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NPSP: How do Rollups Work?

Versions 2.0 and later of the Nonprofit Starter Pack have the ability to automatically rollup aggregate Opportunity data to related records.

Opportunity values can roll up to the Account on the Opportunity, to the donor as listed in Contact Roles, and also to the Household record of the donor.

What Criteria Determine the Opportunities to be Rolled-up?

1. Opportunity Stage is in a Closed/Won state. Note this need not necessarily be called 'Closed Won', only that the value itself is closed/won as determined by the 'Stage' field on the Opportunity.
2. Opportunity Close Date has a value today or earlier.
3. Opportunity Record Type or Type is not excluded via the Household Settings tab
4. Either the Account Name is a non-1x1/Individual Account, OR there is a Contact listed as primary in the Opportunity Contact Role related list.
5. The change in the value of the Opportunity causes a change to a value on the Account/Household/Contact record. (For example, a change to the Opportunity Name will not trigger a rollup to the Account/Household/Contact record)

When Do Opportunities Rollup?

Opportunities rollup as you record them on insert, edit or delete of an Opportunity record. Note that an insert/edit/delete action that does not affect the value of the Account/Contact/Household will not trigger an Opportunity Rollup.

Rollups also happen asynchronously. Generally this means they calculate a few moments after you save. If you do not immediately see a change to the values on the Contact/Account/Household record, it can sometimes be beneficial to wait for a few moments and refresh the page to see if the calculation has been performed.

If you are loading records in with the API, it is **strongly** recommended that you temporarily turn off the Opportunity rollups in the trigger. This can be done by going to the Household Settings tab and unchecking the box for 'Rollup Opps in Trigger'. When your data load is complete, you can then run the manual Opportunity Rollups tab actions to calculate your values.

Scheduled Job

There is a nightly scheduled job that will rollup all of your Opportunities every night. This is automatically scheduled for your and will run each evening. This nightly recalculation will catch any un-calculated changes that exist as well as handle the date-related rollups.



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