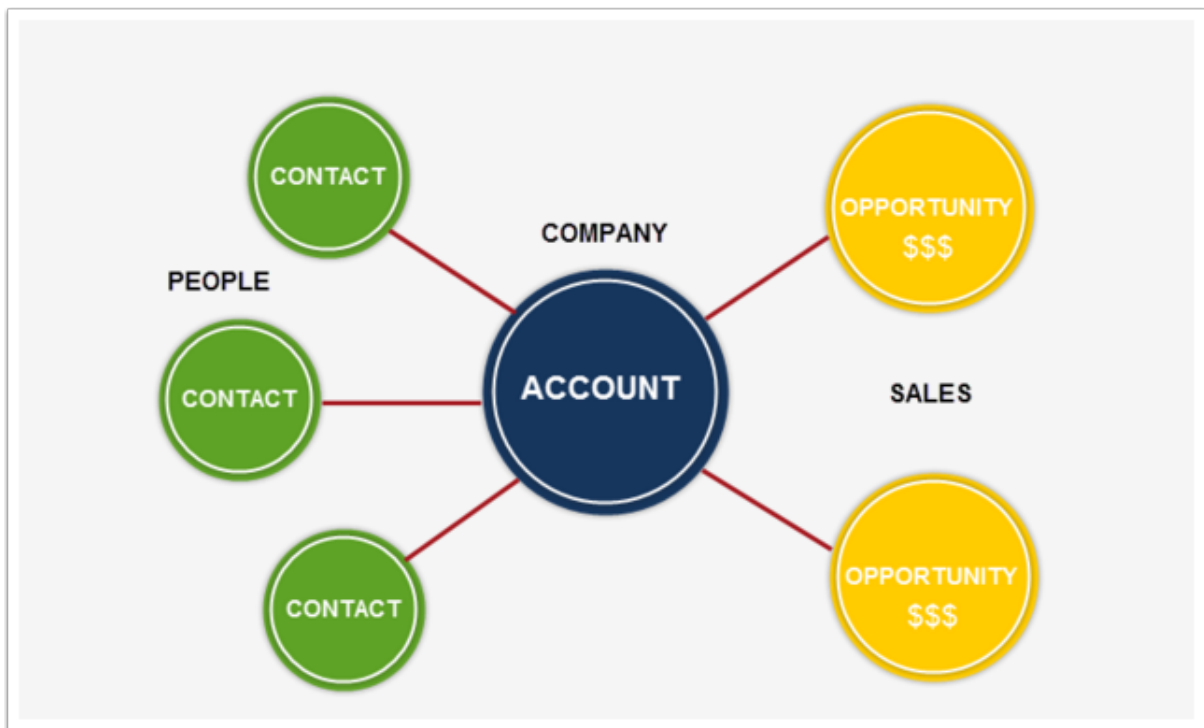


Salesforce Related Organizations Components.

Technical Manual for Admins



Version Control

Version #	Performed by	Date	Reason for changes
1.0	Erick Vega	07/07/2023	
1.1	Edgardo Escobar	12/30/2025	Mass Operations Feature

Objective

The objective of this technical manual is to provide comprehensive instructions for setting up a Salesforce Component designed to enhance the management of related accounts at the same level. The manual will guide administrators and users through the configuration process, enabling them to effectively utilize the Salesforce Component and leverage its features to streamline workflows, improve collaboration, and optimize account management efficiency. By following this manual, users will gain a thorough understanding of the setup requirements, customization options, and best practices for maximizing the benefits of the Salesforce Component, ultimately empowering them to enhance the coordination and productivity of related accounts within their organization.

Index

Version Control.....	2
Metadata Components Overview.....	5
Objects Reference.....	6
Related organization Setup.....	7
Setup.....	8

Metadata Components Overview

Component	Type	Description
Organization Relationship	Custom Object	Main object of the component where the relationships are created.
Related Organization Setup	Custom Metadata Type	CMDT where the relationships to be created are configured.
Mass Operation Setting	Custom Metadata Type	CMDT Enables or disables bypassing Account Linker validations and automations for mass data operations.
Related Organization Flow	Flow	Flow that contains the logic to create the relationship. When Mass Operations Enabled is set to true, this flow is bypassed.
Related Organization Before Delete Flow	Flow	Flow that contains the logic to delete the opposite relationship. When Mass Operations Enabled is set to true, this flow is bypassed.
Related Organization Delete Flow	Flow	Flow to delete the opposite relationship by ID. When Mass Operations Enabled is set to true, this flow is bypassed.
Organization_RelationshipTriggerHandler	Apex Class	Class that manages the Organization_RelationshipTrigger's trigger events.
Organization_Relationship_TestClass	Apex Class	This class validates the Organization_RelationshipTrigger's functionality.
Organization_RelationshipTrigger	Apex Trigger	Trigger of the Organization Relationship object. Its logic is controlled by the Organization_RelationshipTriggerHandler.
CurrentOrgFieldUpdateError	Custom Label	It is used to show the text error message when a user tries to change the Current Organization.
LinkedOrgFieldUpdateError	Custom Label	It is used to show the text error message when a user tries to change the Linked Organization.
RelationshipTypeFieldUpdateError	Custom Label	It is used to show the text error message when a user tries to change the

Component	Type	Description
		Relationship Type.

Object Reference

Organization Relationship

- Custom Fields

Field Label	API Name	Data Type	Description
Relationship type	Relationship_type__c	Picklist	Required. Value of the Relationship Type.
Current Organization	Organization__c	Lookup(Account)	Required. Account from which the relationship is created.
Linked Organization	Linked_Organization__c	Lookup(Account)	Required. Account where the relationship is created.
Related Organization	Related_Organization__c	Checkbox	Field to be marked when creating the Opposite Relationship. Used in "Related Organization Flow"
Is Deleting	Is_Deleting__c	Checkbox	Field to be marked when deleting the Opposite Relationship. Used in "Related Organization Before Delete Flow"
Details	Details__c	Long Text Area	Field used to save optional details about the relationship

Validation Rules.

Rule Name	Error Message	Active	Description
SameOrganization	Cannot select the same organization .	YES	Prevents to select the same Account in Current Organization and Linked Organization fields. When Mass Operations Enabled is set to true, this validation rule is bypassed.

Apex Classes

Name	Description	Methods
Organization_RelationshipTriggerHandler	This Apex Class is in charge of handling the Organization_RelationshipTrigger's logic.	<i>OnBeforeUpdate:</i> It is used to prevent the modification of existing organization relationships.

Apex Triggers

Name	Description
Organization_RelationshipTrigger	This Apex Trigger captures the Organization_Relationship object's trigger events, and all of them are managed by the Organization_RelationshipTriggerHandler.

Related Organization Setup

- Custom Fields

Field Label	API Name	Data Type	Description
Relationship Type	Relationship_Type__c	Text(150)	Required. Value of the Relationship Type **
Opposite Relationship	Opposite_Relationship__c	Text(150)	Value of the Opposite Relationship **
Same Relationship	Same_Relationship__c	Checkbox	When the field is checked the value of Opposite Relationship will be the same value in Relationship Type.
Is Active?	Is_Active__c	Checkbox	Check if the relationship is active.
Purpose	Purpose__c	Text Area(255)	This field will be used to record a brief description or explanation of the purpose behind the Related Organization Setup.

** Values MUST be the same as in the Relationship Type (Relationship_type__c) field of the Organization Relationship object.

Validation Rules

Rule Name	Error Message	Active	Description
OppositeRelationshipFieldFilled	You cannot mark as "Same Relationship" if the Opposite Relationship field has a value equal to Relationship Type.	YES	Prevents the Same Relationship field from being marked if the Opposite Relationship field has any value.

Setup

Once the component is installed, you must configure the reciprocal relationships in the "Related Organization Setup" custom metadata type as follows:

- Review the default values of the "Relationship Type" field in the "Organization Relationship" object. If desired, you can add or remove values from the picklist field.

The screenshot shows the 'Organization Relationship' page in the Salesforce Setup interface. The left sidebar contains navigation links: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, and Object Limits. The main content area is titled 'Values' and includes a table with columns: Action, Values, API Name, Default, Chart Colors, and Modified By. The table lists several relationship types, all of which are 'Assigned dynamically' and were last modified by 'User User' on 6/7/2023 at 14:09.

Action	Values	API Name	Default	Chart Colors	Modified By
Edit Del Deactivate	Is affiliated with	Is affiliated with	☐	Assigned dynamically	User User, 6/7/2023, 14:09
Edit Del Deactivate	Is owner of	Is owner of	☐	Assigned dynamically	User User, 6/7/2023, 14:09
Edit Del Deactivate	Is owned by	Is owned by	☐	Assigned dynamically	User User, 6/7/2023, 14:09
Edit Del Deactivate	Is parent company of	Is parent company of	☐	Assigned dynamically	User User, 6/7/2023, 14:09
Edit Del Deactivate	Is a Third Party Administrator for	Is a Third Party Administrator for	☐	Assigned dynamically	User User, 6/7/2023, 14:09
Edit Del Deactivate	Third Party Administrator is	Third Party Administrator is	☐	Assigned dynamically	User User, 6/7/2023, 14:09
Edit Del Deactivate	Provides Insurance to	Provides Insurance to	☐	Assigned dynamically	User User, 6/7/2023, 14:09
Edit Del Deactivate	Receives Insurance from	Receives Insurance from	☐	Assigned dynamically	User User, 6/7/2023, 14:09

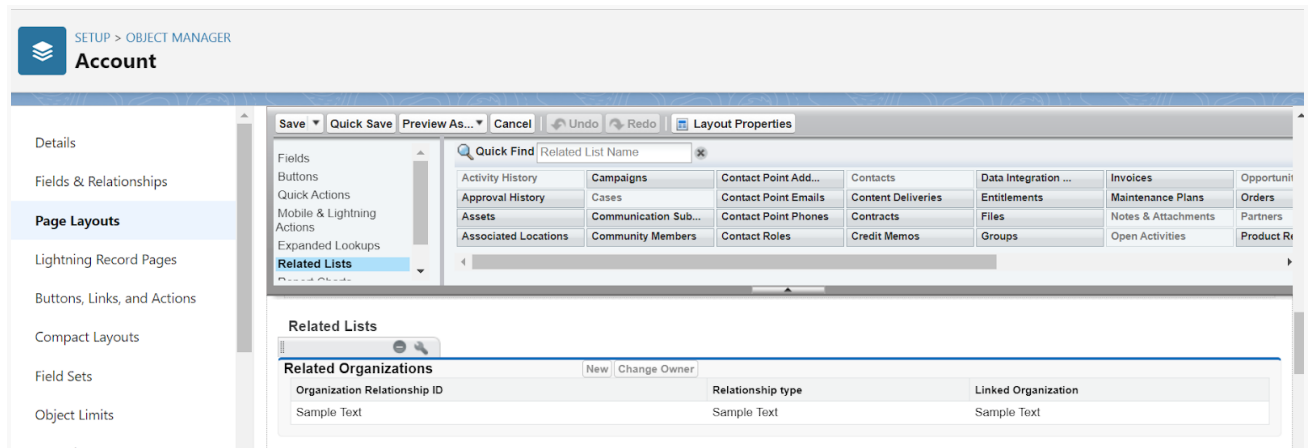
- From Salesforce Setup, go to Custom Metadata Types and select "Manage Records" next to "Related Organization Setup" CMDT. By default some configurations are included as examples, you can add new ones, delete them or modify them according to your needs.

The screenshot shows the 'Custom Metadata Types' page in the Salesforce Setup interface. The left sidebar contains navigation links: Setup (selected), Home, and Object Manager. The main content area is titled 'Custom Metadata Types' and includes a section for 'Related Organization Setups'. This section has a 'View' dropdown set to 'All' and a 'Create New View' link. Below this is a table with columns: Action, Label, and Related Organization Setup Name. The table lists four relationship types, all of which are 'Assigned dynamically' and were last modified by 'User User' on 6/7/2023 at 14:09.

Action	Label	Related Organization Setup Name
Edit Del	Affiliated Relationship	Affiliated_Relationship
Edit Del	Insurance Relationship	Insurance_Relationship
Edit Del	Owner Relationship	Owner_Relationship
Edit Del	Third Party Administrator Relationship	Third_Party_Administrator_Relationship

- You also have to make sure that the profile for the testing or the System Admin profiles have read/edit rights to the fields under the `Organization_Relationship__c` object from the setup menu.

- Also make sure to add the related list "Organization Relationship ID" to the page layouts as indicated in the image.



Example

If the "Relationship Type" field contains the following values:

Value	API Name
Is affiliated with	Is affiliated with
Is owner of	Is owner of
Is owned by	Is owned by
Is a Third Party Administrator for	Is a Third Party Administrator for
Third Party Administrator is	Third Party Administrator is

You will need to create new records in "Related Organization Setup" as follows:

Label	Relationship Type	Opposite Relationship	Same Relationship	Is Active?	Purpose
Affiliated Relationship	Is affiliated with		YES	YES	Create a relationship of the same type "Is affiliated with" between two accounts.

Label	Relationship Type	Opposite Relationship	Same Relationship	Is Active?	Purpose
Insurance Relationship	Provides Insurance to	Receives Insurance from	NO	YES	Create a "Receives Insurance from" relationship with the Account if "Provides Insurance to" has been selected as the primary relationship. If "Receives Insurance from" has been selected, the new relationship will be created as "Provides Insurance to".

Note: The values entered in the "Relationship Type" and/or "Opposite Relation" fields MUST be equal to the API Name of the value in the "Relationship Type" field of the "Organization Relationship" object.