

How to Create Master Detail relationship in Salesforce

Creating Master Detail relationship in Salesforce

Master Detail relationship is a one type of relationship which form tight bond [relationship](#) between Parent object and Child object. Here we call Master Object as Parent and Child object as Detail object. Child records should always associated to a parent they can not remain orphan. Cascade record deletions happens means when a parent object record is deleted all it's child records get deleted automatically. Standard Objects can not be a detail object(Child object).

Example:- Account(Standard Object) can not be detail object.

The master-detail relationship fields is required on the page layouts of the detail object. [Roll-up Summary fields](#) can be created on Master object(Parent Object.) Child record inherits all security and sharing settings from it's parent record.

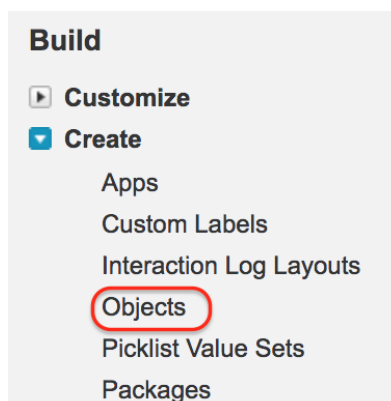
Master Detail relationship in Salesforce Error.

When creating Master Detail relationship in Salesforce, an error will be displayed like “You cannot create a new Master-Detail relationship on an existing custom object if records already exist. You must first create a [Lookup relationship](#), populate the lookup field with data in all records, and then change the relationship type to Master-Detail”. This is because a Master detail relationship does not allow for orphaned child records. Once if we have a lookup relationship with each child having a parent, then change the field type to master detail relationship in child object.

How to create Master Detail relationship in Salesforce.

Creating **Master Detail relationship** in Salesforce is very easy. Now we are going crate 1:m relationship between Pharma product and Samples. Here Pharma Product is Parent object and Samples is Child Object. Follow the steps given below.

- **Go to Setup | Build | Create | Objects.**



When we click on Object a list of custom objects will be displayed. Click on the child object to which you want to create Master-Detail relationship. As shown below

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 navigate to Sample object and click on it. Now a object definition page will be displayed. Now go to Custom fields and Relationships.

Custom Fields & Relationships New Field Dependencies

Now click on New button to create new relationship.

Step1:- Choose the filed type.

In Step 1 we have to choose the field type. Select Master-detail relationship as show below.

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.

Click on Next between and choose the related object in Step 2.

Step 2 :- Choose the related object.

Step 2. Choose the related object

Select the other object to which this object is related.

Related To |

We have to select parent object as related object. Choose Pharma Object as related to as shown above. Now click on Next button.

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

Field Label ⓘ

Field Name ⓘ

Description

Help Text

Child Relationship Name ⓘ

Sharing Setting

Read Only: Allows users with at least Read access to the Master record to create records.

Read/Write: Allows users with at least Read/Write access to the Master record to create and edit Detail records.

Allow reparenting Child records can be reparented to other parent records after they are created

Click on Next button.

Sample [Help for this Page](#) ⓘ

New Relationship

Step 4. Establish field-level security for reference field Step 4 of 6

Field Label Pharma Product

Data Type Master-Detail

Field Name Pharma_Product

Description

Click on Next button.

Sample [Help for this Page](#) ⓘ

New Relationship

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

Field Label Pharma Product

Data Type Master-Detail

Field Name Pharma_Product

Description

These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.

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

Click on Next button.

Sample Help for this Page ?

New Relationship

Step 6 of 6

[Previous](#) [Save & New](#) [Save](#) [Cancel](#)

Field Label: Pharma Product
Data Type: Master-Detail
Field Name: Pharma_Product
Description:

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

These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.

Add Related List	Page Layout Name
<input checked="" type="checkbox"/>	Pharma Product Layout

Append related list to users' existing personal customizations

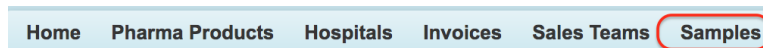
[Previous](#) [Save & New](#) [Save](#) [Cancel](#)

Now creating Master-Detail relationship between **Pharma Product** and **Sample** is successful. Finally click on Save button to save all Settings.

Custom Fields & Relationships [New](#) [Field Dependencies](#) [Custom Fields & Relationships Help ?](#)

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	Product code	Product_code__c	Number(18, 0)	<input type="checkbox"/>		Prasanth Kumar, 1/2/2017 7:40 AM
Edit Del	Quantity	Quantity__c	Number(18, 0)	<input type="checkbox"/>		Prasanth Kumar, 1/2/2017 7:41 AM
Edit Del	Visit	Visit__c	Lookup(Visit)	<input checked="" type="checkbox"/>		Prasanth Kumar, 1/2/2017 7:32 PM

To check relationship between two object go to Child object(Samples). Click on Sample and create new record as shown below.



As there are no records in Sample click on New to create new record in Samples.

Samples **Home**

View: [All](#) [Go!](#) [Edit](#) | [Create New View](#)

Recent Samples [New](#)


Enter the Quantity field.

Sample Edit
New Sample

Sample Edit

Information

Quantity

Pharma Product 

And this is the relationship between Samples and Pharma Product. The relationship must always be on the child object. Here Sample is the child object and the relationship is master-detail relationship. Now we have to associate one Pharma product to Sample as shown above. Now click on Save button.

Sample
Samp-000
[« Back to List: Custom Object Definitions](#)

Sample Detail

Sample code	Samp-000
Quantity	30
Pharma Product	Vitamin D
Created By	Prasanth Kumar, 1/29/2017 10:20 PM

Now that we have successfully created record in Samples. Create two more records in samples.

- Now click on Parent object(Pharma Object).



- Go to vitamin D.

Recent Pharma Products

Pharma Product Name

[Vitamin D](#)

Now we see new related list are created. Before creating the relationship this related list are not presented here. After creating relationship only there is one to many relationship between Pharma product and Samples.

The screenshot shows the Salesforce interface for a 'Pharma Product' named 'Vitamin D'. The 'Pharma Product Detail' section includes fields for Product name, product type (low level), product specs, Price (\$599), Stock remaining, Manufacturer, and Business Type. It also shows creation and modification details by Prasanth Kumar on 1/29/2017. Below this, there are two related lists: 'Pharma Product Invoices' (with a 'New Pharma Product Invoice' button and 'No records to display') and 'Samples' (with a 'New Sample' button and a table of two sample records). The 'Samples' table has columns for 'Action' and 'Sample code', with rows for 'Samp-000' and 'Samp-001', each with 'Edit' and 'Del' links. A red box highlights the 'Pharma Product Name' field and the 'Samples' table.

Here the Pharma product (Vitamin D) is associated to two Sample records. This relation we call Master-Detail relationship. In Parent – Child relationship, the child record must be associated with parent. We can create Child Object records with out Parent object record. The Parent object record is mandatory in creating Child object record in Salesforce.

Conclusion

In this [Salesforce tutorial](#) we clearly understood about Creating Master-Detail relationship in Salesforce. In our next salesforce tutorial we are going to create about [How to create Lookup relationship in Salesforce.](#)

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