

Salesforce: Lookup Options in Lookup Relationship

When you create a lookup relationship from child to parent, there are a few option you can configure.

What to do if the lookup record is deleted?

1. Clear the value of this field

This would be the default option. Relationship between parent and child would be very loose. You can delete the parent or child without affected each other.

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.

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

This option will not allow user to delete parent record when it have child records. But, deleting child record will have no issue.

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.

Screenshot below show how the system will response upon deletion of parent with child record.

Your attempt to delete 4 ke 1 could not be completed because it is associated with the following 5th level invoices. If the following table is empty, it is because you do not have access to the records restricting the delete.

5th Level Invoice Name
5 ke 1

4 ke 1 is parent record ; 5 ke 1 is child record ; 5th level invoices is child object

There is also an option for **Required** - *Always require a value in this field in order to save a record*. By selecting this option, every child need to have a parent record upon record creation or update. This also mean, not allowing parent record deletion if it has child. Therefore, once this option is selected, only option (2) above Don't allow deletion of the lookup record that's part of a lookup relationship will be available.

5th Level Invoice Edit

New 5th Level Invoice

5th Level Invoice Edit

Save

Save & New

Cancel

Information

5th Level Invoice Name

4th Level Invoice

If you have requirement to delete all child records once parent record is deleted, this is not covered in any of above scenarios using out of the box feature in Lookup relationship. One of the option is to change the relationship from Lookup to Master-Detail relationship.