



Welcome to Rollup Magic!

Thank you for Installing our application!

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Post Installation Guide

Let's Get started with the Post Installation Configuration.

1. User Permission

After installing RollUp Magic, make sure to grant the appropriate user permission by assigning the “RUM User” Permission set to the respective User.

1. Go to "Setup."
2. Navigate to "Users."
3. Open your user.
4. Assign “RUM User” permission set to your user.

2. Activate Exception Alert Flow

To receive exception notifications, please activate the Exception Alert Flow by Following these steps:

1. Go to "Setup."
2. Navigate to "Flows."
3. Select "Exception Alert Flow."
4. Click on "Activate."

3. Generate DKIM Keys

To prevent emails from being sent to the spam folder, please create DKIM keys by following these steps and ask the IT team to whitelist the domain:

1. Navigate to Setup > DKIM Keys.
2. Create a DKIM Key.
3. Enter the Selector.
4. Enter the Alternate Selector.
5. Enter the Domain.
6. Set the Domain Match Pattern.
7. Click Save.



Post Uninstallation Guide

Let's Get started with the Post Uninstallation Configuration.

1. User Permission

After uninstallation of RollUp Magic, make sure to maintain proper user permission by removing the “RUM User” Permission set from all the respective Users.

2. Deletion of Dependent Triggers

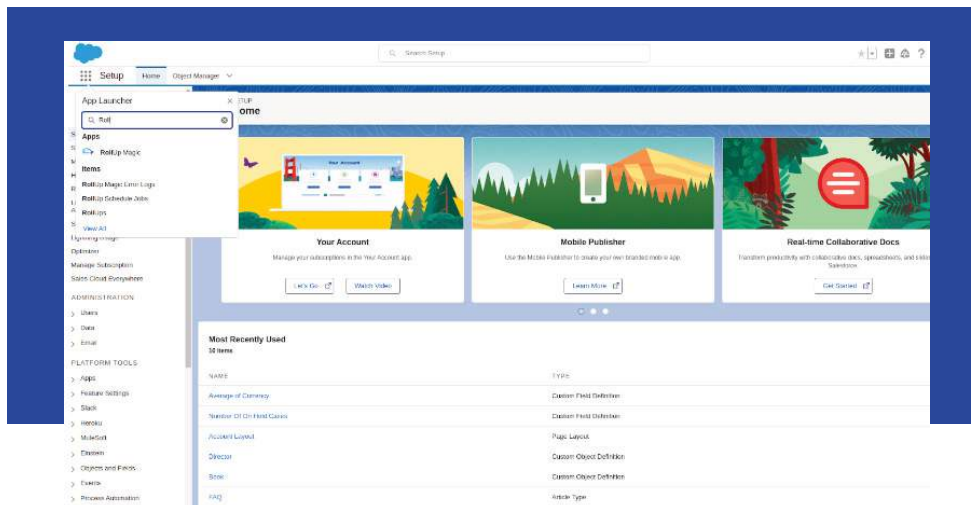
Before uninstalling RollUp Magic, ensure that all the triggers deployed by RollUp Magic, which start with the name "RUM," are deleted.

Features Guide

Unlock the potential of your creativity with RollUp Magic as we dive into its captivating features. Let's embark on this journey together!

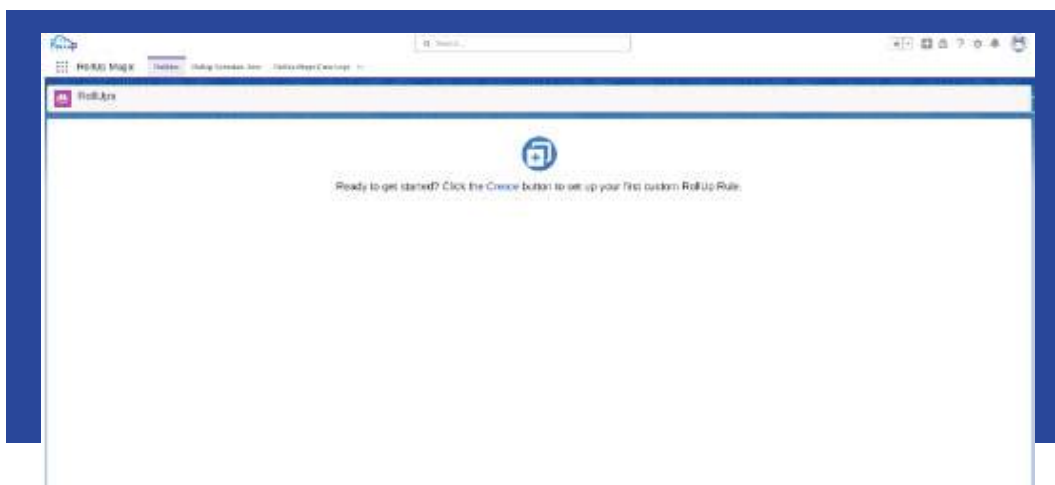
1. Launch Application:

In your Salesforce org, open the App Launcher and search for "RollUp Magic." Once found, click to open it.



2. Get Started:

Once you navigate to the RollUp Tab for the first time, you will land on the "Get Started" page. Here, you can create your first rollup field by clicking on the "Create" hyperlink or the plus icon.



3. Main Features of RollUp Magic:

3.1. Create a Rollup Record

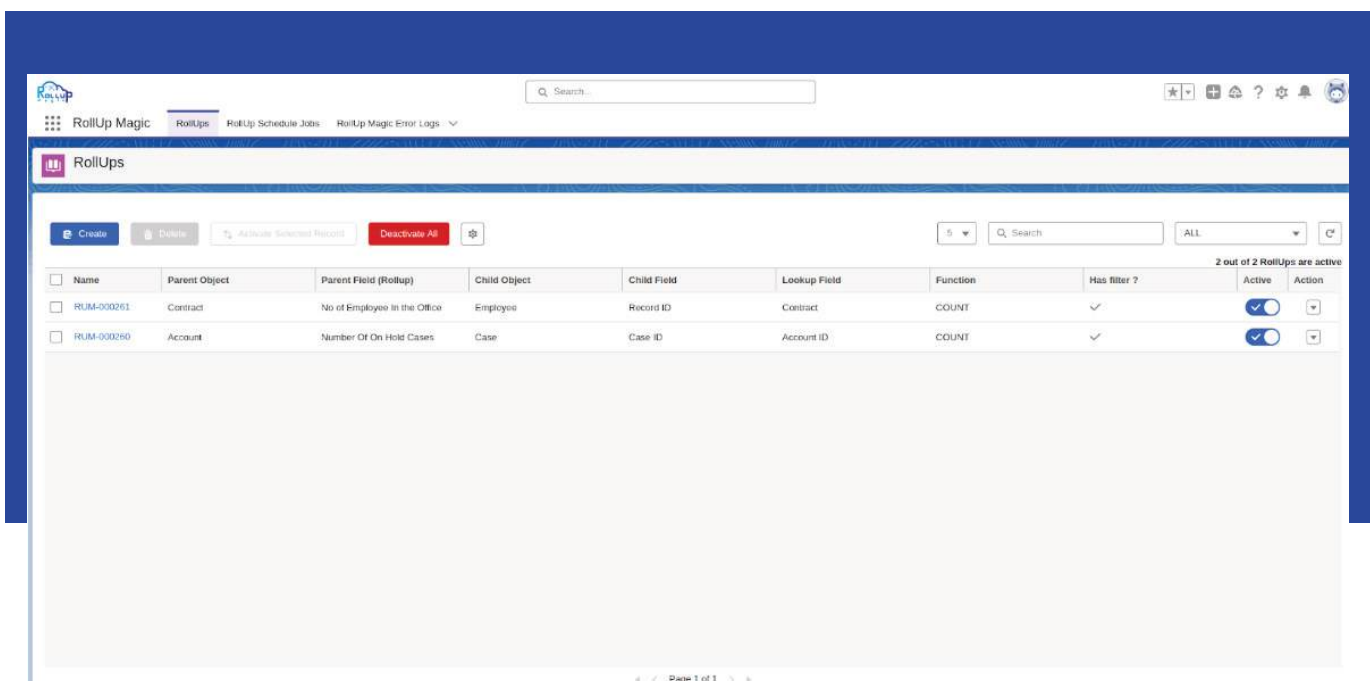
Use the intuitive Rollup Magic interface to create new rollups.

3.2. View Existing Rollups

Easily view, edit, run, delete, schedule, or activate/deactivate existing rollups.

3.3. Roll Up Schedule Jobs

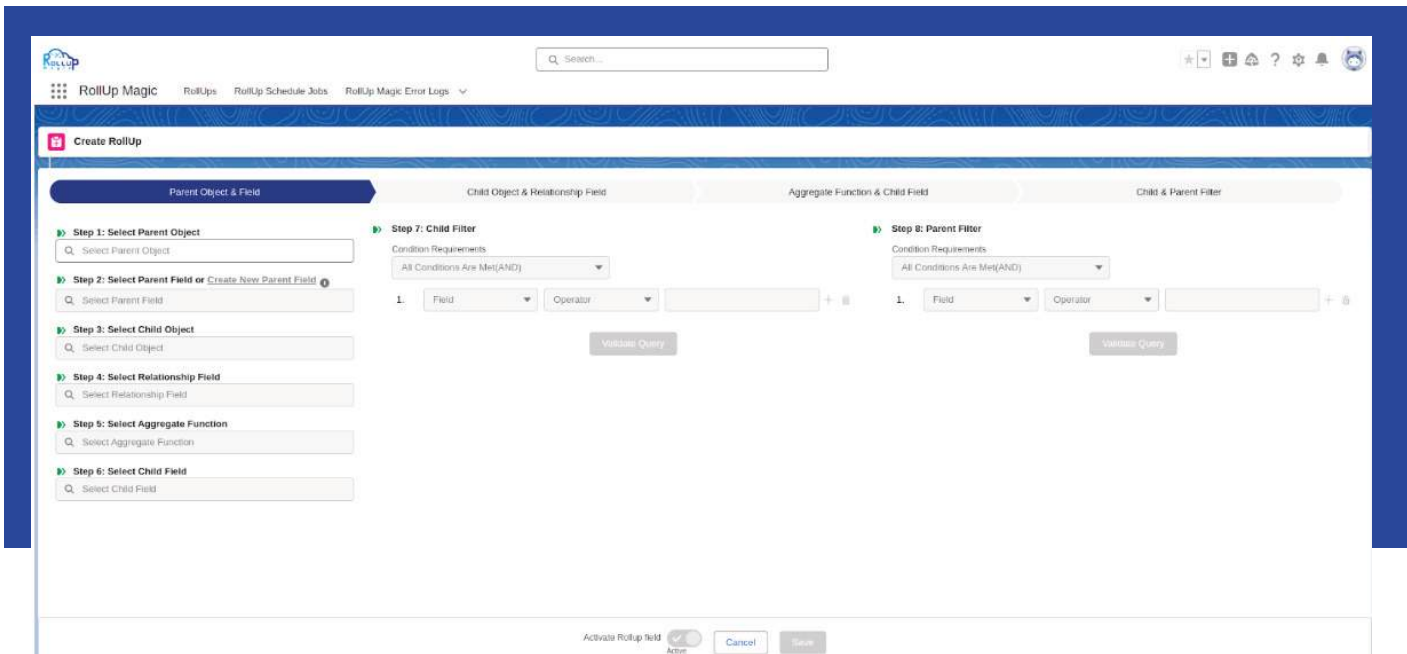
The scheduling of a rollup field process allows you to set specific times or intervals to run it, regardless of whether the rollup field is currently active or inactive.



The screenshot displays the RollUp Magic web application interface. At the top, there is a navigation bar with the RollUp Magic logo and a search bar. Below the navigation bar, the main content area is titled "RollUps". It features a table with columns: Name, Parent Object, Parent Field (Rollup), Child Object, Child Field, Lookup Field, Function, Has filter?, Active, and Action. Two rollups are listed: RUM-000261 and RUM-000260. Both are active, as indicated by the "Active" column showing a blue toggle switch. The "Action" column for each row contains a dropdown menu. At the bottom of the page, there is a footer indicating "Page 1 of 1".

Name	Parent Object	Parent Field (Rollup)	Child Object	Child Field	Lookup Field	Function	Has filter ?	Active	Action
RUM-000261	Contract	No of Employee in the Office	Employee	Record ID	Contract	COUNT	✓	✓	⌵
RUM-000260	Account	Number Of On Hold Cases	Case	Case ID	Account ID	COUNT	✓	✓	⌵

4. Main Features of RollUp Magic:



Note: Hover over a dropdown option to view its API name.

4.1 Select Parent Object and Field:

- First, select the parent object, and then choose a custom field from the "Select Parent Field" drop-down menu to use for the rollup calculation. Please note that our application supports only custom fields of specific data types (currency, date, dateTime, number, and percent) for this purpose.
- In the 'Select Parent Field' section, there are two sections available: the 'Available Parent Fields' section for selection as rollup fields, and the 'Already Used Fields' section, which is disabled by default. If no parent fields are available, an option will be displayed stating, 'No parent fields found. Kindly proceed to create them.'

Step 1: Select Parent Object

Account

Step 2: Select Parent Field or Create New Parent Field

Select Parent Field

Available Parent fields

Average of Currency
Number Of Opportunity

Already used fields

Number Of On Hold Cases

- If no fields are currently available on the parent object, proceed by creating a new custom field directly on the parent object.

Rollup Magic

Rollup Magic

Rollup Magic

Create New Rollup

Step 1: Select Parent Object

Account

Step 2: Select Parent Field or Create New Parent Field

Create New Parent Field

IMPORTANT

After field creation via Rollup Magic, you may need to configure Field Level Security settings and page layouts as the new field may not be automatically added. Making it crucial to include it where necessary.

*Data Type

NUMBER

*Field Label

Number Of On Hold Cases

*Field Name

NUMBER_OF_ON_HOLD_CASES

Description

COUNT OF ON HOLD CASES

*Length

18

*Default Value

0

Cancel

Save

NOTE: Once the rollup field creation process completes, the field will be generated. In case of errors, review the error messages and activate the respective rollup for better user experience.

4.2 Select Child Object and Relationship Field:

- Define the child object and its relationship field for the rollup.

Step 3: Select Child Object

Opportunity

Step 4: Select Relationship Field

Account ID

4.3 Choose Aggregate Function and Child Field

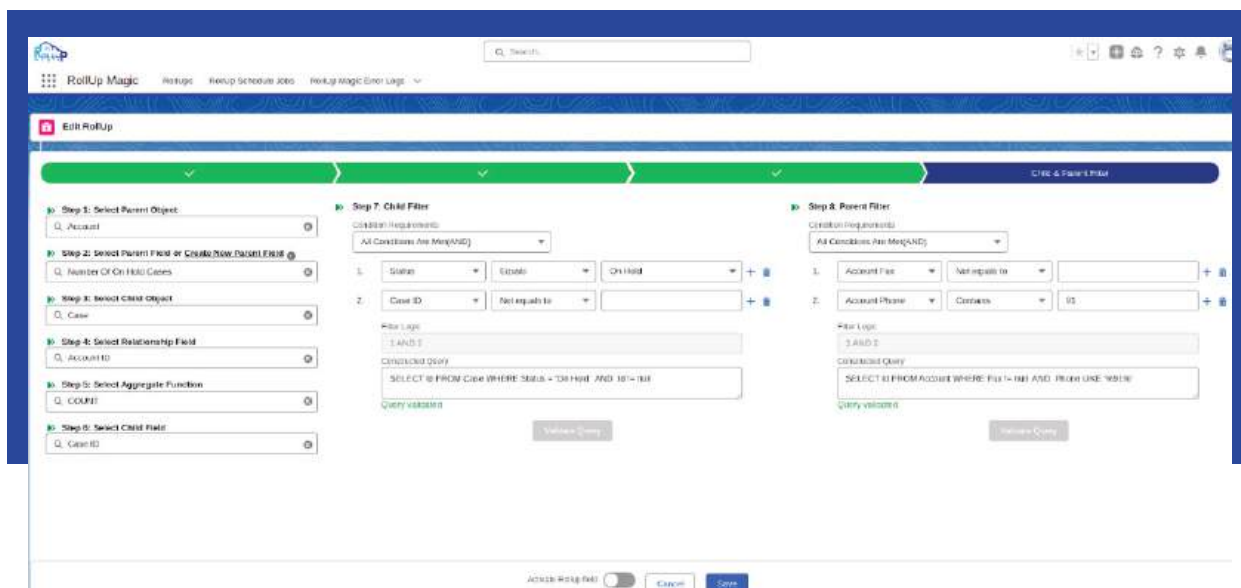
- The list of aggregate functions and child fields depends on the data type of the selected parent field.
- Select the aggregate function and child field for the rollup.

Step 5: Select Aggregate Function

Step 6: Select Child Field

4.4 Set Child and Parent Filters:

- Description:** Additionally, you can define filters for the child and parent objects to exclude specific records from consideration in the rollup field. Users can specify a field, its operator, and a value to filter out records that meet the business logic criteria.



The screenshot displays the 'Edit Rollup' configuration page in the Rollup Magic application. The interface is divided into several sections for configuring the rollup field:

- Step 1: Select Parent Object:** A dropdown menu showing 'Account'.
- Step 2: Select Parent Field or Create New Dimension:** A dropdown menu showing 'Number Of On Hold Cases'.
- Step 3: Select Child Object:** A dropdown menu showing 'Case'.
- Step 4: Select Relationship Field:** A dropdown menu showing 'ACCOUNT ID'.
- Step 5: Select Aggregate Function:** A dropdown menu showing 'COUNT'.
- Step 6: Select Child Field:** A dropdown menu showing 'Case ID'.
- Step 7: Child Filter:** A section for defining filters on the child object. It includes a 'Condition Requirements' dropdown set to 'All Conditions Are Met (AND)', a list of conditions (e.g., 'Status' is 'Closed', 'On Hold'), a 'Filter Logic' section with 'AND' selected, and a 'Conditional Query' text area containing the query: 'SELECT * FROM Case WHERE Status = 'Closed' AND 'On Hold''. Below this is a 'Query Validation' button.
- Step 8: Parent Filter:** A section for defining filters on the parent object. It includes a 'Condition Requirements' dropdown set to 'All Conditions Are Met (AND)', a list of conditions (e.g., 'Account Type' is 'Not equal to', 'Account Phone' contains '05'), a 'Filter Logic' section with 'AND' selected, and a 'Conditional Query' text area containing the query: 'SELECT * FROM Account WHERE Pfx != null AND FROM USE WEB'. Below this is a 'Query Validation' button.

At the bottom of the page, there is a 'Rollup Magic' logo, a 'Rollup Magic Error Log' link, and a 'Rollup Magic' button.

- Select The Conditional Requirement

All Conditions are Met

- Example: Condition 1 AND Condition 2
- Logic: Uses the AND operator between conditions.

Any Conditions are Met

- Example: Condition 1 OR Condition 2
- Logic: Uses the OR operator between conditions.

Custom Conditions are Met

- Example: (Condition 1 AND Condition 2) OR Condition 3
- Logic: Custom logic allows for the selection of desired records for rollup. Users can combine AND/OR operators with parenthesis to group conditions effectively.

Step 7: Child Filter

Condition Requirements

All Conditions Are Met(AND)

1.

Amount

Greater than

50,000.000



Validate Query

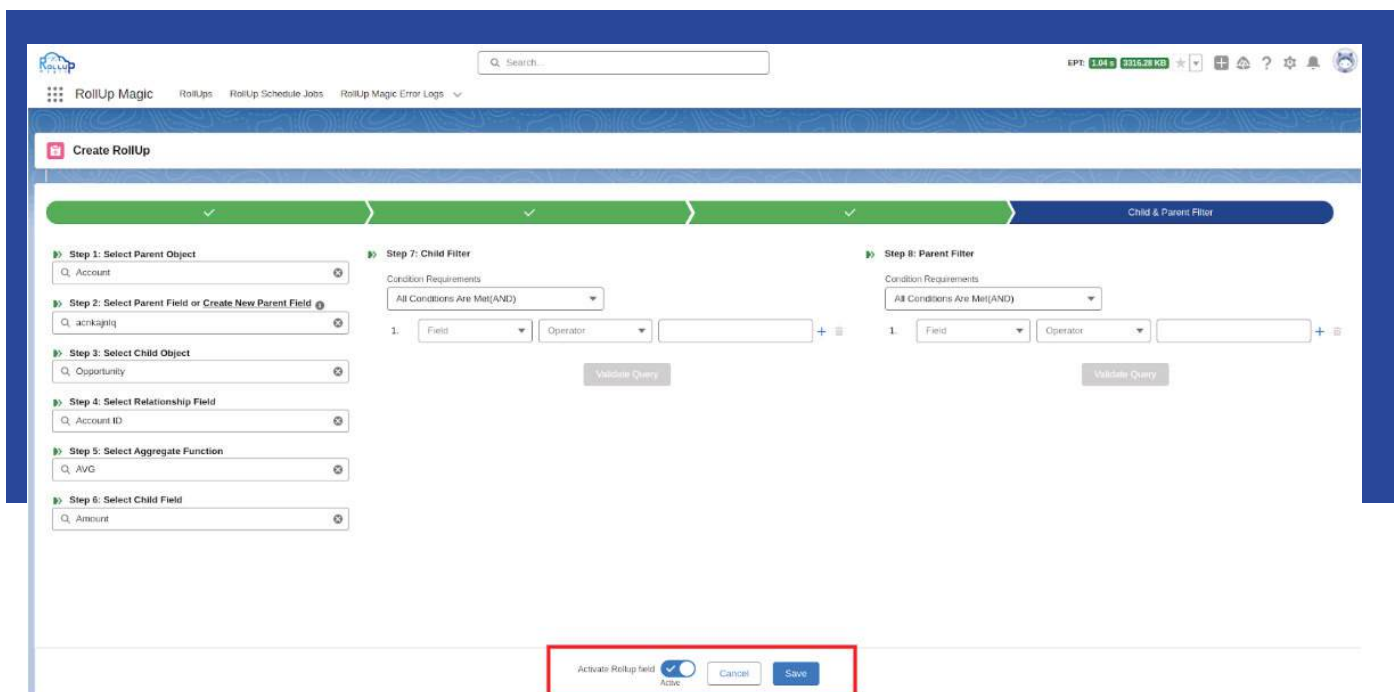
4.5 Validate Query:

- The "Validate Query" button validates your filters (both parent and child filters) to ensure that the rollup field is error-free.

Note : The "Validate Query" button will be enabled only when all filter parameters are filled. If you choose not to apply any filters, you can proceed further. Also the "Save" button will only become enabled when both child and parent filter conditions are validated with no errors, or when no filter is applied

4.6 Activate Roll Up and Save:

- Rollups are “Activated” by default, but you can choose to deactivate them if needed and save your settings.

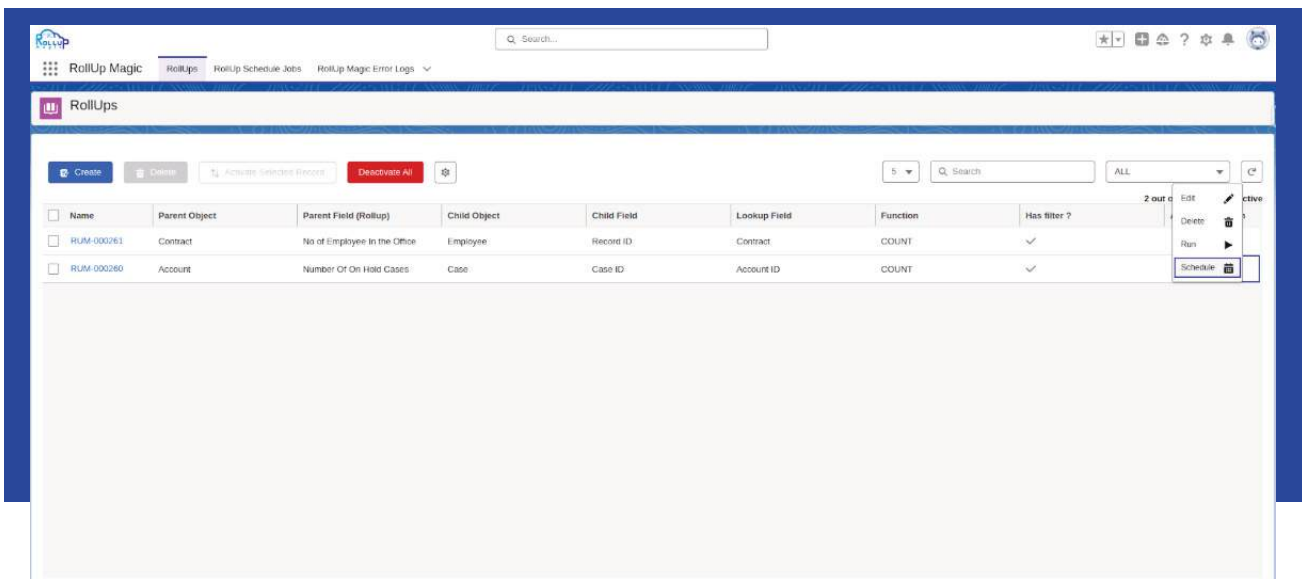


The screenshot displays the 'Create RollUp' interface in the RollUp Magic application. The interface includes a search bar at the top right and a navigation menu on the left. The main content area shows a progress bar with four steps: Step 1 (Select Parent Object), Step 2 (Select Parent Field or Create New Parent Field), Step 3 (Select Child Object), and Step 4 (Select Relationship Field). The 'Child & Parent Filter' section is active, showing 'Step 7: Child Filter' and 'Step 8: Parent Filter'. At the bottom, there is a red-bordered box containing the 'Activate Rollup field' toggle, which is currently turned on (Active), and 'Cancel' and 'Save' buttons.

After saving, the RollUp field will be listed in the Rollup tab's data table for easy access.

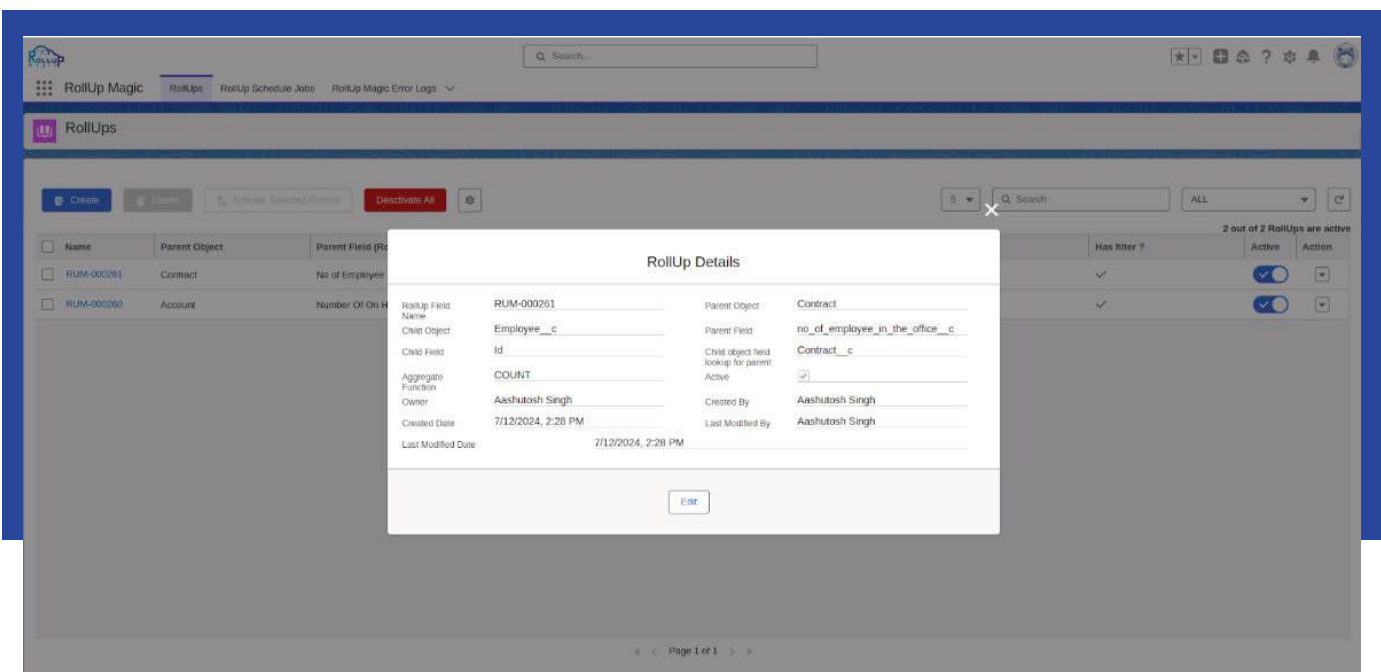
5 . RollUp Action Buttons:

Each RollUp offers 5 action buttons in the dropdown menu



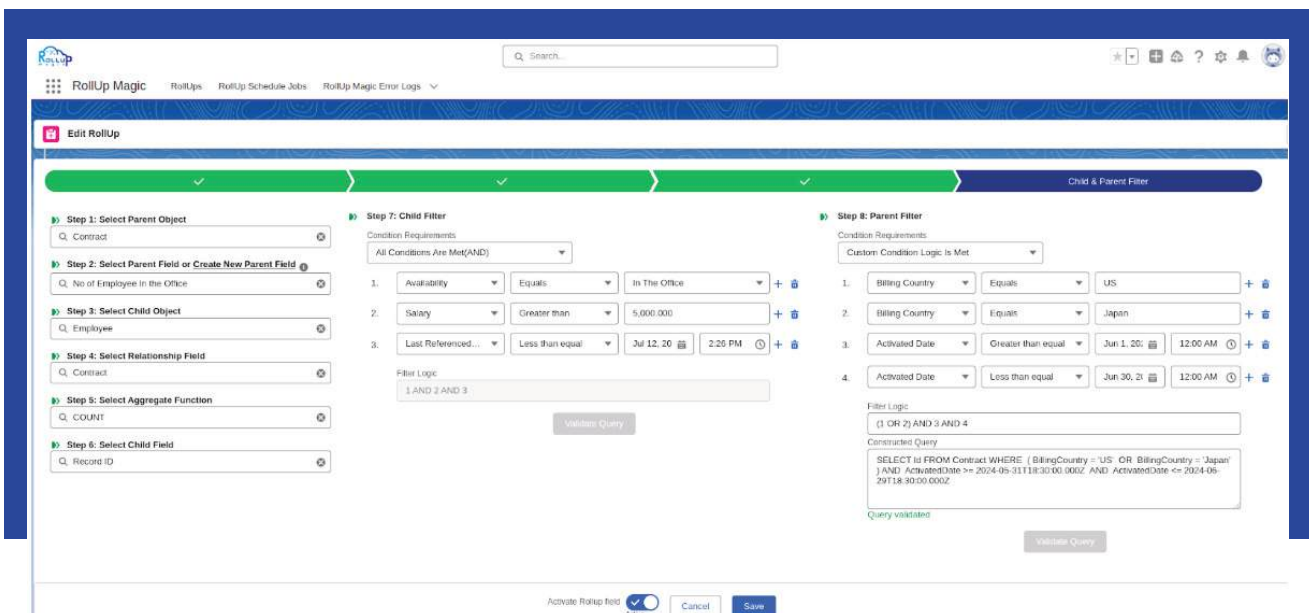
5.1 View:

When the user clicks on the “Name” in the RollUp data table, the RollUp detail page will open.

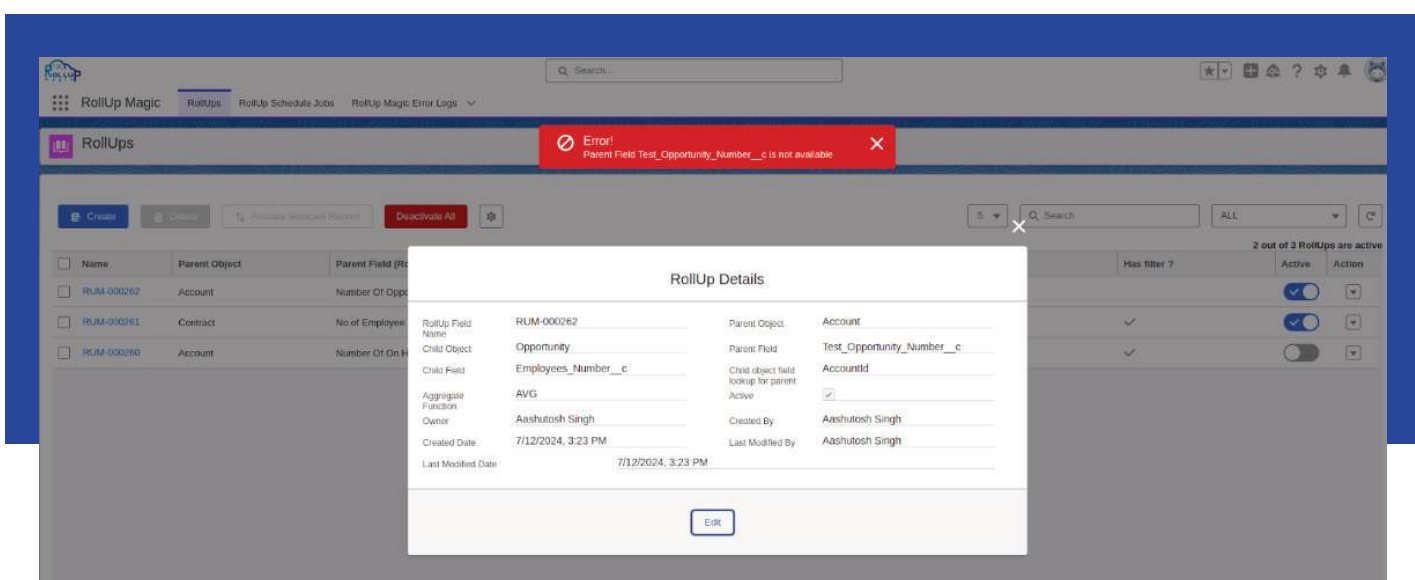


5.2 Edit:

Adjust and customize rollup fields along with their respective filters.

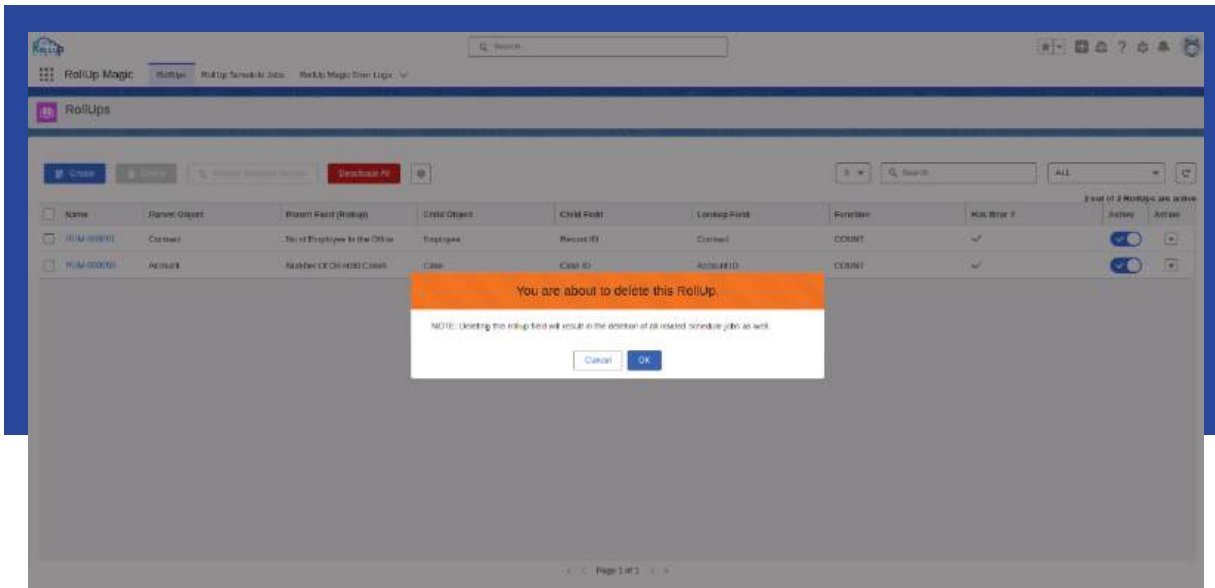


Note: A RollUp can only be edited if its field exists in the object. If you delete the field, you will no longer be able to access the RollUp record.



5.3 Delete:

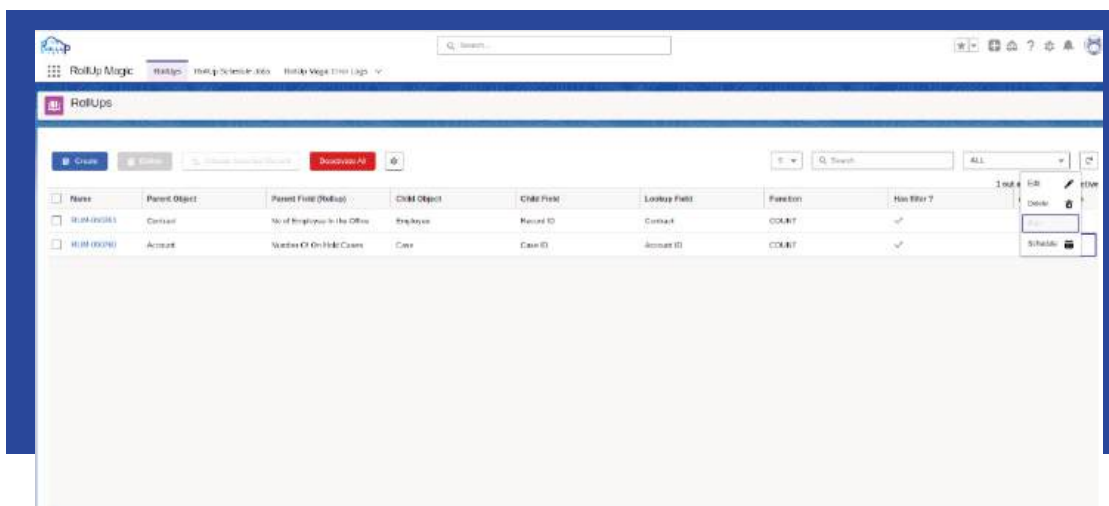
Removing the rollup field results in the deletion of any applied filters on the rollup field and any scheduled jobs associated with it. This ensures that all related configurations and processes are completely cleared.

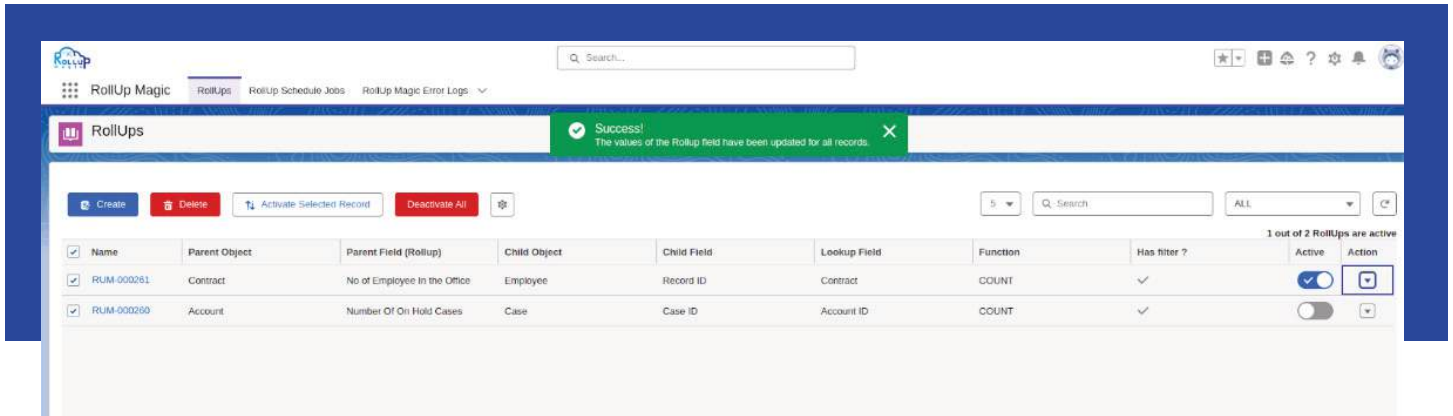


5.4 Run:

Manually trigger the rollup process for immediate execution, updating the selected rollup field for all records promptly.

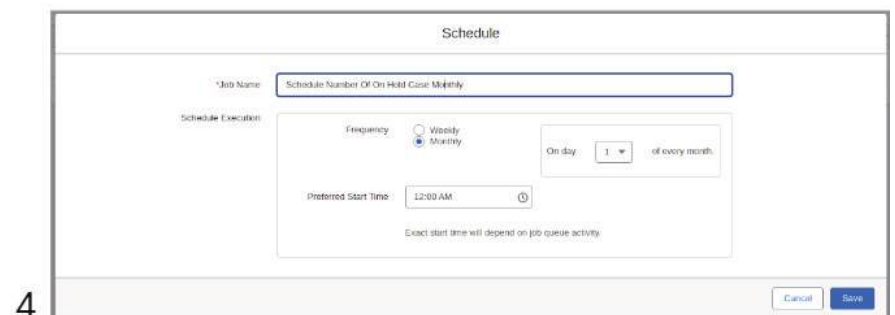
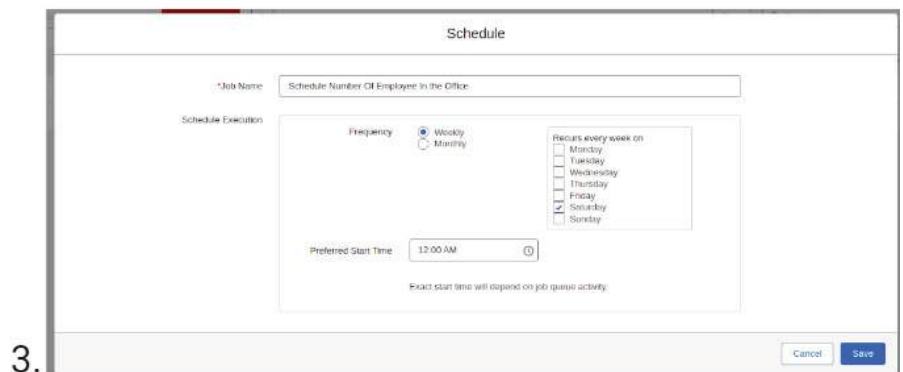
Note: The “Run” action will work only with the active Rollup fields.





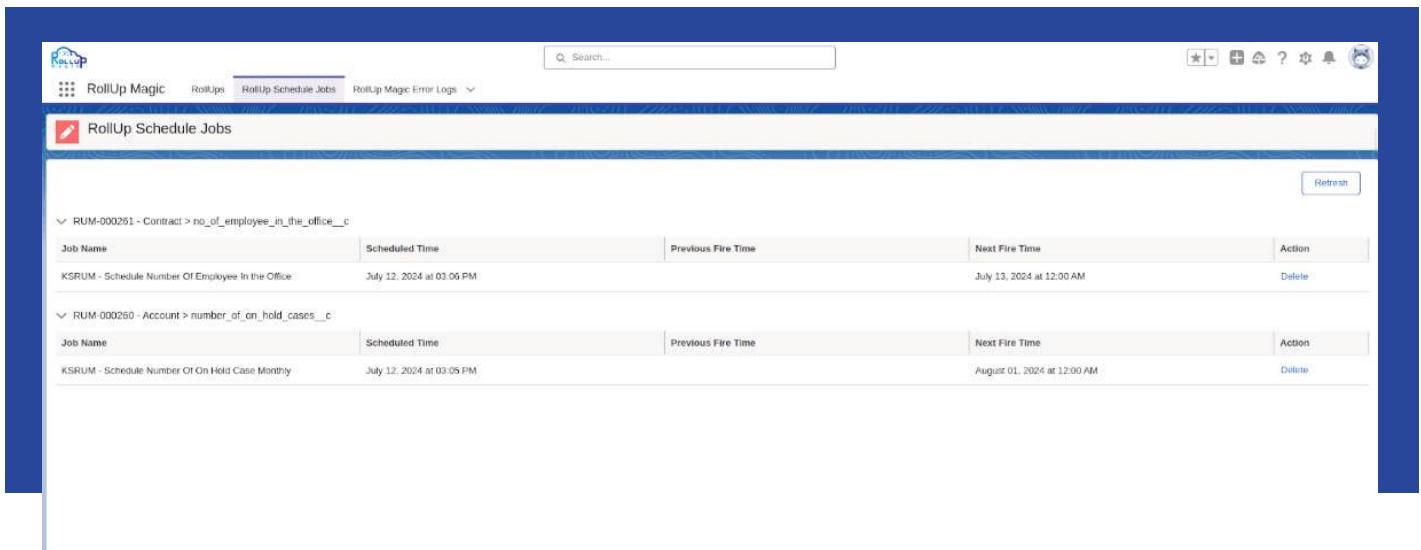
5.5 Schedule:

Automate the rollup execution by scheduling jobs at specific intervals. You can choose to run the rollup process on a weekly or monthly basis. If you prefer daily execution, simply select all the days of the week in the scheduling options.



6. Layout of Schedule Roll Up Jobs:

- The RollUp jobs are listed in the RollUp Scheduled Job tab for easy management and monitoring.



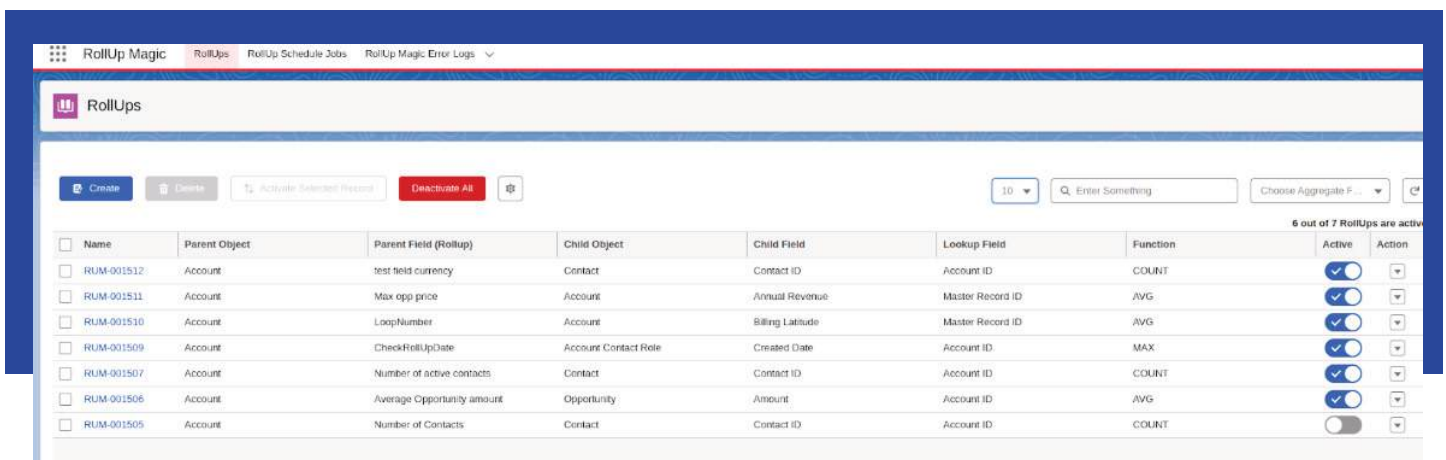
The screenshot shows the 'RollUp Schedule Jobs' tab in the RollUp Magic application. It displays two expandable sections for different RollUp jobs. Each section contains a table with columns for Job Name, Scheduled Time, Previous Fire Time, Next Fire Time, and Action.

Job Name	Scheduled Time	Previous Fire Time	Next Fire Time	Action
RUM-000291 - Contract > no_of_employee_in_the_office__c				
KSRUM - Schedule Number Of Employee In the Office	July 12, 2024 at 03:05 PM		July 13, 2024 at 12:00 AM	Delete
RUM-000290 - Account > number_of_on_hold_cases__c				
KSRUM - Schedule Number Of On Hold Case Monthly	July 12, 2024 at 03:05 PM		August 01, 2024 at 12:00 AM	Delete

7. Deactivate All RollUp Records:

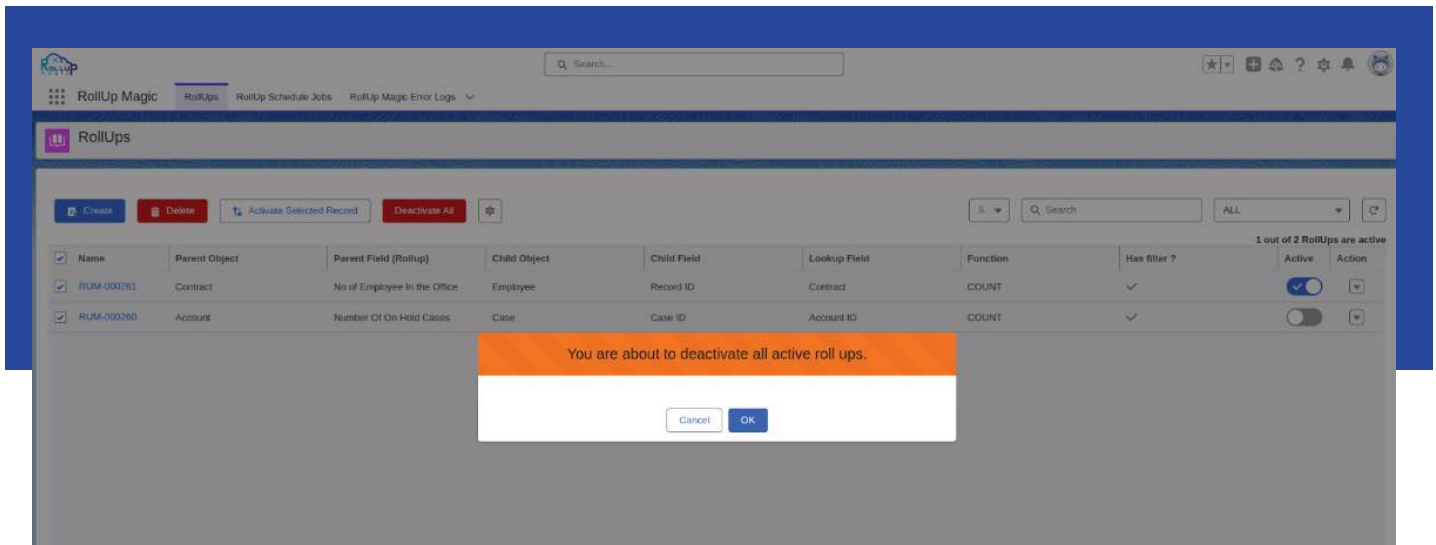
- Utilize the “Deactivate All” feature for mass deactivation multiple RollUps at once.

Note: This button becomes enabled when any of the RollUps are activated



The screenshot shows the 'RollUps' tab in the RollUp Magic application. It displays a table of RollUp records with columns for Name, Parent Object, Parent Field (Rollup), Child Object, Child Field, Lookup Field, Function, Active, and Action. The 'Deactivate All' button is visible at the top of the table.

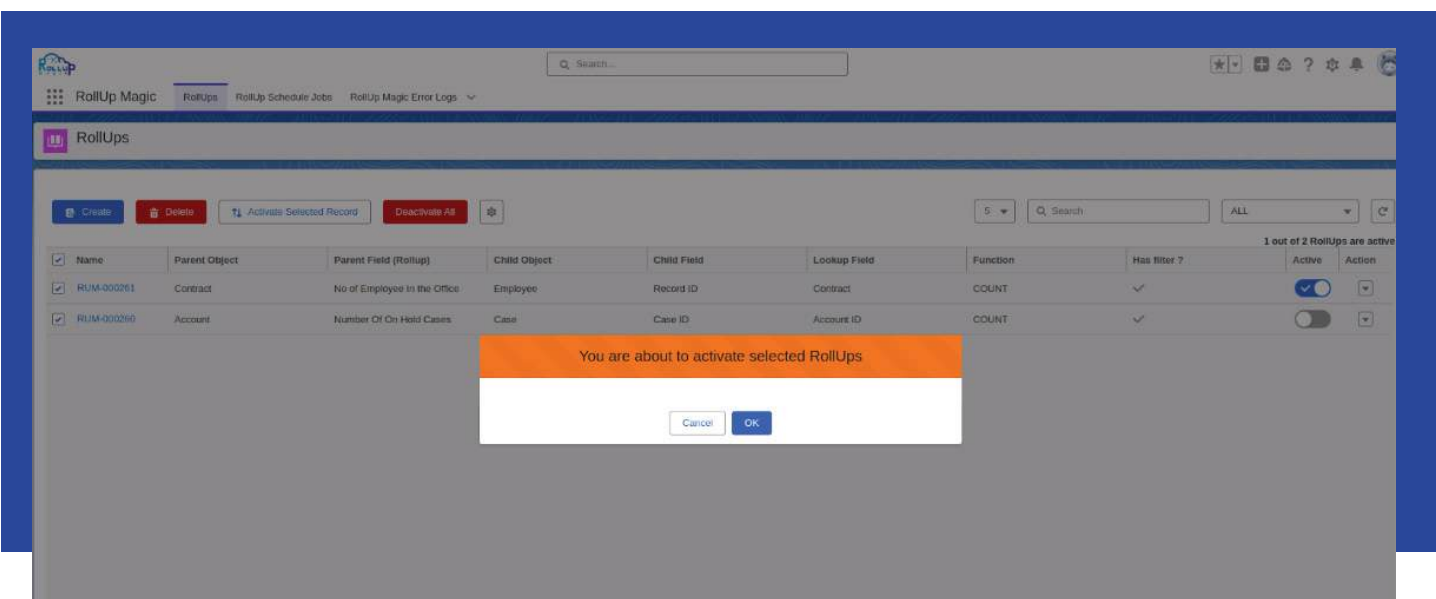
Name	Parent Object	Parent Field (Rollup)	Child Object	Child Field	Lookup Field	Function	Active	Action
RUM-001512	Account	test field currency	Contact	Contact ID	Account ID	COUNT	☒	
RUM-001511	Account	Max opp price	Account	Annual Revenue	Master Record ID	AVG	☒	
RUM-001510	Account	LoopNumber	Account	Billing Latitude	Master Record ID	AVG	☒	
RUM-001509	Account	CheckRollUpDate	Account Contact Role	Created Date	Account ID	MAX	☒	
RUM-001507	Account	Number of active contacts	Contact	Contact ID	Account ID	COUNT	☒	
RUM-001506	Account	Average Opportunity amount	Opportunity	Amount	Account ID	AVG	☒	
RUM-001505	Account	Number of Contacts	Contact	Contact ID	Account ID	COUNT	☐	



8. Activate Selected RollUp Records:

- Select and Activate mass rollups for efficient management and control.

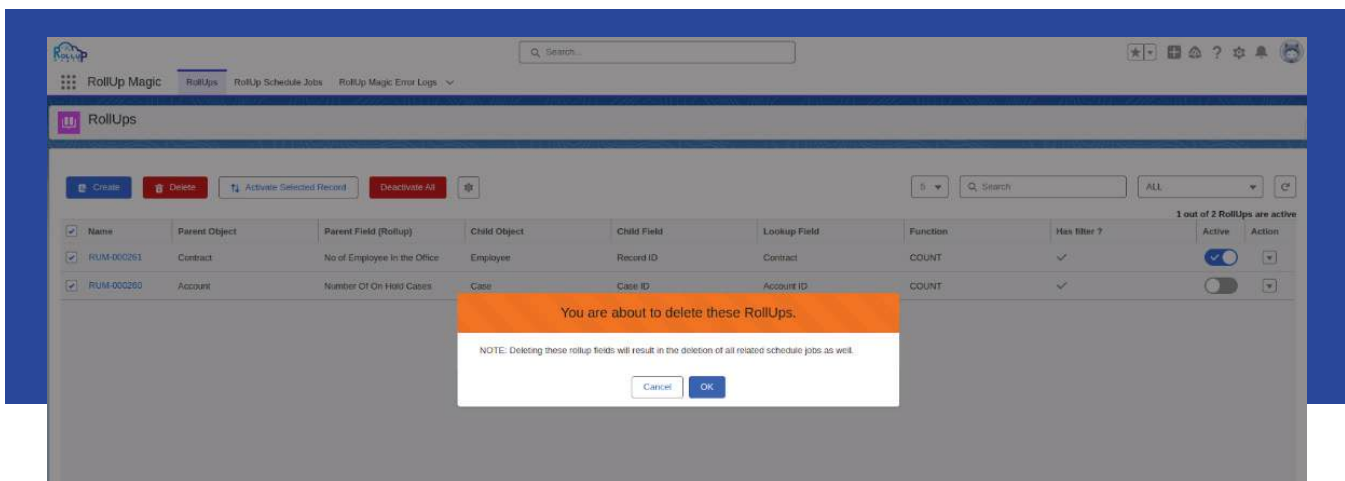
Note: The "Activate Selected Record" button is enabled when inactive RollUps are selected.



9. Delete RollUp Records:

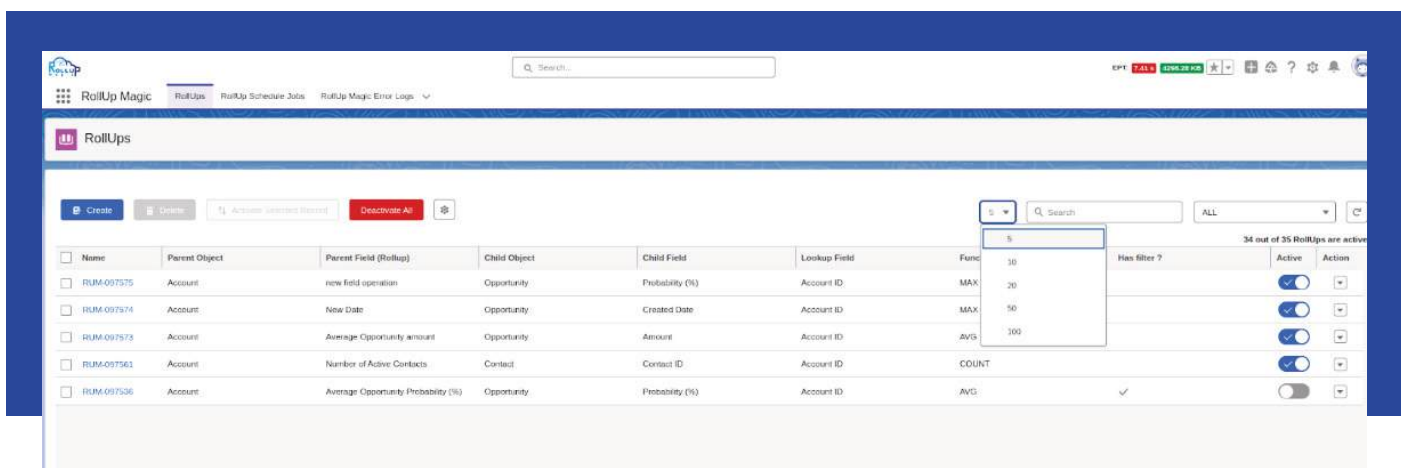
When performing mass deletion of rollup fields, all associated filters and scheduled jobs tied to these fields will also be removed. This ensures complete clearance of all related configurations and processes.

Note : The “Delete Record” button should be enabled when Rollups are selected.



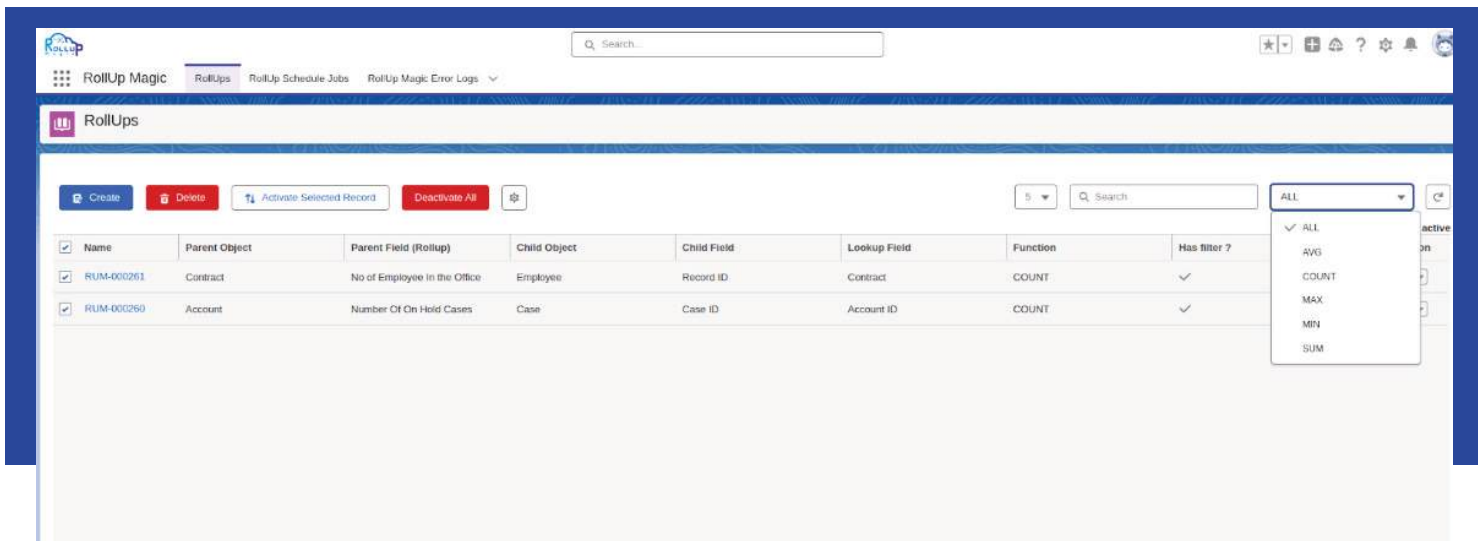
10. Manage Displayed Rows Using Selection Controls:

- Adjust the number of visible rows in the table by selecting from the options provided in the selection controls.
- Customize the display to align with your preferences for an optimal viewing experience.



11. Filter By Function:

- Easily access and filter RollUps using the convenient function from the dropdown menu.
- Available functions include: AVG, COUNT, MAX, MIN, and SUM

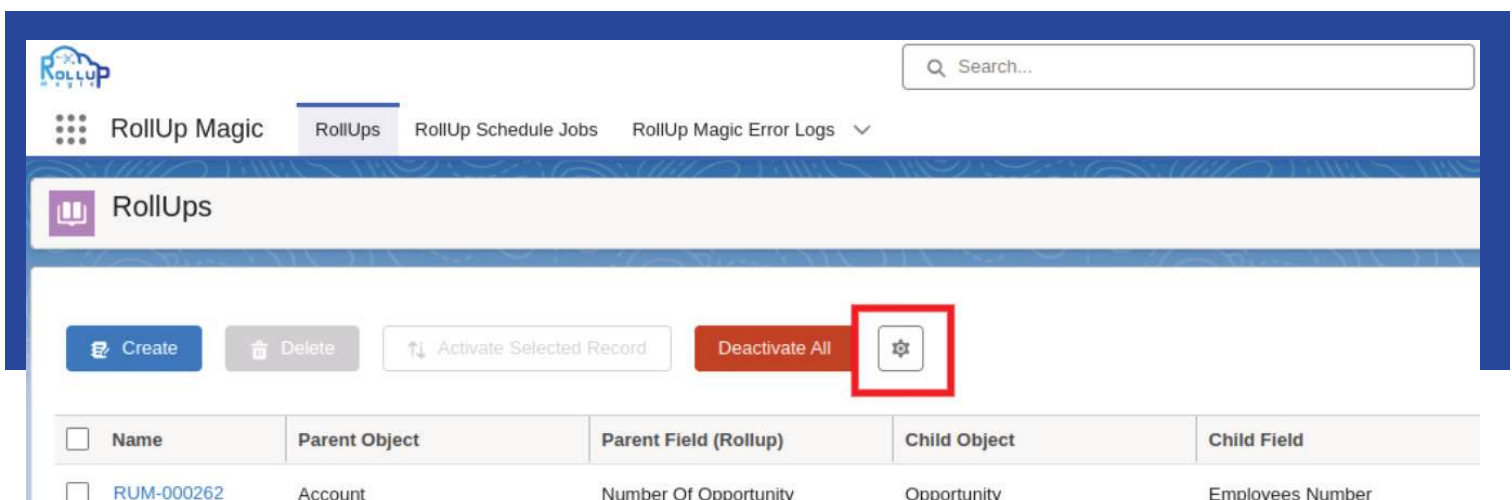


The screenshot shows the RollUp Magic interface with the 'RollUps' tab selected. A dropdown menu is open, displaying the following options: ALL, AVG, COUNT, MAX, MIN, and SUM. The table below shows two records with their respective functions.

Name	Parent Object	Parent Field (Rollup)	Child Object	Child Field	Lookup Field	Function	Has filter ?
RUM-000261	Contract	No of Employee in the Office	Employee	Record ID	Contract	COUNT	✓
RUM-000260	Account	Number Of On Hold Cases	Case	Case ID	Account ID	COUNT	✓

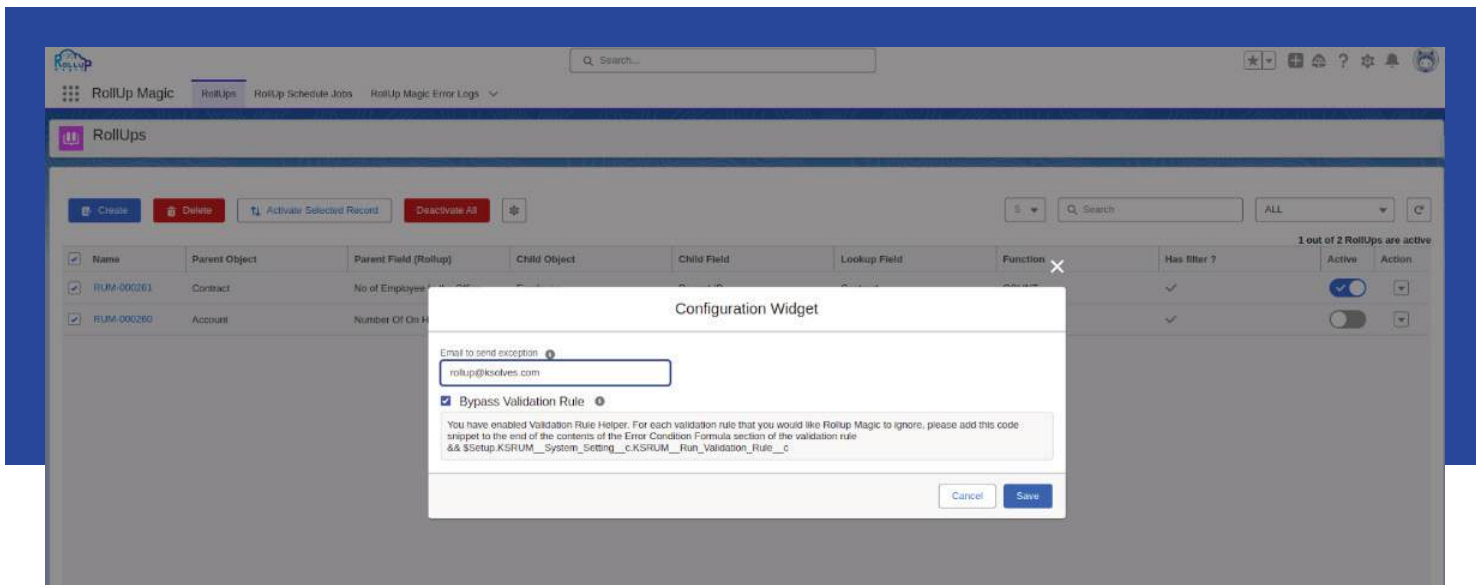
12. Configuration Widget Layout:

- **Gear Icon:** Click to access the Configuration Widget Layout.

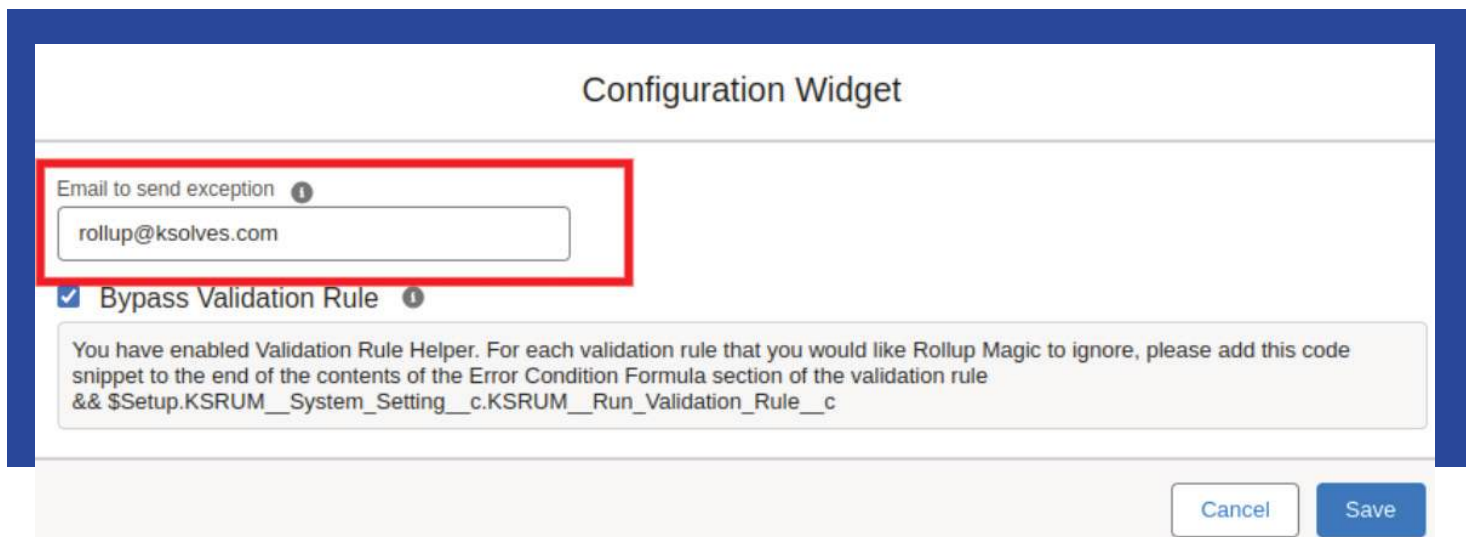


The screenshot shows the RollUp Magic interface with the 'RollUps' tab selected. A red box highlights the gear icon (configuration icon) in the top right corner of the widget area. The table below shows one record with its configuration details.

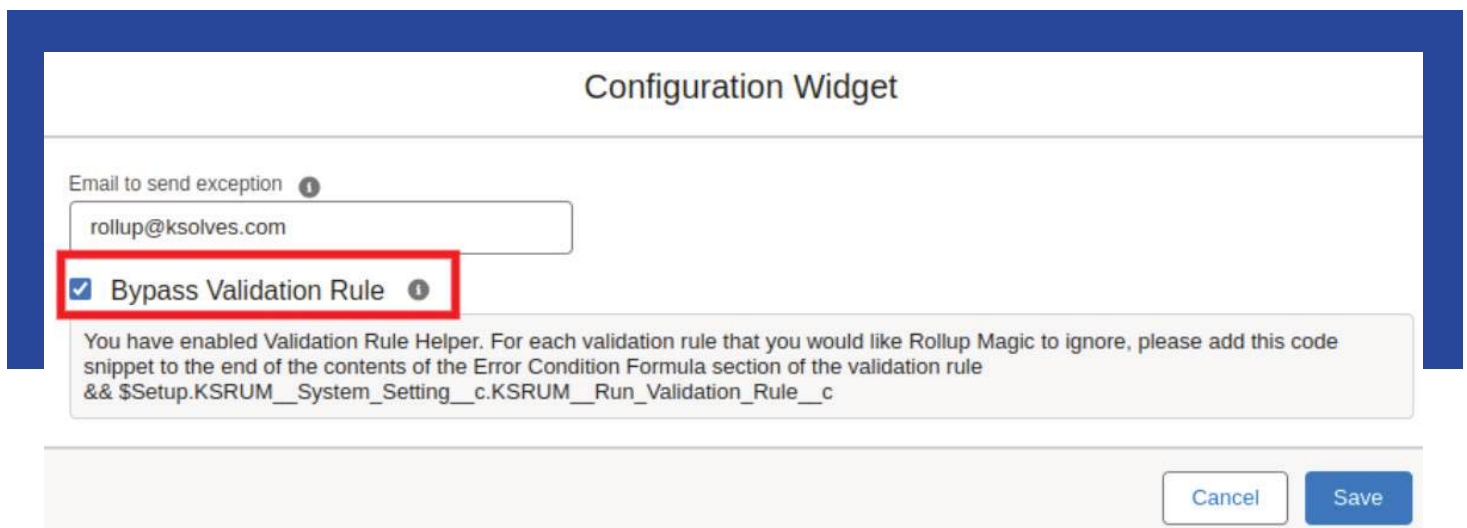
Name	Parent Object	Parent Field (Rollup)	Child Object	Child Field
RUM-000262	Account	Number Of Opportunity	Opportunity	Employees Number



- **Exception Mail Recipient:** Recipient will receive the exception's notifications via email for quick issue resolution.



- **ByPass Validation Rule:** Exclude validation checks during inserts or updates for smoother operations. You can bypass validation rules by checking the 'Bypass Validation Rule' checkbox. When you check this checkbox, you'll see a code snippet. To bypass the validation rule, copy this code snippet and paste it into your custom validation



The screenshot shows a 'Configuration Widget' with a text input field for 'Email to send exception' containing 'rollup@ksolves.com'. Below it, the checkbox 'Bypass Validation Rule' is checked and highlighted with a red box. A code snippet is displayed below the checkbox: '&& \$Setup.KSRUM__System_Setting__c.KSRUM__Run_Validation_Rule__c'. At the bottom right are 'Cancel' and 'Save' buttons.

Steps To Bypass validation rules

- Go to Setup.
- Under Object Manager, select the object with your validation rule.
- Click Validation Rules in the sidebar.
- Find your rule and click its name.
- Click Edit.
- Paste your code snippet.
- Click Save.

Conclusion

RollUp Magic is your go-to solution for managing rollup records in Salesforce. From user permissions setup to creating your very first rollup record, this guide has got you covered every step of the way. The key feature of RollUp Magic is its ability to simplify the creation, viewing, and scheduling of rollups, ensuring you get the job done efficiently and accurately.

And that's not all—with handy action buttons for editing, deleting, running, and scheduling jobs for each rollup, it gives amazing flexibility to the users. The layout for scheduling rollup jobs is designed for easy management and monitoring, while the “Deactivate All” feature makes mass deactivation possible with just one click. Plus, you can activate or deactivate individual records that provide you with granular control.

Filtering by function and accessing the configuration widget layout is straightforward with RollUp Magic. And by bypassing validation rules and managing exceptions effectively, you'll keep your operations running smoothly and resolve issues in a flash.

In a nutshell, this guide is your ticket to mastering RollUp Magic and unleashing the full potential of your rollup records. Get started today to start maximizing the power of your rollup records with RollUp Magic!

