

Roll-up Fields

A **roll-up** field is a custom field that contains an aggregate value calculated over the opportunity records related to a specific opportunity record. For example, **roll-up** fields in a parent opportunity will encompass all amounts recorded in their respective child opportunities.

Roll-up fields will only display in the parent opportunity. If an opportunity does not have a child opportunity associated to it, these custom values will not appear.

The Four Types of roll-up fields

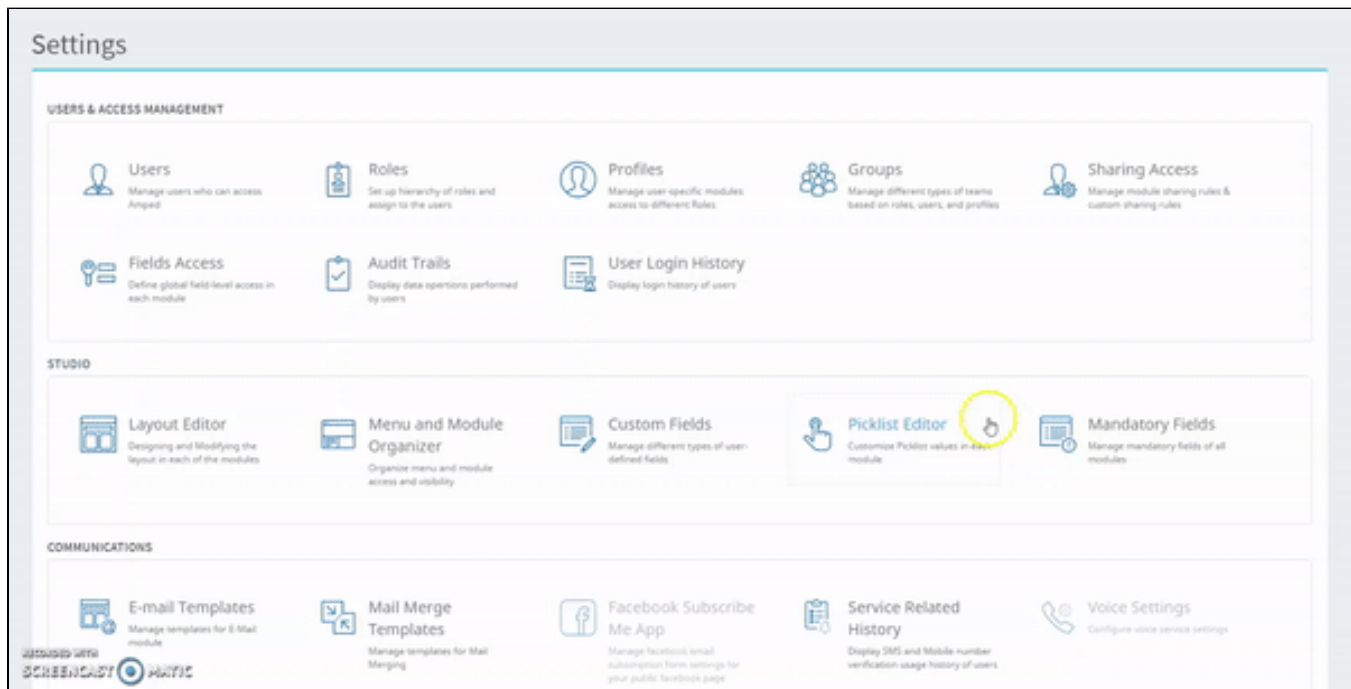
Remaining Amount – The **Remaining Amount** Field represents the difference between the Parent Opportunity's Amount and the **Child Closed Won Amount** (the total Amount sum of all closed won child opportunities connected to a parent opportunity). For example, if a parent opportunity's amount is \$1000 and the **Child Closed Won Amount** is \$750, the **Remaining Amount** value will be \$250.

Child Open Amount – The **Child Open Amount** represents the total Amount sum of all open child opportunities connected to a parent opportunity. For example, if a parent opportunity has two open child opportunities – one whose amount is \$500 and one whose amount is \$200 – the **Child Open Amount** of the parent opportunity will be \$700.

Child Closed Won Amount - The **Child Closed Won Amount** represents the total Amount sum of all closed won child opportunities connected to a parent opportunity. For example, if a parent opportunity has two open child opportunities – one whose amount is \$400 and one whose amount is \$200 – the **Child Closed Won Amount** of the parent opportunity will be \$600.

Child Closed Lost Amount - The **Child Closed Lost Amount** represents the total Amount sum of all closed won child opportunities connected to a parent opportunity. For example, if a parent opportunity has two closed lost child opportunities – one whose amount is \$700 and one whose amount is \$200 – the **Child Closed Won Amount** of the parent opportunity will be \$900.

How to Create a roll-up field:



To create a **roll-up** field:

1. Go to **Admin Settings** > scroll down and click on **Custom Field Settings** > make sure you have the **Opportunities** module selected > and then click on **Add New +**
2. The **Create Custom Field** window will appear. In the **Select Field Type**: picklist, pick **Roll-Up** Two values distinct to the Roll-Up Summary will appear: **Select Roll-Up Type** and **Display in Card View**.
3. Label the custom field a label that will help you identify the value (i.e. a roll-up field that with a **Child Open Amount** type may be labeled **Child Open Amount**.
4. Set the **Select Roll-Up Type** to the respective type (**Remaining Amount**, **Child Open Amount**, **Child Closed Won Amount**, **Child Closed Lost Amount**).
5. **Display in Card View** is an optional choice; checking off this option will display the value in the header of a parent opportunity.
6. Click **Save** and your custom field should now be saved.

Roll-up Field Example

Below is an example of roll-up fields in action. In this example, all four roll-up types were created from Custom Fields and all were checked off to display in Card View – the header of the parent opportunity.

1

Parent Opportunity

FORECAST STAGE

Pipeline

8 minutes 38 seconds

FORECASTED TIME

8 minutes 38 seconds

AMOUNT

\$1500.00

CHILD OPEN AMOUNT

\$500.00

REMAINING AMOUNT

\$750.00

CHILD CLOSED WON AMOUNT

\$750.00

SALES STAGE

Prospecting

CHILD CLOSED LOST AMOUNT

\$250.00

EXPECTED CLOSE DATE

March 31, 2021

OPPORTUNITY HIERARCHY

| Opportunity | Account Name | Sales Stage | Forecast Stage | Amount | Expected Close Date | Owner |
|------------------------|--------------|-------------|----------------|---------|---------------------|-------------|
| Parent Opportunity | Google | Prospecting | Pipeline | 1500.00 | 03-31-2021 | Bruce Wayne |
| .. Child Opportunity 2 | Google | Closed | Closed Lost | 250.00 | 03-31-2021 | Bruce Wayne |
| .. Child Opportunity 3 | Google | Prospecting | Pipeline | 500.00 | 03-31-2021 | Bruce Wayne |
| .. Child Opportunity 1 | Google | Closed | Closed Won | 750.00 | 03-31-2021 | Bruce Wayne |

There is one parent opportunity with three child opportunities. A couple of things to note:

- The **Amount** value in the header is the **Amount** field value recorded in the parent opportunity.
- The **Child Open Amount** is the sum of all Amount values from open child opportunities – in this case, it is the **Amount** from the **Child Opportunity 3**
- The **Child Closed Won Amount** is the sum of all Amount values from closed won child opportunities – in this case, it is the **Amount** from the **Child Opportunity 1** amount
- The **Child Closed Lost Amount** is the sum of all Amount values from closed lost child opportunities – in this case, it is the **Amount** from the **Child Opportunity 2** amount
- The **Remaining Amount** is the difference of the **Amount** (\$1,500) and **Child Closed Won Amount** (\$750), resulting in a value of \$750.
****Child Closed Lost Amount is not included in the calculation for Remaining Amount**