


Before You Begin

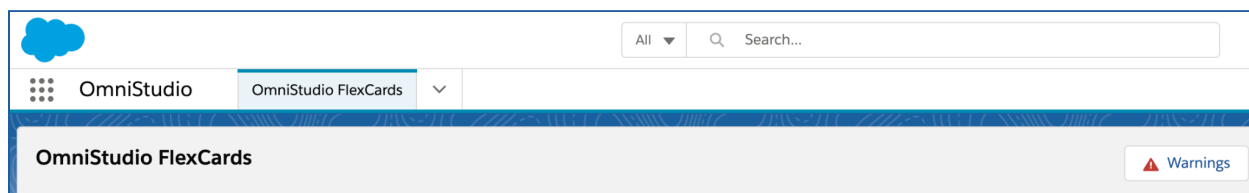
Did you sign up for a special OmniStudio Developer Edition org already? You'll need one to do the steps in this guide. Here's how to request one if this is your first time completing an OmniStudio module:

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.

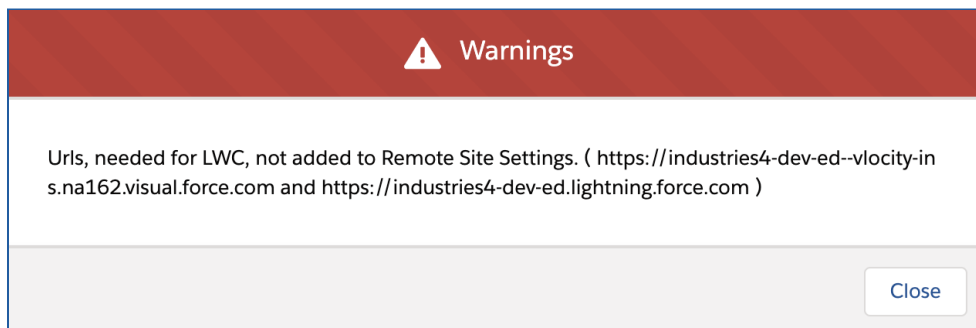
You are logged in to your Developer Edition and you can begin practicing.

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.

Work with Child FlexCards

Requirements

“As a service agent, I'd like to view information about a customer account, including a list of contacts and cases associated with the account.”

Customize two prebuilt child FlexCards to display contact and case data for an account. Then embed them inside two prebuilt parent FlexCards that have collapsible blocks.

Prerequisites

- None

Tasks

1. Build the Contacts Child FlexCard and Embed it in its Parent
2. Build the Cases Child FlexCard and Embed it in its Parent

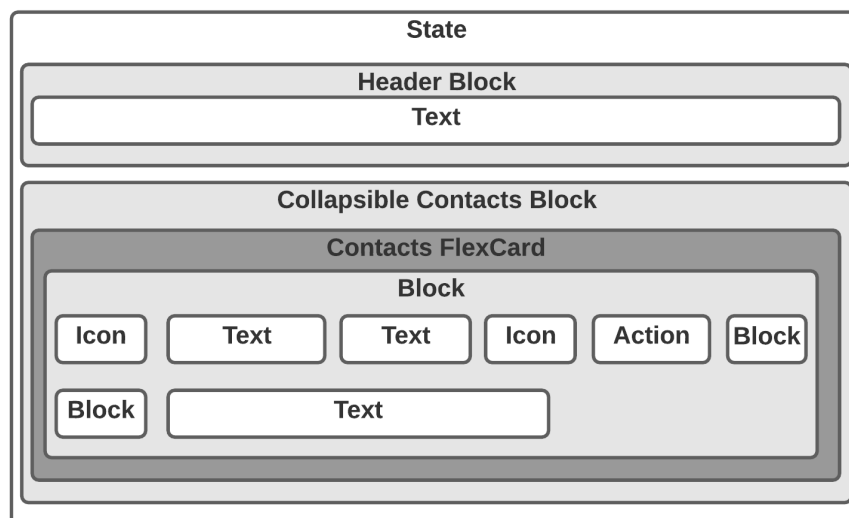
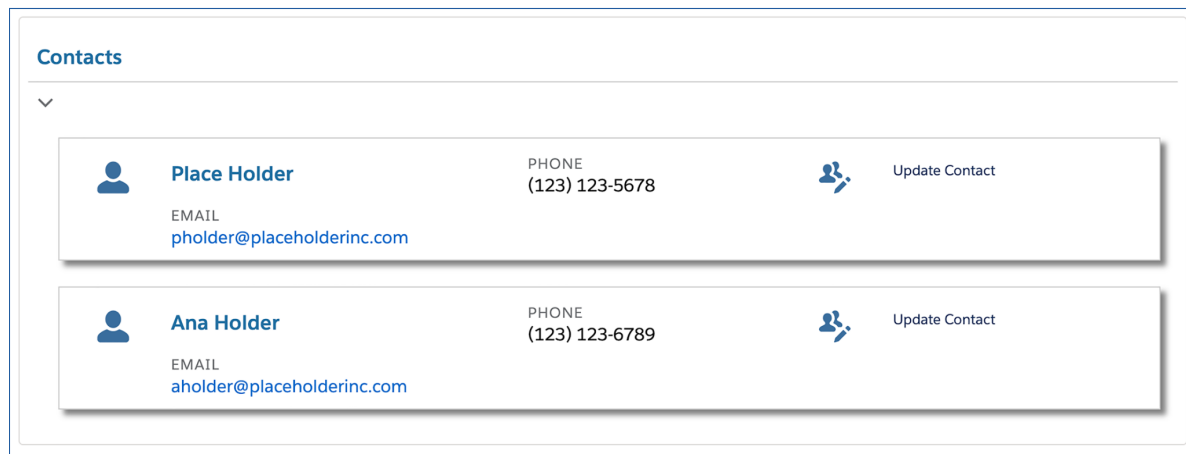
Time

- 20 mins

Task 1: Build the Contacts Child FlexCard and Embed it in its Parent

In this lesson, you use pre-built parent FlexCards for the Contacts and Cases data and embed child FlexCards to them with the **FlexCard** element.

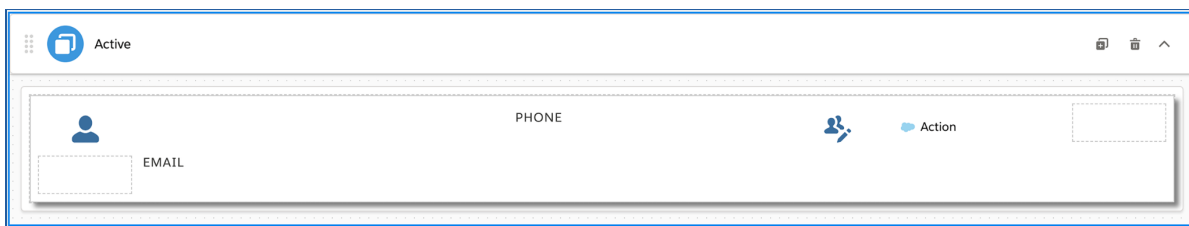
What You Will Build



1. Create the Contacts child FlexCard.
 - a. Go to the **OmniStudio FlexCards** tab.

- b. In the **Search/Find in page** box, type the keyword `team`.
- c. From the search results, expand **teamStarterContacts**.
- d. Click **teamStarterContacts (Version 1)**.
- e. Click the **Clone** button in the Header.
- f. Rename the Card `teamContacts` and click **Clone**.

Notice the FlexCard is already built out and styled with field and action elements inside a block. However, the FlexCard is not displaying any data because the data source is not configured yet. The action is also not configured.



2. Configure the data source.

- a. Go to the **Setup** panel. Scroll down to the **DATA SOURCE** section. Configure as follows:

Field	Value
Data Source Type	Integration Procedures
Name	<code>team_getMasterAccountDetails</code>
Input Map Key and Value	Add the same input map variable and value as you did for the master account layout: <code>AccountId</code> and <code>{recordId}</code> .

- b. Click **Save & Fetch** and verify you see the two placeholder contacts in the **JSON** tab. This indicates the stub data is being retrieved successfully.

Records Size: 0.49KB
Performance Metrics-Browser: 202 ms

TABLE JSON

```
{
  "Contact": [
    {
      "ContactName": "Place Holder",
      "ContactEmail": "pholder@placeholderinc.com",
      "ContactPhone": "(123) 123-5678",
      "ContactId": "0033i0000029WovZZZ"
    },
    {
      "ContactName": "Ana Holder",
      "ContactEmail": "aholder@placeholderinc.com",
      "ContactPhone": "(123) 123-6789",
      "ContactId": "0033i0000029Wp0ZZZ"
    }
  ],
  "Account": {
    "AccountName": "Placeholder Inc",
    "AccountWebsite": "www.placeholderinc.com",
    "AccountPhone": "(123) 123-4567",
    "AccountId": "0013i0000030LDyZZZ",
    "AccountPriContact": "Ana Holder",
    "AccountPostalCode": 12345
  }
}
```

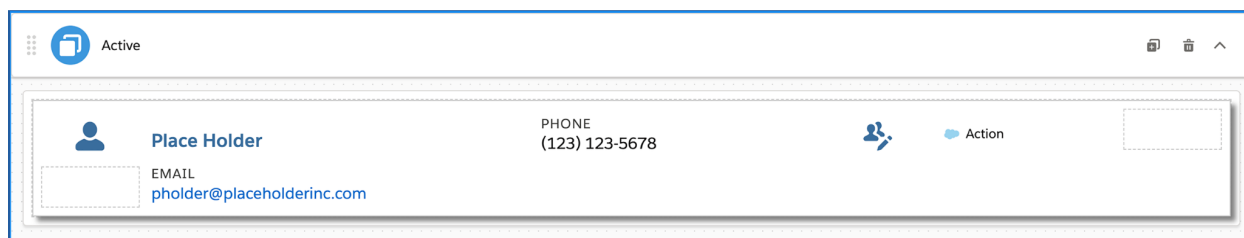
- c. Click **Ok** to exit from the window.



NOTE:

Even though there are two contacts in the stub data, you see one of them in Design mode. Don't be alarmed if you don't see both on the canvas. Once you preview, all data displays.

- d. In the **Setup** panel, locate the **Result JSON Path** field and select [**"Contact"**].
- e. Verify the contact information is displayed. If it is not, you may need to click **Save & Fetch** again.



3. Configure the action to launch an OmniScript updating the contact in a modal window.

A flyout is a type of action that displays additional data in a modal window or popover. For this OmniScript action you want to launch the OmniScript in a modal window instead of a new tab/window. To do this, use a flyout action and select OmniScripts as the component to display.

- a. Select the action element in the block and configure it as follows:

Field	Value
Action Type	Flyout
Label	Update Contact
Icon	Leave this blank or as-is
Flyout Type	OmniScripts
Flyout	team/editContact/English
Layout Type	Lightning
Attributes	Click + Add New
Key	ContextId
Value	{ContactId}
Open Flyout In	Modal
Hide Icon	Check this box







NOTE:

The attribute added to the action maps the ContextId from the OmniScript to the FlexCard. If this isn't mapped, the data would not display.

4. Activate the FlexCard.
 - a. **Preview** the FlexCard.

Desktop ▾ Add Test Params

	Place Holder EMAIL pholder@placeholderinc.com	PHONE (123) 123-5678	 Update Contact
	Ana Holder EMAIL aholder@placeholderinc.com	PHONE (123) 123-6789	 Update Contact



NOTE:

Flyout actions are visible in Preview. Since the OmniScript is not built yet, clicking **Update Contact** will not work. You can preview the action after the OmniScript is created and also when real data is linked.

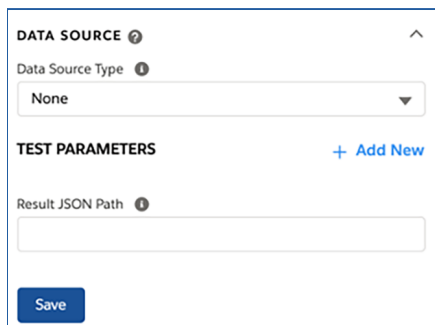
- b. Click **Activate**. You don't need to set Publish Options for this FlexCard, as it's going to be used only in the parent FlexCard.
 - c. Click **Done**.
5. Embed the Contacts child FlexCard in the **teamContactsParent** FlexCard.
 - a. Return to the **OmniStudio FlexCards** tab. Refresh it.
 - b. In the Search/Find in page box, type the keyword `team`.
 - c. From the search results, expand **teamContactsParent**.
 - d. Click **teamContactsParent (Version 1)** to open it.

Active

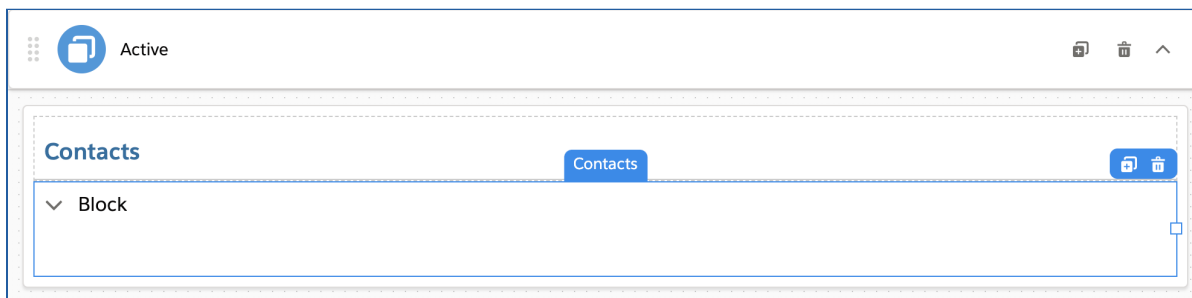
Contacts

▼ Block

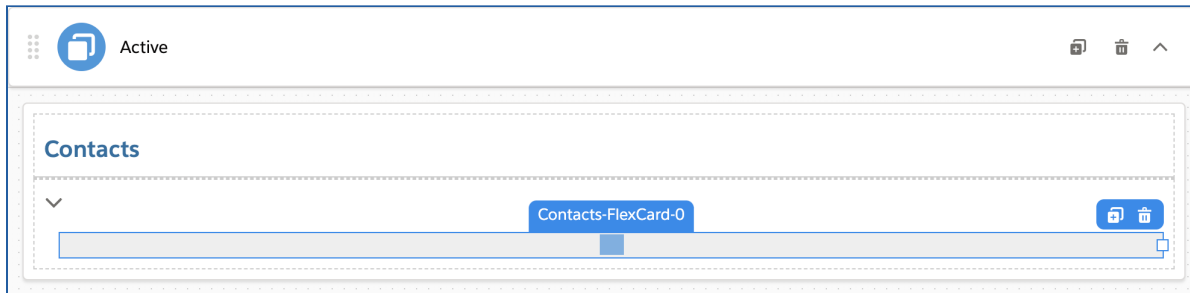
- e. Go to the **Setup** panel and scroll to **DATA SOURCE**. Note that the source is set to **None**. For the Contacts data, set the data source on the child FlexCard, do not push from the parent data source, so leave this as-is.



- f. Select the block element named **Contacts** below the icon and Contacts header.



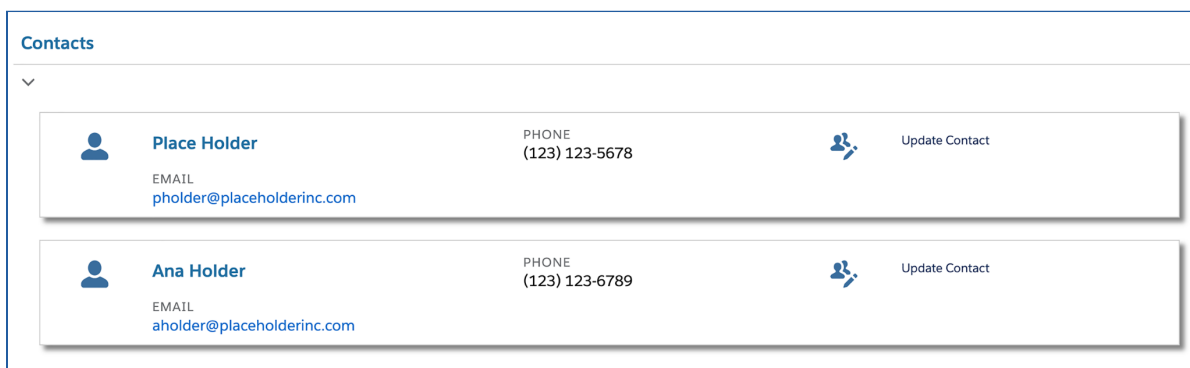
- g. Note in the **Properties** panel that **Collapsible** is selected. This allows the block to be collapsed and hide the fields inside it.
- h. Remove the placeholder text **Block** from the Label field.
- i. Make the block **Collapsed By Default**.
- j. Expand the block again by clicking the down arrow in the top left corner of the block. It must be expanded to add an element to it.
- k. Go to the **Build** panel.
- l. Drag a **FlexCard** element to the expanded **Contacts** block.



- m. In the **Properties** panel, locate the **FlexCard Name** field.

Start typing `team` and select **teamContacts**. Refresh the page again if you don't see it in the list.

- n. **Preview** the FlexCard. Try out the collapsible feature to make sure the block expands and shows the data.



NOTE:

If you see this error in Preview mode: **This page has an error. You might just need to refresh it. [PromiseRejection: [object Object]]**, remove it by clicking **Add Test Params** and entering the Record Id for Acme. This is the FlexCard Designer's prompt to enter a Record Id in Preview. The error will not block you from viewing the FlexCard, so you can ignore it or enter test params.

To get Acme's Record Id:

1. Duplicate the browser tab, then use the App Launcher to open the **OmniStudio Console**.
2. Select **Accounts** from the Object dropdown.
3. If needed, switch the view to **All Accounts**.

4. Click **Acme** to view Acme's detail page.
5. Copy the RecordId from the URL (Account Ids always begin with 001, Contact Ids with a 003) and paste it somewhere to use it again.
6. Return to the FlexCard preview and paste the RecordId into the **Value** field.

- o. Click **Activate**.
- p. Click **Publish Options** and verify that the targets **App Page**, **Home Page**, and **Record Page** are selected. This allows you to choose where the FlexCard is accessible. You can also change the visible name of the activated FlexCard.
- q. Close the dialog box by clicking **Cancel** or **Save**.

Publish Options

Interface Editor

Master Label

teamContactsParent

Description

API Version

48.0

Runtime Namespace


vlocity_ins

Is Exposed

☒

Add SVG resource / Drop it here

Select SVG



Targets

☒ App Page

☒ Home Page

☒ Record Page

☐ Community Page

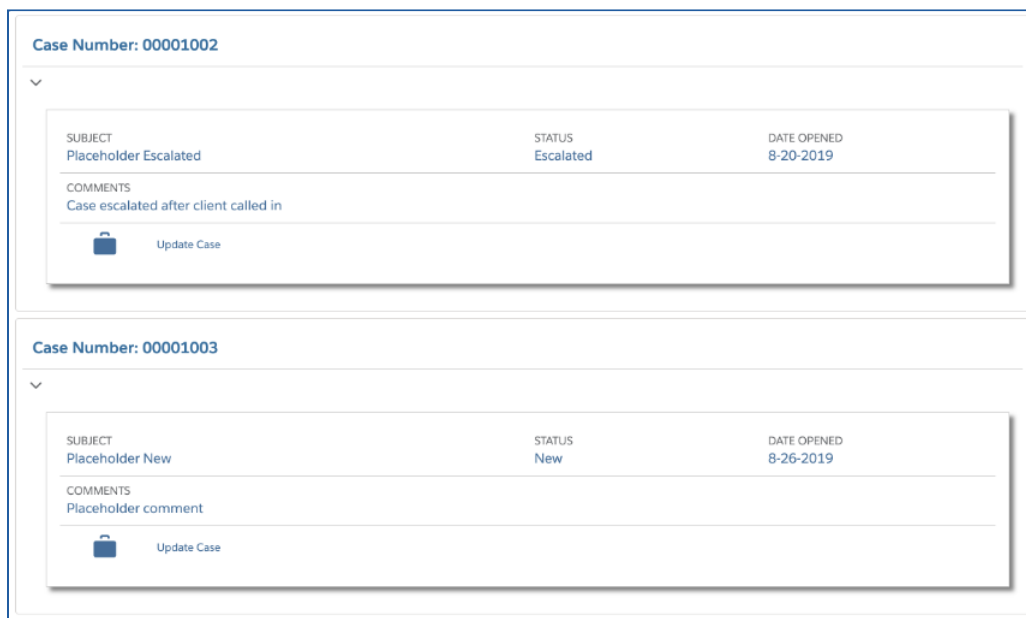
☐ Community Default

Cancel

Save

Task 2: Build the Cases Child FlexCard and Embed it in its Parent

What You Will Build



Case Number: 00001002

SUBJECT Placeholder Escalated STATUS Escalated DATE OPENED 8-20-2019

COMMENTS Case escalated after client called in

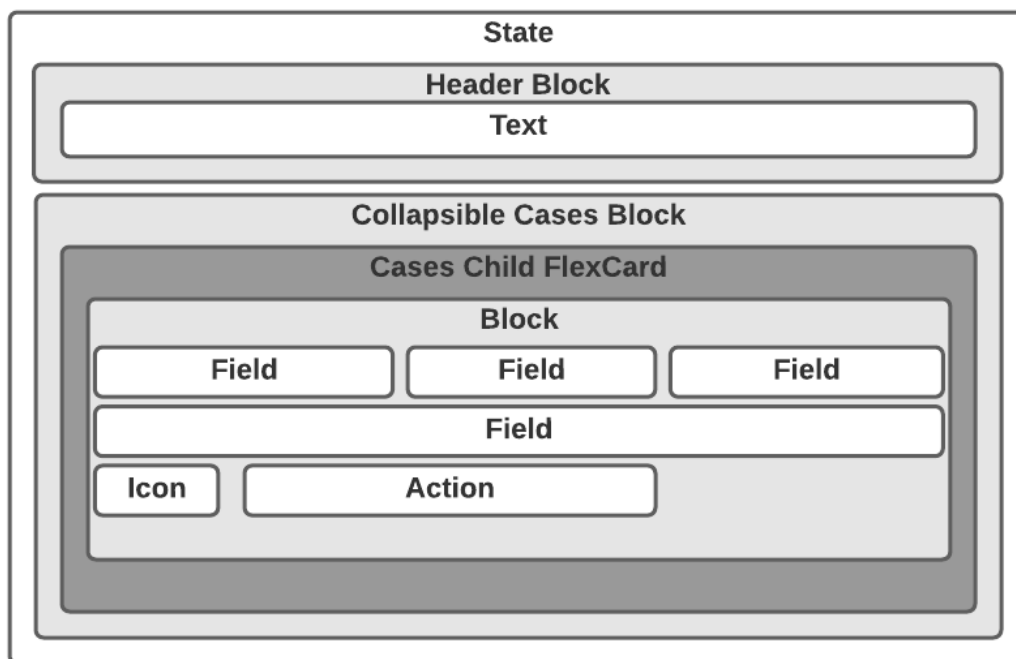
Update Case

Case Number: 00001003

SUBJECT Placeholder New STATUS New DATE OPENED 8-26-2019

COMMENTS Placeholder comment

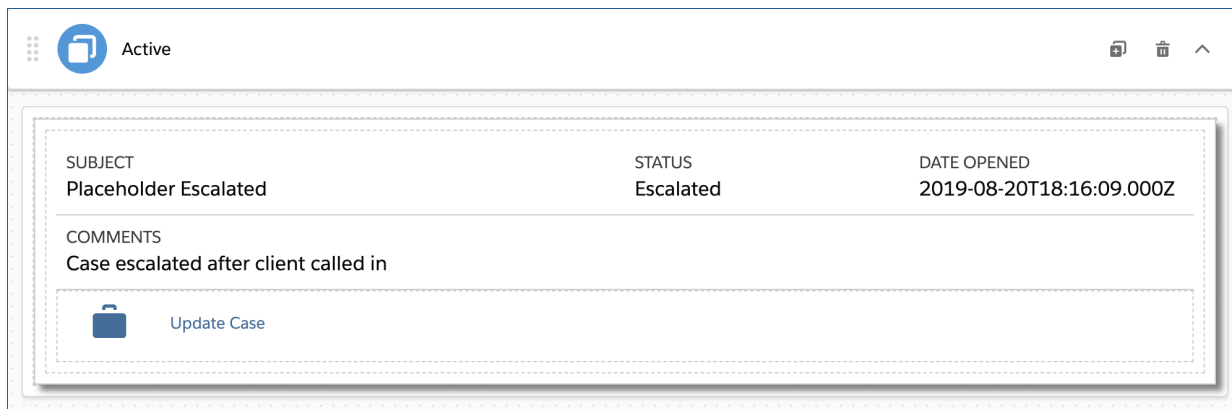
Update Case



1. Create the Cases child FlexCard.
 - a. Go to the **OmniStudio FlexCards** tab.
 - b. In the Search/Find in page box, type the keyword `team`.
 - c. From the search results, expand **teamStarterCases**.
 - d. Click **teamStarterCases (Version 1)**.
 - e. Click the **Clone** button in the Header.
 - f. Rename the Card `teamCases` and click **Clone**.


The FlexCard is already built out, with the data source and **Update Case** action configured and the elements styled.

Notice the **Date Opened** field. For fields that display a date, date time, number, or currency, you must also make sure the **Field Type** matches it. You'll set the correct Field Type for the date, then switch the data source for this FlexCard to use the parent's data source.



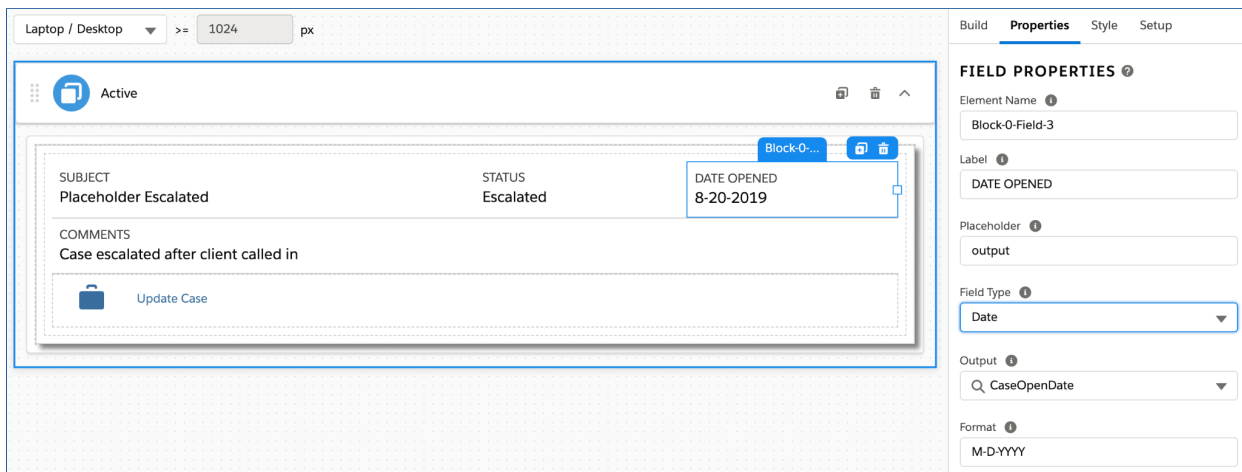
SUBJECT	STATUS	DATE OPENED
Placeholder Escalated	Escalated	2019-08-20T18:16:09.000Z

COMMENTS
Case escalated after client called in

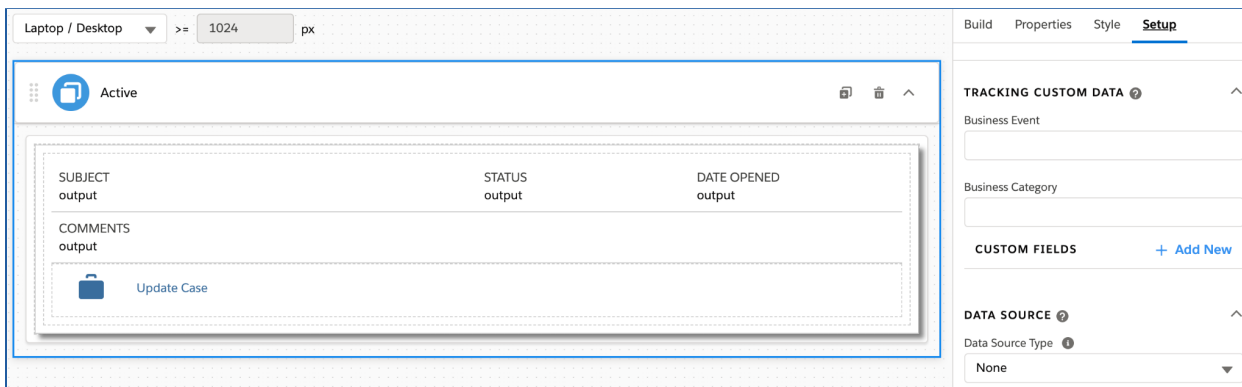
 Update Case

2. Select the correct field type for the **Date Opened** field.
 - a. Select the **Date Opened** field.
 - b. In the **Field Type** dropdown, select **Date**. Read the tooltip. Use the Field element to display other field types, including a text, a number, currency, and a date with time.

- c. Note the format. Click the tooltip to read more about it. Change the format to D-M-YYYY.
- d. Leave it in the Day-Month-Year format, or change it back to M-D-YYYY.



3. Set the data source to take from its parent and preview and activate the FlexCard.
 - a. Go to the **Setup** panel and scroll to the **DATA SOURCE** section.
 - b. Select **None** in the **Data Source Type** dropdown menu. This changes all the fields to show **output**, which is the placeholder text. Configure the parent FlexCard with the Integration Procedure used to preview the child FlexCard.





NOTE:

In this lab, you set the data source to **None** for the Cases child FlexCard because we want you to see that the child uses the parent data source in the next task. However, you don't need to touch the data source at all, since if the FlexCard element in the parent is configured to push data to the child, the parent data source overrides the child data source.

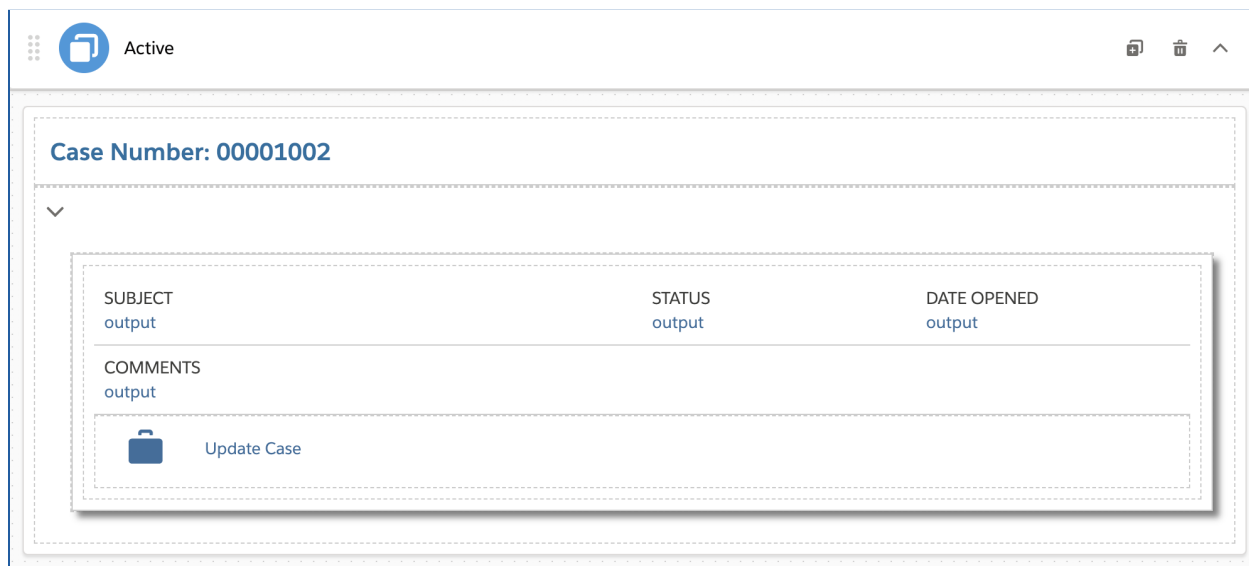
- c. Click **Preview**.
 - d. **Activate**. You don't need to set Publish Options for this FlexCard.
 - e. Click **Done**.
4. Embed the **teamCases** child FlexCard to the **teamCasesParent** FlexCard and activate it.
- a. Go to the **OmniStudio FlexCards** tab.
 - b. Open the **teamCasesParent** FlexCard.
 - c. Go to the **Setup** panel and scroll to the **DATA SOURCE** section. Verify the following information:

Field	Value
Data Source Type	Integration Procedures
Name	team_getCaseList
Input Map > Key	AccountId
Input Map > Value	{recordId}
Result JSON Path	["Cases"]

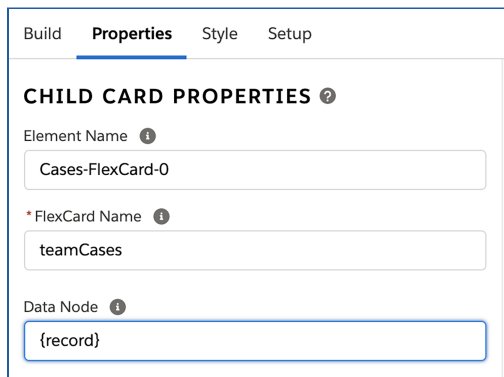
The **Cases** block is already **Collapsible** and **Collapsed By Default**. The only thing left to do is to add the child FlexCard and pass the parent data.

- d. Expand the **Cases** block. Go to the **Build** panel and drag a **FlexCard** element inside it.

- e. Locate the **FlexCard Name** field.
- f. Start typing `team` and select **teamCases**. Refresh the page if you don't see it in the list.



- g. The child FlexCard is now embedded, but you only see the placeholder **output** text.
- h. Read the tooltip next to the **Data Node** field. To pass the parent data to the child, you must select a data node. In this case, you want to use `{record}` to pass all the data available for the applicable fields.



Build **Properties** Style Setup

CHILD CARD PROPERTIES ?

Element Name ⓘ
Cases-FlexCard-0

* FlexCard Name ⓘ
teamCases

Data Node ⓘ
{record}

- i. **Preview** the FlexCard. Expand the first case, **Case 00001002**.

- j. Click **Activate**.
- k. Click **Publish Options** and verify that the targets **App Page**, **Home Page**, and **Record Page** are selected. Close the dialog box by clicking **Cancel** or **Save**.

Review

Confirm your understanding by answering these questions.

1. What are some advantages of using child FlexCards?
2. How can you change a FlexCard's name?
3. What is the best way to add a field that displays a date or currency and why?
4. Can a child FlexCard have its own data source?
5. How do you configure a child FlexCard to use the data source of its parent FlexCard?