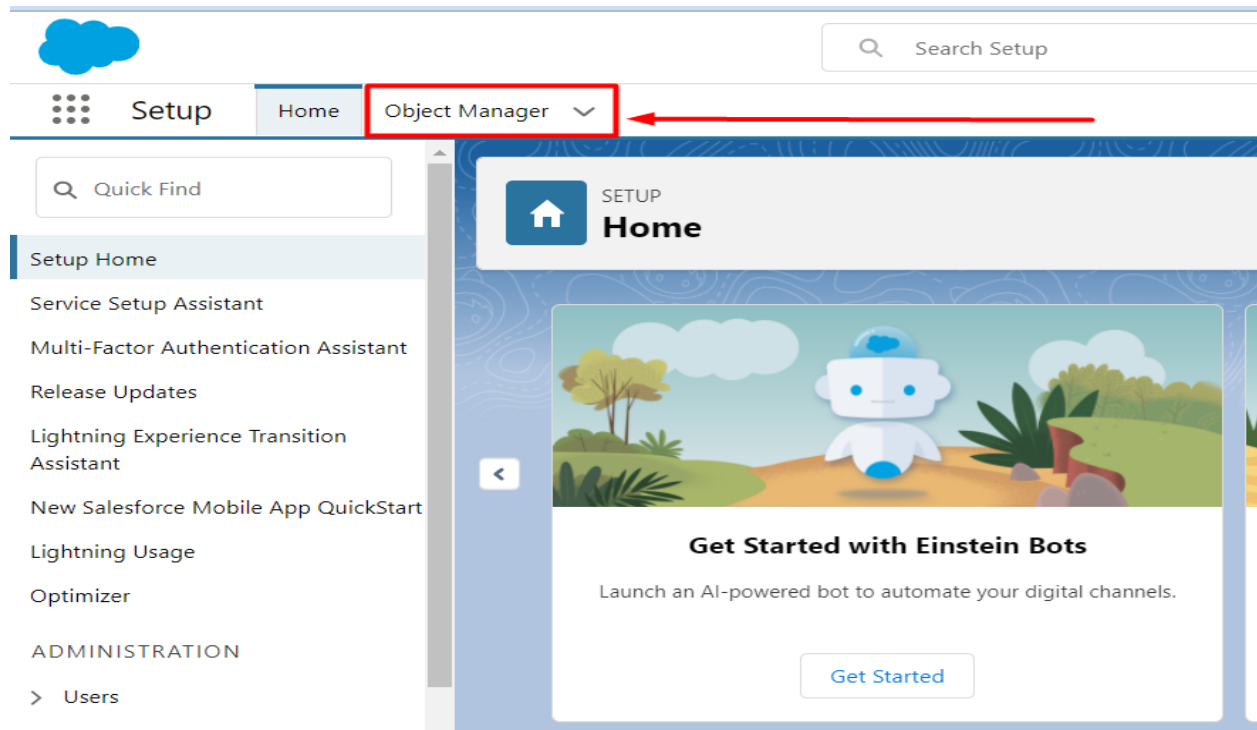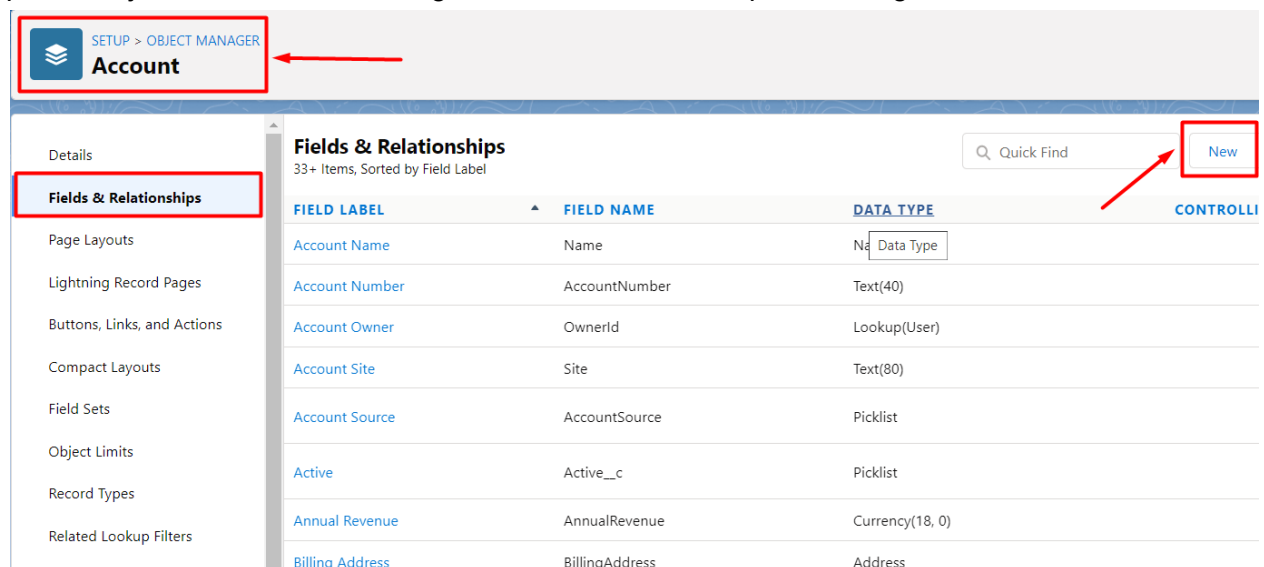## Lecture 1: Exploring rollup summary field:

When we implement a master detail relationship in that case salesforce provides one more feature that is called rollup summary. Rollup summary basically means that we can roll up our child records with parent records. In case of master detail relationship we need to create a field on child record but in case of rollup summary we need to create on parent record.

Step 1: First step is to click on the tab object manager available on the home page.

Step 2: So in our previous lecture we created a master-detail relationship between account and college where account is parent record and college is child record.So I will be opening the parent object account and clicking on field and relationship and hitting new.

Step 3: As you click on new you will be directed to the next page where you can see that rollup summary option is available. You have to click on it and press next.

Account
New Custom Field

Step 1. Choose the field type

Specify the type of information that the custom field will contain.

Data Type

○ None Selected — Select one of the data types below.

○ Auto Number — A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

○ Formula — A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

● Roll-Up Summary — A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

○ Lookup Relationship — Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup source of the values in the list.

○ External Lookup Relationship — Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Step 4: So in this lecture I am putting the field label as counts of the number of colleges.and hit next

Step 2. Enter the details

Field Label [ ] i

Field Name [ ] i

Description [ ]

Help Text [ ] i

Auto add to custom report type ☑ Add this field to existing custom report types that contain this entity i

Step 5: So as you click on next the step is to define the summary calculations.In this step you will be able to see rollup type, object to summarise and criteria.as you go to the summarised objects and click on the available dropdown you will see the names of the child records available. Click on any one and move to the next step rollup type in this lecture we are selecting counts and selecting criteria as all records.

Step 3. Define the summary calculation

Select Object to Summarize

Master Object	Account
Summarized Object	Entitlements ▾

Select Roll-Up Type

- ◉ COUNT
- ○ SUM
- ○ MIN   Field to Aggregate --None-- ▾
- ○ MAX

Filter Criteria

- ◉ All records should be included in the calculation
- ○ Only records meeting certain criteria should be included in the calculation

Step 6: As you move next the fourth step is to select field level security so in this case i am selecting visible to all the profiles you can select as per your requirements.as you click on visible read only option will be selected by default as rollup summary field is always read only.

Step 4. Establish field-level security

Field Label	counts of colleges
Data Type	Roll-Up Summary
Field Name	counts_of_colleges
Description	

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	☑ Visible
Analytics Cloud Integration User	☑
Analytics Cloud Security User	☑
Authenticated Website	☑
Authenticated Website	☑
bgbb	☑
Contract Manager	☑
Cross Org Data Proxy User	☑
Custom: Marketing Profile	☑

Step 7: Next step is to choose a page layout so here our selected object "account" have four layouts,and after selecting click on next.

Step 8: So if we search for the field count you can see it is available and its datatype is a rollup summary and it will count the number of colleges.

Step 9: So now as you click on app launcher and search for a sales application and click on the account and then click on detail you will be able to see that the count number of the college field is available and it is blank.

Step 10: Now let's create a new college under this account so I am clicking on the college tab and filling up the details.

Step 11: As you click on see you can see that one college is associated with this account now and as you move to the detail page you will see that the count number of college is now showing as 1.