

Using the "Like" Operator in the Salesforce Connector

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Using the Like Operator

If you would like to use the "Like" operator in your Salesforce Connector to find similar or closely matched records to what a user has submitted in a form, you can do so. However, if the LIKE operator is not functioning as needed for your particular use case (i.e. it's not finding the records you want it to) you might need to make a slight configuration change

In general, the "Like" operator should be used with the "Formula or Text" field and that formula should be equal to a field alias from your form. Additionally, you will need to add an extra percent sign around your field alias in order for the LIKE operator to function more like a wildcard lookup:

The screenshot shows the configuration interface for a Salesforce Connector. At the top, there is a dropdown menu set to 'Lookup' and another set to 'Contact'. A tip reads: 'Tip: Missing an object? Try refreshing the list.' Below this is a checkbox labeled 'Skip this step if...'. The main configuration area is titled 'LOOKUP #1' and contains the text 'Find a Contact record using:'. On the right of this text is an 'OK' button. Below this, there is a dropdown menu set to 'a formula or text:'. To the left of this dropdown is a dropdown menu set to 'First Name'. To the right of the 'First Name' dropdown is a dropdown menu set to 'Like'. Below these is a text input field containing the formula '%%tfa_1%%'. To the right of the input field is a trash icon. Below the input field is the text 'Enter a formula, or just text if you want to match a specific value.' At the bottom left, there is a button labeled 'Add another condition'. At the bottom right, there is a tip: 'Tip: Missing a field? Try refreshing the list.'

Provided you have used 3 percent signs surrounding your alias (as shown in the image above), the Like operator will find any value that contains the value entered in the form response.

For example, if tfa_1 is your first name field (as shown in the image above), and you had a first name stored in Salesforce as "Michael", a form response of "Mich" would match with "Michael".

However, a form response of "Michaels" would not match, because it has additional characters that are not stored in Salesforce.

In addition to the %%%tfa_1%%% format, you can also use the %!tfa_1%! format in order to accomplish the same functionality.

Note: When using the Like operator, if you are running into issues where blank form fields are causing records to update, we recommend [using a skip-if formula](#) to skip your connector step if certain fields are left blank.

Referencing a Query Parameter with the Like Operator

If you are using the [Salesforce Prefill Connector](#) , then you will need to define a [query parameter](#) . If you are wanting to reference that query parameter using the Like operator, there are several additional considerations to keep in mind.

Using the Like operator in a situation like this can be beneficial because you can still use wildcard lookups (as discussed above) in order to broaden the search in your lookup:

STEP 2 OF 2 - CONNECTOR INSTRUCTIONS

Select the type of *Salesforce object* you need to retrieve. (You can choose additional objects after this one).

Account

LOOKUP #1

Use this query to lookup a *Account* record:

Account Number an unsafe query paramete

Enter the name of the query string parameter.

Caution, make sure to select a field that cannot be guessed. A respondent could easily change the parameter value to try to access a different record.

In general, the query parameter you define in the Prefill Connector must only use letters, and cannot use any numbers or special characters. Because of this, you cannot add % signs around the query parameter, like you can when referencing field aliases as discussed above.

Therefore, in order to reference a query parameter using the Like operator, your prefilling link will need to use URL encoding to add percent into the prefilling link.

For example, if you had a setup similar to the image above where you were looking up the "Account Number" field with the query parameter "acctnum" you could set your prefilling link up like this:

tfaforms.net/FORM_ID?acctnum=%25%%tfa_1%%%25

This would be used in the case of triggering the prefill connector through a [redirect link](#), where the tfa_1 field in the initial form would be equal to the account number you wanted to use for the lookup.

