

Link Records in Salesforce with Lookup Relationship Fields

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Linking Multiple Records in Salesforce

Salesforce uses "lookup relationship fields" to create linked records within your Salesforce instance. After you have created, updated, or looked up multiple objects in your Salesforce connector, you can link them by mapping these lookup relationship fields to the "ID of an object above" in your connector.

This can be useful when you are wanting to create linked records, or to send values to lookup relationship fields in Salesforce.

Note: Only IDs can be sent to Salesforce lookup relationship fields, no other values will function properly.

Steps to Link Records

Start by creating, updating, or looking up the objects that you want to work with. You should always start with parent objects at the top of the connector, and then follow those with child objects. When setting up your objects and mappings, you can also map any fields that are not Salesforce lookup relationship fields.

▼ 1 - Create new Account record
✓ Ok ▼

Create ▼
Account ▼

Tip: Missing an object? [Try refreshing the list.](#)

Skip this step if...

FIELD MAPPING

Select the Salesforce fields that will receive data from your form.

THESE SALESFORCE FIELDS:	GET THEIR VALUE FROM:
Account Name <i>(required)</i>	Last Name

▼ 2 - Create new Contact record
✓ Ok ▼

Create ▼
Contact ▼

Tip: Missing an object? [Try refreshing the list.](#)

Skip this step if...

FIELD MAPPING

Select the Salesforce fields that will receive data from your form.

THESE SALESFORCE FIELDS:	GET THEIR VALUE FROM:
Last Name <i>(required)</i>	Last Name

Account ID ▼

→

a field in your form ▼

→

Select a form field ▼

✕

✓

For the relationship lookup field in Salesforce, select its value as **“the id of an object above”**. In this example, the Contact record's Account ID will be mapped to the Account object above. This way, the Contact record that we create will be linked to the Account record that was created above.

FIELD MAPPING

Select the Salesforce fields that will receive data from your form.

THESE SALESFORCE FIELDS:	GET THEIR VALUE FROM:
Last Name <i>(required)</i>	Last Name

Account ID ▼

→

the ID of an object above ▼

→

1. Account ▼

✕

✓

Once you have finished mapping your fields, click **Save** at the bottom of your connector. When responses are submitted, each object will now be linked together in Salesforce.
