



COUNTIF

COUNTIF DOCUMENTATION

User & Administrator Guide

Automatic U.S. County Population for Salesforce

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1. INTRODUCTION

Countif enhances Salesforce by automatically populating the **County** for any U.S. address. It is fully **plug-and-play** with **no setup required** for standard Salesforce objects.

Once installed:

- County fields populate automatically
- Freemium (100 lookups/month) activates instantly
- Admins do not need to configure anything or turn on flows

Countif works silently in the background, enriching your data with county details.

2. HOW COUNTIF WORKS (PLUG-AND-PLAY)

Countif listens for address changes across supported objects.

Whenever an address is created or updated:

1. Countif reads the ZIP/State (Basic) or full address (Premium)
2. Determines the correct county
3. Populates the appropriate County field

The system does not require:

- Setup
- Flow activation
- Custom logic
- Any Apex coding

The only optional step is adding the county fields to page layouts for visibility.

3. SUBSCRIPTION PLANS

Freemium (Default)

- Automatically activated after installation
- **100 county lookups per month**
- Free forever
- No credit card required
- Ideal for testing and small teams

Basic

- ZIP + State matching
- Unlimited lookups
- Uses Countif's internal ZIP-to-county metadata
- No external API calls
- Highly accurate for most ZIP codes

Premium

- Precise geolocation (latitude/longitude) using API
- Correct county even for ZIPs spanning multiple counties
- Ideal for compliance, healthcare, legal, and insurance

Activation for Basic or Premium is done through **Countif Management** → **Subscription**.

No setup or configuration is needed after subscribing.

4. INSTALLATION & GETTING STARTED

After installing Countif from the AppExchange:

- ✓ Freemium activates automatically
- ✓ Standard objects begin populating county fields
- ✓ No setup steps are required
- ✓ Flows and logic are already included inside the managed package

Admins may optionally add county fields to page layouts.

To upgrade plans, go to:

Countif Management → Subscription

5. SUPPORTED OBJECTS

Standard Objects (Work Automatically)

These objects work instantly with no enabling:

- **Account**
 - Billing County
 - Shipping County
- **Contact**
 - Mailing County
 - Other County
- **Lead**
 - Lead County
- **Contract**
 - Contract County

Objects That Must Be Enabled in Countif Management

- **Quotes**
- **Person Accounts**

When enabled, Countif automatically creates the required fields, mass-update flags, and flows.

6. MASS UPDATE (HISTORICAL RECORDS)

Countif updates county values when an address is **newly created or edited going forward**.

To update existing records, you can trigger a mass update by setting a special checkbox field to TRUE via Data Loader or Workbench.

There are two different field names:

For Standard Objects (Accounts, Contacts, Leads, Contracts)

Mass-update field:

Objectif__Update__County__c

(namespaced field)

Process:

1. Export IDs + Objectif__Update__County__c
2. Set the field to TRUE
3. Upload back via **Update**
4. Countif updates the county
5. The system automatically resets the checkbox back to FALSE

For Quotes & Person Accounts

Mass-update field:

Objectif__Update__County__c

*(single underscore after Objectif)
(non-namespaced “fake namespace”)*

Process:

1. Export IDs + Objectif_Update_County__c
2. Set the field to TRUE
3. Upload via **Update**
4. Countif updates counties
5. The flag automatically resets to FALSE

7. PAGE LAYOUT SETUP

Countif works even if the fields aren't on the page.

But if you want users to see the county fields:

1. Go to **Setup** → **Object Manager**
2. Select the object (Account, Contact, Lead, Contract, Quote, Person Account)
3. Edit the Page Layout
4. Drag the County fields onto the layout
5. Save

This is standard Salesforce behavior—not a setup requirement.

8. SAMPLE USE CASES

Healthcare

Eligibility, program boundaries, payer rules.

Government

Jurisdiction mapping, district boundaries, service routing.

Insurance & Legal

Court jurisdictions, coverage analysis, risk segmentation.

Real Estate

MLS boundaries, tax zones, geographic segmentation.

9. QUOTES SUPPORT (ENABLED FEATURE)

To support Quotes, enable the feature in:

Countif Management → Settings → Enable Quote Processing

When enabled, Countif automatically creates:

1. County fields on Quote

- Bill To County
- Ship To County

2. Mass-update field

- `Objectif_Update_County__c`

3. Flow for Quote

A Flow is installed that:

- Runs on Quote create/update
- Reads Bill To and Ship To address fields
- Populates the county fields
- Resets the update flag to FALSE

Admins may optionally add these fields to the Quote Page Layout.

10. PERSON ACCOUNTS SUPPORT (ENABLED FEATURE)

Enable via:

Countif Management → Settings → Enable Person Account Processing

When enabled, Countif automatically creates:

1. County fields

- Mailing County
- Other County

2. Mass-update field

- `Objectif_Update_County__c`

3. Flow for Person Accounts

Populates Mailing County and Other County on create/update and resets the flag automatically.

Admins may add the fields to the Person Account layout.