



Rollup Field

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A rollup field type helps in obtaining the aggregate value of several pieces of data that are relevant to a specific record. It performs quick calculations and computes formulas through data linked across tables.

The screenshot displays the Zoho CRM interface. At the top, there are tabs for 'Record Height', 'Color', and 'Fields'. The 'Fields' tab is active, showing a dropdown menu with various field types. The 'Rollup' option is highlighted with a black arrow. The background shows a table with a 'Role' column containing values like Manager, Associate, and Analyst.

Role
Manager
Associate
Manager
Analyst
Analyst
Associate
Manager
Analyst
Manager
Associate

Fields dropdown menu options:

- Find a field
- Modified Time
- Number
- Percentage
- Phone number
- Rating
- Rollup
- Single Select
- Text
- URL

Note: To use rollup field, the tables need to be linked using the Link field type.

How & When to use a Rollup Field?

Let's consider the below-shown sales lead tracking table as an example.

Table 1 - Leads-July: shows a list of leads obtained from various sources

Tables

Sales_New

Search in View

Share

4

Log

Leads-July

Reps

+

Views

+

View 1

:

Sort

Filter

Record Height

Color

Fields

+

Add Record

	Company	Primary Contact	Email	Source of	Lead Type	Assigned To	Status	Pipeline	Closure Value	Link to Reps_copy
1	ATC Industries	Richard Miller	richie@email.com	LinkedIn	New	Lewis Clarke	Quote shared	\$ 20,000.00		
2	SoftTech Solutions	Chris Smith	chris@email.com	Newsletter	Existing Customer	Hannah Campbell	Closed - Won	\$ 65,800.00	\$ 64,250.00	
3	GG Enterprises	Mary Carter	mary@email.com	LinkedIn	New	Hannah Campbell	Evaluation	\$ 92,347.00		
4	CKC Corporation	Linda Jones	linda.jones@email.com	LinkedIn	New	Harris Townsend	Negotiation	\$ 12,939.00		
5	Andrew's Digital Agency	Roger Davis	roger@email.com	Google Ads	New	Rachel Rivera	Quote shared	\$ 73,947.00		
6	Moonlight Technology	Liz Adams	liz@aail.com	Facebook	New	John Sidwell	Quote shared	\$ 64,816.00		
7	Cupcake LLC	Rachel Greene	rachelg@email.com	Facebook	New	Dave Wright	Evaluation	\$ 91,270.00		
8	E Corp	Tom Fernandez	tom@email.com	Newsletter	Existing Customer	Harry Simons	Closed - Won	\$ 28,338.00	\$ 27,000.00	
9	Halos Inc	Henry Lee	henry@email.com	Facebook	New	Rachel Rivera	Evaluation	\$ 12,730.00		
10	Macmilan & Co	Jo Wilson	jowilson@email.com	LinkedIn	New	Lewis Clarke	Negotiation	\$ 19,738.00		
11	Oswald & Associates	Noah Clark	noah@email.com	Newsletter	Existing Customer	Harry Simons	Closed - Won	\$ 49,290.00	\$ 49,290.00	
12	Paper Boat Beverages	Mirinda Scott	mirinda@email.com	Newsletter	Existing Customer	Harry Simons	Closed - Won	\$ 39,740.00	\$ 39,700.00	
13	Baby Corp	Jennifer Hill	jenn@email.com	Google Ads	New	Dave Wright	Quote shared	\$ 82,634.00		
14	Estell Talent Agency	Emily Casper	emily@email.com	Facebook	New	Lewis Clarke	Evaluation	\$ 77,927.00		
15	Springfield Tech	Stephen Young	stephen@email.com	Newsletter	Existing Customer	John Sidwell	Closed - Won	\$ 91,273.00	\$ 90,200.00	
Type here to create a record										
+ 5										

Table 2 - Reps: shows the details of sales reps handling each lead.

Tables

Sales_New

Search in View

Share

4

Log

Leads-July

Reps

+

Views

+

View 1

:

Sort

Filter

Record Height

Color

Fields

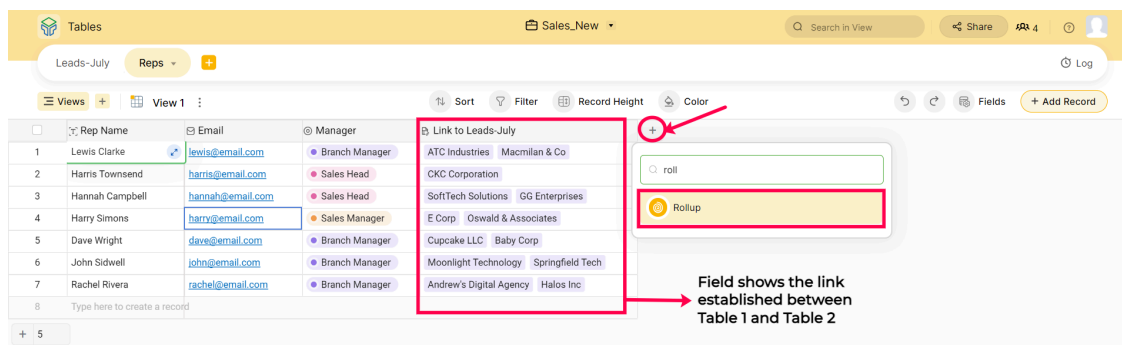
+ Add Record

	Rep Name	Email	Manager	Link to Leads-July		
1	Lewis Clarke	lewis@email.com	Branch Manager	ATC Industries	Macmilan & Co	
2	Harris Townsend	harris@email.com	Sales Head	CKC Corporation		
3	Hannah Campbell	hannah@email.com	Sales Head	SoftTech Solutions	GG Enterprises	
4	Harry Simons	harry@email.com	Sales Manager	E Corp	Oswald & Associates	
5	Dave Wright	dave@email.com	Branch Manager	Cupcake LLC	Baby Corp	
6	John Sidwell	john@email.com	Branch Manager	Moonlight Technology	Springfield Tech	
7	Rachel Rivera	rachel@email.com	Branch Manager	Andrew's Digital Agency	Halos Inc	
8	Type here to create a record					
+ 5						

If you're working on Table 2 and need to see the total sales value achieved by each sales rep, all you have to do is enable the rollup field type in Table 2. The rollup field type will collect all the closure values by each rep in each account and it will display the sum of closure values by each rep in the relevant records.

Step 1: Choose where you want to add a new field. This field will display the data pulled from other tables. Add a new field and **choose Rollup** from the list of available field types.

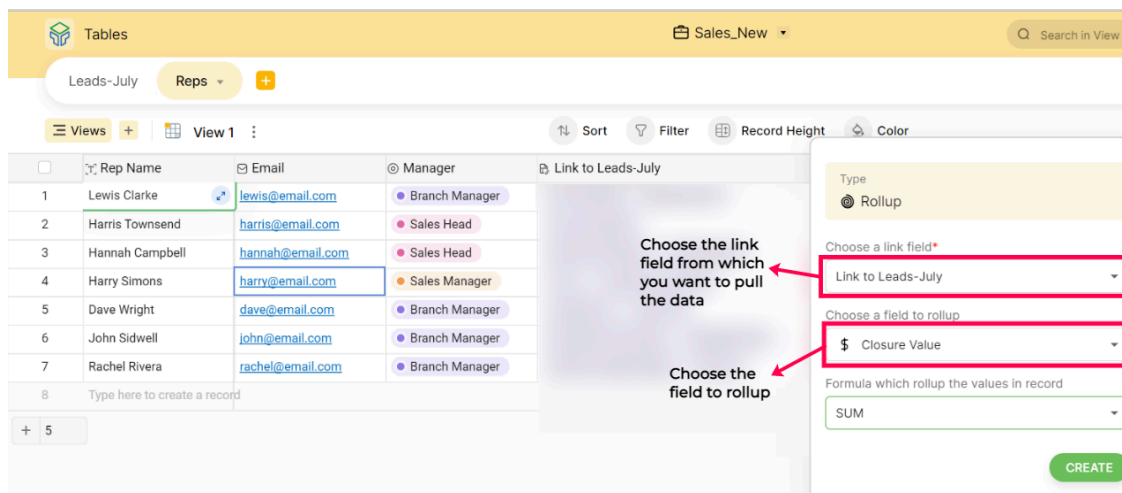
In this example, a rollup field is added in Table 2 in order to calculate the total sales value closed by each rep.



Step 2: In case you have multiple linked fields, you also have to choose the **linked field** from which you want to perform the calculation.

Step 3: Choose the field to perform the rollup

In this example, the chosen **linked field** is referring to **Tables 1 - Leads-July** and the **field to rollup** is **Closure Value**.



Step 4: Now, choose from the available **formula** suggestions to roll up data from the linked records. The options for formula vary according to the data type in the chosen field.

In the example, the SUM function is chosen to calculate the total sales closure value by each representative.

Step 5: Click **Create**

Type

Rollup

Choose a link field*

Link to Leads-July

Choose a field to rollup

\$ Closure Value

Formula which rollup the values in record

SUM

COUNT BLANK

AND

OR

XOR

AVERAGE

MAX

MIN

SUM

CREATE

This option lets you choose a type of function you want to apply to the data

Upon clicking the **Create** button, you can see that the data are collected from Table 1 through the linked field "Links to Leads-July" and the sum of the closure value achieved by each rep is calculated and displayed in their respective record.

Rep Name	Email	Manager	Link to Leads-July	Closed Sales Value
Lewis Clarke	lewis@email.com	Branch Manager	ATC Industries Macmillan & Co Estell Talent Agency	\$ 0.00
Harris Townsend	harris@email.com	Sales Head	CKC Corporation	\$ 0.00
Hannah Campbell	hannah@email.com	Sales Head	SoftTech Solutions GG Enterprises	\$ 64,250.00
Harry Simons	harry@email.com	Sales Manager	E Corp Oswald & Associates Paper Boat Beverages	\$ 115,990.00
Dave Wright	dave@email.com	Branch Manager	Cupcake LLC Baby Corp	\$ 0.00
John Sidwell	john@email.com	Branch Manager	Moonlight Technology Springfield Tech	\$ 90,200.00
Rachel Rivera	rachel@email.com	Branch Manager	Andrew's Digital Agency Halos Inc	\$ 0.00

From the reference table illustrated at the beginning of this article, you can see that 5 out of 15 leads have been closed.

Rollup field has retrieved closure values achieved by each rep, calculated the sum of closure value and displayed it in the relevant rep's record. In a nutshell, rollup saves the time and effort that is consumed to switching between tables and manually calculating these values, thus making cross-referencing in fields/tables hassle-free.

Note: A rollup field is read-only. Values displayed in this field cannot be edited. You can add multiple rollup fields on the same table.

ROLLUP FUNCTIONS OVERVIEW

The following are the available functions to summarize your rollup values.

Formula	Supported Field Types	Description	Example
CONCATENATE	Attachment Collaborator Created By Email Link Lookup Multi select Modified By Modified Time Single Select Text URL	Joins values together	CONCATENATE ({value1}, {value2},...) CONCATENATE ("Hello," " ", "World!") --> Hello, World!
COUNT	Available for all field types	Counts and displays the total number of non- empty numeric values	COUNT ({value1}, {value2},...) COUNT("2", "2", "3") --> 3 COUNT ("Marketing", "2", "684397927") --> 2
COUNTA	Available for all field types	Counts and displays the total number of all non- empty values like text, date, attachments, url, etc..	COUNTA ({value1}, {value2},...) COUNTA ("Marketing", "2374687938", "23/07/2022") --> 3 COUNTA ("", "47", "Hello, World!") --> 2
COUNT BLANK	Available for all field types	Counts and displays the total number of blank values	COUNT BLANK ({value1}, {value2},...) COUNT BLANK ("", "47", "Hello, World!") --> 1

			COUNT BLANK ("Hello", "47", "World") --> 0
MIN	Autonumber Checkbox Created Time Currency Number Percentage Rating	Returns the smallest value from the numbers	MIN ({value1}, {value2},...) MIN("34", "629", "12") ==> 12
MAX	Autonumber Checkbox Created Time Currency Number Percentage Rating	Returns the largest value of the numbers	MAX ({value1}, {value2},...) MAX("34", "629", "12") ==> 629
AVERAGE	Autonumber Checkbox Currency Number Percentage Rating	Returns the average value of the numbers	AVERAGE ({value1}, {value2},...) AVERAGE ("34", "629", "12") ==> 221.66
AND	Autonumber Checkbox Currency Number Percentage Rating	Returns <i>True</i> if all arguments are true, else returns <i>False</i>	AND ({logical1}, {logical2},...) ==> True (if all values are true) ==> False (if one or more values is/are false)
OR	Autonumber Checkbox Currency Number Percentage Rating	Returns <i>True</i> if anyone of the arguments is true, else returns <i>False</i>	OR ({logical1}, {logical2},...) ==> True (if any of the values is true) ==> False (if none of the values is true)
XOR	Autonumber Checkbox Currency	Returns True if one of the arguments is True	XOR ({logical1}, {logical2},...)

	Number Percentage Rating	Returns False if both the arguments are True or both the arguments are False	==>True (if one of the two arguments is True) ==>False (if both the arguments are <i>True</i> or both the arguments are <i>False</i>)
SUM	Autonumber Checkbox Currency Number Percentage Rating	Returns the sum of the values	SUM ({value1}, {value2},...) SUM ("34", "629", "12") ==> 665