records when opportunity is at Closed Won Stage

**\*\*\*Note that the following validation rule example will be available in the upcoming release of Enhanced Attachment so final functionality may vary.**

To prevent deletion of attachments of a specific category a validation rule can be used in conjunction of the [category rollup count feature](#) of the app. Once a field has been created on the Opportunity object to store the count of number of attachment of a specific category we can proceed to create a validation rule against the Opportunity object.

### Opportunity Validation Rule

[Back to Opportunity Validation Rules](#)

**Validation Rule Detail** Edit Clone

Rule Name	Prevent_Sales_Contract_Deletion	Active	✓
Error Condition Formula	AND( ISPICKVAL(StageName, "Closed Won"), ISCHANGED(Number_of_Sales_Contract__c) )		
Error Message	Deletion of Sales Contract is not allowed if Stage is Closed Won	Error Location	Top of Page
Description			

The rule checks if the Stage is at Closed Won and if the field that stores the rollup count value has been changed. As long as the rollup count has been enabled for the opportunities and for the category then deletion of those records will be prevented.

Error during rollup: Update failed. First exception on row 0 with id 00641000004G8sAAC; first error: FIELD\_CUSTOM\_VALIDATION\_EXCEPTION, Deletion of Sales Contract is not allowed if Stage is Closed Won: []

Home Attachment Categories **Enhanced Attachments** Attachment Migration Tool Attachment Migration Requests Attachment Settings Enhanced Attachment Keys +

Search

Search All

Limit to items I own [Advanced Search...](#)

Confirm Delete of Attachment 'Edge Addendum' ?