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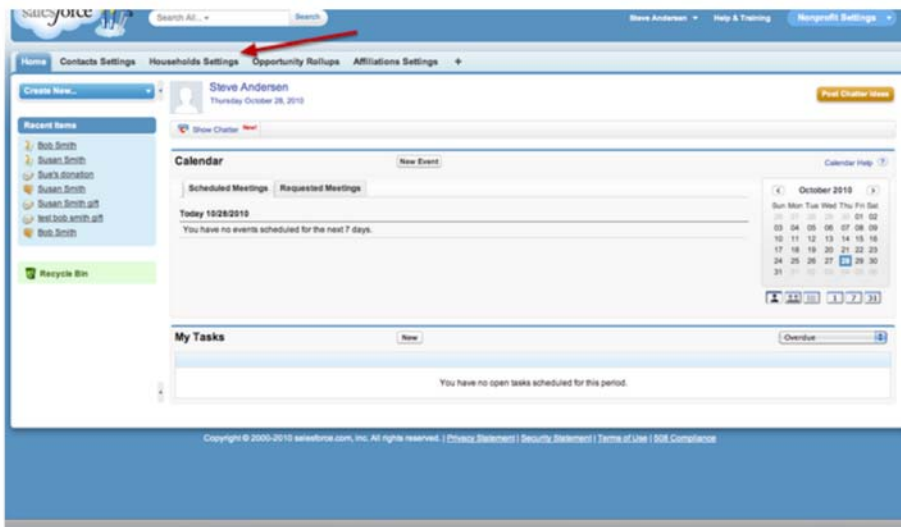
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NPSP: Controlling Opportunity Rollups

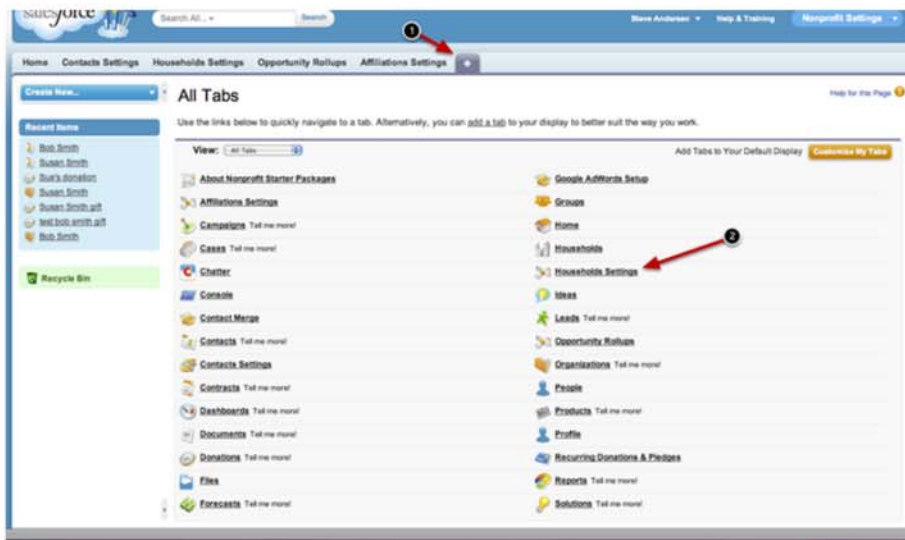
The Nonprofit Starter Pack allows you to control the behavior and types of values that are rolled up from the Opportunity to the Contact, Account or Household. This article will walk through the process of making those changes, and explain how the changes effect the behavior.

Go to the Household Settings tab

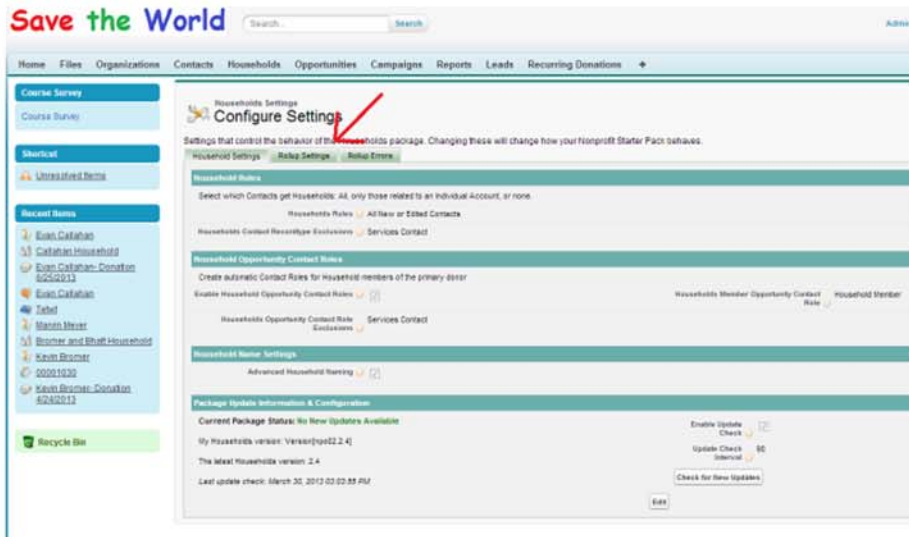


If you don't see the Tab, click the '+' tab at

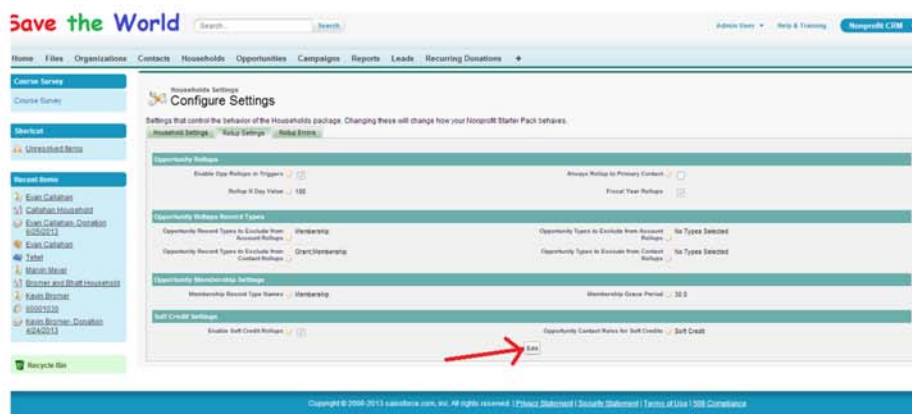
the end of the tab row



Select the 'Rollups Settings' portion of the Household Settings page



Modify Your Settings



Use the 'Edit' button to modify your existing settings. Click 'Save' when complete.

How the Settings Effect Your Rollup Behavior

Setting Name	Description	Requires Re-Roll
Enable Opp Rollups in Triggers	This checkbox determines if Opportunity values should be rolled-up when a triggering action (insert, update, delete) on the Opportunity occurs. If left unchecked, the values of your Opportunities will be calculated nightly, and any time you use the 'Opportunity Rollups' tab.	No
Rollup N Day Value	This setting determines the number of days (starting from today) worth of Opportunities are rolled-up for the 'Last N Day' fields on the Contact, Household and Account. By default this value is set to 365.	Yes
Always Rollup to Primary Contact	If checked, this box will force the value of the Opportunity to rollup to the Contact that has the primary Opportunity Contact Role, regardless of the Account listed as the Account Name on the Opportunity.	Yes
Fiscal Year Rollups	If checked, the rollups will be calculated based on the fiscal year settings for your organization. Please be aware that custom fiscal years (utilizing custom quarters, etc.) are not supported.	Yes

Setting Name	Description	Requires Re-Roll
Opportunity Record Types to Exclude from Account Rollups	Allows you to select multiple Opportunity record types to be excluded from rollup calculations for the Account object. Excluding Membership types (covered below) will not prevent Membership-related values from rolling up.	Yes
Opportunity Record Types to Exclude from Contact Rollups	Allows you to select multiple Opportunity record types to be excluded from rollup calculations for the Contact and Household objects. Excluding Membership types (covered below) will not prevent Membership-related values from rolling up.	Yes
Opportunity Types to Exclude from Account Rollups	Allows you to select multiple Opportunity Type values to be excluded from rollup calculations for the Account object.	Yes
Opportunity Types to Exclude from Contact Rollups	Allows you to select multiple Opportunity Type values to be excluded from rollup calculations for the Contact and Household objects.	Yes
Membership Record Type Names	This allows you to select an Opportunity record type to be treated as a Membership type. Membership values are rolled up to the Contact record and can be excluded from standard donation rollups (above) by using the Opportunity Record Type for Exclusion settings described above.	Yes
Membership Grace Period	Not currently in use.	No
Enable Soft Credits	Enables the soft credit fields on the Contact record to be calculated nightly or by using the Opportunity Rollup tab.	Yes
Opportunity Contact Roles for Soft Credits	Indicates what Opportunity Contact Role "Role" field values will be included when calculating soft credit rollups. Multiple values can be selected.	Yes



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