

Rollup Helper Release Notes v22.7

RH22.7

New Functionality:

- Added the ability to disable force async per rollup. The config option is available on the rollup edit page and will force the rollup to run in real-time even if Force Async is enabled for the source object.
- Added the ability to configure a unique sum rollup. A separate field may be selected to enforce unique values.
- Added the ability to calculate a rollup from a target record's detail page via a Lightning Web Component: c:ps_calculateRollupAction. **This is only available in Premium Edition.**
- Added the ability to track field history on rollups via the PS_Filter_Audit__c and PS_Filter_Audit_History__c objects.

Usability Improvements:

- Added the ability to clone parent filters from the define filter, run, and schedule rollup pages.
- Adjusted the DLRS health check warning to only display if there are active DLRS settings rolling up to the same target field as an active rollup.
- Added a warning banner to the All Rollups and Health Check pages to remind users to set the 'Rollup Helper - All Access' permission set to their user if it is not assigned.
- Implemented Lightning Web Components for the Convert Rollups page. Also added an option to convert multiple settings at once time.
- Added an option to delete exceptions by object in the View Exceptions page.
- Schedules set to run once a week, month, and year can now be set to run at a fixed time instead of on a frequency basis.
- Added the ability to export rollups by rollup group from the export page.
- The sort field and page number preferences from the All Rollups page are now saved across different tabs.
- Updated Rollup Helper to use API 63.0.
- Added the ability to set a text truncated option when target fields hit the field size limit. Options include "et al.", "...", ", etc.", and "others."
- Added references to rollup schedules when clicking "Where is this filter used?" on the define filter page.
- Added search functionality to the filter management and export pages.
- Implemented Lightning Web Components for the Rollup Queue page. Also added the ability to select multiple queue items to delete or retry.
- Implemented Lightning Web Components for the Getting Started and Help pages.
- Added a parent filter preview to the run and schedule pages when a parent filter is set.
- Added the ability to set object specific record scope from the Health Check page.
- Added the ability to search by Id when selecting target records to preview rollup results.
- Added a health check for filters that have missing data.

- Added navigation to Enable Realtime page to the All Rollups page and Deploy Object trigger pages.
- Added an error info icon next to rollups that were deactivated by the exception monitor to improve visibility for potential issues.
- Added search functionality to the schedule management page.
- Adjusted the field usage search to only look for fields in a filter.
- Implemented Lightning Web Components for manually running a rollup. A modal will display when clicking Run for a rollup instead of navigating to a new page.
- Added a parent column to the schedule management page.
- Added the ability to export rollups from the All Rollups page.
- Added the ability to ignore healthcheck warnings about having active DLRS settings.

Bug Fixes

- Resolved an issue where the retry rollups job would not attempt to rollup to all records if multiple IDs were listed in the exception record.
- Resolved an issue where configuring a new rollup target field would encounter an error when the amount of permission sets was over 1000.
- Resolved an issue where importing filters would cause the entire import to fail if there were malformed HS_Filter__c records in the org.
- Resolved an issue where configuring a rollup with a polymorphic source field would sometimes encounter a “Could not find object in global describe” error.
- Resolved an issue where deleting exceptions by date would not work correctly due to timezone differences.
- Resolved an issue where rollups with parent filters targeting the Task object would encounter an error when run in real time.
- Resolved an issue where viewing a rollup or filter would cause a null reference error if filters in the org had malformed data.
- Resolved an issue where exporting rollups in Firefox would sometimes not work.
- Resolved an issue where changing the case for a source field would not trigger a TXT rollup update.
- Resolved an issue where rollups would not get correctly mapped to filters on import when there were many records to import. This issue was usually reproducible after a sandbox refresh.
- Resolved an index out of bound error when running foreign key rollups.
- Resolved an issue where SOQL 101 error would occur when running many foreign key rollups in real time.
- Resolved an issue where selecting a child object during rollup configuration would cause an infinite loading spinner.
- Resolved an issue where editing filter names inline on the Filter Management page would sometimes cause an error.
- Removed permission set groups from the list of possible permission sets when creating a field.
- Resolved an “INVALID_TYPE_ON_FIELD_IN_RECORD” error when trying to save custom rollup settings.
- Resolved an issue where a parent filter would incorrectly populate when viewing a rollup schedule that does not have a parent filter set.
- Resolved an internal service error when trying to perform an inline edit on the all rollups page.

- Resolved an issue where the permission set warning would briefly appear when the export rollup page was loading.
- Resolved an issue where malformed filter records would prevent the filter management page from loading. Added an error info icon next to filters that have incomplete data.
- Resolved an issue where basic polymorphic filter criteria would cause rollups to get deactivated by the exception monitor.
- Resolved an issue where third party triggers starting with 'PS_' would not allow custom trigger deployment.
- Resolved an issue where preview rollups would not work for ContactHistory source objects.
- Resolved an issue where rollups would occasionally overwrite values with incorrect values due to insufficient query rows available. Exceptions are now logged when a rollup is running and not enough query rows are available.