



Criteria-Based Search and Filter



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Criteria-Based Search and Filter

Use Criteria-Based Search and Filter to design a search experience for your users. You can configure a search based on a single object that unifies complex sets of data, such as inventory and aggregated customer information that's otherwise spread across multiple objects and fields. Criteria-Based Search and Filter can be customized to meet varied business requirements.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Automotive Cloud, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, Nonprofit Cloud for Grantmaking, and Public Sector Solutions. View edition availability. [View edition availability](#).

How Criteria-Based Search and Filter Works

Design the search experience that your users need. Users often search for information that isn't stored in a single object, so their visibility into complex sets of data is limited. With Criteria-Based Search and Filter, you can configure a search based on a single searchable object that combines data that is spread across multiple objects and fields. For example, you can choose which fields users can select for the search and how they can view and act on the results. You can also include distance parameters to define the scope of the search.

Criteria-Based Search and Filter Editions and Permissions

Review the supported products, editions, and required permissions for Criteria-Based Search and Filter.

Considerations for Using Criteria-Based Search and Filter

Review these considerations before you implement and use Criteria-Based Search and Filter.

Set Up Criteria-Based Search and Filter

Turn on settings for Criteria-Based Search and Filter. Define the search criteria and parameters to build a search experience, and define the types of actions that users can take on search results. Configure the searchable object, and use a Data Processing Engine definition or another mechanism to transform data in the object.

Use Criteria-Based Search and Filter

Get visibility into complex sets of data, such as inventory and aggregated customer information. Search for records using multiple criteria or any part of a word, filter the results, view results on a map, and take actions on the records that match your criteria. CBSF provides a more intuitive and reliable search experience with consistent data display and clear visibility into when data was last updated.

How Criteria-Based Search and Filter Works

Design the search experience that your users need. Users often search for information that isn't stored in a single object, so their visibility into complex sets of data is limited. With Criteria-Based Search and Filter, you can configure a search based on a single searchable object that combines data that is spread across multiple objects and fields. For example, you can choose which fields users can select for the search and how they can view and act on the results. You can also include distance parameters to define the scope of the search.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Automotive Cloud, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, Nonprofit Cloud for Grantmaking, and Public Sector Solutions. [View edition availability.](#)

What Is a Searchable Object?

A searchable object gathers information from multiple objects and fields that you define and consolidates the data. For example, your asset inventory data is spread across multiple objects, such as Account, Location, Product, and Asset. You want users to find a single record that shows them the name of a distributor and their address, along with the quantity of a particular product that they have in stock. Each piece of information in the resulting record is derived from different objects.

Components of Setting Up Search

There are three main parts to setting things up.

- **Search Criteria Configuration:**

Create a search criteria configuration to select fields from the searchable object for different purposes.

- Select which fields users can use as search criteria
- Select the list or card display format for search results
- Select the OmniStudio FlexCard used to display search results in a card view
- Select which fields users can view as search result display columns in a list view
- Select the type of filter criteria, grouping and aggregation or filter fields
- Select by which fields users can group and aggregate or filter search results
- Select by which fields users can sort search results
- Select what actions users can take on search results
- Select distance parameters such as the relative location field and maximum distance ranges to determine the scope of the search, and choose whether to show search results in a map

- **Searchable Object Data Sync Information:**

Create a searchable object configuration that can be used across multiple search criteria

- configurations.
- If you use a Data Processing Engine to update records in the searchable object, select an active Data Processing Engine definition.
 - Create field mappings to convert relevant search criteria fields into picklists.
 - Specify an alternative display format for filter fields.
 - Create field mappings to convert relevant search result fields in a list view into hyperlinks.
 - Select text area fields with pipe-separated values to parse.
- **Search Action Configuration:**
Configure the list of actions that users can take after they search for records.
Create multiple search action configurations to create Flow-based or Lightning Web Component-based actions.

Search Implementations

Some products provide a predefined implementation of Criteria-Based Search and Filter, and some products don't. For these products, you must manually create the configurations.

-  **Example** In Automotive Cloud, you can use a predefined searchable object and a Data Processing Engine (DPE) template to set up search for vehicle inventory. In Health Cloud, you create your own searchable object and configurations to set up search for providers. In Public Sector Solutions, you can use a predefined searchable object, a DPE template, and a predefined search criteria configuration to set up search for care providers. In Manufacturing Cloud, you create your own searchable object, configurations, and DPE definitions to set up search for asset inventory or distributor data.

Criteria-Based Search and Filter Editions and Permissions

Review the supported products, editions, and required permissions for Criteria-Based Search and Filter.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions with Automotive Cloud

Available in: **Enterprise and Unlimited** Editions with Health Cloud

Available in: **Enterprise, Unlimited, and Developer** Editions with Manufacturing Cloud

Available in: **Enterprise, Unlimited, and Developer** Editions with Nonprofit Cloud

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with Nonprofit Cloud for Grantmaking

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with Public Sector Solutions

Criteria-Based Search and Filter Permissions

Salesforce admins and users need the Use Criteria-Based Search and Filter system permission to configure and use criteria-based search and filter capabilities. The products and licenses in your org determine whether you have access to this permission and how you assign it. Typically, this permission is included in the Criteria-Based Search and Filter permission set.

Other Required Permissions

To let Salesforce admins and Analytics Cloud Integration Users transform and update data in the searchable object using Data Processing Engine (DPE), assign the Data Pipelines Base User permission set.

Users must also have the required object-level and field-level permissions for all source objects that are used in the search. Some products provide permission sets that include this object access. For example, in Automotive Cloud, the Automotive Foundation User permission set provides access to the objects and fields used in vehicle inventory search.

Customizing Permissions

If you customize this feature, such as adding fields, create a custom permission set. If you want to remove user permissions from the default permission set, create a muting permission set. Then, use permission set groups to assign users the default permission set in addition to your custom permission sets. This approach ensures users always have the latest default permissions and is an alternative to cloning permission sets.

See Also

- [Manage Permission Set Assignments](#)
- [Permission Set Groups](#)

Considerations for Using Criteria-Based Search and Filter

Review these considerations before you implement and use Criteria-Based Search and Filter.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Automotive Cloud, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, Nonprofit Cloud for Grantmaking, and Public Sector Solutions. View edition availability. [View edition availability](#).

General Considerations

- When you create criteria field mappings and result field mappings for a searchable object configuration, the mappings are applied to all configurations that use the same searchable object. If you delete the mappings for one configuration record, the mappings are deleted for all other searchable object configurations using the same object.
- The search results panel shows up to 2,000 records. If a search generates more results, only 2,000 records are shown. If you apply aggregation or filter criteria, only the 2,000 records in the results panel are filtered to match the criteria.
- In search criteria configurations that use grouping and aggregation, you can view up to 20 groups in the search results.
- Deleting records in a source object can affect the searchable object. If a record is missing in the source object, the searchable object record is either deleted or the impacted field is set to empty during the next sync job.
- To make custom objects searchable, select the **Allow Search** option in the Search Status section when you create a custom object in Setup.

Location-Based Considerations

- Manually edit the field-level security for the Location object for the System Administrator and the Analytics Integration user profiles, and enable Read access on the fields Location and Parent Location.
- The Relative Location field shows a city name, but you can also search by street name, state or province, or any other address attribute that Google Maps™ can use to extract information.
- Location fields can result in a numeric overflow during recipe ingestion and in computations when you run a Data Processing Engine definition to transform data in the searchable object. To resolve the issue, you must adjust the numeric field's precision or scale to accommodate the numeric value. Reduce the Scale value for all location-based measures in source objects and in the searchable object in Data Manager for the connection you're using.

Supported Fields and Field Types

Configuration	Supported Field Types
Search Criteria	<ul style="list-style-type: none"> Text Lookup Relationship Numeric Picklist Boolean
Search Results Display	For a list view:

Configuration	Supported Field Types
	<ul style="list-style-type: none"> • Text • Picklist • Boolean • Date Time <p>For a card view: Field types supported by OmniStudio FlexCards</p>
Search Results Grouping and Aggregation	<ul style="list-style-type: none"> • Text • Text Area
Search Results Filter Fields	<ul style="list-style-type: none"> • Text • Text Area

When selecting a search criteria field, select text-indexed fields that can yield only up to 4,000 records when used in a combination.

Composite, formula, and encrypted fields aren't supported for search.

See Also

- [Considerations for Vehicle Inventory Search in Automotive Cloud](#)
- [Considerations for Provider Search in Public Sector Solutions](#)

Set Up Criteria-Based Search and Filter

Turn on settings for Criteria-Based Search and Filter. Define the search criteria and parameters to build a search experience, and define the types of actions that users can take on search results. Configure the searchable object, and use a Data Processing Engine definition or another mechanism to transform data in the object.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Automotive Cloud, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, Nonprofit Cloud for Grantmaking, and Public Sector Solutions. View edition availability. [View edition availability](#).

[Enable Criteria-Based Search and Filter](#)

Turn on the settings to configure and use Criteria-Based Search and Filter.

[Transform and Update Searchable Records](#)

Keep the data in your searchable object updated so that users always get the most relevant search records. You can use different mechanisms to populate the data in the searchable object.

Configure a Searchable Object

Use a searchable object to convert disparate pieces of data into a single searchable format. You can select a Data Processing Engine definition to transform the pieces of information across multiple objects and fields and populate the searchable object with the consolidated data. You can also map fields from source objects to fields on the searchable object to create picklists and hyperlinks that improve the search experience.

Set Up Search Actions in Criteria-Based Search and Filter

Define the actions that users can take on search results. Create actions and set up prebuilt actions for your search configurations. Users can select multiple search results and apply an action from the Criteria-Based Search and Filter component.

Configure the Search Criteria for a Searchable Object

Help your users quickly search for records based on multiple criteria and decide how they view the results and what actions they can take.

Add the Criteria-Based Search and Filter Component to a Page

Add the Criteria-Based Search and Filter component to any standard or custom Lightning page. Users can use the component to search for records by multiple criteria, view and aggregate the results, and then take actions on the results.

Add the Criteria-Based Search and Filter Component to an Experience Cloud Site

Enrich the search experience for customers and business partners. Give authenticated and guest users the ability to search for records by multiple criteria, aggregate or filter the results, and then take actions on the results. Add style to your search page by applying a theme with fonts and colors that match your site design or brand.

Enable Criteria-Based Search and Filter

Turn on the settings to configure and use Criteria-Based Search and Filter.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Automotive Cloud, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, Nonprofit Cloud for Grantmaking, and Public Sector Solutions. View edition availability. [View edition availability](#).

USER PERMISSIONS NEEDED

To turn on criteria-based search and filter and data pipelines:

Criteria-Based Search and Filter permission set

AND

Data Pipelines Base User permission set

1. From Setup, in the Quick Find box, enter *Criteria*, and then select **Criteria-Based Search and Filter**.
2. Turn on **Criteria-Based Search and Filter (CBSF)**.
3. Turn on **CBSF Any Word Search** to search inventory using any part of a word.
4. From Setup, in the Quick Find box, enter *Data Pipelines*, and then select **Get Started**.
5. Turn on **Data Pipelines**.

Enable other features that give you access to the source objects used in the search. For example:

- In Automotive Cloud, if you're using Criteria-Based Search and Filter for configuring vehicle inventory search, enable Automotive.
- In Health Cloud, if you're using it to configure provider search in Health Cloud, enable Standard Provider Search Data Sync and set up healthcare practitioner and facility data.
- In Public Sector Solutions, if you're using it to configure provider search in Public Sector Solutions, enable provider, program, and benefit management settings.

Transform and Update Searchable Records

Keep the data in your searchable object updated so that users always get the most relevant search records. You can use different mechanisms to populate the data in the searchable object.

REQUIRED EDITIONS

Available in: Lightning Experience

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Depending on where the searchable records are stored, use one of these methods.

- If your data is stored across multiple objects in Salesforce, use a Data Processing Engine (DPE) definition to transform the data and write back the results to the searchable object. To help you get started, some products provide a predefined DPE definition. When you create a searchable object configuration, select the searchable object. Use a scheduled flow or directly run the DPE definition from the builder to regularly synchronize the data in the searchable object.
- If your searchable data is stored in an external system, use an integration technique or standard Salesforce method, such as Bulk API or Data Loader, to transfer the data at regular intervals.
- If the searchable object is a standard or custom object that doesn't depend on other objects to get the source data, you don't need an update mechanism. Instead, create records for the object that forms the basis for search.

Configure a Searchable Object

Use a searchable object to convert disparate pieces of data into a single searchable format. You can select a Data Processing Engine definition to transform the pieces of information across multiple objects and fields and populate the searchable object with the consolidated data. You can also map fields from

source objects to fields on the searchable object to create picklists and hyperlinks that improve the search experience.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Automotive Cloud, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, Nonprofit Cloud for Grantmaking, and Public Sector Solutions. View edition availability. [View edition availability](#).

USER PERMISSIONS NEEDED

To configure the searchable object: Use Criteria-Based Search and Filter system permission

 **Note** For Criteria-Based Search and Filter (CBSF), only a limited number of standard objects are available as searchable objects, depending on the licenses available in the org. To know which standard objects are supported for CBSF in your cloud, such as Automotive, Health, or Manufacturing cloud, see the specific cloud's documentation.

Define Basic Details

You can use a searchable object configuration for multiple search criteria configuration records.

1. From Setup, in the Quick Find box, enter *Criteria*, and then select **Criteria-Based Search and Filter**.
2. On the Searchable Object Configuration tab, click **New**.
3. Enter a name for the configuration.
The API Name field is automatically populated.
4. For Searchable Object, search for and select a standard or custom object.
The object should have all the fields from other objects that you want to use as search criteria, result display columns, and aggregation criteria.
5. Enter a description.
6. For Data Synchronization Job, search for and select an active Data Processing Engine definition.
If you're using a different mechanism to sync data in the searchable object, leave this field blank.
7. Click **Save**.

Set Up Criteria Field Mappings

Create Criteria Field Mappings to map picklist-type fields on source objects to text-type fields on the searchable object. The text-type field inherits the default picklist values on a source object. Users can simply select a picklist value as a search criteria rather than typing in the exact value.

If you're mapping custom picklists, first create the corresponding text-type fields on the searchable object.

1. On the Searchable Object Configuration tab, click a record.

2. In the Criteria Field Mapping section, click .
3. Select one or more source objects.
4. For all Searchable Object Field rows that show fields that don't require picklists, select **Do not map** in the Source Object column.
5. For each row that shows fields that require picklists, select a source object.
The options that you see depend on the source objects that you selected.
6. Select the source object field that you want to use for mapping.
7. Click **Save**.
The mappings are applied to all searchable criteria configurations that use the same searchable object configuration.

Set Up Filter Field Display Formats

Select alternative display formats for filter fields. For example, display a text field as a picklist so users can simply select a picklist value in that filter field rather than typing in the exact value.

1. On the Searchable Object Configuration tab, click a record.
2. In the Filter Field Display Format section, click .
3. For each Searchable Object Field row that requires an alternative display format, select the display type to use in filter criteria.
4. Click **Save**.
The display types are applied to all search criteria configurations that use the same searchable object configuration.

Set Up Result Field Mappings for Search Result Lists

Create Result Field Mappings to convert text-type fields on the searchable object into lookup-type fields. The record names in the search result list are then converted from plain text to hyperlinks. Users can click the hyperlink for a record name in the search results list view to navigate to the relevant record pages.

1. On the Searchable Object Configuration tab, click a record.
2. In the Result Field Mapping section, click .
3. For each row that shows search result fields that aren't lookups, select **Do not map** in the Source Object column.
4. For all Searchable Object Field rows that show lookup fields that are used in search results, select the searchable object as the source object.
5. For Source Object Field, select the lookup-type field to use for mapping.
Only ID fields from a searchable object are available as options.
6. Click **Save**.
The mappings are applied to all searchable criteria configurations that use the same searchable object configuration.

Set Up Filter Field Parsing

Select text area filter fields with pipe-separated values to parse. Criteria-Based Search and Filter performs special processing so that users can group and aggregate or filter search results by these fields.

1. On the Searchable Object Configuration tab, click a record.
2. In the Result Field Mapping section, click .
3. Move text area fields to parse from the Available Fields list to the Selected Fields list.
4. Click Save.

The parsing is applied to all search criteria configurations that use the same searchable object configuration.

Set Up Search Actions in Criteria-Based Search and Filter

Define the actions that users can take on search results. Create actions and set up prebuilt actions for your search configurations. Users can select multiple search results and apply an action from the Criteria-Based Search and Filter component.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Automotive Cloud, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, Nonprofit Cloud for Grantmaking, and Public Sector Solutions. View edition availability. [View edition availability](#).

To add search actions to search configurations, see [Configure the Search Criteria for a Searchable Object](#).

[Create a Search Action](#)

Configure flows, Lightning web components, or Omniscripts as actions.

[Set Up the Copy Records and Create Report Search Actions](#)

Give users the ability to save and share search result details. Internal users and Experience Cloud users can copy data directly from search results. Internal users can also create a report directly from search results.

Create a Search Action

Configure flows, Lightning web components, or Omniscripts as actions.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Automotive Cloud, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, Nonprofit Cloud for Grantmaking, and Public Sector Solutions. View edition availability. [View edition availability](#).

USER PERMISSIONS NEEDED

To create a search action:

Use Criteria-Based Search and Filter system permission

AND

View Setup and Configuration

If you're setting up a flow-based action, make sure that the flow has the *selectedSearchResultRecordIds* variable to collect the IDs passed by the search. It must be a collection variable with the data type text and be available outside the flow for input.

If you want to create custom search result actions, create a flow-based action.

-  **Note** Admins can use only the predefined Lightning Web Component-based actions to create search result actions.

Use a user-friendly name for the flow or Lightning web component action. For example, if you create an action to send emails to customers, name it Send Email.

1. From Setup, in the Quick Find box, enter *Criteria*, and then select **Criteria-Based Search and Filter**.
2. On the Action Configuration tab, click **New**.
3. Enter a name for the action button that the user clicks on the search results page.
4. Select the type of action.
 - FlowDefinition
 - LightningWebComponent
 - OmniScript
5. Select the action instance that corresponds to your action type.
6. Save your changes.

Set Up the Copy Records and Create Report Search Actions

Give users the ability to save and share search result details. Internal users and Experience Cloud users can copy data directly from search results. Internal users can also create a report directly from search results.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Automotive Cloud, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, Nonprofit Cloud for Grantmaking, and Public Sector Solutions. View edition availability. [View edition availability](#).

USER PERMISSIONS NEEDED

To create a search action:

Use Criteria-Based Search and Filter system permission

AND

View Setup and Configuration

To open, edit, or create a flow in Flow Builder:

Manage Flow

Set Up the Copy Records Search Action

Create a search action that uses the Copy Records Lightning web component.

1. From Setup, in the Quick Find box, enter *Criteria*, and then select **Criteria-Based Search and Filter**.
2. On the Action Configuration tab, create a search action.
 - a. Click **New**.
 - b. Enter a descriptive name for the action button.
 - c. For the action type, select **LightningWebComponent**.
 - d. For the action reference, select **Copy Records**.
3. Save your changes.

Now you can add the new search action to search configurations.

Set Up the Create Report Search Action

Customize the Create Report flow to use a report template that meets your business needs. Then create a search action that uses your custom flow.

1. In Flow Builder, save the Create Report flow as a new flow.
2. In the ContentDocumentTitle element, for Value, replace `EmptyString` with the title of a content document to use as a template for the report.
3. Save your changes and activate the new version of the flow.
4. From Setup, in the Quick Find box, enter *Criteria*, and then select **Criteria-Based Search and Filter**.
5. On the Action Configuration tab, create a search action.
 - a. Click **New**.
 - b. Enter a descriptive name for the action button.
 - c. For the action type, select **FlowDefinition**.
 - d. For the action reference, select your new flow.
6. Save your changes.

Now you can add the new search action to search configurations.

See Also

[Configure the Search Criteria for a Searchable Object](#)

[Flow Builder Tour](#)

Configure the Search Criteria for a Searchable Object

Help your users quickly search for records based on multiple criteria and decide how they view the results and what actions they can take.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Automotive Cloud, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, Nonprofit Cloud for Grantmaking, and Public Sector Solutions. View edition availability. [View edition availability](#).

USER PERMISSIONS NEEDED

To create a search criteria configuration:

Use Criteria-Based Search and Filter system permission

AND

View Setup and Configuration

To configure a card view:

OmniStudio Admin permission set

1. From Setup, in the Quick Find box, enter *Criteria*, and then select **Criteria-Based Search and Filter**.
2. On the Search Configuration tab, click **New**.
3. Create the configuration.
 - a. Enter a name for the configuration.
The API Name field is automatically populated.
 - b. For Searchable Object, search for and select the object that you want to use as the basis of the search.
 - c. For Searchable Object Configuration, search for and select an active configuration record.
You can update this field later.
 - d. Enter a description for the configuration.
 - e. Click **Next**.
4. Select the search criteria.
 - a. Move up to 20 fields from the Available Fields list to the Selected Fields list.
Select fields that represent widely known attributes about the data that users most likely want to find. For example, if users want to find high-priority customers, select the Priority field.
 - b. Use the up and down arrows to arrange the order in which the selected fields are displayed to the user.
 - c. Click **Next**.
5. Select the search result display format, either Card or List. The preview shows the difference between search results displayed as cards or in a list. Then click **Next**.
6. For a Card display format, select an Omnistudio Flexcard to use to display search results as cards. Then click **Next**.
7. For a List display format, select the search result columns.

- a. Move up to 20 fields from the Available Fields list to the Selected Fields list.
Select fields that represent information about the data that users most likely want to further analyze. For example, if users want to find high-priority customers, select the Customer Name field.
 - b. Use the up and down arrows to arrange the order in which the selected fields are displayed to the user.
 - c. Click **Next**.
8. Define the distance criteria, or click **Skip this step** if you don't want to include distance parameters.
- a. For Unit of Measure, select **Kilometers**, or **Miles**.
 - b. For Value, enter the higher limit for a distance range.
For example, for a distance range of 1-20 miles, enter *20*.
 - c. Click **Add**.
 - d. Add up to six values for distance range so that the scope of the search can be incrementally extended.
For example, if you add the values 20, 25, and 30, the search can be expanded or restricted to a radius of 20 kilometers, 25 kilometers, or 30 kilometers.
 - e. For Relative Location, select a location-type of field to calculate the distance from.
 - f. To show search results in an interactive map, turn on **Show Map**.
To find the most suitable resource based on location, users can use a map that appears alongside search results.
 - g. Click **Next**.
9. For a map display, select the field values to show for the map marker titles and descriptions.
10. Select the filter criteria for search results.
- a. Select a filter criteria type, either Grouping and Aggregation Fields or Filter Fields.
 - b. Move up to 20 fields from the Available Fields list to the Selected Fields list.
For Grouping and Aggregation, select fields that can have a wide range of values in case the user wants to segment the results based on these values. For example, if users want to find high-priority customers, select the Country field.
 - c. Use the up and down arrows to arrange the order in which the selected fields are displayed to the user.
 - d. Click **Next**.
11. Select the sorting criteria for search results.
- a. Move up to 20 fields from the Available Fields list to the Selected Fields list.
The top most field in your Selected Fields list determines the sort order when the initial results are displayed and when a user modifies the search filters but doesn't select a sort option. The list is in ascending order only. When a user selects multiple sort options, the order in which you've selected the fields determines the order of the results (not the order the user selects). If you don't select any fields, users won't see any sort options.
 - b. Use the up and down arrows to arrange the order in which the selected fields are displayed to the user.
 - c. To include distance criteria in sorting for search results displayed as cards, enable **Sort by Distance**.
 - d. Click **Next**.
12. Select the actions for the search results.
- a. Move up to 10 search actions from the Available Fields list to the Selected Fields list.
Criteria-Based Search and Filter includes these prebuilt actions. For details about configuring these prebuilt actions, see [Set Up the Copy Records and Create Report Search Actions](#).

Action	Description
Copy Records	<p>Copies data from selected search results.</p> <p>To use the Copy Records search action, configure a new search action to use the Copy Records LightningWebComponent.</p>
Create Report	<p>Creates a report using data from selected search results.</p> <p>To use the Create Report search action, customize the Create Report flow to use a report template that meets your business needs. Then configure a new search action to use your custom flow.</p>

For details about prebuilt actions designed for your product, see your product documentation.

- b. Use the up and down arrows to arrange the order in which the selected actions are displayed to the user.
- If you add multiple actions, you can see how the actions will be displayed to the user.
- c. Click **Done**.

13. To make the configuration available for selection when you add the Criteria-Based Search and Filter component to a page, click **Activate**.

See Also

[Automotive Cloud Help: Create a Search Action Configuration for Vehicle Inventory](#)
[Health Cloud Help: Configure Provider Search with Criteria-Based Search and Filter](#)

Add the Criteria-Based Search and Filter Component to a Page

Add the Criteria-Based Search and Filter component to any standard or custom Lightning page. Users can use the component to search for records by multiple criteria, view and aggregate the results, and then take actions on the results.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Automotive Cloud, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, Nonprofit Cloud for Grantmaking, and Public Sector Solutions. View edition availability. [View edition availability](#).

USER PERMISSIONS NEEDED

To add a component:

Customize Application

1. Open the page where you want to add the component.
2. Click **Setup**, and click **Edit Page**.

3. From the list of standard components, drag **Criteria-Based Search and Filter** onto the page canvas.
4. In the Properties pane, for Search Configurations, click **Select....**
5. Move active search criteria configurations from the Available list to the Selected list.
You can add up to five active search configurations to a page. Each configuration is displayed on a separate tab.
6. Click **OK**, and then save your changes and activate the page.
The search criteria fields and search result display fields that the user sees depend on the search criteria configuration. The search results are records in the searchable object.

Sync the data in the searchable object regularly using a flow or a similar mechanism so that users see the most current results.

Add the Criteria-Based Search and Filter Component to an Experience Cloud Site

Enrich the search experience for customers and business partners. Give authenticated and guest users the ability to search for records by multiple criteria, aggregate or filter the results, and then take actions on the results. Add style to your search page by applying a theme with fonts and colors that match your site design or brand.

REQUIRED EDITIONS

Available in: Lightning Experience

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USER PERMISSIONS NEEDED

To create an Experience Cloud site:

Create and Set Up Experiences

AND

View Setup and Configuration

To use Criteria-Based Search and Filter on Experience Cloud:

Criteria-Based Search and Filter for Experience Cloud permission set

To create or clone profiles:

Manage Profiles and Permission Sets

To create users:

Manage Internal Users

To create permission sets:

Manage Profiles and Permission Sets

To assign a permission set:

Assign Permission Sets

USER PERMISSIONS NEEDED

AND

View Setup and Configuration

To assign a permission set license: Manage Users

To create sharing rules: Manage Sharing

Add the Search Component to a Page

1. In a new or existing Experience Cloud site, create a standard page for searching, add it as a menu item, and make the page publicly available.
2. From the list of standard components, drag **Criteria-Based Search and Filter** onto the page canvas.
3. Select active search configurations for the site.
 - a. Select the Criteria-Based Search and Filter component.
 - b. In the Properties pane, for Search Configurations, click **Select....**
 - c. Move active search criteria configurations from the Available list to the Selected list and then click **OK**.You can add up to 5 active search configurations to a page. The site displays each configuration on a separate tab.
4. To change the look and feel of the search experience, choose or customize a theme.

Give Authenticated Users Access to Your Search

1. Clone the Customer Community Plus User profile.
2. Create a user record for authenticated users who log in to an Experience Cloud site. For Profile, select the cloned Customer Community Plus User profile.
3. Assign the Criteria-Based Search and Filter for Experience Cloud permission set to the user record.
For guidance about the object and field level access typically required in search configurations for your product, see your product documentation.
4. In the administration workspace for the Experience Cloud site, in Members settings, select the cloned Customer Community Plus User profile.

Give Guest Users Access to Your Search

1. Create a custom permission set that gives read access to the searchable object.
For guidance about the object and field level access typically required in search configurations for your product, see your product documentation.
2. If your site displays search results as cards, create a custom permission set that gives read access to OmniStudio objects. See [Grant Digital Experience Guest Users Omnistudio Access](#).
3. Configure the guest user profile for your site. In Experience Builder, in General settings, under Guest User Profile, click the profile link. Click **View Users**, and then click the guest user profile. Assign your

custom permission sets and the Criteria-Based Search and Filter for Experience Cloud permission set to the guest user profile.

4. Create a sharing rule for the searchable object. Select the Rule Type **Guest user access, based on criteria**. For criteria, enter *Created by Starts with 005*. Then add criteria to filter publicly available records as needed. Without additional criteria, all the searchable object records are publicly available. Share with the guest user record. Set the Access Level to **Read Only**.

Review Member Settings and Publish Your Site

1. In the administration workspace for your site, in Members settings, make sure the correct profiles and permission sets are selected. In Emails settings, select or clear Send welcome email based on whether you want to send emails to new users after the site is activated.
2. Preview your site, and then publish it.
3. Activate the site.

See Also

[Experience Cloud](#)

[Securely Share Your Experience Cloud Sites with Guest Users](#)

[Create Permission Sets](#)

[Create Guest User Sharing Rules](#)

Use Criteria-Based Search and Filter

Get visibility into complex sets of data, such as inventory and aggregated customer information. Search for records using multiple criteria or any part of a word, filter the results, view results on a map, and take actions on the records that match your criteria. CBSF provides a more intuitive and reliable search experience with consistent data display and clear visibility into when data was last updated.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Automotive Cloud, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, Nonprofit Cloud for Grantmaking, and Public Sector Solutions. View edition availability. [View edition availability](#).

USER PERMISSIONS NEEDED

To use criteria-based search and filter:

Use Criteria-Based Search and Filter system permission

Your search experience is defined by your admin. To search and filter additional fields, see different field values, show a map, or take additional actions on search results, contact your admin.

Apply Criteria to Find Searchable Records

Use a combination of text, picklist, and location fields to search for records using the Criteria-Based Search and Filter component.

1. Open the page that has the Criteria-Based Search and Filter component.
2. In the Search Criteria section, specify values for the fields.
The fields available as criteria depend on the search criteria configuration set up by the admin. For picklist fields, the values available for selection depend on the criteria field mappings configured by the admin.
3. To limit the search within a specific geographic area, use the Relative Location and Maximum Distance Range fields, if they're available.
4. Click **Search**.
5. To start a new search, click **Clear Selection**.

Search Records Using Any Word

Search records using any part of a word, even non sequential terms, making it easier to locate inventory records, product batches, or parts even if your search input is incomplete or partial. Any Word Search is enabled by default in all orgs. You can disable this feature if needed using the Any Word Search option in the Criteria-Based Search and Filter setup.

1. Open the page that has the Criteria-Based Search and Filter component.
2. In the Search Criteria section, specify values for the fields. For example, enter 'compa' or 'com'.
The fields available as criteria depend on the search criteria configuration set up by the admin.
3. Click **Search**.

The search returns the records containing the search term such as 'Compactor'.



Note A minimum of three characters is required to perform a search.

Review and Filter the Results

To focus on search results that are most relevant, apply filters. Depending on your search criteria configuration, you can either group the records and then view the aggregated data for each group. Or you can filter results by values in one or more fields. In search results, you can click a record name to see the details.

1. Review the records in the Search Results section and click record hyperlinks to view details.
2. For Grouping and Aggregation Criteria, select a field to filter the results. Or enter values in one or more filter fields, and then click **Apply**.
3. To see more results, scroll down.

The top most field configured by your admin determines the sort order when the initial results are displayed and when you modify the search filters but you don't select a sort option. The list is in

ascending order only. When you select multiple sort options, the order in which the admin has selected the fields during configuration determines the order of the results (not the order you select). If the results aren't what you're expecting, contact your admin and ask if the searchable object is up to date.

Note

- Date-time fields appear in your local timezone using standard Salesforce formatting.
- Currency fields display symbols instead of currency codes.
- You can view the Last Refreshed Date for search results to see when the data was last updated. This timestamp is updated through the Data Processing Engine (DPE). So when configuring the searchable object, ensure to link the DPE that populates the searchable object to the Data Synchronization Job field.

Show Results in a Map

Visualize search results in an interactive map.

1. Above the records in the Search Results section, click **Show Map**.
2. Pan and zoom in or out to find the most suitable resource based on location. To view essential information about a search result on the map, click a map marker.
3. To switch back to a filter view, click **Hide Map**.

Take Actions on Records

After you filter records, select multiple records and take actions, such as flow or Lightning Web Component-based actions.

1. Select the checkboxes beside the search result records and select an action in the Search Results header.
The name of the action depends on how the admin has named the Search Action Configuration record.
2. After the action completes, you can select multiple results and take another action as required.