

# Cascading Fields

Last Modified on 13/03/2019 2:08 pm AEDT

The ability to filter one field from another field is called cascading fields.

Cascading fields can be configured between:

- Two choice fields
- A single choice field and a multi choice field
- Two lookup fields
- A lookup and a relationship field

## Cascade between choice fields

The example below describes how to filter between Category and Sub-category choice fields.

1. Open the form of where you want to configure the cascading choice fields
2. Create and add values to both Category and Sub-category choice fields
3. Select **Save**
4. Navigate to **Application toolbox**
5. Expand the **Choice Fields** menu from left hand navigation
6. Select the application in the drop down of where Category and Sub-category choice fields were created in
7. Select the child choice field, in this case Sub-Category and **Create** a new form
8. Add the **Name** field to the form
9. Select + in left navigation area of the Form Builder
10. Drag and drop **Choice Field** field onto the form
11. In the **Choice Field Properties** dialog select **Use Existing**
12. Find and select the parent choice field, in this case Category
13. Name your choice field with the same name as the existing one
14. Select **OK**
15. **Save** the form
16. Navigate to **Administration – Resources – Choice fields**
17. Find and select the child choice field, in this case Sub-Category
18. Select choice field value
19. Edit the choice field and select the appropriate parent value
20. Repeat steps 18 and 19 until all parent-child values have been assigned
21. Navigate back to the **Form** from step 1

22. Modify the **Choice Field Properties** of the child choice field, in this case Sub-Category
23. Expand **Options** and from the **Form Detail** tab, select the **Filter By** picker
24. **Add Filter** and select the parent choice field in **Filter by field** and **Relationship**
25. Select **OK**
26. **Save** the form

## Cascade between lookups/relationships

The example below describes how to filter between Campus and Buildings lookups.

1. To filter the child lookup based on the value of the parent, firstly, ensure that you have a parent-child relationship between two objects. In our campus and building example, campus is the parent and building child, where the campus object must contain a relationship to building.
  2. Secondly, ensure you have records against Campus which also include Building relationship records
  3. Now open the form of where you want to configure the cascading lookups
  4. Modify the **Lookup Properties** of the child lookup, in this case Building
  5. Expand **Options** and from the **Form Detail** tab select **Filter By** picker
  6. **Add Filter** and select the parent choice field in **Filter by field** and **Relationship**
  7. Select **OK**
  8. **Save** the form
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