# Ranjith Krishnan SESSION 10

## **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)

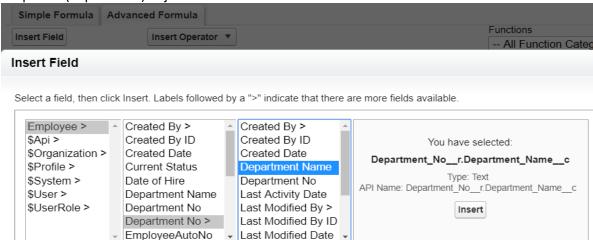
First Name ↑	Last Name	Department No
Ramya	Krishnan	DPT-001
David	John	<u>DPT-002</u>
Laskhman	Kumar	<u>DPT-002</u>
Ram	Krishnan	<u>DPT-001</u>
Sekar	Babu	DPT-001
Usha	Emilie	<u>DPT-002</u>

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.



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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
Employeec	Department Name	To display the department name in employee record	Departmentc and Department_Namec
Employeec	Dept Status	To display the department status in employee record	Departmentc and Statusc
Traineec	Project Name	To display the project name in trainee record	Projectc and Project_Namec
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

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