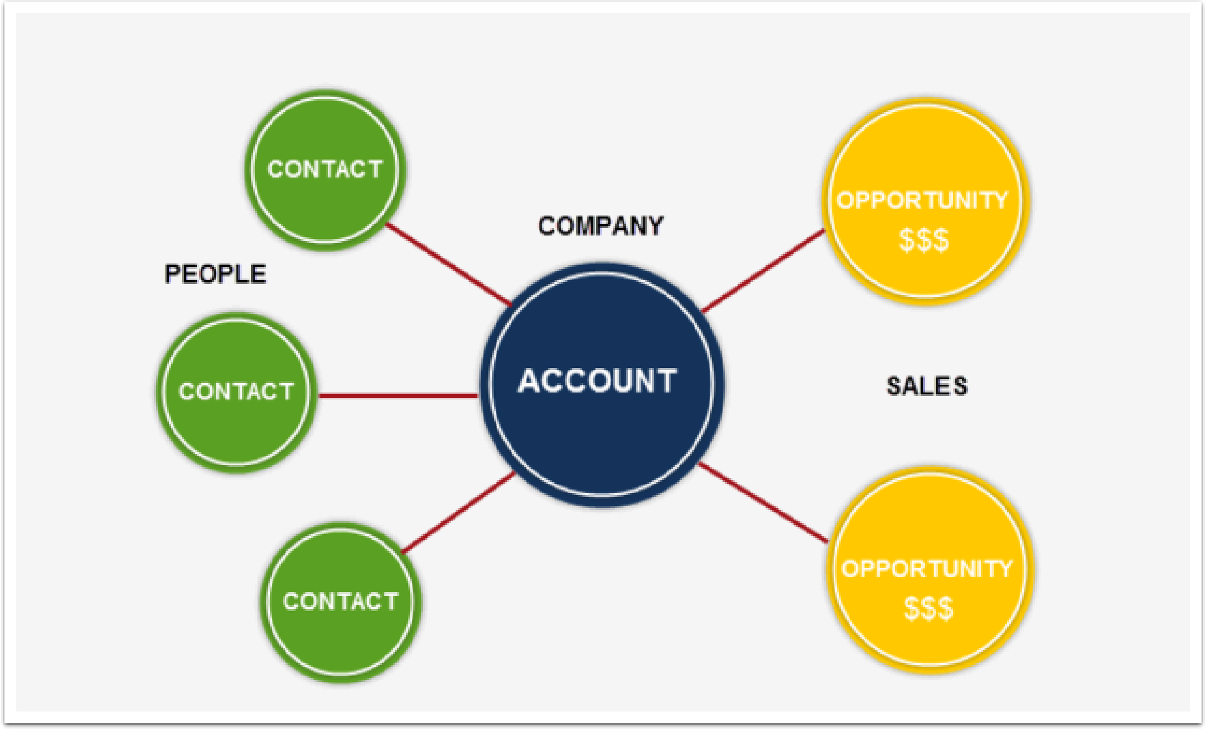
Salesforce Related Organizations Components.

Technical Manual for users



Version Control

Version #	Performed by	Date	Reason for changes
1.0	Erick Vega	07/07/2023	
1.1	Oscar Rojas	06/27/2024	
1.2	Edgardo Escobar	12/30/2025	Mass Operations Feature

Objective:

The objective of this user manual is to provide comprehensive guidance on utilizing the "Related Accounts" component in Salesforce effectively. This manual aims to equip users with the knowledge and skills required to link and manage related accounts within Salesforce, enabling them to streamline their sales processes and maximize customer relationship management (CRM) capabilities. Through clear instructions and practical examples, this manual will empower users to navigate, configure, and leverage the "Related Accounts" component to enhance their sales activities, improve data organization, and foster stronger customer connection

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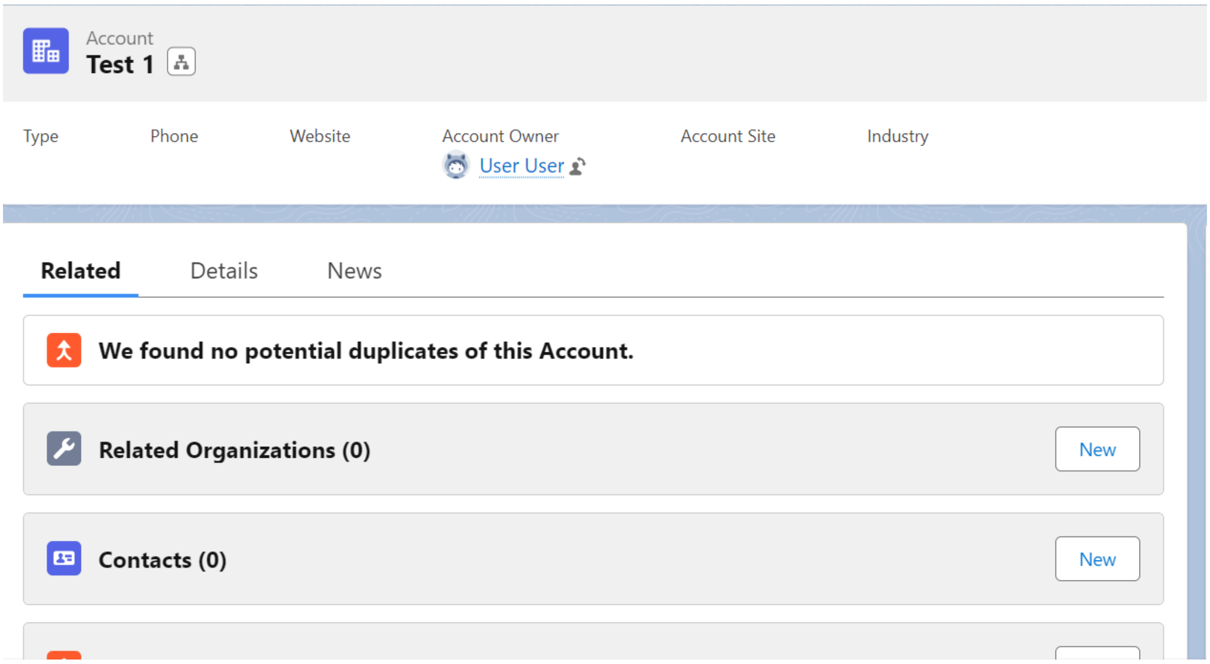
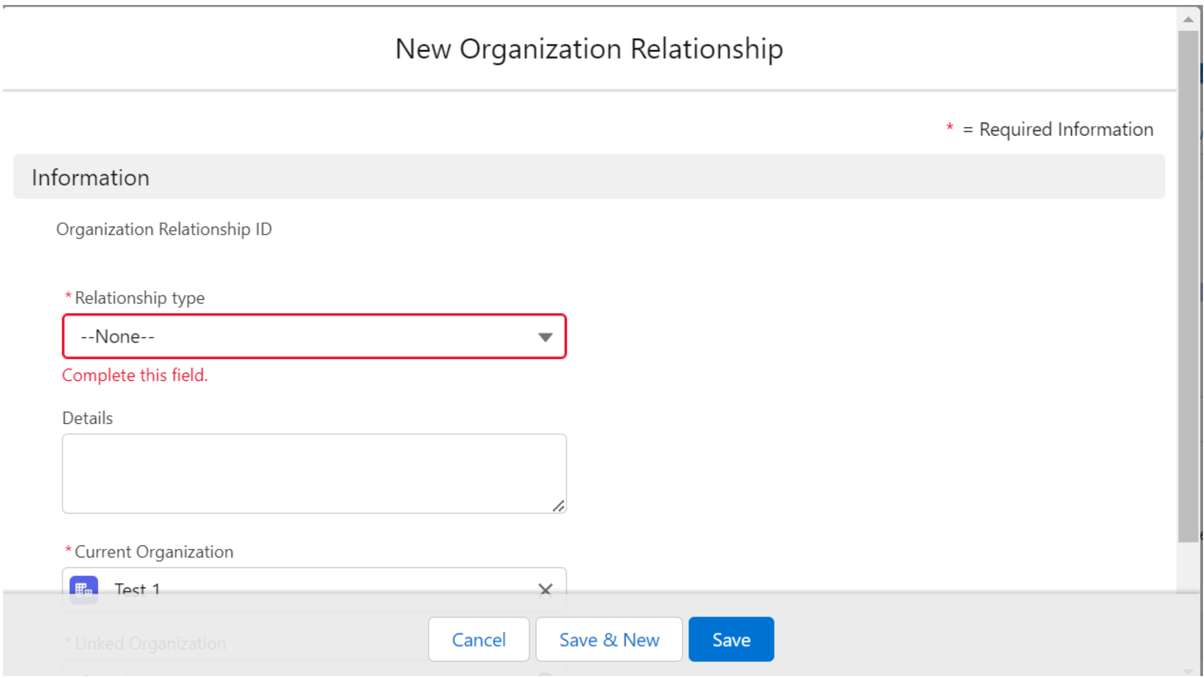
1. Create a Relation with another account

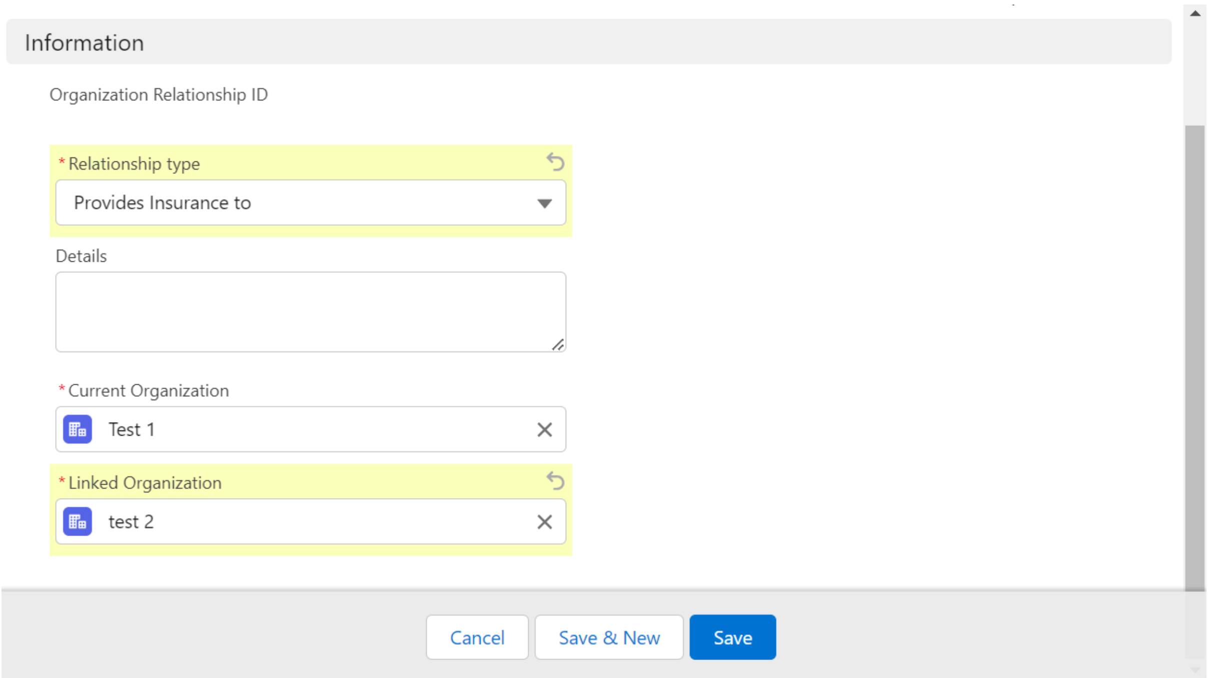
1.1 Go to accounts, click on the account you want to create the relation from and then and click on related.



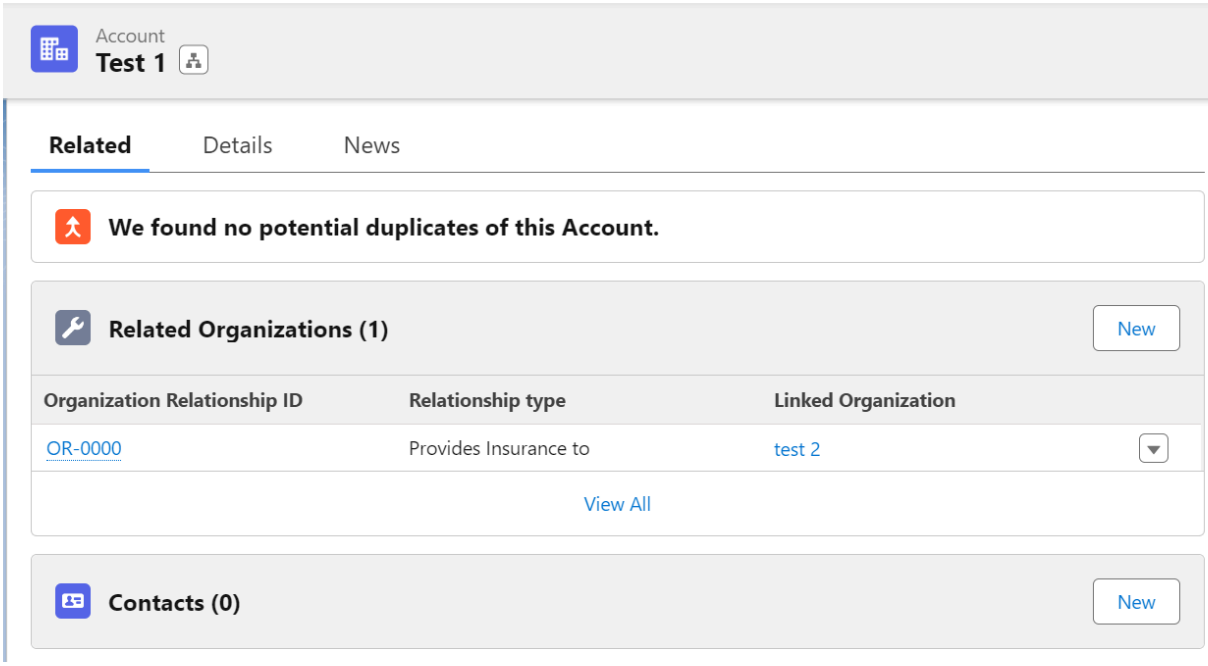
1.2 Click on new under “Related Organizations”.



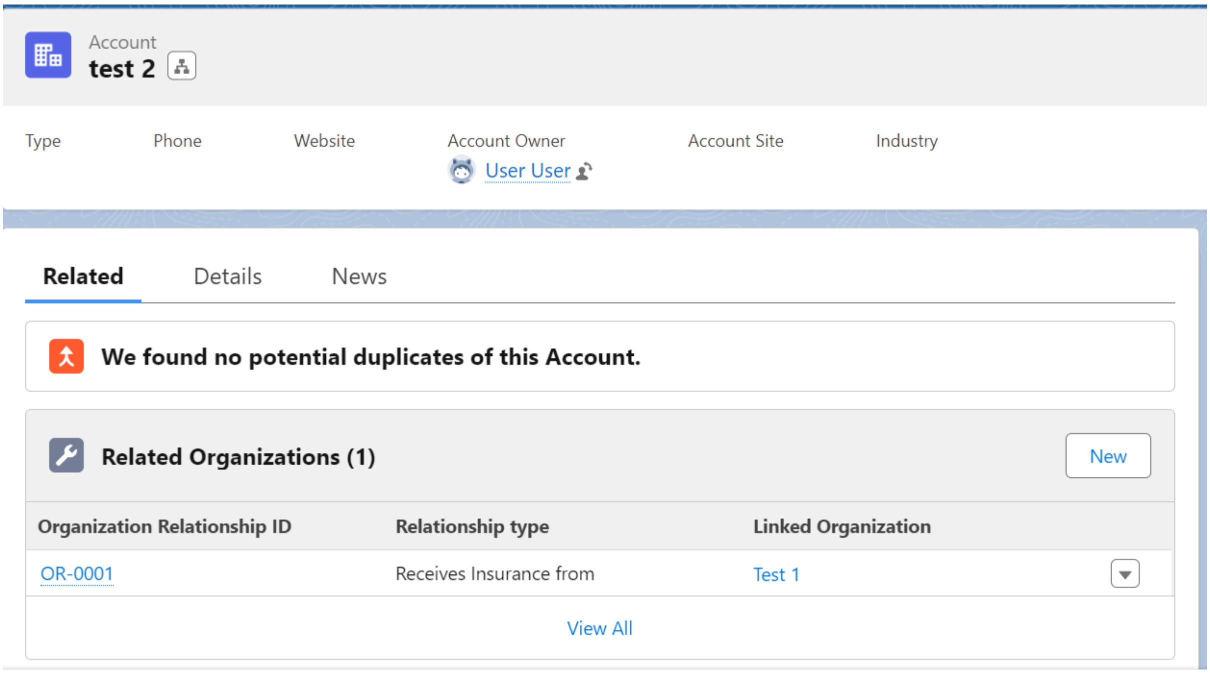
1.3 Select the relationship type and the account you want to relate with.



1.4 Check the related account



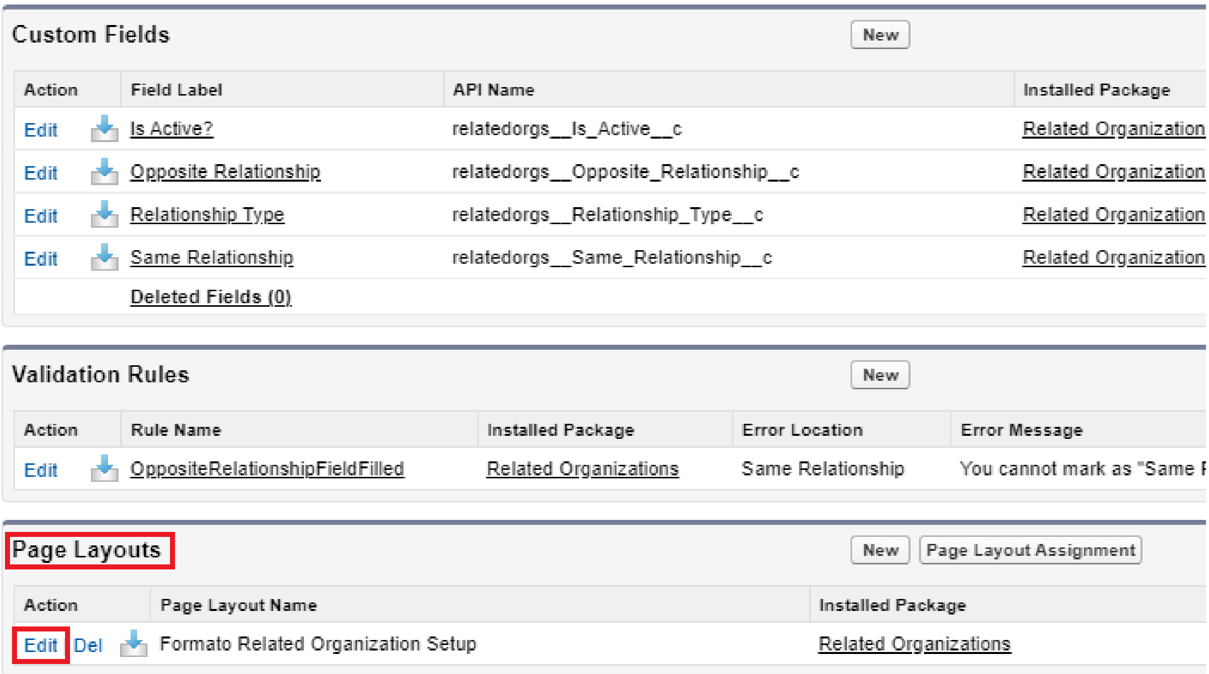
1.5 Click on the account to confirm the relationship is reciprocal.



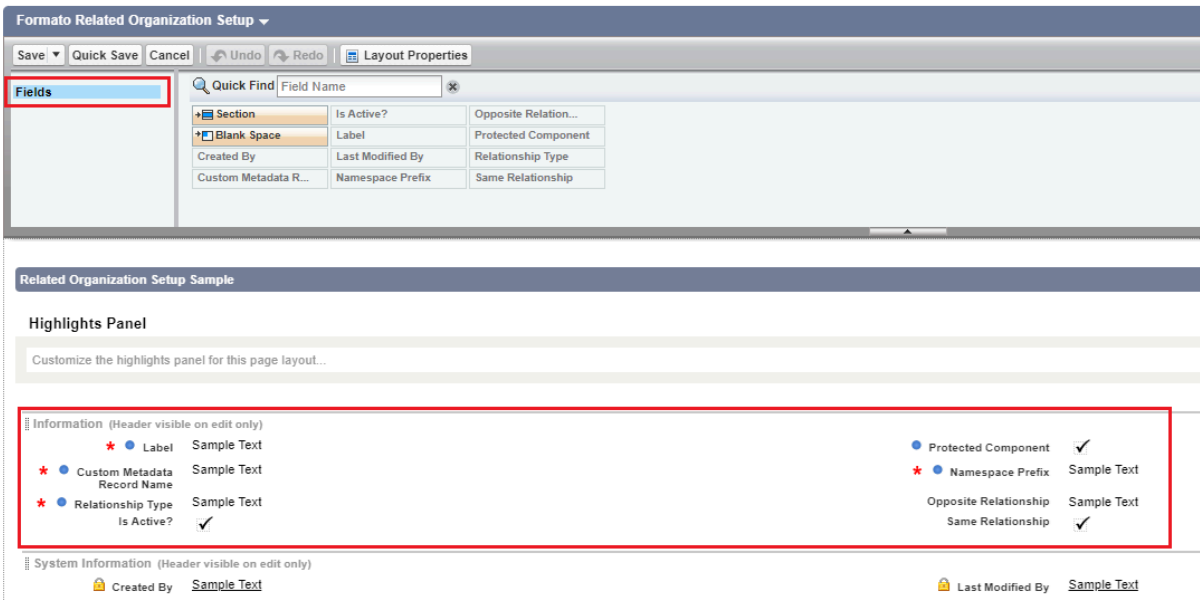
2. Create your own Relationship Type with another account

2.1 Go to Custom Metadata Types and click on the “Related Organization Setup” link.

2.2 Go to the “Page Layout” section and click the “Edit” link

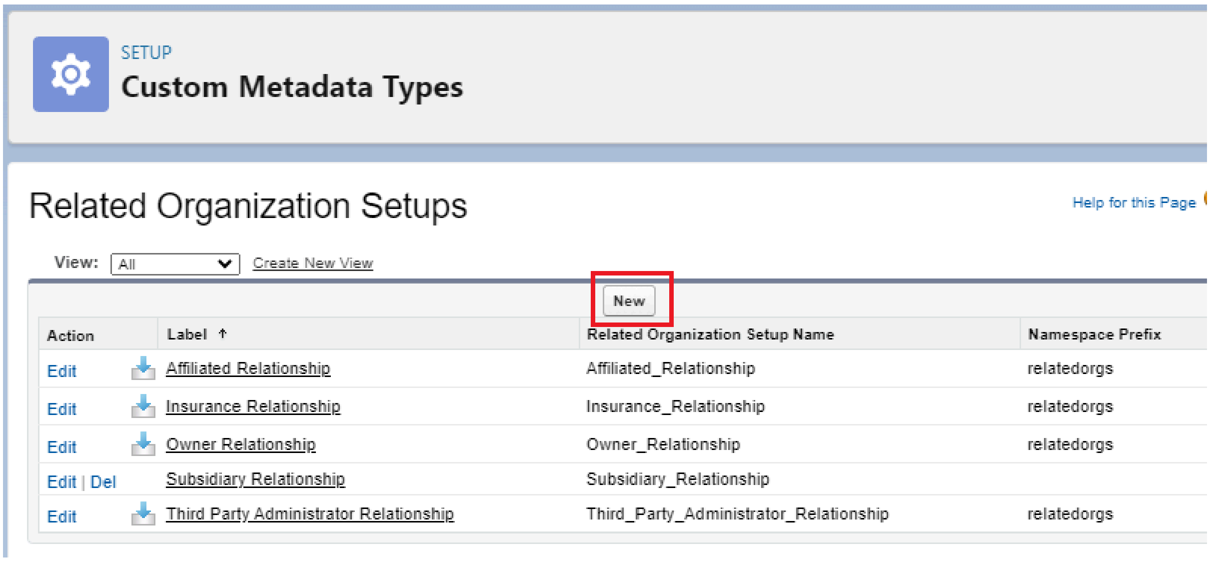


2.3 Drag and drop the fields to the “Information” section like the next screenshot and click Save.



2.4 Go back to Custom Metadata Types and click the “Manage Records” link Related to the “Related Organization Setup” metadata.

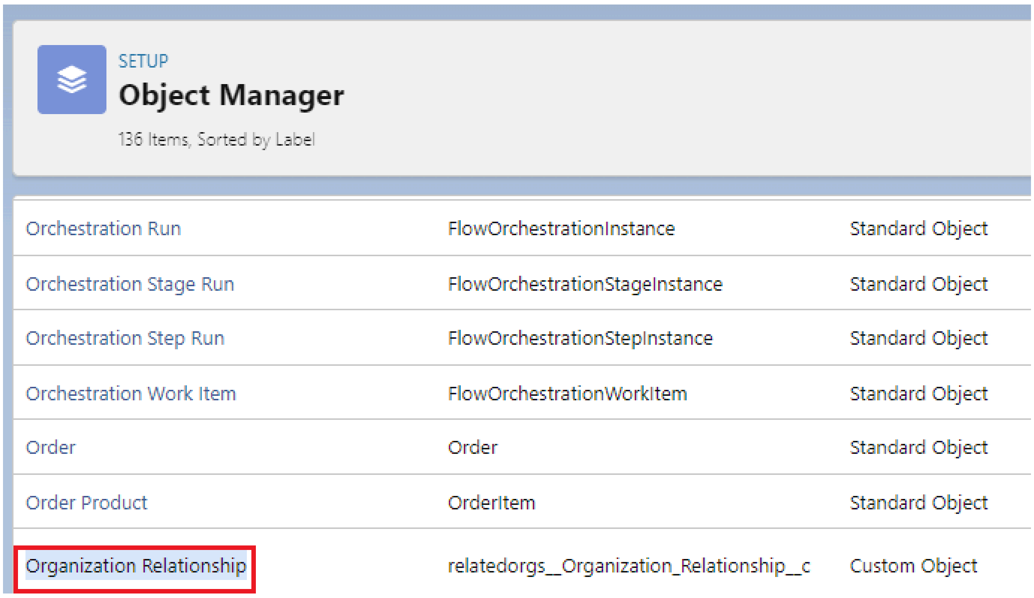
2.5 Click the “New” button and create your new Relationship Type.



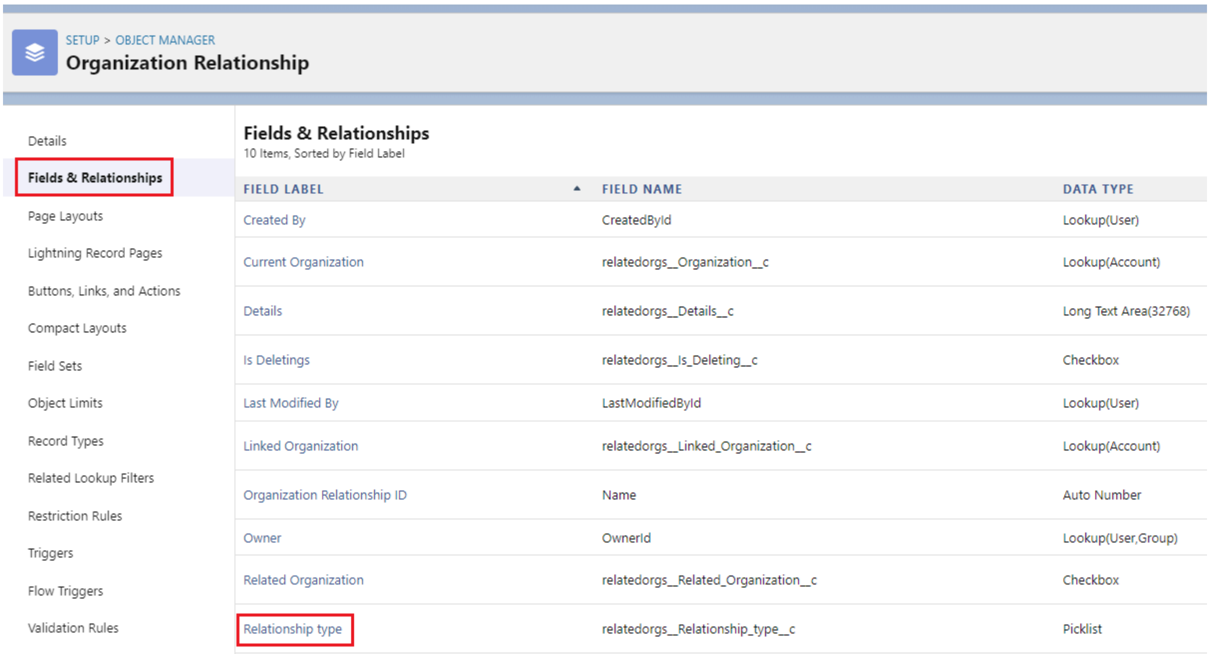
2.6 Fill the fields as the next example with your own data and click Save.

Label: The label of your record.
Related Organization Setup Name: The name of your record.
Relationship Type: Enter your custom relationship type name.
Opposite Relationship: Enter the opposite relationship type name.
Is Active?: Checked
Same Relationship: Only check this option if the relationship type between orgs will be the same. In that case, the Opposite Relationship won’t be mandatory.

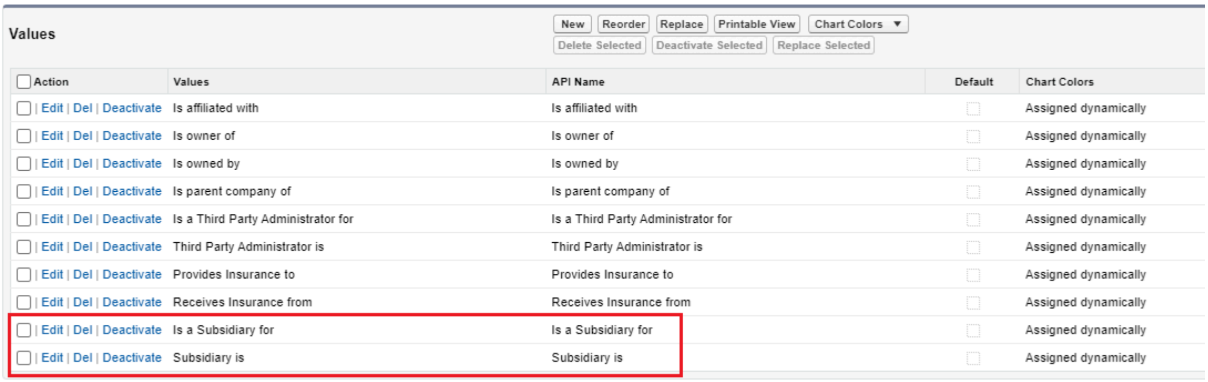
2.7 Go to the Object Manager, look for the “Organization Relationship” object, and click its link.



2.8 Once opened, select the “Fields & Relationships” option from the left menu, and click the “Relationship Type” link



2.9 Scroll down and add the picklist values with the same exact name of the relationship type you set in the Related Organization Setup previously. If you checked the “Same relationship” checkbox, then just add one picklist value.



Values

New | Reorder | Replace | Printable View | Chart Colors

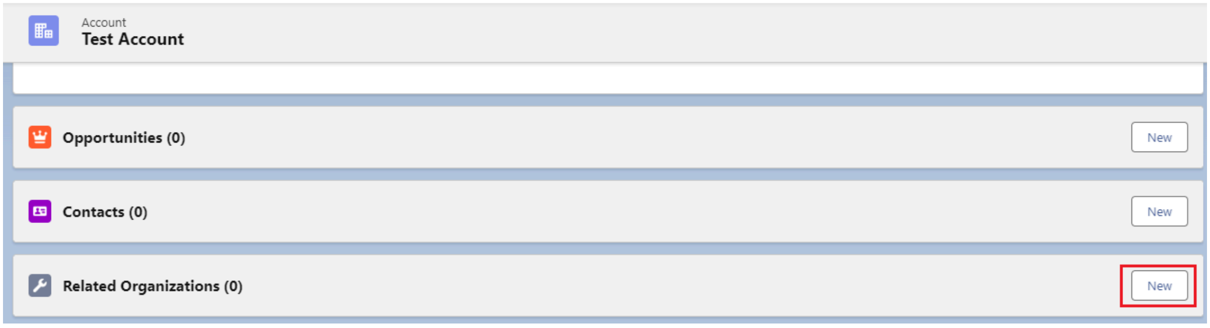
Delete Selected | Deactivate Selected | Replace Selected

Action	Values	API Name	Default	Chart Colors
Edit | Del | Deactivate	Is affiliated with	Is affiliated with		Assigned dynamically
Edit | Del | Deactivate	Is owner of	Is owner of		Assigned dynamically
Edit | Del | Deactivate	Is owned by	Is owned by		Assigned dynamically
Edit | Del | Deactivate	Is parent company of	Is parent company of		Assigned dynamically
Edit | Del | Deactivate	Is a Third Party Administrator for	Is a Third Party Administrator for		Assigned dynamically
Edit | Del | Deactivate	Third Party Administrator is	Third Party Administrator is		Assigned dynamically
Edit | Del | Deactivate	Provides Insurance to	Provides Insurance to		Assigned dynamically
Edit | Del | Deactivate	Receives Insurance from	Receives Insurance from		Assigned dynamically
Edit | Del | Deactivate	Is a Subsidiary for	Is a Subsidiary for		Assigned dynamically
Edit | Del | Deactivate	Subsidiary is	Subsidiary is		Assigned dynamically

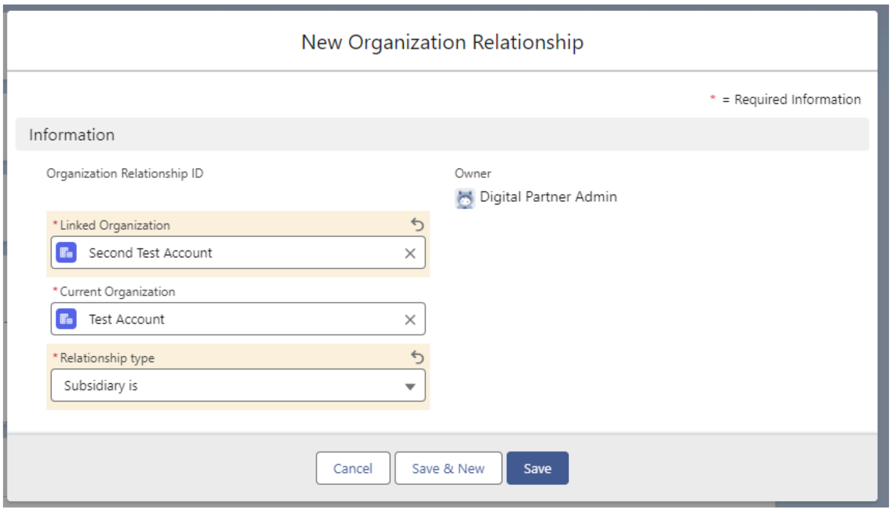
2.10 Now you can test your new relationship type. Follow the example.

Note: In order to create a relationship between accounts, it's necessary to previously add the "Related Organizations" related list in the Account object Page Layout. If you haven't done it yet, now is the time.

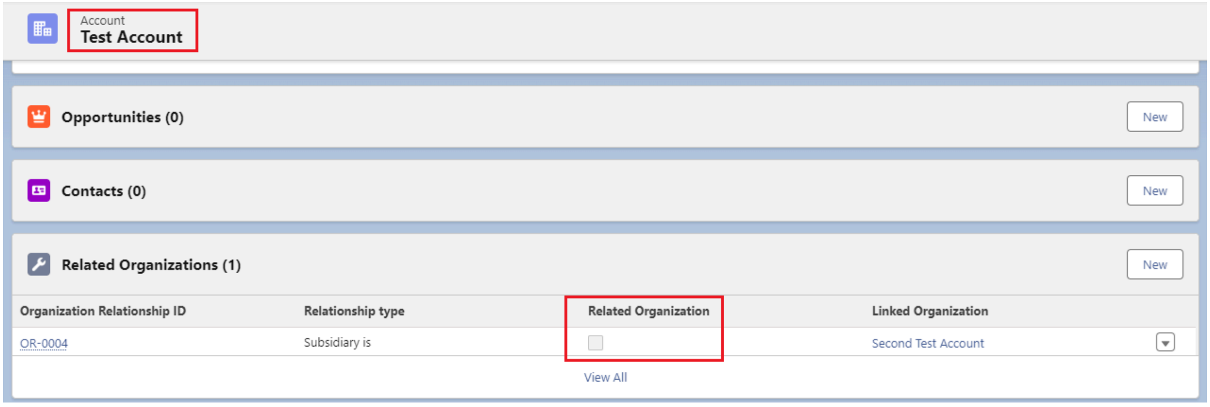
Open your main account record and click the "New" button from the "Related Organizations" related list.

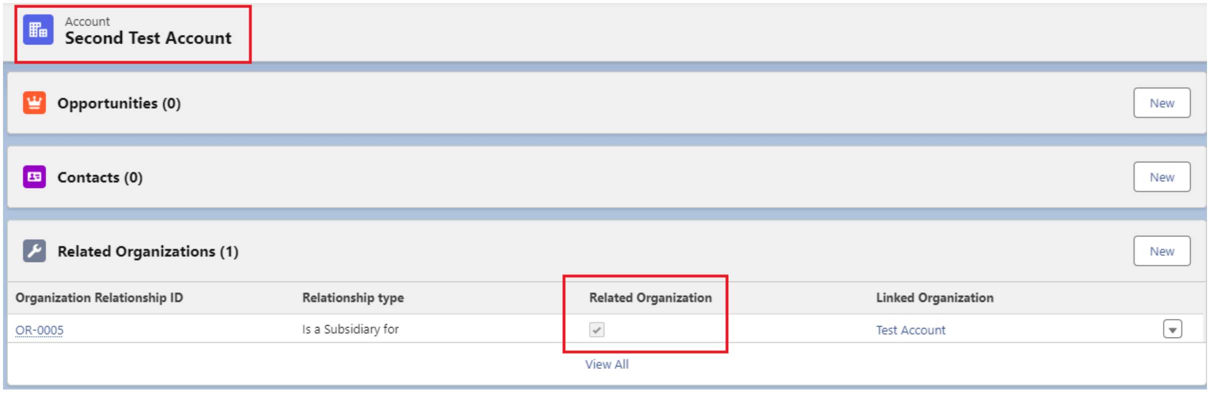


Select your second account in the "Linked Organization" field, and select your new custom relationship type in the "Relationship Type" picklist. Finally, click Save.



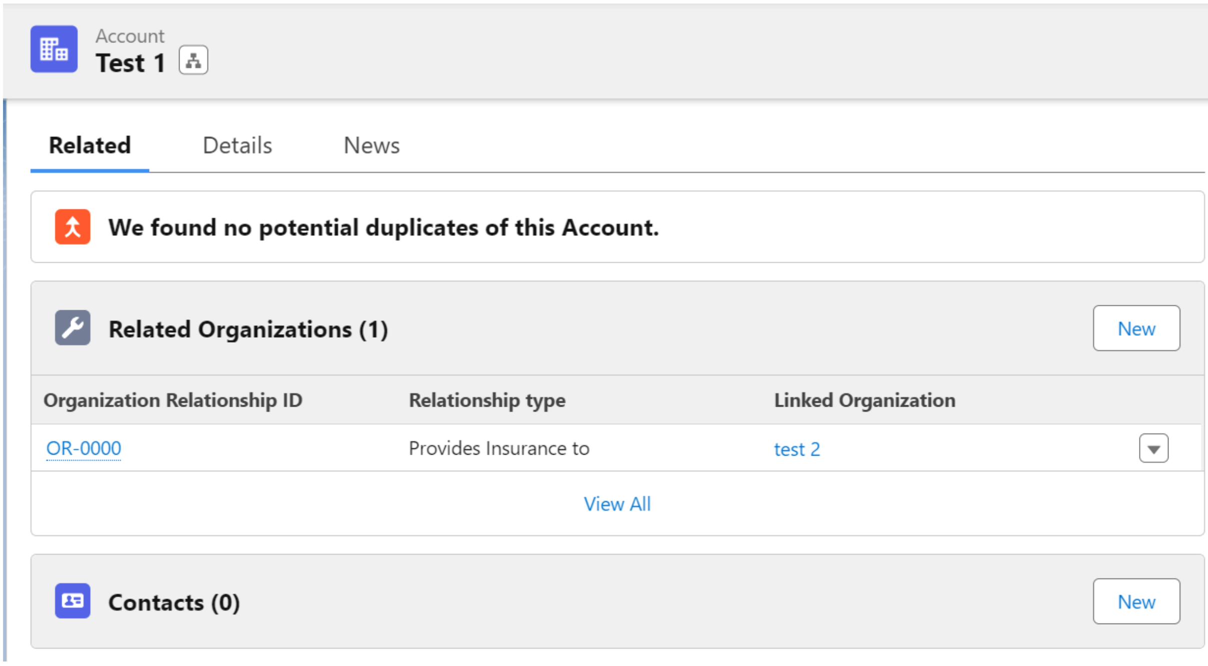
Notice that this new “Related Organizations” record doesn’t have the “Related Organization” checkbox checked, meaning that this is the main account. On the other hand, if you open your second account record, the relationship should be there and the “Related Organization” checkbox should be checked.



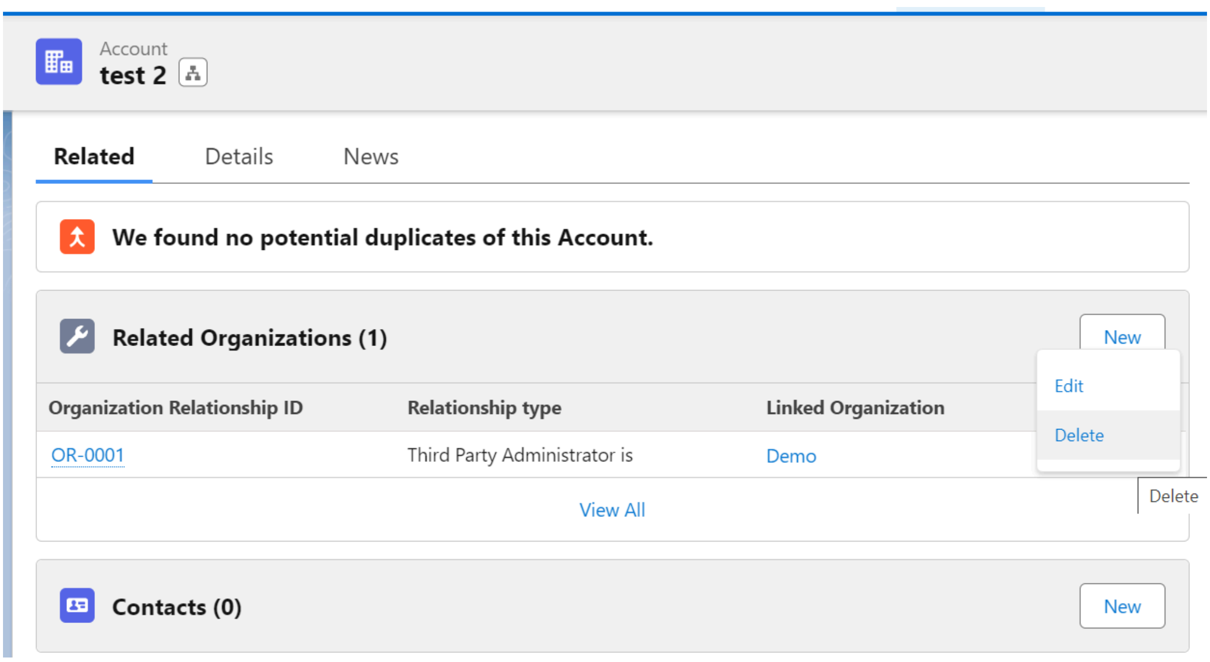


3. Delete Related accounts.

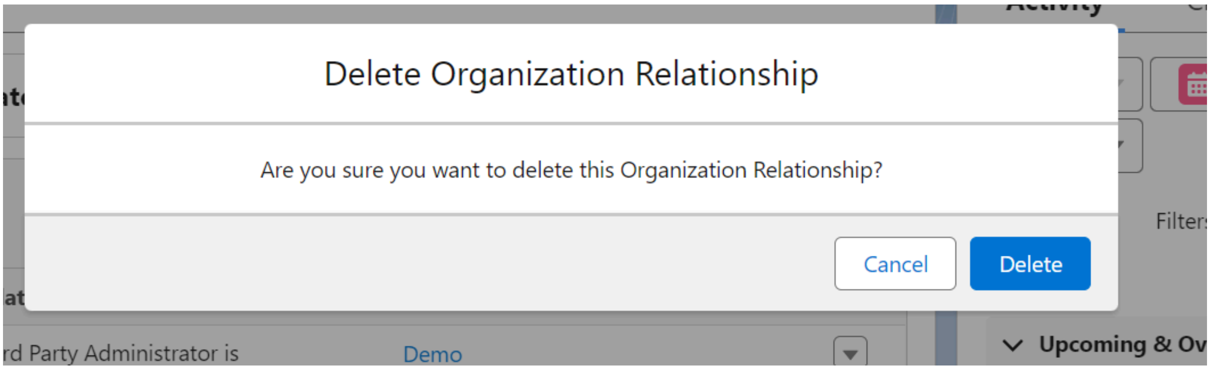
3.1 Click on the accounts tab then select the account you want to delete the relationship from and click on Related.



3.2 Click on the arrow pointing down and click on delete.

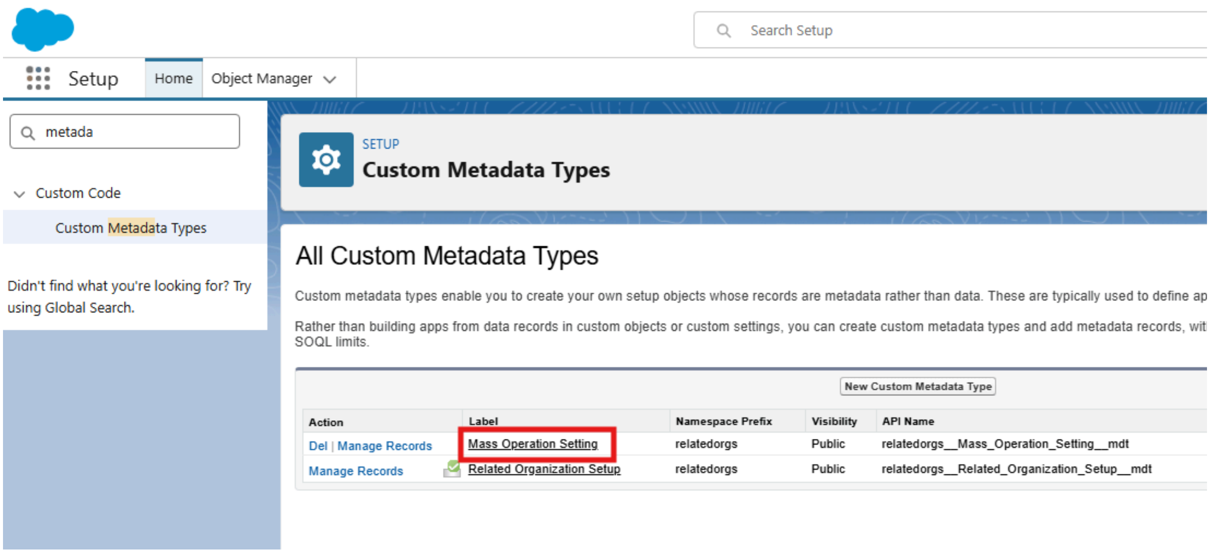


3.3 On the pop-up window, click delete again to confirm the action.

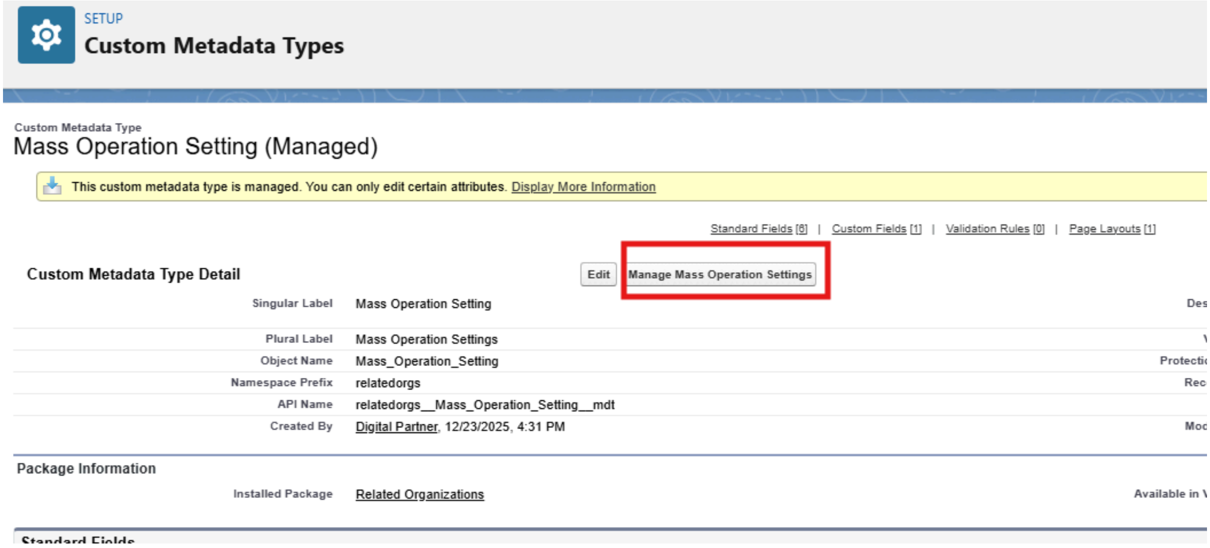


4. Enable Mass Operations (Insert/Delete) for Organization Relationship.

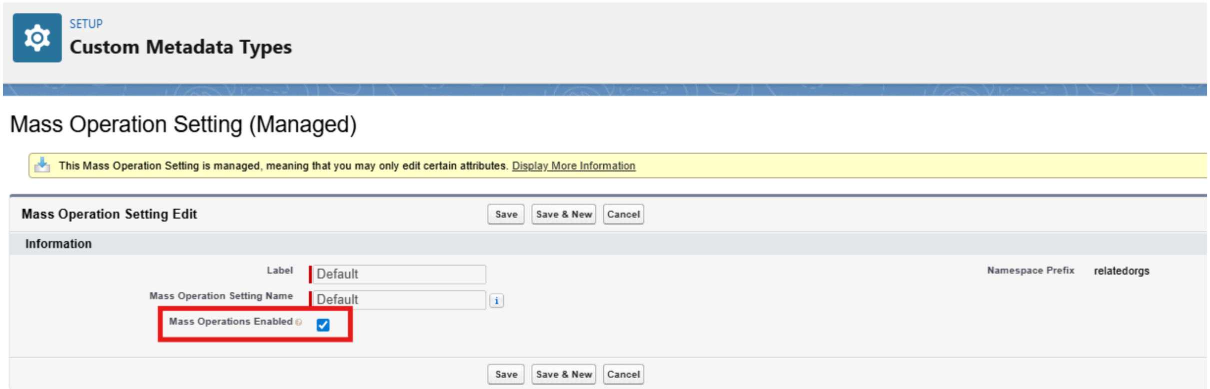
4.1 Go to Setup and search for Custom Metadata Types, click on Mass Operation Setting.



4.2 Click on the Manage Mass Operation Settings button.



4.3 Navigate to the Default record and click Edit. Use the Mass Operations Enabled checkbox to turn mass operations on or off. Mass operations are only enabled when the checkbox is set to true.



Important Notice – Mass Operations Mode

When **Mass Operations Enabled** is turned on, all related automations and validation rules for Organization Relationships are intentionally bypassed to allow high-volume insert and delete operations to run efficiently (Mass updates are not supported).

While this mode is active:

- Automated processes and validations will not execute
- Reciprocal relationship records are not created automatically
- Data integrity becomes the responsibility of the source data being imported or deleted

Administrators must ensure that all required relationships and data consistency rules are handled within the import file itself.

Recommendation: Enable this setting only for the duration of the mass operation and disable it immediately afterward to restore normal package behavior.