



CREATING LOOKUP FILTERS ON RELATIONSHIP FIELDS

Summary

Lookup filters are administrator settings on lookup, master-detail, and hierarchical relationship fields that restrict the valid values and lookup dialog results for the field. The restrictions for the field are based on criteria such as a field on the lookup object or the user's profile.

Lookup filters are administrator settings that restrict the valid values and lookup dialog results for lookup, master-detail, and hierarchical relationship fields. Administrators specify the restrictions by configuring filter criteria that compare fields and values on:

- The current record (source)
- The lookup object (target)
- The user's record, permissions, and role
- Records directly related to the target object


Administrators can make lookup filters required or optional.

- For fields with required lookup filters, only values that match the lookup filter criteria appear in the lookup dialog. Also, users can't save invalid values manually typed in the field when editing the record. If a user tries to save an invalid value, Salesforce displays an error message, which administrators can customize.
- For fields with optional lookup filters, only values that match the lookup filter criteria appear in the lookup dialog initially; however, users can click the **Show all results** link in the lookup dialog to remove the filter and view all search result values for the lookup field. Also, optional lookup filters allow users to save values that don't match the lookup filter criteria, and Salesforce does not display an error message if a user tries to save such values.

About Dependent Lookups

A *dependent lookup* is a relationship field with a lookup filter that references fields on the source object. For example, you can configure the case `Contact` field to only show contacts associated with the account selected in the case `Account Name` field.


When a user changes the value of a referenced field on the source object, Salesforce immediately verifies that the value in the dependent lookup still meets the lookup filter criteria. If the value doesn't meet the criteria, an error message is displayed and users can't save the record until the value is valid.

 **Tip:** Dependent lookups are supported in Visualforce pages.

Defining Lookup Filters

1. You can create lookup filters for new relationship fields in step 3 of the custom field wizard.
 - a. From the management settings for the field's object, go to Fields.
 - b. Click **Edit** next to the name of the lookup or master-detail relationship field to which you want to apply the filter.
2. In the Lookup Filter Options section, click **Show Filter Settings**.
3. Specify the filter criteria a record must meet to be a valid value. To specify criteria, click **Insert Suggested Criteria** and choose from a list of suggested criteria, or manually enter your own criteria. To enter your own criteria:

Creating Lookup Filters on Relationship Fields

- a. In the first column, click the lookup icon or start typing in the text box and select a field.
 - b. In the second column, select an operator.
 - c. In the third column, select `Value` if Salesforce should compare the field in the first column with a static value, or select `Field` if Salesforce should compare the field in the first column with the value of another field.
 - d. In the fourth column, enter the value or select the field that Salesforce should compare with the field in the first column.
-  **Note:**
- Click **Add Filter Logic** to add Boolean conditions.
 - Select a suggested field from the Field text box. You can only select fields on the current record, the lookup object, or the user record. You can also choose related fields that are one relationship away from the lookup object. Salesforce assists you by listing the available fields and relationships when you click the lookup icon or click inside the text box.
 - Lookup filter criteria can compare fields of different types as long as they are compatible.
4. Specify whether the filter is required or optional. For fields with optional lookup filters, only values that match the lookup filter criteria appear in the lookup dialog initially; however, users can click the **Show all results** link in the lookup dialog to remove the filter and view all search result values for the lookup field. Also, optional lookup filters allow users to save values that don't match the lookup filter criteria, and Salesforce does not display an error message if a user tries to save such values.
For required lookup filters, specify whether you want Salesforce to display the standard error message or a custom message when a user enters an invalid value.
 5. Optionally, enter text to display in the lookup search dialog. Consider text that guides users in their searches and explains the business rule that the lookup filter implements.
 6. Leave `Enable this filter` selected.
 7. Save your changes.