

Buying Groups

Technical Reference Document

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This document provides a complete technical reference for the Buying Groups managed package. It covers all custom objects, fields, Apex classes, triggers, permission sets and default configuration values. Namespace prefix: THRINF.

Package Information

Item	Value
Package Name	Buying Groups
Namespace	THRINF
Package Type	2nd Generation Managed Package (2GP)
API Version	66.0
Package Id	0HogL0000002EuvSAE
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Section 1 - Custom Objects

1.1 Buying_Group__c

The primary object representing a buying committee. Created automatically by the matching engine or manually by users.

Field Label	API Name	Type	Default	Description
Name	Name	Text(80)	-	Auto-generated from matched company name
Status	THRINF__Status__c	Picklist	Active	Active or Inactive. Set by BuyingGroupStatusService.
System Deactivated	THRINF__System_Deactivated__c	Checkbox	False	True when system deactivated due to empty members. Prevents reactivation unless system triggered.
Matching Tier	THRINF__Matching_Tier__c	Picklist	Manual	Automatic = created by matching engine. Manual = created or assigned by user.
Primary Account	THRINF__Primary_Account__c	Lookup(Account)	-	The primary Account in this Buying Group. Set automatically based on Buying_Group_Role__c.
Total Engagement Score	THRINF__Total_Engagement_Score__c	Number(18,0)	0	Sum of Campaign_Responses__c across all Buying Group Members.
Accounts	THRINF__Accounts__c	Number(18,0)	0	Count of Accounts assigned to this Buying Group.
Open Opportunities	THRINF__Open_Opportunities__c	Number(18,0)	0	Count of open Opportunities linked to this Buying Group.

1.2 Buying_Group_Member__c

Junction object linking a Buying Group to an Account, Lead or Contact. Created and deleted automatically by the system.

Field Label	API Name	Type	Description
Buying Group	THRINF__Buying_Group__c	Master-Detail(Buying_Group__c)	The parent Buying Group
Contact	THRINF__Contact__c	Lookup(Contact)	The Contact member (if Object Type = Contact)
Lead	THRINF__Lead__c	Lookup(Lead)	The Lead member (if Object Type = Lead)
Object Type	THRINF__Object_Type__c	Picklist	Contact or Lead - indicates which member type this record represents
Email	THRINF__Email__c	Email	Email address of the member at time of BGM creation
Email Domain Type	THRINF__Email_Domain_Type__c	Picklist	Corporate, Public or Unknown - determined by comparing email domain to company name
Campaign Responses	THRINF__Campaign_Responses__c	Number(18,0)	Number of Salesforce Campaign responses within the Engagement Score Days rolling window

1.3 Buying_Group_Settings__c

Custom setting object. Only one record is allowed (enforced by BuyingGroupSettingsTrigger). Record must always be named 'Default Settings'.

Field Label	API Name	Type	Default	Description
Automation Tier	THRINF__Automation_Tier__c	Picklist	Automatic	Automatic, Suggested or Manual

Enable Exact Name Matching	THRINF__Enable_Exact_Name_Matching__c	Checkbox	True	Enables exact name matching
Enable Stripped Exact Name Matching	THRINF__Enable_Name_Stripped_Exact_Matching__c	Checkbox	True	Enables stripped name matching
Enable Hierarchy Matching	THRINF__Enable_Hierarchy_Matching__c	Checkbox	True	Enables account hierarchy matching
Enable Fuzzy Name Matching	THRINF__Enable_Fuzzy_Name_Matching__c	Checkbox	True	Enables fuzzy name matching
Enable Email Domain Matching	THRINF__Enable_Email_Domain_Matching__c	Checkbox	True	Enables email domain matching for Leads
Fuzzy Match Threshold	THRINF__Fuzzy_Match_Threshold__c	Number(5,2)	90	Jaro-Winkler similarity threshold (0-100)
Remove Empty Buying Groups	THRINF__Remove_Empty_Buying_Groups__c	Checkbox	False	Delete BGs when all members are removed
Max Records Per Run	THRINF__Max_Records_Per_Run__c	Number(4,0)	500	Maximum records per batch run. Max value 1000.
Engagement Score Days	THRINF__Engagement_Score_Days__c	Number(4,0)	90	Rolling window in days for engagement score calculation
Name Prefix Strip List	THRINF__Name_Prefix_Strip_List__c	Text(255)	the, a, an	Comma-separated list of prefixes to strip before name matching
Name Suffix Strip List	THRINF__Name_Suffix_Strip_List__c	Text Area	ltd, limited, inc...	Comma-separated list of suffixes to strip before name matching
Public Domain Blocklist	THRINF__Public_Domain_Blocklist__c	Text Area	gmail.com, yahoo.com ...	Comma-separated email domains excluded from email domain matching

1.4 Buying_Group_Batch_Log__c

Log record created after each batch run. Records results of matching and reset operations.

Field Label	API Name	Type	Description
Run Date	THRINF__Run_Date__c	DateTime	Date and time the batch was run
Status	THRINF__Status__c	Picklist	Success or Failed
Accounts Processed	THRINF__Accounts_Processed__c	Number(18,0)	Number of Account records processed in this run
Leads Processed	THRINF__Leads_Processed__c	Number(18,0)	Number of Lead records processed in this run
Buying Groups Created	THRINF__Buying_Groups_Created__c	Number(18,0)	Number of new Buying Groups created in this run
Buying Groups Updated	THRINF__Buying_Groups_Updated__c	Number(18,0)	Number of existing Buying Groups updated in this run
Error Message	THRINF__Error_Message__c	Text Area	Error details if Status = Failed

Section 2 - Custom Fields on Standard Objects

The following custom fields are added to standard Salesforce objects. These fields are not added to page layouts automatically - administrators must add them manually.

2.1 Account

Field Label	API Name	Type	Description
Buying Group	THRINF__Buying_Group__c	Lookup(Buying_Group__c)	The Buying Group this Account belongs to
Buying Group Role	THRINF__Buying_Group_Role__c	Picklist	Primary, Secondary, Subsidiary or Partner. Primary accounts are tracked on the BG Primary_Account__c field.
Match Type	THRINF__Match_Type__c	Picklist	How this Account was matched. Values: Original - Automatic, Original - Manual, Exact Name, Stripped Exact Name, Hierarchy, Fuzzy Name, Manual
Buying Group Ultimate Parent Id	THRINF__Buying_Group_Ultimate_Parent_Id__c	Text(18)	Stores the ultimate parent Account Id for hierarchy matching

2.2 Lead

Field Label	API Name	Type	Description
Buying Group	THRINF__Buying_Group__c	Lookup(Buying_Group__c)	The Buying Group this Lead belongs to
Match Type	THRINF__Match_Type__c	Picklist	How this Lead was matched. Values: Original - Automatic, Original - Manual, Exact Name, Stripped Exact Name, Email Domain, Fuzzy Name, Manual

2.3 Contact

Field Label	API Name	Type	Description
Buying Group	THRINF__Buying_Group__c	Lookup(Buying_Group__c)	The Buying Group this Contact belongs to. Set automatically based on the Contact's Account Buying Group.

2.4 Opportunity

Field Label	API Name	Type	Description
Buying Group	THRINF__Buying_Group__c	Lookup(Buying_Group__c)	The Buying Group this Opportunity belongs to. Set automatically based on the Opportunity's Account Buying Group.

Section 3 - Apex Classes

3.1 Production Classes

Class Name	Purpose	Key Methods
BuyingGroupMatchingService	Core account matching engine. Runs Exact, Stripped, Hierarchy and Fuzzy matching against existing Buying Groups.	matchAccounts(List, Settings)
BuyingGroupLeadMatchingService	Lead-specific matching engine. Runs Exact, Stripped, Email Domain and Fuzzy matching for Leads.	matchLeads(List, Settings)
BuyingGroupAccountHandler	Account trigger handler. Manages BG assignment, BGM creation, contact sync, opportunity sync, primary account management and Matching Tier.	handle(), handleDelete(), checkDuplicatePrimary()
BuyingGroupLeadHandler	Lead trigger handler. Manages BG assignment, BGM creation, engagement scores, lead conversion and reset bypass. Contains static bypassTrigger flag.	handle(), handleDeleteBefore(), handleDeleteAfter()
BuyingGroupContactHandler	Contact trigger handler. Manages BGM creation/deletion, engagement score recalculation on delete and account BG change.	handle(), handleDeleteBefore(), handleDeleteAfter(), handleAccountBGChange()
BuyingGroupStatusService	Evaluates BG status after member changes. Deactivates or deletes empty BGs based on Remove_Empty_Buying_Groups__c setting.	evaluateStatus(Set)
BuyingGroupOpportunityRollupService	Rolls up opportunity counts and values to Buying Groups.	rollupOpportunities(Set)
BuyingGroupBatchController	Aura controller for the batch run and reset UI components. Returns namespace dynamically for URL construction.	runBatch(), resetBatch(), getNamespace()
BuyingGroupSettingsService	Retrieves and caches the Default Settings record. Returns defaults if no settings exist.	getSettings()
BuyingGroupCampaignMemberHandler	CampaignMember trigger handler. Increments or decrements Campaign_Responses__c on BGM in real time when campaign responses change.	handle(), handleDelete()
BuyingGroupCampaignMemberController	Aura controller for the campaign activity component on the BG record page. Returns campaign member data including member name links and created dates.	getCampaignMembers(Id)
BuyingGroupInitialSweepBatch	Main matching batch. Processes all unmatched Accounts and Leads and assigns them to Buying Groups.	start(), execute(), finish()
BuyingGroupResetBatch	Multi-phase reset batch. Phases: MEMBERS, ACCOUNTS, LEADS, CONTACTS, OPPORTUNITIES, BUYING_GROUPS, BATCH_LOGS. Uses bypassTrigger pattern for LEADS phase.	start(), execute(), finish()
BuyingGroupEngagementScoreBatch	Recalculates Campaign_Responses__c on all BGs using the Engagement_Score_Days__c rolling window. Implements Schedulable - fires automatically when Engagement Score Days setting changes.	start(), execute(), finish(), execute(SchedulableContext)
BuyingGroupsPostInstall	Post-install script. Creates the Default Settings record on fresh install. Safe for upgrades - only creates if no record exists.	onInstall(InstallContext)

3.2 Test Classes (all passing, overall coverage 94%)

Test Class	Production Class Tested	Coverage
BuyingGroupMatchingServiceTest	BuyingGroupMatchingService	91%
BuyingGroupLeadMatchingServiceTest	BuyingGroupLeadMatchingService	91%
BuyingGroupAccountHandlerTest	BuyingGroupAccountHandler	98%
BuyingGroupLeadHandlerTest	BuyingGroupLeadHandler	96%

BuyingGroupContactHandlerTest	BuyingGroupContactHandler	100%
BuyingGroupStatusServiceTest	BuyingGroupStatusService	100%
BuyingGroupOpportunityRollupServiceTest	BuyingGroupOpportunityRollupService	100%
BuyingGroupBatchControllerTest	BuyingGroupBatchController	87%
BuyingGroupSettingsServiceTest	BuyingGroupSettingsService	100%
BuyingGroupCampaignMemberHandlerTest	BuyingGroupCampaignMemberHandler	100%
BuyingGroupCampaignMemberControllerTest	BuyingGroupCampaignMemberController	97%
BuyingGroupInitialSweepBatchTest	BuyingGroupInitialSweepBatch	80%
BuyingGroupResetBatchTest	BuyingGroupResetBatch	92%
BuyingGroupEngagementScoreBatchTest	BuyingGroupEngagementScoreBatch	100%
BuyingGroupsPostInstallTest	BuyingGroupsPostInstall	100%
BuyingGroupTriggerTest	BuyingGroupTrigger	100%

Section 4 - Apex Triggers

Trigger Name	Object	Events	Handler Class	Purpose
BuyingGroupAccountTrigger	Account	before insert/update after insert/update/delete	BuyingGroupAccountHandler	Manages BG matching, BGM creation, primary account, opportunity sync and contact sync on account changes
BuyingGroupLeadTrigger	Lead	after insert/update before delete after delete	BuyingGroupLeadHandler	Manages BG matching, BGM creation, engagement scores and lead conversion handling
BuyingGroupContactTrigger	Contact	before update/delete after insert/update/delete	BuyingGroupContactHandler	Manages BGM creation/deletion and engagement score recalculation on contact changes
BuyingGroupOpportunityTrigger	Opportunity	after insert/update/delete	BuyingGroupOpportunityRollupService	Rolls up opportunity counts, values and New Logo status to Buying Groups when opportunities change
BuyingGroupCampaignMemberTrigger	CampaignMember	after insert/update/delete	BuyingGroupCampaignMemberHandler	Real-time engagement score updates when campaign responses change
BuyingGroupSettingsTrigger	Buying_Group_Settings__c	before insert/update after update	Inline logic	Prevents duplicate settings records, enforces record name, fires engagement score batch when Engagement Score Days changes
BuyingGroupTrigger	Buying_Group__c	before insert	Inline logic	Sets Matching_Tier__c = Manual on insert if null. Does not overwrite values set by matching engine.

Section 5 - Permission Set

5.1 Buying Groups User

API Name: THRINF__Buying_Groups_User

Description: Grants access to all Buying Groups app objects, fields, tabs and Apex classes. Assign to all non-administrator users who need access to the Buying Groups app.

Note: System Administrators have access to all objects by default and do not need this permission set assigned.

Permission Type	Object/Resource	Access Level
Object	Buying_Group__c	Read, Create, Edit, Delete, View All, Modify All
Object	Buying_Group_Member__c	Read, Create, Edit, Delete, View All, Modify All
Object	Buying_Group_Settings__c	Read, Create, Edit, Delete, View All, Modify All
Object	Buying_Group_Batch_Log__c	Read, Create, Edit, Delete, View All, Modify All
Field	Account: Buying_Group__c, Buying_Group_Role__c, Match_Type__c	Read, Edit
Field	Lead: Buying_Group__c, Match_Type__c	Read, Edit
Field	Contact: Buying_Group__c	Read, Edit
Field	Opportunity: Buying_Group__c	Read, Edit
Tab	Buying_Group__c, Buying_Group_Settings__c, Buying_Group_Batch_Log__c	Default On
Apex Class	All THRINF Apex classes	Enabled

Section 6 - Aura Components

Component Name	Purpose	Used On
BuyingGroupRunBatch	Run Buying Group Matching button with confirmation dialog. Dynamically constructs batch log navigation URLs using namespace-aware getNamespace() method.	Buying_Group_Settings__c record page
BuyingGroupReset	Reset Buying Groups button with confirmation dialog and option to delete batch logs. Chains through all reset phases: Members, Accounts, Leads, Contacts, Opportunities, Buying Groups, Batch Logs.	Buying_Group_Settings__c record page
BuyingGroupSummary	Buying Group Coverage dashboard showing total Buying Groups, total Accounts and Leads, Accounts in Buying Groups, Accounts not in Buying Groups, Leads in Buying Groups and Leads not in Buying Groups. Includes a Refresh button. Calls getSummaryCounts() on BuyingGroupBatchController.	Buying_Group_Settings__c record page
BuyingGroupCampaignMembers	Campaign activity table showing all CampaignMember records for members of the Buying Group. Shows Member Name (link to BGM), Campaign Name, Status, Has Responded and Added to Campaign date.	Buying_Group__c record page

Section 7 - Key Technical Patterns

7.1 bypassTrigger Pattern

BuyingGroupLeadHandler contains a public static Boolean bypassTrigger = false flag. This is set to true by BuyingGroupResetBatch during the LEADS phase to prevent the trigger from re-setting Match_Type__c on Leads when Buying_Group__c is cleared during reset. Always reset to false after DML completes.

7.2 existingBGIds Pattern

After calling BuyingGroupStatusService.evaluateStatus(), the system re-queries Buying Groups to confirm they still exist before updating Total_Engagement_Score__c. This is required because evaluateStatus() can delete empty Buying Groups when Remove_Empty_Buying_Groups__c = true, causing ENTITY_IS_DELETED errors if the deleted BG is subsequently updated. Applied in BuyingGroupLeadHandler.handleLeadConversion(), handleDeleteAfter() and the leadsWithBGChange block.

7.3 Namespace-Aware Navigation

BuyingGroupRunBatch Aura component calls BuyingGroupBatchController.getNamespace() to dynamically retrieve the THRINF namespace prefix at runtime. This ensures correct URL construction for Batch Log list view navigation in both dev org (no prefix) and installed package (THRINF prefix) contexts.

7.4 Engagement Score Calculation

Engagement scores are maintained via two mechanisms:

- Real-time: BuyingGroupCampaignMemberHandler increments/decrements Campaign_Responses__c on BGM when CampaignMember records are inserted, updated or deleted. No date filter applied.
- Batch: BuyingGroupEngagementScoreBatch recalculates all Campaign_Responses__c values from scratch using the Engagement_Score_Days__c rolling window cutoff date. Corrects any real-time drift.

7.5 Matching Tier Logic

BuyingGroupTrigger sets Matching_Tier__c = Manual on before insert if the field is null. BuyingGroupAccountHandler additionally sets Matching_Tier__c = Manual on the Buying Group when an Account is manually assigned, but only if Matching_Tier__c is null or already Manual. Automatic values set by the matching engine are never overwritten.

7.6 Post-Install Script

BuyingGroupsPostInstall implements InstallHandler. On fresh install it creates a Default Settings record with recommended default values. On upgrade it checks for an existing Default Settings record and skips creation if one exists, preserving customer configuration.

Section 8 - Post-Install Default Settings Values

The following values are set by the post-install script on fresh installation:

Field	Default Value
Name	Default Settings
Automation_Tier__c	Automatic
Enable_Exact_Name_Matching__c	true
Enable_Name_Stripped_Exact_Matching__c	true
Enable_Fuzzy_Name_Matching__c	true
Enable_Email_Domain_Matching__c	true
Enable_Hierarchy_Matching__c	true
Fuzzy_Match_Threshold__c	90
Remove_Empty_Buying_Groups__c	true
Max_Records_Per_Run__c	500
Engagement_Score_Days__c	90
Name_Prefix_Strip_List__c	the, a, an
Name_Suffix_Strip_List__c	ltd,limited,inc,llc,plc,corp,corporation,co,company,group,holdings,international
Public_Domain_Blocklist__c	gmail.com,yahoo.com,hotmail.com,outlook.com