

# DLRS - Oct. 20-21, 2021 Sprint

## DAY 1

Time	Activity	Location
12:00 PM - 12:30 PM EST	Introduction with larger group	Sprint Main
12:30 PM - 2:00 PM EST	DLRS: General discussion/compiling of resources with Caroline	DLRS Main
2:00 PM - 3:00 PM EST	Lunch Break	Sprint Main
3:00 - 3:15 PM EST	Regroup	DLRS Main
3:00 PM - 4:30 PM EST (Choose one)	<b>Breakout A:</b> Beginners DLRS Demo with Caroline	DLRS Recipe Breakout Room (A)
	<b>Breakout B:</b> UX/UI Discussion with Melanie <i>-Need someone to do report-back</i>	DLRS Main
4:30 PM - 5:30 PM EST	DLRS Changes to Survey with Caroline	DLRS Main
5:30 PM EST - 6:00 PM EST	Report back	Sprint Main

## DAY 2

Time	Activity	Location
12:00 PM - 12:15 PM EST	Introduction with larger group	Sprint Main
12:15 PM - 12:30 PM EST	Regroup/plans for day	DLRS Main
12:30 PM - 2:00 PM EST (Choose one)	<b>Breakout A:</b> DLRS Recipes with Caroline - write recipes and review responses so far	DLRS Recipe Breakout Room (A)
	<b>Breakout B:</b> Survey promotion with Melanie	UX Breakout Room (B)
2:00 PM - 3:00 PM EST	Lunch	Sprint Main
3:00 PM EST - 3:15 PM EST	Regroup	DLRS Main
3:15 PM EST - 5:00 PM EST (Choose one)	<b>Breakout A:</b> DLRS Recipes with Caroline	DLRS Recipe Breakout Room (A)
	<b>Breakout B:</b> Survey data analysis with Melanie	UX Breakout Room (B)
5:00 PM EST - 6:00 PM EST	Report back	Sprint Main

## Links

[Artifact Doc](#)

[UX/UI Survey](#)

[UX/UI Aggregated requests](#)

[Recipe Submission](#)

[Recipe Results](#)

[Github Repository](#)

[Kathy's Mock-Up of a new UI](#)

## Sprint Project Team

Name	Organization	What you'd like to work on (Recipes, UX, Docs, etc)
Caroline Renard	Data Geeks Lab	Cookbook and general documentation
Michael Kolodner	Kolodner.com	Anywhere needed
Amanda Styles	Traction on Demand	Anywhere
Hua Ping Tan	Belmar Consulting Group	UX/Docs
Katy Porray	Salesforce	UX/Docs
Melanie Tolomeo	Little Kids Rock	UX
Kathy Olney	Technopath	Cookbox, documentation, development
TJ Warfield	Data Geeks Lab	UX, cookbook
Jodi Nemser-Abrahams	Independent	Anything!
Jared Henning	Salesforce	
Rachel Sinex	Pedal Lucid	
Cheryl Curry	Grounded Network Solutions	

## Day 2 Notes

### Day 2 Report-back - UX/UI

#### What we did:

- Conducted “focus group” and survey to collect feedback
- Categorized feedback by page and theme

### Next Steps:

- Categorize remaining survey results
- Prioritize tickets by level of development effort and interest
- Draw out what the pages may look like

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### **Survey Promotion**

1. Jim Bartek ideas:
  - a. Single posts
    - i. [DLRS Community](#)
    - ii. DLRS Github Issue Sticky
    - iii. [SFXD Discord](#)
    - iv. Good Day Sir Slack
    - v. Ohana Slack
    - vi. Power of Us NPSP Community
  - b. Everyone posts
    - i. Twitter (everyone to help blast it out)
      1. Or Retweet  
<https://twitter.com/MelanieTolomeo/status/1451017890640146433>
    - ii. LinkedIn (everyone to help blast it out)
2. Add to top of DLRS github repo
3. Ask Cori to send to the list of DLRS users?

### **SOCIAL MEDIA BLURB (feel free to customize):**

**TWITTER:** Salesforce peeps! Do you or your clients use Declarative Lookup Rollup Summaries (DLRS)? We'd love for you to take this survey on the DLRS user experience by 10/31... Your feedback may impact future releases! Pls share <https://forms.gle/k4Ub6fBr1heSUTiNA>

Twitter - Optional Image:



## Manage Lookup Rollup Summaries

Manage, Deploy, Run and Schedule

**i** This tab provides the ability to store rollup definitions as **Custom Metadata**. Allowing your rollups to be added to **Change Sets** and **Packages** and are also now automatically cloned during a **Sandbox** refresh. Note that you can also change configuration entered here under the **Setup** menu **Custom Metadata Types** page, however it is recommended you utilise this page as it provides added validation and features. *It may be that your org has rollups defined under the older Lookup Rollup Summaries tab here, it is recommended you move them over.* [Hide this message](#)

Select Lookup Rollup Summary:

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**Information** • Required Information

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Lookup Rollup Summary Name  Lookup Rollup Summary Unique Name

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**Lookup Relationship**

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Parent Object  Relationship Field   
Child Object  Relationship Criteria   
Relationship Criteria Fields

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**Rollup Details**

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Field to Aggregate  Active   
Field to Order By  Calculation Mode   
Aggregate Operation  Calculation Sharing Mode   
Aggregate Result Field   
Aggregate All Rows   
Row Limit

### **LINKEDIN:**

Salesforce peeps!

Do you or your clients use Declarative Lookup Rollup Summaries (DLRS)?

We'd love for you to take this survey on the DLRS user experience by 10/31... Your feedback may impact future releases!

LINK TO SURVEY: <https://forms.gle/k4Ub6fBr1heSUTiNA>

## Day 1 Notes

### How do you find DLRS when you want to install it?

- Google and end up at GitHub
- Blog post and then end up at GitHub
- Dan Donin's blog: <https://dandonin.com/2017/03/16/how-to-dlrs/> plus others with the DLRS label
- [Andyinthecloud](#)

- If you know where install links are, then you know to keep scrolling until you get to them!
- Jared looked at GitHub and got confused trying to find things out.

### **What resources do you use to remember how to schedule and configure rollups and when to use them?**

- Check GitHub wiki for [article that Michael wrote](#) that summarizes when rollups happen and which setting to use
- Use Cases:
  - Need more rollups than standard allows
  - Filtered by relative date
  - Rollups of campaign member details (ie, how many events attended)
  - Rollups from Payments to Opportunity (ie, grant payments due this year) - there are some that come with NPSP but are limited)
  - It's free for real, not just three rollups like Rollup Helper
  - Takes less time than custom code! (Some of us don't have a coder available in the first place!)
  - Records in an hierarchy - rollup Accounts to Parent Accounts.\*\*
  - Charlotte User Group Slides from Amanda: <https://docs.google.com/presentation/d/1liq7QSz7V3ukmrmcjKTUOKN8gWS7BDXd/edit?usp=sharing&oid=110191979094330205155&rtpof=true&sd=true>

### **Undocumented Tips/Tricks (things we've learned)**

- Setting to trigger incremental rollup  
<https://github.com/SFDO-Community/declarative-lookup-rollup-summaries/wiki/What-you-need-to-know-about-Scheduling-Rollups#scheduled-incremental-calculate>
- Go to metadata to clone!!!
- Include schedule in details because otherwise you have to go to scheduled apex to know what the schedule is
- Naming convention for your target fields.
  - (MBK: I always start their API name with "DLRS\_", removing the DLRS part from the label if the field will be shown on page layout. I also clearly note in the Description field that this field is filled by DLRS. If I'm being good, I even put a link to the rollup into the description once it's built. CR:Me too!)
- Naming convention for your rollups
- When doing deployment, only deploy metadata, don't deploy triggers and set up triggers in production.

### **What's confusing / challenges (great opportunity for some documentation!!)**

- Scheduling options - super confusing!
  - "Scheduled" rollup schedule uses an apex job and you can do at certain times. "Schedule Calculate" will give you interface to choose interval and it will schedule a full calculate on schedule you choose and will show up in scheduled jobs
  - Process Builder - when and why to use it (can avoid child trigger)
- Error handling and troubleshooting - what are steps to check of why it's not rolling up

- The fact that you can't see in one convenient place all the rollups that you have scheduled.
- UX Challenges - cannot filter by object or easily sort your filters
- Using details on parent record in criteria for rollup. What it means if you are doing this (ie, will not trigger when parent record is changed, so good to schedule)
- What the heck does the "Relationship Fields" field do?
- Naming convention for rollups
- Knowing what kind of volume is reasonable for DLRS and when it is too much for the tool (and scheduled rollups will never finish)
  - Considerations for LDV Orgs (aka How to Break It)
- When to use first/last and when to use max/min
- What happens if you need to write test coverage and why does this happen (there is a database required field on parent object that isn't being created w/trigger)
- Deployment.
- I'm curious how I could coordinate with TDTM
- Javascript resources for filtering

**Potential for problems (considerations when setting it up - if you don't know about these, your rollups might not work right)**

- Conflicts with NPSP rollups and how to navigate and know what might cause problems
- Conflicts between different jobs running
- Stacked rollups (ie, a rollup from child to parent and then parent to grandparent)
- Field API is changed and rollup not updated
- Triggering off of a change in a related record (you can't do this, but there is nothing preventing you from setting this up) - maybe Process Builder would work for that or Full Calculate schedule would.
- If volume is too high, rollups will never finish

**I'm New - Here's My Story (What I know / Why in the group)**

- Run into limitations of customizable rollups
- Heard a lot of rumble about it \*\*

**Others Interested (Send survey)**

- Sheri Gurock

**DLRS UX/UI 3:15 PM Eastern**

**What do you like?**

- Once you learn how to use it, it's pretty simple to build rollups
- Quick to build
- Free and robust (ie, concatenate unique, relative dates)

- Deployable w/change sets
- Code deploy with a single button
- Ability to set a full calculate schedule
- Ability to do real time and full calculate at the same time

### **What do you not like?**

- When you create a sandbox, rollups are not activated and scheduled, which can break things
- Can't see a list of what rollups are scheduled and when
- Have to know sql/javascript
- What does "Lookup Tools" do? Other than first time you install showing error to set up remote site
- Has legacy tabs that are no longer used
- Can't see a list of rollups - what object it is on, what field it writes to

### **What could be improved?**

- Filtered/sorted list views
- Clone button (outside of going into CMDT)
- Writing the SOQL for the filter (filter creation more like sfdc reports, formula field, npsp customizable rollups)
- The Welcome to DLRS tab is useless after first deploying the Remote Site Setting
- Code to create a target field for you (on the parent object) rather than having to build the field first
- Check that target field API name has not changed (this will break your DLRS)
- Create the api name for rollup similar to salesforce fields - add underscores between each word in the label to create the api name
- Ability to reuse filter criteria?
- Add a note to the target field's description about the target field being populated by DLRS and link to the rollup record
- "Scheduled" Calculation mode & "Scheduled" button - very confusing
- Place to see which rollups have a Schedule Full Calculate set (and when)
- Easy to get out of date; new releases are not pushed into orgs
- A true listview of your rollups, perhaps the ability from that list to set several of them to do a "Full Calculate"
- Why do some use cases need test code - happens with GAU Allocations? - Mike Kikta said it's when you have validation rules on the object.

PAGES - improvements to each page

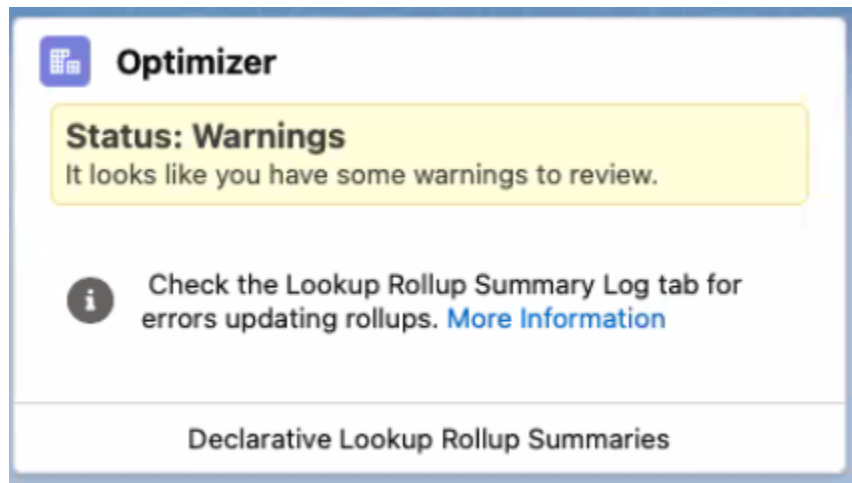
### **Welcome Page**

- Button that links to documentation and other resources (like Hub or Trailblazer community group)
- Overview that explains some basics, like how to call it (also pronounced "Dolores")
- Link to Trailmix that would include things like how to build a SQL query
- Better picture! Maybe something with arrows. There may be a logo coming soon.

- Add “lightningstylesheets = true” to VF Welcome page
- Change Welcome page to Lightning Page with multiple components with links to wiki, documentation, etc.
- Lightning component that does a web callout to pull up new announcements (for new version released)
- Confirmation that the Remote Site Setting is already set up.
- Rename tab
  - DLRS App Settings or Config or something to be more inline with other app tabs (but make sure to include the app name!!! Or Lookup Rollup Summaries Settings - stay consistent with other tabs of app)

### Lookup Rollup Summaries Tools

- What is this tab??? Seems this just be included on Welcome/config or error page
- Optimizer??
  - What does it mean that everything looks good??
  - Warning?



- Dashboard information on what you have configured (# of rollups, active, scheduled, etc..) - add to a Lookup Rollup Summaries Overview tab (
  - Number of rollups
  - Number active
  - Number per object
- Have a single tab for the app that has a tabbed sub menu to make navigation less confusing and harder to miss less-used tabs

### Manage Lookup Page

- standard list view of records of rollups - with a New button as you expect
- Help text for each field

- As noted for the Welcome Page, something that will remind you there has been a new release. (Many veteran users never go to the Welcome page, so these pages are better place to remind people.)
- Indicator if this rollup has been set for a Scheduled Full Calculate
- Indicator if this is a new rollup that has never been calculated
- Call tab “Lookup Rollup Summaries Admin” or “Lookup Rollup Summaries Configuration”
- Change “select lookup rollup summary” to “Select/Create Lookup Rollup Summary”
- Change button names
  - Calculate Now
  - Setup Recurring Calculation
- Add Clone button
- Make it a lighting page
  - Embed the VF page, but allow for rich text fields around VF page with instructions, help, etc
- Pop-up if saving with a Scheduled Calculation Mode - with clarification of what it actually is and confirm Apex is set up
- Calculation Mode
  - Rename Scheduled to Apex Partial Schedule?
  - Need confirmation of what the calculation modes are and what they do
  - “Scheduled” - maybe split into two
    - Scheduled Full Schedule
    - Apex Schedule
  - A warning if you’ve chosen Scheduled mode that you do or do not have the rollupjob Apex set to run
- (note of only 100 scheduled jobs at once total throughout entire instance)
- Turn this into a multiple page - like a wizard for creation - like when you create a new field
  - Page 1 set up basics
  - Page 2 - what calculation mode?
  - Deploy trigger if needed
    - Prompt user to add additional fields with a value if there are any validation rules on the object that are triggered on create, as trigger will fail otherwise (ex: add Percent = 100 to GAU)
  - Schedule calculation
  - Activation as the last step!
- Or tabs on the same page
- Save/Clone/Delete on top
- Move Calculate buttons and Deploy/Manage Trigger to bottom?
- Move Activate checkbox higher up on page
- Or even better: Save and Activate as the last step (with a validation to see if the child trigger has been deployed).
- Have tool check for you if the trigger is already deployed - if it is not deployed and needs to be, have button show up

- New tab to then manage the child triggers for each object?
- Relationship Criteria fields - is this needed? What does it do?
- Make Relationship Criteria field expandable so entire query is visible
- Description field should be at the top. (And maybe required!)
- 

### **Manage/Deploy Child Trigger page**

- Once successful, only way to get out is Cancel!
- Need a Done button that takes you back to the page
- Add text to say something like - This process may take 3-5 min, you can navigate away from this screen without stopping the process

### **Lookup Rollup Summaries Log**

- Rename this to Errors? But it is a log as well.
- Error records themselves to include which rollup actually errored out!
- Edit the default details page layout - remove New Contact, Clone, etc buttons (lightning actions)

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Link to recipe survey responses:

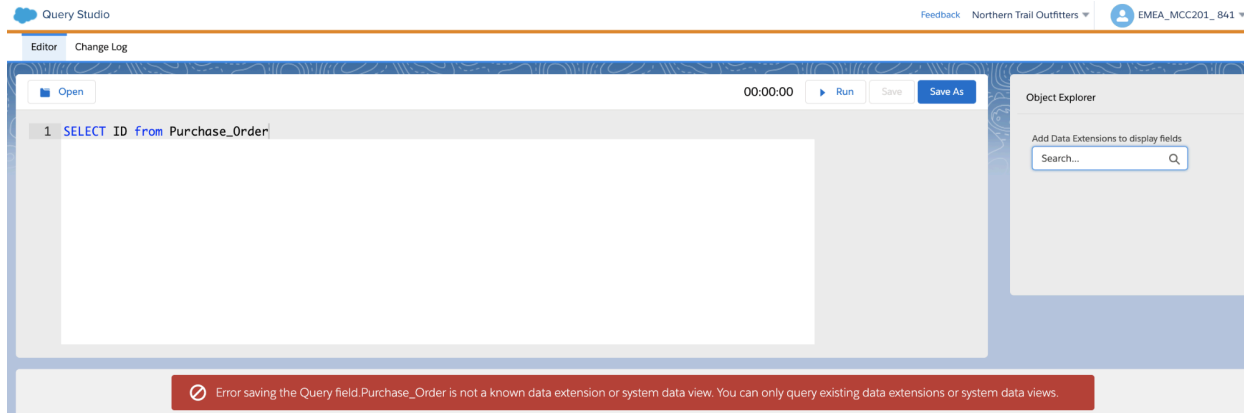
<https://docs.google.com/spreadsheets/d/1uYa-BbYGwjJlqjcnSvicXmy3KATCdzILCFomlHi-f10/e/dit#gid=652819783>

### **Past Notes**

### **Themes**

- Documentation
  - Create best practice repository
    - Install in sandbox and deploy?
  - Benefits of DLRS / documentation about when to use DLRS v. Master-Detail & Roll-up summary v. NPSP Customizable Roll-ups
    - DLRS pro's
      - Additional operator like concatenate strings of text
      - Can use lookup fields (child record doesn't need parent always)
      - Can maintain lookup relationship for record ownership purposes
      - Free and open-source
      - Can invoke in multiple ways
      - Writes code for you which saves money and time
    - DLRS con's/considerations
      - Inaccessible to the average admin

- Governor limits - especially related to other automation occurring on the same fields/objects
  - Front page
    - Make it look more branded & welcoming (for a phase 2)
      - Logo
      - Font
    - Documentation spelled wrong on the Welcome page
    - Button to provide a clear call to action to go to documentation/best practices/etc
    - Create Trailmix for DLRS admins
      - Data modeling:  
[https://trailhead.salesforce.com/en/content/learn/modules/data\\_modeling](https://trailhead.salesforce.com/en/content/learn/modules/data_modeling)
      - SOQL for admins:  
<https://trailhead.salesforce.com/en/content/learn/modules/soql-for-admins>
      - Formulas:  
[https://trailhead.salesforce.com/en/content/learn/modules/point\\_click\\_business\\_logic](https://trailhead.salesforce.com/en/content/learn/modules/point_click_business_logic)
  - Run modes & technical
    - Real-time doesn't always work when merging contacts
    - Knowing when to schedule and when to run in real-time
    - Error handling and making the logs more understandable for admins (without needing knowledge of Apex)
    - How do the Apex Triggers and Classes work?
  - Manage Lookup Rollup Summaries page
    - Dropdown - sorted DLRS's by API name - sort by label instead (Reilly)
    - Including more documentation/tips on the Manage Lookup Rollup Summaries page (something like a path with guidance - maybe to include the wizard)
    - Limits on the relationship criteria field - You hit the text limit on the SQL query. It's restrictive, especially if your API names are long. Is there a reason for the limit?
    - Query editor similar to Marketing Cloud Query Studio



- Updating the wording on the fields to make it more understandable.
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**MOVING THE RECIPES TO THIS DOCUMENT:**

<https://docs.google.com/document/d/1htWO9lqnaWgZPN9-Knlyd1UoWnrGBLYRAcvo3XU7gVI/edit?usp=sharing>