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.
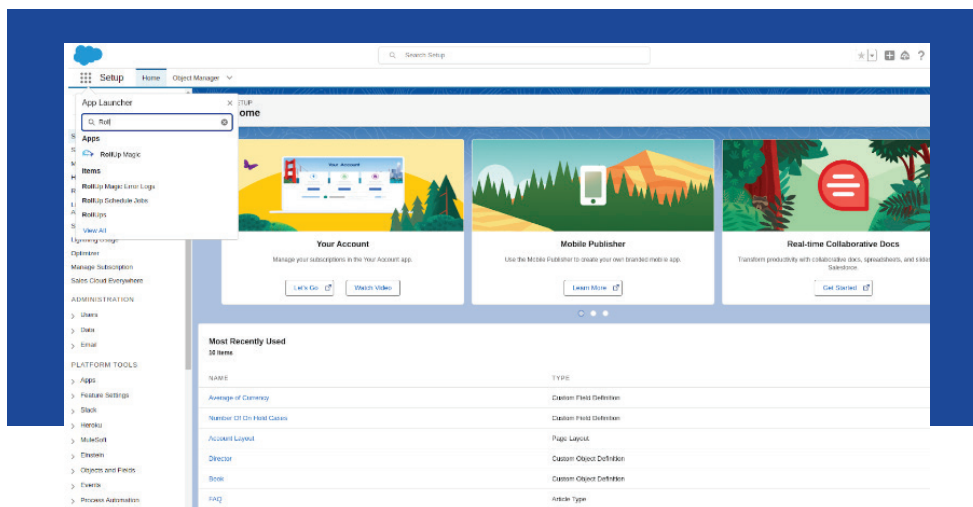
Features Guide

Unlock the potential of your creativity with RollUp Magic as we dive into its captivating features. Let's embark on this journey together!
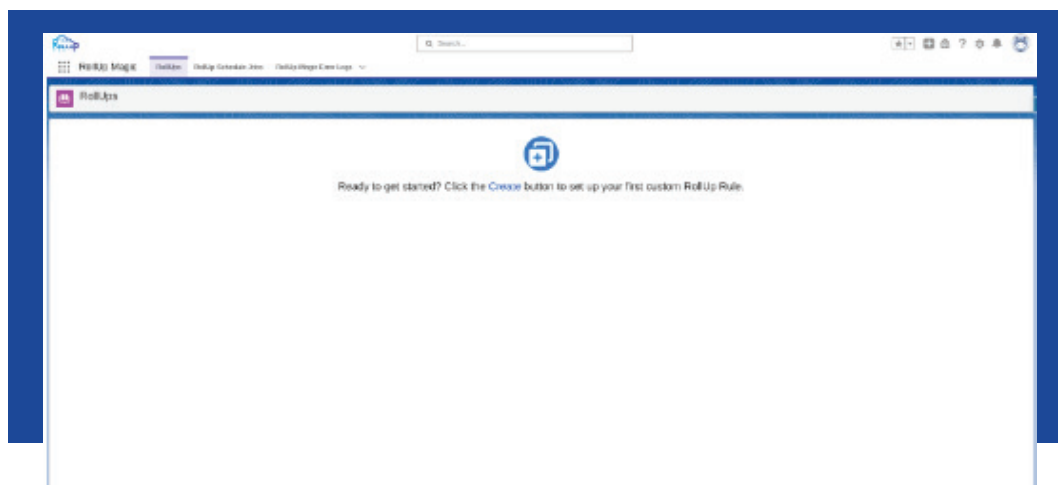
1. Launch Application:

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.

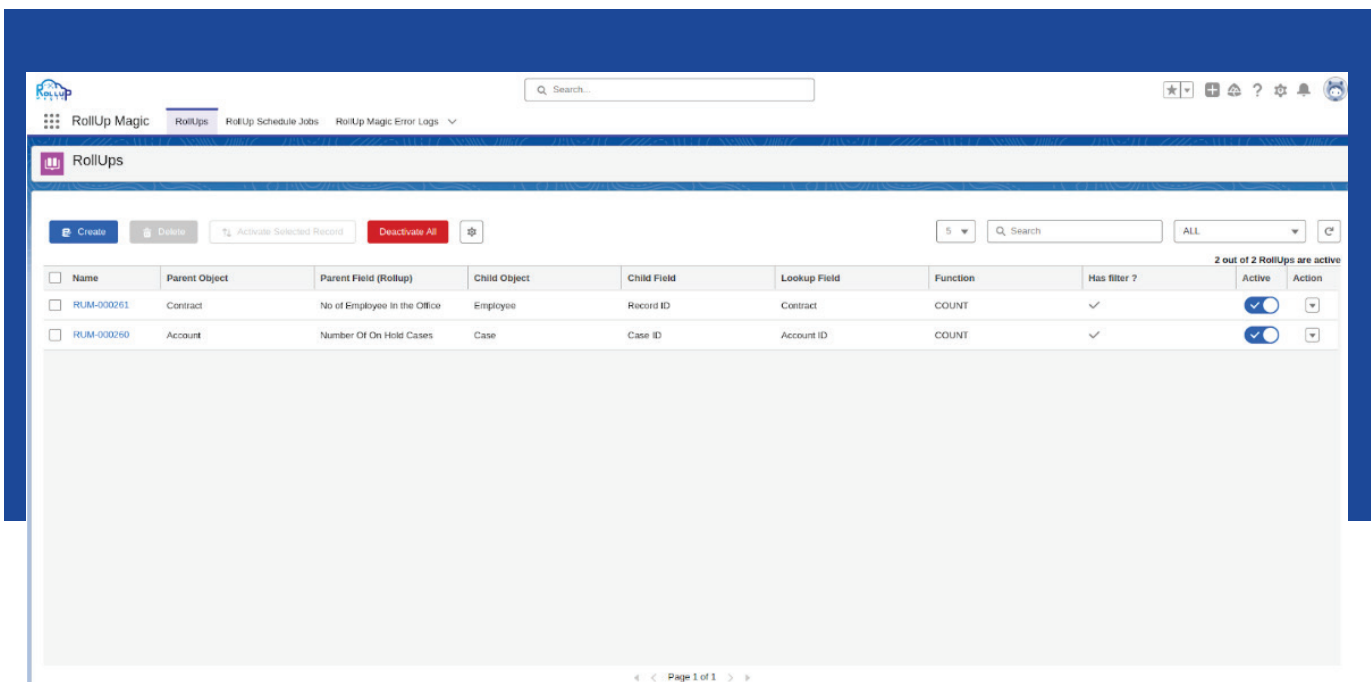## 3. Main Features of RollUp Magic:

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.

4. Main Features of RollUp Magic:

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.

- If no fields are currently available on the parent object, proceed by creating a new custom field directly on the parent object.

4.2   Select Child Object and Relationship Field:

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

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.

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.
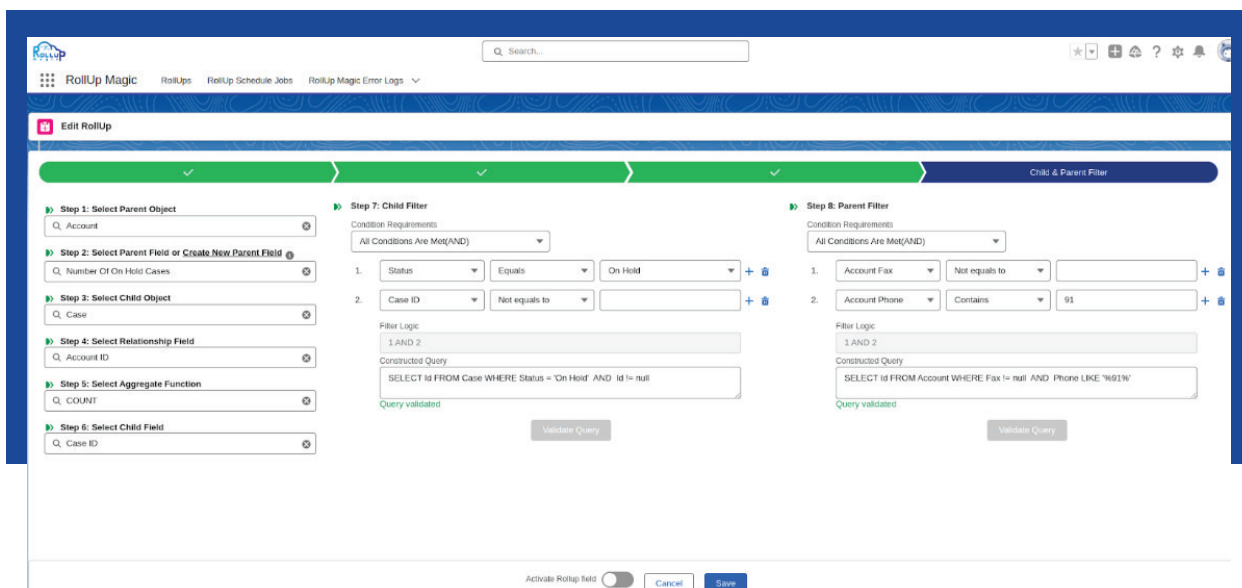
- Select The Conditional Requirement:

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

Condition Requirements

| All Conditions Are Met(AND) ▼ |

| 1. | Amount ▼ | Greater than ▼ | 50,000.000 | + 🗑 |

[Validate 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.

After saving, the RollUp field will be listed in the Rollup tab's data table for easy access.
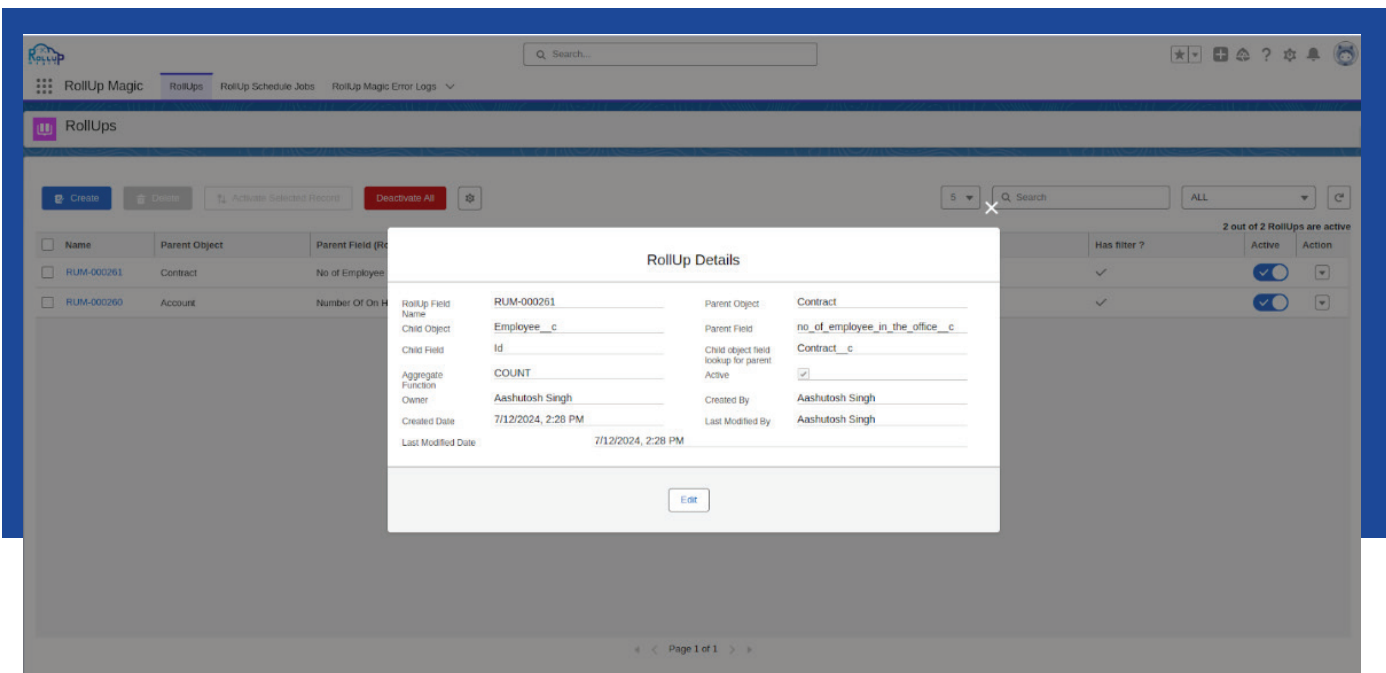
5 . RollUp Action Buttons:

Each RollUp offers 5 action buttons in the dropdown menu:
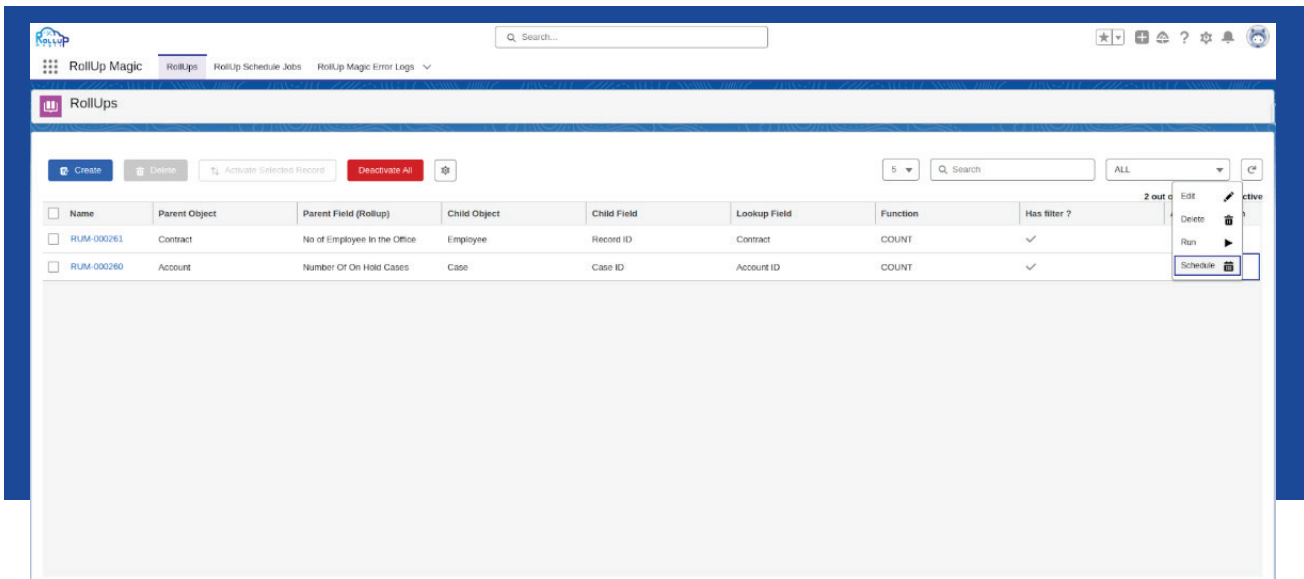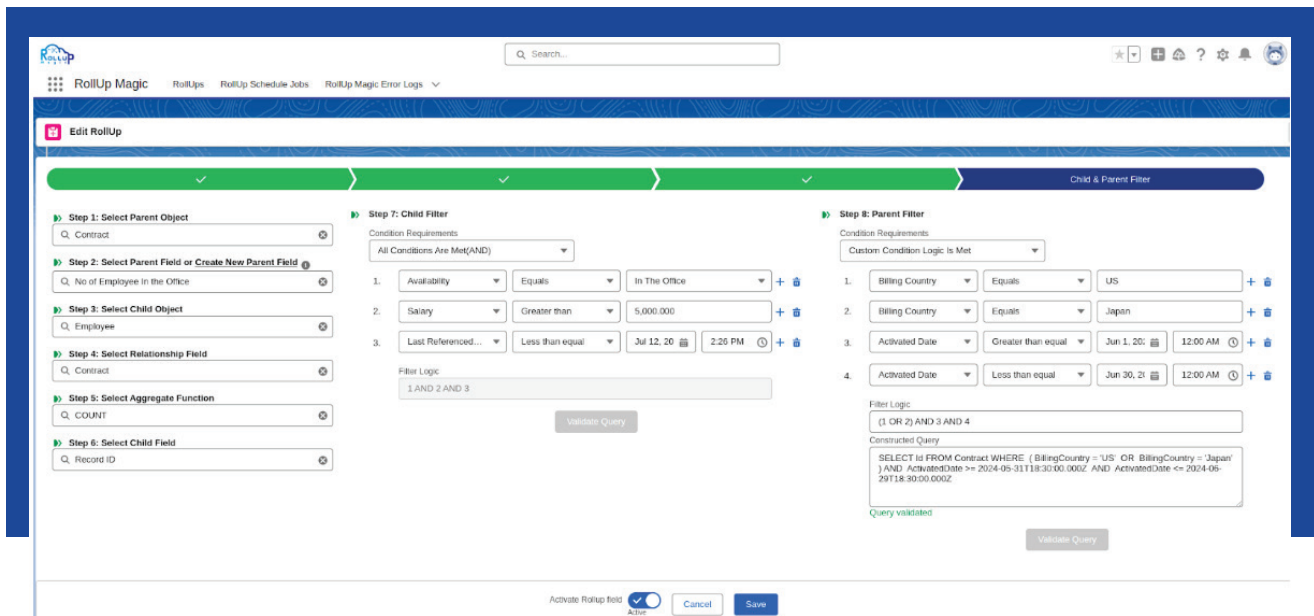

5.1   View:

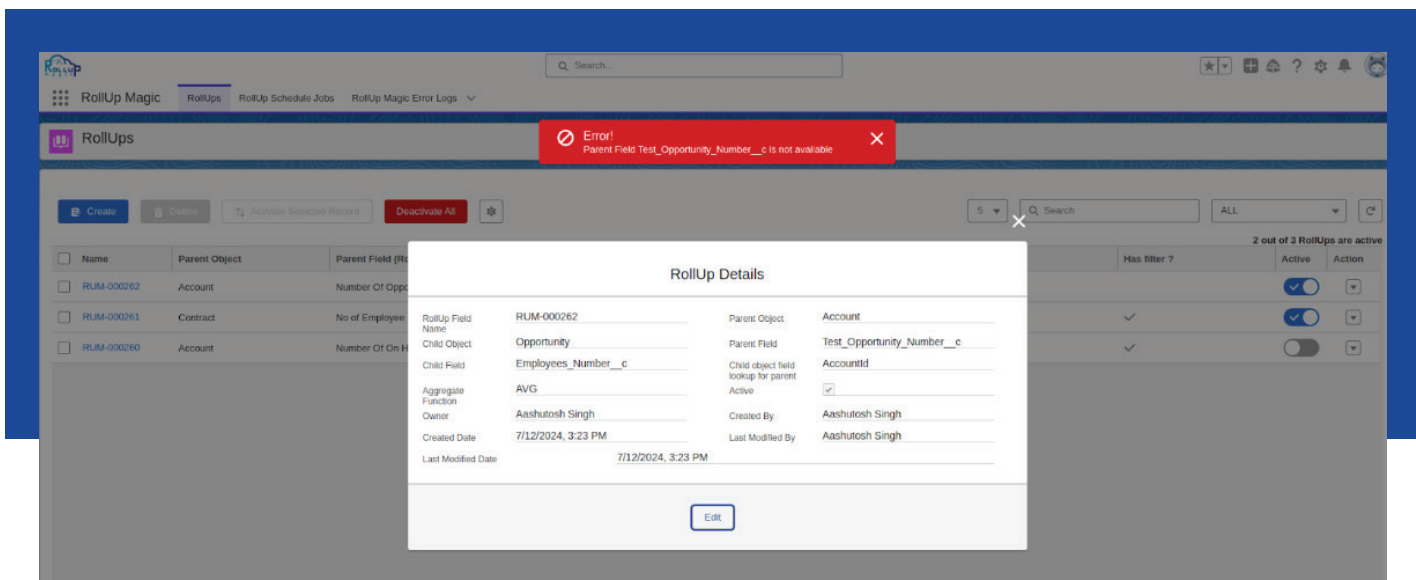When the user clicks on the "Name" in the RollUp data table, the RollUp detail page will open.

5.2 Edit:

Adjust and customize rollup fields along with their respective filters.

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.

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.
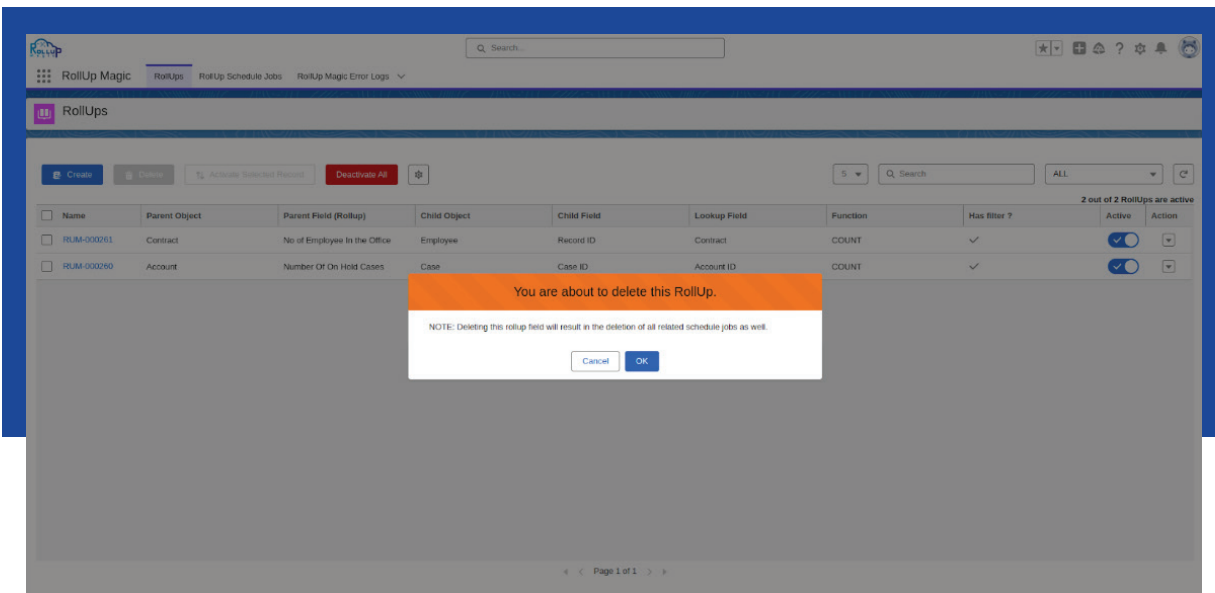
5.4   Run:

Manually trigger the rollup process for immediate execution, updating the selected rollup field for all records promptly.
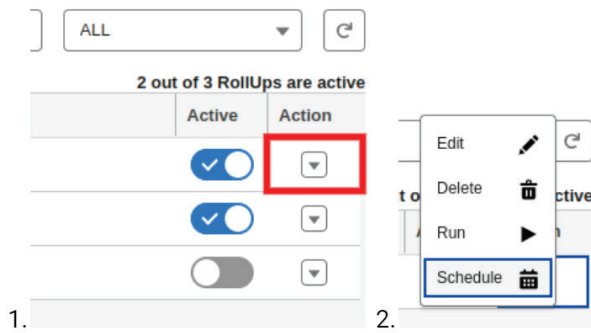
Note: The "Run" action will work only with the active Rollup fields.
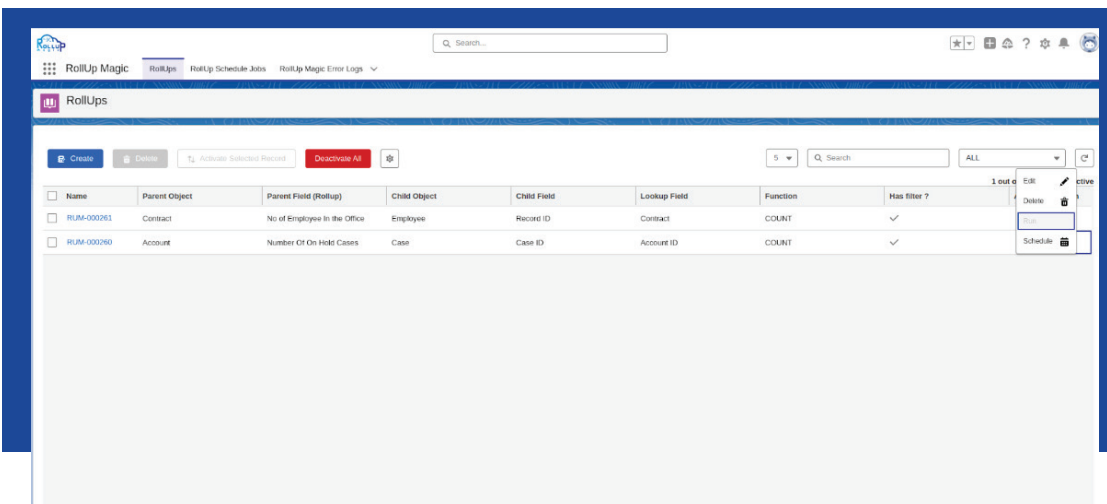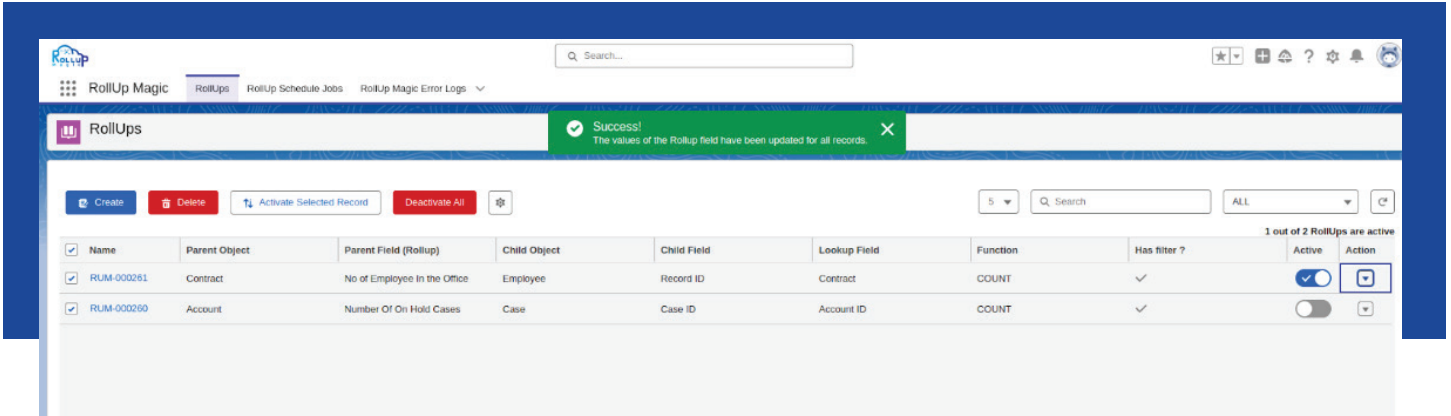
5.5   Schedule:

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.
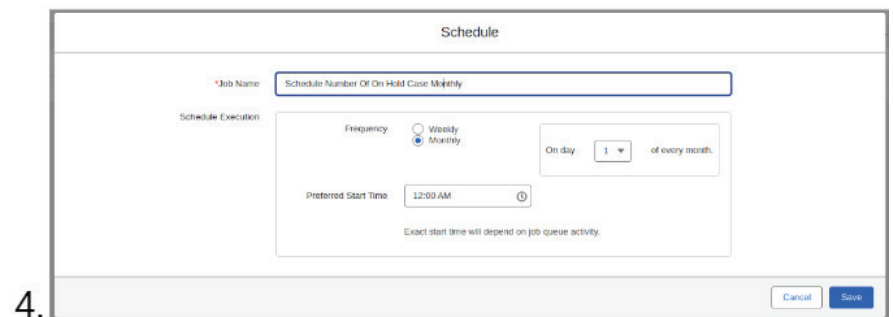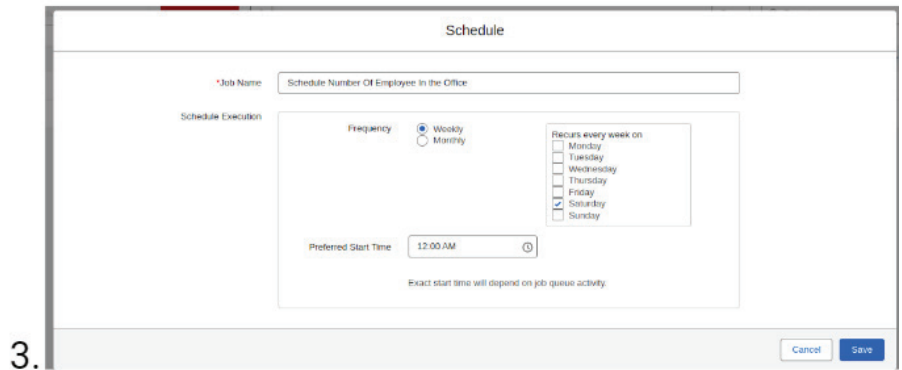
6. Layout of Schedule Roll Up Jobs:

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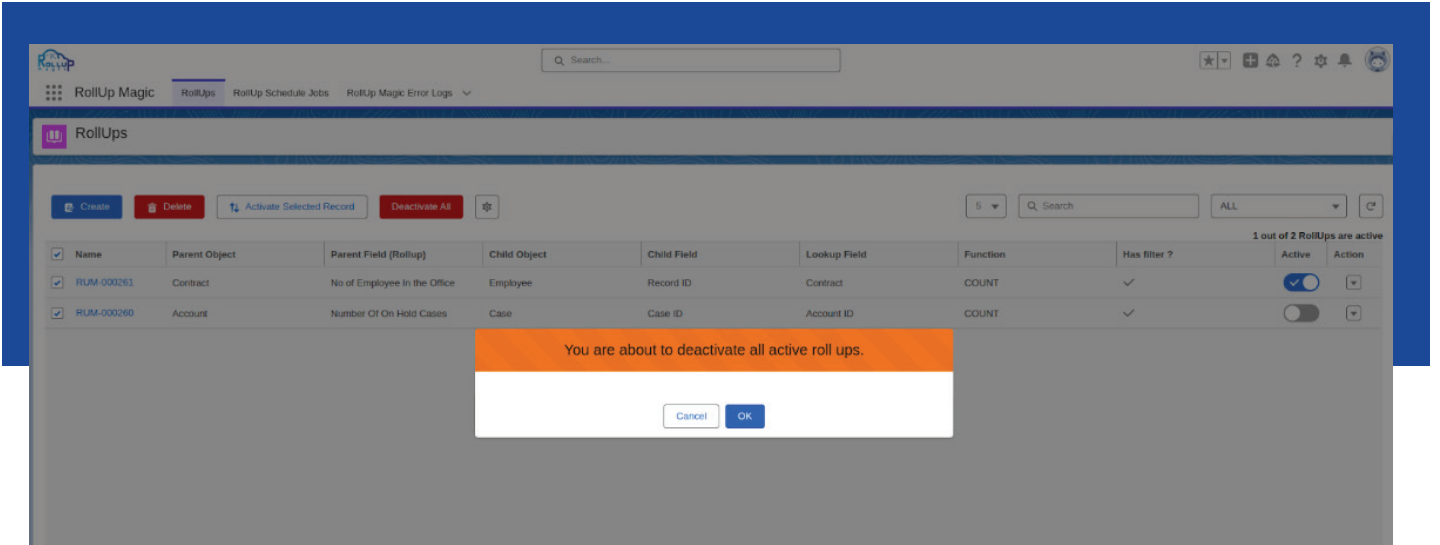

7. Deactivate All RollUp Records:

- Utilize the "Deactivate All" feature for mass deactivation multiple RollUps at once.

Note: This button becomes enabled when any of the RollUps are activated.

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.
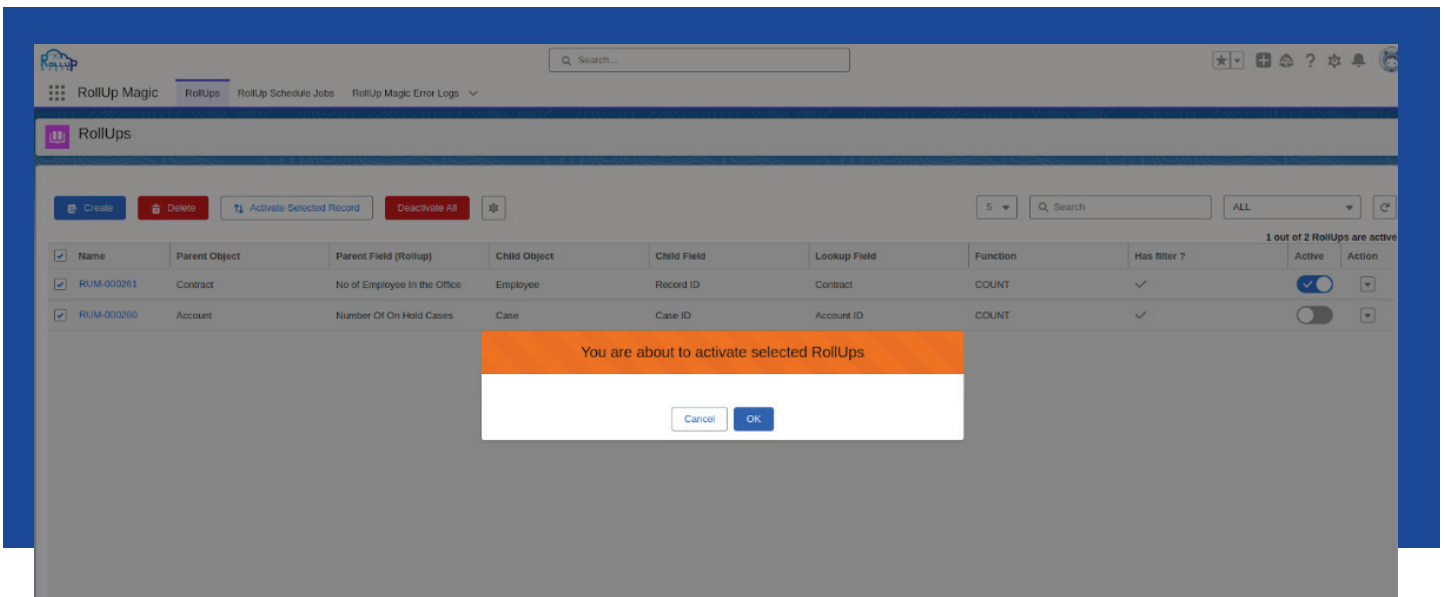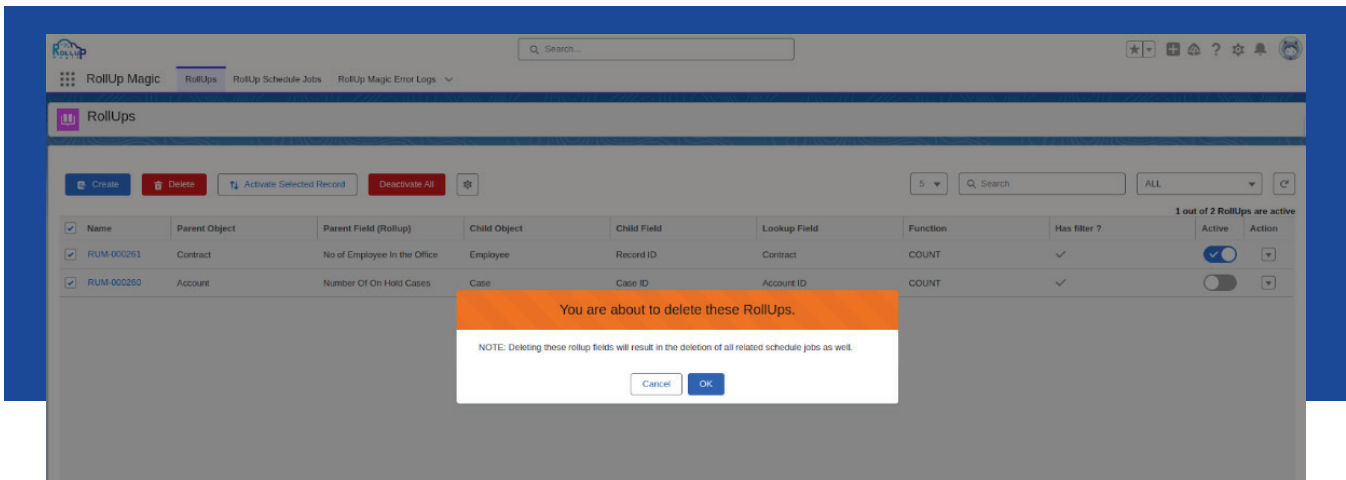
9. Delete RollUp Records:

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.



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.

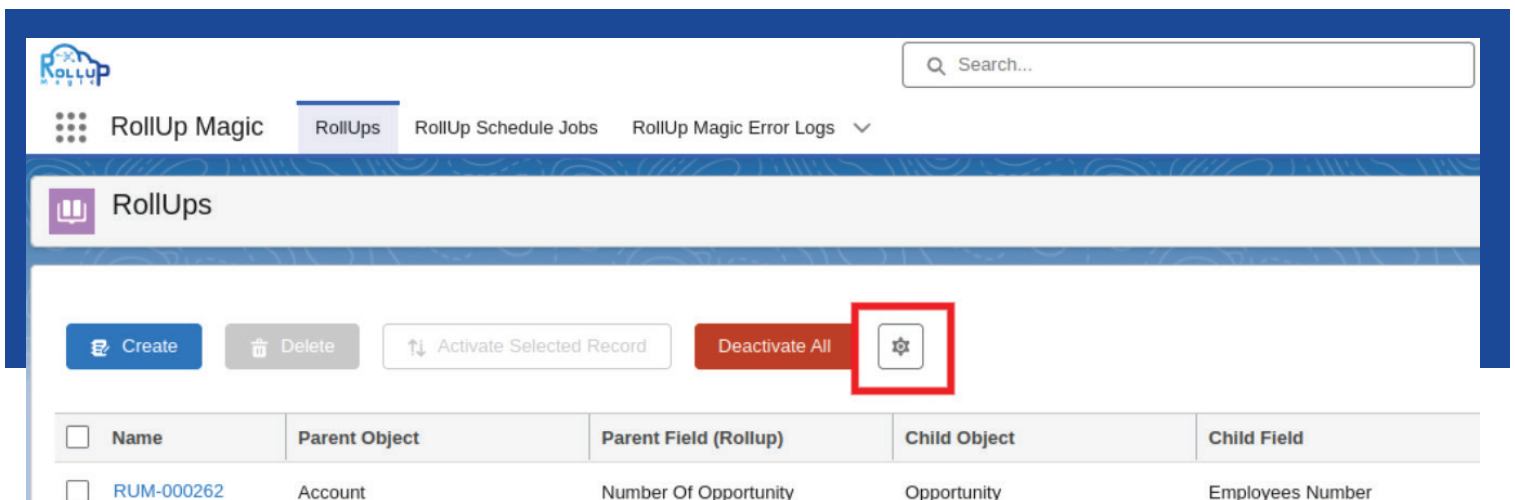• Customize the display to align with your preferences for an optimal viewing experience.
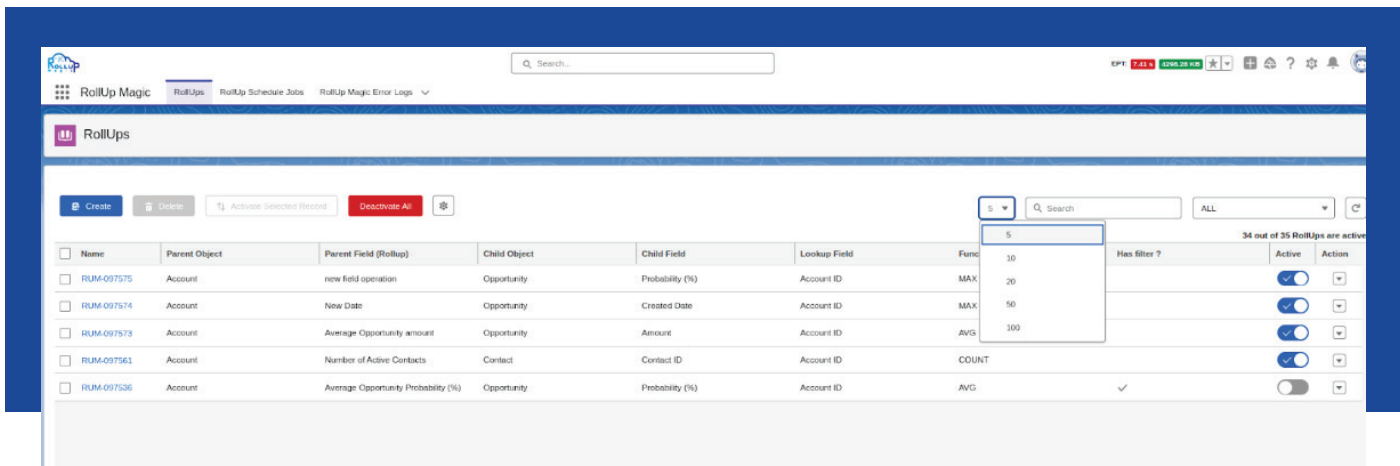
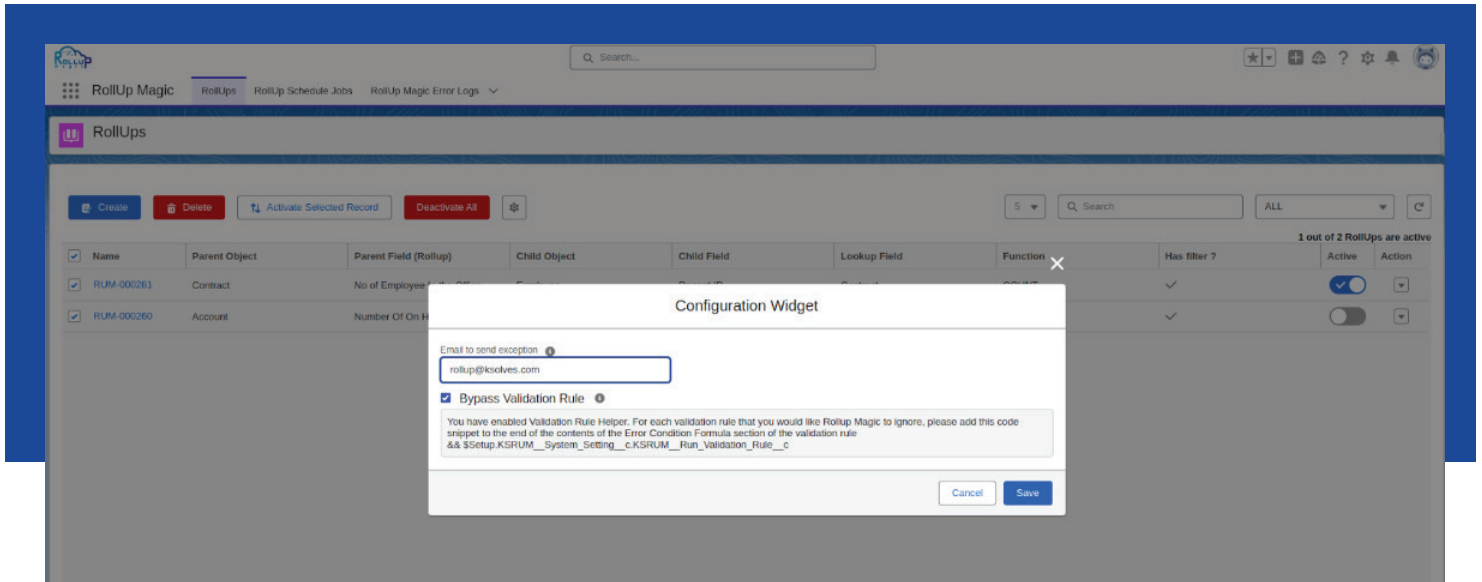## 11. Filter By Function:

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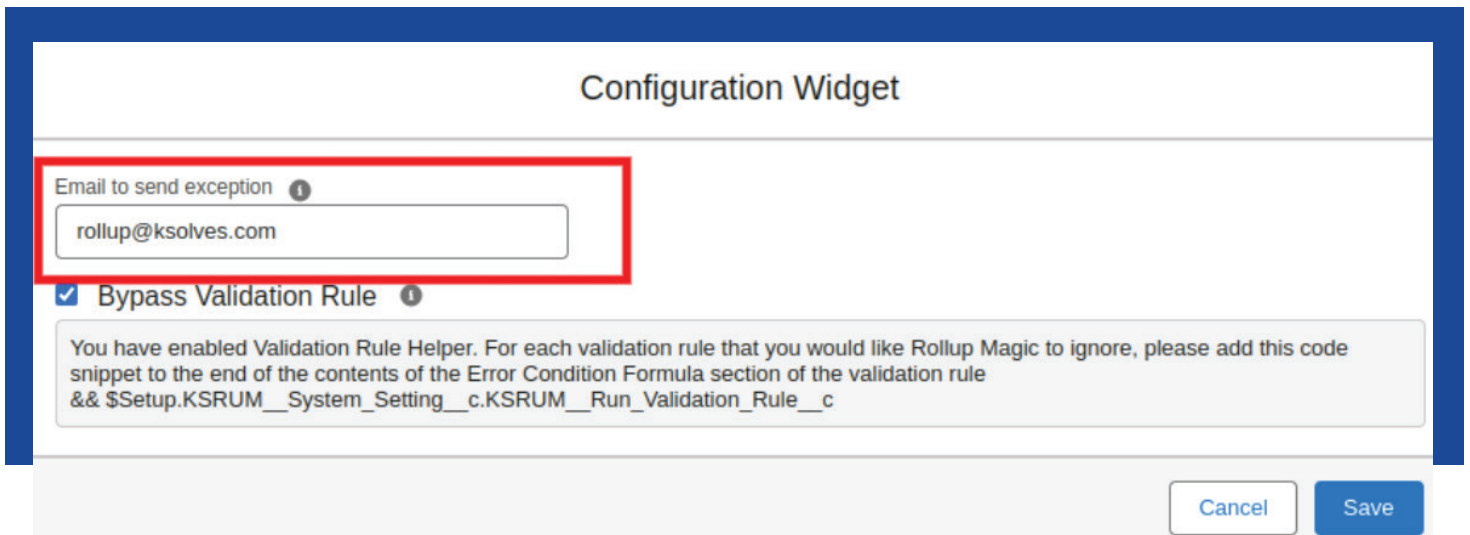- Available functions include: AVG, COUNT, MAX, MIN, and SUM
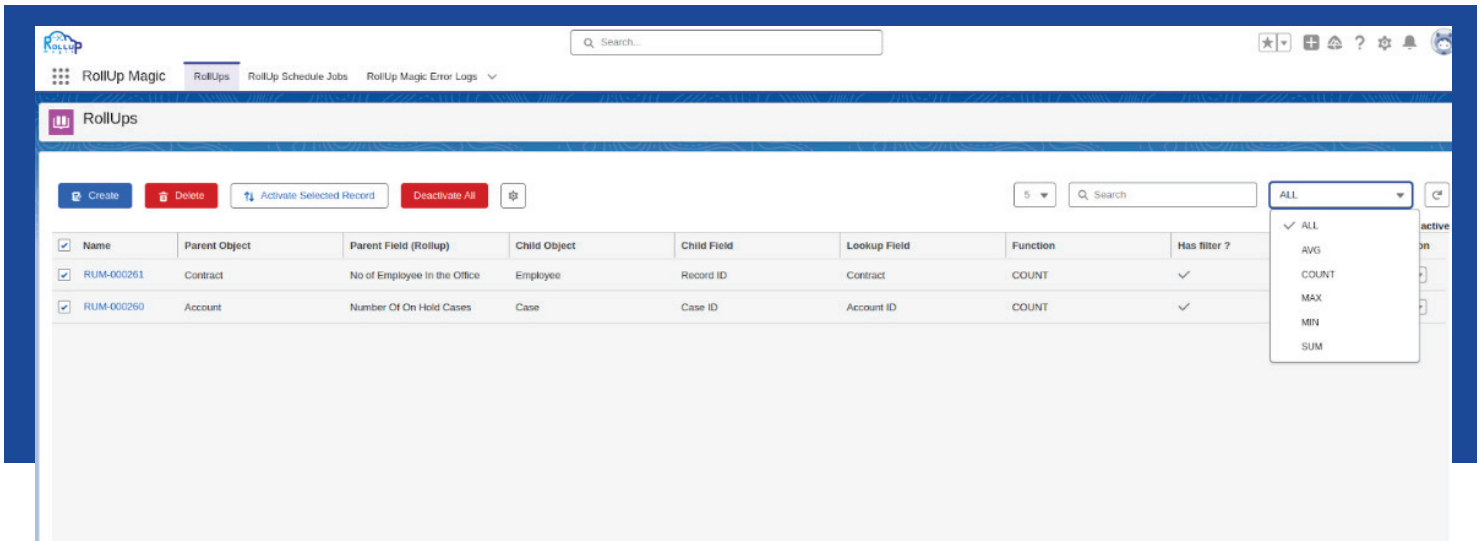
12. Configuration Widget Layout:

- **Gear Icon:** Click to access the Configuration Widget Layout.

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

- **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

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!