

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>



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

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.

2.

Modeling the Solution

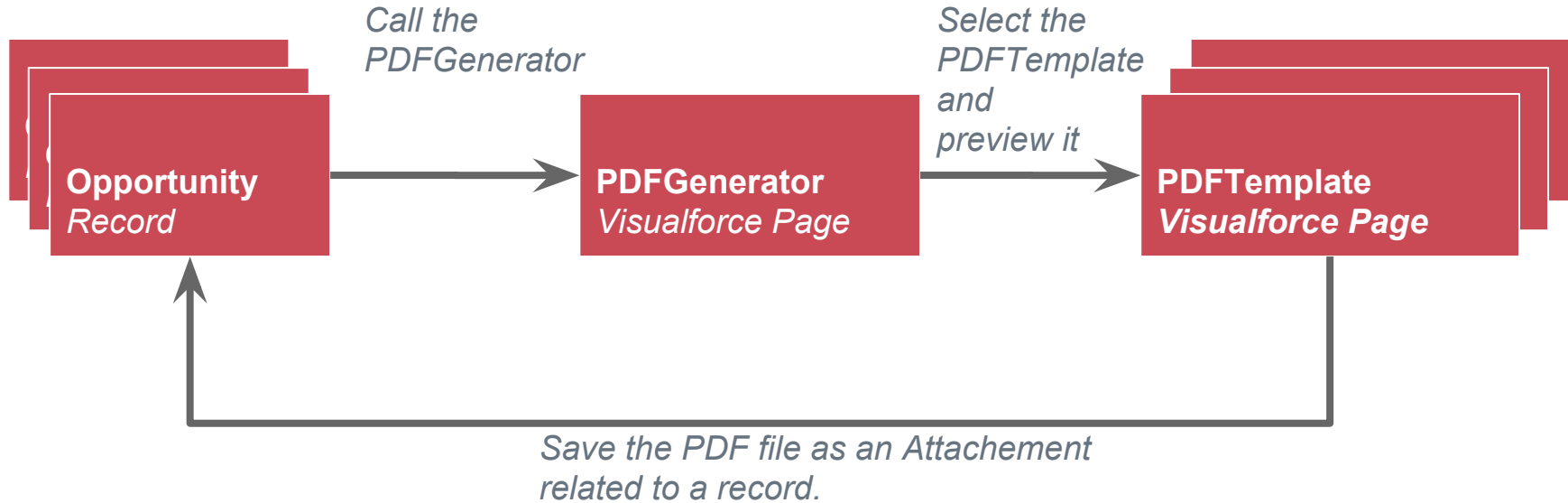
“Modeling isn’t a profession, it’s a lifestyle.”

Custom Object

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

PDF Template	
Active	Checkbox
Created By	Lookup(User)
DocumentType	Picklist
File Name	Text(100)
Last Modified By	Lookup(User)
Object Type	Picklist
Owner	Lookup(User+1)
PDF Template Name	Text(80)
Template Page	Text(100)

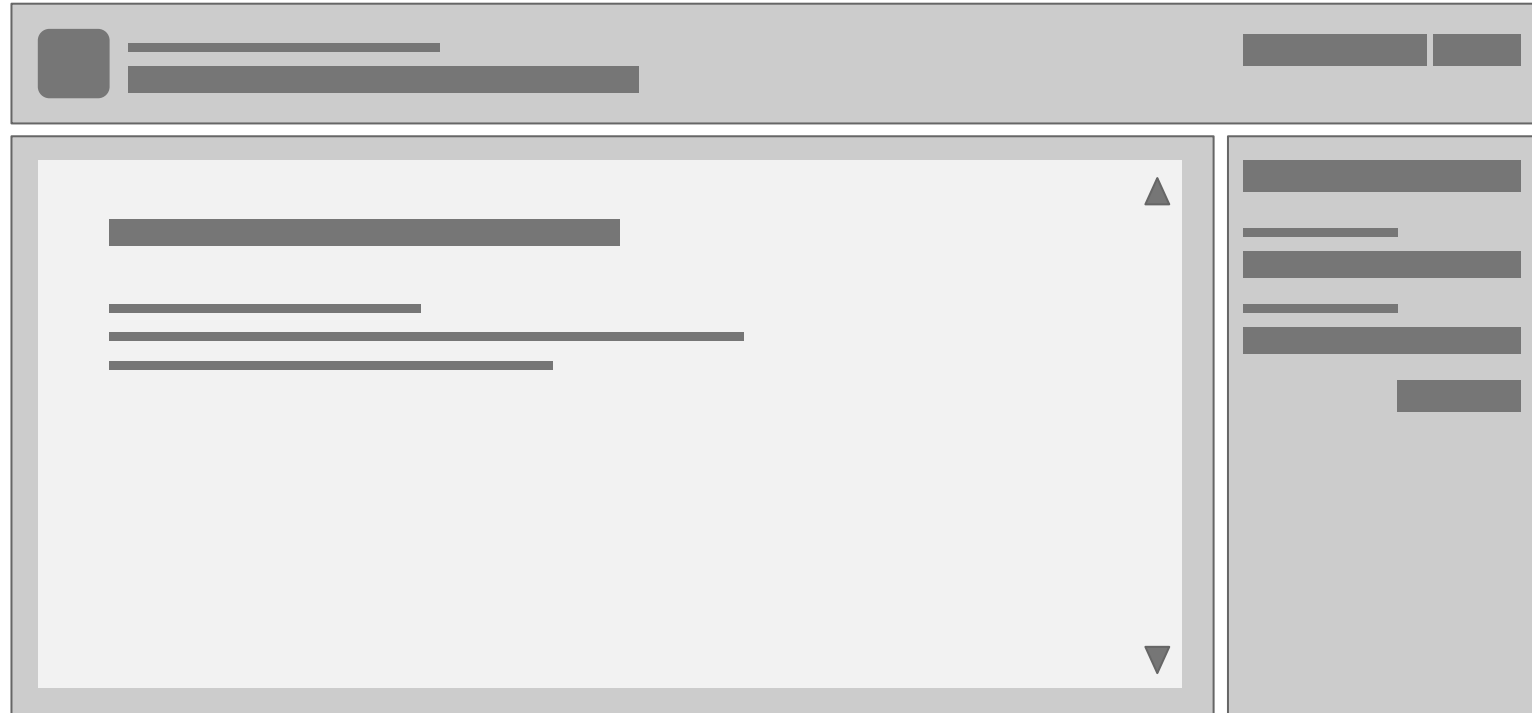
The Flow



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



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 then 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') }"/>
```

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

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

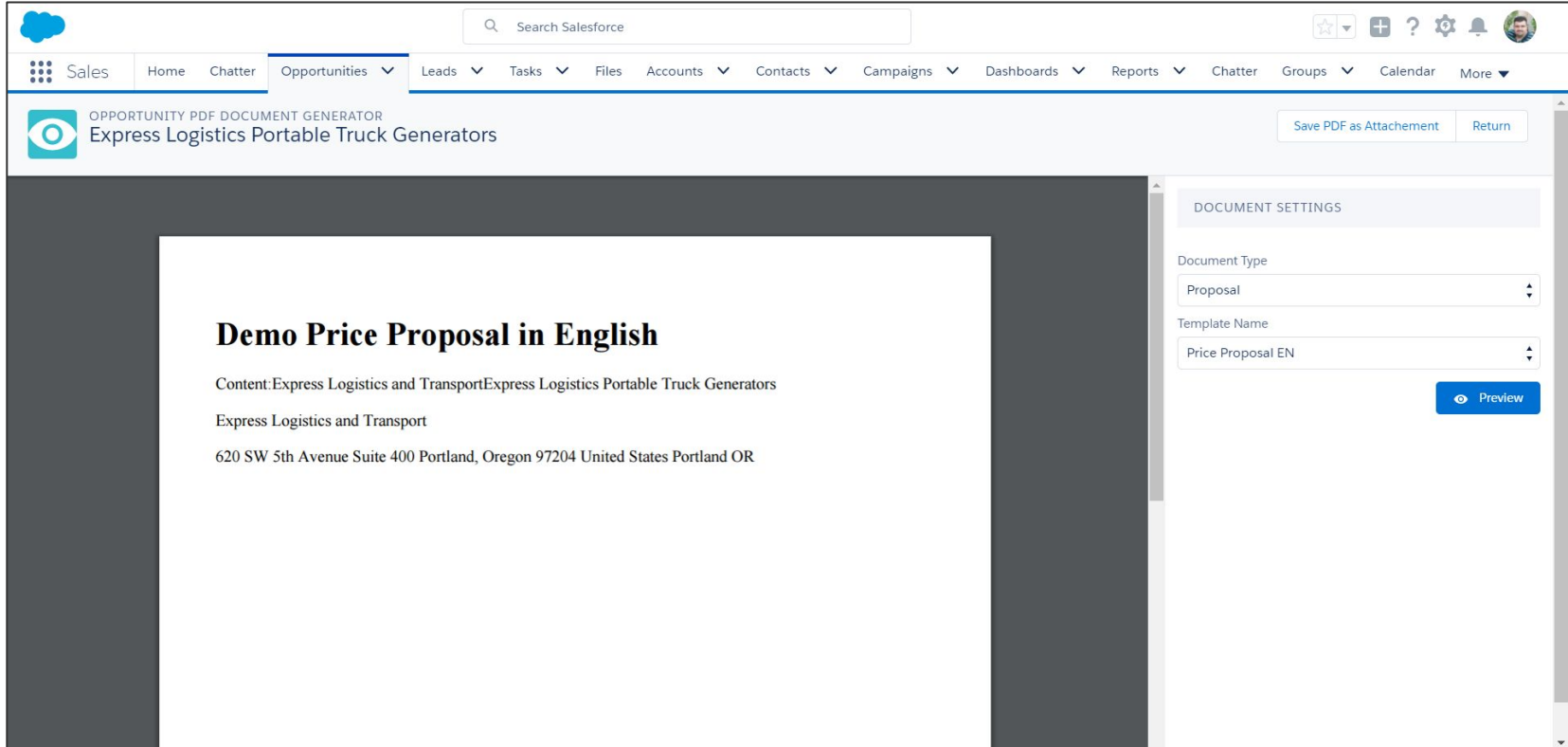
- Feel free to contribute :)

6.

Generate your first PDF document

Evrika!

Generate PDF



The screenshot shows the Salesforce Opportunity PDF Document Generator interface. The top navigation bar includes the Salesforce logo, a search bar, and various tabs like Sales, Home, Chatter, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, and More. The main content area displays the document title "Express Logistics Portable Truck Generators" and the document type "Proposal". The document content is a "Demo Price Proposal in English" for "Express Logistics and Transport" located at "620 SW 5th Avenue Suite 400 Portland, Oregon 97204 United States Portland OR". The right sidebar shows "DOCUMENT SETTINGS" with fields for "Document Type" (Proposal) and "Template Name" (Price Proposal EN), along with a "Preview" button.

OPPORTUNITY PDF DOCUMENT GENERATOR
Express Logistics Portable Truck Generators

Demo Price Proposal in English

Content: Express Logistics and Transport Express Logistics Portable Truck Generators

Express Logistics and Transport

620 SW 5th Avenue Suite 400 Portland, Oregon 97204 United States Portland OR

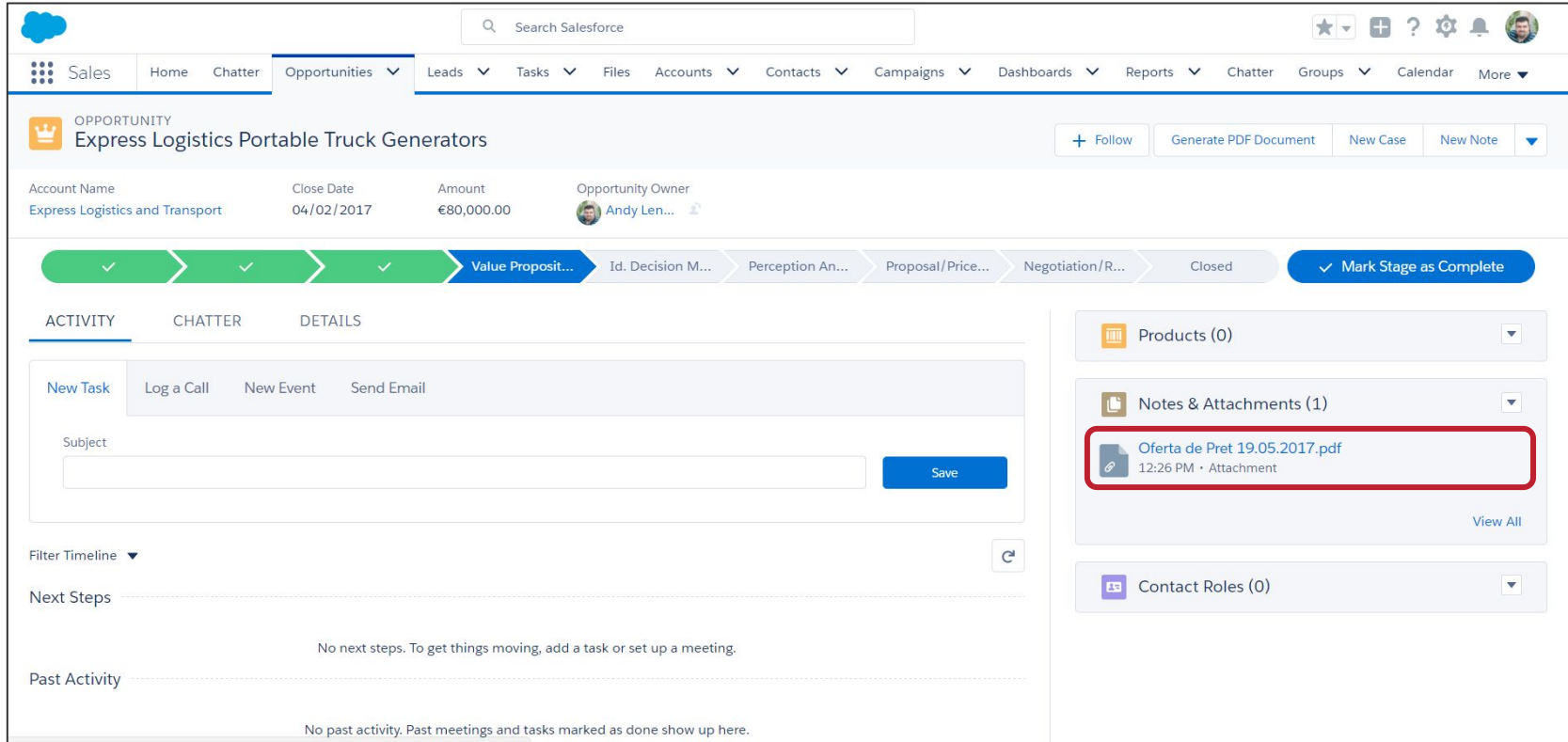
DOCUMENT SETTINGS

Document Type
Proposal

Template Name
Price Proposal EN

[Preview](#)

Save your PDF as Attachment



The screenshot shows a Salesforce Opportunity record for "Express Logistics Portable Truck Generators". The record is owned by Andy Len... and has a close date of 04/02/2017 with an amount of €80,000.00. The opportunity is currently in the "Value Proposition" stage of a sales process that includes stages like "Id. Decision M...", "Perception An...", "Proposal/Price...", "Negotiation/R...", and "Closed".

On the right sidebar, under "Notes & Attachments (1)", there is a red box highlighting an attachment named "Oferta de Pret 19.05.2017.pdf" with a timestamp of 12:26 PM. Below this, there are sections for "Products (0)" and "Contact Roles (0)".

On the left, the "ACTIVITY" tab is active, showing options to "New Task", "Log a Call", "New Event", and "Send Email". There is a "Subject" input field and a "Save" button. Below this, there are sections for "Next Steps" and "Past Activity", both currently empty with instructions to add tasks or meetings.

7.

Bonus

Integrate your generated PDFs with DocuSign!

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>