



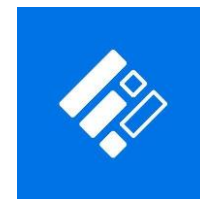
Thinking Through Rollup Scenarios with Customizable Rollups

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SERCANTE

Intro to me

- My Salesforce story
- Arkus
 - Education & Enablement
 - Arkus Blog: <https://www2.arkusinc.com/subscribe>
- Philosophy on approaching a problem with Salesforce as a tool
 - Why before How
 - Simplicity & Sustainability

PS: We're hiring...

Session Outline

1. Rollups Background
2. Customizable Rollups Structure & Concepts
3. Use Case Thought Process
4. Example Use Cases (Demo Time)
5. YOUR Use Cases (Hands On)

Rolling Things Up

1. Salesforce Rollup Summary Fields
2. Legacy NPSP Rollups & User Defined Rollups
3. Customizable Rollups
4. DLRS, Flows, etc.

New to CR? Resources:

<https://powerofus.force.com/s/article/NPSP-Cust-Rollups-Overview>

<https://powerofus.force.com/s/article/NPSP-Before-Enable-Cust-Rollups>

<https://powerofus.force.com/s/article/NPSP-Enable-Cust-Rollups>

Customizable Rollups Structure

Filter Group

- Set of Filter Rules
 - Object
 - Field
 - Operator
 - Value
- Evaluate with AND logic
- Use across multiple Rollup Definitions



Rollup Definition

- Target Object
- Target Field
- Operation
- [Time Frame]
- Rollup Type
- [Field to Roll Up]
- [Date Field]
- [Amount Field]

Filter Group: Filter Rules

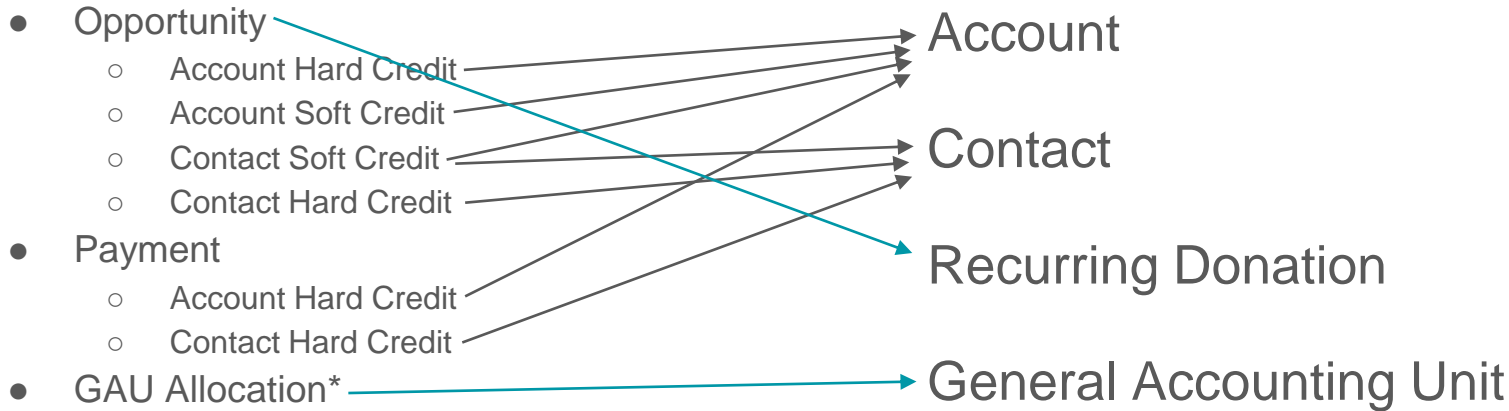
- Object
 - Opportunity
 - Payment
 - GAU Allocation
 - Account Soft Credit (literal)
 - Contact Soft Credit (Opportunity Contact Role/Partial Soft Credit)
- Field + Operator + Value
 - Think Like a Report
- Caution
 - Rules can be 'ignored' if don't apply to rollup type

Reference: <https://powerofus.force.com/s/article/NPSP-Create-Filter-Group>

Rollup Definition: Target/Rollup Type

Detail Object (Source)

Target Object (Destination)



*Allocation or Opportunity fields

Customizable Rollups: Credit Types

- Account Hard Credit
 - Account field on Opportunity
- Account Soft Credit
 - Account Soft Credit object
- Contact Soft Credit
 - Contact Roles (include role values in Filter Group criteria)
 - Partial Soft Credits
 - When rolling up to Account, deduplicates
- Contact Hard Credit
 - Primary Contact on Opportunity w/ Household Account

Rollup Definition: Operations & Field Choices

Example: Map to a Currency field

	Field To Roll Up	Amount Field	Date Field
Smallest	Currency	Currency/Number	If not "All Time"
Largest	Currency	Currency/Number	If not "All Time"
First	Currency	---	Always
Last	Currency	---	Always
Sum	[Amount Field]	Currency/Number	If not "All Time"
Average	[Amount Field]	Currency/Number	If not "All Time"
Best Year Total	[From Date Field]	Currency/Number	Defines "Year"

Rollup Definition: Time Concepts

- All Time
 - Dates for ordering only
- Days Back
 - A literal number
 - Inclusive from 'today'
- Years Ago
 - Can use Fiscal Year
 - This/Last/2-20

Use Case Thought Process

Why do I need this rollup?

Where does the information I want live in Salesforce?

Where do I want to see this information?

Does this match a rollup type?

If not, can I move some data (before/after) so it will? [and should I]

Configuration Plan

1. Map it out
2. Use a Sandbox
3. Create Target Field
4. Build “tangentials”
5. Filter Group
6. Rollup Definition
7. Test
8. Deploy

Example Use Case

#1: I consider family foundation and donor advised fund giving different from other soft credits, but still not a hard credit, and thus want to segment and report on this separately from both other soft credits and hard credits for a Contact.

- Decision flow
- Configuration plan
- Demo

Example Use Case

#2: I want to know what an account or contact has committed to donate, but not yet given. I consider opportunities committed when closed won, but also have a pre-won stage I consider committed for this purpose. I use payments to track received funds.

- Decision flow
- Configuration plan
- Demo

Example Use Case

#3: I receive foundation funding tracked in grant opportunities that may be allocated to more than one GAU. The total grant amount is allocated when the agreement is finalized, but not all the funds are immediately released. My programs team needs to know how much is released to a GAU, while fundraising needs to know the totals. I track if funds are released in a custom status field on the GAU Allocation.

- Decision flow
- Configuration plan
- Demo

What's your use case?

Let's try to build it, together!

- Decision flow
- Configuration plan
- Hands-on build

Thank you for coming



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