

Unlock Powerful Filtering with UnofficialSF's Quick Lookup Component

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November 26, 2024 - The **Quick Lookup Component from UnofficialSF** is a game-changing enhancement over the standard Salesforce Flow Lookup component, offering added flexibility and control to streamline your data selection process. Ideal for managing parent-child relationships and filtering data by specific criteria, this component is crafted to improve user interactions within your Flows.

What is the Quick Lookup Component?

The Quick Lookup Component builds upon the standard Salesforce Lookup component, giving you more advanced options for filtering and displaying records. With this component, you can filter lookup results using Flow variables, SOQL "where" clauses, and even set up dependent lookups that dynamically adjust based on user selections.

With the Version 1.2.0 release, several enhancements have been introduced, including the ability to output the displayed value for use later in the Flow. These improvements provide users with a smooth and intuitive experience, making Flows more flexible and responsive.

Key features of the Quick Lookup Component

Enhanced filtering options:

- **Filter lookups based on input:** Apply a dynamic SOQL "where" clause to filter the displayed options. For example, to show only accounts classified as "Vendor" or "Partner," simply use the SOQL clause: "Type = 'Vendor' OR Type = 'Partner'".
- **Parent-child lookups:** A Flow can be configured so that users first select an account and then choose a contact associated with that account. The contact lookup is automatically filtered based on the selected account.
- **Default value display:** If there is a specific value that should prepopulate in the lookup (such as "ACME Company" in the case of accounts), it can be set up as a default placeholder. The user can still search other records or confirm the default selection.

Multiple parent/child groupings:

- This component supports multiple parent/child groupings on the same screen. By assigning unique Component IDs to each parent lookup, complex filtering scenarios can be set up across various components.

Customizable outputs:

- This component allows configuration of which field to display in the lookup (e.g., Name) and which value to output (e.g., Id). This flexibility enables the use of the most relevant data in the Flow. For instance, it may display the account name to the user but pass the account Id to create an Opportunity record

Setting up Quick Lookup in your Flow

Below is a straightforward guide to configuring the Quick Lookup Component:

1. **Object Name:** Specify the object you want to look up, such as "Account" or a custom object.
2. **Display Field:** Select the field to display in the lookup (e.g., "Name").
3. **Output Field:** Choose the field value to pass to your Flow, such as "Id" for use in subsequent actions.
4. **Where Clause:** Add a custom SOQL clause to further filter lookup results.
5. **Parent-Child Linking:** Assign unique Component IDs to enable parent-child relationships, allowing the child component to filter based on the parent selection.

Enhance your Salesforce Flows with the Quick Lookup Component

The Quick Lookup Component is a powerful tool for [Salesforce](#) administrators and developers, designed to enhance user Flows by simplifying data filtering and managing parent-child relationships. With advanced filtering options and customizable outputs, this component delivers a dynamic and efficient lookup experience.

Contact Citrin Cooperman's [Digital Services Practice](#) today and take the first step toward improved Lookup functionality and streamlined user interactions with data in Salesforce Flows.

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