

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.

Build Simple Integration Procedures

Requirements

“As a user, I'd like the OmniScript that allows me to update basic account details to be able to extract the data from Salesforce and save any updated data back into Salesforce.”

Build the Integration Procedure that extracts Account data from Salesforce into the Edit Account OmniScript, then build another Integration Procedure that allows you to save updated data from the OmniScript back to Salesforce.

Prerequisites

- None

Tasks

1. Build an Integration Procedure to Get Data for the Edit Account OmniScript
2. Build an Integration Procedure to Save Updated Data from the Edit Account OmniScript

Time

- 20 mins

Task 1: Build an Integration Procedure to Get Data for the Edit Account OmniScript

1. Create a new version of an existing Integration Procedure.
 - a. Open the **App Launcher**, then select the **OmniStudio** app.
 - b. From the dropdown, select **OmniStudio Integration Procedures**.
 - c. Type `team` into the search text box.
 - d. Open **team/getAccountDetails > Team Stub Get Account Details (Version 1)**.
 - e. Click **Create Version** to preserve the version with stub details.
 - f. Edit the name to remove **Stub**. The new name is **Team Get Account Details (Version 2)**.
 - g. Delete the Set Values element.
2. Link the Get Account Details Integration Procedure to the sampleGetAccountDetails DataRaptor.
 - a. Drag a **DataRaptor Turbo Action** component into the STRUCTURE panel, immediately below the **Procedure Configuration** element.
 - b. Fill in the fields as follows:

Property	Value
Element Name	DRGetAccountDetails
DataRaptor Interface	sampleGetAccountDetails

- c. In the **INPUT PARAMETERS** table, click + **Add Input Parameter** and fill in the fields as follows:

Property	Value	Notes
Data Source	AccountId	You may see suggestions for this value, but you must enter it yourself.
Filter Value	AccountId	

- d. Click **PREVIEW**.
- e. Click + **Add New Key/Value Pair** and enter the following:

Property	Value
Key	AccountId
Value	[Acme's AccountId]

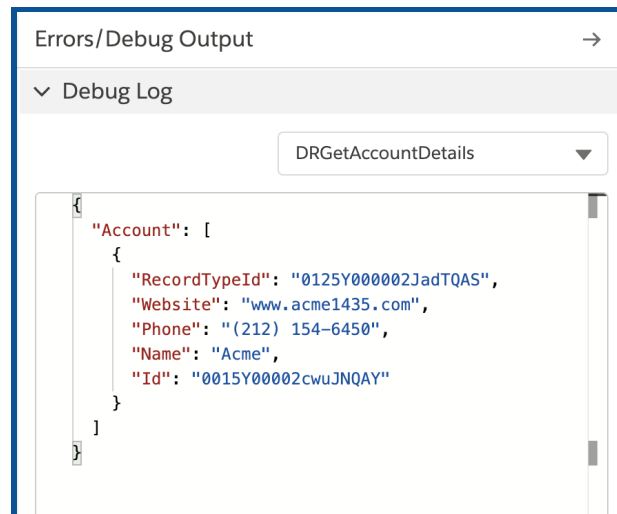


NOTE:

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

- f. Click **Execute**. (You need to scroll down to see the button).
- g. Under Debug Log, select **DRGetAccountDetails** from the dropdown and confirm you see Acme's information. The DataRaptor is now connected to the Integration Procedure.



NOTE:

In the Debug Log dropdown, **Original Input** is what you expect to pass to the Integration Procedure. **Debug Log** would allow you to work through and identify any issues with the output and the input for each element. In addition, there are two entries for each component. The first, NAME, displays the output. The second, NAMEDebug shows the input for the step. If you don't see expected outputs, you can review the debug entry to help find out what is wrong with the input data

3. Tell the Integration Procedure what data to send back to the Edit Account OmniScript.
 - a. Click **PROPERTIES**.
 - b. Click on the Response Action element **ResponseAction** in the STRUCTURE panel.
 - c. Under **SEND/RESPONSE TRANSFORMATIONS**, in the **Send JSON Path** field, replace **SetValues** with `DRGetAccountDetails`.

▼ SEND/RESPONSE TRANSFORMATIONS

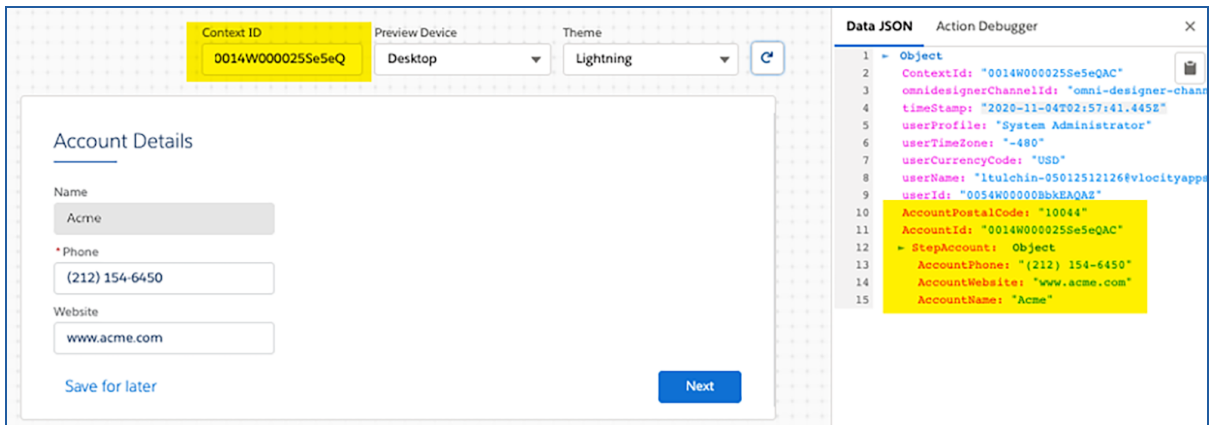
Send JSON Path ⓘ <input type="text" value="DRGetAccountDetails"/>	Send JSON Node ⓘ <input type="text"/>
Response JSON Path ⓘ <input type="text"/>	Response JSON Node ⓘ <input type="text"/>

- d. Click **PREVIEW > Execute**.
- e. Confirm the **Response** section displays Acme's Account information.

Input Parameters Edit as JSON	Response Browser: 2874ms ⓘ - Server: 2084ms ⓘ - Apex CPU: 205ms ⓘ						
<table><tr><th>Key</th><th>Value</th></tr><tr><td><input type="text" value="AccountId"/></td><td><input type="text" value="0015Y00002cwuJNQAY"/></td></tr><tr><td colspan="2">+ Add New Key/Value Pair</td></tr></table>	Key	Value	<input type="text" value="AccountId"/>	<input type="text" value="0015Y00002cwuJNQAY"/>	+ Add New Key/Value Pair		<pre>{ "Account": [{ "RecordTypeId": "0125Y000002JadTQAS", "Website": "www.acme1435.com", "Phone": "(212) 154-6450", "Name": "Acme", "Id": "0015Y00002cwuJNQAY" }] }</pre>
Key	Value						
<input type="text" value="AccountId"/>	<input type="text" value="0015Y00002cwuJNQAY"/>						
+ Add New Key/Value Pair							

- f. Click **PROPERTIES**.
 - g. Click **Procedure Configuration > Activate Version**.
4. Confirm the Get Account Details Integration Procedure is working in the Edit Account OmniScript.
- a. From the dropdown, select the **OmniScripts** tab.
 - b. Search for sample and select the **sample/editAccount Omniscrypt > Sample Edit Account (Version 1)**.
 - c. Click **IPGetAccountDetails** on the Canvas and edit the **Integration Procedure** field under the **Properties** tab to *team_getAccountDetails*.
 - d. Click **Preview** in the Header.

- e. Paste the **Acme Account Record Id** into the **Context ID** field and click **Refresh**.
- f. Confirm the account details for Acme populate in the preview screen and JSON.



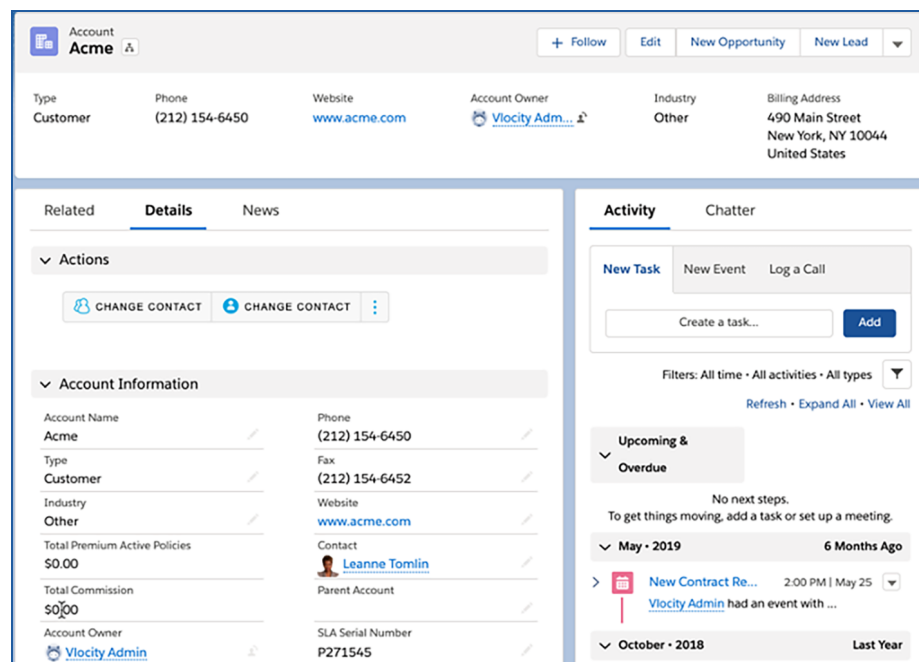
The screenshot displays the OmniStudio interface. On the left, the 'Account Details' form is visible, showing fields for Name (Acme), Phone ((212) 154-6450), and Website (www.acme.com). A 'Next' button is at the bottom right. Above the form, the 'Context ID' field is highlighted in yellow and contains the value '0014W000025Se5eQ'. To the right, the 'Data JSON' panel shows a JSON object with various fields. The 'StepAccount' object is highlighted in yellow, containing 'AccountPhone', 'AccountWebsite', and 'AccountName'.

```
1 = Object
2 ContextId: "0014W000025Se5eQAC"
3 omniDesignerChannelId: "omni-designer-channel"
4 timeStamp: "2020-11-04T02:57:41.445Z"
5 userProfile: "System Administrator"
6 userTimeZone: "-480"
7 userCurrencyCode: "USD"
8 userName: "ltulchin-050125121268vlocityapp"
9 userId: "0054W000000bKkEAQAE"
10 AccountPostalCode: "10044"
11 AccountId: "0014W000025Se5eQAC"
12 StepAccount: Object
13   AccountPhone: "(212) 154-6450"
14   AccountWebsite: "www.acme.com"
15   AccountName: "Acme"
```

Task 2: Build an Integration Procedure to Save Updated Data

1. Create a new version of an existing Integration Procedure.
 - a. From the dropdown, select **OmniStudio Integration Procedures**.
 - b. Search for `team` and open the **team/saveAccountDetails > Team Starter Save Account Details (Version 1)** Integration Procedure.
 - c. Create a new version.
 - d. Edit the name to remove **Starter** from the name. The new name is **Team Save Account Details**.
 - e. Drag a **DataRaptor Post Action** into the **STRUCTURE** panel (below **Procedure Configuration**).
 - f. In the **Element Name** field, enter `DRSaveAccountDetails`.
 - g. Click **DataRaptor Interface** and select **sampleSaveAccountDetails** from the dropdown.
 - h. Click **Procedure Configuration** and **Activate Version** to activate the Integration Procedure.
2. Confirm the active Integration Procedure is connected to your OmniScript.
 - a. Return to the **sample/editAccount>Sample Edit Account (Version 1) OmniScript** tab.
 - b. Click **IPSaveAccountDetails** on the Canvas and edit the **Integration Procedure** field under the **Properties** tab to `team_saveAccountDetails`.
 - c. Click **Preview** in the Header.
 - d. If needed, paste **Acme's RecordId** into the **Context ID** field.
 - e. Click **Refresh**.

- f. Edit either the website address or the phone number.
- g. Click **Next**.
- h. Click on the browser tab where Acme's information displays.
- i. Refresh the browser page (F5 or reload the page) and confirm the edit you made displays.



The screenshot displays the Salesforce Account page for 'Acme'. The top section includes a header with the account name 'Acme' and buttons for '+ Follow', 'Edit', 'New Opportunity', and 'New Lead'. Below this, a summary row shows key information: Type (Customer), Phone ((212) 154-6450), Website (www.acme.com), Account Owner (Vlocity Admin), Industry (Other), and Billing Address (490 Main Street, New York, NY 10044, United States).

The main content area is divided into two columns. The left column has tabs for 'Related', 'Details' (selected), and 'News'. Under 'Details', there are sections for 'Actions' (with 'CHANGE CONTACT' buttons) and 'Account Information' (a table of account details). The right column has tabs for 'Activity' (selected) and 'Chatter'. Under 'Activity', there are buttons for 'New Task', 'New Event', and 'Log a Call', followed by a 'Create a task...' input field and an 'Add' button. Below this, there are filters and a list of activities, including 'Upcoming & Overdue' and 'May 2019'.

Account Information	
Account Name	Acme
Type	Customer
Industry	Other
Total Premium Active Policies	\$0.00
Total Commission	\$0.00
Account Owner	Vlocity Admin
Phone	(212) 154-6450
Fax	(212) 154-6452
Website	www.acme.com
Contact	Leanne Tomlin
Parent Account	
SLA Serial Number	P271545

- 3. Activate the OmniScript.
 - a. Click **Activate Version**.
 - b. Click **Done**.

Review

Confirm your understanding by answering these questions.

1. What are naming conventions for DataRaptor actions?
2. What edits did you make to your existing Integration Procedure to pull live data from Salesforce and share it with your OmniScript?
3. Why did you preview the Integration Procedure?

Build Additional Integration Procedures

Solidify what you learned when you created the Integration Procedures for the Edit Account OmniScript. We've summarized the requirements; refer to the step-by-step instructions above if you get stuck.

Build an Integration Procedure to extract data from the Contact object, and build an Integration Procedure to save the updated Contact data back into Salesforce.

1. Version and edit the **Team Stub Get Contact Details** Integration Procedure to use the **sampleGetContactDetails** DataRaptor.
 - Use ContactId for the Input Parameters Data Source and Filter Value.
 - Update the Send JSON Path in the Response action.
 - To preview, locate the recordId for Leanne Tomlin's contact record.
 - Don't forget to activate the new version of the Integration Procedure.
 - Test the new version in the **sample/editContact** OmniScript. Make sure to replace the Integration Procedure in the Integration Procedure action element first.
2. Version and edit the **Team Starter Save Contact Details** Integration Procedure to use the **sampleSaveContactDetails** DataRaptor Load to save data from the **sample/editContact** OmniScript.
 - Test the Integration Procedure using the Edit Contact OmniScript Preview. Make sure to replace the Integration Procedure in the Integration Procedure action element first.

Build an Integration Procedure to extract data from the Cases object, and build an Integration Procedure to save the updated Cases data back into Salesforce.

1. Version and edit the **Team Stub Get Case Details** Integration Procedure to use the **sampleGetCaseDetails** DataRaptor.
 - Use CaseId for the Input Parameters Data Source and Filter Value.
 - Update the Send JSON Path in the Response action.
 - To preview, locate the recordId for case number 00001026.
 - Don't forget to activate the new version of the Integration Procedure.
 - Test the new version in the **sample/editCase** OmniScript. Make sure to replace the Integration Procedure in the Integration Procedure action element first.
2. Version and edit the **Team Starter Save Case Details** Integration Procedure to use the **sampleSaveCaseDetails** DataRaptor Load to save data from the **sample/editCase** OmniScript. Test the Integration Procedure using the Edit Cases OmniScript Preview. Make sure to replace the Integration Procedure in the Integration Procedure action element first.