

# Configuration in Disguise

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# What is Configuration in Disguise?

- Configuration that has a meaningful impact on development.
- Can view development and not know configuration is a driving factor.
- Development: code or declarative



# Why Configuration?

	Cost and Time	Maintenance	Complexity and Scalability
Code	Resource allocation and time to complete.	Who maintains code after initial development?	More complex and to scale potentially need more code.
Clicks	Declarative is fast with platform tools available.	No code or test automation to maintain. Regular releases.	Can build complex things with clicks. Limitations are design focused not execution focus.



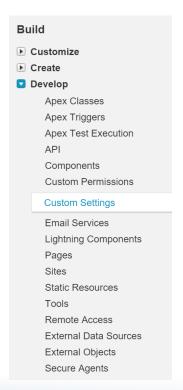
# What kind of Configuration?

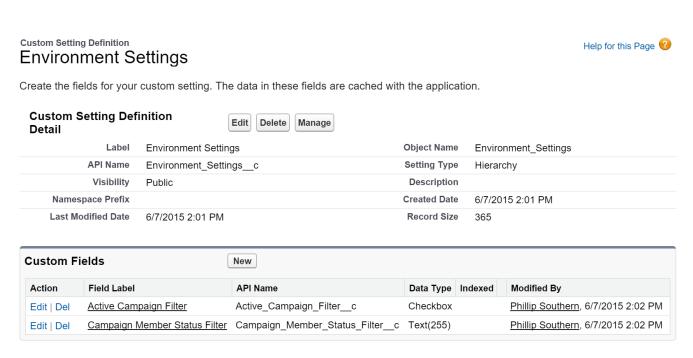
- Custom Settings
- Custom Labels
- Field Sets



## **Custom Settings**

Similar to custom objects, custom sets of data.







# Hierarchy and List Custom Settings

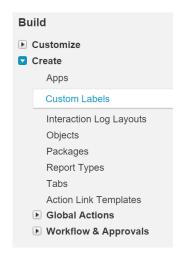
Which should I use?

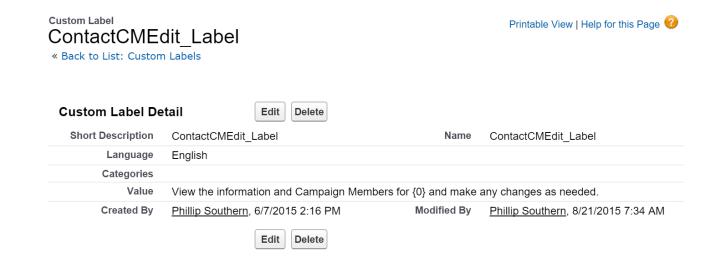
	Type	Apex Use?	Formula Use?
Hierarchy	Built-in hierarchical logic let's you personalize for profile or user.	Yes	Yes {!\$Setup.CustomSettingNamec.CustomFieldNamec}
List	Reusable set of static data. Available Org-wide.	Yes	No



#### **Custom Labels**

Custom text values, accessed in Apex, VF, and Lightning components.

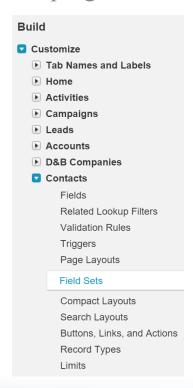


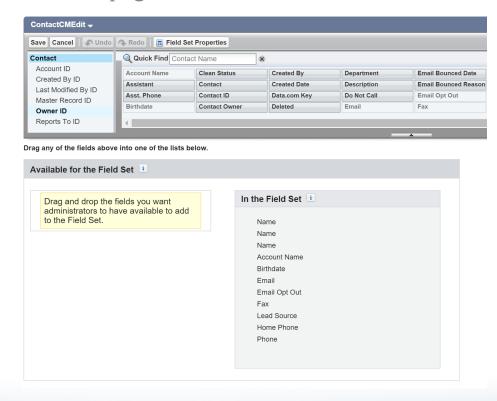




#### Field Sets

Grouping of fields, can be added to VF pages.







# Why is this important?

Why should we care?

Admin	Developer	Both
Configuration is accessible and easy.  Developers may not know or are	developers.	Change Control
new to platform.  Opportunity for engagement in	Less revisions and management.  Easier code management.	
process.		



#### Use Cases

- Id Monitoring
- Picklist Value Monitoring
- Turn Functionality On/Off
- Sections of Fields on Visualforce Pages
- Welcome Messaging



#### Demo

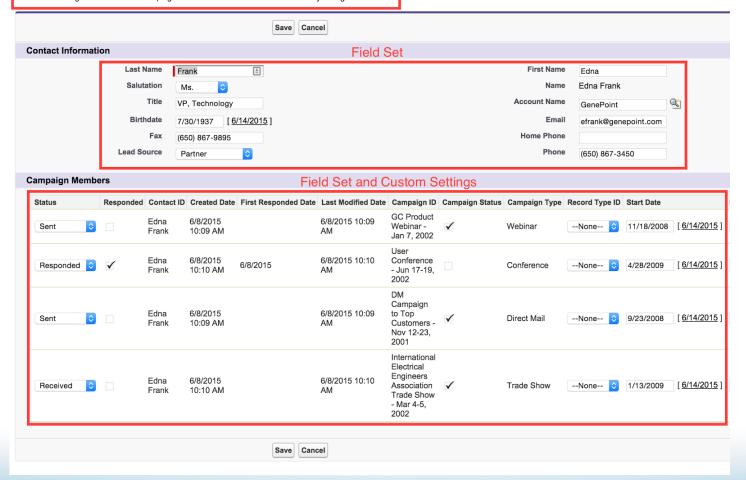
Use Case: Visualforce page needs to show Contact and Campaign Members to edit.

- Edit a custom label
- Edit a field set
- Edit a custom setting





View the following information and Campaign Members for Edna Frank and make any changes as needed.





## **Demo Items**

Custom Page with Visualforce and Apex. Custom Button on Standard Page

Configuration	Purpose
Custom Label	Welcome message with instructions on Visualforce page.
Custom Setting – Hierarchy	Single filtering value for Active Campaign and Campaign Member Status.
Custom Setting – List	Multiple filtering values for Campaign type.
Field Sets	Display fields for Contact and Campaign Members on Visual force page.



#### **Custom Label**



## **Custom Setting**

```
//**Hiearchy Custom Setting
Environment_Settings__c es = Environment_Settings__c.getinstance();
if(es.Campaign_Member_Status_Filter__c != null)
{
    cmquery += ' AND Status = \'' + es.Campaign_Member_Status_Filter__c + '\'';
}
```



#### Field Set



# **Advanced Options**

- Calling Flow from code.
- Calling code from Process Builder and Flow.



# **Demo Calling Flow**

Use Case: Visualforce page to let user report Account Health Status for an Account. On save of information create a case.



## Code calling Flow

```
Map<String, Object> vars = new Map<String, Object>();
vars.put('accountId',a.Id);
vars.put('comments',comments);
vars.put('status', healthSelected);

Flow.Interview.Flow_Create_Followup followupFlow = new Flow.Interview.Flow_Create_Followup(vars);
followupFlow.start();

String followupId = (String) followupFlow.getVariableValue('followupObjectId');
return new PageReference('/' + followupId);
```



## Summary

- Configuration can drive Development.
- Why Configuration? Cost and Time, Maintenance, Complexity and Scalability.

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Github repo: <a href="http://bit.ly/configurationInDisguise">http://bit.ly/configurationInDisguise</a>



#### References

Custom Settings: <a href="https://help.salesforce.com/apex/HTViewHelpDoc?id=cs\_about.htm">https://help.salesforce.com/apex/HTViewHelpDoc?id=cs\_about.htm</a>

Custom Labels: <a href="https://help.salesforce.com/HTViewHelpDoc?id=cl\_about.htm%language=en\_US">https://help.salesforce.com/HTViewHelpDoc?id=cl\_about.htm%language=en\_US</a>

Field Sets: <a href="https://help.salesforce.com/HTViewHelpDoc?id=fields\_about\_field\_sets.htm">https://help.salesforce.com/HTViewHelpDoc?id=fields\_about\_field\_sets.htm</a>

Clicks vs Code: <a href="https://developer.salesforce.com/blogs/engineering/2014/12/forcedotcom-declarative-development.html">https://developer.salesforce.com/blogs/engineering/2014/12/forcedotcom-declarative-development.html</a>



