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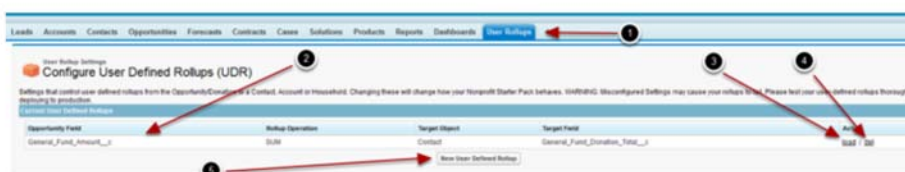
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NPSP: User Defined Rollups

Beginning in version 2.4, NPSP users can now define their own custom fields to be rolled up from Opportunities to the Household, Contact or Account object. User Defined Rollups follow the exclusions, restrictions and settings as regular Opportunity Rollups as configured in your Households Settings tab and use the Opportunity Contact Role marked as 'Primary' to rollup. This article will show you how to use the User Defined Rollup (UDR) tools.

User Rollups



User Defined Rollups allow you to create your own Opportunity Rollup Fields. You can access User Defined Rollups by selected the 'User Rollups' tab (1), you may need to click the '+' sign to view the tab.

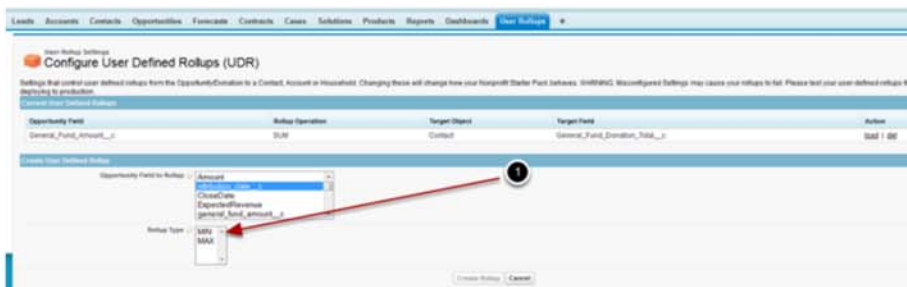
Your User Rollups tab will show you any existing rollups (2), as well as indicate if there are potential errors in those rollup fields as they are defined. Clicking 'load' next to an existing UDR will allow you to edit that User Defined Rollup (3). Clicking 'del' will delete that UDR (4). Clicking 'New User Defined Rollup' will walk you through the steps in defining your own UDRs (5).

Creating Your Own Rollup - 1



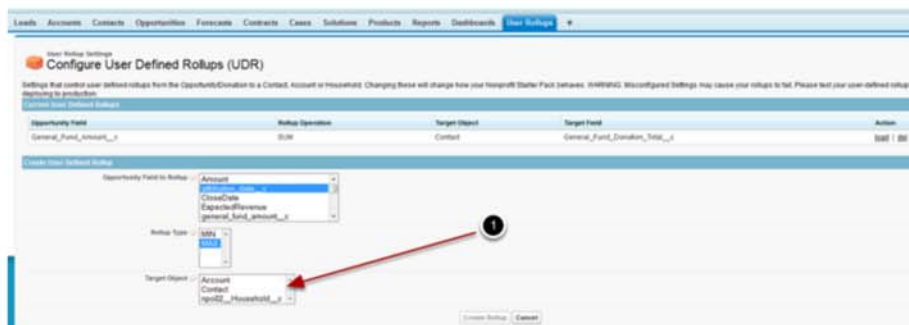
Click the 'New User Defined Rollup' button (shown above) to begin the process of creating your own rollup. Select the Opportunity Field you wish to rollup (1). You can select any user-accessible field on the Opportunity. Selecting the field will automatically bring up the next step.

Creating Your Own Rollup - 2



Select the type of rollup you wish to use (1). Possible options include MIN, MAX, SUM and AVG. The Rollup Types available to you are dependent on your selection in the previous menu. In this case, we've selected a Date field, (`attribution_date__c`), so SUM and AVG are not available as options.

Creating Your Own Rollup - 3



Select the object to receive the value of your rollup (1). Account, Contact and Household are the available options.

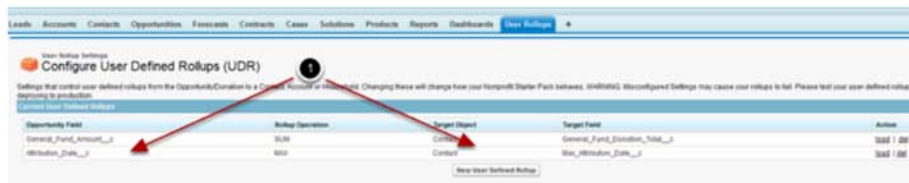
Creating Your Own Rollup - 4



Select the target field for the rollup value (1). Only fields that match the rollup data, and are not used in another rollup, will be displayed. In the example above, we've created a custom date field on the Contact object to hold the max attribution_date__c from our Opportunity.

Once a valid combination is selected, the 'Create Rollup' button will be enabled. Click 'Create Rollup' to create your new rollup. (2)

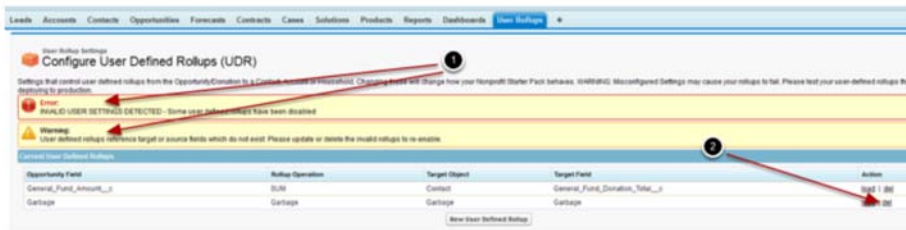
Creating Your Own Rollup - Final



Once your rollup is defined, confirm your settings are as configured. (1)

Use the 'Opportunity Rollups' tab to trigger a mass-recalculation of your records, including your new rollup.

User Rollups - Errors



If you have User Defined Rollups that may cause errors, your User Rollups tab will display error messages indicating there is an issue (1). Deleting or editing the offending UDR will remove the errors (2).



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