LNG SOLUTIONS

PDF Document Generation in Salesforce

Presented by Andy Lengyel

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Hello,

My name is Andy!

I am here because I love to give presentations about Salesforce.

You can find me at:

andy.lengyel@gmail.com
https://www.facebook.com/androniu.lengyel

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Agenda

1. Problem context
2. Modeling the solution
3. Introducing Lightning Design System
4. Set up your environment
5. Let's code
6. Generate your first PDF document

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1.

Problem Context

“Huston, we have a problem!”

Problem Context

- Generate different PDF documents in Salesforce like price proposals, contracts or other documents for different standard or custom objects.

- Save generated documents as attachments and relate to those objects.

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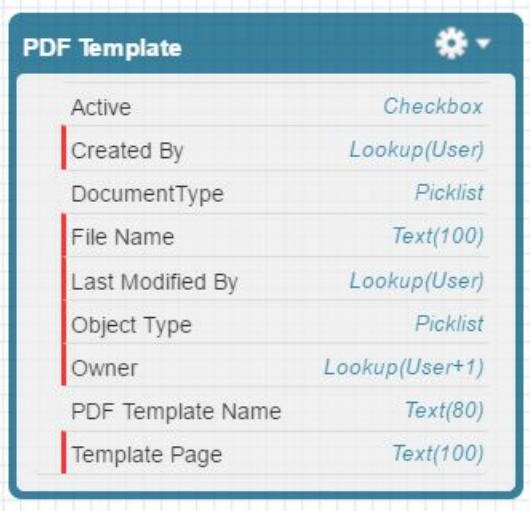
2.

Modeling the Solution

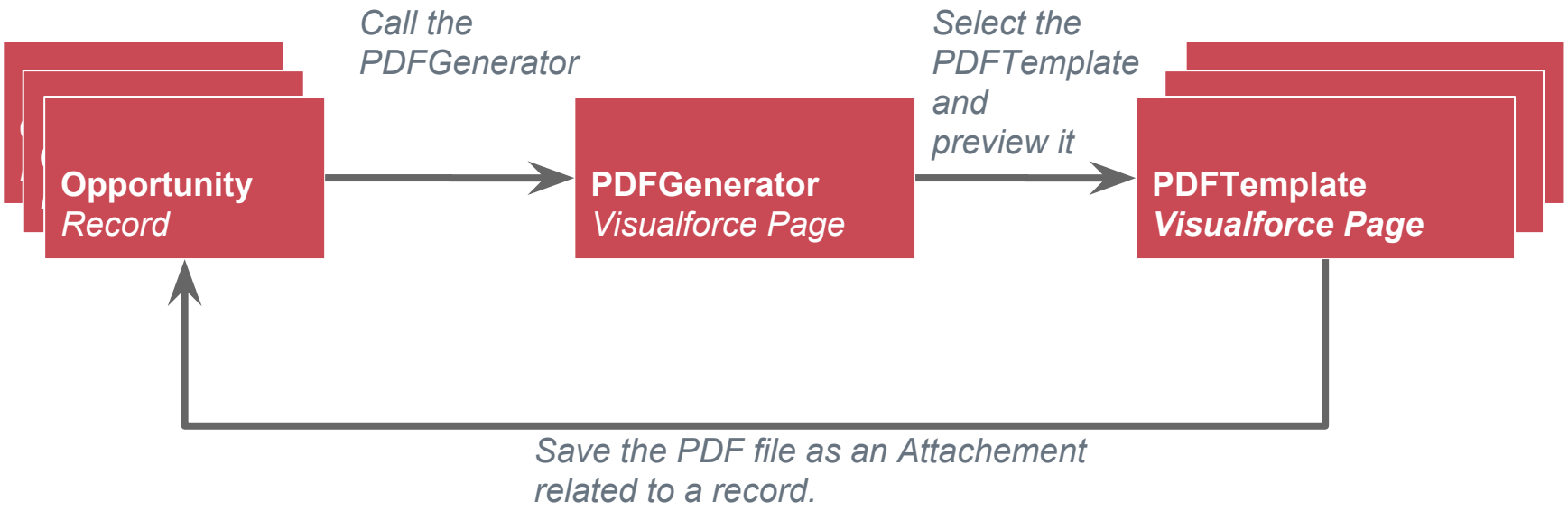
“Modeling isn’t a profession, it’s a lifestyle.”

Custom Object

- **PDFTemplate** - manage records related to PDF templates available
- Fields
  - PDF Template Name
  - File Name
  - Object Type
  - Template Page
  - Active



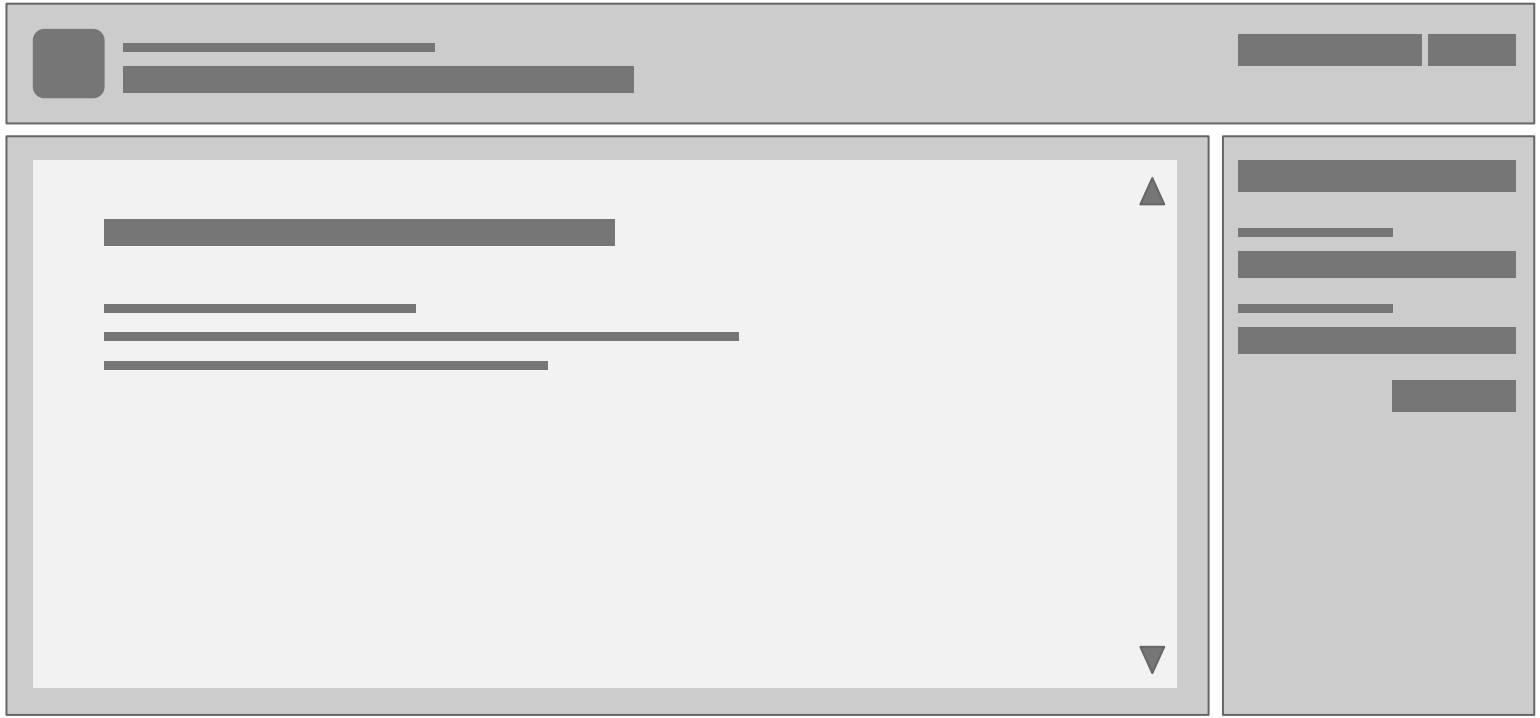
The Flow


Call the PDFGenerator
Select the PDFTemplate and preview it
Opportunity
Record
PDFGenerator
Visualforce Page
PDFTemplate
Visualforce Page
Save the PDF file as an Attachement related to a record.

Visualforce Pages

- **PDFDocumentGenerator** - Visualforce page related to a Salesforce object allowing to generate and attach a PDF's.
- **ProposalTemplate** - Visualforce page related to a Salesforce object that prepare the content of the PDF document.

PDF Generator Layout



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3.

Introducing Lightning Design System

And God said - “Let there be light(ning)!”

SLDS

- Makes it easy for developers to build apps that comply with the new Salesforce Lightning look and feel.
- Is a pre-built CSS framework provided by Salesforce. You do not need to reverse engineer the UI as custom CSS
- Find out more from Salesforce Trailhead:
  https://trailhead.salesforce.com/modules/lightning_design_system
  https://trailhead.salesforce.com/projects/workshop-lightning-design-system-visualforce

SLDS Resources

- **CSS framework** —contains UI components, like page headers, labels, form elements, grid layouts and other visual adjustments.
- **Icons** — Includes different PNG and SVG icons.
- **Font** — Make use of the Salesforce Sans font.
- **Design Tokens** — Design variables that allow you to tailor aspects of the visual design to match your brand.

How it works?

- Add `<apex:slds/>` tag in head of the document or import it under Static Resources and the import the stylesheet in your Visualforce pages

- Add an `<div class="slds-scope">` outer wrapper element to the body of the document

Other approach

- Download the pre-built CSS framework from: https://www.lightningdesignsystem.com/downloads/
- In Salesforce go to Setup and locate Static Resources. Add the ZIP file here.
- Start using it in your Visualforce pages:

```
<apex:stylesheet value="{!URLFOR($Resource.SLDS222,
'assets/styles/salesforce-lightning-design-system.css')}"/>
```

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4.

Prepare your Environment

“First things first!”

Activate your SF Domain

- In Salesforce, go to Company Settings → My Domain.
- Choose your domain name and test for availability.
- Register your Domain

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5.

Let's code

“Talk is cheap. Show me the code!”

What we need to do

- Create the PDFTemplate custom object. Create a Tab for this object and add it into an App.
- Develop the PDF templates as Visualforce pages. You may need additional controllers here. Don’t forget to add `renderAs="PDF"` in page header.
- Develop the PDF generator Visualforce page and controller.
- Add reference Buttons on object page layouts.

Get the code

- Download the full code from GitHub

https://github.com/andylengyel/Salesforce_PDFGenerator

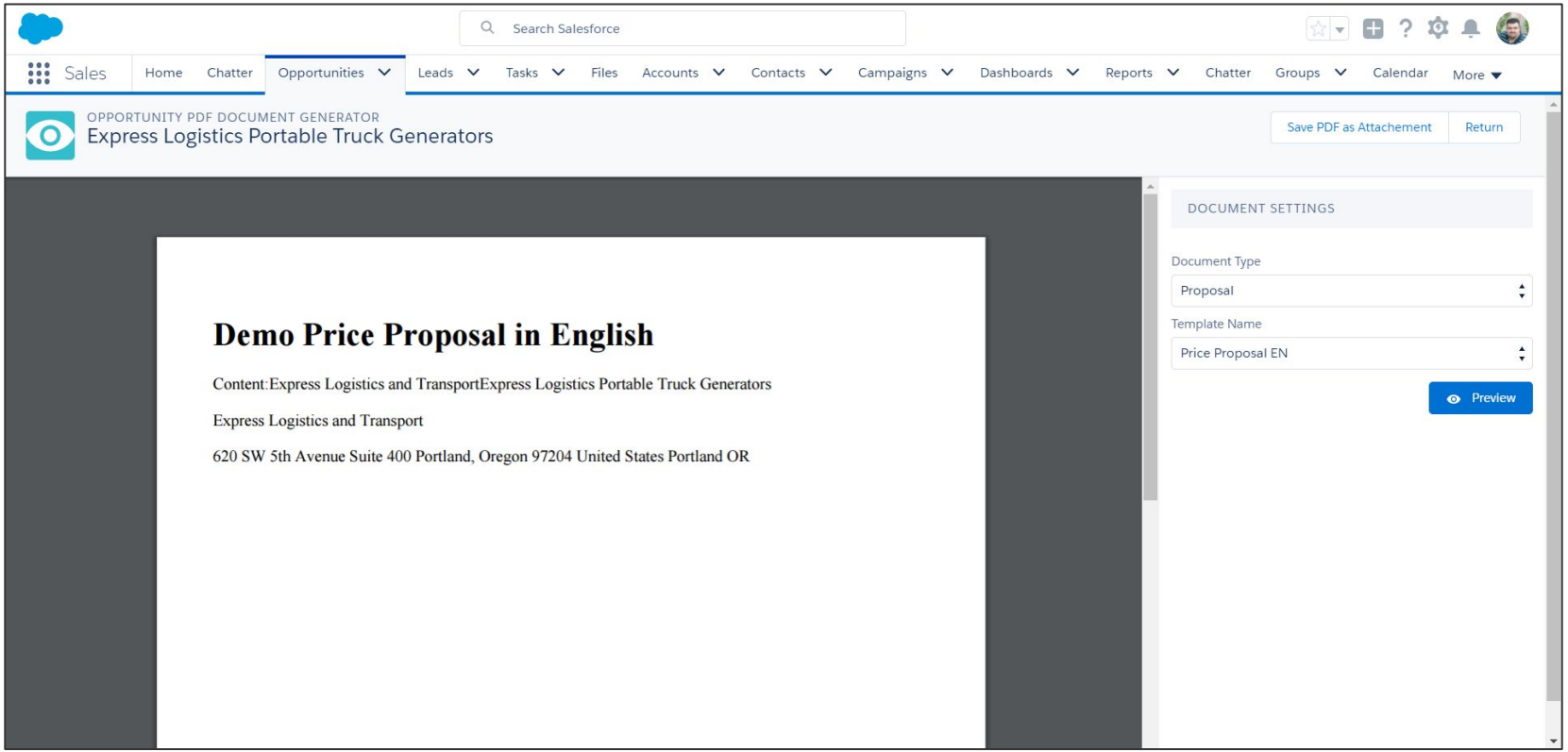
- Feel free to contribute :)

6.

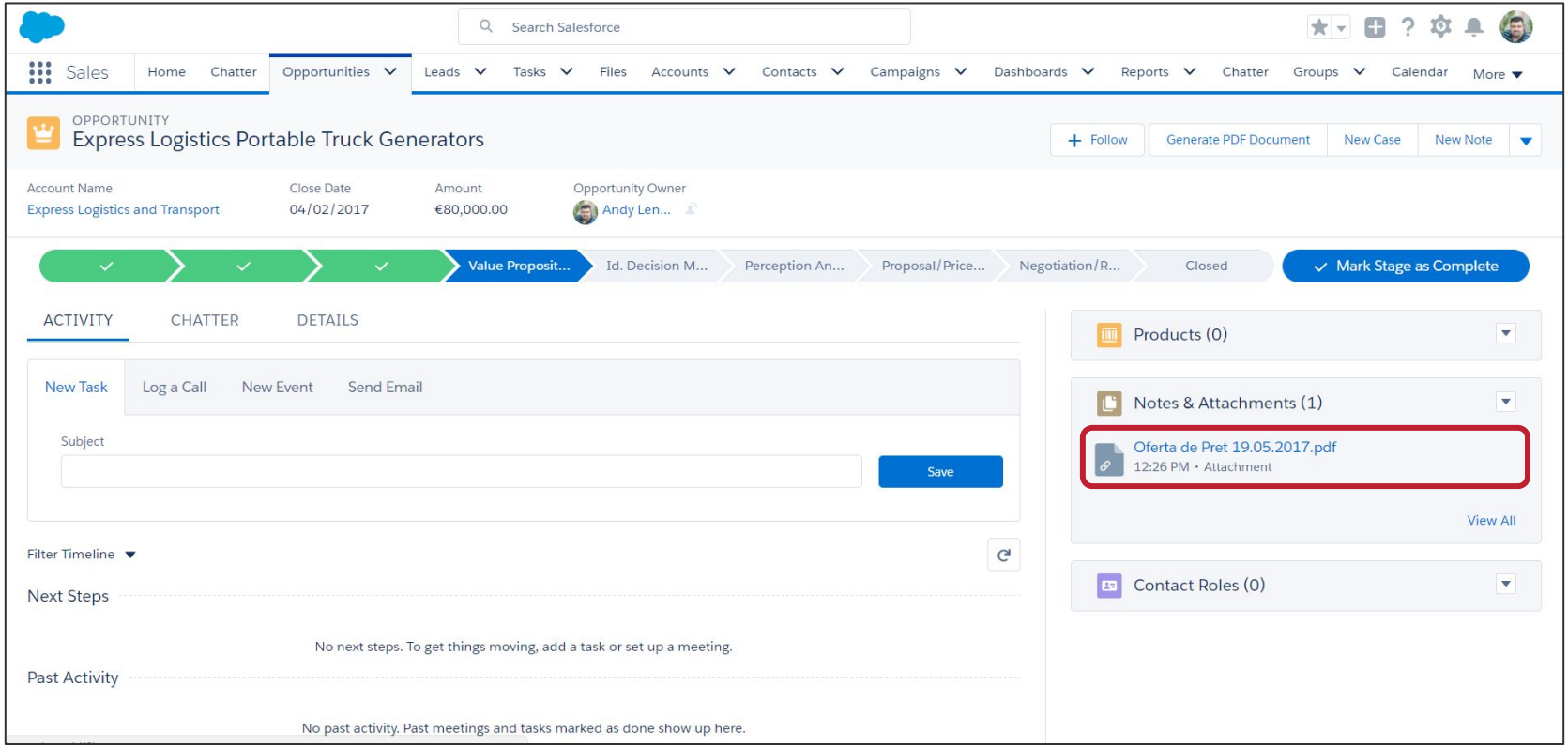
Generate your first PDF document

Evrika!

Generate PDF



Save your PDF as Attachment



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7.

Bonus

Integrate your generated PDFs with DocuSign!

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Thanks!

Any questions?

You can find me at:

andy.lengyel@gmail.com
https://www.linkedin.com/in/andy-lengyel-5672a384/
https://www.facebook.com/androniu.lengyel