

## Lecture 1: Exploring lookup relationships

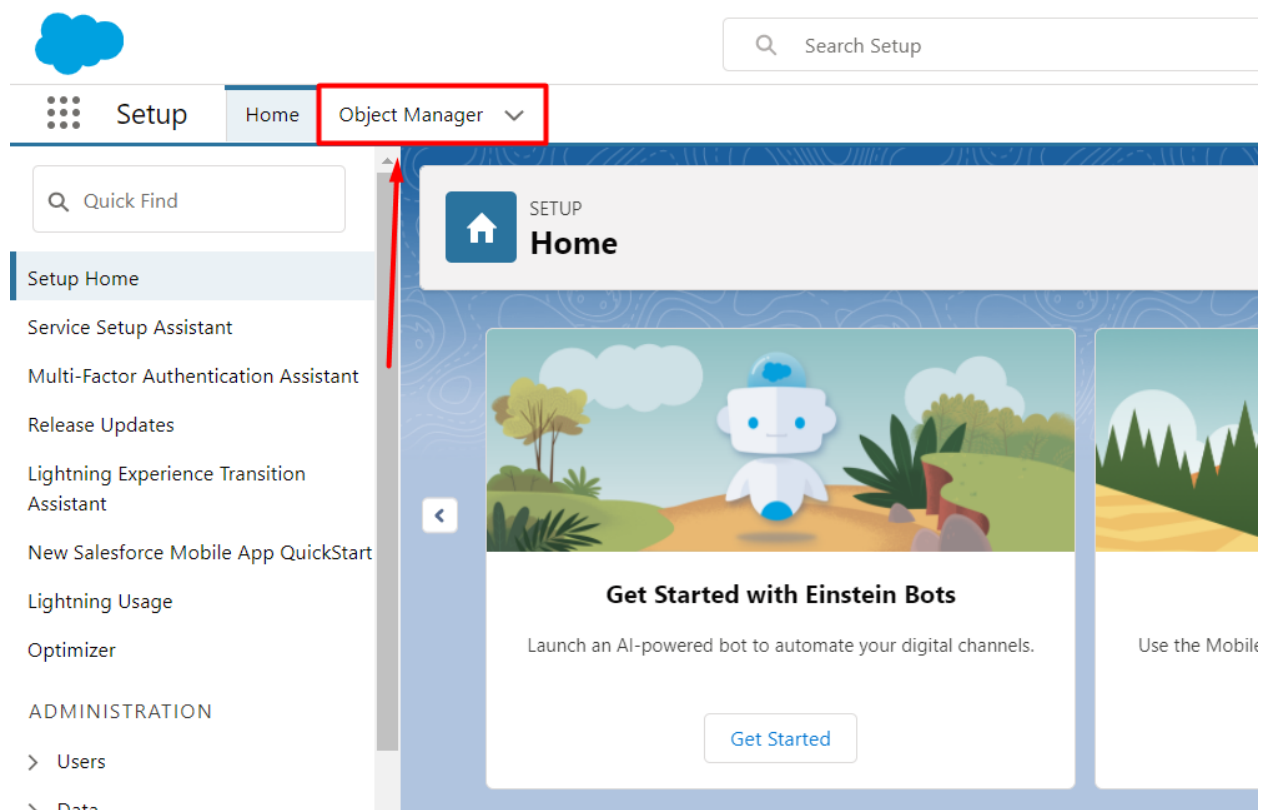
In this lecture we will understand what look up relationships are and explore more about this topic.

**Step 1:** Lookup relationships basically work with two objects one will be on the parent side and one will be on the child side.

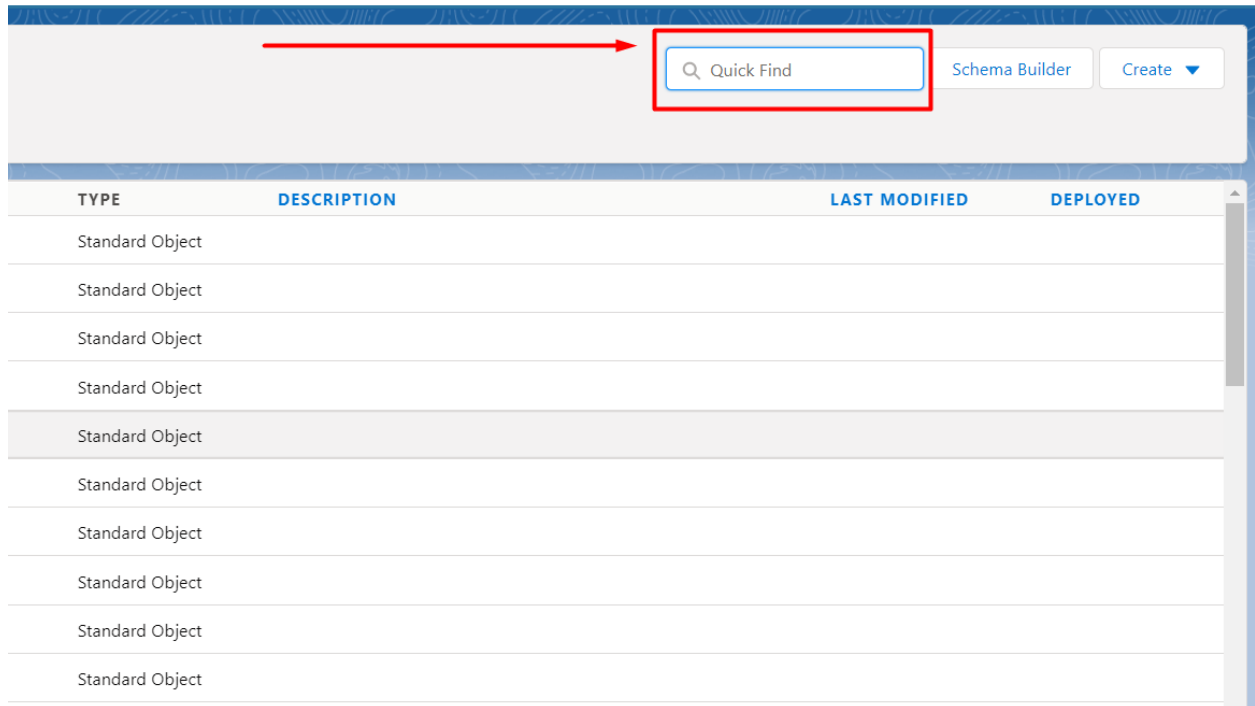
- What does lookup mean?

When a parent has many child records so basically if you want to implement more than one relationship or many relationships then you use lookup for it.

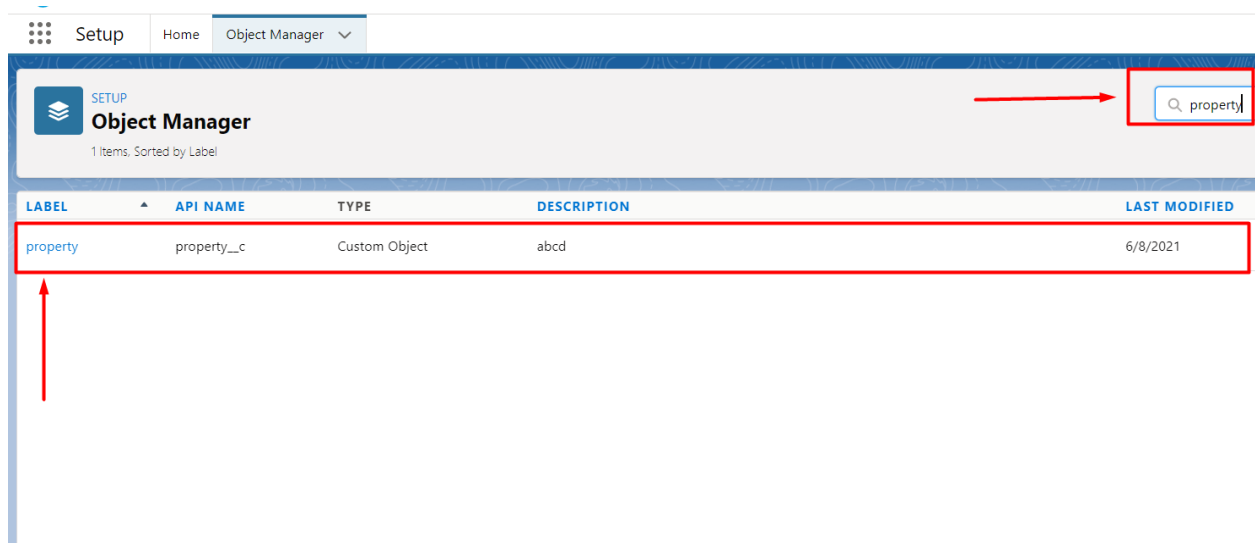
**Step 2:** For demonstration purposes in the following lecture we will be taking up two objects, one will be “**Account**” from the parent side and another one will be “**Property**” from the child side. Now if you want to create a lookup relationship field you will be required to open a child object (Property) in this case. Go to the object manager option available on your home page's navigation bar and click to open.



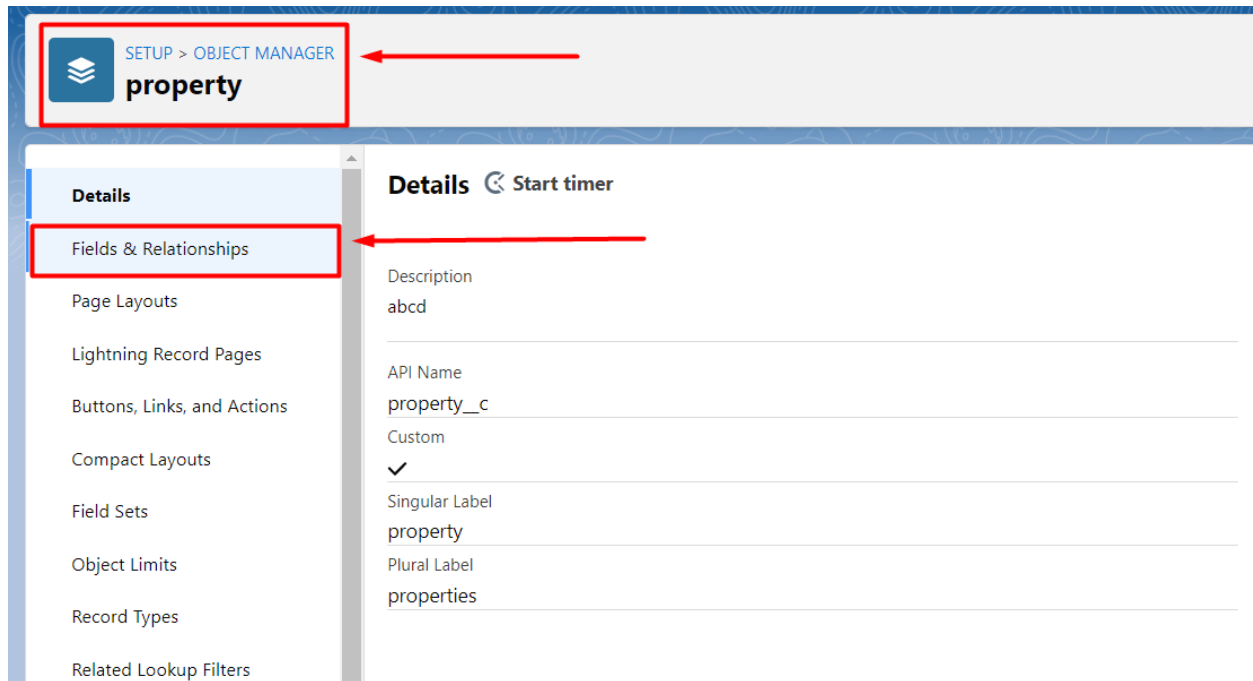
**Step 3:** As you open the object manager you will find a quick find option present on the right side of your page, go to the quick find option and type property which is our child record in this specific demonstration case.



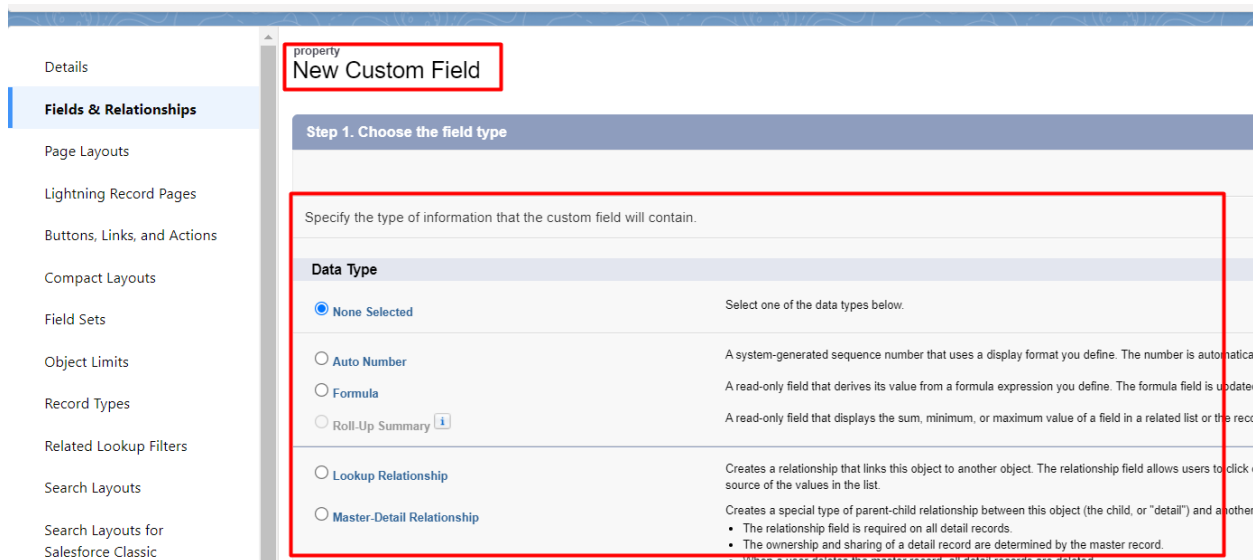
**Step 4:** As you type property, you will be directed to the next page where your searched object will appear. Click on the label to open.




**Step 5:** As you open the object on the left side of your screen you will be able to see an option for fields and relationships.



**Step 6:** Once you open a field and relationships you will have an option on the top right side of your page. Click to open as you open new you will be directed to the next page with the step one to create a field which will have several information to be filled and selected.



**Step 7:** Within the page you will be able to see the options given as lookup relationship and master detail relationship.

<input checked="" type="radio"/> None Selected	Select one of the data types below.
<input type="radio"/> Auto Number	A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
<input type="radio"/> 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.
<input type="radio"/> Roll-Up Summary 	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.
<input type="radio"/> 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.
<input type="radio"/> Master-Detail Relationship	Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where: <ul style="list-style-type: none"><li>• The relationship field is required on all detail records.</li><li>• The ownership and sharing of a detail record are determined by the master record.</li><li>• When a user deletes the master record, all detail records are deleted.</li><li>• You can create rollup summary fields on the master record to summarize the detail records.</li></ul> 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.
<input type="radio"/> External Lookup Relationship	Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

**Step 8:** As you focus on the text given on the right hand side in front of the option lookup it states that "it 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". For this lecture this object refers to **Property** and another object referred is **Account**.

Select one of the data types below.
A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
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.
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.
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: <ul style="list-style-type: none"><li>• The relationship field is required on all detail records.</li><li>• The ownership and sharing of a detail record are determined by the master record.</li><li>• When a user deletes the master record, all detail records are deleted.</li><li>• You can create rollup summary fields on the master record to summarize the detail records.</li></ul> 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.
Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
Allows users to select a True (checked) or False (unchecked) value.
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.
Allows users to enter a date or pick a date from a popup calendar.

**Step 9 :** In order to understand it better let's first create the lookup relationship field for that you have to click on the lookup relationship option and click on next.

property  
New Custom Field [Help for this Field](#)

**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 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.

☐ Master-Detail Relationship 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.

[Next](#)

**Step 10:** In the next step which is step two you will be asked to select the parent object with which this property object will be related to. So here we are choosing "account" and clicking on the option next.

**Step 2. Choose the related object**

Select the other object to which this object is related.

Related To:

[Previous](#) [Next](#)

**Step 11:** The third step will be to enter the labels and names for the lookup field. The label , name and child relationship name will be generated by default; you can also change it if you want. Moving on further you can also put help text and description if you want below you will notice an option given as “What to do if the lookup record is deleted?” which means if the parent record by which this child record is linked with is deleted, would you want to clear the value of the linked record or not. There are two options given you can select on the basis of your need. After filling up information you click on next.

property  
New Relationship

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

Field Label  ⓘ

Field Name  ⓘ

Description

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 ⓘ

**Step 12:** Next step is Establish field-level security for reference field so can enable as per your requirement and after enabling click on next.

**Step 4. Establish field-level security for reference field** Step

Previous **Next**

Field Label Account

Data Type Lookup

Field Name Account

Description

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	<input checked="" type="checkbox"/> Visible	<input type="checkbox"/> Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
bgbp	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**Step 13:** Next step is Add reference field to page layout so you have to enable the checkbox and click next.

property  
New Relationship Help for this Field

**Step 5. Add reference field to Page Layouts** Step 6

Previous **Next**

Field Label	Account
Data Type	Lookup
Field Name	Account
Description	

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

<input checked="" type="checkbox"/> Add Field	Page Layout Name
<input checked="" type="checkbox"/>	property Layout

Previous Next

**Step 14:** The final step is Add custom related lists. So whenever we create a lookup relationship a reference list is created that we need to add on the parent object page layout. So the related list label will be auto generated.

You can also change it and below that we have to choose on which page layout we have to place it. Our parent object “Account” has four page layouts you can check accordingly. We are here selecting all and then click on save.

**Step 6. Add custom related lists** Step 7

Previous Save & New **Save**

Field Label	Account
Data Type	Lookup
Field Name	Account
Description	

Specify the title that the related list will have in all of the layouts associated with the parent.

**Related List Label**

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

<input checked="" type="checkbox"/> Add Related List	Page Layout Name
<input checked="" type="checkbox"/>	Account (Marketing) Layout
<input checked="" type="checkbox"/>	Account (Sales) Layout
<input checked="" type="checkbox"/>	Account (Support) Layout
<input checked="" type="checkbox"/>	Account Layout
<input checked="" type="checkbox"/>	Append related list to users' existing personal customizations

**Step 15:** As you click on save you will be directed to the next page where you can see that on the property object we have created a lookup account.

**Fields & Relationships**

Quick Find

5 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE
Account	Account__c	Lookup(Account)
Created By	CreatedById	Lookup(User)
Last Modified By	LastModifiedById	Lookup(User)
Owner	OwnerId	Lookup(User,Group)
property Name	Name	Auto Number

**Step 16:** So now if you go to the quick find option and search for the property tab and click on the new option now we also have to select a particular account as well.

properties

Recently Viewed

0 items • Updated a few seconds ago

property Name

New pro

Information

property Name

Account

Search Accounts...

Cancel Save &



**Step 17:** As you fill the information and click save you will be directed to the next page where you will be able to see that the account is created.

The screenshot shows the 'Property Details' page for property 'P-0003'. The navigation bar at the top includes 'Sales', 'Home', 'Opportunities', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', and 'Campaigns'. A green notification banner at the top right states 'Property "P-0003" was created.' The 'Details' tab is active, showing fields for Property Number (P-0003), Property Name (Sea View), Price (\$100,000.00), Account (New Acc REST API 1), Created By (Sanjay Gupta), and Last Modified By (Sanjay Gupta). The 'Account' field is highlighted with a red rectangle. The 'Owner' field shows 'Sanjay Gupta'.

**Step 18:** As you click on the account record it will be opened and in the related list as you scroll down at the bottom you will see properties.

The screenshot shows the 'Account Details' page for 'New Acc REST API 1'. The navigation bar at the top includes 'Sales', 'Home', 'Opportunities', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', 'Campaigns', and 'Dashboard'. The 'Accounts' tab is active. The page shows sections for 'Notes & Attachments (0)', 'Partners (0)', 'Employees (0)', and 'Properties (1)'. The 'Properties (1)' section is highlighted with a red rectangle, indicating that there is one related property. The 'Properties (1)' section also has a 'New' button.

**Step 19:** Now if you go to property again and create a new record with the same process and click save this time in the related list you will see that there are two properties associated.

Account

New Acc REST API 1

Notes & Attachments (0)

ScanUpload Files

Upload Files

Or drop files

Partners (0)

New

Employees (0)

New

Properties (2)

New

Property Number

P-0003

P-0004