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# PWR Rollups User Guide

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By Orektic Solutions LLP





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## I Introduction

### I.I Orektic

Orektic is known for state-of-the-art cloud-based, SAAS solutions that help our clients to transform the way they do business.

We exist to solve the critical issues facing our clients, both large and small. Our unique approach is not only what differentiates us, but also what makes us successful. We provide a broad range of services and solutions to help organizations facilitate change, achieve their vision, and optimize performance and productivity.

From implementing new business strategies to ultra-efficient work processes, Orektic is ready to tackle any challenge and put you on the path to success. With state-of-the-art cloud-based, SAAS solutions transform the way you do business.

Orektic is one of the software companies from the Enzigma group.



### I.II Enzigma LLC

Enzigma LLC is the exclusive reseller of Orektic products.





## II ▶ Product Introduction

PWR Rollups is a user-friendly cloud-based application that provides advanced and powerful features that allow not only technical but also non-technical users to achieve single as well as multiple roll-up operations from a single place. It's configured so that users can easily perform operations on existing records or newly created records.

As they say “Modern Problem requires Modern Solution”, our cloud-based application - PWR Rollups solves all the earlier business problems. This is done using a no-code approach. (Click-Click and Done).

With a user-friendly and easy-to-use design that allows admins and other non-technical people to meet their needs easily and maximize the efficiency and profitability of the business. Build complex business scenarios with ease and within a few clicks. Whoosh!! No development team hence no code.





### III Product Features

1. **PWR Rollups** is a cloud-based and user friendly application
2. Rollup up to **5 levels** of the object hierarchy
3. Supports Rollup on both **Master-Details** and **Lookup** Relationship
4. Inbuilt tool to recalculation rollup result on the **existing** records in few clicks
5. Auto calculation of the rollup result on both new and old parent objects upon reparenting
6. Retry mechanism if any of the rollup operations fails
7. Supports schedule rollup for recalculation process
8. Create multiple rollup operations from a single place
9. Attractive UI through which user(Development team + Business team) can easily create the rollups actions (COUNT, COUNT DISTINCT, SUM, MAX, MIN, AVG)
10. With the help of this UI, users can easily create multiple rollup actions at a time under a single rollup. As a result, it saves tons of time and money
11. Users can update a large number of records asynchronously by adding custom-defined criteria and filters
12. Create fields directly from PWR Rollups UI. Avoiding the lengthy process of field creation from the object manager
13. Easily activate and deactivate the rollup actions



## IV Product Versions

Version	Release Date	Description
PWR Rollups 3.2/3.2.0	04/29/2024	<ul style="list-style-type: none"><li>Fixed the issue of old triggers deletion of external manage package objects during the package upgradation process</li></ul>
PWR Rollups 3.1/3.1.0	04/24/2024	<ul style="list-style-type: none"><li>Fixed the issue of trigger creation for certain objects within Salesforce-managed packages that feature consecutive underscores in their API names</li></ul>
PWR Rollups 3.0/3.0.0	04/18/2024	<ul style="list-style-type: none"><li>Introduced LWC UI for Rollup Creation</li><li>Introduced New tab Getting Started to guide the user</li><li>Implementation of a new tab called recalculation that simplifies the recalculation process and stores the history of the recalculation</li><li>Implementation of schedule rollup recalculation process</li><li>Optimized the rollup execution process to reduce the execution time</li><li>Fixed some minor bugs</li></ul>
PWR Rollups 2.9/2.9.0	12/05/2023	<ul style="list-style-type: none"><li>Fixed the issue of the added rollup types and custom filters which are not displayed when the user clicks on the previous button while creating and editing the rollup</li><li>Fixed the issue of custom filter criteria which are not working for intermediate objects</li><li>Fixed the issue of the new version which is created even if we don't modify the rollup</li></ul>



		<ul style="list-style-type: none"><li>• Fixed the issue of the rollup custom filter which not working for particular fields if we provide a null value in the criteria field</li><li>• Fixed the typo in the operator of a custom filter</li></ul>
PWR Rollups 2.8/2.8.0	10/04/2023	<ul style="list-style-type: none"><li>• Ability to apply a custom filter on the destination object</li><li>• Update recalculation email template</li><li>• Commons bug fixes with exception handling</li></ul>
PWR Rollups 2.7/2.7.0	07/17/2023	<p><b>Improvements:</b></p> <ul style="list-style-type: none"><li>• Implementation of the Save and Run feature</li><li>• Implementation of Lookup Fields in the source object field with a 5-level lookup hierarchy</li><li>• Ability to create and run rollups on managed package objects</li><li>• Ability to let user unselect/set blank fields in any picklist field</li></ul> <p><b>Bug Fixes:</b></p> <ul style="list-style-type: none"><li>• Fixed visibility of polymorphic fields while editing</li><li>• Fixed the issue of redirection to the version page after editing and saving any roll-up.</li><li>• Fixed the issue of updating the list of destination object fields after creating any new field from the same rollup UI.</li><li>• Fixed the issue of being unable to select any field from the drop-down after adding filters that have pre-populated fields while creating or editing any roll-up.</li></ul>



PWR Rollups 2.6/2.6.0	05/29/2023	<ul style="list-style-type: none"><li>• Implementation of Count distinct feature</li><li>• Added all supported data types</li><li>• Fixed package expiry issue</li></ul>
PWR Rollups 2.5/2.5.0	03/23/2023	<ul style="list-style-type: none"><li>• Improvements in getAllObject API</li></ul>
PWR Rollups 2.4/2.4.0	03/20/2023	<ul style="list-style-type: none"><li>• Bug fix for visibility of list of fields in the filter criteria section</li><li>• Updated the error message for remote site settings</li><li>• Updated the PWR Rollups icon image in the application</li></ul>
PWR Rollups 2.3/2.3.0	01/31/2023	<ul style="list-style-type: none"><li>• Bug fix for automatically activating the latest rollup version</li><li>• Added Source and Destination fields on PWR Rollups UI</li></ul>
PWR Rollups 2.2/2.2.0	11/17/2022	<ul style="list-style-type: none"><li>• Manage package Objects working in Rollups</li><li>• One relationship field for multiple objects functionality is not working</li><li>• Related to the object is changing to default</li></ul>
PWR Rollups 2.1/2.1.0	10/21/2022	<ul style="list-style-type: none"><li>• Order object dependency removed while installation of PWR Rollups</li><li>• Fixed minor bugs</li></ul>
PWR Rollups 1.2/1.2.1	09/15/2021	<ul style="list-style-type: none"><li>• Minor bug fixes</li></ul>
PWR Rollups 1.2/1.2.0	08/03/2021	<ul style="list-style-type: none"><li>• Users can create rollups directly on the production</li></ul>
PWR Rollups 1.1/1.1.0	01/12/2021	<ul style="list-style-type: none"><li>• First release</li></ul>





## V Configuration Guide

### V.I Installation Steps

To install PWR Rollups managed package do follow the mentioned steps here:

1. Navigate to AppExchange and search for PWR Rollups or [click here](#)
2. Click on the 'Get It Now' button
3. The link will direct you to the PWR Commons application page, it is a prerequisite package for PWR Rollups
4. Click on Get it now from the apps information page
5. Enter the credentials for the org in which you want to install and log in
6. Choose to install the package in either the production org or Sandbox by clicking "Install in Production" or "Install in Sandbox"
7. Tick the checkbox indicating your agreement with the terms and conditions, then proceed by clicking on the "Confirm and Install" button
8. Select the desired installation option (Install for All Users, Install for Admins Only, or Install for Specific Profiles), and click "Install"
9. Click "Done" once the installation is complete
10. It may take some time to complete the installation package. You will be notified through Email once the installation is completed
11. Now open the PWR Commons application from the application manager
12. Click "Install Now" in front of the **PWR Rollups** application in the list of products
13. Enter the credentials of the logged-in organization and log in
14. Select the desired installation option, and click "Install"
15. Click on Done once the installation is completed
16. It may take some time to complete the installation package. You will receive an email notification when the installation is finished

**\*\* For reference and more details about package installation, please [click here](#)**

Any potential customer with a package link for PWR Rollups from the support or sales team, then to install PWR Rollups managed package do follow the mentioned steps here:

1. Open the installation URL received from our sales or support team in the browser
2. Enter your credentials for the Salesforce organization in which you want to install the package and then click on **Log In**
3. Repeat the steps mentioned above from step 5



### V.II Pre-requisites

As a prerequisite, the Salesforce admin needs to make sure that the Salesforce org is already set up with their domain name.

In case your org is not set up with the Domain Name then the contents of the Package will not be available for use. To enable the domain name open Setup from the Quick Find box, find “My Domain” and Set up a Domain Name for your org. For more details and information, please [click here](#)

### V.III Steps to Upgrade Package

If the user wants to upgrade the package from the package version below 2.9, do follow the below-mentioned steps here:

1. Open the PWR Commons application from the application manager in your org
2. Click “Upgrade Now” in front of the Commons application in the list of products
3. Select the desired upgradation option, and click “Upgrade”
4. Click on Done once the upgradation is completed
5. It may take some time to complete the upgrade of the package. You will receive an email notification when the upgradation is finished
6. After upgrading the PWR Commons package, we need to upgrade the PWR Rollups package
7. click on “Upgrade Now” in front of the Rollups application in the list of products on PWR Commons UI
8. Repeat the process from 3 to 5
9. After upgrading the PWR Rollups package, open the PWR Rollups application from the application manager
10. Clicks on Rollups tab
11. Click on the “Upgrade Now” button on the rollups homepage
12. Please wait until the whole upgradation process is completed and avoid refreshing the page while the upgradation process
13. Once your upgradation is completed, you will be notified about its status on the rollups homepage



## V.IV Step by Step Walkthrough

After installing the PWR Rollups application from the AppExchange user needs to log in to the same organization where the user has installed the PWR Rollups package.

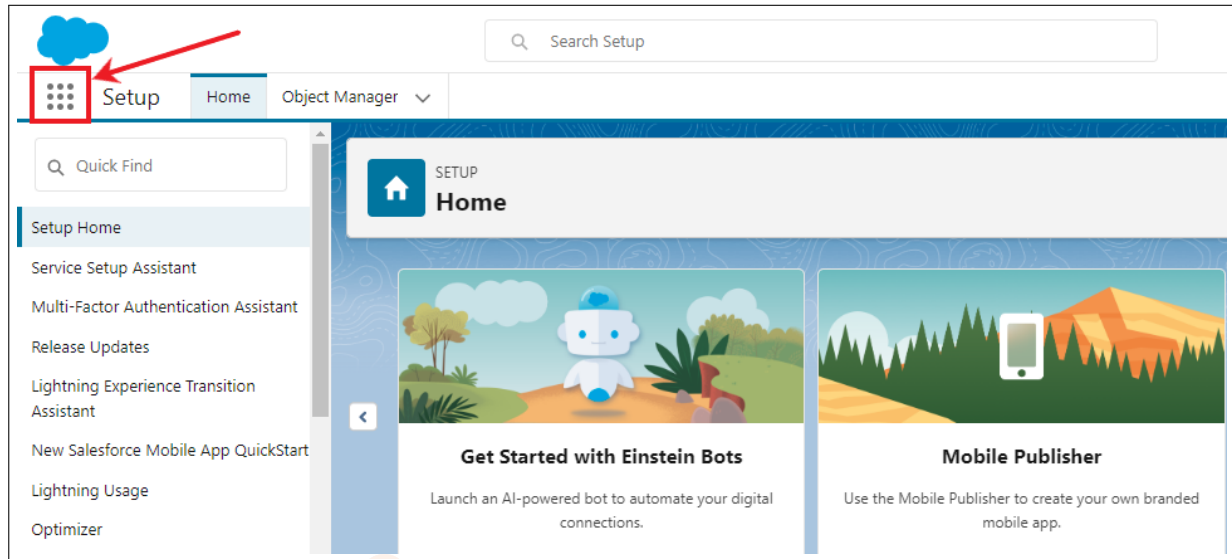


Figure 1: Installation of the package in Salesforce

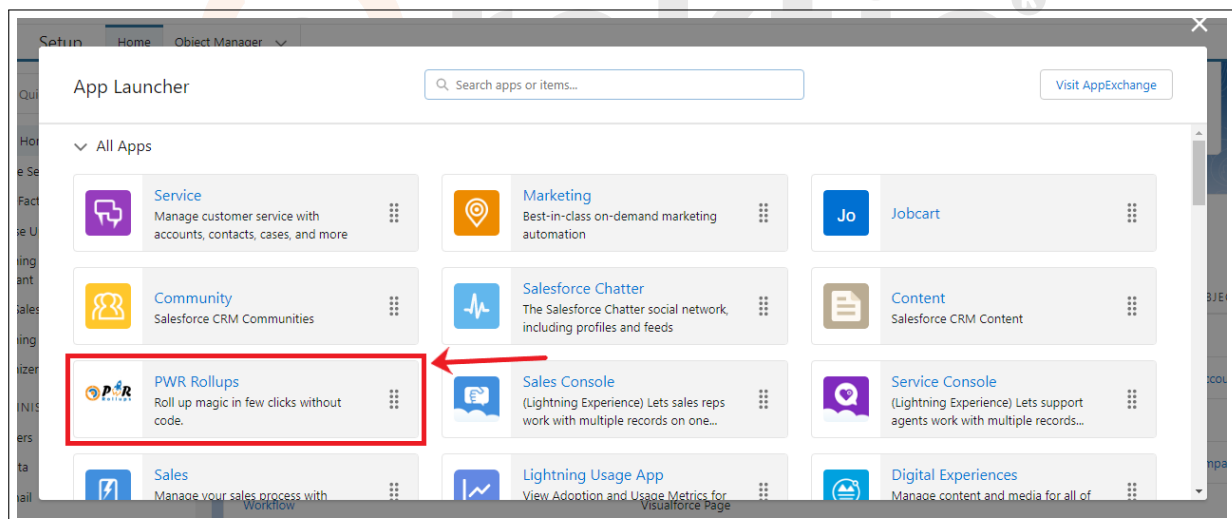


Figure 2: Installation of the package in Salesforce

In the PWR Rollups application, the “Get Started” tab provides users with quick access to essential information and resources related to this package. This tab includes:

1. Configuration Guide: This will give user the an idea of the installation process of the PWR Rollups package in your organization
2. Docs: This will give the user the information of all documents of the PWR Rollups application
3. Blogs: This will give the user, the information of the PWR Rollups application
4. App Guidance: This will give the user the step-by-step procedure of creating a rollup and recalculation process
5. Demo and Tutorial Videos: This will provide users with some use cases and the features of the PWR Rollups application
6. FAQs: Common Questions and Answers related to this application

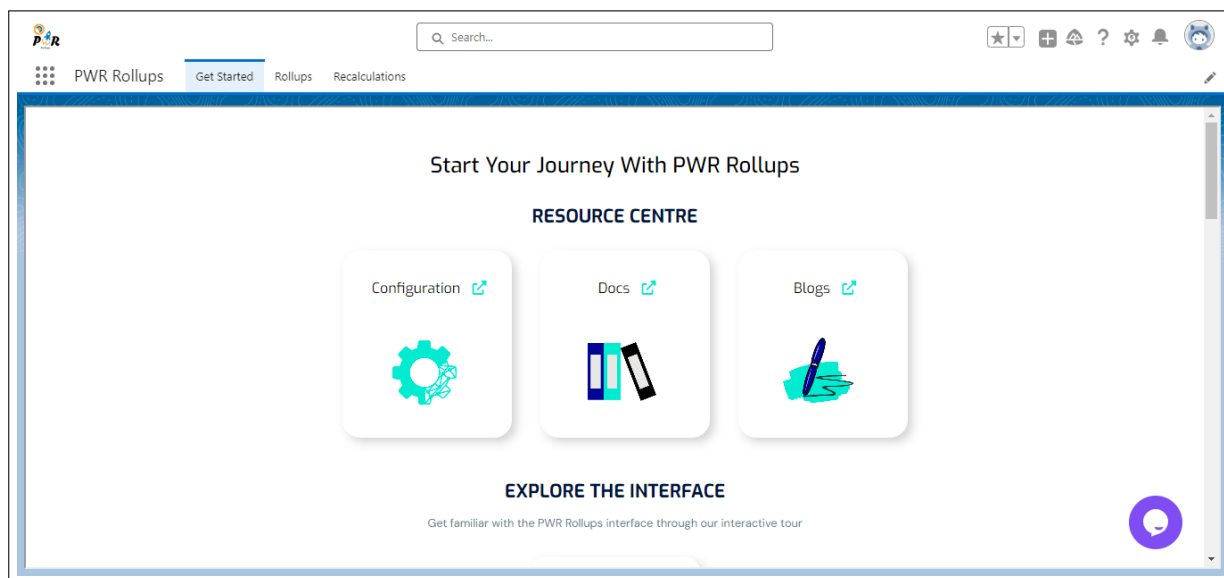


Figure 3: Get Started with Rollup

To create a roll-up action click on the New button :

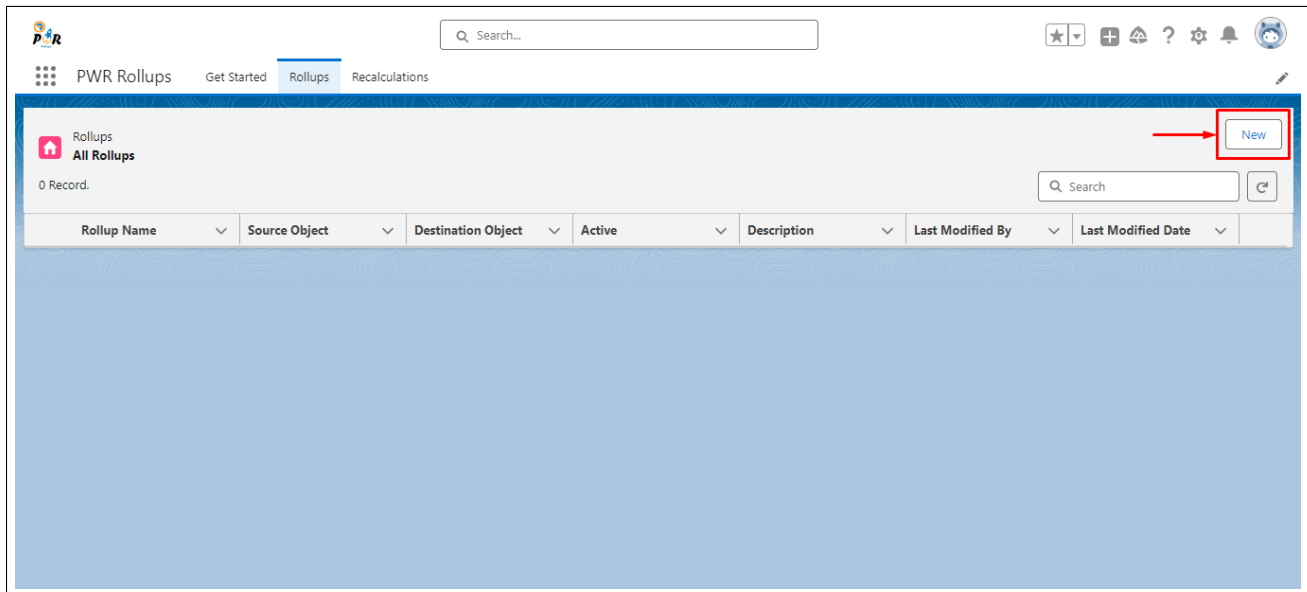


Figure 4: Creation of Rollup

Enter the Action Name and Description to identify the purpose of this rollup. Then select the Source Object by clicking on the '**Select Source Object**' watermark.

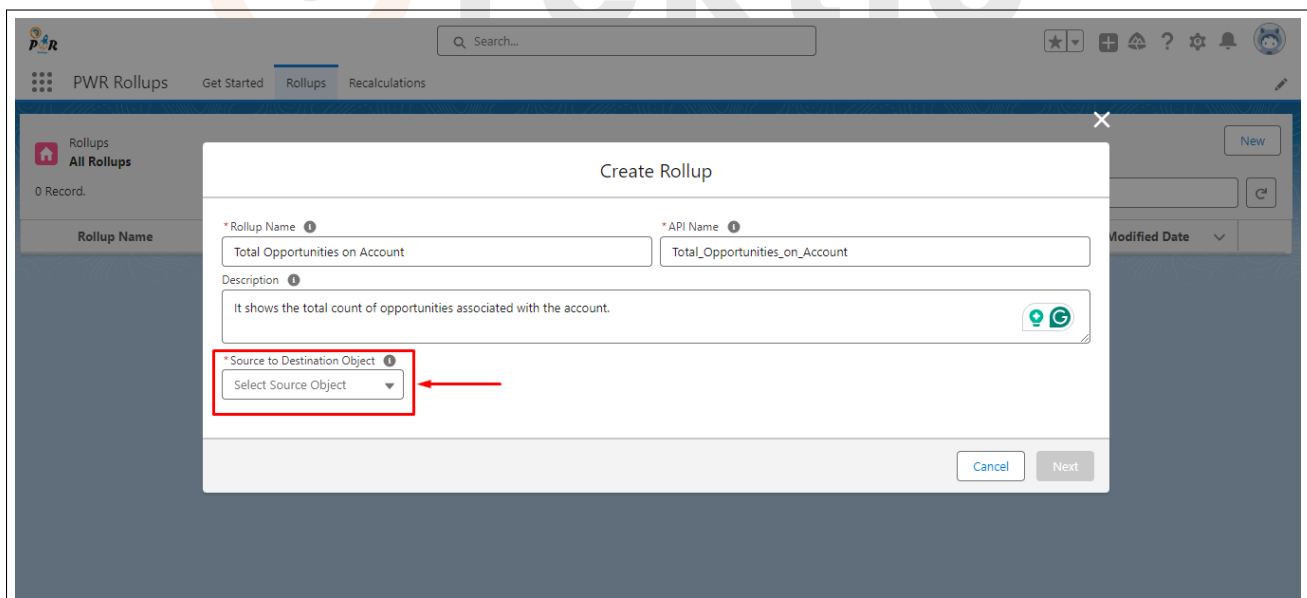


Figure 5: Select Source Object



Select the **parent** object on which or through which you want to decide the path for the destination object and on which you want to show the rollup result

The screenshot shows the 'Create Rollup' dialog box in the PWR Rollups application. The dialog has a sidebar on the left with 'Rollups' and 'All Rollups' sections. The main area contains the following fields:

- \* Rollup Name**: Total Opportunities on Account
- \* API Name**: Total\_Opportunities\_on\_Account
- Description**: It shows the total count of opportunities associated with the account.
- \* Source to Destination Object**: A dropdown menu with 'Opportunity' selected and 'Select Related To' as the relationship. A red box highlights the 'Opportunity' dropdown, and a red arrow points to it.

At the bottom right, there are 'Cancel' and 'Next' buttons.

Figure 6: Select Destination Object

After selecting the object, click on the **Next** button.

The screenshot shows the 'Create Rollup' dialog box in the PWR Rollups application. The dialog has a sidebar on the left with 'Rollups' and 'All Rollups' sections. The main area contains the following fields:

- \* Rollup Name**: Total Opportunities on Account
- \* API Name**: Total\_Opportunities\_on\_Account
- Description**: It shows the total count of opportunities associated with the account.
- \* Source to Destination Object**: A dropdown menu with 'Opportunity > Account ID' selected and 'Select Related To' as the relationship.

At the bottom right, there are 'Cancel' and 'Next' buttons. A red box highlights the 'Next' button, and a red arrow points to it.

Figure 7: Creation of Rollup

To add the Rollup Type, Source Object Field, and Destination Object Field, click on the Add Rollup button.

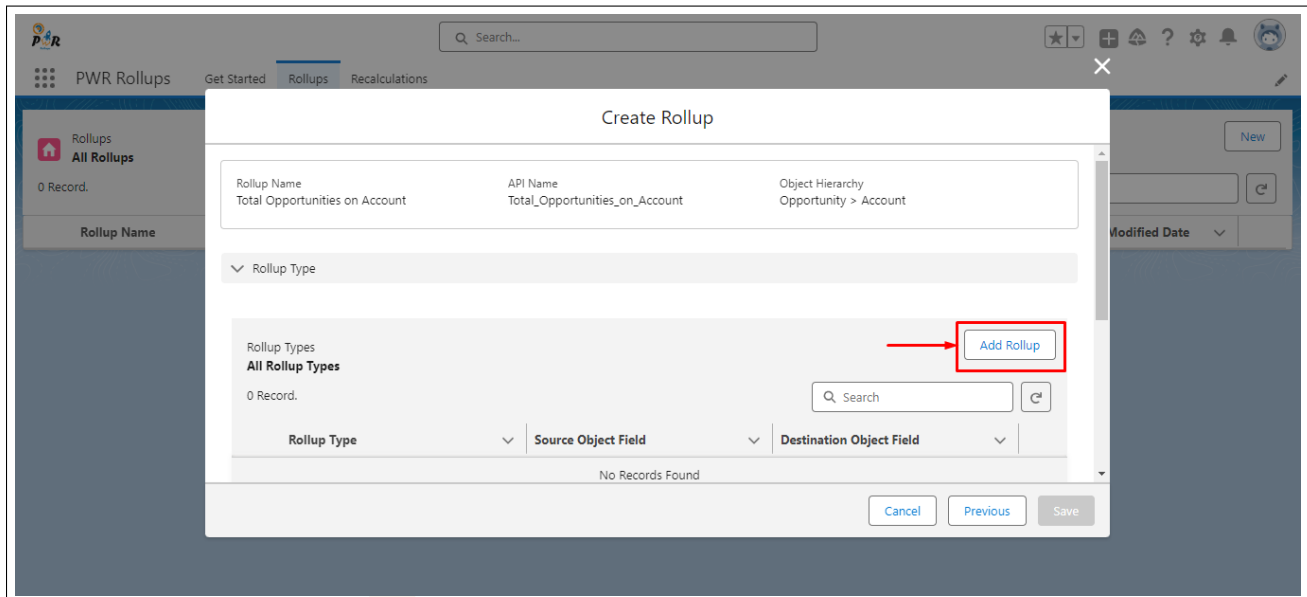


Figure 8: Creation of Rollup

Here users can select the Rollup Type as **Count**, **Count Distinct**, **Maximum**, **Minimum**, **Sum**, and **Average**

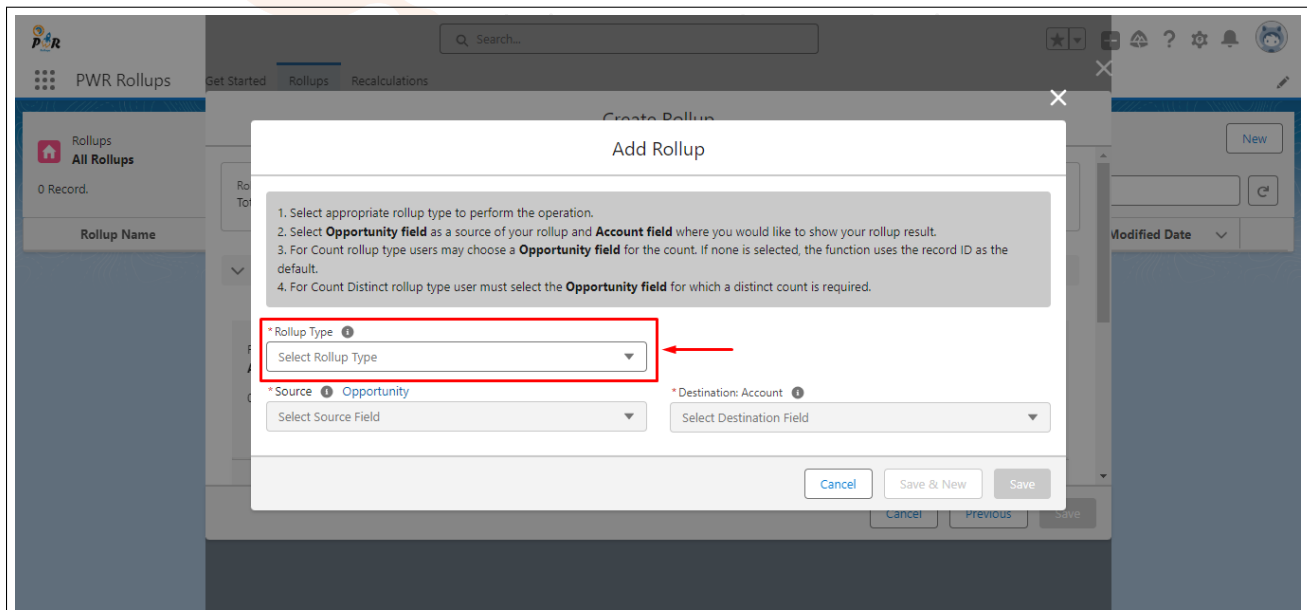


Figure 9: Select Rollup Type



Let's select the Count and Select Opportunity Count field from Account Fields. Here you need to make sure you have created the Opportunity Count Field on the Account Object.

Now, what if the user forgets to create the Account Field earlier? Does the user need to navigate back to the Account Object, create a new field, and repeat the roll-up fieldwork from the start? So the answer is NO! We have a solution for this. Users can create the new field from the same select destination dropdown by simply clicking on Create New Field. Once the field is created successfully, you need to manually set the field on Page Layouts and Field Level Security.

1. Select appropriate rollup type to perform the operation.  
2. Select **Opportunity** field as a source of your rollup and **Account** field where you would like to show your rollup result.  
3. For Count rollup type users may choose a **Opportunity** field for the count. If none is selected, the function uses the record ID as the default.  
4. For Count Distinct rollup type user must select the **Opportunity** field for which a distinct count is required.

\* Rollup Type ⓘ  
Count

Source ⓘ Opportunity  
Select Source Field

\* Destination: Account ⓘ  
Total Opportunities

Cancel Save & New Save

Figure 10: Select source and destination field

Here we are not restricting the user to create only a single roll-up action at a time. Using this app the user can create multiple roll-up actions under the same page just by clicking on the 'Save & New' button.



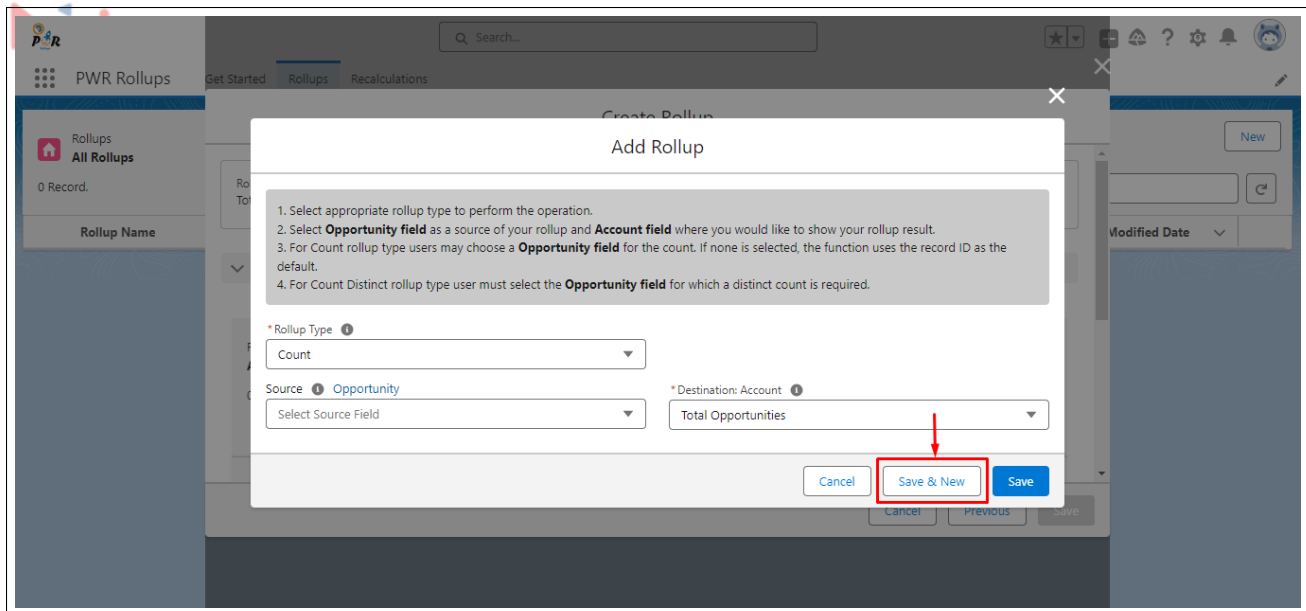


Figure 11: Creation of Rollup

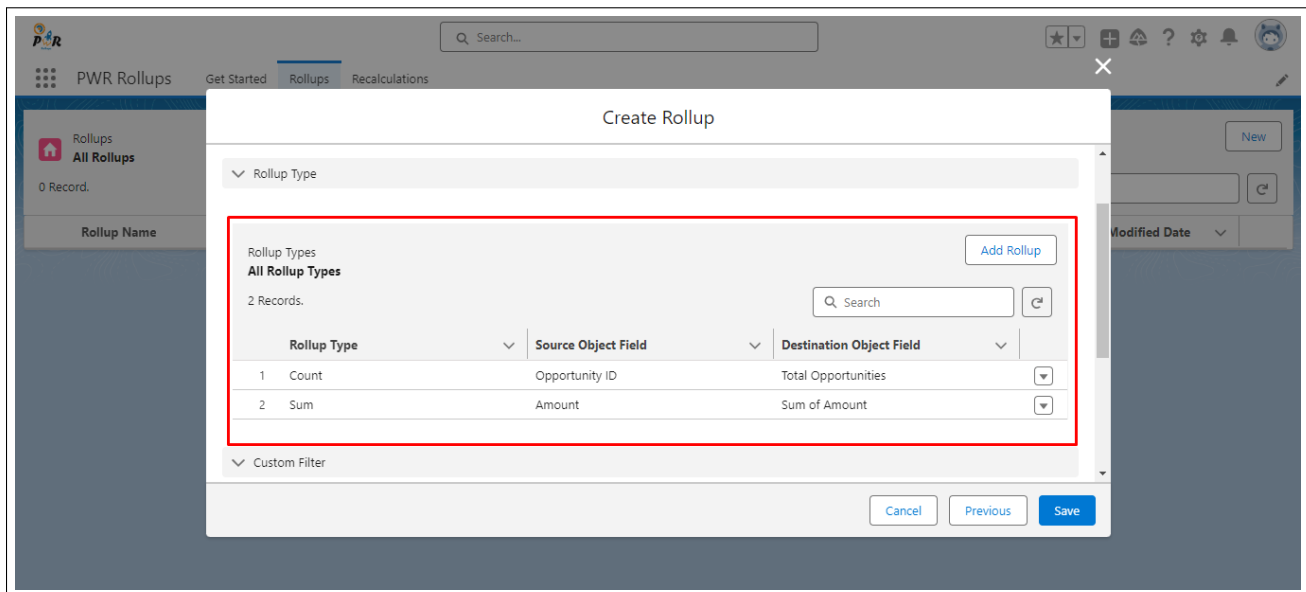


Figure 12: Creation of Rollup

Users can add custom filters to filter out the precise records by clicking on “**Add Condition**” considering the Roll-ups.

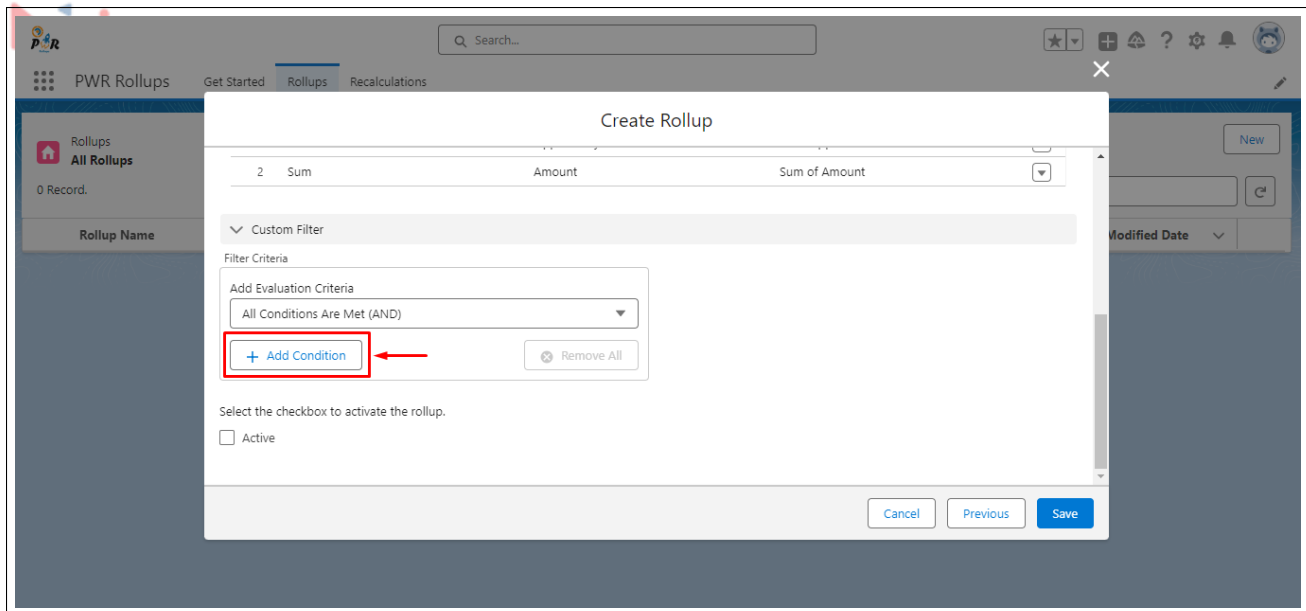


Figure 13: Add Custom Filters

If the user adds multiple filters then we can apply logical conditions to it.

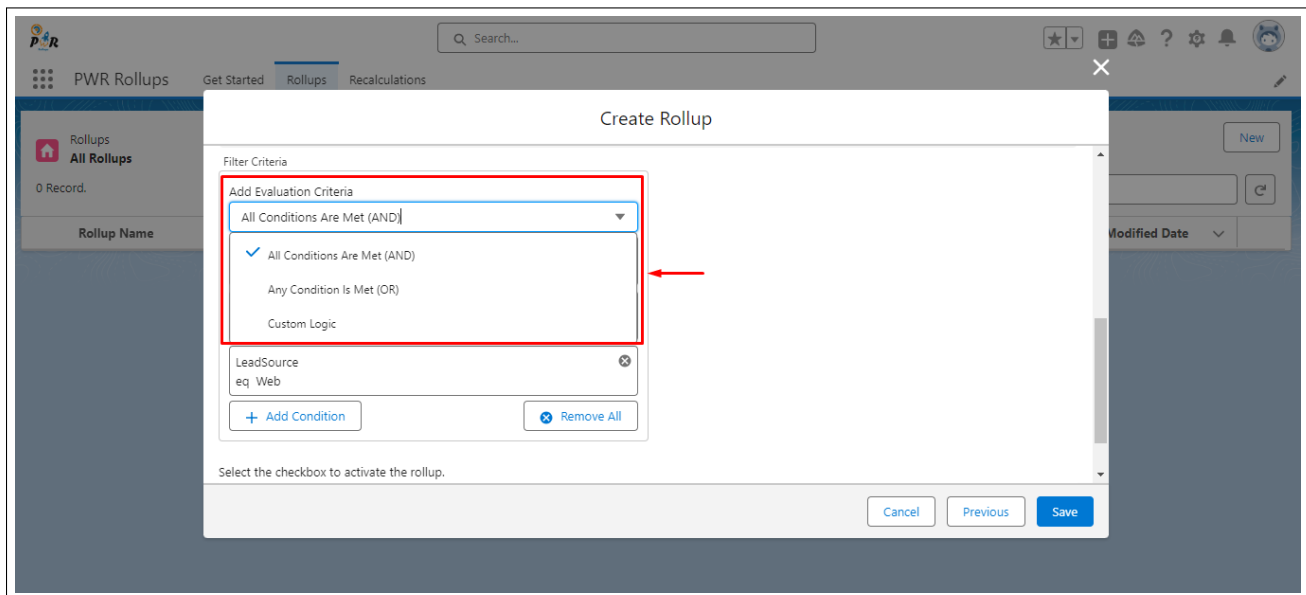
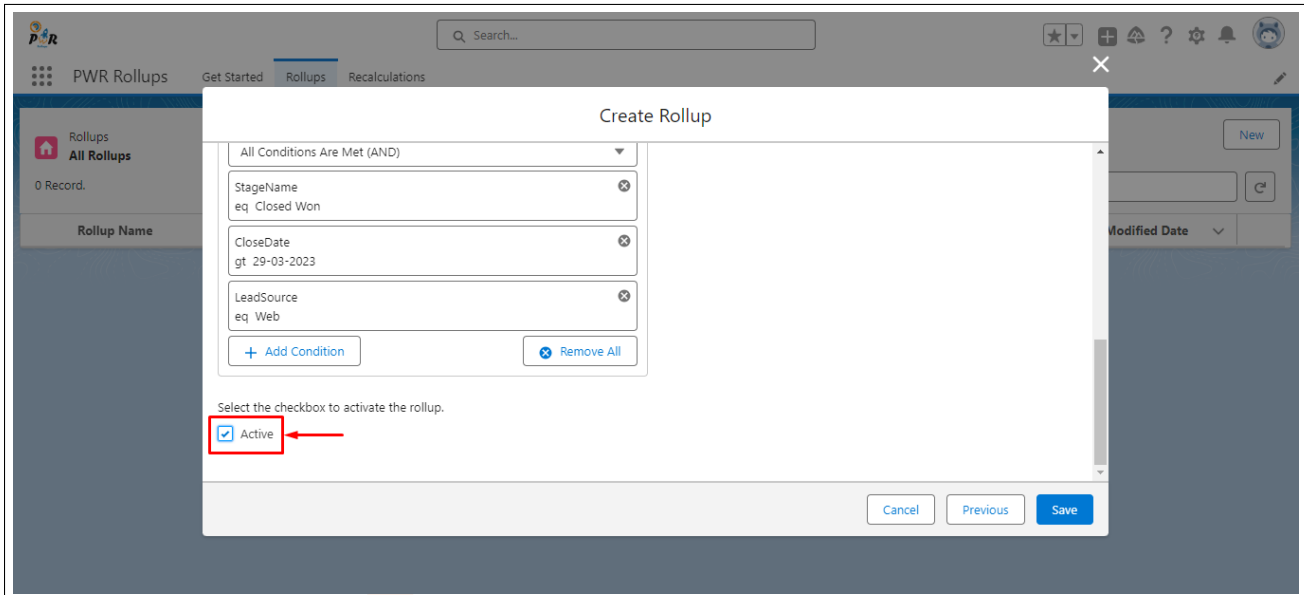


Figure 14: Select Evaluation criteria

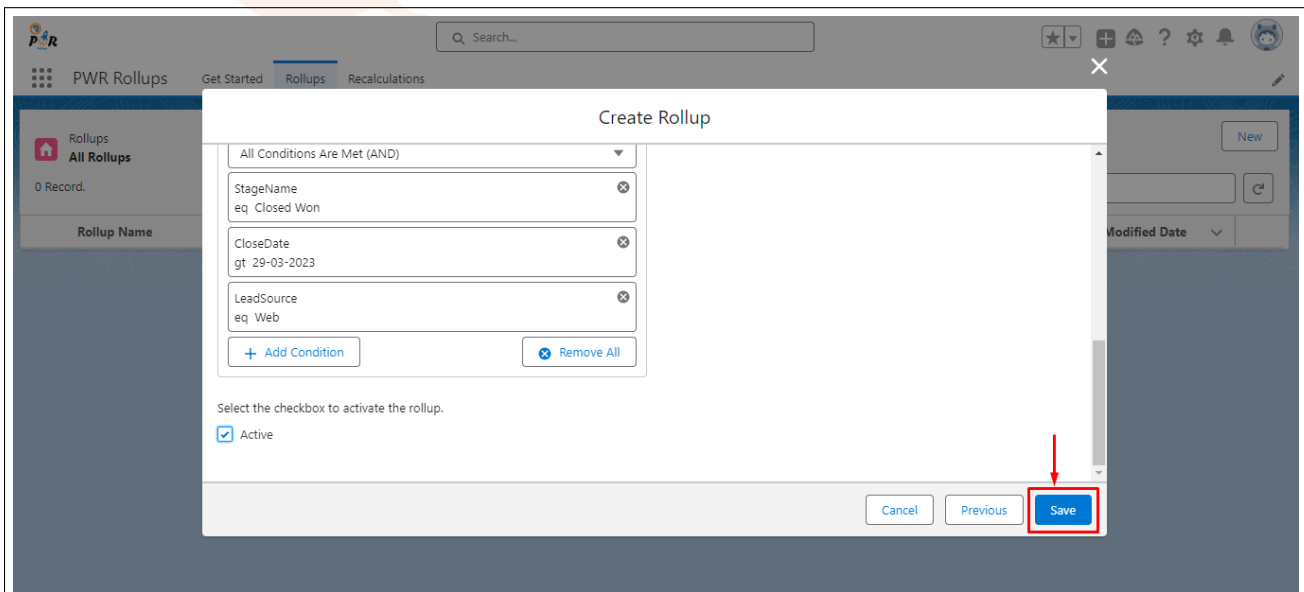
Here the user can decide whether to activate the roll-up on Save using the checkbox, else the user can activate it from the landing page.



The screenshot shows the 'Create Rollup' dialog box in the PWR Rollups application. The dialog has a title bar with a close button. Below the title bar, there's a search bar and a list of tabs: 'Get Started', 'Rollups', and 'Recalculations'. The 'Rollups' tab is selected. On the left side, there's a sidebar with 'Rollups' and 'All Rollups' sections. The main area of the dialog contains a list of conditions under the heading 'All Conditions Are Met (AND)'. The conditions are: 'StageName eq Closed Won', 'CloseDate gt 29-03-2023', and 'LeadSource eq Web'. There are buttons to '+ Add Condition' and 'Remove All'. Below the conditions, there's a checkbox labeled 'Active' which is checked. A red box and arrow point to this checkbox. At the bottom right, there are buttons for 'Cancel', 'Previous', and 'Save'.

Figure 15: Activate Rollup

Finally, the user needs to click on the **Save** button to save all the operations performed so far and create the action record.



This screenshot is similar to the previous one, showing the 'Create Rollup' dialog box. The conditions and the 'Active' checkbox (which is checked) are the same. However, in this image, a red box and arrow point to the 'Save' button at the bottom right of the dialog, indicating the next step in the process.

Figure 16: Save Rollup



## Landing Page

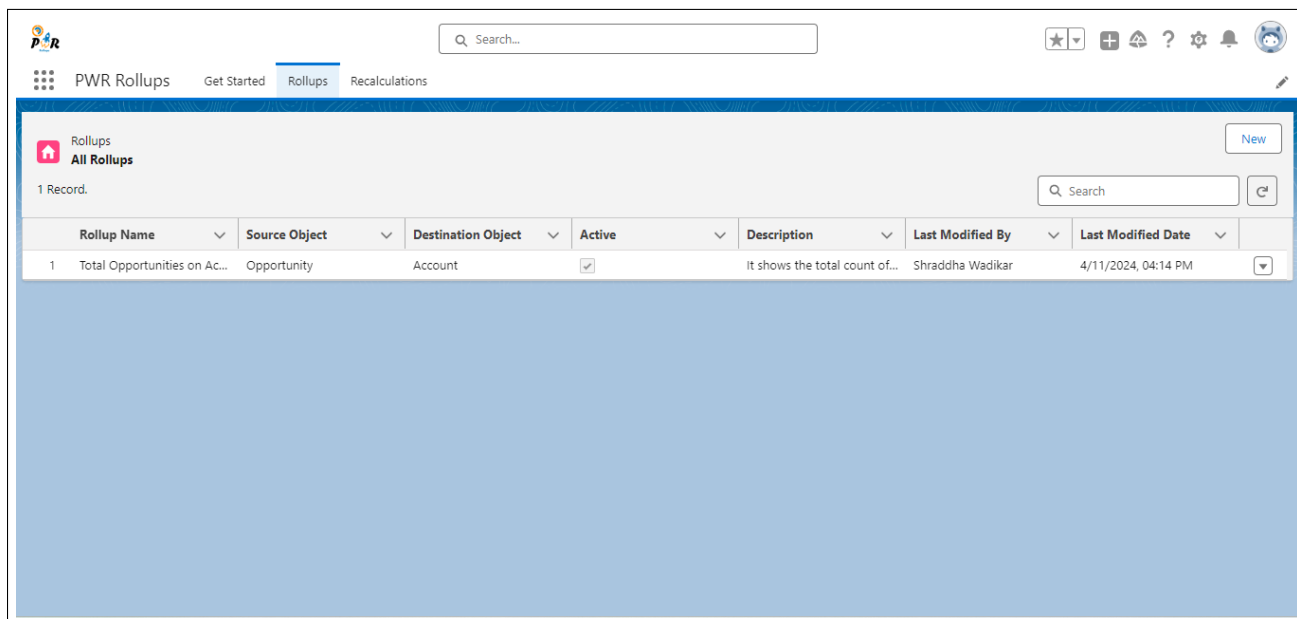
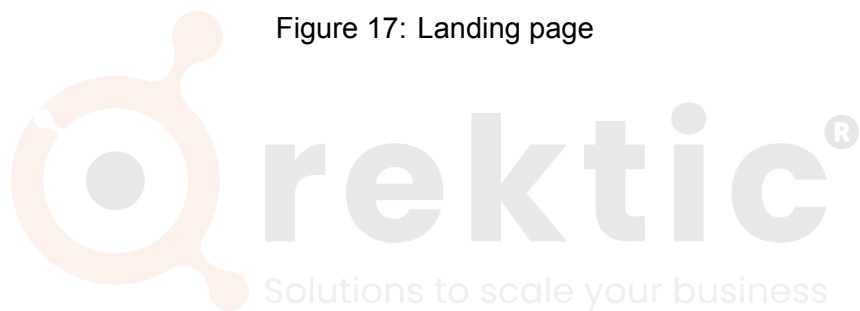


Figure 17: Landing page



## V.IV.1 Rollup Actions

**V.IV.1.1 Show Versions:** After every edit operation on rollup, it creates a new version of it, so even if you need the previous Rollup you can access it from there.

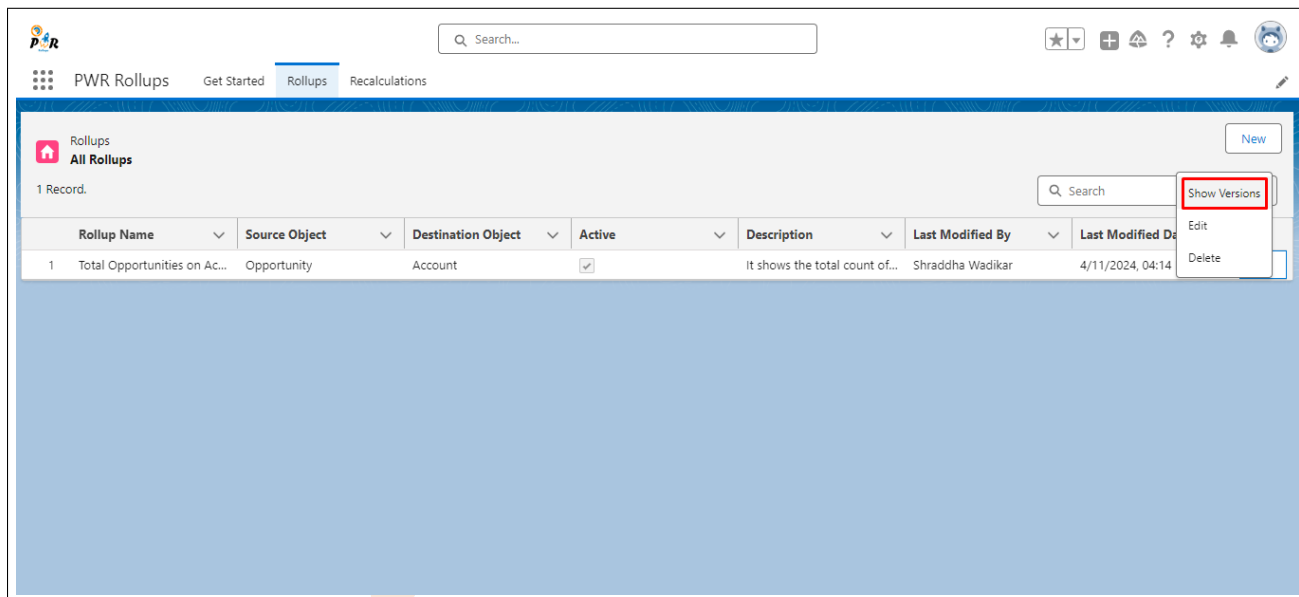


Figure 18: Show Versions

**V.IV.1.2 Edit:** If the user wants to edit the existing action click on Edit. But a user can edit only the Label, and Description on the first page and add, and remove roll-up types, and custom filters on the next page. However, the user cannot edit the previously defined object path.

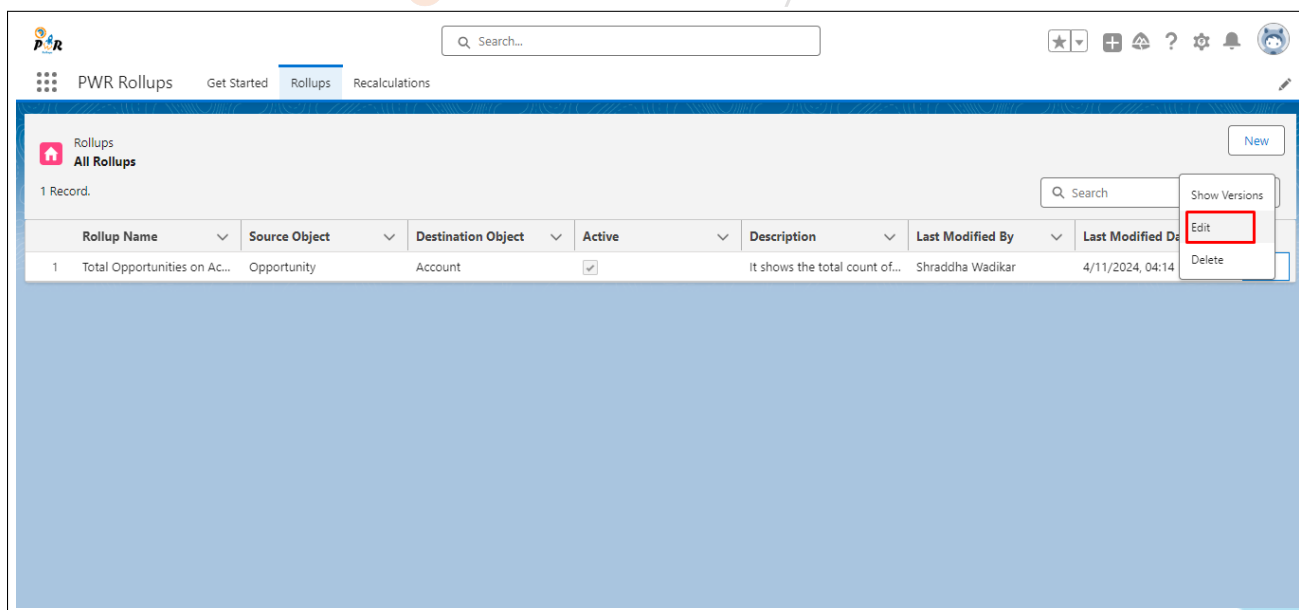


Figure 19: Edit Rollup Functionality



**V.IV.1.3 Delete:** If the user wants to delete the existing rollup action, click on Delete. This will permanently delete the rollup and its versions.

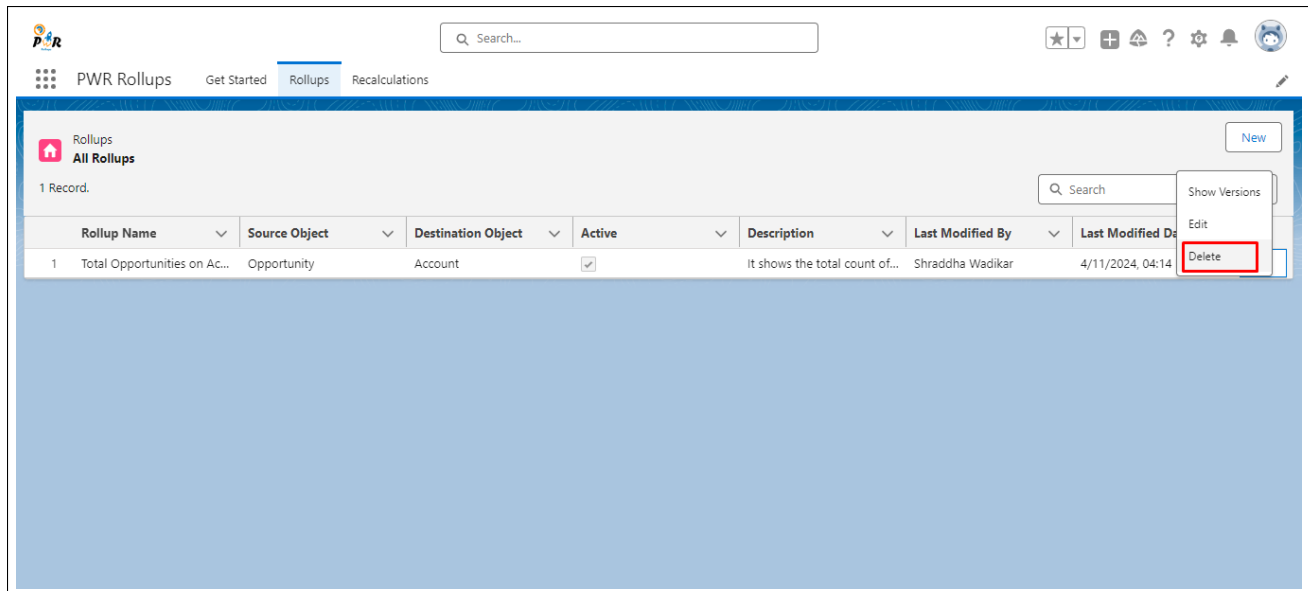


Figure 20: Delete Rollup Functionality





**V.IV.1.4 Recalculations:** Recalculation functionality is used when the user wants to perform a rollup operation on legacy data. After recalculating, the user can see rollup result data populated on all existing records.

If the user needs to calculate the newly created action on the existing records then select the recalculation option and can apply the custom filter to identify which records the user wants to consider for the recalculation operation.

To create a recalculation record for a particular rollup, click on the New button on the recalculation homepage.

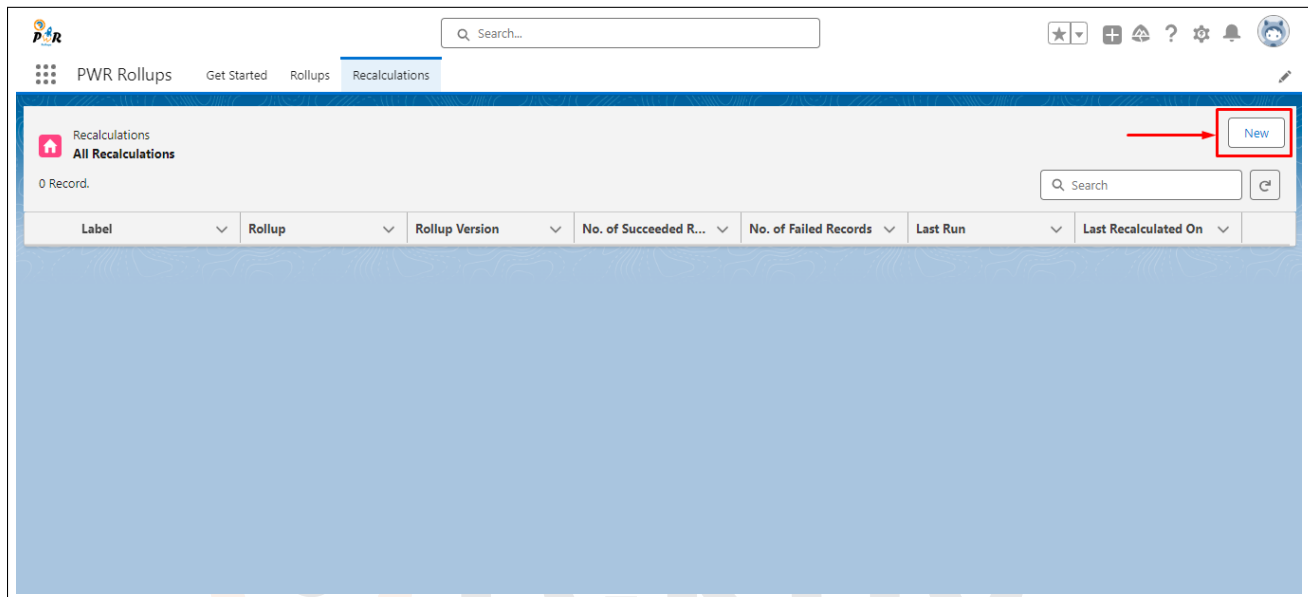


Figure 21: Creation of Recalculation Record

Select the Rollup by clicking on the 'Rollups' watermark. Here you can select the rollup on which you want to perform the recalculation action.

Note: Only the active rollups list will be displayed in this field. The label and the name of the recalculation record will be auto-populated as per the name of the selected rollup.



Figure 22: Creation of Recalculation Record

After selecting the rollup, enter the appropriate batch size to perform the recalculation on existing records.

Note: Batch size will be 200 by default. Users can change the batch size up to 2000.

Figure 23: Creation of Recalculation Record

Users can add custom filters to filter out the precise records by clicking on “Add Condition” considering the recalculation action.

Here, the user can add the custom filter based on the destination object of the rollup.



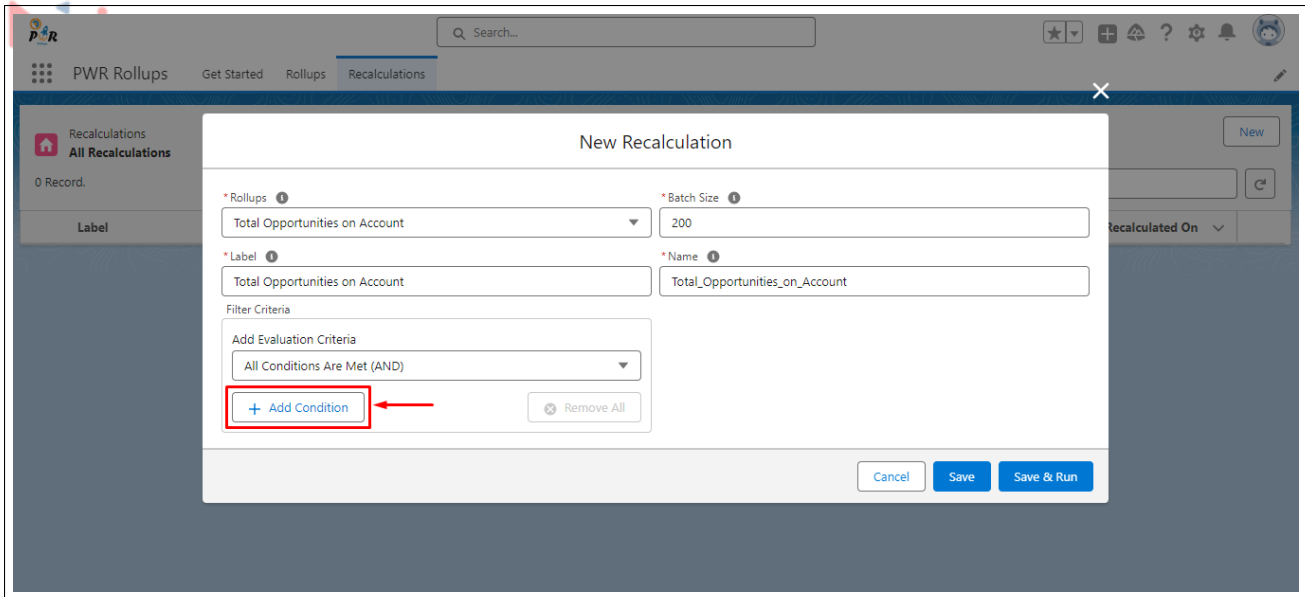


Figure 24: Creation of Recalculation Record

If the user adds multiple filters then we can apply logical conditions to it.

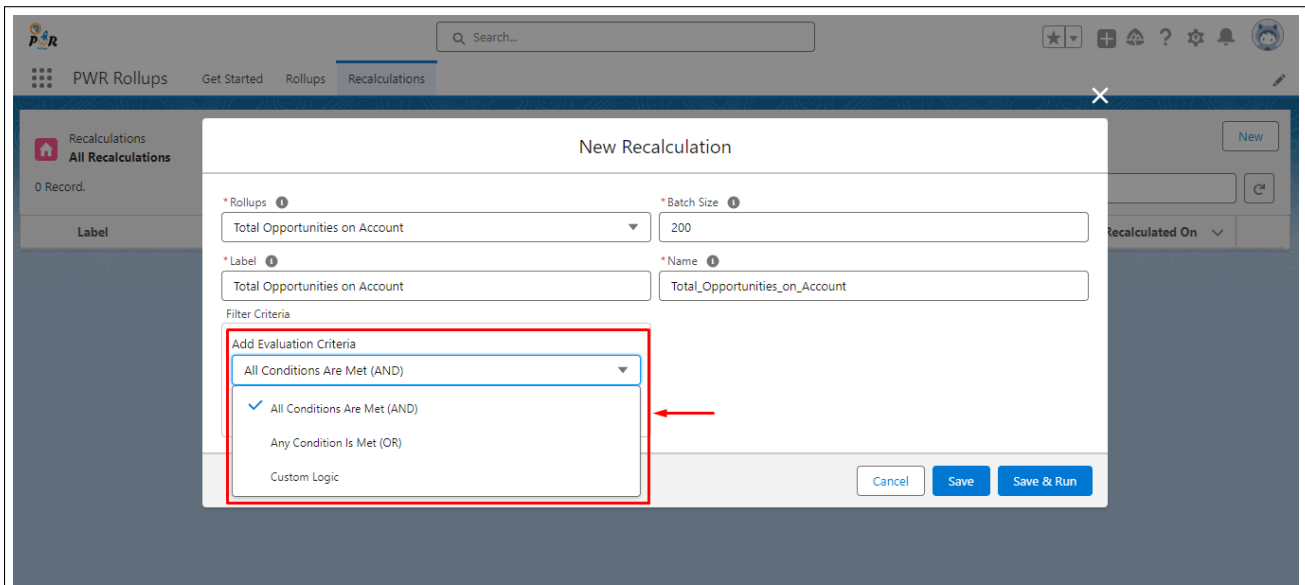


Figure 25: Creation of Recalculation Record

Finally, the user needs to click on the Save button to save all the details and create a recalculation record.



The screenshot shows the 'New Recalculation' form in the PWR Rollups application. The form is titled 'New Recalculation' and contains several input fields. The 'Rollups' field is set to 'Total Opportunities on Account'. The 'Batch Size' field is set to '200'. The 'Label' field is set to 'Total Opportunities on Account'. The 'Name' field is set to 'Total\_Opportunities\_on\_Account'. The 'Filter Criteria' section shows 'Add Evaluation Criteria' set to 'All Conditions Are Met (AND)'. At the bottom right, there are three buttons: 'Cancel', 'Save', and 'Save & Run'. A red arrow points to the 'Save' button.

Figure 26: Save Recalculation Record

Here user can initiate the recalculation process on the selected rollup while saving the record. By clicking on the “Save & Run” button, the recalculation record will be saved and the recalculation process will initiate at the same time.

The screenshot shows the 'New Recalculation' form in the PWR Rollups application. The form is titled 'New Recalculation' and contains several input fields. The 'Rollups' field is set to 'Total Opportunities on Account'. The 'Batch Size' field is set to '200'. The 'Label' field is set to 'Total Opportunities on Account'. The 'Name' field is set to 'Total\_Opportunities\_on\_Account'. The 'Filter Criteria' section shows 'Add Evaluation Criteria' set to 'All Conditions Are Met (AND)'. At the bottom right, there are three buttons: 'Cancel', 'Save', and 'Save & Run'. A red arrow points to the 'Save & Run' button.

Figure 27: Save &amp; Run of Recalculation Record



## Landing Page

Recalculations

All Recalculations

1 Record.

Label	Rollup	Rollup Version	No. of Succeeded R...	No. of Failed Records	Last Run	Last Recalculated On
1 Total Opportunities on Ac...	Total Opportunities on Ac...	v1	37	0	Total Opportunities on Ac...	4/10/2024, 06:30 PM

Figure 28: Landing Page



## V.IV.2 Recalculation Actions

**V.IV.2.1 Run Now:** After saving the recalculation record, the user needs to click on the “Run Now” action which will initiate the recalculation process on the selected rollup.

Here user can click the “Run Now” action whenever he wants to perform the recalculation process for the selected rollup.

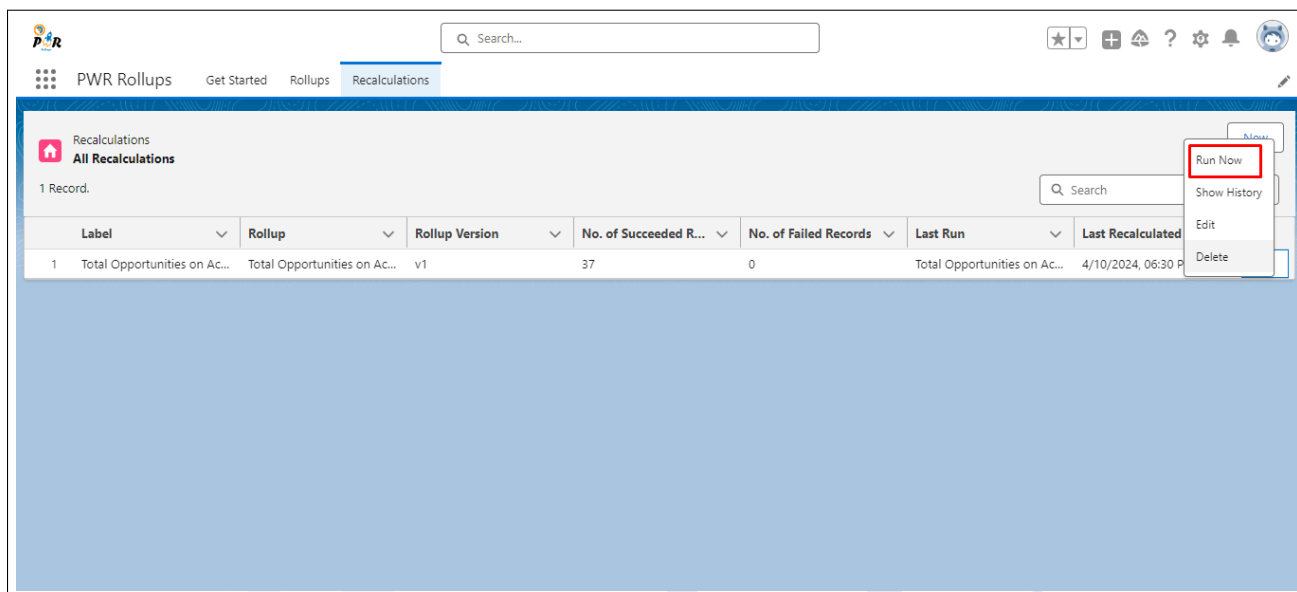


Figure 29: Run Now action

After the successful completion of the recalculation process, legacy data will be updated accordingly.

**V.IV.2.2 Show History:** Here, the user can see the history of the performed recalculation process. The user needs to click on the “Show History” action. This history will contain the status, no of succeeded records, no of failed records, and version of the rollup on which recalculation is done.

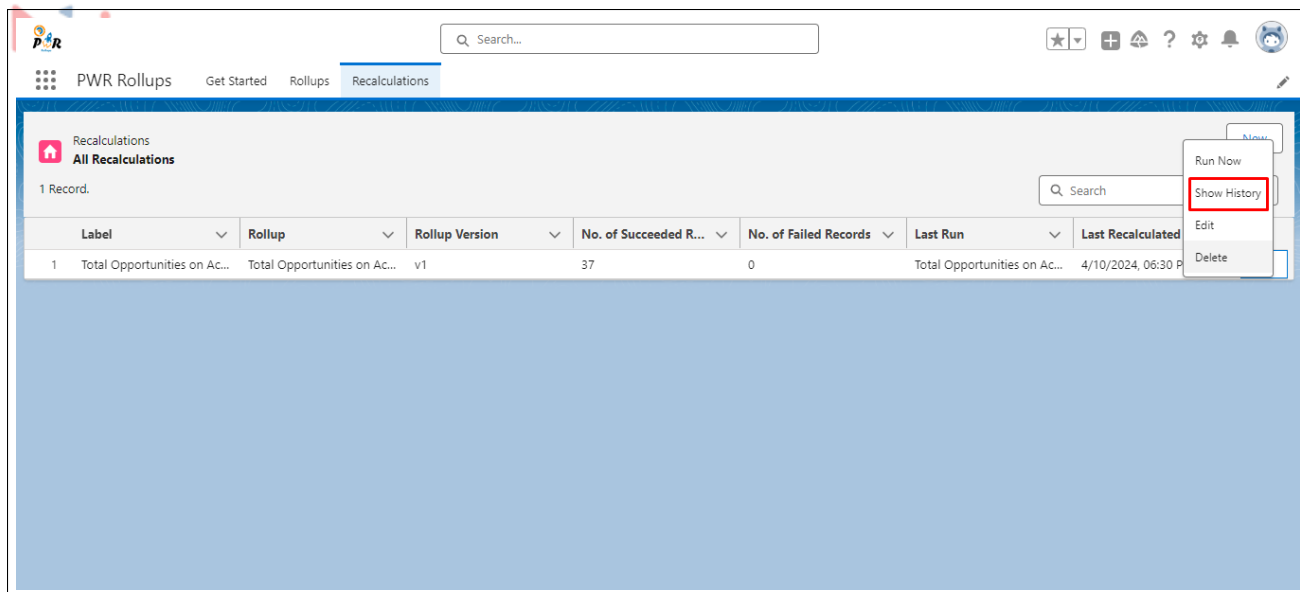


Figure 30: Show History action

**V.IV.2.2.1 Retry:** During the recalculation process, if some records fail to update the legacy data, then the status of that particular recalculation process will be Failed. If a user wants to do recalculation again then he needs to click on the “Retry” action.

By clicking on this action, the recalculation process will be done again only for those records which were failed in the previous recalculation process.

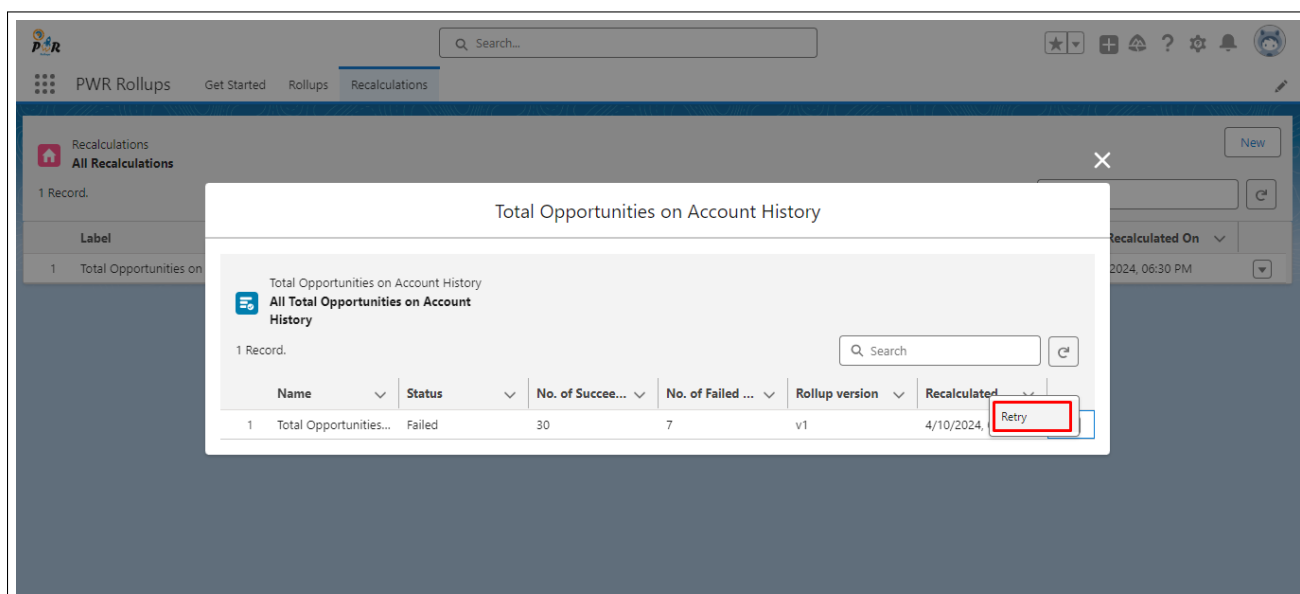


Figure 31: Retry action

**V.IV.2.3 Edit:** If the user wants to edit the existing action click on Edit. However, a user can edit only the Label, Batch Size and custom filters of particular recalculate record. However, the user cannot edit the selected rollup.

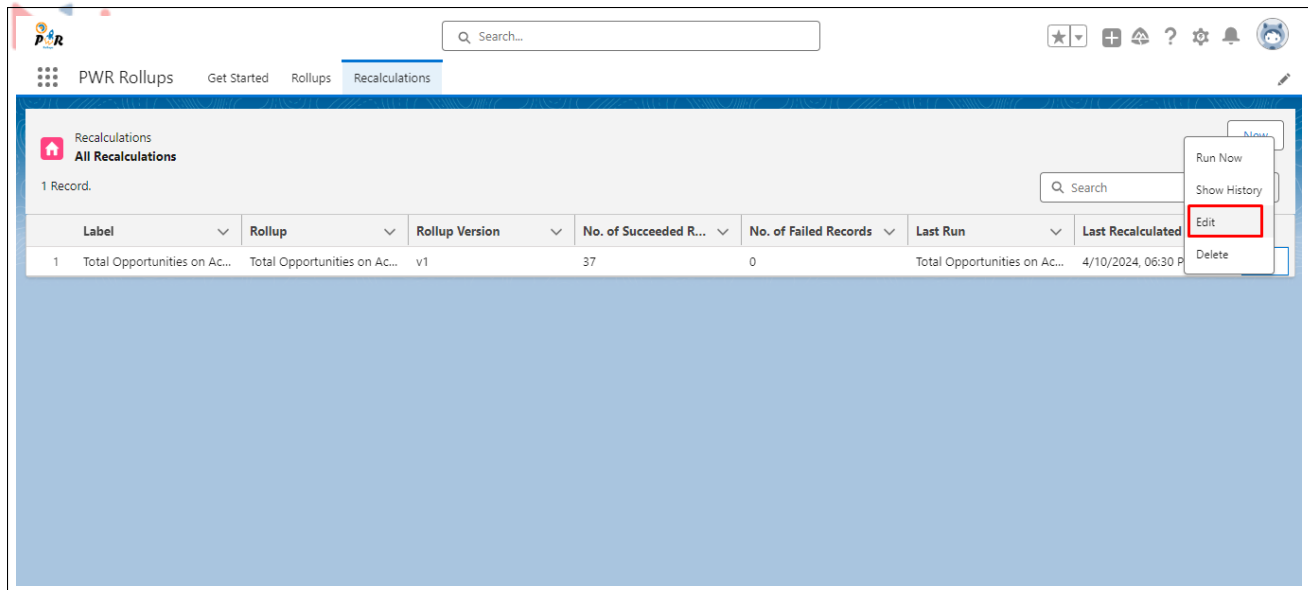


Figure 32: Edit Recalculation Record

**V.IV.2.4 Delete:** If the user wants to delete the existing recalculate record, click on Delete. This will permanently delete the recalculate record and its history.

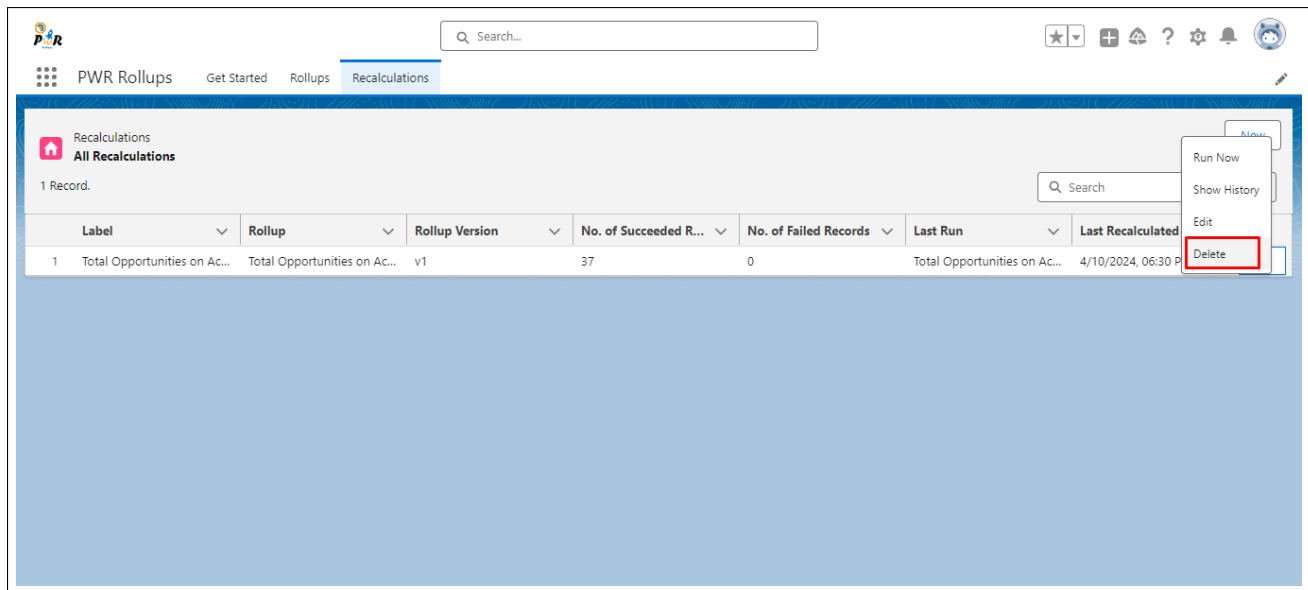


Figure 33: Delete Recalculation Record

**Note:** It may take time to recalculate existing records. So the user doesn't need to stay on the same page, once the recalculation procedure is completed the application sends an email to the user who initiated the recalculation process.



## VI Schedule Rollup

For the recalculation process, the user can schedule the recalculation process as per his specific date and time. With the provided details, recalculation for the given rollup will be done as per the scheduled date and time. For scheduling the recalculation process, the user needs to create a **“Schedule-Triggered Flow”** for it. Please follow the following steps:

1. Create a Schedule-Triggered Flow.
2. Set the date, time, and frequency as per your requirements.
3. Create one record of the “Rollup Recalculation Event” object.
4. Provide the API name of the rollup recalculation record to the Rollup Recalculation Name field of the “Rollup Recalculation Event” object.





## VII Contact Us

For more information visit [www.orektic.com](http://www.orektic.com)

You can also schedule a product demo to know more about **PWR Rollups** simply by filling out the form [here](#)

If you have any concerns or queries then please contact us at [support@orektic.com](mailto:support@orektic.com)

