

How to create lookup relationship in salesforce

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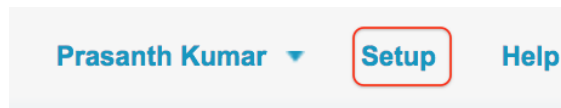
How to create lookup relationship in salesforce :- Lookup relationship in Salesforce is one type of Object Relationship in Salesforce. In our previous Salesforce Tutorial we have learned about [how to create master detail relationship in Salesforce](#). Lookup relationship is a one to many relationship created between two object and the bonding formed between the object is “**loose bonding**”.

What is Lookup Relationship in Salesforce.

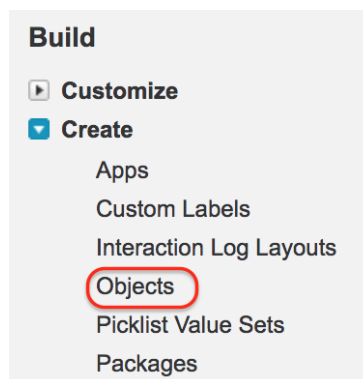
- **Lookup relationship** is a one type of relationship which form loose bond relationship between Parent object and Child object.
- In lookup Child record need not be associated to a parent.
- No Cascade record deletion happens.
- Lookup field is not required on the page layouts of the detail object.
- No **Rollup summary fields** can be created in Lookup relationship.

How to create lookup relationship in salesforce?

To create lookup relationship in salesforce user must navigate to **Setup | Build | Create | Object | Child Object (Samples)**.



Now go to **Build | Create | Objects**.



- Now select your **Child object (Sample)**.

Action	Label
Edit Del	Fr
Edit Del	Hospital
Edit Del	Invoice
Edit Del	Pharma Product
Edit Del	Pharma Product Invoice
Edit Del	Sales Team
Edit Del	Sample
Edit Del	Visit
Edit Del	www.tutorialkart.com

- Now go to Custom Fields and relationship.



- Now click on **New Button** as shown above.

Sample Help for this Page ?

New Custom Field

Step 1. Choose the field type

New
Field Dependencies

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

Data Type

Select one of the data types below.

- None Selected**
- 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.

Select **Lookup Relationship** as shown above and click on **Next button**.

Step 2: -Selecting **Related to Object**.

Sample
New Relationship

Help for this Page ?

Step 2. Choose the related object

Step 2

Previous Next Cancel

Select the other object to which this object is related.

Related To Visit

Previous Next Cancel

Now select Child object in step 2. Here we selected visit as child object Sample object.

Sample
New Relationship

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

Field Label Visit

Field Name visit

Description

Help Text

Child Relationship Name Samples

Enter Field label, Field Name and click on Next button.

Step 4 :- Establishing Field Level Security for reference field.

Sample
New Relationship

Help for this Page ?

Step 4. Establish field-level security for reference field

Step 4 of 6

Previous Next Cancel

Field Label Visit

Data Type Lookup

Field Name visit

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	Visible	Read-Only
	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Make sure the Field level Security is visible for all profiles. Now click on Save button.

Step 5 :- Select the **Page layout** for child object field.

Sample Help for this Page ?

New Relationship

Step 5. Add reference field to Page LayoutsStep 5 of 6

Previous Next Cancel

Field Label Visit
Data Type Lookup
Field Name visit
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"/>	Sample Layout

Previous Next Cancel

- Click on **Next** button.

Step 6 :- Adding custom related lists.

Sample Help for this Page ?

New Relationship

Step 6. Add custom related listsStep 6 of 6

Previous Save & New Save Cancel

Field Label Visit
Data Type Lookup
Field Name visit
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"/>	Visit Layout

Append related list to users' existing personal customizations

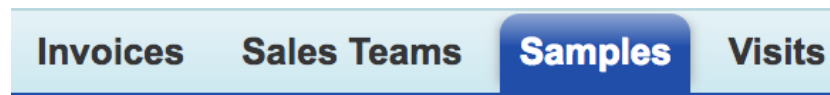
Click on **Save** button as shown above. Now successfully we have created **lookup relationship in salesforce.**

Custom Fields & Relationships						
Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By
Edit Del	Pharma Product	Pharma_Product__c	Master-Detail(Pharma Product)	<input checked="" type="checkbox"/>		Prasanth Kumar , 1/29/2017 10:11 PM
Edit Del	Quantity	Quantity__c	Number(18, 0)			Prasanth Kumar , 1/2/2017 7:41 AM
Edit Del	Visit	visit__c	Lookup(Visit)	<input checked="" type="checkbox"/>		Prasanth Kumar , 2/2/2017 4:01 AM

Now open Sample object detail page and we find create lookup relationship between Sample object and Visit object is created in salesforce.

Testing lookup relationship in salesforce.

- Go to **Sample Object** as show below and create a **new Sample record**.



Recent Samples

[New](#)

Sample code

[Samp-001](#)

[Samp-000](#)

As shown below In Sample record we have Visit field and the visit field is not mandatory. If we create a record with ut entering visit (lookup field) the record will be saved because lookup relationship forms loose bonding. But in [Master detail relationship](#) we can not create a record without entering master detail field because master detail relationship forms tight bonding.

Visit **FR Visit01** Customize Page | Edit Layout | Printable View | Help for this Page ?

[← Back to List: Custom Object Definitions](#)

Samples [1]

Visit Detail Edit Delete Clone

Visit Name	FR Visit01		
FR Name	doctor1		
Hospital	Mallechwari Hospital		
Fr	Ashok		
Created By	Prasanth Kumar, 1/2/2017 7:31 PM	Last Modified By	Prasanth Kumar, 1/2/2017 8:42 PM

Edit Delete Clone

Samples New Sample Samples Help ?

Action	Sample code
Edit Del	Samp-003

Conclusion

In this [Salesforce tutorial](#) we have learned about How to create lookup relationship in salesforce. In our upcoming Salesforce Tutorial we learn about [How to create Many to Many relationship in Salesforce.](#)

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