



FAQs

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What do I get with Rollup Helper Free Edition?

Rollup Helper Free Edition includes 3 active rollups that can be run manually, on a schedule, or in real-time. [View the full list of Rollup Helper Free Edition features.](#)

Can Rollup Helper roll-up information from a child Roll-Up Summary field to the Parent Account?

Yes! Unlike Roll-Up Summary Fields in Salesforce, Rollup Helper is able to perform Hierarchy rollups.

Can Rollup Helper roll-up information from Contacts to Accounts?

Yes! Since Rollup Helper uses normal Custom Fields instead of Roll-up Summary fields, the rollup can be configured easily without using custom code or triggers.

Does Rollup Helper have targeted or parent filter functionality?

Yes! You can now choose which records your rollup runs will process for.

Do I need to be familiar with SOQL to create filtered rollups?

No! Creating custom filters in Rollup Helper is simple and does not require any knowledge of SOQL.

I need to schedule more than 3 rollups, what do I do?

[Upgrade to Rollup Helper Premium Edition for unlimited rollups, or Starter Edition for 13 rollup settings.](#)

If I purchase Rollup Helper Premium or Starter Edition and my license expires, what happens?

If you have more than 3 active rollups, you will need to select which 3 you would like to keep active, but your rollup fields and existing data in them will still exist.

Should I be concerned about Rollup Helper consuming Salesforce resources or reaching the governor limits?

No! You can configure Rollup Helper to the unique resource constraints facing your Salesforce operating environment. Furthermore, all your data is processed natively on the Salesforce platform, so we are not consuming any API limits. [Read more about our product security here.](#)

I reached my limit for creating Roll-Up Summary Fields in Salesforce, can I still use Rollup Helper?

Yes! The normal Custom Fields populated by Rollup Helper do not count against your Roll-Up Summary Field limits.

How do I know if there are any problems with my rollups?

You can use the Rollup Helper Health Check page to see the current Rollup Helper status. The Health Check will list any issues found along with a risk level, issue summary and any recommended actions. To access Rollup Helper Health Check, go to the Rollup Helper tab and click "View Health Check." The health check will show you if any rollups encountered issues saving to the target field, or of any issues accessing the fields used by the setting.

You can check the Rollup Queue tab to see the progress of currently running Rollup jobs.

And you can check the Apex Jobs page from Setup in Salesforce to see the PS_QueueableRollup jobs which are used to process Rollup settings.

Does Rollup Helper work in Professional Edition orgs?

Yes, Rollup Helper can be installed in the following Salesforce Editions: Group, Essentials, Professional, Enterprise, Unlimited, Force.com, Developer and Performance. For Professional Edition Salesforce orgs and lower, some features of the app rely on API and may be limited due to Salesforce restrictions on the type of Org. Examples include using real time triggers that are not part of the managed package or creating a new field from within the app. By default, Rollup Helper comes with triggers for the following objects: Account, Contact, Event, and Task. We do have trigger extension packages available for most standard objects, and alternatives are available for real time enablement on custom objects. If you need assistance with trigger or field creation, [contact us](#) for full information on features/functionality that are affected and what workarounds can be used.

I deploy Apex code into production. Will Rollup Helper interfere with this process?

No. Rollup Helper code runs in its own namespace, just like other managed applications. Managed apps have their own code coverage requirement and all unit tests within a package must successfully pass in a development org before the package may be created. We recommend that you run all your unit tests with the "RunAllTests = false" attribute if you are using Rollup Helper as this is the Salesforce default. This default setting will prevent any local discrepancies (e.g. custom required fields, validation rules) from impacting your code deployments as our unit tests will fail if you have custom required fields, validation rules, etc. As long as you have the "RunAllTests = false" attribute set, you can deploy your apex code as normal. Changing to "RunAllTests = true" will not cause Rollup Helper install or performance issues.

Here is an official statement from Salesforce on this topic:

Managed package code is not included in the required code coverage calculation for deployment. The 75% requirement is on all Apex code in your org's namespace. Managed code has its own namespace, so it is not included. When deploying to production, all tests in your org's namespace will be run. Managed tests will not be run by default. If the deployment package explicitly marks runAllTests to true, managed tests will also run. These will need to execute without any failures should the flag be set. Despite this, the 75% requirement for code coverage is still only on unmanaged code.

If for some reason you are concerned with setting "RunAllTests = false", we guarantee that Rollup Helper will still function correctly.

What is your release process?

[Our release process can be found here.](#) [Rollup Helper release notes can be found here.](#)

Where do I go for help?

For self-service, you can look at all of our [Rollup Helper support resources](#).

If you need to reach out to ask questions, we have live chat on our website, and you can submit a question to support@passagetech.com. We also recommend that you join our [Trailhead Group](#). Here you can post new questions and click the small magnifying glass right above the feed to search for previous questions and answers.

What is the Field Filter Validation Exception error?

"FIELD_FILTER_VALIDATION_EXCEPTION: Value does not exist or does not match filter criteria"

(Please note: this error isn't a validation exception and cannot be overridden with validation helper; it's set up as a lookup field filter, not a validation rule.)

This error is most frequently caused by lookup filters which will need to be (1) manually corrected, (2) removed, or (3) set to optional. If the error message isn't descriptive enough, make sure the value in the field adheres to the rule; find the filter criteria when editing the field under the object manager from setup.

What is the Unable to Lock Row error?

"UNABLE_TO_LOCK_ROW, unable to obtain exclusive access to this record"

This error is usually caused by one of three things: a User editing a record that is being edited by an asynchronous Rollup Helper job, by Rollup Helper asynchronous jobs attempting to lock the same record, or multiple jobs trying to modify the Validation Helper setting. Some troubleshooting steps could include lowering record scope or disabling "Enable Validation Rule Helper" in Rollup Helper Custom Settings.



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