

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.

The screenshot shows the 'Account Test 1' page. The header includes fields for Type, Phone, Website, Account Owner (User User), Account Site, and Industry. Below the header, there are three tabs: 'Related' (selected), 'Details', and 'News'. Under the 'Related' tab, there is a message: 'We found no potential duplicates of this Account.' Below this message, there are two sections: 'Related Organizations (0)' and 'Contacts (0)'. Each section has a 'New' button.

1.2 Click on new under “Related Organizations”.

The screenshot shows the 'New Organization Relationship' form. The form has a title 'New Organization Relationship' and a legend '* = Required Information'. The form is divided into two sections: 'Information' and 'Details'. In the 'Information' section, there is a field for 'Organization Relationship ID' and a dropdown menu for '* Relationship type' with the value '--None--'. Below the dropdown, there is a red error message 'Complete this field.' In the 'Details' section, there is a text area for 'Details'. At the bottom of the form, there is a field for '* Current Organization' with the value 'Test 1'. Below this field, there is a field for '* Linked Organization'. At the bottom right of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

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

Information

Organization Relationship ID

* Relationship type

Provides Insurance to

Details

* Current Organization

Test 1

* Linked Organization

test 2

Cancel

Save & New

Save

1.4 Check the related account

Account

Test 1

Related

Details

News

We found no potential duplicates of this Account.

Related Organizations (1)

New

Organization Relationship ID	Relationship type	Linked Organization
OR-0000	Provides Insurance to	test 2
View All		

Contacts (0)

New

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



Account

test 2



Type

Phone

Website

Account Owner

Account Site

Industry

 User User



RelatedDetailsNews



We found no potential duplicates of this Account.



Related Organizations (1)

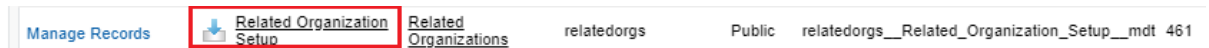
New

Organization Relationship ID	Relationship type	Linked Organization
OR-0001	Receives Insurance from	Test 1

View All

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

Custom Fields New

Action	Field Label	API Name	Installed Package
Edit	Is Active?	relateddorgs__Is_Active__c	Related Organization
Edit	Opposite Relationship	relateddorgs__Opposite_Relationship__c	Related Organization
Edit	Relationship Type	relateddorgs__Relationship_Type__c	Related Organization
Edit	Same Relationship	relateddorgs__Same_Relationship__c	Related Organization
Deleted Fields (0)			

Validation Rules New

Action	Rule Name	Installed Package	Error Location	Error Message
Edit	OppositeRelationshipFieldFilled	Related Organizations	Same Relationship	You cannot mark as "Same f

Page Layouts New Page Layout Assignment

Action	Page Layout Name	Installed Package
Edit Del	Formato Related Organization Setup	Related Organizations

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

Formato Related Organization Setup

Save Quick Save Cancel Undo Redo Layout Properties

Fields Quick Find Field Name

Section	Is Active?	Opposite Relation...
Blank Space	Label	Protected Component
Created By	Last Modified By	Relationship Type
Custom Metadata R...	Namespace Prefix	Same Relationship

Related Organization Setup Sample

Highlights Panel

Customize the highlights panel for this page layout...

Information (Header visible on edit only)

★ Label	Sample Text	Protected Component	✓
★ Custom Metadata Record Name	Sample Text	Namespace Prefix	Sample Text
★ Relationship Type	Sample Text	Opposite Relationship	Sample Text
Is Active?	✓	Same Relationship	✓

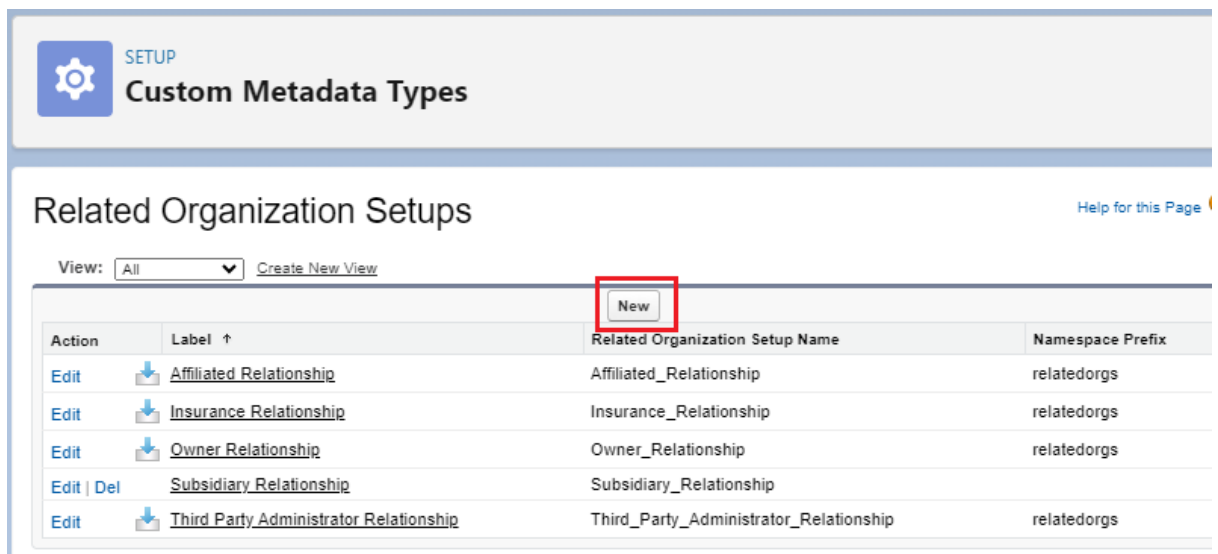
System Information (Header visible on edit only)

Created By Sample Text Last Modified By Sample Text

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.

The screenshot shows the 'Related Organization Setup Edit' form. The fields are filled with the following example data:

- Label:** Subsidiary Relationship
- Related Organization Setup Name:** Subsidiary_Relationship
- Relationship Type:** Is a Subsidiary for
- Is Active?:** ☒
- Protected Component:** ☐ [i](#)
- Namespace Prefix:**
- Opposite Relationship:** Subsidiary is
- Same Relationship:** ☐

Buttons at the bottom include 'Save', 'Save & New', and 'Cancel'.

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.

 SETUP Object Manager 136 Items, Sorted by Label		
Orchestration Run	FlowOrchestrationInstance	Standard Object
Orchestration Stage Run	FlowOrchestrationStageInstance	Standard Object
Orchestration Step Run	FlowOrchestrationStepInstance	Standard Object
Orchestration Work Item	FlowOrchestrationWorkItem	Standard Object
Order	Order	Standard Object
Order Product	OrderItem	Standard Object
Organization Relationship	relatedorgs__Organization_Relationship__c	Custom Object

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

 SETUP > OBJECT MANAGER Organization Relationship			
- Details Fields & Relationships - Page Layouts - Lightning Record Pages - Buttons, Links, and Actions - Compact Layouts - Field Sets - Object Limits - Record Types - Related Lookup Filters - Restriction Rules - Triggers - Flow Triggers - Validation Rules	Fields & Relationships 10 Items, Sorted by Field Label		
	FIELD LABEL	FIELD NAME	DATA TYPE
	Created By	CreatedById	Lookup(User)
	Current Organization	relatedorgs__Organization__c	Lookup(Account)
	Details	relatedorgs__Details__c	Long Text Area(32768)
	Is Deletings	relatedorgs__Is_Deleting__c	Checkbox
	Last Modified By	LastModifiedById	Lookup(User)
	Linked Organization	relatedorgs__Linked_Organization__c	Lookup(Account)
	Organization Relationship ID	Name	Auto Number
	Owner	OwnerId	Lookup(User,Group)
	Related Organization	relatedorgs__Related_Organization__c	Checkbox
	Relationship type	relatedorgs__Relationship_type__c	Picklist

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				
NewReorderReplacePrintable ViewChart Colors Delete SelectedDeactivate SelectedReplace 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.

Account

Test Account

Opportunities (0)

New

Contacts (0)

New

Related Organizations (0)

New

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

New Organization Relationship

* = Required Information

Information

Organization Relationship ID

Owner

Digital Partner Admin

* Linked Organization

Second Test Account

* Current Organization

Test Account

* Relationship type

Subsidiary is

Cancel

Save & New

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.

Account

Test Account

Opportunities (0)

New

Contacts (0)

New

Related Organizations (1)

New

Organization Relationship ID	Relationship type	Related Organization	Linked Organization
OR-0004	Subsidiary is	☐	Second Test Account

View All

Account

Second Test Account

Opportunities (0)

New

Contacts (0)

New

Related Organizations (1)

New

Organization Relationship ID	Relationship type	Related Organization	Linked Organization
OR-0005	Is a Subsidiary for	☒	Test Account

View All

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.

Account
Test 1

Related

Details

News

 We found no potential duplicates of this Account.

 **Related Organizations (1)**

New

Organization Relationship ID	Relationship type	Linked Organization
OR-0000	Provides Insurance to	test 2

View All

 **Contacts (0)**

New

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

Account
test 2

Related

Details

News

 We found no potential duplicates of this Account.

 **Related Organizations (1)**

New

Organization Relationship ID	Relationship type	Linked Organization
OR-0001	Third Party Administrator is	Demo

View All

 **Contacts (0)**

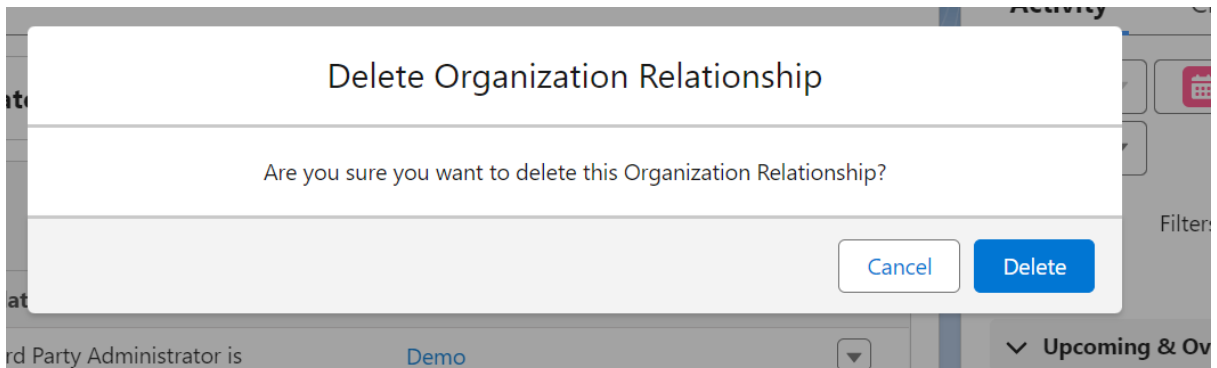
New

Edit

Delete

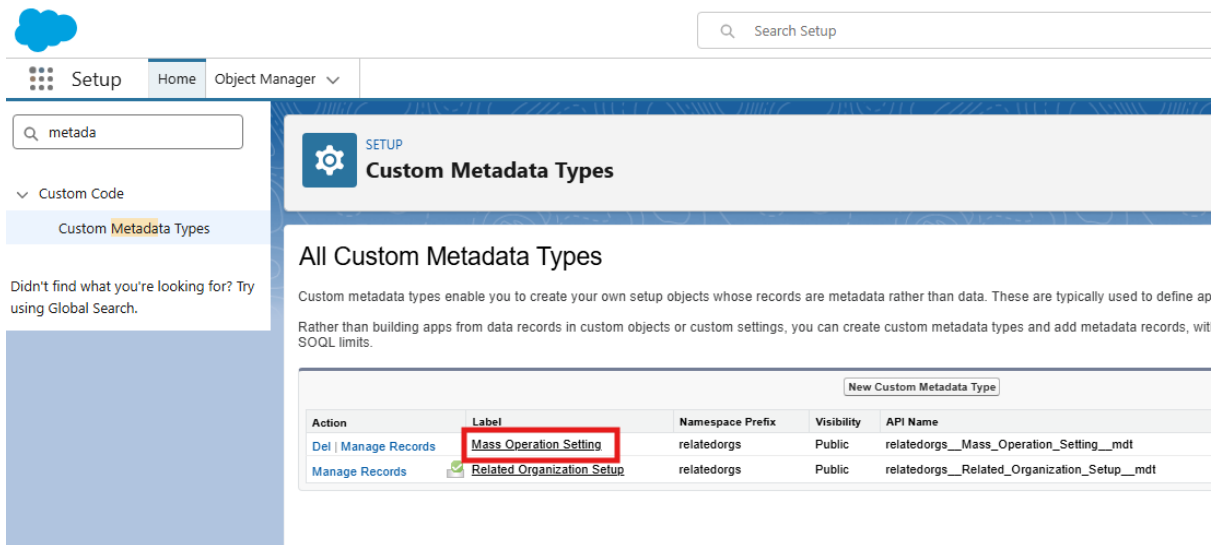
Delete

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.

SETUP Custom Metadata Types

Custom Metadata Type
Mass Operation Setting (Managed)

This custom metadata type is managed. You can only edit certain attributes. [Display More Information](#)

Standard Fields (8) | Custom Fields (1) | Validation Rules (0) | Page Layouts (1)

Custom Metadata Type Detail

Singular Label	Mass Operation Setting	Des
Plural Label	Mass Operation Settings	1
Object Name	Mass_Operation_Setting	Protectio
Namespace Prefix	relatedorgs	Rec
API Name	relatedorgs__Mass_Operation_Setting__mdt	
Created By	Digital Partner, 12/23/2025, 4:31 PM	Moc

Package Information

Installed Package	Related Organizations	Available in 1
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Standard Fields

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.

SETUP Custom Metadata Types

Mass Operation Setting (Managed)

This Mass Operation Setting is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Mass Operation Setting Edit

Save Save & New Cancel

Information

Label	Default	Namespace Prefix	relatedorgs
Mass Operation Setting Name	Default		
Mass Operations Enabled	☒		

Save Save & New Cancel

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.