# **Force.com Applications**

## **Building Data Model**

- 1. Fields
- 2. Standard Fields
  - 1. Created when object are generated
    - 1. ID
    - 2. Name Text OR Auto Number
    - 3. Owner
    - 4. Other Created by, Modified By, Created date, last Modified date
    - 5. Data Types
      - 1. Numeric
        - 1. Number
        - 2. Currency
        - 3. Percent
  - 2. Calendar
    - 1. Date
    - 2. Date Time
  - 3. Limited Option
    - 1. Check Box
    - 2. Pick list
    - 3. Multi-select Pick List
  - 4. Formatted Text
    - 1. Email
    - 2. Phone
    - 3. URL
  - 5. Text
    - 1. Text
    - 2. Text Area (255)
    - 3. Long Text Area (32768)
    - 4. Rich Text Area (Formatted Text, Links, Images)
    - 5. Encrypted
  - 6. Calculation
    - 1. Auto Number
    - 2. Formula
    - 3. Roll Up Summary
    - 4. Custom Field Properties

      - 2. Label
      - 3. Universally Required
      - 4. Unique
      - 5. External ID Custom Index added, Improves SOQL & Report Performance, Can have 3 External ID fields per object
      - 6. Default Value

- 7. Help Text
- 8. Field Dependencies
  - 1. Standard Pick list can be controlling not dependent
  - 2. Max values in controlling is 300 (so also if a field is both controlling and dependent)
  - 3. Before defining at least 1 value is required
  - 4. Custom multi select pick list cannot be controlling field
  - 5. Encrypted fields
    - 1. Provisioned feature
    - 2. View encrypted data permission
    - 3. Can edit even if not having View encrypted data permission
    - 4. Cannot be unique, external id or have default value
- 3. Object relationships
- 4. Lookup
  - 1. Child detail optional
  - 2. Each object can have as many as 25
  - 3. Creates a related list on the parent object
- 5. Master Detail
  - 1. Required child
  - 2. Delete parent child deleted
  - 3. Master in one cannot be detail in another not possible to create multiple level
  - 4. Can create between two custom or one custom and one standard (standard always master)
  - 5. Cannot create master detail to users or leads
  - 6. Detail side objects cannot have sharing rules, manual sharing or queues (no owner fields)
  - 7. Maximum 2 relationships per object
  - 8. Can perform cross object fields updates and roll up summary fields
  - 9. Can span multiple levels depending on Master object is standard or custom??

#### 10. Special Relationships

- 1. Self relationships
  - 1. Lookup to self object
  - 2. Hierarchy
  - 3. May to many
    - 1. Two many to one relationships with same object on detail side
    - 2. Junction (Intersection object) object
    - 3. Deleted when one of the master is deleted (Kept in trash). If both master deleted it is deleted permanently.

#### 11. Lookup Filter

- 1. Limit search results
- 2. Compare fields to other fields and standard value

3. Can be required or optional

## **Building User Interface**

- 1. Custom Application
  - 1. Logo and Landing Tab
- 2. Custom tab
  - 1. Custom Object tab
  - 2. Web Tab
  - 3. VF Tab

## **Business Logic**

- 1. Formula fields
- 2. Cross object formula
  - 1. Cannot reference cross object formula in roll up summary fields
  - 2. Cannot reference merge fields for objects related to activities
  - 3. Cannot reference record owner merge fields
  - 4. Limit for cross object formula fields is 10 unique relationships per object across all formulas and rules
- 3. Roll up summary fields
  - 1. Sum, Minimum, Maximum, Record Count
  - 2. Can create for all custom MD
  - 3. Some standard relationships also including Account Oppty and Oppty Product

Migrating configuration changes

- 1. Configuration stored as meta data
  - 1. Tools to move meta data
    - 1. Change sets
    - 2. Force.com ide
    - 3. Migration Tool
- 2. Change sets
  - 1. Point and click web interface to move metadata only between "related" orgs
  - 2. Requirements
    - 1. Apex code 75% code coverage unit testing
    - 2. Incompatibilities between versions not migrated (can upload compatible part)
    - 3. Manually migrate changes that cannot be included
    - 4. Renaming or deleting cannot be specified
    - 5. Need change set profile permission
    - 6. Deployed entirely or not at all (if one component fails all fails)
    - 7. Cannot modify once uploaded by can be cloned

# **Analytics as a Service**

## Reports

- 1. Custom Reports Basics
  - 1. Reports do not save data only the report logic
  - 2. Data Displayed based on access levels
  - 3. Reports are real time
  - 4. Reports access determined by folder
- 2. Report Builder
  - 1. Panes: Field, Filter and preview Panes
  - 2. Formats
    - 1. Tabular
    - 2. Summary Sorting, sub Total
    - 3. Matrix Grid, Compare related totals
    - 4. Scheduled reports run in the time zone of the user scheduling report
    - 5. To email a report it must be in public folder

### Dashboards

- 1. Dashboard Component based on report or chart
- 2. Based on data when dashboard was run
- 3. Dashboard components (20 max)
  - 1. Chart
  - 2. Table 4 columns, summary fields
  - 3. Gauge
  - 4. Metric Single no
  - 5. VF page
- 4. Chart Types
  - 1. Verticle column
  - 2. Horizontal Bar
  - 3. Line
  - 4. Donut
  - 5. Funnel
  - 6. Pie
  - 7. Scatter
- 5. Access
  - 1. Folder & Running user
  - 2. Each dashboard can have 3 filters
    - 1. Date/time, currency, picklist, lookup and text
    - 2. Fields that are common to all components
    - 3. Can not be added where you have VF components, used with bucket fields
    - 4. Dashboard Filter based on 1 field (10 options)

## **Custom report Types (CRT)**

- 1. Standard & Custom report Types
  - 1. Standard Created when an object is created or relationship is created
  - 2. CRT
- 2. Creating CRT
  - 1. Define Primary Object
  - 2. Optional Define report record set (related records / up to 4 objects) with or without
  - 3. Optional Add fields
  - 4. With (only when there is child) & With or Without (irrespective of child record)

## **Analytic Snapshots**

- 1. Steps
  - 1. Create report
  - 2. Create object
  - 3. Create snapshot

# **Data Management**

### **Data Management Overview**

- 1. Uses Web Services API to access application
- 2. Data Management operations
  - 1. Export
  - 2. Insert
  - 3. Update
  - 4. Upsert
  - 5. Delete
  - 6. Record Id
    - 1. Two Format 15 Digit Case Sensitive and 18 Digit Case Insensitive (first three char object)
- i. Reports 15 Digits
- ii. API 18 Digits
- iii. For Updates APIs expect 18 Digit
- iv. Can convert 15 to 18
  - 1. Ways to access record ID URL, Reports, API, Formula Fields
  - 2. Help establish Object Relationships

- 3. Data Loaded in sequence depending on dependencies
- 4. "Inserting System Fields" like created date can be set when importing if this feature is enabled (only during initial import of data). Cannot be updated.
  - 1. Inserting System Fields is only for
- i. Account
- ii. Oppty
- iii. Case
- iv. Lead
- v. Task
- vi. Event
- vii. All custom objects
  - 1. Available only through API and backward compatible with SOAP based APIs

### **External Ids**

- 1. UPSERT An API function that provides INSERT & UPDATE in single call
- 2. External id
  - 1. Each object can have 3
  - 2. Help improve report and SOQL performance
  - 3. Upsert and External Ids are used for migration and data integration
  - 4. Can help auditioning the flow of information
  - 5. When UPDERTING If the extern ID matches with no record a new record is created, if it matches with 1 record it is updated and if multiple records then error is thrown

## **Data Management Tools**

- 1. Import Wizards
  - 1. 50000 records
  - 2. Accounts, Contacts, Leads, Solutions, Custom Objects
  - 3. Prevent Duplication (Using Account Name & Site OR Account ID, Contact Name, Contact Email OR Contact ID, Custom Object Name OR ID)
  - 4. API Based Tools
    - 1. Data Loader
    - 2. Can load more than 50000 records
    - 3. Schedule data loads every night
    - 4. Export for backup

- 5. Delete multiple objects
- 6. Data Loader
  - 1. Supports CSV files & External Database through JDBC
  - 2. Can run from command line
  - 3. SOQL Salesforce Object Query Language
  - 4. Data Loader Operation
- i. Extract uses SOQL
- ii. Insert -
- iii. Update Matches records based on SF ID
- iv. Upsert Matches records based on SF ID OR External ID
- v. Delete Matches records based on SF ID
  - 1. Can be used only for DE, EE or UE
  - 2. Selecting Data Management Tool
    - 1. Dedup data Import Wizard
    - 2. Schedule Data Load Data Loader
    - 3. Load two related objects at once Import Wizard
    - 4. Load < 50000 records Import Wizard
    - 5. Export Data for backup Data Loader
    - 6. Load data for object not supported by wizard data Loader
    - 7. Upsert or Upsert with relationships Data loader

#### **Managing Data**

- 1. Running Data Loader from Command Line
  - 1. java jar DataLoader.jar
  - 2. com.salesforce.dataloader.process.PricessRunner with DataLoader.jar in classpath
  - 3. Options

#### i. –Dsalesforc.config.dir=CONFIG\_DIRECTORY.

- 1. Data loader runs operation file or map in the configuration file
- 2. If no directory is speceified takes the current directory
- 3. Default directory
- i. C:Program FilesSalesforce.comData Loader Versionconfig
  - 1. Batch process configuration file process-conf.xml is at samplesconf directory
  - 2. If you use process-conf.xml setting process.name to the name of process specifies process to run otherwise config.properties is used for parameter settings
  - 3. Data Loader Encryption

- 1. Encryption Utility RunBinencrypt.bat
- 2. Command Line Prompts
- i. Generate a key
- ii. Encrypt text
- iii. Verify Encrypted Text
  - 1. Mass Transfer Records
    - 1. To Transfer users need required user permission and read sharing access to record
    - 2. Can be used to transfer Accounts, Leads and Custom Objects

# **Designing Applications for Multiple Users**

## **Design Considerations**

- 1. Design Considerations
  - 1. Users What they see and what they do
  - 2. Data Access path Data that can be accessed by whom and restrictions
  - 3. Analyzing Business requirements
    - 1. Identify Actors and Data
    - 2. Identify How much each actor will see
    - 3. Specify access levels

## **Managing User Experience**

- 1. Licenses
  - 1. User License
- i. Salesforce Full access to standard CRM, Force.com Appexchange apps
- ii. Salesforce.com Platform Only custom apps, Force.com Appexchange apps
  - 1. Feature License
- i. Marketing
- ii. Offline
  - 1. Profiles
    - 1. Define user's permission to perform different functions
    - 2. Profiles are associated with license type
    - 3. Work in conjunction with role hierarchy and sharing model

- 4. Profiles control permissions, access to data and user interface
- i. Permissions Admin & General, Standard Object & Custom Object
- ii. Access to data Field Level security
- iii. User Interface Page Layout, Apps, Tabs, Record Types
  - 1. Admin Permissions View All data, Modify All data, Customize Application, API Only User (can not <u>login</u> to sfc.com, Password never expires)
  - 2. Standard (can not be created, deleted or customized) & Custom profiles (to modify the standard profiles can be deleted or customized)
  - 3. Profile Permissions
  - 4. Permission Set
    - 1. Group of permissions in addition to their profile
    - 2. A user can have 1 profile and multiple permission sets
    - 3. 1 org can have up to 1000 permission sets
    - 4. Can only be used to give permission but not to deny
    - 5. Profiles v/s Permission sets
      - 1. Permissions sets Applications, objects, tabs, fields, apex classes, service provider and VF pages
      - 2. Profiles App Picker, Tab defaults, record Type, page Layout, Login hours, Desktop client access, category group access
      - 3. Field Level Security
      - 4. User Interface & profiles
        - 1. Record Type View different details on page
        - 2. Page Layouts

#### **Controlling Record Access**

- 1. Considerations
  - 1. Ownership of records can be transferred to any user who has at least 'read' permission on object
  - 2. Child records in MD relationships inherit the properties of parent
  - 3. Users or Queue can be owners
  - 4. Levels of Record access
    - 1. Read only
    - 2. Read Write
- i. OWD
- ii. Role hierarchy
- iii. Sharing rules
- iv. Manual sharing

- v. Apex sharing
- vi. "view all data"
  - 1. Full Access
- i. Record Owner
- ii. Above in Role Hierarchy
- iii. "Modify all data"
  - 1. OWD
    - 1. Baseline level of access to data that we do not own
    - 2. Restrict access to data
    - 3. Three levels
- i. Public Read Write
- ii. Public Read Only
- iii. Private
  - 1. Roles & Hierarchy
    - 1. Record access through Role hierarchy
    - 2. Rolls up for all standard objects if the person above has access to object by profile
    - 3. Custom objects can be defined whether access can be granted or not (Use Grant Access using hierarchy in OWD)
    - 4. Public groups
      - 1. Default Public Group All Internal users
      - 2. Made up of combination of
- i. Users
- ii. Roles
- iii. Roles & Sub
- iv. Other Public groups
  - 1. Use public groups to
- i. Reduce no of sharing rules
- ii. Folder access

- 1. Sharing rules
- 2. Manual sharing
- 3. Apex sharing Reason
- i. Developers define why a user has access to record
- ii. Sharing reason does not creates sharing rule
- iii. Deleting a reason may sharing rule that uses that reason
- iv. Requires 'Modify all data'
- v. Used programmatically and not through app
- vi. Sharing button will display reason
  - 1. Access to Record Review is in following order
    - 1. Permissions (like View all data)
    - 2. Record Ownership
    - 3. OWD
    - 4. Role hierarchy
    - 5. Sharing (rules or manual sharing)

Designing Data Access Security

# **Implementing business processes**

#### Automating Business Processes with workflow

- Workflow rule automate business process
   Process
- i. Select object
- ii. Specify criteria
  - 1. Only when Record is created
  - 2. Record is created or Updated and first meets criteria
  - 3. Every single time created or updates
- iii. Rule criteria
  - 1. Workflow actions
- i. Immediate

- ii. Time dependent
  - 1. Cannot be set for every time record is created or updated
  - 2. Can monitor in Time dependent workflow q (can remove actions)
  - 3. If a record has action pending in TDWQ and record no longer meets criteria or timing changes the action will be updated.
  - 4. If no longer meets action is removed

#### iii. Action types

- 1. Email
- 2. Update field
- 3. Send outbound message
- 4. Assign a task

#### **Auditing processes**

- 1. Setup audit trail track changes made to the setup
  - 1. Date, name of user and change
  - 2. 20 changes on screen and 180 days changes by download
  - 3. Field History Tracking
    - 1. History Related list
    - 2. Tracked for Accounts, Cases, Contacts, Contracts, Leads, opportunities, Solutions and Custom Objects
    - 3. Old value, new value, date time and user
    - 4. Long text area and multi-select pick lists are not tracked
    - 5. 20 fields per object
    - 6. Auditing tools
      - 1. Debug logs Activities performed by end user or code
      - 2. Setup audit trail config changes by admin
      - 3. Field history data value changes

#### **Approval processes**

- 1. Steps
  - 1. Process definition which records enter process, settings for whole process
  - 2. Initial submission action locking, assigning task, email, update field, ob message
  - 3. Step definition which records enter step (all or some), multiple step
- i. Decision criteria
- ii. Assignment
  - 1. Final rejection action unlock, task, email, update fields, ob message

- 2. Final approval action unlock, task, email, update fields, ob message
- 3. Recall action unlock, task, email, update fields, ob message
- 4. Process visualise
  - 1. Read only visual
  - 2. Workflow v/s Approval
    - 1. Wf triggerd when record is saved approval manual
    - 2. One set of criteria and actions have multiple steps, entry and step criteria and step actions + more actions
    - 3. Can be modified or deleted some attributes can not be modified without deactivation.
    - 4. Skipping steps
      - 1. Criteria to Skip Step in an approval process
      - 2. Can be a filter criteria or formula
      - 3. Options

i. Go to next step (only if there is next step and if next step is deleted SF will automatically change to reject record)

- ii. Approve
- iii. Reject
  - 1. Selecting Go to next step in the first step and record does not meets criteria record is rejected
  - 2. Parallel approval process
    - 1. Can send approval to multiple users
    - 2. Up to 25 users
    - 3. Unanimous / based on 1<sup>st</sup> response
    - 4. Outbound messages
      - 1. Designate end point
      - 2. Secure configurable API message in xml format
      - 3. Dynamic approval process
        - 1. Route records based on approval matrices
        - 2. Approval request to users listed in record
        - 3. Creating
- i. Create lookup fields on object approved
- ii. Custom object as approving matrix
- iii. Populate approval matrix
- iv. Create apex code to fill lookup fields from approval matrix
- v. Approval process to utilize lookup fields

- 1. Order of automated process
  - 1. Validation rule
  - 2. Assignment rule
  - 3. Auto response rule
  - 4. Workflow rule
  - 5. Escalation rule
  - 6. Visual workflow (flows)
    - 1. Required Manage Force.com Flow
    - 2. Cloud Flow Designer

#### **Preserving Data Quality**

- 1. Validation Rules data meets the standards (formula or expressions)
  - 1. Run on server
  - 2. UI, API, Import wizard
  - 3. You write Error condition formula and Error Message
  - 4. Conditionally required fields
  - 5. Data Quality
    - 1. REGEX compares text field to Regular expression (pattern used to describe a set of strings according to syntax rules)
    - 2. Data consistency
      - 1. VLOOKUP validation rule stored in another object
      - 2. Prevent data loss
        - 1. Use in conjunction with Rollup summary field
        - 2. Parent sums no of child objects

# **Visualforce Pages**

### **Visualforce Introduction**

- 1. Two types of UIs
  - 1. Page Builder
  - 2. Visualforce
- i. Full control over UI
  - 1. In line editor available on "Development mode"
    - 1. Automated completion, syntax highlighting, documentation
    - 2. Create a page /apex/pagename
    - 3. Visualforce Pages defined using mark-up language
      - 1. Can include
- i. Visualforce tags

- ii. Force.com expressions
- iii. HTML / CSS
- iv. Javascript
- v. Flash
  - 1. Can Ajax Toolkit to access web services API to connect to SF data
  - 2. Limited to 15 MB
  - 3. Visualforce component tags generated HTML tags behind the scene to create the page
  - 4. Benefits
    - 1. Understand SF metadata
    - 2. Coupled with Force.com same performace
    - 3. Auto upgrade
    - 4. Separate view from navigation control and data model
    - 5. Confirms to MVC
    - 6. MVC
      - 1. Model (data Structure)
      - 2. View (data display)
      - 3. Controller (rules)
      - 4. Elements of VF
        - 1. Pages
        - 2. Components referenced components for reuse
- i. Standard (prebuilt constructs) or Custom
- ii. Referenced using a Tag Library Model

iii. Dynamic Visualforce Components (Designed in Apex – Render pages based on variety of states)

- 1. Controllers
- i. Standard (new, edit, save)
  - 1. <apex:page standardContoller="Contact">
- ii. Custom
  - 1. Custom controller implemented in Apex
  - 2. <apex:page Contoller='XX'>

iii. **Controller Extensions** – OOB functionality while creating custom actions and data references

- 1. <apex:page Contoller='XX' extentions=MyClass,MyOtherClass">
- iv. Logic and data references
- v. A VF page reference one main controller
- vi. VF uses Expressions syntax to bind data to controllers
  - 1. All data in {!...} is evaluated as expression
  - 2. Versioning
    - 1. Previous versions are available
- 10. Namespaces
  - 1. Standard Tag <apex:page>
  - 2. Csutom Tag <c:customtag>
  - 3. Register Custom namespace <thirdpartynamespace:customtag>
- 11. Ways to add VF pages to Salesforce UI
  - 1. Link to URL
  - 2. Override standard buttons
  - 3. Overriding Tab overview pages
  - 4. Custom Tab
  - 5. Embedding on Page Layout
  - 6. Adding to dashboard
  - 7. Custom help to custom object

#### **Visualforce tags**

- 1. Tags
  - 1. Tags
  - 2. Text directly on page
  - 3. HTML tags and Comments <!---Comment ->
  - 4. Can use Javascript but not Javascript comments
  - 5. Hierarchial tags well formed means start and end tag or self contained tag
  - 6. Visualforce component tags similar to JSP tags
  - 7. Tag Binding
    - 1. Three types of Tag bindings
- i. Data Use Expression Syntax to pull data made available by page controller
  - 1. API naming syntax
    - 1. \_\_C
    - 2. Custom objects referenced through relationships dot notation and \_\_r
    - 3. Expression Syntax

- 1. Dynamic Object Data {!..}
- 2. Global Data {  $\{$  \$.. }
- 3. Local variables can be created

ii. Action – Use Expression Syntax to call action methods for functions coded in page controller

iii. Component – does not use expression syntax and uses component attribute vales to reference other component Ids

Basic Page Components

- Attributes and values

   Values Types
- i. Integer
- ii. String
- iii. Object {!Account}
- iv. Action Method {!Save}, {!Edit}, {!Delete}
- v. Boolean true, false
- vi. Iteration
  - 1. Layout Components
- i. <apex:page> single VF page
  - 1. standardController or controller
  - 2. title (String)
  - 3. tabStyle (String)
  - 4. action (Action Method)
  - 5. renderAs (string)
- ii. apex:variable
  - 1. value (Object)
  - 2. var (string)
  - 3. Static Resources Type of salesforce storage, like archive, images, CSS
- i. Referenced in code using \$Variable
- ii. Limit 5MB file overall 250 MB

- iii. Faster upload caching
- iv. Usage
  - 1. <apex:flash>
  - 2. <apex:image>
  - 3. <apex:stylesheet>
  - 4. <apex:stylesheet>

#### i. Stylesheers located in /sCSS/ directory with dStandard.css and allCustom.css

- 1. Pageblock tags
- i. <apex:pageBlock>
  - 1. Mode (string) detail / edit
  - 2. Title(string)
  - 3. tabStyle(string)
  - 4. facet tags
- ii. <apex:pageBlockButtons>
  - 1. location
- iii. <apex:pageBlockSection> section with columns
  - 1. Collapsible (Boolean)
  - 2. Columns (integer)
- iv. <apex:pageBlockSectionItem>
- v. <apex:SectionHeader>
  - 1. Title
  - 2. Subtitle
  - 3. Help
  - 4. Other UI Tags
- i. <apex:toolbar>
- ii. <apex:toolbarGroup>
- iii. <apex:tabPanel>
- iv. <apex:tab>

- v. <apex:panelBar>
- vi. <apex:panelGrid>
  - 1. Template Tags
- i. <apex:composition template:MyTemplate>
  - 1. Coarse Metadata Components 1. Apex:detail
- i. Subject
- ii. relatedList
- iii. relatedListHover
  - 1. apex:relatedList
- i. List
- ii. Subject
- iii. pageSize
  - 1. apex:ListView
- i. type
  - 1. apex:enhancedList
- i. customizable
- ii. type
- iii. rowsPerPage
- iv. width
  - 1. apex:repeat
- i. value
- ii. rows (integer) (0 all rows)
  - 1. Chater

- i. showChatter on apex:detail
- ii. <chatter:feed>
- iii. Chatter:follower
- iv. Chatter:follow
- v. Chatter:feedwith follow
  - 1. Massage tags
- i. Apex:message
- ii. Apex:pageMessage

Visualforce Form & Output Components

1. Form – enter data

1. a. Apex:form

- i. Accept
- ii. Title
- iii. Target
  - 1. **b.** Apex:inputfield
  - 2. c. Apex:inputwidget
- i. Widgets that do not correspond to data in SF (have limitations)
  - 1. Inputcheckbox
  - 2. inputHidden
  - 3. inputsecret
  - 4. inputtext
  - 5. inputtextarea

ii. use when you want to vary size of data, tab sequence, required inputs, bind to custom controllers and standard javascript events

- 1. selectWidgets (display of UI widgets in organized tables)
- i. selectcheckboxes
- ii. selectList

- iii. selectRadio
  - 1. apex:inputfile (attachments, documents, blobs)
- i. accept
- ii. contentType
- iii. filename
  - 1. apex:commandButton & apex:commandLink (used within form tags)
- i. action
- ii. value
  - 1. Output (display without allowing change in data and most have parallel form components)
    - 1. Apex:Outputlabel
- i. Vales
- ii. For
- iii. Tabindex
  - 1. Apex:outputField
- i. Value
  - 1. Apex:outputField
- i. Value
- ii. Title
- iii. coords
  - 1. Apex:outputLink
  - 2. Apex:OutputPanel
- i. Set of content grouped together (eg for partial page refreshes using ajax
  - 1. Apex:outputText
  - 2. g. Apex:pageBlockTable
  - 3. h. Apex:dataTable

- 4. i. apex:dataList
- 5. apex:column/
- 6. k. apex:flash
- i. src
- ii. height
- iii. width
- iv. flashVars
  - 1. apex:facet
- i. to override headers, footers and captions

### Visualforce components for modularity

- 1. Custom Components
  - 1. Can be standalone or accompanied by custom controller
  - 2. b. Apex:component
  - 3. Access using <c:component>
- i. Controller or extentions
- ii. Access (global (outside namespace) or public)
  - 1. Apex:attribute
  - 2. Apex:componentBody
  - 3. Page inclusion components
    - 1. <iframe>
    - 2. <include> include VF page in iframe
    - 3. Template Tags
      - 1. Reusable components for pages apex reference page and target VF page
      - 2. Three tags
- i. **<apex:define>** include dynamic content to be inserted
- ii. <apex:insert> insert named area defined by define tag
- iii. **<apex:composition>** container that references name on the target page
  - 1. Performance considerations
    - 1. One <apex:form> on one page
    - 2. Cache resources
    - 3. Page size < 15MB

- 4. Increase time interval to call apex from VF page to reduce delays caused by concurrent requests
- 5. Remove unnecessary fields esp the one that have MD relationship with other objects or are large text

## Javascript in VF pages

- 1. Action Binding & java Scripts
  - 1. Only actions that are shared across all objects are exposed through standard controllers
  - 2. For others Standard SF controllers are using javascript and expression syntax with **!URLFOR and \$Action**
  - 3. Javascript functions
    - 1. Can be included in header <script> or in a .js file
    - 2. **b.** Can be called any time after declatred
    - 3. Efficient way
    - 4. Ajax
      - 1. Used for partial page referesh
      - 2. Has been used to access Web services API within Javascript
      - 3. Due to data binding capabilities of VF the need of ajax for API is not required
      - 4. Ajax Tags
        - 1. actionStatus start stop status of ajax request
        - 2. **actionSupport** call second component when event happens to first component
        - 3. **actionPoller** similar to actionSupport but event is based on timer
        - 4. **actionFunction** support for invoking controller action from javascript code
        - 5. **actionRegion** demarcate the part of page to process
        - 6. partial Page update
          - 1. **reRender** attribute
- i. use along with <apex:outputPanel>
  - 1. Ajax
- i. Status update using actionStatus
- ii. StartText and StopText to display text ate the start and end of update
- iii. Display text or graphics after referesh <apex:facet name="stop">
  - 1. Ajax & Apex web service
    - 1. Create an apex class and expose it as a web service
    - 2. Call web service from a VF page

## **Advanced VF topics**

- 1. Force.com Sites
  - 1. Unauthenticated sites
  - 2. Use cases
- i. Web applications Event registration / reviews
- ii. Business supplications Recruiting Portal
- iii. Extend CRM Web to lead forms / Landing Pages
- iv. Corporate site website / intranet
  - 1. Mobile devices
    - 1. Salesforce mobile BB, iPhone, Widows
    - 2. iPhone better Javascript support than BB
    - 3. Create pages for mobile devices separation & redirection, lowest common denominator, conditional code
    - 4. Messaging:emailTemplate
      - 1. emailHeader
      - 2. htmlEmailBody
      - 3. plainTextEmailBody
      - 4. attachment
      - 5. Chatter Date Model
        - 1. Core object FeedItem
        - 2. Chatter Tags
          - 1. showChatter
          - 2. <chatter:feed>