CROSS Object Formula

When the formula is referring the field from related fields of parent object, then that custom formula is called **Custom Formula Field**.

Parent object can belong to any of relationships either **lookup** or **master-detail**.

Scenario:
There are two objects as below
Department__c (Parent)

Department No ↑	Department Name	Status
DPT-001	Sales	Active
DPT-002	Support	Active
DPT-003	Information Technology	Obselete

Employee__c (Child Object)

First Name ↑	Last Name	Department No
Ramya	Krishnan	DPT-001
David	John	DPT-002
Laskhman	Kumar	DPT-002
Ram	Krishnan	DPT-001
Sekar	Babu	DPT-001
Usha	Emilie	DPT-002

Now requirement is to display the department name of parent object Department__c into every employee record.

Solution:
Create a custom formula field in employee object as below
Step 1: Choose the field type – Formula
Step 2: Give the label and field Name, and then choose the return type as text
Step 3: Click on Insert Field button and Then click on "Department No >" (relationship field) to see all the fields from the parent (department) object.

Step 4: Click insert to include the formula as below
  Department_No__r.Department_Name__c

Step 5: Assign to profile
Step 6: Add to page layout
Step 7: Save the field.

View any employee record. Now the department name from parent object is displayed in child record employee here as follows

Employee Detail

EmployeeAutoNo	EMP-0007
First Name	Ramya
Last Name	Krishnan
Grade	Executive
Grade Level	
Department No	DPT-001
Department Name	Sales

1. **How many levels back the parent field is referred?**
   You can reference fields from objects that are up to 10 relationships away.

2. **Where to use the cross object formula?**
   A cross-object formula is available anywhere formulas are used except when creating default values.

3. **Cross Object formula by passes the security restriction**
   Using cross object formula, a user can see the field of parent object in child even though the user does not have access to that parent object record.

Create below formula Fields

Child Object Name	Field Label	Purpose	Parent Object Name and Field
Employee__c	Department Name	To display the department name in employee record	Department__c and Department_Name__c
Employee__c	Dept Status	To display the department status in employee record	Department__c and Status__c
Trainee__c	Project Name	To display the project name in trainee record	Project__c and Project_Name__c
Contact	Company Type	To display the industry field value of account in contact record	Account and Industry
Opportunity	Customer Website	To display the website	Account and Website