



# 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.

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## 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.

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# 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.

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## 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**

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## 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.

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## 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:

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### 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
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### 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
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## 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.

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## 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.

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## 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.

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# 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.