

NPSP: Opportunity (Donation) Rollups Overview

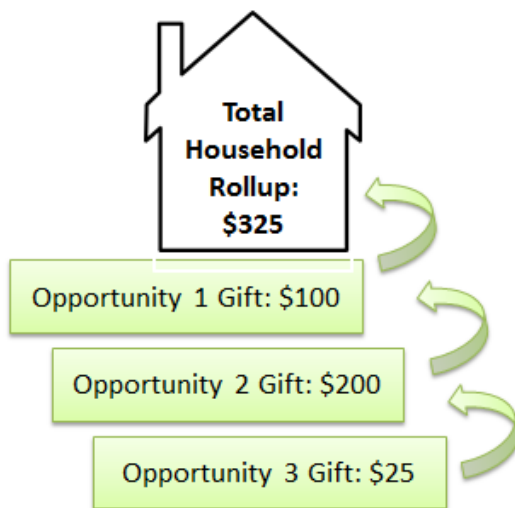
In the Nonprofit Success Pack, rollups are tallies of donations from different Opportunity records.

This article includes these topics:

- What Are Rollups?
- Rollup Fields on Accounts and Contacts
- When Are Opportunity Rollups Updated?

What Are Rollups?

Rollup fields on Accounts and Contacts display information from other related records, including aggregate totals. To think of this another way, rollup fields allow information from one record to automatically “roll up” and appear on another related record. For example, the Total Gifts field on an Organization Account displays the total value of all the donations from that organization—it’s the total value from across all the associated Opportunity records “rolled up” into one.



In the Nonprofit Success Pack, Account and Contact records include several rollup fields that display totals based on their related Opportunities:

- Membership Information
- Total Gifts
- Soft Credits
- Household Donations

- Donation Statistics

This image shows the Opportunity Rollups for an Organization Account. Most fields with totaled values are rollup fields that show us aggregated values from related Opportunity records.

▼ Donation Information			
First Gift Date	9/27/2014	Last Gift Amount	\$500.00
Last Gift Date	9/27/2014	Largest Gift	\$500.00
Average Gift	\$325.00	Smallest Gift	\$150.00
Best Gift Year	2014	Best Gift Year Total	\$650.00
▼ Donation Totals			
Total Gifts	\$650.00	Total Number of Gifts	2
Total Gifts Last N Days	\$650.00	Number of Gifts Last N Days	2
Total Gifts This Year	\$650.00	Number of Gifts This Year	2
Total Gifts Last Year	\$0.00	Number of Gifts Last Year	0
Total Gifts Two Years Ago	\$0.00	Number of Gifts Two Years Ago	0
▼ Membership Information			
Total Membership Amount	\$0.00	Last Membership Date	
Membership End Date		Last Membership Amount	\$0.00
Last Membership Level		Last Membership Origin	
Membership Join Date		Number of Memberships	0

Notice the Donation Totals section includes a Total Number of Gifts (two Opportunities) and a Total Gifts amount of \$650. To determine the exact Opportunities and their details for this rollup, you would need to examine this Account and look at all the Opportunities for the details. The rollup, however, gives you very useful aggregate information about all Opportunities.

Rollup Fields on Accounts and Contacts

The following sections on the Account and Contact objects contain information from their related Opportunities:

Donation Information

This section shows useful statistics and gives you a quick, high-level overview about donations (Opportunities) associated with a particular Account. You'll find information about donation dates, the average, largest, and smallest donation amounts, and so on.

Donation Totals

This section gives you running totals of donations received from this Account over different periods of time. For example, you can see the Donation totals from this year, the previous year, and from two years ago. You can also configure a custom period. In the Total Gifts Last N Days, N can be set to a period of your choice; the default setting is 365 days.

To configure a custom value for N, click the NPSP Settings tab in the Nonprofit Success Pack. Then, click

Donations | Donor Statistics, click **Edit**, and lastly, specify a different number of days for the **Rollup N Day Value**.

Membership Information

This sections contains the rollup information if your organization is using memberships. More information on this is available in the NPSP Memberships documentation (/articles/Resource/NPSP-Working-with-Memberships?

popup=false&navBack=H4slAAAAAAAAAAIuuVipWslLyzssvz0INSU_1yM9NVdJRygaKFSSmp4ZkluSA-KVAvn58aaZ-NkyhPpCDqqs2FgCHRwp0TQAAAA).

Additional Rollup Information on Contacts

In addition to these sections, Contact records also include rollup information about soft credits as well as Household donation information, which is a rollup of the total donations made by everyone else in the household. Soft credits, and the contact roles responsible for creating them, are a major though complicated feature in the Nonprofit Success Pack. To learn more, read the NPSP soft credits documentation (<https://powerofus.force.com/articles/Resource/Nonprofit-Starter-Pack-3-Documentation#!#scmg>).

⚠ IMPORTANT : *You should consider rollup fields **read only** (and if you are the administrator for your organization, you might want to set them as read only on page layouts). Salesforce Admins will still have the ability to edit rollup fields in place, but any edits you make to these fields will be overwritten when rollups are recalculated.*

When Are Opportunity Rollups Updated?

Rollup values on a specific Account or Contact are re-tallied when key fields are updated on related Opportunities such as Amount, Stage, and Close Date. In addition, rollup values are recalculated nightly to ensure accuracy. You can also choose to run the rollup nightly operation (called a “batch operation” because it tallies fields for multiple records at once) from the NPSP Settings tab at any time. On the NPSP Settings tab, look under **Donations | Rollup Donations Batch**.



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