

Sometimes when creating fields on an Object in Salesforce, we want to reference data in another area, either on the same Object or a separate Object. We can achieve this with Lookup filters on a Lookup field.

**Lookup field:** as the name suggest, Lookup fields look up to another field or object to pull data down from that field.

You might be wondering when you would use a Lookup field; you see examples across even the standard out-of-the-box Salesforce Org; one example is Account Owner on Contact Object, which shows who owns the Account for the company name. This information is not repeated over every Object, and the field uses a Lookup field to the Account Object. Another example would be creating a Custom Object, and you want to pull the Account Name, so you create a Lookup field with a Lookup Filter to the Account Object.

In today's example, we will look up the Account Object and search for a specific Record Type on the Account Object.

### Example Information

In this example, we will be working in my developer org for a fictitious music label and creating a field on the Show Object that allows us to pick the Venue where the show is being held out. In this Org, Venue is its Record Type on the Account Object. Below is a step-by-step guide on how I created this.

We first need to pull up the Object we will be working on in the Object Manager and create a new Field under the Fields & Relationships link on the Show Custom Object. To do that, I take the following path in my Salesforce Org.

- **Setup**
- **Object Manager**
- **Show** (my Custom Object)
- **Fields & Relationships**
- **New**

This will pull up the **New Custom Field Page**

Once we are on the New Custom Field page, we will select the Data Type for the field we are creating. In this case, it is a Lookup Relationship.

# How to Create a Lookup Filter on a Lookup Field in Salesforce

The screenshot shows the Salesforce 'New Custom Field' page. The page is titled 'New Custom Field' and shows 'Step 1. Choose the field type'. The 'Data Type' section is expanded, showing various options. 'Lookup Relationship' is selected and highlighted with a red box. The page includes a sidebar with navigation links like 'Details', 'Fields & Relationships', 'Page Layouts', etc. The top navigation bar shows 'Setup', 'Home', and 'Object Manager'.

Step 1. Choose the field type

Specify the type of information that the custom field will contain.

**Data Type**

☐ None Selected

Select one of the data types below.

☐ Auto Number

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

☐ Formula

A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

☐ Roll-Up Summary <sup>1</sup>

A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

☒ Lookup Relationship

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

☐ Master-Detail Relationship

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

☐ External Lookup Relationship

☐ Checkbox

Allows users to select a True (checked) or False (unchecked) value.

☐ Currency

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

☐ Date

Allows users to enter a date or pick a date from a popup calendar.

☐ Date/Time

Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

☐ Email

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

☐ Geolocation

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

☐ Number

Allows users to enter any number. Leading zeros are removed.

☐ Percent

Allows users to enter a percentage number, for example, "10" and automatically adds the percent sign to the number.

☐ Phone

Allows users to enter any phone number. Automatically formats it as a phone number.

☐ Picklist

Allows users to select a value from a list you define.

☐ Multi-Select Picklist

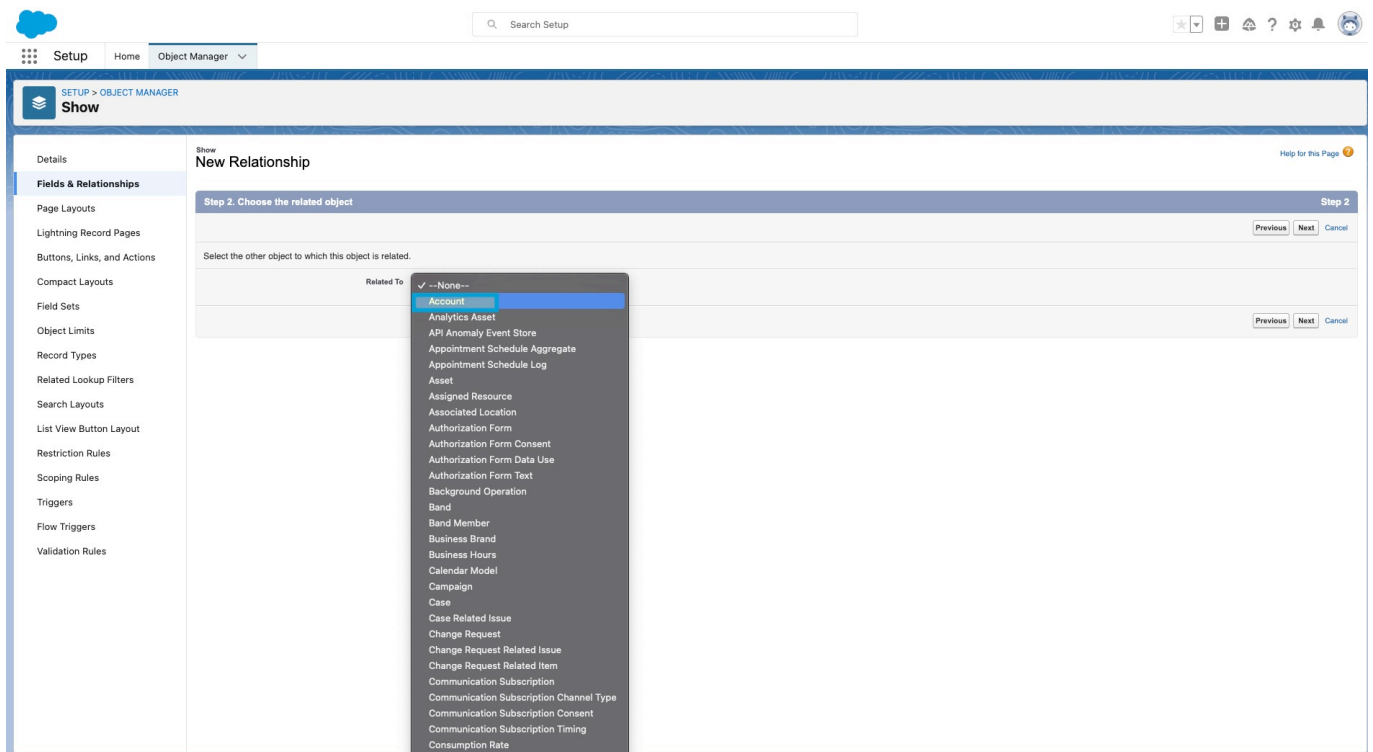
Allows users to select multiple values from a list you define.

New Custom Field Page

Click **Next**

Now we get to create our new Relationship between Objects in our Salesforce Org. For this example, we want to look at the Account Object since the information we want to grab is on the Account Object with its Record Type.

## How to Create a Lookup Filter on a Lookup Field in Salesforce



New Relationship Screen – in this example, we will choose **Account**

Choose: **Account**

Click **Next**

### Field Details Screen

In this screen, we enter all the details about the field: label, name, description, and **help text**, and this is the screen we add the **Filter** for the field on the Record Type: Venue on Account Object.

## How to Create a Lookup Filter on a Lookup Field in Salesforce

Show

### New Relationship

Step 3. Enter the label and name for the lookup field

**Step 1** Field Label

**Step 2** Field Name

**Step 3** Description

**Step 4** Help Text

Child Relationship Name

Required ☐ Always require a value in this field in order to save a record

What to do if the lookup record is deleted? ☒ Clear the value of this field. You can't choose this option if you make this field required.

☐ Don't allow deletion of the lookup record that's part of a lookup relationship.

Auto add to custom report type ☒ Add this field to existing custom report types that contain this entity

#### Lookup Filter

Optionally, create a filter to limit the records available to users in the lookup field. [Tell me more!](#)

► [Show Filter Settings](#)

**Step 5**

1. Field Label: **Venue**
2. Field Name: **Venue**
3. Description: ***What Venue is the event being held?***
4. Help Text: **What is the Venue the Event is being held?**
5. Lookup Filter: Click the link to enter the filter fields

After we fill in all the information about our fields, like the label and description, we get to create the Filter. Next, click on **Show Filter Settings**

In this screen, we will start adding the criteria to our Filter

© Copyright 2022 - James Derflinger - [www.jderflinger.com](http://www.jderflinger.com) | 5

## Adding Filter Criteria

**Account: Account Record Type: Record Type Name**

© Copyright 2022 - James Derflinger - [www.iderflinger.com](http://www.iderflinger.com) | 6

## The filter path to Record Type Name

The last part is filling in the ***Operator, choosing Value***, and adding the name of our Record Type, which in this example is Venue. It should look like this when done.

# How to Create a Lookup Filter on a Lookup Field in Salesforce

The screenshot shows the 'Lookup Filter' configuration page in Salesforce. At the top, the 'Field Label' and 'Field Name' are both set to 'Venue'. The 'Description' is 'What Venue is this event being held at?' and the 'Help Text' is 'What is the Venue the event is being held at?'. Below this, the 'Child Relationship Name' is 'Shows2'. The 'Required' checkbox is checked, and the 'What to do if the lookup record is deleted?' option is 'Clear the value of this field. You can't choose this option if you make this field required.' The 'Auto add to custom report type' checkbox is also checked. The 'Lookup Filter' section is expanded, showing 'Filter Criteria' with a table: |Field|Operator|Value / Field|, where the first row is '|Account: Account Record Type: Reco|equals|Value |Venue|'. The 'Filter Type' is set to 'Required. The user-entered value must match filter criteria.' and the 'Active' checkbox is checked.

Field Label: Venue

Field Name: Venue

Description: What Venue is this event being held at?

Help Text: What is the Venue the event is being held at?

Child Relationship Name: Shows2

Required: ☒ Always require a value in this field in order to save a record

What to do if the lookup record is deleted?: ☒ Clear the value of this field. You can't choose this option if you make this field required.

Auto add to custom report type: ☒ Add this field to existing custom report types that contain this entity

### Lookup Filter

Optionally, create a filter to limit the records available to users in the lookup field. [Tell me more!](#)

▼ Hide Filter Settings

Filter Criteria: Insert Suggested Criteria

Field	Operator	Value / Field
Account: Account Record Type: Reco	equals	Value  Venue

AND: [Begin typing to search for a field...] --None-- Value

Add Filter Logic...

Filter Type: ☒ Required. The user-entered value must match filter criteria.

If it doesn't, display this error message on save: Value does not exist or does not match filter criteria. [Reset to default message](#)

☐ Optional. The user can remove the filter or enter values that don't match criteria.

Lookup Window Text: Add this informational message to the lookup window.

Active: ☒ Enable this filter.

## Completed Filter

Now you need to click:

- **Next**
- **Next**
- **Save**

Now you have created a Cross-Object Lookup Field.