Get and Combine Internal Data for FlexCards

NOTE:
Did you sign up for a [special OmniStudio Developer Edition org] already? You'll need one to do the steps in this guide. If not, use the link to fill out the form and have an org delivered to your inbox. The Exercise Guide in the first unit of this module has more detailed steps for this process if you need them.

Requirements

Configure the same OmniStudio Integration Procedure and DataRaptor Extract to get data for both the Account and Contacts FlexCards.

Prerequisites

- None

Tasks

- Build with Multiple Nodes in JSON Output

Time:

- 25 mins

Task: Build with Multiple Nodes in JSON Output

1. Configure the teamGetMasterAccountDetails DataRaptor.

    a. Open the **App Launcher**, and select the **OmniStudio** app.

    b. Click the dropdown arrow to open the menu and select **OmniStudio DataRaptors**.

    c. Locate and open **teamStarterGetMasterAccountDetails**.

    d. Click **Clone**.

    e. In the Name field, enter `teamGetMasterAccountDetails`, then click **Save**.

    f. On the EXTRACT sub-tab, to add the extract for the Primary Contact, click **+ Add Extract Step** and fill in the fields as follows:

Object Type	Extract Output Path	Filter	Symbol	Variable
Contact	`PriContact`	Id	=	`Account:vlocity_ins__PrimaryContactId__c`

TIPS:
In a DataRaptor, you can use filter criteria from an Object that was used in an earlier extract step. Here the variable is saying you want to filter using a particular field in the Account (the Primary Contact field).

If you prefer to copy and paste from within the system, you can locate the field name by expanding the **Extraction Step** JSON and selecting the **Show all sObject Fields** checkbox.

    g. Click **OUTPUT**.

h. Use **Quick Match** to map the field as follows:

Input Mapping	Output Mapping
PriContact:Name	Account:AccountPriContact

i. Click **Save**.

j. Expand both **Expected JSON Output** and **Current JSON Output** and confirm the structure of the JSON nodes match each other.

2. Update and Activate the Get Master Account Details Integration Procedure.

   a. From the dropdown, select **OmniStudio Integration Procedures** and open **team/getMasterAccountDetails > Team Starter Master Account (Version 1)**.

   b. Click **Create Version** and update the name to **Team Get Master Account**.

   c. Select the **DRGetMasterAccountDetails** element.

   d. Click **DataRaptor Interface** and select **teamGetMasterAccountDetails**.

   e. Click **Procedure Configuration > Activate Version**.

3. Preview the Integration Procedure on the sampleMasterAccount FlexCard.

   a. From the dropdown, select **OmniStudio FlexCards**.

   b. Search for sampleMasterAccount **> sampleMasterAccount (version 1)**.

   c. In the Header, click **New Version**.

   d. Click **Setup** and scroll to the bottom to **TEST PARAMETERS**.

   e. In the **Value** field, paste in **Acme's RecordId**.

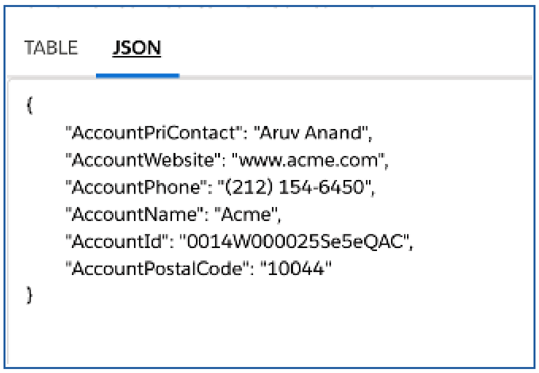
NOTE:
If you don't already have it, locate Acme's Record Id as follows:

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 and paste the RecordId into the **Value** field.

f. Click **Save & Fetch**.

g. Confirm the JSON displays data for Acme.



NOTE:
If this is your first time using FlexCards in this org, FlexCard preview won't be enabled unless you set up remote site settings for the FlexCard. See instructions at the end of this document if you need them.

Review

Confirm your understanding by answering these questions.

1. How do you recognize a node in the JSON?
2. Why do you think the DataRaptor used the order of Objects on the Extract tab that it did?
3. Where did you preview the Integration Procedure?

Build an Integration Procedure and DataRaptor Extract for the Cases FlexCard

Task 1: Build a Data Raptor to Display Case Data

1. Build the Get Case List DataRaptor.
    a. From the dropdown, select **OmniStudio DataRaptors** and click **New**.
    b. Enter the following information to create the DataRaptor.

Property	Value
DataRaptor Bundle Name	`teamGetCaseList`
Interface Type	Extract
Input Type	JSON
Output Type	JSON

    c. Click **Save**.

2. Define the objects you are extracting data from.
    a. Confirm you are on the **EXTRACT** sub-tab.
    b. Click **+ Add Extract Step**.
    c. In the top field, select **Case**.
    d. In the **Extract Output Path**, enter `Case`.
    e. In the **Filter** field, select **AccountId.**
    f. In the final field, enter `AccountId`.
    g. Click the dropdown icon for the extract filter and select **AND** to add a second filter.

h. Fill in the additional filter fields as follows:

Property	Value
Filter	Status
	<>
Variable	`"Closed"`

i. Click the **triangle** to the right of the variable and select **ORDER BY**.

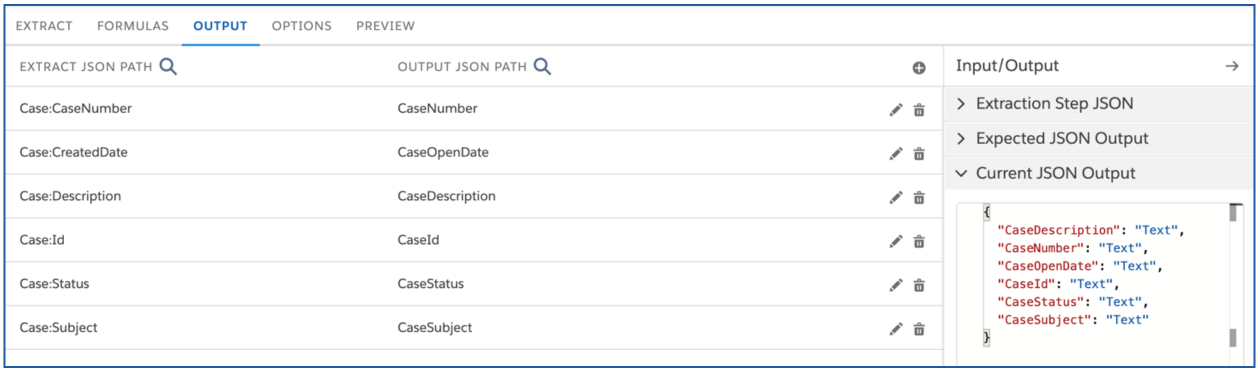
j. Enter `CaseNumber DESC` for the order.

3. Define the output path for your DataRaptor.

   a. Select the **OUTPUT** sub-tab.

   b. In the upper right-hand corner, click the (grey +) to add an extract path and continue as needed to create the following:

EXTRACT JSON PATH	OUTPUT JSON PATH
Case:CaseNumber	`CaseNumber`
Case:CreatedDate	`CaseOpenDate`
Case:id	`CaseId`
Case:Status	`CaseStatus`
Case:Subject	`CaseSubject`
Case:Description	`CaseDescription`



4. Preview the JSON for your DataRaptor.
   a. Select the **PREVIEW** tab.
   b. Click **Edit as Params**.
   c. Click **+ Add New Key/Value Pair**.
   d. Enter the following:

Property	Value
Key	`AccountId`
Value	[Acme's AccountId]

   e. Click **Execute**.
   f. Confirm the all open Case details for Acme display in the response.

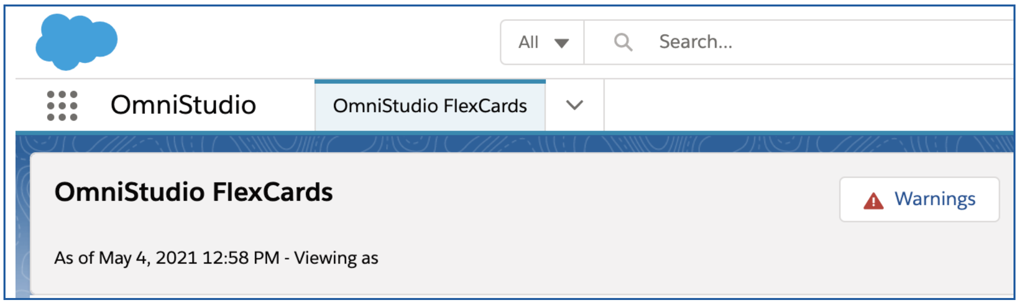

```
[
  {
    "CaseDescription": "Customer has not received a recent invoice and is inquiring about their
billing status.",
    "CaseSubject": "Billing status",
    "CaseStatus": "New",
    "CaseId": "5004x000000p6NOAAY",
    "CaseOpenDate": "2020-11-05T16:03:56.000Z",
    "CaseNumber": "00001006"
  },
  {
    "CaseDescription": "Customer's contact phone number has changed. Requests a call to update
the number.",
    "CaseSubject": "Update account phone number",
    "CaseStatus": "New",
    "CaseId": "5004x000000p6NNAAY",
    "CaseOpenDate": "2020-11-05T16:03:56.000Z",
    "CaseNumber": "00001005"
  },
  {
    "CaseDescription": "Customer ran a trace with Fedex but can't track most recent order. Fedex
tracking # 399080984309334 34.",
    "CaseSubject": "Cannot track our order",
    "CaseStatus": "On Hold",
    "CaseId": "5004x000000p6NLAAY",
    "CaseOpenDate": "2020-11-05T16:03:56.000Z",
    "CaseNumber": "00001004"
  }
]
```

Task 2: Build an Integration Procedure to Display Case Data

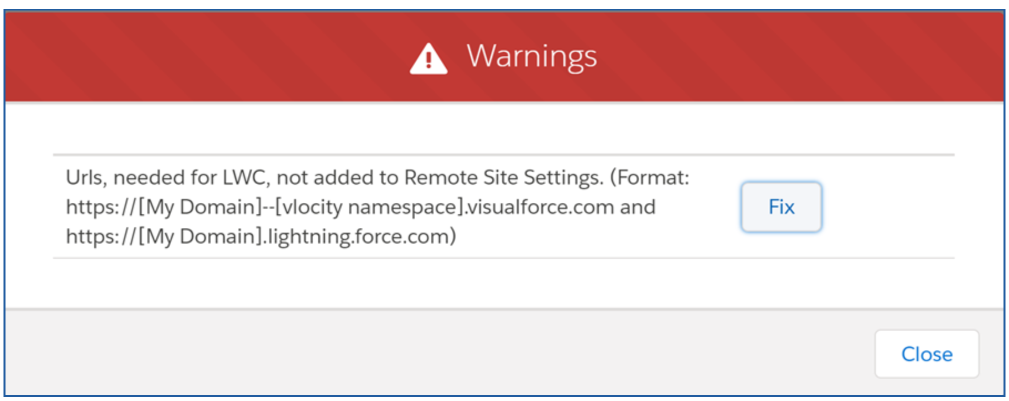
1. Update and Activate the Get Case List Integration Procedure.
    a. From the dropdown, select **OmniStudio Integration Procedures** and open **team/getCaseList > Team Stub Get Case List (version 1)**.
    b. Click **Create Version** and update the name to **Team Get Case List**.
    c. Delete the Set Values element **SetValues**.
    d. Drag a **DataRaptor Extract Action** component into the STRUCTURE panel below **Procedure Configuration**.
    e. Name the element `DRGetCaseList`.
    f. Click **DataRaptor Interface** and select **teamGetCaseList**.
    g. In the **INPUT PARAMETERS** table, click **+ Add Input Parameter**.
    h. Enter `AccountId` for both **Data Source** and **Filter Value**.
    i. Copy the element name (**DRGetCaseList**).
    j. Select the **Response Action** element.
    k. In the **Send JSON Path** field, replace **SetValues** with the name of the DataRaptor Element (**DRGetCaseList**).
    l. Click **Procedure Configuration > Activate Version**.
2. Preview the Integration Procedure in the team Case Details FlexCard.
    a. From the dropdown, select **OmniStudio FlexCards** and open **sampleCasesParent**.
    b. In the header, click **New Version**.
    c. In the **Setup**, scroll down to **Test Parameters**.
    d. Under **Test Parameters,** paste the Acme RecordId into the **Value** field.
    e. In the **Result JSON Path** field remove [“Cases”].
    f. Click **Save & Fetch > JSON** and confirm the Acme cases display. Click **OK**.
    g. In the header, click **Preview**. (If you have not used this org for FlexCards before, see Setup Remote Site Settings for FlexCards at the end of this document).
    h. Expand the FlexCard and confirm the Acme cases display.
    i. Click **Activate**.

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 **Edit** next to the Remote Site ending in **visual.force.com**.

10. Return to the tab with the Warnings message and copy the URL ending in **visual.force.com**. Copy the URL.
11. Paste the URL you copied over the URL in the **Remote Site URL** field, then click **Save**.
12. Return to the tab with the Warnings message. Close the modal window and refresh the tab. The **Warnings** button is now gone.