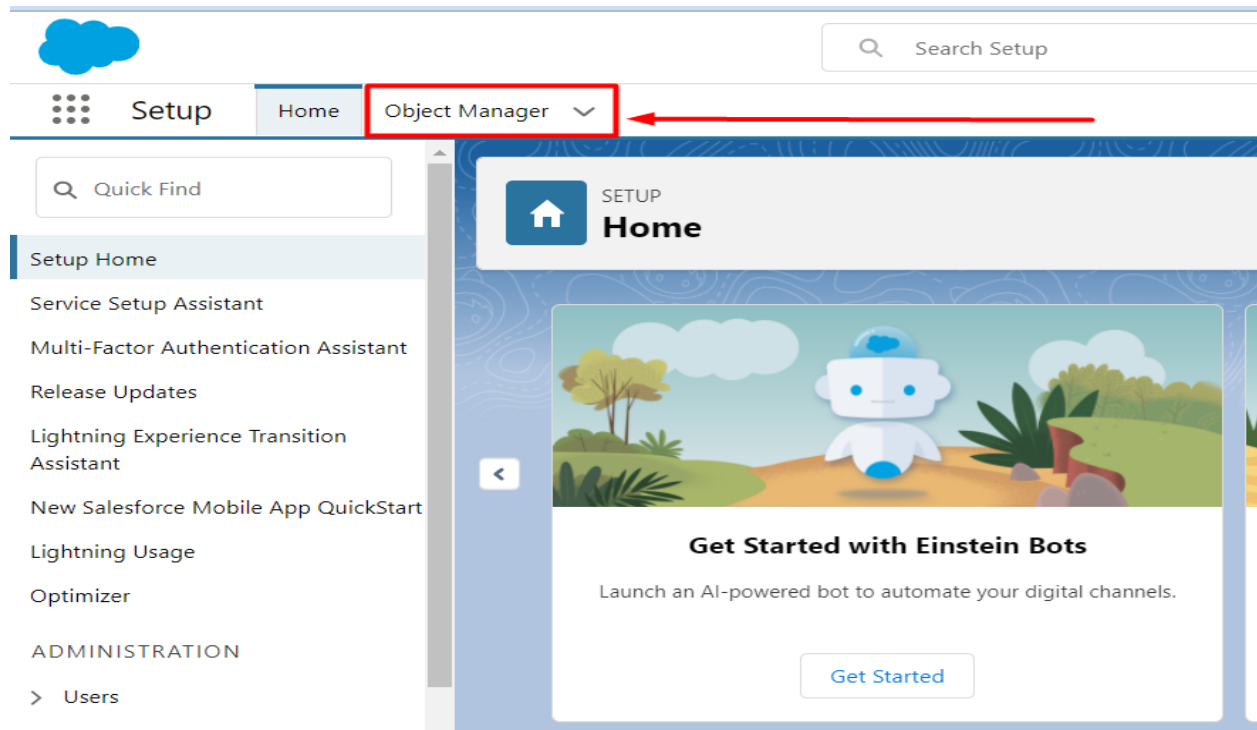


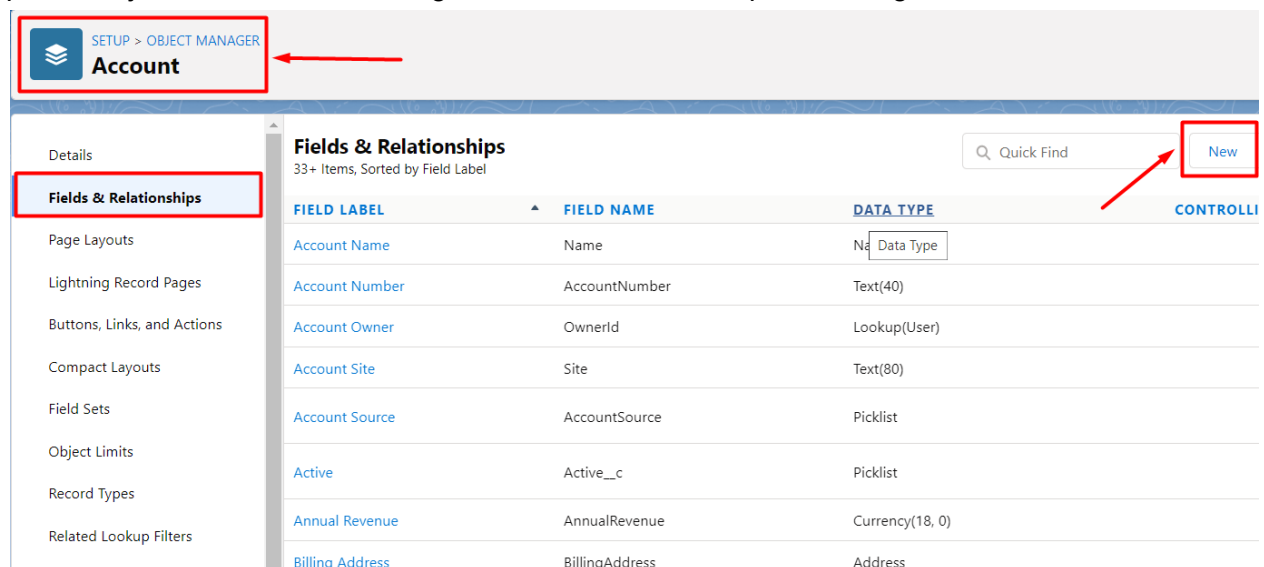
Lecture 1: Exploring rollup summary field:

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 popular 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 ⓘ

Field Name ⓘ

Description

Help Text ⓘ

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

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
☐ MAX

Field to Aggregate --None--

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	<input checked="" type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>
bgbb	<input checked="" type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>

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 5. Add to page layouts

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

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on an

To change the location of this field on the page, you will need to customize the page layout.

<input checked="" type="checkbox"/> Add Field	Page Layout Name
<input checked="" type="checkbox"/>	Account (Marketing) Layout
<input checked="" type="checkbox"/>	Account (Sales) Layout
<input checked="" type="checkbox"/>	Account (Support) Layout
<input checked="" type="checkbox"/>	Account Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

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.

Fields & Relationships			<input type="text" value="count"/>	New	Delete
8 Items, Sorted by Field Label					
FIELD LABEL	FIELD NAME	DATA TYPE			
Account Name	Name	Name			
Account Number	AccountNumber	Text(40)			
Account Owner	OwnerId	Lookup(User)			
Account Site	Site	Text(80)			
Account Source	AccountSource	Picklist			
Count Number of Colleges	Count_Number_of_Colleges__c	Roll-Up Summary (COUNT College)			
Left Employee Count	Left_Employee_Count__c	Number(18, 0)			
Parent Account	ParentId	Hierarchy			

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.

Annual Revenue		SIC Code
Left Employee Count		
0		
CopyBillingAddToShipping		
<input type="checkbox"/>		
Number of Contacts		
Count Number of Colleges		
0		
Billing Address		Shipping Address
		San Francisco
Customer Priority		SLA
SLA Expiration Date		SLA Serial Number
Number of Locations		Upsell Opportunity
Active		

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.

New College

Information

* College Name
ABCD1

Phone
123456

* Account
Test Acc REST API 2

Cancel Save & New Save

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.

Account
Test Acc REST API 2

CopyBillingAddToShipping
☐

Number of Contacts

Count Number of Colleges
1

Billing Address

Customer Priority

SLA Expiration Date

Number of Locations

Active

Created By

Shipping Address
San Francisco

SLA

SLA Serial Number

Upsell Opportunity

Last Modified By