Summary

Group values in report formulas by using the PARENTGROUPVAL and PREVGROUPVAL summary functions.

Did you know that you can calculate relative values for groupings in reports? With summary functions in custom summary formulas, you can!

PARENTGROUPVAL and PREVGROUPVAL

Use `PARENTGROUPVAL` to calculate values relative to a parent grouping. Use `PREVGROUPVAL` to calculate values relative to a peer grouping.

PARENTGROUPVAL

Use this function to calculate values relative to a parent grouping.

Description:	This function returns the value of a specified parent grouping. A "parent" grouping is any level above the one containing the formula. You can only use this function in custom summary formulas for reports.
Use:	**Summary and Joined:** `PARENTGROUPVAL(summary_field, grouping_level)`
	Matrix: `PARENTGROUPVAL(summary_field, parent_row_grouping, parent_column_grouping)`
	Where `summary_field` is the summarized field value, `grouping_level` is the parent level for summary reports, and `parent_row_level` and `parent_column_level` are the parent levels for matrix reports.
Example:	`TOTAL_PRICE:SUM/PARENTGROUPVAL(TOTAL_PRICE:SUM, GRAND_SUMMARY)`
	This formula calculates, for each product, its relative size compared to the grand total. In this example, the report is a summary of opportunities and their products, grouped by `Product Name`.

PREVGROUPVAL

Use this function to calculate values relative to a peer grouping. If there's no previous grouping, the function returns a null value.

Description:	This function returns the value of a specified previous grouping. A "previous" grouping is one that comes before the current grouping in the report. Choose the grouping level and increment. The increment is the number of columns

or rows before the current summary. The default is 1; the maximum is 12. You can only use this function in custom summary formulas for reports.

Use:	`PREVGROUPVAL(summary_field, grouping_level [, increment])`

Where `summary_field` is the name of the grouped row or column, `grouping_level` is the summary level, and `increment` is the number of rows or columns previous.

Example:	`AMOUNT:SUM - PREVGROUPVAL(AMOUNT:SUM, CLOSE_DATE)`

This formula calculates, for each month, the difference in amount from the previous month shown in the report. In this example, the report is an opportunity matrix with columns grouped by `Close Date` and rows by `Stage`.

Example: Three Week Moving Average

To calculate a three-week moving average of opportunity amounts:

```
(OppProductTrends__c.Amount__c:SUM+
PREVGROUPVAL(OppProductTrends__c.Amount__c:SUM,
OppProductTrends__c.as_of_date__c) +
PREVGROUPVAL(OppProductTrends__c.Amount__c:SUM,
OppProductTrends__c.as_of_date__c,2))/3
```

Using Summary Functions

1. Double-click **Add Formula** in the Fields pane.

2. In the Custom Summary Formula dialog, under Functions, select *Summary*.

3. Select `PARENTGROUPVAL` or `PREVGROUPVAL`.

4. Select the grouping level and click **Insert**.

5. Define the formula, including where to display the formula.

6. Click **OK**.

For more information, see "Work with Formulas in Reports" and "Build a Custom Summary Formula" in the Salesforce online help.