



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.

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

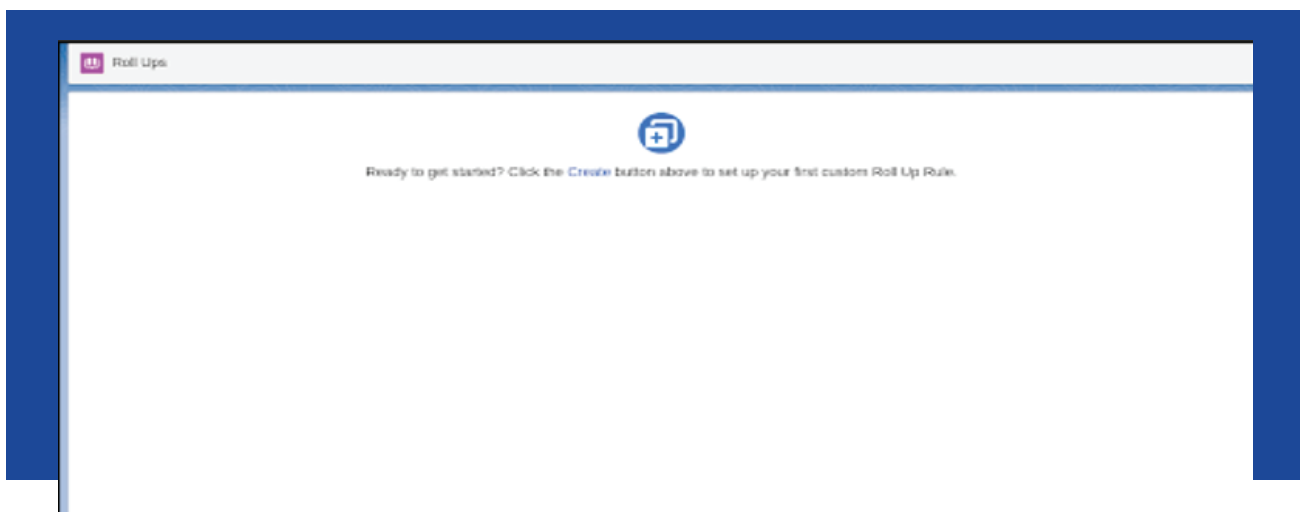
Before uninstalling RollUp Magic, ensure that all the triggers deployed by RollUp Magic, which start with the name "RUM," are deleted.

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. 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.



2. Main Features of RollUp Magic:

2.1. Create a Rollup Record:

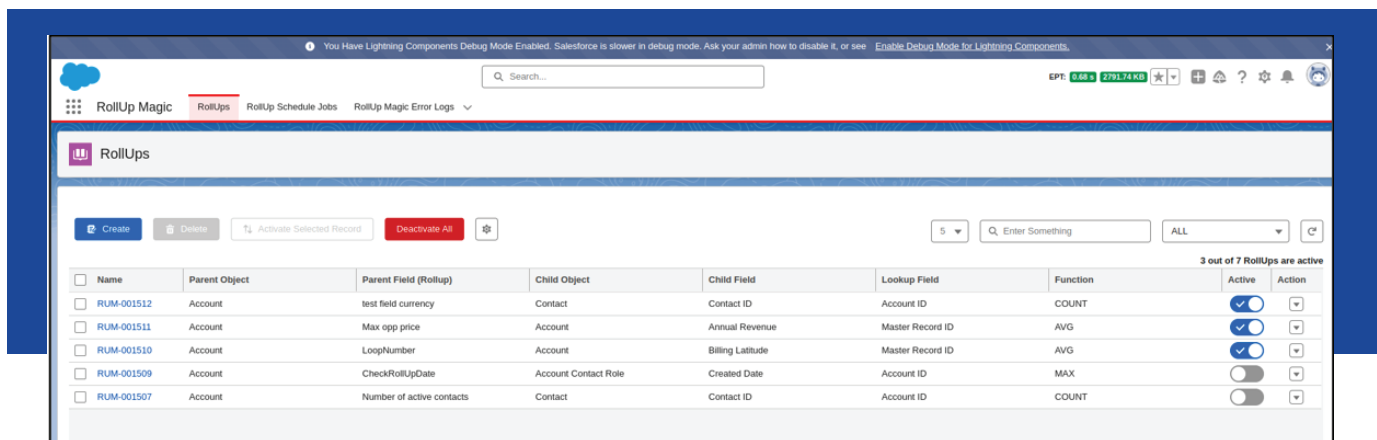
Use the intuitive Rollup Magic interface to create new rollups.

2.2. View Existing Rollups:

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

2.3. Roll Up Schedule Jobs:

Schedule all roll up jobs to automate the process at specified intervals.



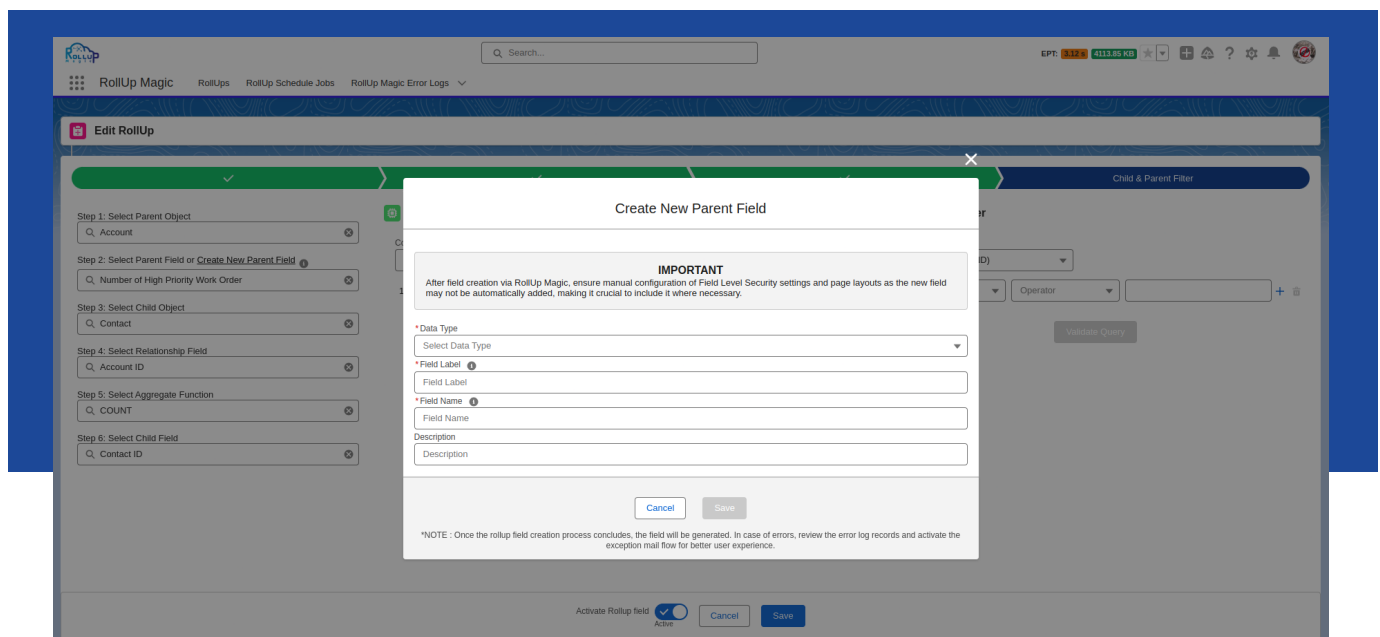
The screenshot displays the RollUp Magic interface within a Salesforce environment. The top navigation bar includes the RollUp Magic logo and tabs for RollUps, RollUp Schedule Jobs, and RollUp Magic Error Logs. The main content area shows a list of rollup records with columns for Name, Parent Object, Parent Field (Rollup), Child Object, Child Field, Lookup Field, Function, Active status, and Action. The table lists five records, with the first three being active and the last two being inactive. The interface also includes a search bar, a table filter, and a status indicator showing 3 out of 7 RollUps are active.

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	Active	
RUM-001511	Account	Max opp price	Account	Annual Revenue	Master Record ID	AVG	Active	
RUM-001510	Account	LoopNumber	Account	Billing Latitude	Master Record ID	AVG	Active	
RUM-001509	Account	CheckRollUpDate	Account Contact Role	Created Date	Account ID	MAX	Inactive	
RUM-001507	Account	Number of active contacts	Contact	Contact ID	Account ID	COUNT	Inactive	

3. Create Your First Rollup Record

3.1 Select Parent Object and Field:

- Choose the parent object and field for the rollup. If needed, create a new field on the parent object.
- 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.'



The screenshot shows the 'Edit RollUp' interface in the RollUp Magic application. A modal titled 'Create New Parent Field' is open, displaying an 'IMPORTANT' notice and a form for creating a new parent field. The background interface shows a step-by-step configuration process for a rollup record.

Create New Parent Field Modal:

IMPORTANT
After field creation via RollUp Magic, ensure manual configuration of 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
Select Data Type

* Field Label
Field Label

* Field Name
Field Name

Description
Description

Buttons: Cancel, Save

*NOTE : Once the rollup field creation process concludes, the field will be generated. In case of errors, review the error log records and activate the exception mail flow for better user experience.

Background Interface (Edit RollUp):

RollUp Magic | RollUps | RollUp Schedule Jobs | RollUp Magic Error Logs

Child & Parent Filter

Step 1: Select Parent Object
Q, Account

Step 2: Select Parent Field or Create New Parent Field
Q, Number of High Priority Work Order

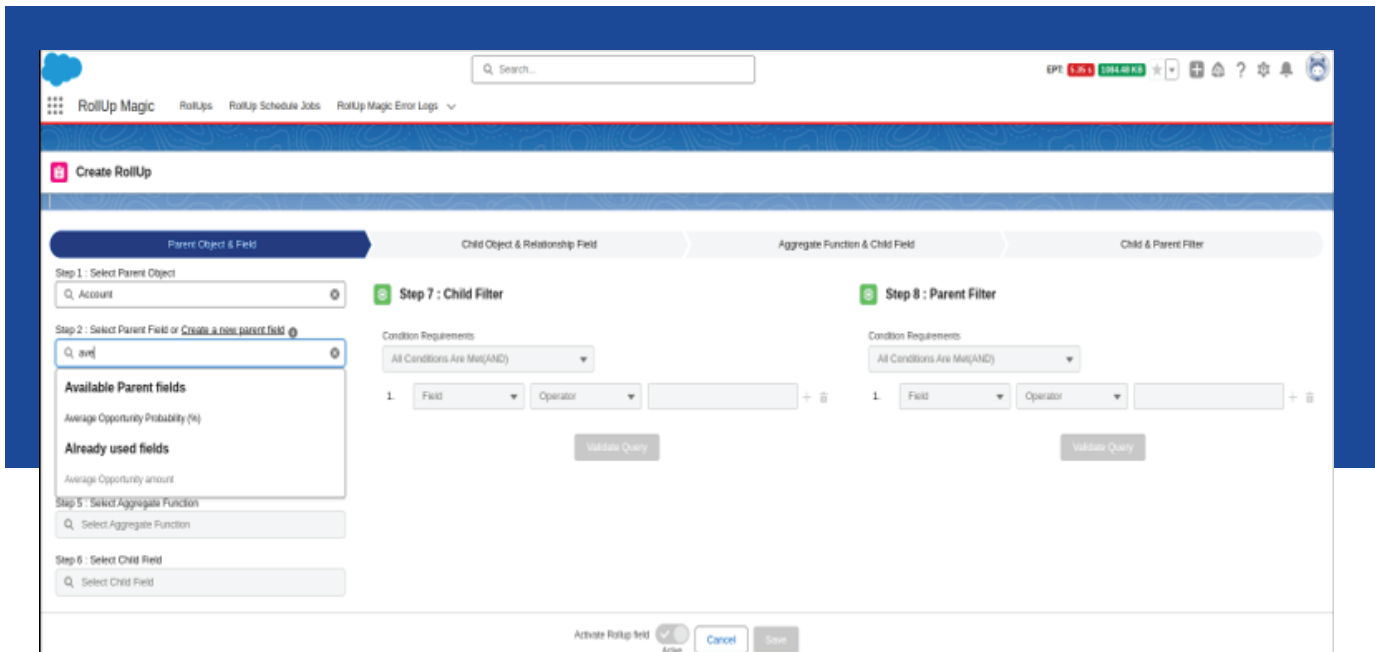
Step 3: Select Child Object
Q, Contact

Step 4: Select Relationship Field
Q, Account ID

Step 5: Select Aggregate Function
Q, COUNT

Step 6: Select Child Field
Q, Contact ID

Activate Rollup field: Active (checked) | Cancel | Save



3.2 Select Child Object and Relationship Field:

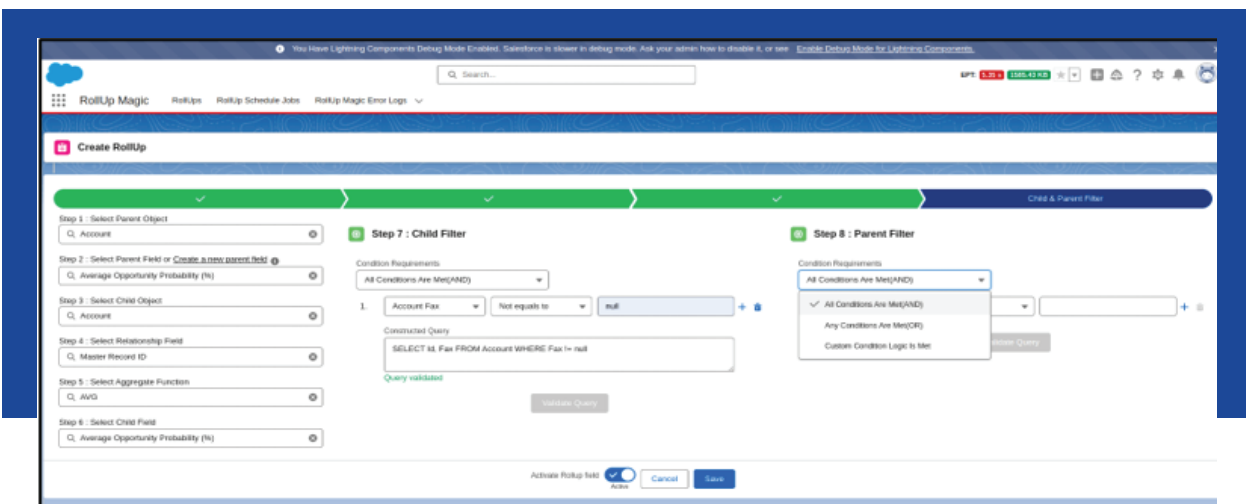
- Define the child object and its relationship field for the rollup.

3.3 Choose Aggregate Function and Child Field:

- Select the aggregate function and child field for the rollup.
- Choose the child field based on the data type of the selected parent field.

3.4 Set Child and Parent Filters:

- Additionally, you can define filters for the child and parent objects



3.5 Validate Query:

- Validate the query for accuracy.

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.

- If filter records are not validated, the save button will be disabled.

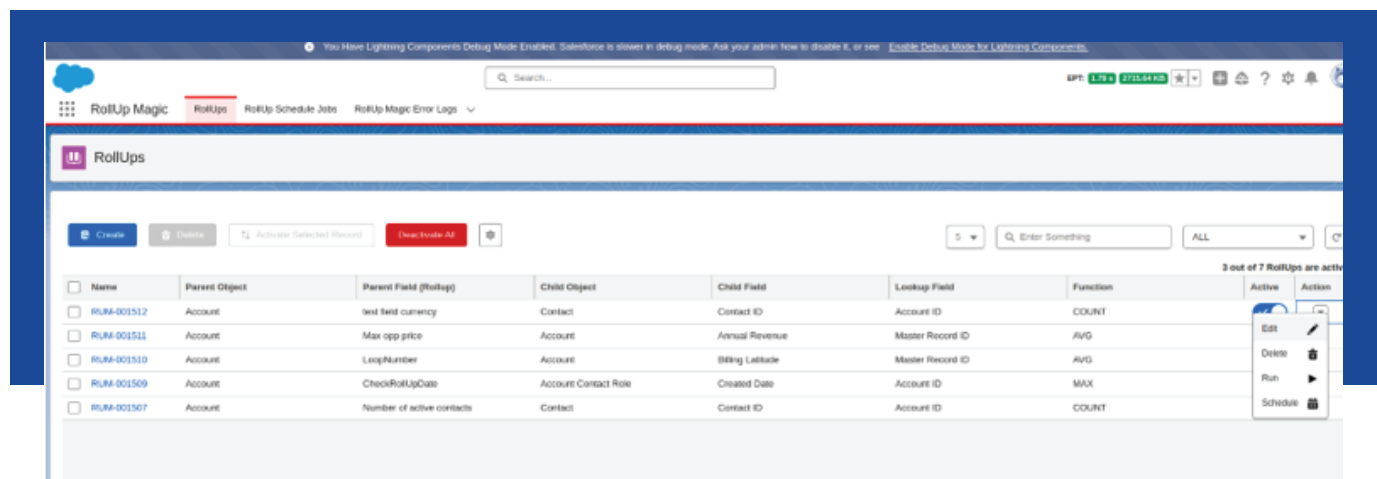
3.6 Activate Roll Up and Save:

- Rollups are “Activated” by default, but you can choose to deactivate them if needed and save your settings.
- The "Save" Button will only become enabled when both child and parent filter conditions are validated with no errors.
- Hover over a dropdown option to view its API name.

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

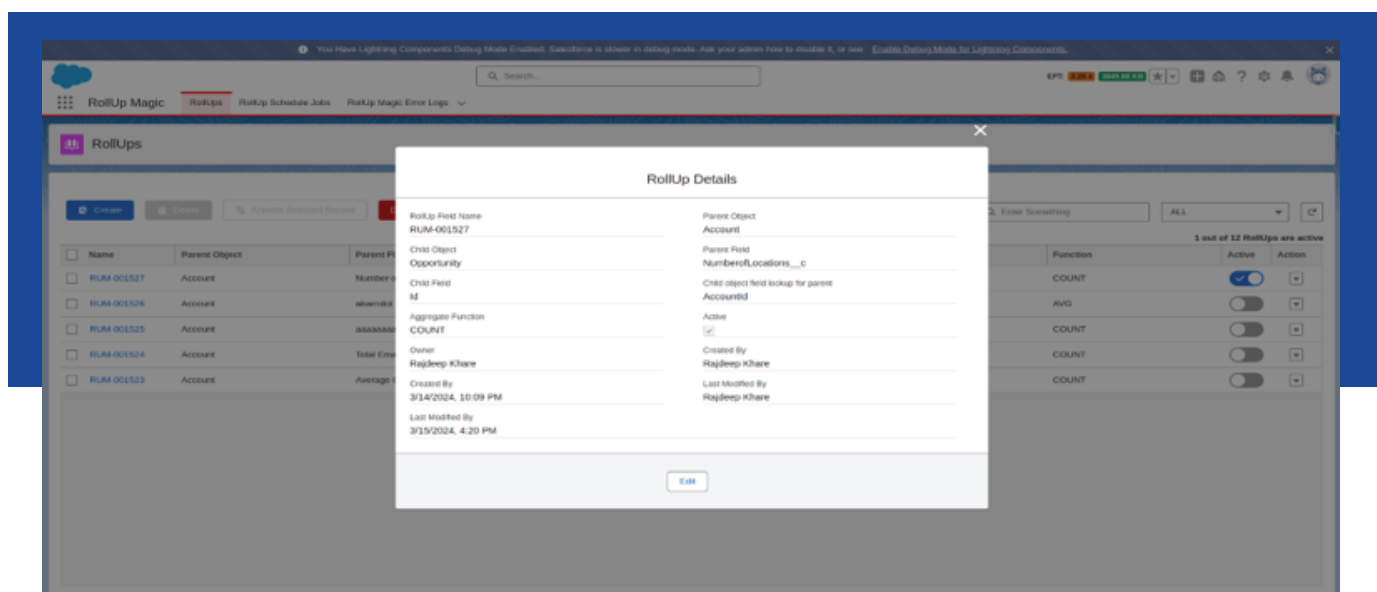
4 . RollUp Action Buttons:

Each RollUp offers 4 action buttons in the dropdown menu:



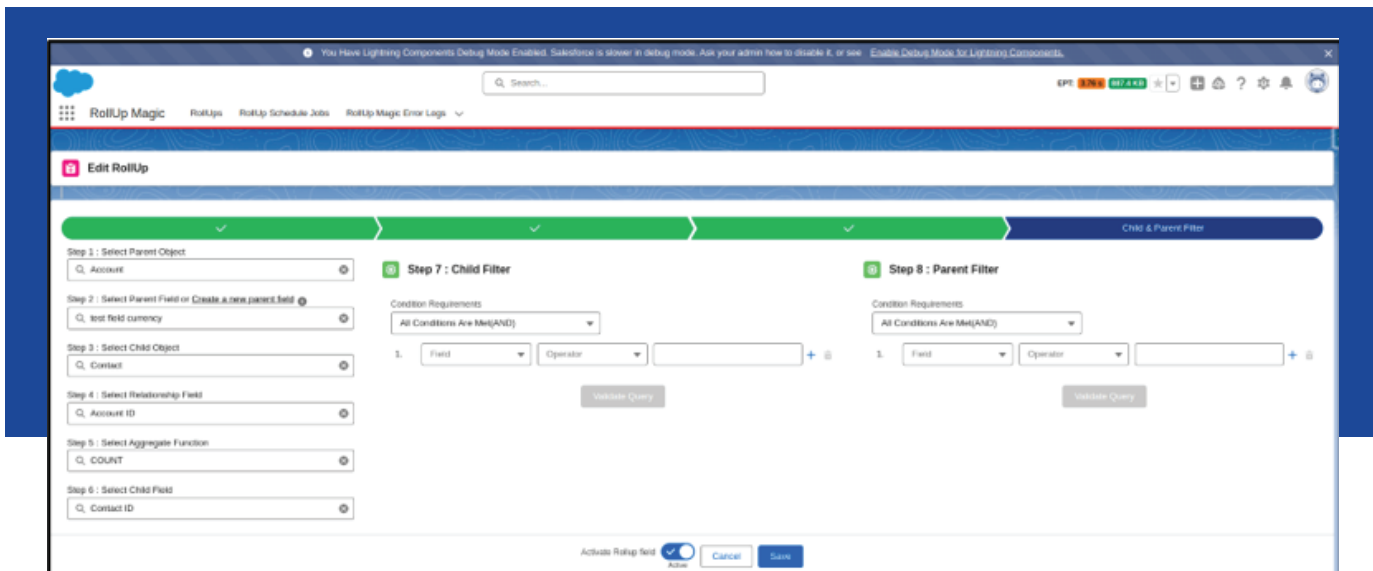
4.1 View:

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



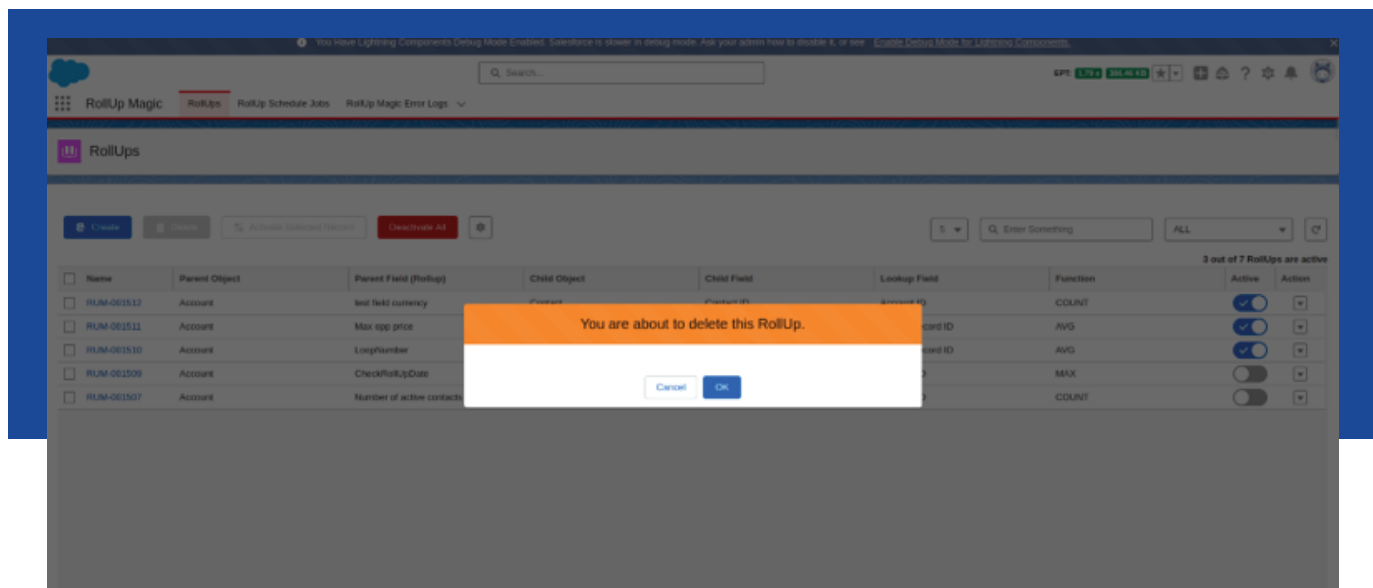
4.2 Edit:

Adjust and customize rollup fields along with their respective filters.



4.3 Delete:

Remove the rollup field along with any applied filters.



Name	Parent Object	Parent Field (Rollup)	Child Object	Child Field	Lookup Field	Function	Active	Action
RUM-002512	Account	test field currency	Contact	Account ID	Account ID	COUNT	<input checked="" type="checkbox"/>	
RUM-002512	Account	Max app price	Contact	Account ID	Account ID	AVG	<input checked="" type="checkbox"/>	
RUM-002510	Account	LoanNumber	Contact	Account ID	Account ID	AVG	<input checked="" type="checkbox"/>	
RUM-002509	Account	CheckRollupDate	Contact	Account ID	Account ID	MAX	<input type="checkbox"/>	
RUM-002507	Account	Number of active contacts	Contact	Account ID	Account ID	COUNT	<input type="checkbox"/>	



4.4 Run:

Manually trigger the rollup process for immediate execution.

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

The screenshot shows the RollUp Magic interface with a success message: "Success! The values of the Rollup field have been updated for all records." Below the message is a table of RollUps.

Name	Parent Object	Parent Field (Rollup)	Child Object	Child Field	Lookup Field	Function	Active	Action
<input type="checkbox"/> RUM-001512	Account	test field currency	Contact	Contact ID	Account ID	COUNT	<input checked="" type="checkbox"/>	<input type="button" value="Run"/>
<input type="checkbox"/> RUM-001511	Account	Max opp price	Account	Annual Revenue	Master Record ID	AVG	<input checked="" type="checkbox"/>	<input type="button" value="Run"/>
<input type="checkbox"/> RUM-001510	Account	LoophNumber	Account	Billing Latitude	Master Record ID	AVG	<input checked="" type="checkbox"/>	<input type="button" value="Run"/>
<input type="checkbox"/> RUM-001509	Account	CheckRollupDate	Account Contact Role	Created Date	Account ID	MAX	<input type="checkbox"/>	<input type="button" value="Run"/>
<input type="checkbox"/> RUM-001507	Account	Number of active contacts	Contact	Contact ID	Account ID	COUNT	<input type="checkbox"/>	<input type="button" value="Run"/>

4.5 Schedule:

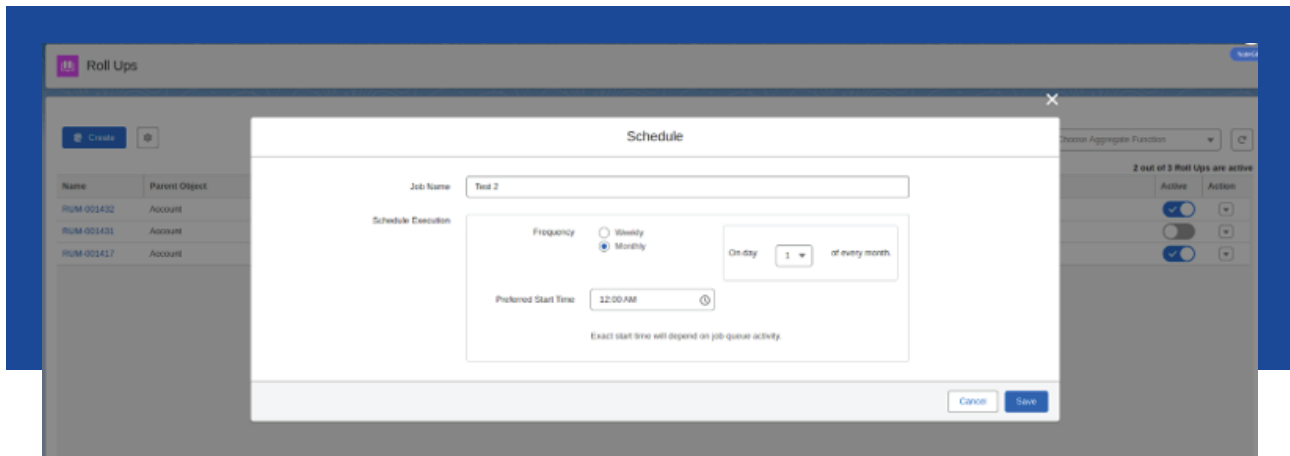
- Scheduled jobs to automate rollup execution at specified intervals.
-

Note : Selected rollup fields will be updated for all records.

- Choose between weekly or monthly scheduling options.
- If you want to schedule a job on a daily basis, you can select all the days of the week.

The screenshot shows the RollUp Magic interface with a "Schedule" dialog box open. The dialog box has the following fields and options:

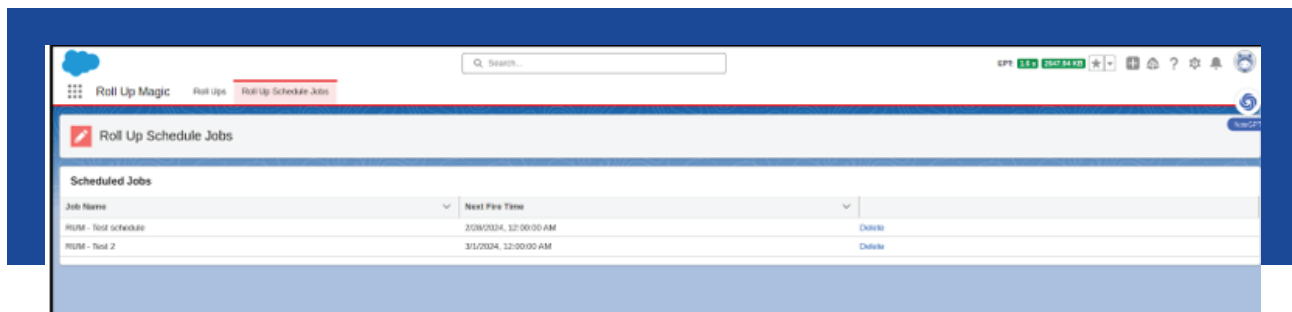
- Job Name: Test schedule
- Schedule Execution: Frequency (Weekly, Monthly)
- Occurs every week on: Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday
- Preferred Start Time: 12:00 AM
- Exact start time will depend on job queue activity.
- Buttons: Cancel, Save



The screenshot shows a 'Schedule' dialog box for a job named 'Test 2'. The 'Frequency' is set to 'Monthly'. The 'On day' is set to '1' of every month. The 'Preferred Start Time' is set to '12:00 AM'. A note states: 'Exact start time will depend on job queue activity'. The dialog has 'Cancel' and 'Save' buttons.

5. Layout of Schedule Roll Up Jobs:

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



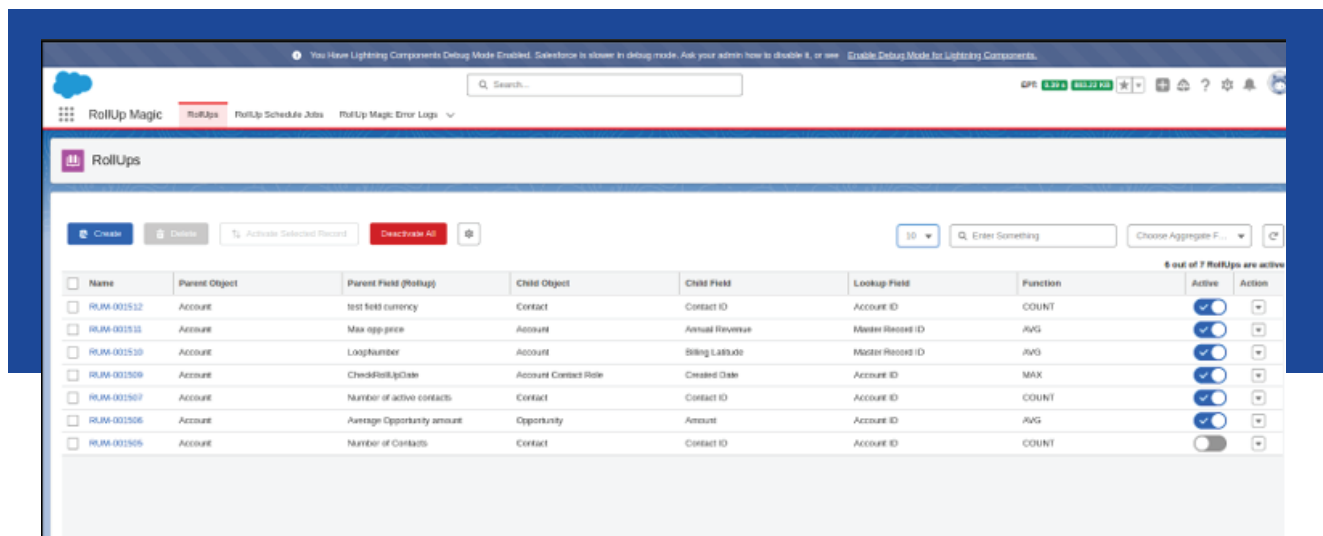
The screenshot shows the 'Roll Up Schedule Jobs' table with the following data:

Job Name	Next Fire Time	
RollUp - Test schedule	2/28/2024, 12:00:00 AM	Delete
RollUp - Test 2	3/1/2024, 12:00:00 AM	Delete

6. 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.



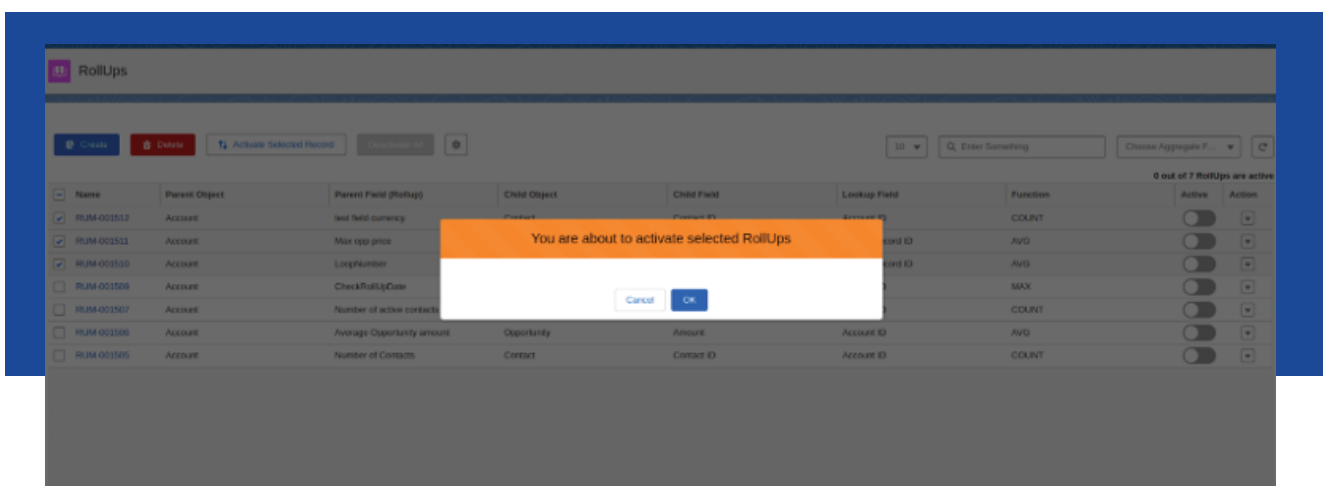
The screenshot shows the RollUp Magic interface with the 'Deactivate All' button highlighted in red. The table below lists the RollUp records:

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	<input checked="" type="checkbox"/>	
RUM-001511	Account	Max opp price	Account	Annual Revenue	Master Record ID	AVG	<input checked="" type="checkbox"/>	
RUM-001510	Account	LogNumber	Account	Billing Latitude	Master Record ID	AVG	<input checked="" type="checkbox"/>	
RUM-001509	Account	CheckRollUpDate	Account Contact Role	Created Date	Account ID	MAX	<input checked="" type="checkbox"/>	
RUM-001507	Account	Number of active contacts	Contact	Contact ID	Account ID	COUNT	<input checked="" type="checkbox"/>	
RUM-001506	Account	Average Opportunity amount	Opportunity	Amount	Account ID	AVG	<input checked="" type="checkbox"/>	
RUM-001505	Account	Number of Contacts	Contact	Contact ID	Account ID	COUNT	<input type="checkbox"/>	

7. Activate Selected RollUp Records:

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

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

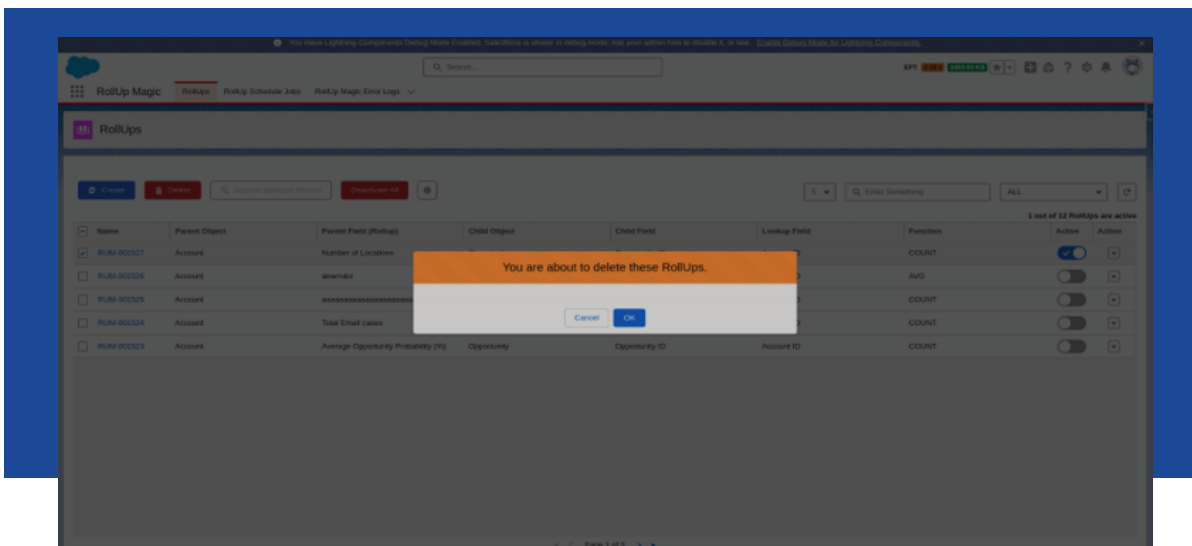


The screenshot shows the RollUp Magic interface with the 'Activate Selected Record' button highlighted in blue. A confirmation dialog is displayed in the center, stating: "You are about to activate selected RollUps". The dialog has 'Cancel' and 'OK' buttons.

8. Delete RollUp Records:

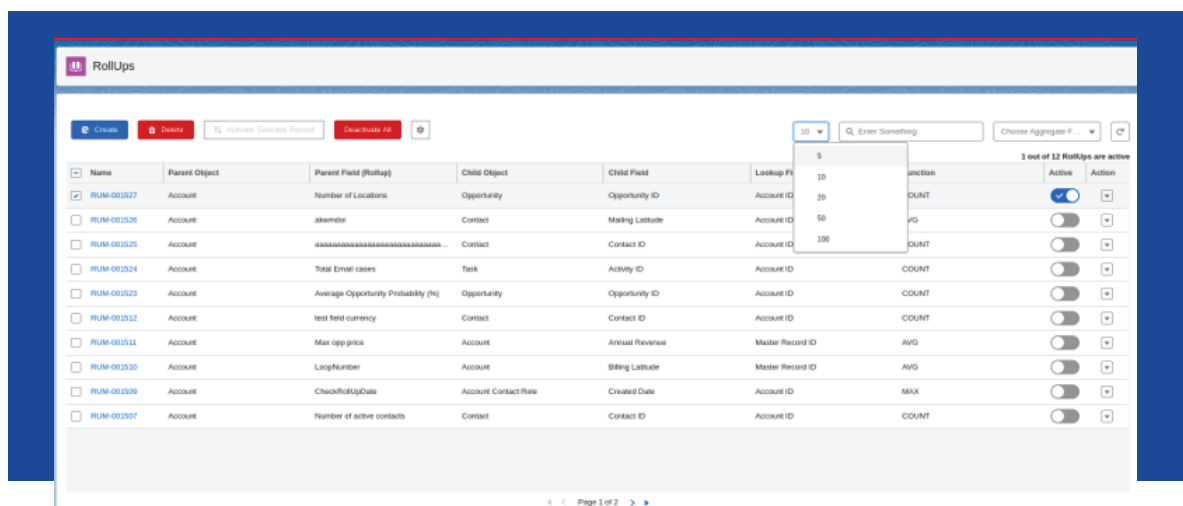
- Select and Delete mass rollups for efficient management and control.

Note : The “Delete Record” Button is enabled when RollUps are selected.



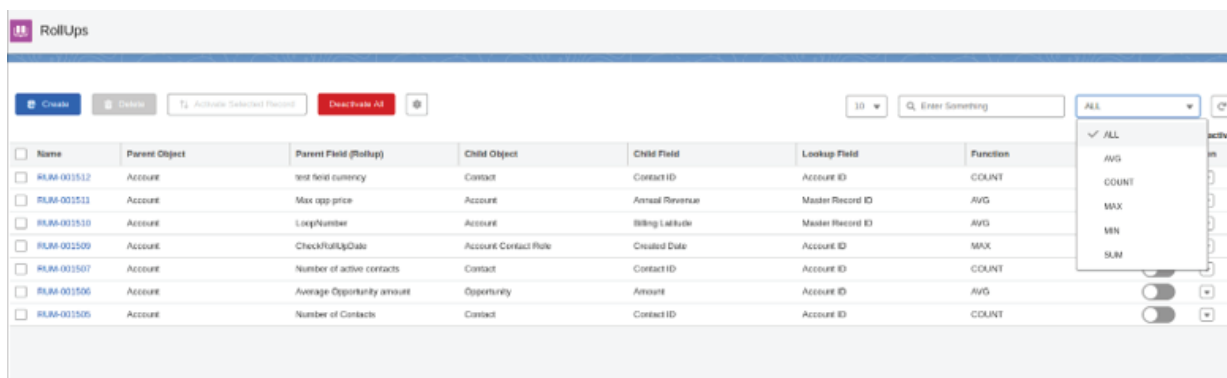
9. Manage Displayed Rows Using Selection Controls:

- 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.



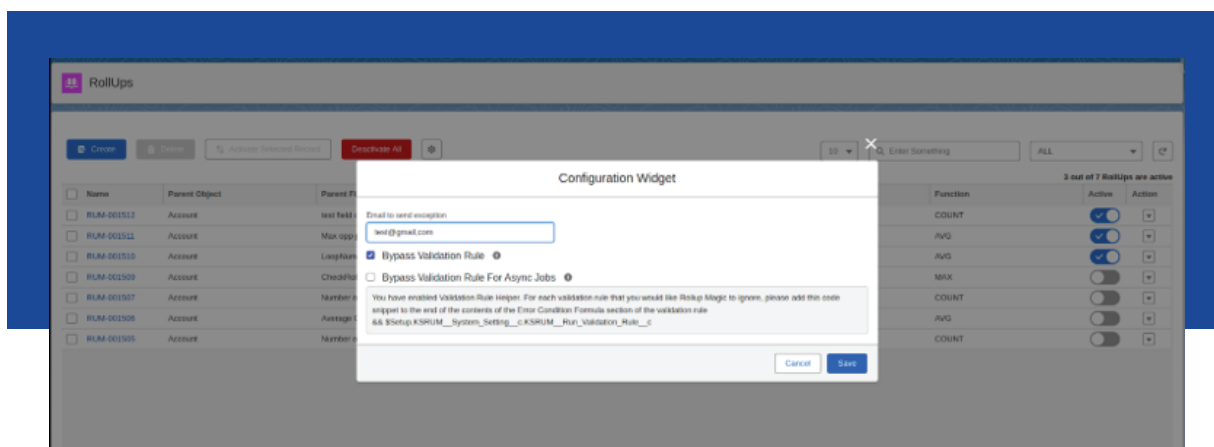
10. Filter By Function:

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



11. Configuration Widget Layout:

- **Gear Icon:** Click to access the Configuration Widget Layout.
- **ByPass Validation Rule:** Exclude validation checks during inserts or updates for smoother operations.
- **Exception Mail Recipient:** Recipient will receive the exception's notifications via email for quick issue resolution.



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!
