



Account Ranker

version 1.0, October 2020



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What's Included

Custom Fields

- Account_Ranker_Validator__c (checkbox) - Account
- Bypass_Rank__c (checkbox) – Account
- Previous_Rank__c (number 18,0) - Account
- Rank__c (number 18,0) – Account

Process Builders

- Account: Record Ranker

Flows

- Record Ranker – Account
- Account Ranker Validation

Validation Rules

- Account Ranker Validation



Installation and Setup

1. Download the app from the AppExchange
2. Select “Install for All Users”

☐ Install for Admins Only

☒ Install for All Users

☐ Install for Specific Profiles...

Install **Cancel**

3. Once installation is complete, the app can be seen in the Installed Packages list in Setup
4. Navigate to Setup and ensure the “Account: Record Ranker” process builder and “Record Ranker – Account” flow are inactive (we will activate these later).
5. Add the Rank field to Account list views and Account page layouts. Optionally, add the Previous Rank field to Account list views and Account page layouts.

	☐ Rank ↑	Previous Rank	Account Name
1	☐		Edge Communications
2	☐		Burlington Textiles Corp of America
3	☐		Pyramid Construction Inc.
4	☐		Dickenson plc
5	☐		Grand Hotels & Resorts Ltd



6. Either mass update Accounts with their appropriate Rank values or update them individually. **This must be done prior to moving on to step 7. Please leave Previous Rank blank.**
7. Once Accounts have been updated, repeat step 4 but this time ensure that the process builder and flow are active.



Use Case, How It Works & Limitations

Account Ranker functionality provides the ability to rank up to 450 accounts and to dynamically re-rank them when the rank value of a single record is updated. This functionality is designed to be used when users are updating rank values in a list view or directly on a record page.

The following limitations exist for this app:

- If more than 450 account records have a value in Rank__c, the Account Ranker Validation validation rule will block the record from being saved
- Only one record at a time should be updated. When working in a list view, re-ranking of records will not work correctly if multiple records are updated in a single edit
- Previous Rank field should not be updated manually and should not be updated in the same edit as a Rank update
- This app does not support mass import/update of rank values



Support & Customization

If you have any questions, run into any issues, or if you would like to work with StarrData on a custom version of this app, please contact us at:

sales@starrdata.com