

Before You Begin


Did you sign up for a special OmniStudio Developer Edition org already? You'll need one to do the steps in this guide. Here's how to request one if this is your first time completing an OmniStudio module:

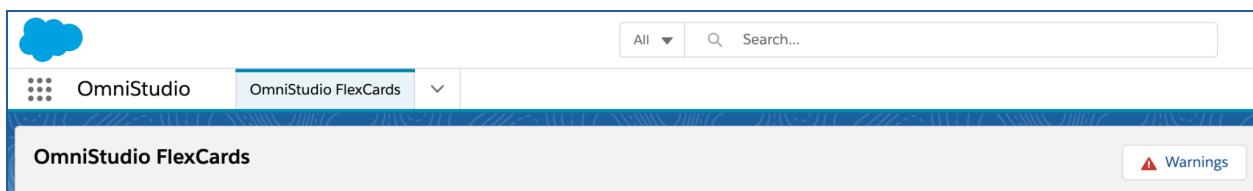
1. Sign up for a [free Developer Edition org with OmniStudio](#).
2. Fill out the form.
 - a. For Email, enter an active email address.
 - b. For Username, enter a username that looks like an email address and is unique, but it doesn't need to be a valid email account (for example, [yourname@omnistudiotrails.com](#)).
 - c. After you fill out the form, click **Sign me up**. A confirmation message appears.
3. When you receive the activation email (this might take about 10 minutes), open it and click **Verify Account**.
4. Complete your registration by setting your password and security challenge question.

Tip: Write down your username, password, and login URL for easy access later.

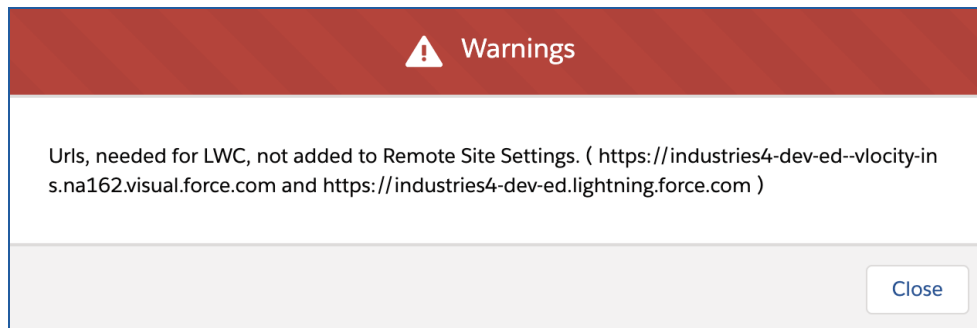
You are logged in to your Developer Edition and you can begin practicing.

Set Up Remote Site Settings for FlexCards

1. Click the App Launcher , and then select the **OmniStudio** App.
2. Open the dropdown menu and select **OmniStudio FlexCards**.



3. Click **Warnings**. The Warnings message displays, showing the URLs needed in Remote Site Settings for Lightning web components to work correctly in FlexCards.



4. Click the “**Gear**” icon to go to **Setup**. This opens a new tab.
5. In the **Quick Find** box, search for `Remote Site Settings` and click to open it.
6. Return to the tab with the Warnings message and copy the URL ending in **lightning.force.com**.
7. In the Remote Site Settings tab, click **Edit** next to the Remote Site ending in **lightning.force.com**.
8. Paste the URL you copied over the URL in the **Remote Site URL** field, then click **Save**.
9. Click **Remote Site Settings** to return to the list.
10. Click **Edit** next to the Remote Site ending in **visual.force.com**.
11. Return to the tab with the Warnings message and copy the URL ending in **visual.force.com**. Copy the URL.
12. Paste the URL you copied over the URL in the **Remote Site URL** field, then click **Save**.
13. Return to the tab with the Warnings message. Close the modal window and refresh the tab. The **Warnings** button is now gone.

Meet the Data Source Wizard

Requirements

“As a service agent, I'd like to view information about a customer account.”

Create a new FlexCard using the wizard, which prompts the data source setup.

Prerequisites

- None


Tasks

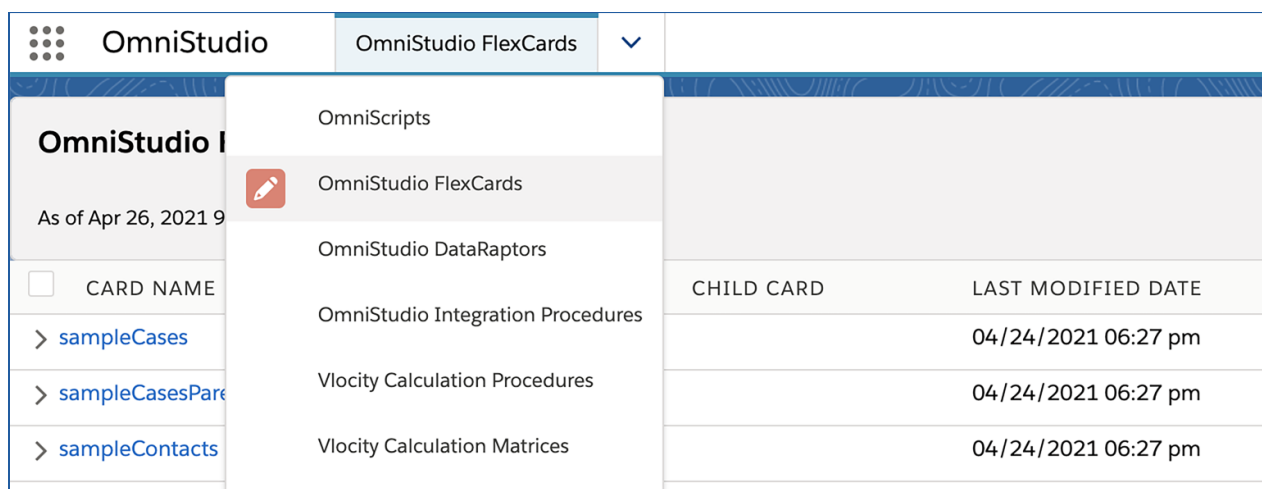
1. Create a FlexCard and Configure its Data Source
2. Explore the FlexCard Designer's UI

Time

- 10 mins
-

Task 1: Create a FlexCard and Configure its Data Source

1. Access the OmniStudio FlexCards Designer.
 - a. Click the **App Launcher**  .
 - b. Select the **OmniStudio** App.
 - c. Open the dropdown menu and select **OmniStudio FlexCards**.

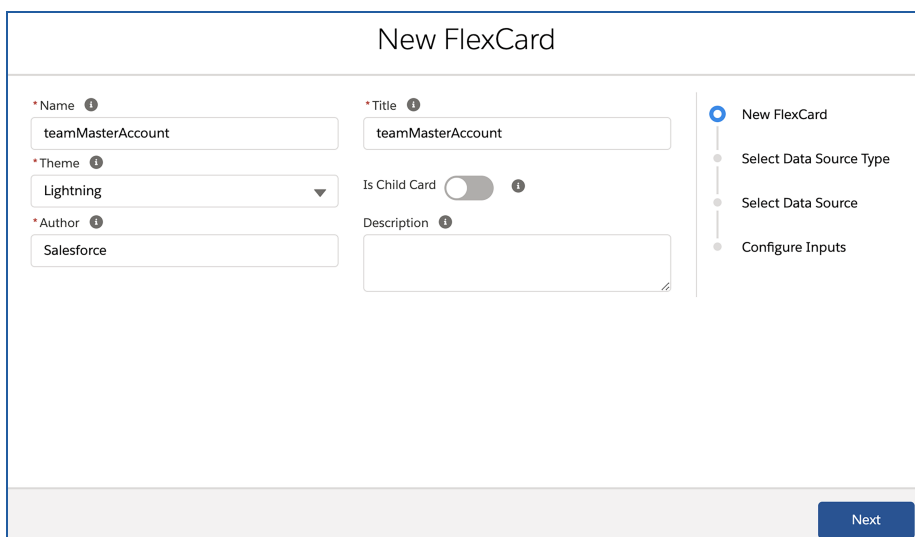


2. Use the Data Source wizard to create a new FlexCard.
 - a. Click **New** to create the FlexCard. Fill in the fields as follows:

Property	Value	Notes
Name	teamMasterAccount	Names can only contain underscores and alphanumeric characters. It must be unique, begin with a letter, have no spaces, not end with an underscore, and can't have two consecutive underscores. You cannot edit a FlexCard name after you create it. To change it, you must clone the FlexCard.
Title	Leave this as-is	This defaults to what you enter in the Name field.

Theme	Lightning	The two themes are Newport and Lightning . Keep this as Lightning .
Is Child Card		Because this is a parent FlexCard, leave as-is.
Author	The author defaults to your company name. Follow the same naming conventions as for the Name. If naming conventions aren't followed, an error prompts you to fix it.	Avoid non-ASCII characters and spaces to ensure URLs don't have characters like %20. Especially avoid the apostrophe (') such as in a name (e.g. D'Angelo). You can't change the author once you click Save at the end of the wizard process. To change it, you must clone the FlexCard.

b. Click **Next**.



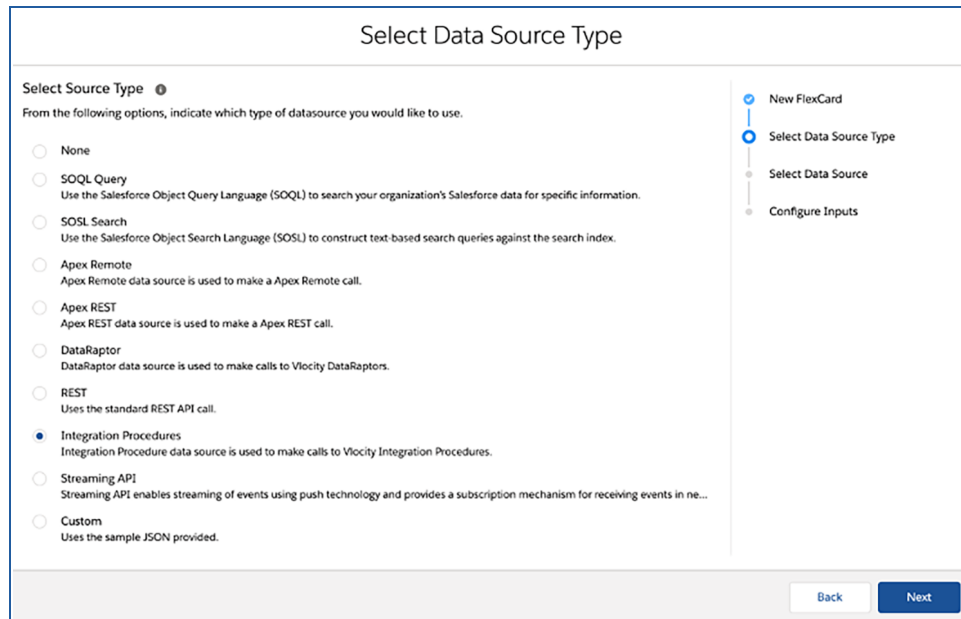

NOTE:

The combination of the FlexCard **Name** and **Author** must be unique in your Org. For example, if importing a FlexCard with the same name and author of a current FlexCard, you will be asked if you want to overwrite the current FlexCard in your org.

3. Select the data source type.

A FlexCard has one data source. As you add fields and other elements to the canvas, the values for the fields come from the data source you select

- a. Select **Integration Procedures**.
- b. Click **Next**.



Select Data Source Type

Select Source Type ⓘ

From the following options, indicate which type of datasource you would like to use.

- ☐ None
- ☐ SOQL Query
Use the Salesforce Object Query Language (SOQL) to search your organization's Salesforce data for specific information.
- ☐ SOSL Search
Use the Salesforce Object Search Language (SOSL) to construct text-based search queries against the search index.
- ☐ Apex Remote
Apex Remote data source is used to make a Apex Remote call.
- ☐ Apex REST
Apex REST data source is used to make a Apex REST call.
- ☐ DataRaptor
DataRaptor data source is used to make calls to Vlocity DataRaptors.
- ☐ REST
Uses the standard REST API call.
- ☒ Integration Procedures
Integration Procedure data source is used to make calls to Vlocity Integration Procedures.
- ☐ Streaming API
Streaming API enables streaming of events using push technology and provides a subscription mechanism for receiving events in ne...
- ☐ Custom
Uses the sample JSON provided.

Progress bar: New FlexCard, Select Data Source Type (current), Select Data Source, Configure Inputs

Back Next

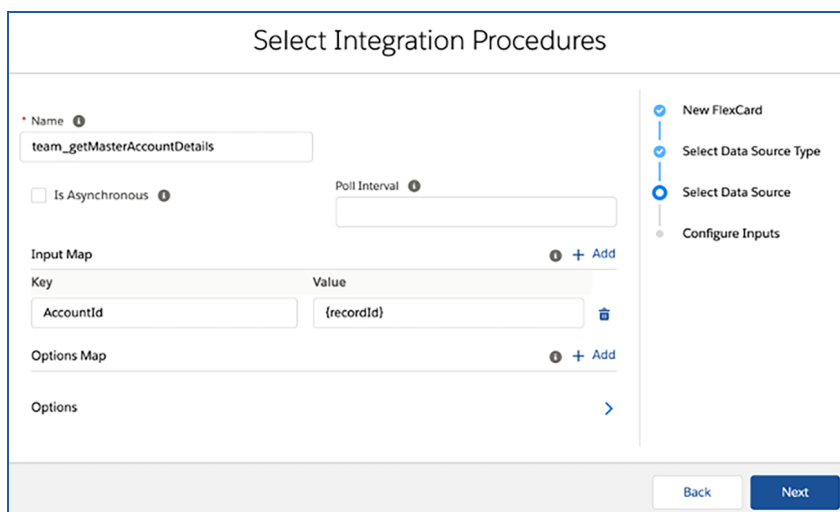
4. Select and configure the data source.
 - a. Click in the **Name** field to open a dropdown list, then select **team_getMasterAccountDetails**.

Start typing a part of the name to more easily select from a filtered list.
 - b. This is an integration procedure with stub data, not live data. Click + **Add** under **Input Map** and enter the following information:

Property	Value	Notes
----------	-------	-------

Key	AccountId	The name of this variable is arbitrary, but it's best practice to always be explicit about the information you're sending between OmniStudio tools. Here you want to explicitly say that you're sending an AccountId to the Integration Procedure.
Value	{recordId}	The piece of data you're sending with the variable name is the Record Id from this layout. The merge field syntax for a FlexCard layout is {VARIABLE NAME}.

- c. Click **Next**. If the **Next** button is greyed out and inactive, reselect **team_getMasterAccountDetails** in the Name field and then click **Next**.



5. Configure the inputs and confirm the test data is entering your JSON.
- Locate the TABLE and JSON tabs under **Test Response**.
 - Click the **JSON** tab.
 - Confirm the data has two different nodes: A Contact node with name, email, phone number, and Contact RecordId, and an Account node with account

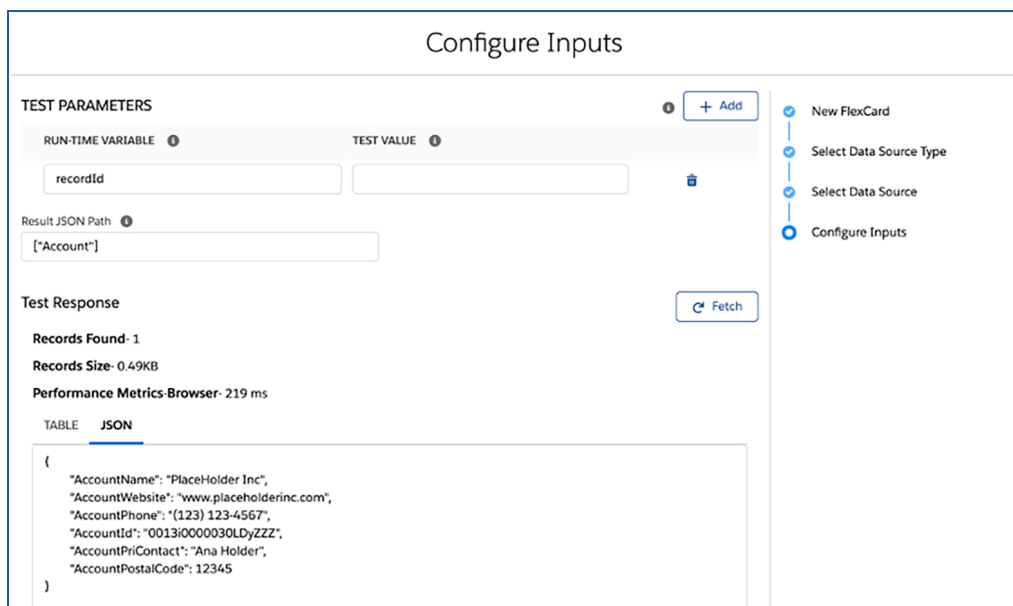
name, website, account phone, primary contact name, and postal code as well as Account RecordId.

At this stage, we're working with stub, or mock, data, not live data. Once you switch to live data, you'll add a test value and fetch it. Since you haven't linked live data yet, the **TEST PARAMETERS** are not needed now. This is used to preview your FlexCard with different parameters using real data.

6. Trim the JSON node to only provide Account data to the card.

Best practice is to only pass on the data that you need to use to a card. The FlexCard data source is retrieving both Account and Contact data. Because you're creating an Account-focused card, there's no need to bring the Contact data into the JSON for the card.

- a. Click in the **Result JSON Path** field and select **[“Account”]**.
- b. The JSON tab below now only displays Account data.



Configure Inputs

TEST PARAMETERS

RUN-TIME VARIABLE ⓘ TEST VALUE ⓘ

recordId

Result JSON Path ⓘ

[“Account”]

Test Response

Records Found: 1

Records Size: 0.49KB

Performance Metrics-Browser: 219 ms

TABLEREACT

JSON

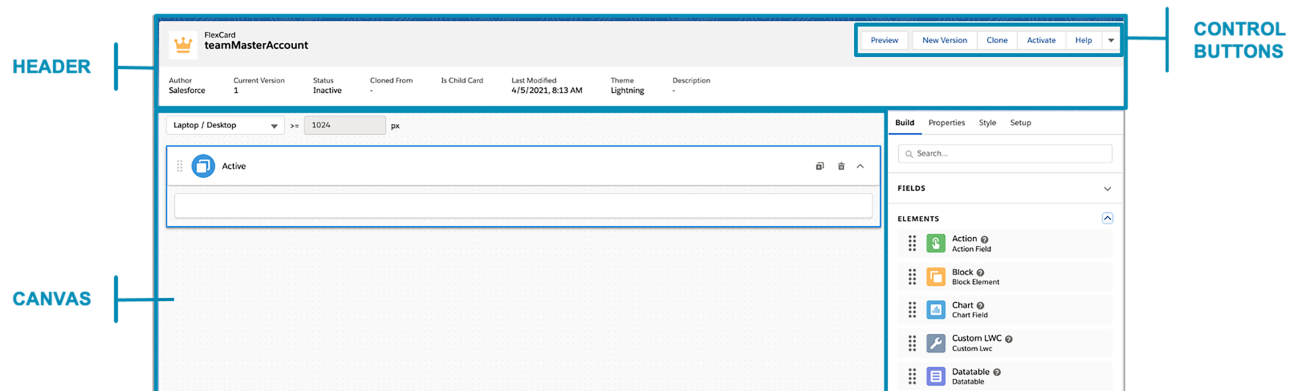
```
{
  "AccountName": "Placeholder Inc",
  "AccountWebsite": "www.placeholderinc.com",
  "AccountPhone": "(123) 123-4567",
  "AccountId": "0013i0000030LDyZZZ",
  "AccountPriContact": "Ana Holder",
  "AccountPostalCode": 12345
}
```

- c. Click **Save**. The new FlexCard is created and its Canvas is visible.

Task 2: Explore the FlexCard Designer's UI

Now that your FlexCard is created, you are ready to work on the FlexCard Canvas and build it using elements. Before that, get familiar with the FlexCard Designer user interface (UI).

1. Explore the **Header** and **Canvas**.



- a. In the **Header**, you'll see basic metadata about your FlexCard, such as the **Author**, **Current Version**, **Status**, and **Last Modified** date and time.


The **Author** tells who created the FlexCard. **Current Version** tells what version of the FlexCard you're in. The **Status** tells you whether the FlexCard is active. You can only make changes to an inactive FlexCard. The **Last Modified** field is when this version was last worked on.

- b. The **Canvas** is where you build your FlexCard. You drag elements from the **Build** panel onto the canvas.

You can also perform actions to your FlexCard in the Header with **control buttons**, such as toggle between **Design** view and **Preview**, create a **New Version**, **Export** the FlexCard, **Clone**, **Activate** or **Deactivate**, and configure **Publish Options**.

There is also a **Help** button, where you can access a list of links to resources, called In-Product Help.

2. When you create a new FlexCard, it already has an Active state and the **Build** panel is open. Explore the **Build** panel.


- a. Notice the long list of elements. To build on the canvas, you select and drag from this list on to the FlexCard State. Click the small question mark  next to any of the elements to view In-Product Help on them.
- b. Drag an **Action** element from the **Build** panel to the canvas. Notice that after you drag an element to the canvas, it triggers a switch from the **Build** panel to the **Properties** panel.
- c. Return to the **Build** panel. Drag a **Field** element to below the action.



3. Explore the **Properties** panel.

Properties is where you configure element properties when an element is selected on the Canvas. What you see in the panel depends on the Element type. Use Field and Action elements for a comparison.

- a. Verify the **Field** element you just added to the canvas is selected and the **Properties** panel is open.
- b. When a **Field** element is selected, you can change the field name, add a field label, enter placeholder text, select the field type, and add a condition that determines when the field displays.

Tooltips are small popover windows that give you in-line information about specific properties. Hover over the tooltip icon  to view them.



- c. Select the **Action** element. View the **Properties** panel.
- d. Notice that an **Action** element has a lot more properties to configure than a Field element due to the nature of its functionality. For example, you can set the action type, select an icon for the action, select the target, and where you want the target opened.

4. Go to the **Style** panel. This is where we customize the look and feel of your FlexCard by styling elements using a user interface (UI) to choose and configure the text color, borders, and backgrounds, sizes and padding of fonts and entire elements, and make elements responsive.
 - a. Scroll through the panel and note the sections: **DIMENSIONS**, **APPEARANCE**, and **ALIGNMENT**.
 - b. The **CUSTOM CSS** section is for custom design needs. You can create and apply custom CSS here, including CSS classes with an in-product code editor.
5. Explore the **Setup** panel.
 - a. Go to the **Setup** panel. Update or change the data source here at any time.
 - b. Scroll down to the **DATA SOURCE** section. You selected and configured your data source with the wizard.

When you replace the stub data in the selected Integration Procedure, you will return to the Setup panel to use the test parameters and make sure everything is properly connected.

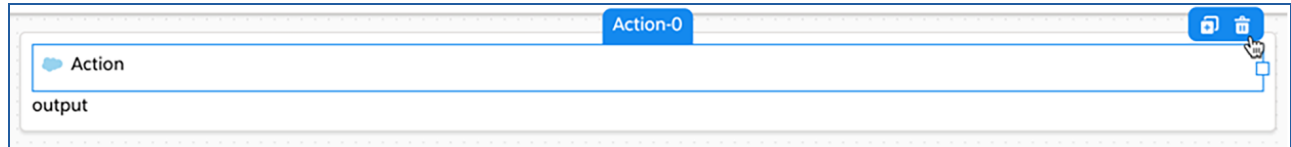


TIPS:

If in doubt about how to use a feature or what to put in a field, look for the  or .

6. Remove the Action and Field elements from the FlexCard.
 - a. With the Action element selected, click the trashcan / bin icon to remove it. Be careful not to remove the state.

Each FlexCard has a default Active state. States display records that we specify using elements. Add a State element to the FlexCard canvas to present different interactions and layouts based on specified conditions.
 - b. Remove the Field element.



Review

Confirm your understanding by answering these questions.

1. How can you change the Author of a FlexCard?
2. What are the naming restrictions for the Name and Author fields?
3. What are some of the data sources available in a FlexCard?
4. Where can you set and configure the data source for a FlexCard?
5. Why did you filter the JSON node on the FlexCard?
6. Why didn't you need to use test values in this lab?
7. What panel needs to be open in order to drag elements onto a FlexCard canvas?
8. Why are the Name, Title, and Author fields disabled in the Setup panel in every FlexCard?