Toolz

Power Tools for Admins

from

effeXoft

committed to be effective

Rollup Summaries User Guide

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For current and all previous versions, please refer to:

http://www.effexoft.com

Contents

1. Introduction

Rollup Summaries is one of the tools in Toolz package from Effexoft.

Rollup Summaries tool is built based on an open-source code project from Andrew Fawcett.

Inspired by the open source and with a thought of giving back to the Salesforce community, Effexoft has decided to make Toolz as a free tool forever.

Toolz package is listed on AppExchange at:

https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000FABeMUAX

2. Who can manage Rollup Summaries Tool?

A certified Salesforce Administrator with the help of this User Guide can be able to manage and maintain Rollup Summaries tool.

Effexoft recommends Salesforce Administrators who has some knowledge of objects, relationships and SOQL (Sequential Object Query Language) to manage and maintain the Rollup Summaries tool. If you are a Salesforce Administrator but if you do not have an idea of objects, relationships and SOQL, then, you can consult your Salesforce Developer. Or learn from Salesforce Trailhead.

This document provides few examples.

3. Two Types of Rollup Summaries

Look up roll up summaries tool helps create roll up summaries on a master-detail relationship as well as a look up relationship. The process and procedure is same for creating a rollup summary whether the objects are related with a master-detail relationship or a look up relationship.

1. Roll ups on objects with a Master-Detail relationship

Salesforce has a limited functionality in the roll up summary fields when there is a master-detail relationship between two objects. The following summary features are available in Salesforce.

- Count
- Sum
- Min
- Max

Look up rollup summaries tool in Toolz package provides the following additional features on objects with master-detail relationship:

- Avg

- Count Distinct
- Concatenate
- Concatenate Distinct
- First
- Last

2. Roll ups on objects with a Look up relationship

Look up rollup summaries tool in Toolz package provides the following features on objects with look up relationship:

- Avg
- Count
- Count Distinct
- Concatenate
- Concatenate Distinct
- First
- Last
- Max
- Min
- Sum

4. Rollup Summaries Use Cases

1. On a Master Detail Relationship

VP of Sales at Billion Galaxies LLC., wants to know the names of all open opportunities in each account. They deal with large companies and most of their accounts have multiple open opportunities. He wanted to have a field called "Name(s) of the Open Opportunities" on the Account object and he also wanted that field to be updated automatically.

A roll up summary field can be created on Account from the Opportunity, but it is not possible to get the list of Opportunity names rolled up to the Account.

Their Salesforce Administrator decided to use Rollup Summary tool from the Toolz package. We will see how to create it in the following sections.

2. On a Lookup relationship

BDR Manager at Billion Galaxies LLC., want to know how many contacts are there on each of their Accounts. He wanted to have a field called "Number of Contacts" of Account object.

Their Salesforce Administrator thought it is easy to do it with a standard Salesforce rollup summary but quickly realized that it is not possible to create a rollup summary field on Account from Contact object. We will see how to create it using Rollup Summary tool in the Toolz package in the following sections.

3. Rollup summaries on any directly related objects

Rollup Summaries can be created on any two directly related objects. To create a roll up summary, you need a parent object and a child object. The child object should have related field pointing to the parent object. Field API names are needed to create the Rollup Summary.

The process and procedure is same for creating a rollup summary whether the objects are related with a master-detail relationship or a look up relationship.

Objects in the Rollup Summaries can be Salesforce Standard objects or Custom objects.

5. Get ready to setup your first Rollup Summary

If you are here, you must have installed Effexoft's Toolz package from Salesforce's AppExchange and followed the installation instructions from **Toolz Installation Guide**. If you need help with Toolz installation, please refer to Toolz Installation Guide from Effexoft's website or from Toolz listing page on Salesforce AppExchange:

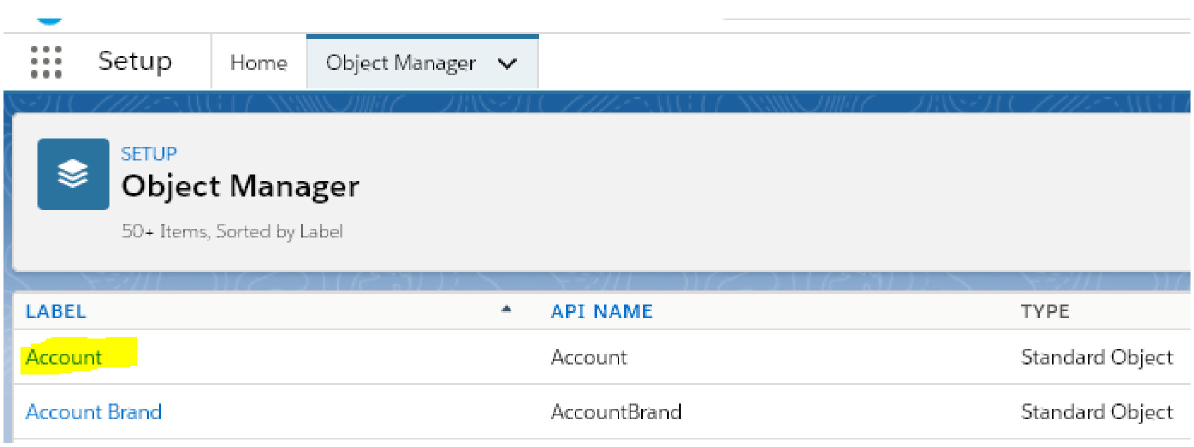
https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000FABeMUAX

6. Setting up a roll up summary field

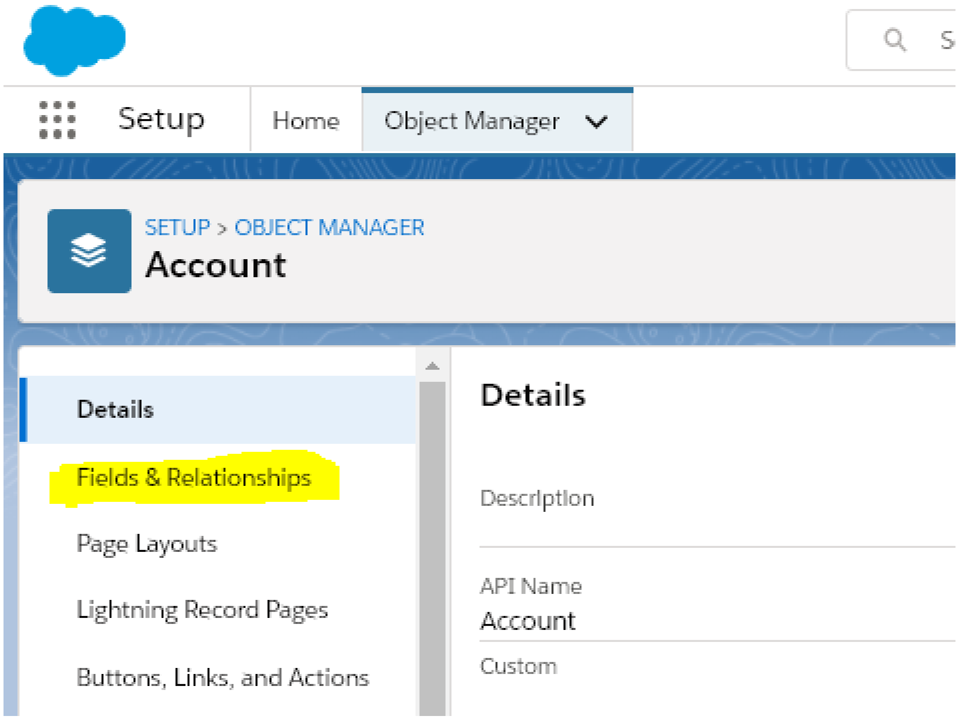
Let's first setup "Name(s) of the Open Opportunities" Rollup Summary on the Account object as we discussed in the use cases section.

To do this, we first need to create a text field on the Account object.

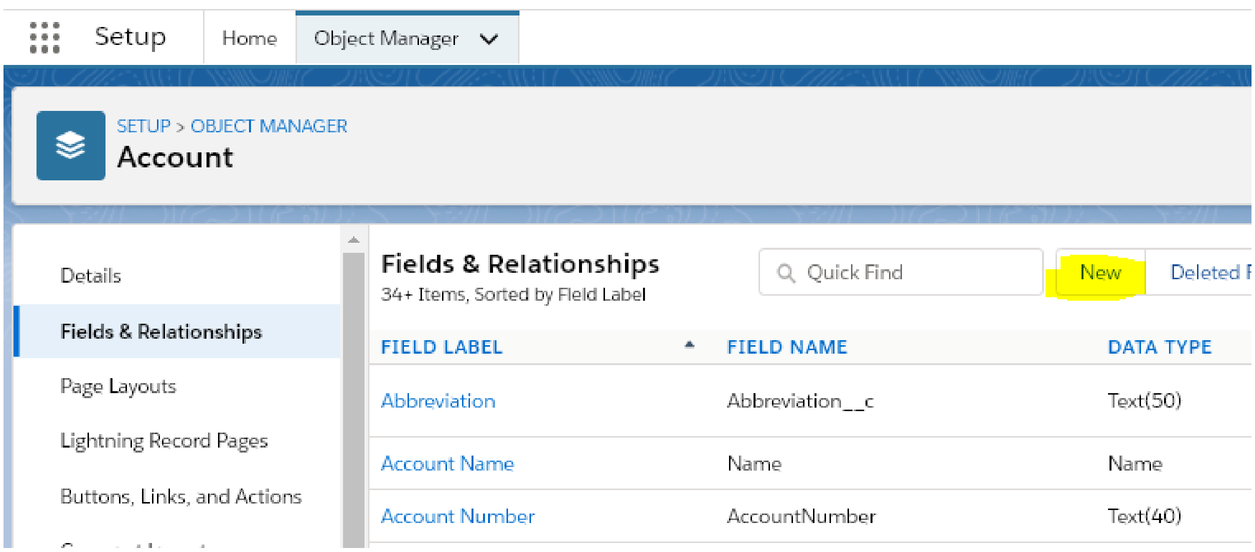
Let's go to setup, Object Manager and click on "Account" object.



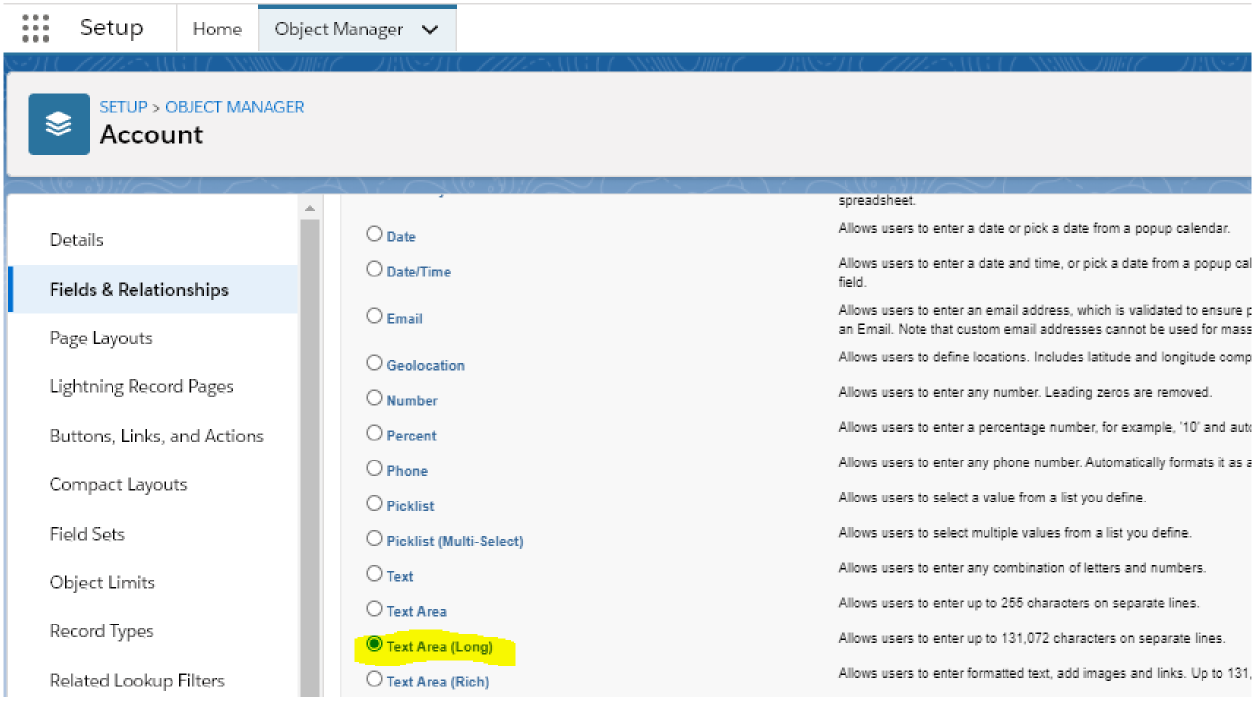
Then click on “Fields & Relationships”



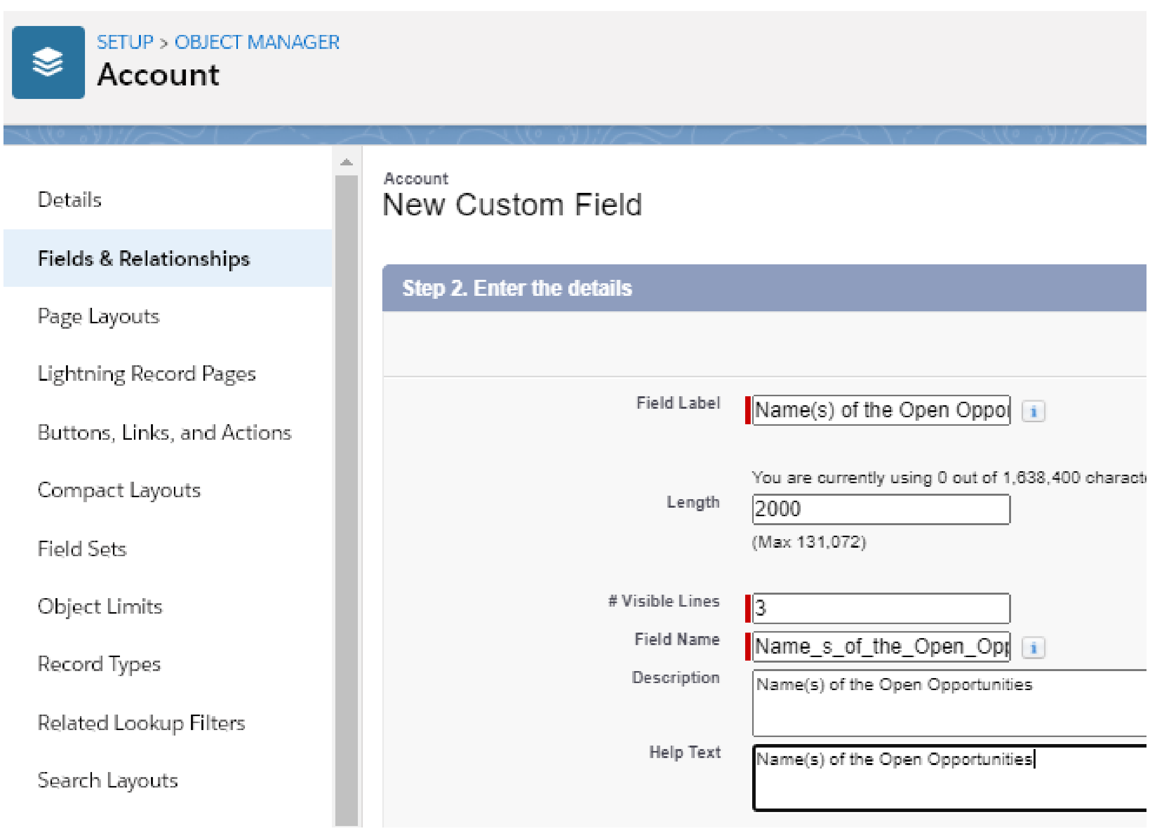
Click on “New” to create a new field.



Select field type as Text Area (Long)



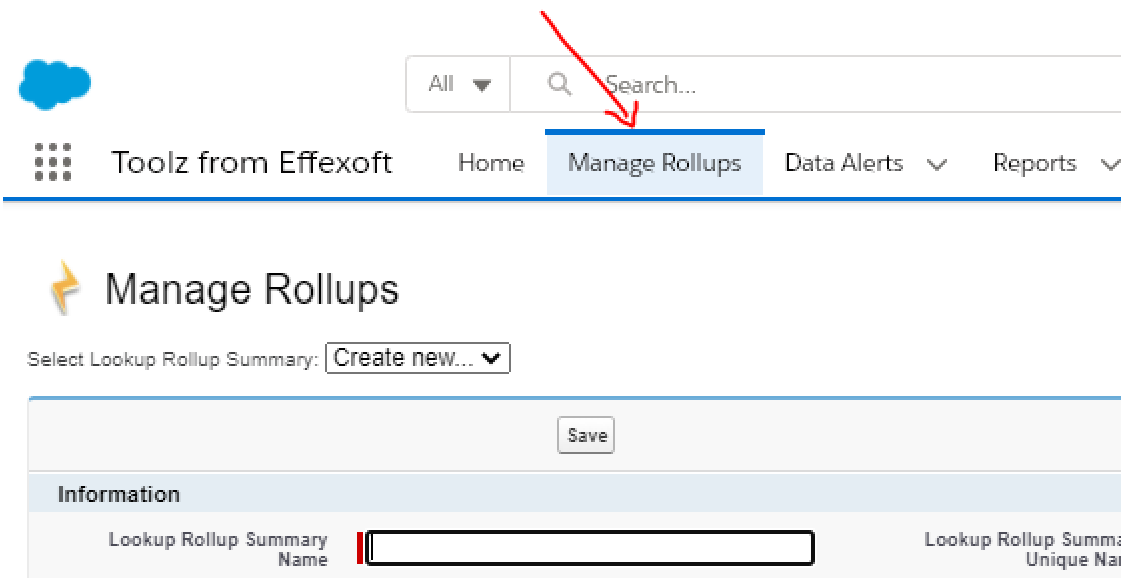
Then enter field label, length, visible lines, field name, description and help text fields.



Click on “Next” and follow the steps to create the field.

After creating the field, please note the API name of the field you just created. You need this field API name while creating the Rollup Summary. In this example, the field API name is “Name_s_of_the_Open_Opportunities__c”.

Now, let us create the Rollup Summary. Let us go to “Manage Rollups” tab in “Toolz from Effexoft” app.

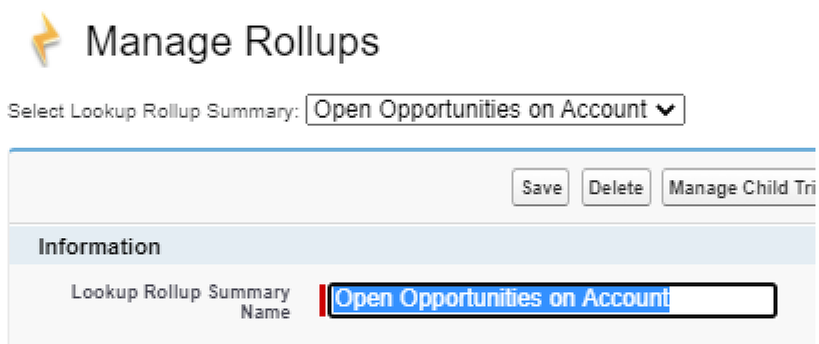


Please note that Lookup Rollup Summary Name and Lookup Rollup Summary Unique Name fields have a maximum length limit of 40 characters each. If you enter more than 40 characters in either of these two fields, you will get an error message.

Enter Lookup Rollup Summary Name and Lookup Rollup Summary Unique Name fields. In this example, we are going use the following values in these two fields:

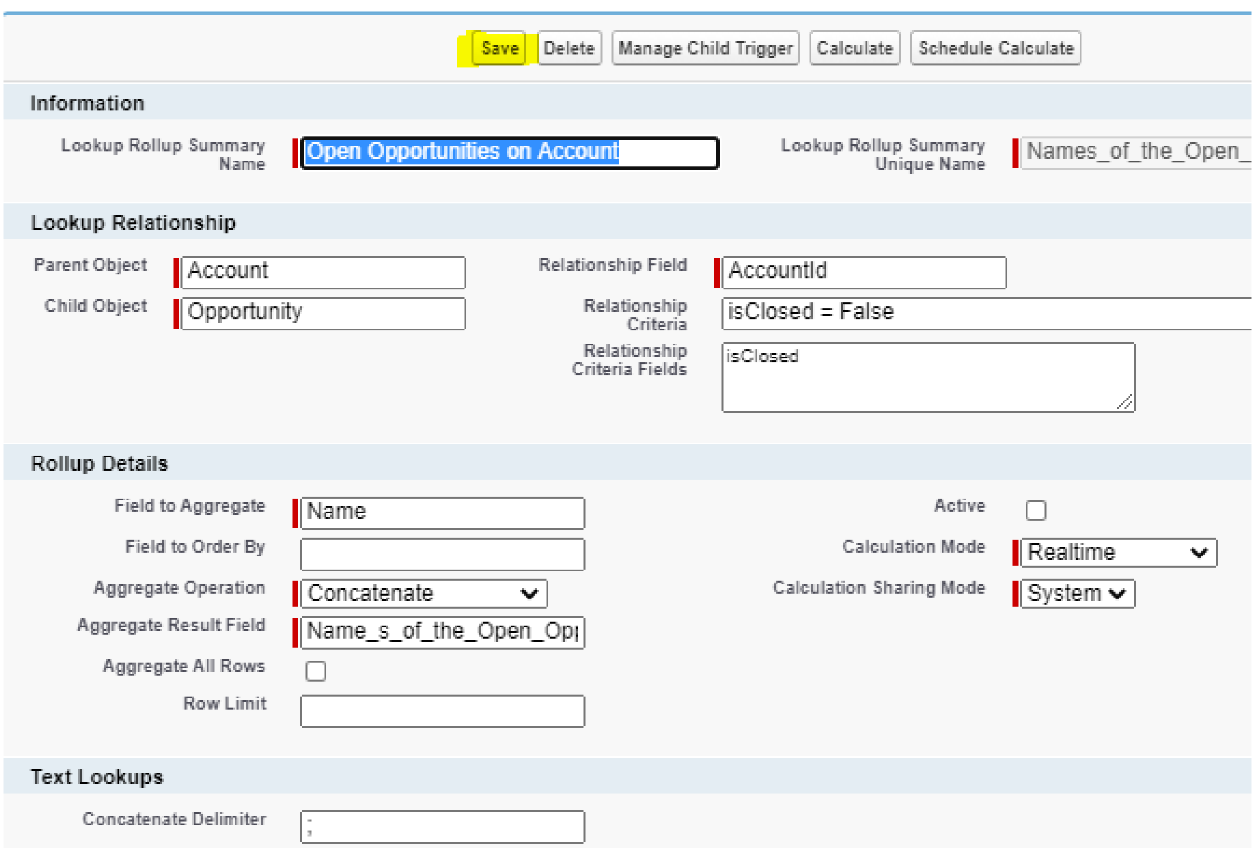
Open Opportunities on Account

Names_of_the_Open_Opportunities_on_Acc

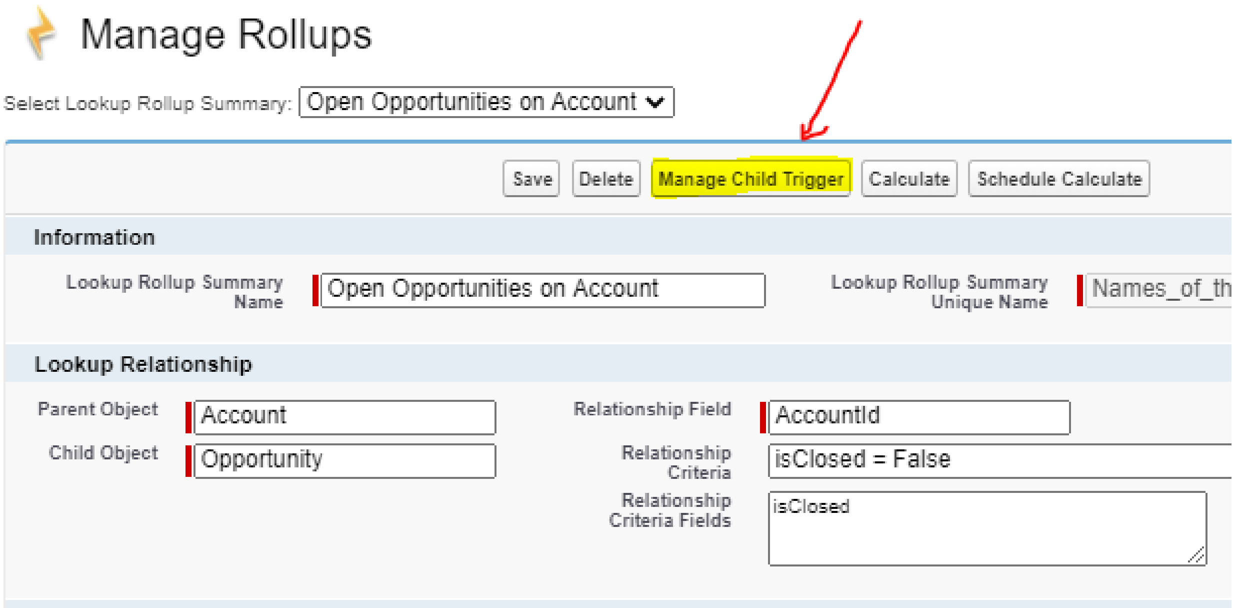


Then enter values in various fields as shown in the screenshot below.

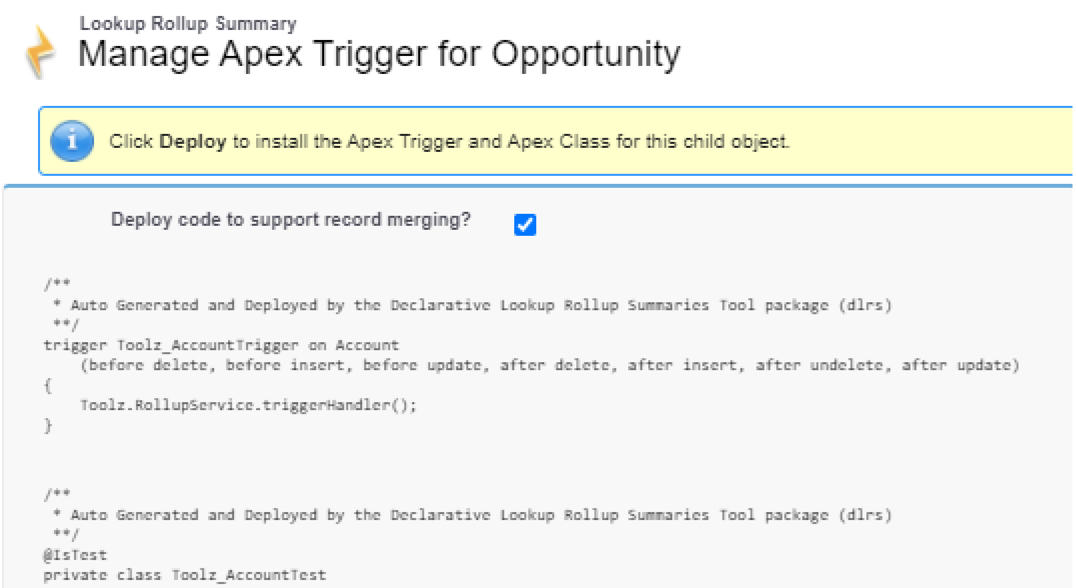
Leave Active checkbox not checked at this point of time. Enter a semi colon followed by a space in the Concatenate Delimiter field. Select "Concatenate" in the Aggregate Operation field. And finally click "Save" button.



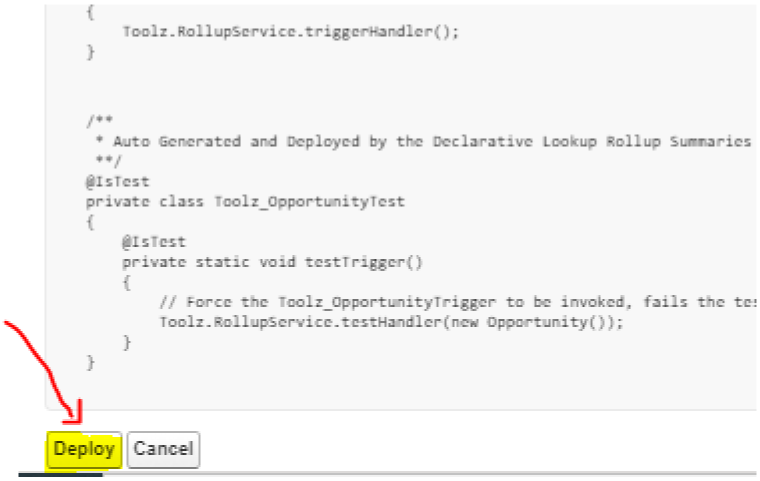
After saving the Rollup Summary, click on Manage Child Trigger to create and deploy a trigger on the child object, which is Opportunity in this case.



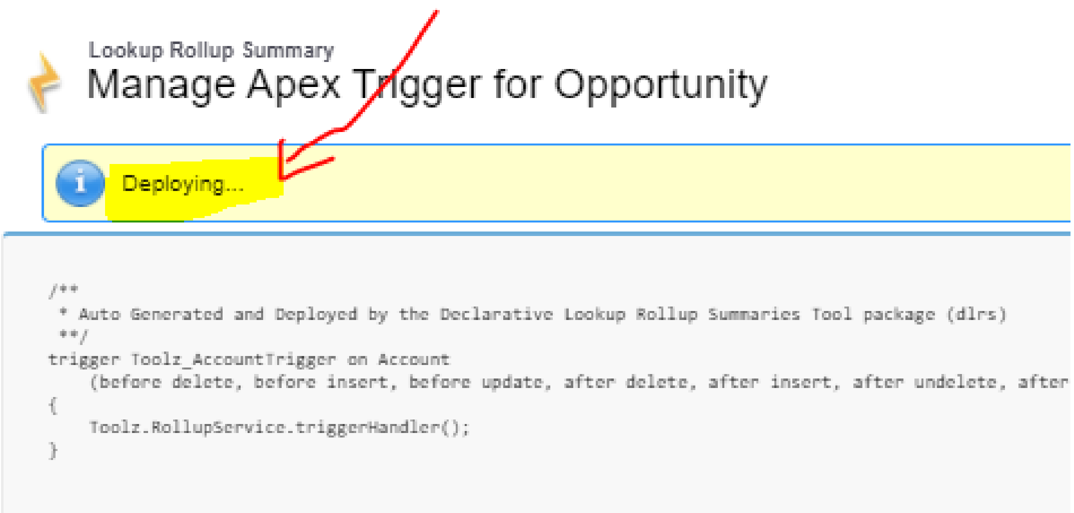
When you click on "Manage Child Trigger" button, you will see the following screen.



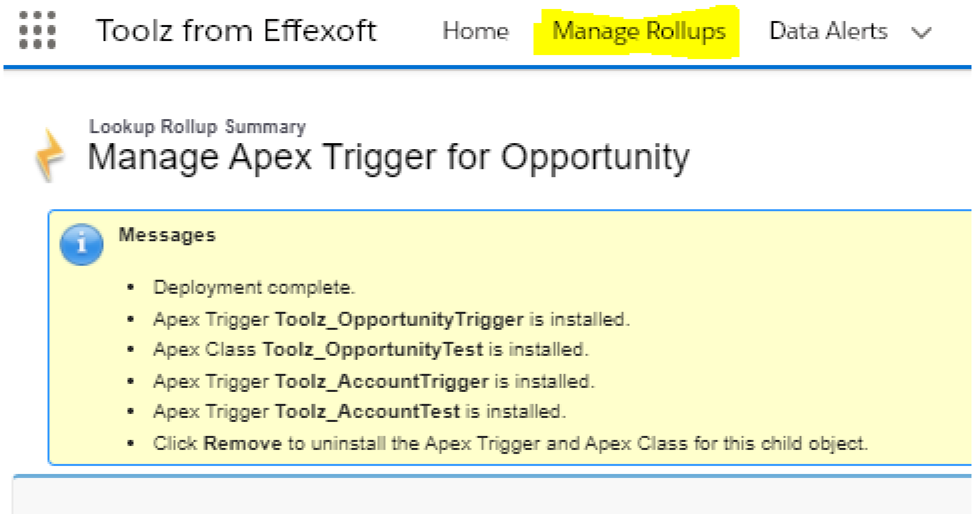
Scrolldown to the bottom of the page, and click on Deploy button.



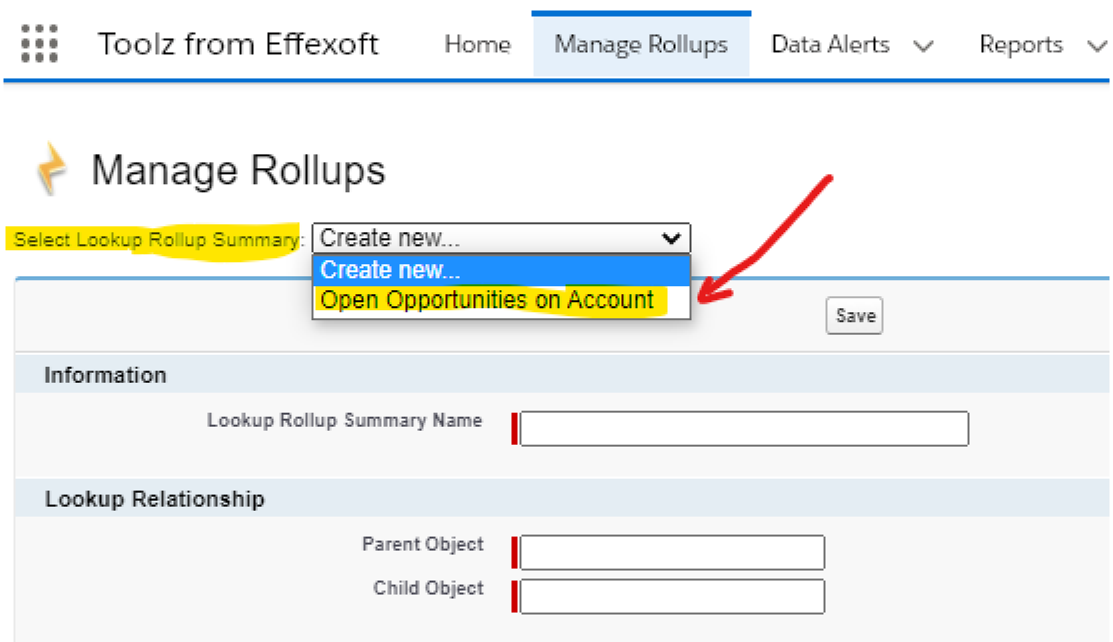
It will take a few seconds to couple of minutes to deploy the trigger. You will see a “Deploying…” message.



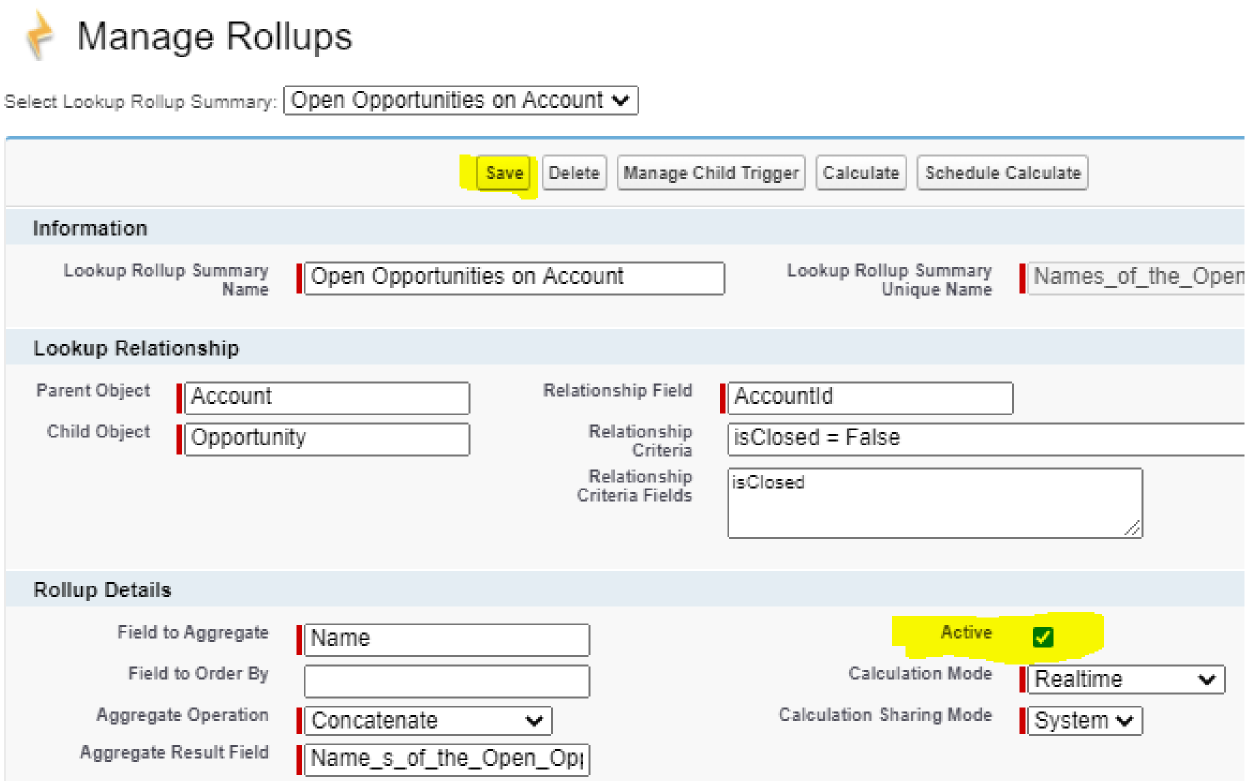
Once deployed, you will see a message saying that the Deployment is complete. Then, click on "Manage Rollups" again to come back to the Rollup we just created.



Then Select Lookup Rollup Summary you just created from the drop down box.

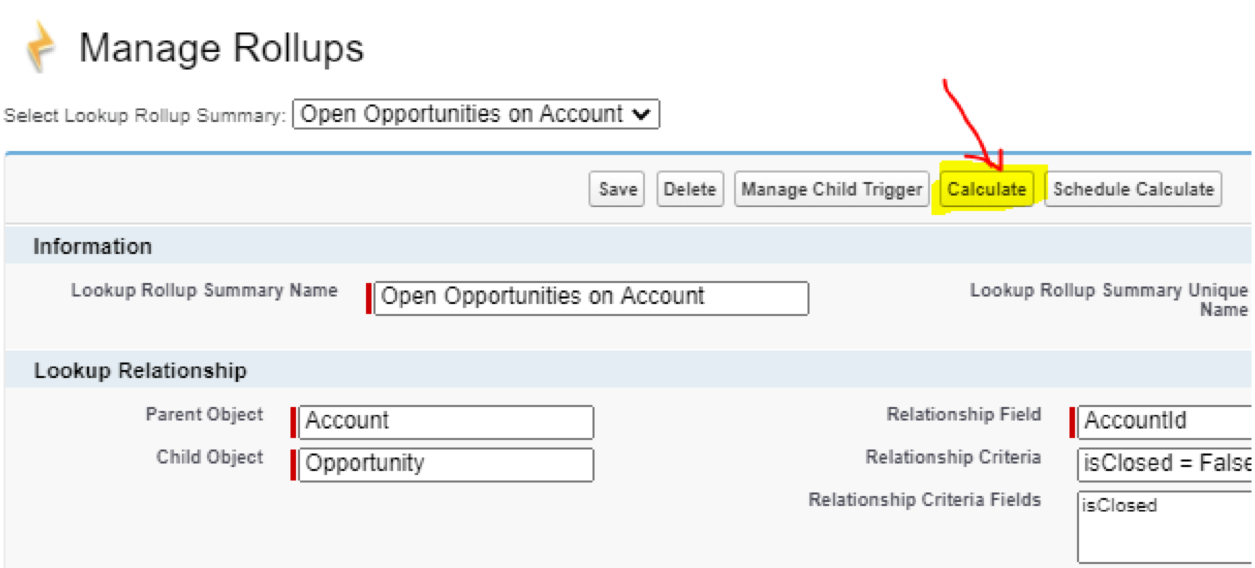


Now that you deployed the Trigger, you can now make the Rollup Summary active. Select the active checkbox and click on "Save" button.

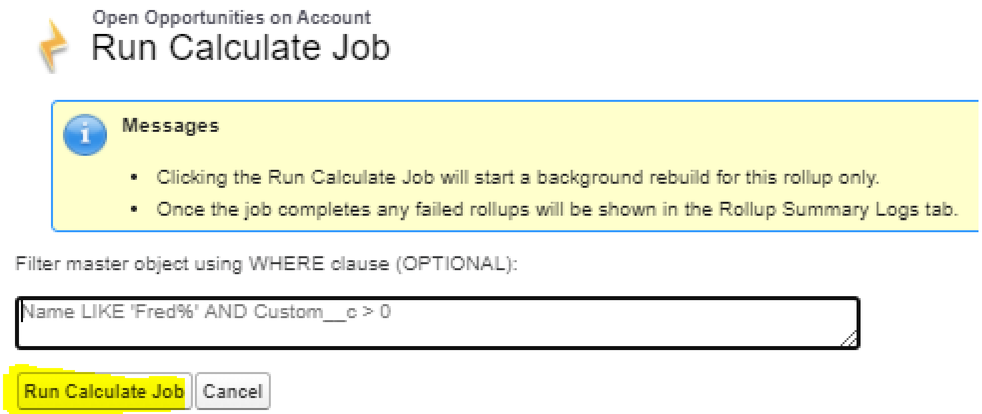


You Rollup Summary is now active.

If you already have existing Accounts and Opportunities and if you want to update the "Name(s) of the Open Opportunities" field on all Accounts, then, click on "Calculate" button.



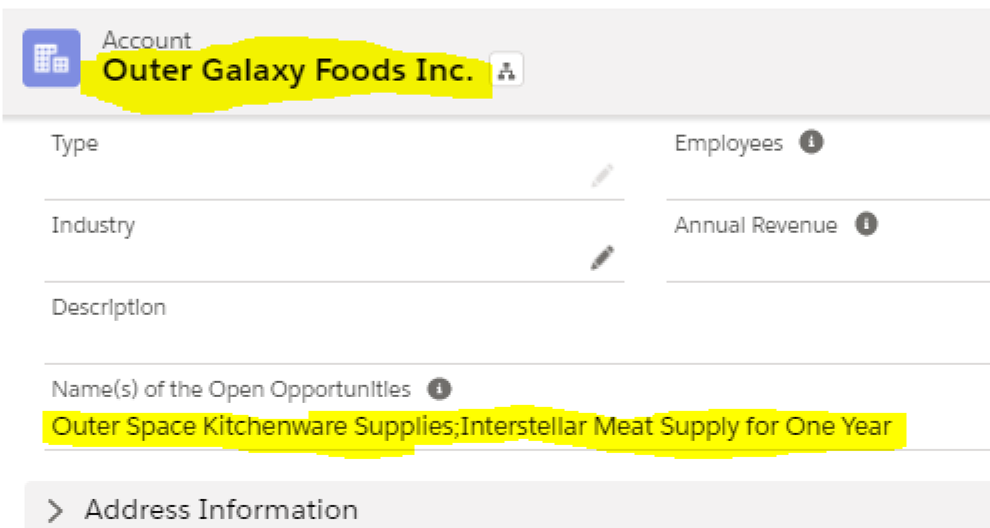
If you want to exclude some of the Accounts from this calculation, you can exclude them here by using a filter condition. If you would like to run this for all accounts, leave the text field blank and click on "Run Calculate Job" button.



The calculation will complete and you will come back to the Rollup Summary page.

Now, you can check couple of Accounts if the "Name(s) of the Open Opportunities" field on the Account is updated or not.

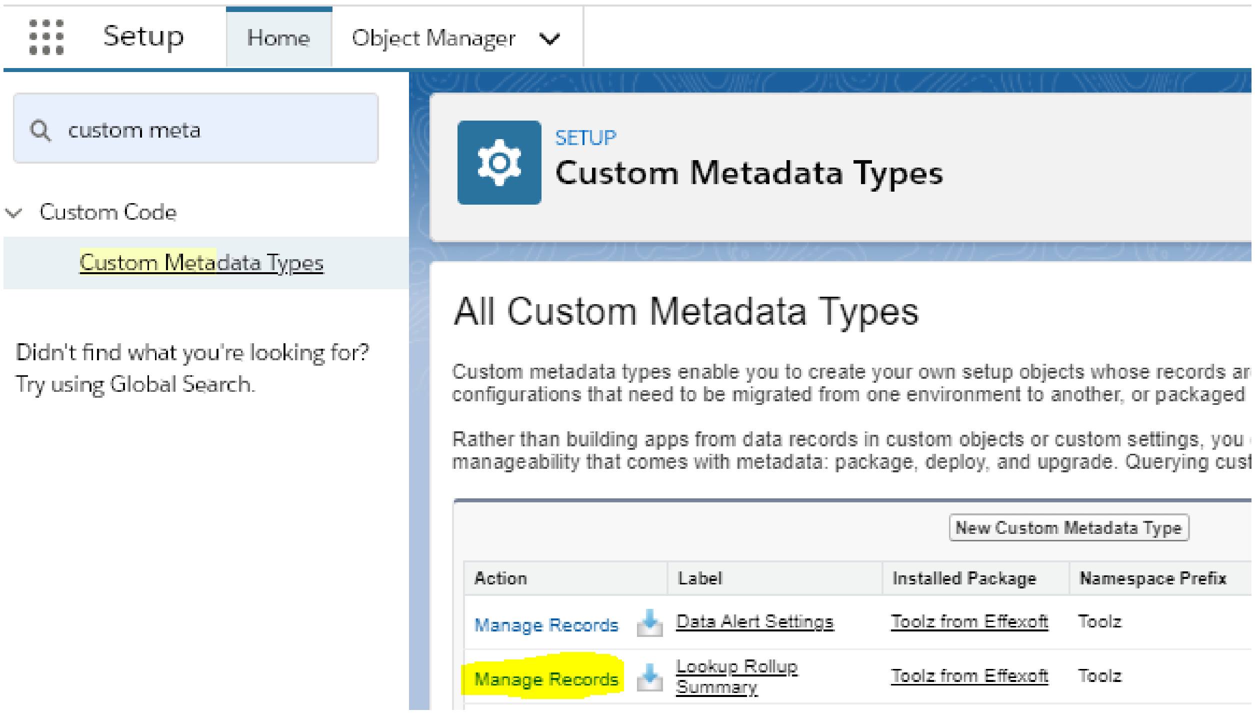
We checked it an account and it worked perfectly!



7. Understand how Rollup Summaries are stored

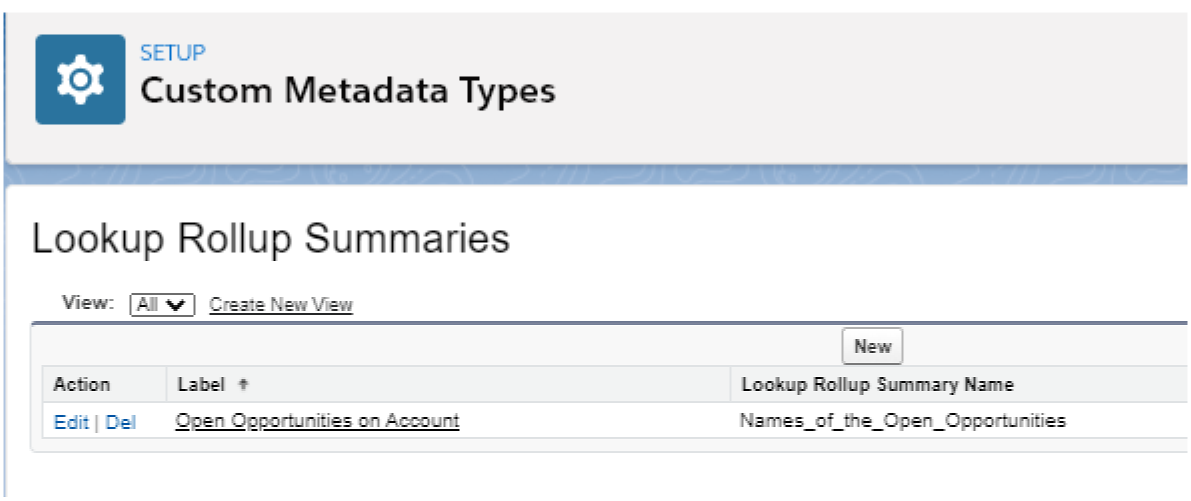
Rollup summaries are stored in Custom Metadata Types.

To see how they are stored, you can go to setup, search for “Custom Metadata Types” and see a list of existing Custom Metadata Types.



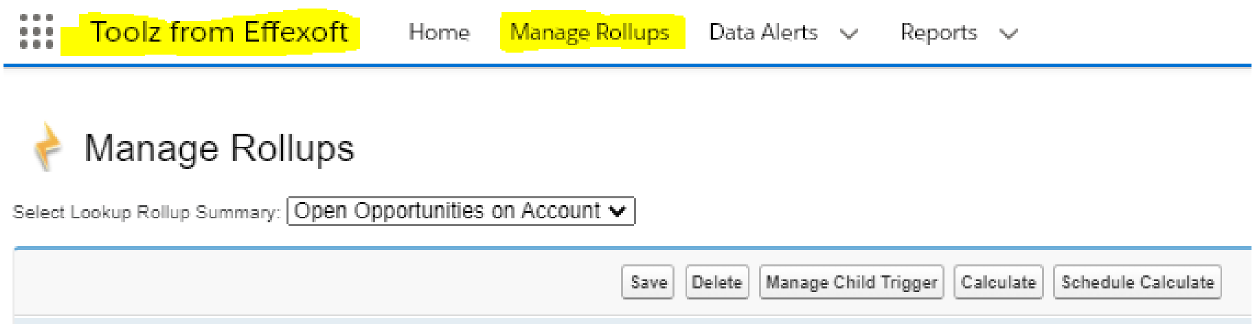
Click on “Manage Records” link next to “Lookup Rollup Summary” to see the existing list of Lookup Rollup Summaries.

Since there is only one Lookup Rollup Summary, you can see it.



Effexoft recommends that you do not make any changes here directly from the Custom Metadata unless you are a Salesforce developer.

It is always better to manage the Look up Rollup summaries from the Manage Rollups tab in the "Toolz from Effexoft" app.



8. Common Mistakes

1. Make Rollup Summary Active

After setting up the Rollup Summary, make sure it is active.

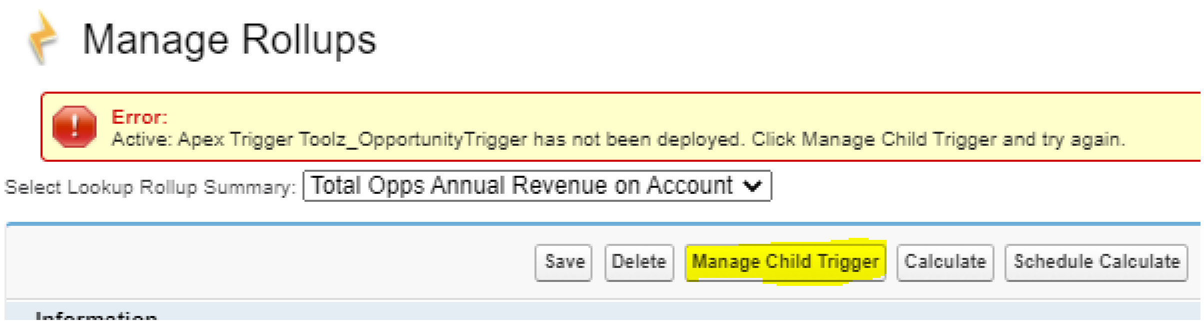
2. Make sure you test and verify the results

After creating a Rollup Summary, make sure you create a record on the child object or update the value in the "Field to Aggregate" on the child object. Then check if the value in the Aggregate Result Field on the parent object is updated correctly.

9. Common Errors

1. Apex Trigger has not been deployed!

If you forget to deploy the trigger on the child object using "Manage Child Trigger" button, and if you try to make the Rollup Summary active, you will receive "Apex Trigger has not been deployed" error.



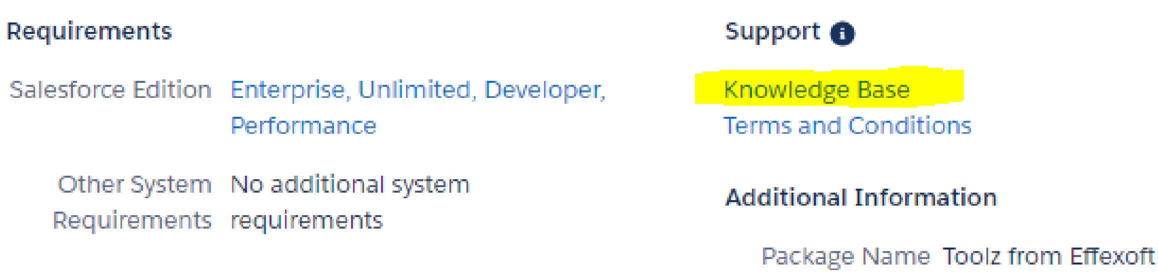
10. Support

Effexoft provides support from the following channels for Toolz application.

1. Knowledge Base link on Toolz package listing page on AppExchange

Toolz package is listed on AppExchange at:

https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000FABeMUAX



2. Email Support

Please send an email to support-toolz@effexoft.com if you have any questions related to Toolz package.

Effexoft will respond to all emails with in 48 hours or two business days.

3. Reviews section on Toolz package listing page on AppExchange

AppExchange is a Salesforce managed portal and it provides a “Reviews” section to interact with App Developers. Effexoft responds to any question / review posted on the Toolz package page in the AppExchange.

Effexoft appreciates feedback from all the users. If you have trouble working with Toolz, please email us at support-toolz@effexoft.com instead of leaving a comment in the reviews section.

4. Support for Enterprise Customers or Partners

Please contact your Account executive at Effexoft for any customization support or complex implementation, enhancement requests.

11. Enhancements and Feature Requests

Feel free to send us an email at support-toolz@effexoft.com if you would like to have an enhancement or a new feature in the Rollup Summary tool or in the Toolz package. We would love to add enhancing and adding more features / tools to Toolz package.