

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.
- 5. Click on "Save."

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.

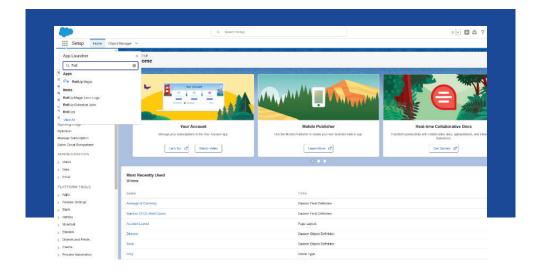


Features Guide

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.

RollUp Magic Roll Magic Roll Magic Ener Logs RollUp Magic Roll Magic Ener Logs RollUps RollUps Image: The Roll Magic Ener Logs Image: The Roll Magic Ener Logs Image: The Roll Magic Ener Logs Image: The Roll Magic Ener Logs Image: The Roll Magic Ener Logs Image: The Roll Magic Ener Logs Image: The Roll Magic Ener Logs Image: The Roll Magic Ener Logs Image: The Roll Magic Ener Logs Image: The Roll Magic Ener Logs Image: The Roll Magic Ener Logs Image: The Roll Magic Ener Logs Image: The Roll Magic Ener Logs Image: The Roll Magic Ener Logs Image: The Roll Magic Ener Logs Image: The Roll Magic Ener Logs Image: The Roll Magic Ener Logs Image: The Roll Magic Ener Logs Image: The Roll Magic Ener Logs Image: The Roll Magic Ener Logs Image: The Roll Magic Ener Logs Image: The Roll Magic Ener Logs Image: The Roll Magic Ener Logs Image: The Roll Magic Ener Logs Image: The Roll Magic Ener Logs Image: The Roll Magic Ener Logs Image: The Roll Magic Ener Logs Image: The Roll Magic Ener Logs Image: The Roll Magic Ener Logs Image: The Roll Magic Ener Logs Image: The Roll Magic Ener Logs Image: The Roll Magic Ener Logs Image: The Roll Magic Ener Logs Image: The Roll Magic Ener Logs Image: The Roll Magic Ener Logs Image: The Roll Magic Ener Logs	and the second s			Q Search] 8 ? \$ # (
Creade © Linke T1 Activate Selected Record Operativate AP ⊕ 5 ▼ Q, Search ALL ▼ In Name Parent Object Parent Field (Rollup) Child Object Child Field Lookup Field Function Has fitter ? Active Active In Name Parent Object Parent Field (Rollup) Child Object Child Field Lookup Field Function Has fitter ? Active Active In RUM-000261 Contract No of Employee in the Office Employee Record ID Contract COUNT ✓ Image: Contract Image: Contract Contract Contract Contract Contract Contract Contract Image: Contract Image: Contract Contract Contract Contract Contract Image: Contract Image: Contract Contrat Contrat Contrat<		RollUps RollUp Sc	chedule Jobs RollUp Magic Error Logs 🗸					X	
Name Parent Object Parent Field (Rollup) Child Object Child Field Lookup Field Function Has filter ? Active Active RUMA-000201 Contract No of Employee in the Office Employee Record ID Contract COUNT V V V	u RollUps	CANNING THEFT		NAMAN IMENY - I PANS	211 (<i>741</i> , com 1770) 1770	NNN JURIC – JUNS-JUU		311117 - 1338-14 C. 7747	ersalls (7 Nomine Dillion
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	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 🗸 🏹 🐨	RUM-000260	Account	Number Of On Hold Cases	Case	Case ID	Account ID	COUNT	~	
					< < Page 1 of 1 >				



4. Main Features of RollUp Magic:

Parent Object & Field		Child Obj	ect & Relations	hip Field		Aggregate Functi	ion & Child F	ield			Child & Parent Filter	
Step 1: Select Parent Object	Step 7:	Child Filter					Step	8: Parent Filter				
Q Select Parent Object	Condition	Requirements					Condi	ition Requiremen	ts			
Step 2: Select Parent Field or Create New Parent Field	All Co	nditions Are Met(A)	ND)	*			All	Conditions Are	Met(AND)	Ŧ		
Select Parent Parent Parent or <u>Create New Parent Piete</u> O	1	Field	• Ope	rator	*	+ 8	1.	Field	*	Operator	*	
			ope				100					
Step 3: Select Child Object				Valida	ate Query					Vat	idate Query	
Q, Select Child Object					and descend						and four	
Step 4: Select Relationship Field												
Q Select Relationship Field												
Step 5: Select Aggregate Function												
Q Select Aggregate Function												
Step 6: Select Child Field												
Q. Select Child Field												

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	
Q Account	۲
Step 2: Select Parent Field or Create New Parent Field ()	
Q 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.

 \odot

 \odot

Create RollUp			×			
		Create New Parent Field				
Parent Object & Field			- 14		Child & Parent Filter	
Step 1: Select Parent Object	► St					
Q. Account	0 C	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.				
Step 2: Select Parent Field or Create New Parent Field		may not be automatically added, making it crucial to include it where necessary.	D)	v		
Q. Select Parent Field		*Data Type	-	Operator	*	
		Number				
Step 3: Select Child Object Q Select Child Object		*Field Label	1			
Service and order	-	Number Of On Hold Cases				
Step 4: Select Relationship Field	_	*Field Name	- -			
Q Select Relationship Field		number_of_on_hold_cases				
Step 5: Select Aggregate Function		Description				
Q Select Aggregate Function	1	Count of On Hold Cases				
		*Length				
Step 6: Select Child Field		5				
Q. Select Child Field		*Decimal Place	1			
		2				

4.2 Select Child Object and Relationship Field:

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

Step 3: Select Child Object

Q Opportunity

>> Step 4: Select Relationship Field

Q 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	
Q MAX	0
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.

×		\rangle		~			>		\sim		\rightarrow			Child	& Parent Filter	
Step 1: Select Parent Object	0		7: Child Filter								t: Parent Filter					
Step 2: Select Parent Field or Create New Parent			Conditions Are Met(Al	ND)	•						Conditions Are Met(AND)		*			
Step 2: Select Parent Field or <u>Create New Parent</u> Number Of On Hold Cases	Eleid O	1.	Status	• E	Equals	*	On Hold	· ·	⊢ û	1.	Account Fax	*	Not equals to	*		
Step 3: Select Child Object		2	Case ID	- N	Not equals to	*				2.	Account Phone	-	Contains	-	91	
Case	0			- N	Not equals to	•			- =			*	Contains	*	-91	_
Step 4: Select Relationship Field			Filter Logic								Filter Logic					
Account ID	۵		Constructed Query								Constructed Query					
Step 5: Select Aggregate Function			SELECT Id FROM	M Case WHE	ERE Status = 'O	In Hold' /	AND Id != null				SELECT IN FROM A	ccoun	t WHERE Fax != nu	II AND	Phone LIKE '%91%'	
COUNT	ø		Query validated								Query validated					
Step 6: Select Child Field			Query runnanou		-	_	-				Query fundance		0.000	_		
Case ID	0				Valid	late Quen	ly .						Valida	te Quer	¥	



• 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						
	Condit	ion Requirements						
	All C	Conditions Are Met(A	ND)	*				
	1.	Amount	•	Greater than	•	50,000.000	+	Ô
				Valida	ate 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.

~	> ~	>	Child & Parent Filter	
		50 EZ		
Step 1: Select Parent Object	Step 7: Child Filter		Step 8: Parent Filter	
		0	Condition Requirements	
Step 2: Select Parent Field or Create New Parent Field	All Conditions Are Met(AND)	L	All Conditions Are Met(AND)	
), acrikajnių 🚳	1. Field	+ = 1	1. Field V Operator	+
Step 3: Select Child Object				
Q Opportunity Ø	Validate Query		Validate Query	
Step 4: Select Relationship Field				
Q. Account ID				
	2			
Step 5: Select Aggregate Function	1			
	J			
Step 6: Select Child Field	7			
2 Amount ©				

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:

😨 Create	Ti Delete	Selected Record Deactivate All	101			5 V Q Sear	h	ALL	í.	•	C*
Name	Parent Object	Parent Field (Rollup)	Child Object	Child Field	Lookup Field	Function	Has filter ?	2 out o	Edit	i	ctive
RUM-000261	Contract	No of Employee In the Office	Employee	Record ID	Contract	COUNT	~		Run	•	
RUM-000260	Account	Number Of On Hold Cases	Case	Case ID	Account ID	COUNT	~		Schedule	ö	

5.1 View:

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

😰 Create		Selected Record Dea	ctivate All 🔯			5	• Q Search		ALL.	• (*
Name	Parent Object	Parent Field (Ro						Has filter ?	2 out of 2 RollU Active	
RUM-000261	Contract	No of Employee			RollUp Details			~	~ 0	
	UM4-000290 Contract		Name Child Object Child Field Aggregate Function Owner Created Date Last Modified Date	Employee_c Id COUNT Aashutosh Singh 7/12/2024, 2:28 PM 7/12/2	Parent Ogect Parent Field Child object field Kookup for parent Active Created By Last Modified By 1024, 2:28 PM	no_of_employee_in_the_officeC Contractc Asshutosh Singh Asshutosh Singh				
					Eat					



5.2 Edit:

Adjust and customize rollup fields along with their respective filters.

Edit RollUp		1127 - 22										AND	11.10			21127 - NN		
		>	18.2111	~				Ur i	, U	~			>	c	child & I	Parent Filter	2 Z M	
		Step	: Child Filter								Step	8: Parent Filter						
Step 1: Select Parent Object	٥		on Requirements									tition Requirements						
		All	Conditions Are Met(ANI	D)	*						Cu	ustom Condition Logic I	s Met	*				
Step 2: Select Parent Field or Create New Par 2. No of Employee In the Office	rent Field	1.	Availability	-	Equals	*	In The Office		+	-		Billing Country	-	Equals	-	US		+
	0	A.	Avaliaumy		Cdome	_	in the Onice		2.	•	A.	Bining Country		Express		03		1
Step 3: Select Child Object		2.	Salary	*	Greater than	-	5,000.000		+	Ċ	2.	Billing Country	*	Equals	▼ Japan			+
Q Employee	۵		Last Referenced	• 1	Less than equal	*	Jul 12, 20 苗	2:26 PM)+	ŵ	3	Activated Date	-	Greater than equal	-	Jun 1, 20: 首	12:00 AM (
Step 4: Select Relationship Field		а.	Last references	<u> </u>	Less trait equa		00 12, 20 B	2.20 Pm	T		3.	Piceraled Date		Greater than equal	-16	3011 1, 200 E	12.00 mm	J.T
Q Contract	٢		Filter Logic								4.	Activated Date	*	Less than equal	-	Jun 30, 21 📋	12:00 AM (+
Step 5: Select Aggregate Function			1 AND 2 AND 3											<u> </u>				-
2 COUNT	0				Validat							Filter Logic	10.0					٦°
					veriles.	e Quei						Constructed Query	NU 4					
Step 6: Select Child Field	٥												Contra	ct WHERE (BillingCou	ntry = 1	US' OR Billing	country = 'Japan'	٦
	•) AND ActivatedD 29T18:30:00.0002	ate >= 1	ct WHERE (BillingCou 2024-05-31118:30:00.00	DOZ AN	D ActivatedDate	e <= 2024-06-	
												Query validated						

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.

RollUps				Error! Parent Field Test_C	Opportunity_Numberc is not av	aliable X				
😢 Create		Selected Record	ictivate All				5 🔻 🗙 Q. Search	ALL		•
Name	Parent Object	Parent Field (Ro						Has filter ?	2 out of 3 RollU Active	
RUM-000262	Account	Number Of Oppo			RollUp Details					
RUM-000261	Contract	No of Employee	RollUp Field Name	RUM-000262	Parent Object	Account	-	~		
RUM-000260	Account	Number Of On H	Child Object	Opportunity	Parent Field	Test_Opportunity_Numberc	-	~	0	
			Child Field	Employees_Numberc	Child object field lookup for parent	AccountId	_			
			Aggregate Function	AVG	Active	×	-			
			Owner	Aashutosh Singh	Created By	Aashutosh Singh				
			Created Date	7/12/2024, 3:23 PM	Last Modified By	Aashutosh Singh				
			Last Modified Date	7/12/2024	. 3:23 PM					



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.

			(m)			5 💌 🔍 Searc	h ALL		
😰 Create		Selected Record Deactivate All	\$			5 V Q Searc			• (
Name	Parent Object	Parent Field (Rollup)	Child Object	Child Field	Lookup Field	Function	Has filter ?	2 out of 2 RollU 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	~		
				Cancel	к				

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.

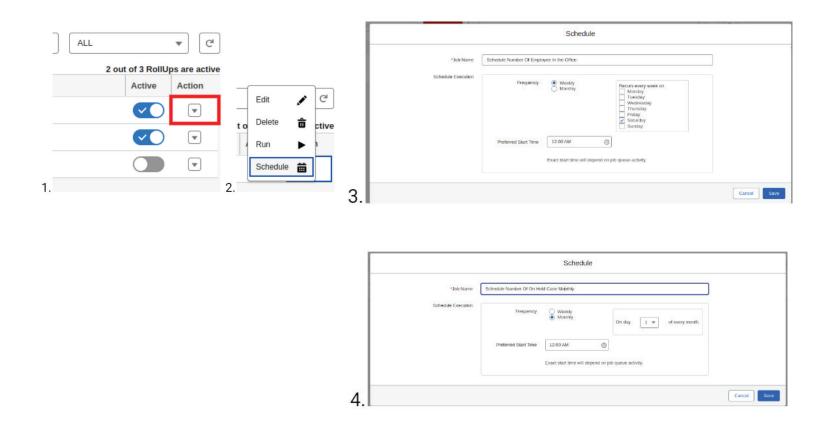
8	Create 🔒 f	Delcte 11 Activate	Selected Record Deactivate All	\$			5 💌 Q Sear	ch 🛛	ALL		•
N	lame	Parent Object	Parent Field (Rollup)	Child Object	Child Field	Lookup Field	Function	Has filter ?	1 out o	Edit	-
R	RUM-000261	Contract	No of Employee In the Office	Employee	Record ID	Contract	COUNT	~		Run	
R	RUM-000260	Account	Number Of On Hold Cases	Case	Case ID	Account ID	COUNT	~		Schedule	i



u RollUps			Success The value	s! s of the Rollup field have been up	dated for all records.				
					- A COMONA				
									_
😰 Create	Delete Activate S	Selected Record Deactivate All	韓			5 V Q Searc	ALL		٣
								1 out of 2 RollUp	os are a
					Lookup Field	Function			
Name	Parent Object	Parent Field (Rollup)	Child Object	Child Field	Lookup Heid	Punction	Has filter ?	Active	Actio
 Name RUM-000261 	Parent Object Contract	Parent Field (Rollup) No of Employee In the Office	Child Object Employee	Record ID	Contract	COUNT	Has filter ?	Active	Actio

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.

				Refresh
RUM-000261 - Contract > no_of_employee_in_the_office				
lob Name (SRUM - Schedule Number Of Employee In the Office	Scheduled Time July 12, 2024 at 03:06 PM	Previous Fire Time	Next Fire Time July 13, 2024 at 12:00 AM	Action
RUM-000250 - Account > number_of_on_hold_casesc				
lob Name	Scheduled Time	Previous Fire Time	Next Fire Time	Action
SRUM - 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.

Dalling							
u RollUps							
			~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~			$\sim \sim 1 \sim 100$	
<b>0</b> (mark)	🕆 Delete 🏾 🏦 Activate Sel	ected Record Deactivate All					
Create	Delete     12 Activate Set	Deactivate All			10 V Q E	Enter Something	Choose Aggregate F
							6 out of 7 RollUp:
Name	Parent Object	Parent Field (Rollup)	Child Object	Child Field	Lookup Field	Function	Active
RUM-001512	Account	test field currency	Contact	Contact ID	Account ID	COUNT	$\checkmark$
RUM-001511	Account	Max opp price	Account	Annual Revenue	Master Record ID	AVG	
RUM-001510	Account	LoopNumber	Account	Billing Latitude	Master Record ID	AVG	
-	Account	CheckRollUpDate	Account Contact Role	Created Date	Account ID	MAX	
RUM-001509	Account	Number of active contacts	Contact	Contact ID	Account ID	COUNT	
RUM-001509			Opportunity	Amount	Account ID	AVG	
_	Account	Average Opportunity amount	opportunity	Contraction in the second seco			



II RollUps									_
😰 Create	a Delete	Selected Record Deactivate All	*			5 🔹 🔍 Q Search	AL		•
Name	Parent Object	Parent Field (Rollup)	Child Object	Child Field	Lookup Field	Function	Has filter ?	1 out of 2 RollUp 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	~		-
			You are	e about to deactivate all	active roll ups.				
				Cancel OK					

- 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.

😰 Create	Delete     Activate	Selected Record Deactivate All	\$			5 💌 🔍 Q Sear	ch Al		•
Name	Parent Object	Parent Field (Rollup)	Child Object	Child Field	Lookup Field	Function	Has filter ?	1 out of 2 RollUp Active	Actio
RUM-000261	Contract	No of Employee in the Office	Employee	Record ID	Contract	COUNT	~	<b>~</b> 0	
RUM-000260	Account	Number Of On Hold Cases	Case	Case ID	Account ID	COUNT	~		
			You	Cancel					



### 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.

U RollUps					S				
Create	â Delete 11 Activate	Selected Record Deactivate All	\$			5 🔻 🔍 Searc	h AL		• @
Name	Parent Object	Parent Field (Rollup)	Child Object	Child Field	Lookup Field	Function	Has filter ?	1 out of 2 RollU Active	
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	~		
			Ye	ou are about to delete th	ese RollUps.				
			NOTE: Deleting these	rollup fields will result in the deletion o	of all related schedule jobs as well.				
				Cancel OK					

**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.

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RollUp Magie	RollUps RollUp Sched	iule Jobs — RollUp Magic Error Logs 🗸		STREET LINES		UST STANK	$\sim m \sim r$		WE LINN	5 11	
II RollUps											
				14-53152						$\sim$	~
2 Create	T Delete	elected Record Deactivate All				5	• Q Search		ALL		*
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Name	Parent Object	Parent Field (Rollup)	Child Object	Child Field	Lookup Field	Func	5	Has filter ?	34 ou	Active	
Name RUM-007575	Parent Object	Parent Field (Rollup) new field operation	Child Object Opportunity	Child Field Probability (%)	Lookup Field Account ID	Func	5 10 20	Has filter ?	34 ou	1	Act
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RUM-097575	Account	new field operation	Opportunity	Probability (%)	Account ID	MAX	20	Has filter ?	34 ou	Active	Act
RUM-097575	Account	new field operation	Opportunity Opportunity	Probability (%) Created Date	Account ID Account ID	MAX MAX	20 50	Has filter ?	34 out	Active	Jps an Acti ( (



## 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

14V	L		5 V Q Search		\$	e Selected Record Deactivate All	Delete	😰 Create
14V		Has filter ?	Function	Lookup Field	Child Object Child Field	Parent Field (Rollup)	Parent Object	<ul> <li>Name</li> </ul>
MAX	COUNT	~	COUNT	Contract	Employee Record ID	No of Employee in the Office	Contract	RUM-000261
10260 Account Number Of On Hold Cases Case Case ID Account ID COUNT 🗸	MAX	~	COUNT	Account ID	Case Case ID	Number Of On Hold Cases	Account	RUM-000260
Allow Allo			COOT	PLOUR ID	Citor L	Mailler Of On Floor Cables	Automa	Them exected

## 12. Configuration Widget Layout:

• Gear Icon: Click to access the Configuration Widget Layout.

Round			Q Search	
RollUp Magic	RollUps RollUp Schedule Jol	bs RollUp Magic Error Logs 🗸		
u RollUps				THE THE
€ Create 💼 🖬	Delete	Record Deactivate All	\$	
Name Name	Parent Object	Parent Field (Rollup)	Child Object	Child Field
RUM-000262	Account	Number Of Opportunity	Opportunity	Employees Number



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P Create	💼 Delete 🚺 Activate	Selected Record Deactivate All	\$			5 💌 🔍 Search	AI	u	•
								1 out of 2 RollU	
Name	Parent Object	Parent Field (Rollup)	Child Object	Child Field	Lookup Field	Function X	Has filter ?	1 and the second	Action
RUM-000261	Contract	No of Employee Provide Article		Configuration W	lidget		~	<b>~</b> 0	
RUM-000260	Account	Number Of On H		ger en er			~		
		Email to s	end exception						
		rollup@	9ksolves.com						
		🖬 Вур	ass Validation Rule						
		snippet	to the end of the contents of the	r. For each validation rule that you w Error Condition Formula section of th c.KSRUMRun_Validation_Rule(	ould like Rollup Magic to ignore, please he validation rule c	e add this code			

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

Configuration Widget	
Email to send exception	
✓ Bypass Validation Rule ● You have enabled Validation Rule Helper. For each validation rule that you would like Rollup Magie snippet to the end of the contents of the Error Condition Formula section of the validation rule && \$Setup.KSRUM_System_Setting_c.KSRUM_Run_Validation_Rule_c	c to ignore, please add this code
	Cancel Save



• **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

Email to send exception  rollup@ksolves.com Bypass Validation Rule	
You have enabled Validation Rule Helper. For each validation rule that you would like Rollup Magic to ignor snippet to the end of the contents of the Error Condition Formula section of the validation rule && \$Setup.KSRUM_System_Setting_c.KSRUM_Run_Validation_Rule_c	e, please add this code

## 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!