

Buying Groups

Installation & Setup Guide

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This guide walks you through installing and configuring the Buying Groups app in your Salesforce organisation. The installation process takes approximately 15 minutes.

Prerequisites

Before installing Buying Groups, ensure the following:

- Salesforce Edition: Enterprise, Professional, Unlimited, Performance or Developer
- Lightning Experience is enabled in your org
- You are a Salesforce System Administrator
- You have access to Setup

Section 1 - Installing the Package

Step 1 - Install the Package

Navigate to the installation URL or find Buying Groups on the Salesforce AppExchange. When prompted, choose one of the following installation options:

Option	Description	Recommended For
Install for Admins Only	Only System Administrators can access the app initially	First-time installation - recommended
Install for All Users	All users get access immediately	If you want immediate access for all users
Install for Specific Profiles	Choose which profiles get access	Advanced user management

Note: We recommend 'Install for Admins Only' for the initial installation. You can grant access to other users via the Permission Set in Step 2.

Step 2 - Assign the Permission Set

After installation, assign the Buying Groups User permission set to all users who need access to the app.

1. Go to Setup
2. Search for Users in the Quick Find box
3. Click on the user you want to grant access to
4. Scroll down to Permission Set Assignments
5. Click Edit Assignments
6. Add Buying Groups User to the Enabled Permission Sets list
7. Click Save

Note: System Administrators automatically have access to all objects and do not need the permission set assigned. The permission set is required for all non-admin users.

Step 3 - Make Buying Group Fields Visible on Account and Lead

Buying Groups adds custom fields to the Account, Lead, Contact and Opportunity objects. The package includes pre-built Lightning pages for Account and Lead that already contain these fields. You have two options:

Option A - Use the included Lightning pages (recommended for most customers):

1. Go to Setup - Lightning App Builder
2. Find 'Account Record Page Buying Groups' and click Edit
3. Click Activation and assign it to the appropriate profiles or make it the org default
4. Repeat for 'Lead Record Page Buying Groups'

Option B - Add fields to your existing page layouts manually (recommended if you have heavily customised layouts):

Object	Fields to Add
Account	Buying Group, Buying Group Role, Match Type
Lead	Buying Group, Match Type
Contact	Buying Group
Opportunity	Buying Group

1. Go to Setup - Object Manager
2. Select the object (e.g. Account)
3. Click Page Layouts
4. Click Edit on the layout you want to update
5. Drag the Buying Group fields from the field palette onto the layout
6. Click Save

Note: Contact and Opportunity do not have pre-built Lightning pages included - use Option B to add the Buying Group field to those objects manually.

Section 2 - Configuring Default Settings

A Default Settings record is created automatically when the package is installed. You can review and adjust these settings at any time by navigating to the Buying Groups app and clicking the Settings tab.

Step 4 - Review and Configure Default Settings

Navigate to the Buying Groups app from the App Launcher and open the Default Settings record. The following settings are available:

Setting	Default	Description
Automation Tier	Automatic	Controls how Buying Groups are created. Automatic = fully automated. Suggested = creates Tasks for review. Manual = no automation.
Enable Exact Name Matching	Checked	Matches records with identical company names.
Enable Stripped Exact Name Matching	Checked	Matches records after removing common suffixes such as Ltd, Inc, Corp.
Enable Hierarchy Matching	Checked	Groups child Accounts with their parent Account Buying Group.
Enable Fuzzy Name Matching	Checked	Matches records with similar but not identical names using the Jaro-Winkler algorithm.
Enable Email Domain Matching	Checked	Matches Leads to Accounts sharing the same corporate email domain.
Fuzzy Match Threshold	90	Minimum similarity score (0-100) for fuzzy name matching. Higher values require closer matches. Default of 90 is recommended for most use cases.
Remove Empty Buying Groups	Unchecked	When checked, automatically deletes Buying Groups that have no members.
Max Records Per Run	500	Maximum number of records processed per batch run. Maximum allowed value is 1000.
Engagement Score Days	90	Rolling window in days for campaign engagement score calculation.
Name Prefix Strip List	the, a, an	Prefixes removed from company names before stripped name matching.
Name Suffix Strip List	ltd, limited, inc...	Suffixes removed from company names before stripped name matching.
Public Domain Blocklist	gmail.com, yahoo.com...	Email domains excluded from email domain matching. Common public email providers are included by default.

Important: Do not rename the Default Settings record. The record must always be named 'Default Settings'. Only one Settings record can exist at any time.

Section 3 - Running Your First Match

Step 5 - Run the Initial Buying Group Matching Batch

After configuring your settings, run the Initial Sweep batch to analyse your existing Accounts and Leads and create Buying Groups.

1. Navigate to the Buying Groups app from the App Launcher
2. Click the Run Buying Group Matching button
3. Review the confirmation dialog which shows the number of records that will be processed
4. Click Confirm to start the batch
5. The batch runs asynchronously - you can monitor progress in Setup under Apex Jobs
6. When complete, a Batch Log record is created with the results

Note: The batch processes up to Max Records Per Run accounts and leads per run. If you have more unassigned records, run the batch multiple times until all records are processed.

Step 6 - Review the Results

After the batch completes, review the Buying Groups that have been created:

- Navigate to the Buying Groups tab to see all created Buying Groups
- Check the Batch Log record for a summary of processed records
- Review individual Account and Lead records to confirm they have been assigned correctly
- Check the Match Type field on Accounts and Leads to understand how each record was matched

Section 4 - Key Concepts

Step 7 - Understanding Match Types

The Match Type field on Account and Lead records indicates how the record was matched to its Buying Group:

Match Type	Description
Original - Automatic	This record created the Buying Group via automatic matching
Original - Manual	This record created the Buying Group via manual assignment
Exact Name	Matched to an existing BG via exact name match
Stripped Exact Name	Matched after removing name prefixes/suffixes
Hierarchy	Matched via the Salesforce Account parent hierarchy
Fuzzy Name	Matched via fuzzy name similarity algorithm
Email Domain	Matched via shared corporate email domain (Leads only)
Manual	Manually assigned to a Buying Group by a user

Step 8 - Understanding Matching Tier

The Matching Tier field on the Buying Group record indicates how the group was created:

Matching Tier	Description
Automatic	The Buying Group was created by the matching engine with no user input
Manual	The Buying Group was created manually or the first Account was manually assigned

Step 9 - Understanding Engagement Scoring

Buying Groups tracks campaign engagement across all members of a buying committee:

- Campaign Responses on the Buying Group Member record - number of Salesforce Campaign responses for that member within the Engagement Score Days rolling window
- Total Engagement Score on the Buying Group - sum of all member Campaign Responses values
- Scores update in real time when Campaign Member records are created, updated or deleted
- The Engagement Score Batch recalculates all scores from scratch using the rolling window - this fires automatically when Engagement Score Days is changed in Settings

Section 5 - Resetting Buying Groups

If you need to start fresh - for example after cleaning your data or changing your matching configuration - you can reset all Buying Groups and re-run the matching.

Important: The Reset Buying Groups action permanently deletes all Buying Group records and clears all Buying Group assignments from Accounts and Leads. This cannot be undone.

1. Navigate to the Buying Groups app
2. Click the Reset Buying Groups button
3. Choose whether to also delete Batch Log records
4. Confirm the reset
5. Wait for the reset to complete (monitor in Apex Jobs)
6. Run the Initial Sweep batch again to rebuild your Buying Groups

Section 6 - Support

For support, questions or feedback please contact Three Infinity:

Contact	Details
Email	threeinfinity575@gmail.com
Response Time	Within 2 business days
AppExchange	Leave a review or question on the AppExchange listing

Note: When contacting support, please include your Salesforce org ID, the version of Buying Groups installed, and a description of the issue including any error messages.