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NPSP: Troubleshooting Rollups

Are your rollups not rolling up? Here are some things to try before pressing the panic button...

1. Are you running the most recent versions of the NPSP packages? Rollups are only available in versions 2.x and above for both Contacts & Organizations, and Households. You can find info on how to check your installed versions here: <http://www.youtube.com/watch?v=0TIVK3JBBCw&hd=1> (<http://www.youtube.com/watch?v=0TIVK3JBBCw&hd=1>)

2. Are you correctly displaying the summary rollup fields? Here's a snapshot of a typical layout for a contact record:

First Gift Date	2/24/2011	Last Gift Amount	\$40.00
Last Gift Date	2/24/2011	Largest Gift	\$40.00
		Smallest Gift	\$10.00
Total Gifts		Total Number of Gifts	3
Total Gifts Last 365 Days		Number of Gifts Last 365 Days	3
Total Gifts This Year		Number of Gifts This Year	3
Total Gifts Last Year		Number of Gifts Last Year	0
Total Gifts Two Years Ago		Number of Gifts Two Years Ago	0
Average Gift			

(https://lh3.googleusercontent.com/_uNPpUpTOfvA/TbBy6bzVxbI/AAAAAAAAAFHY/0yz7GqbcVLM/rollupfields.png)

3. Have you added custom validation or required fields to your Contact, Household or Account records? If you edit your Contact and try to save, does the validation/required field fail? When rollups are updated, any validation rules on your Contact/Account/Household are run. Any Contacts or Households that fail those rules will not be updated with the rollups.

4. Are your opportunities in a closed/won stage? Note: The name of the stage may not be 'Closed Won', it may be 'Posted', or some other variant. However, that stage has to be marked as closed/won in order for the opportunity to rollup. You can find out if your Stage value is closed/won by going to Setup->Customize->Opportunities->Fields->Stage and examine the 'Type' column for your Stage names.

5. When you go to the Opportunity Rollups tab, and manually run the rollups, are your values now correctly rolled up? If so, you may not have the opportunity trigger turned on. You can go to the Household Settings tab, select 'Roll Up Opps in

Triggers', and then click 'Update the Households Settings'

6. Are you excluding any record types from rollups? You can check this by going to Household Settings and looking at the Opportunity Rollups Record Types section.

7. Does your opportunity have an Opportunity Contact Role? If not, you may need to turn on OCRs in the trigger. Go to your 'Contact Settings' tab, and check the box 'Enable Opportunity Contact Role Trigger', and click 'Update the Contacts & Organizations Settings'. You'll need to add an Opportunity Contact Role for any Opportunities that do not already have one.



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