Activate and Publish 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

Once FlexCards are built and activated, use the Lightning App Builder to arrange them on a record page to build a console.

Prerequisites

- Meet the Data Source Wizard
- Display Data and Actions on a FlexCard
- Style the Elements on a FlexCard
- Work with Child FlexCards
- Build a FlexCard with External Data
- Add FlexCard States and Conditions

Tasks

1. Activate and Embed the Weather FlexCard in the MasterAccount FlexCard
2. Add FlexCards to a Lightning Console

Time:

- 15 mins

What You Will Build

Task 1: Activate and Embed the Weather FlexCard in the MasterAccount FlexCard

1. **Activate** the **teamWeather** FlexCard.

   a. Open the **teamWeather (Version 2)** FlexCard from the **OmniStudio FlexCards** tab.

   b. Click **Activate**. You don't need to set Publish Options.

   c. Click **Done**.

2. Embed the teamWeather FlexCard in the Account FlexCard.

   a. Open the **teamMasterAccount** FlexCard from the **OmniStudio FlexCards** tab. If you did not complete the OmniStudio FlexCards Trailhead practice exercises, search for `sample` and then open **sampleAccountDetails (version 1)**.

   b. Refresh the page.

   c. Select the Weather block and go to the **Build** panel.

   d. Locate the **FlexCard** element and drag it to inside the Weather block.

   e. In the **Properties** panel, rename it to `Weather Details`.

   f. In the **FlexCard Name** field, select **teamWeather**.
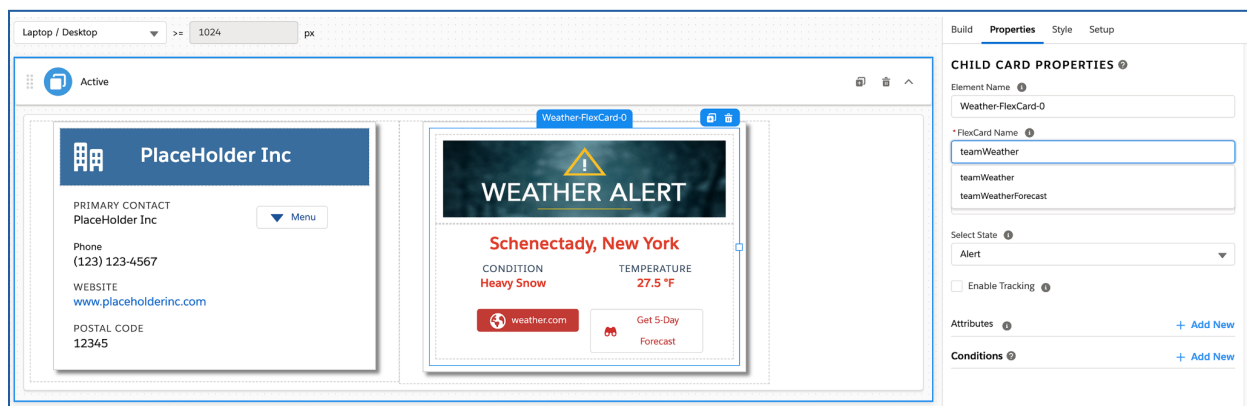
g. Notice the field **Select State**. Toggle this between the **Active** and **Alert** states to preview both and see what they look like.

h. Click the **Preview** button in the FlexCard header.
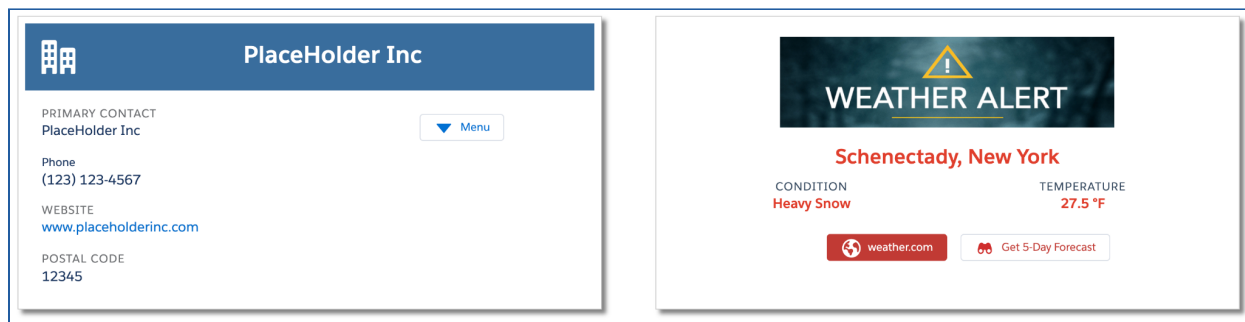
NOTE:
If you see this error in Preview mode: **This page has an error. You might just need to refresh it. [PromiseRejection: [object Object]]**, remove it by clicking **Add Test Params** and entering the Record Id for Acme. This is the FlexCard Designer's prompt to enter a Record Id in Preview. The error 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.

i. **Activate** the FlexCard.

j. Click **Publish Options** and make sure **RecordPage**, **AppPage**, and **HomePage** are selected. Click **Save**.

Task 2: Add FlexCards to a Lightning Console

1. Open the **teamAccount** Lightning App Console to edit it.

    a. In any browser tab open with your org, click **Setup**.

    b. In **Quick Find** enter `app build` in the field to locate and open the **Lightning App Builder**.

    c. Locate the record page titled **team Account**. Click **Edit**.

    This opens the page in the Lightning App Builder, where you make edits and save to publish.
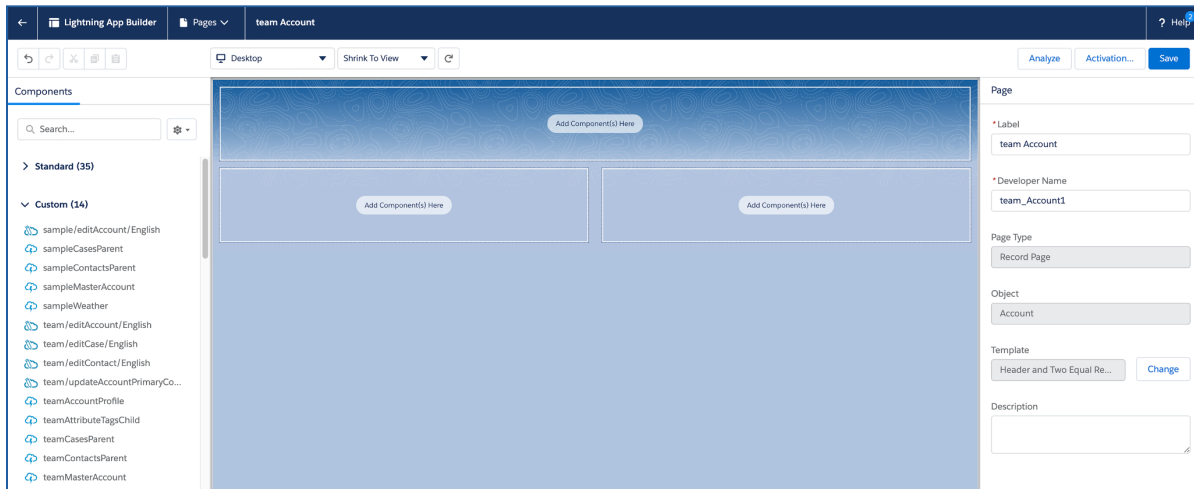
2. Configure the header region.

   To the left you see lists of lightning components – the **Standard** list which you minimized, **Custom** and **Custom - Managed**.

   The **Custom** components list is where you'll find the components you created as well as the components that make up the package. As long as your Lightning web components are active, they appear in the **Custom** list.

   a. From the **Custom** components list, locate and drag the **teamMasterAccount** or **sampleAccountDetails** component to the header region.
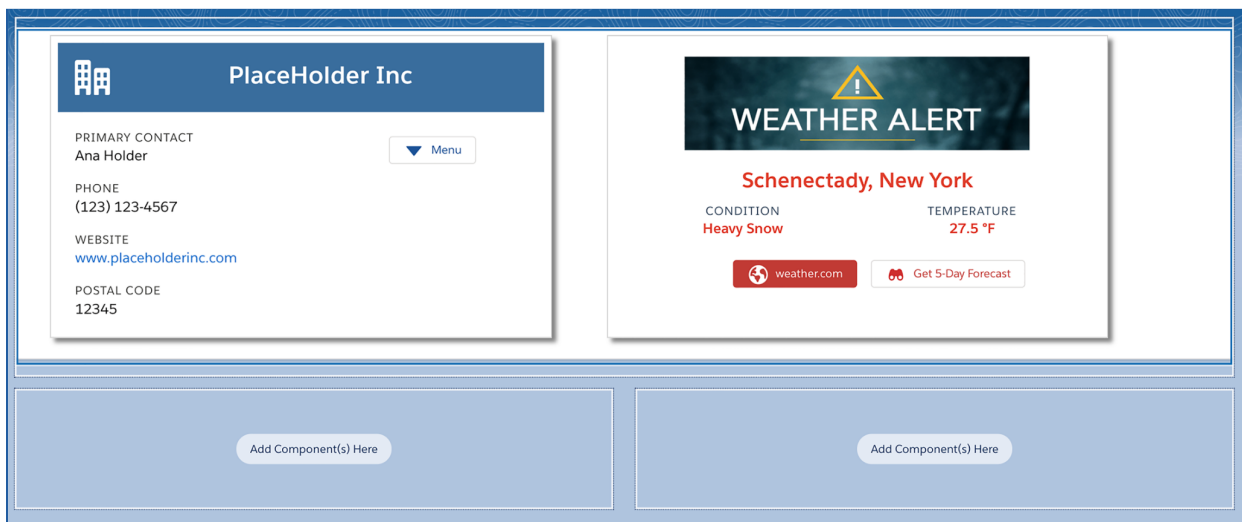
3. Configure the region on the left.

    a. From the **Custom** components list, locate and drag the **teamContactsParent** component to the left region.
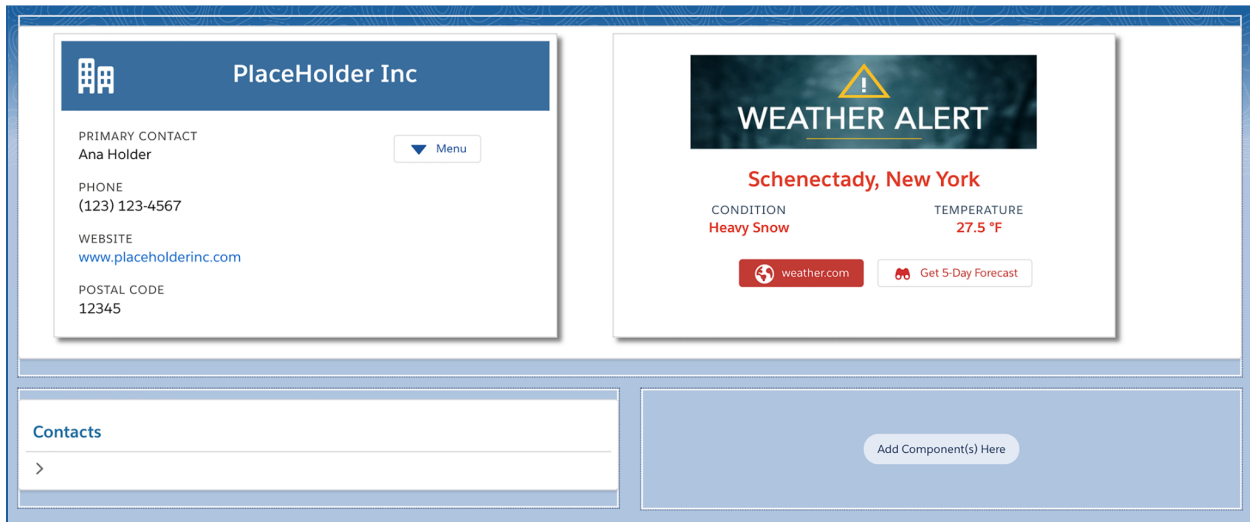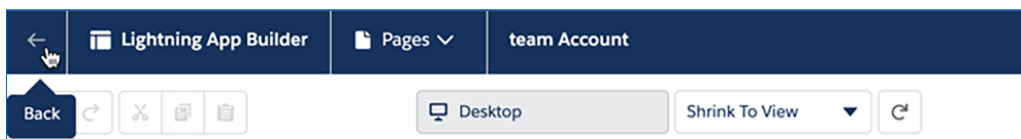

4. Configure the region on the right.

    a. From the **Custom** list of components, locate and drag the **teamCasesParent** component to the right region.
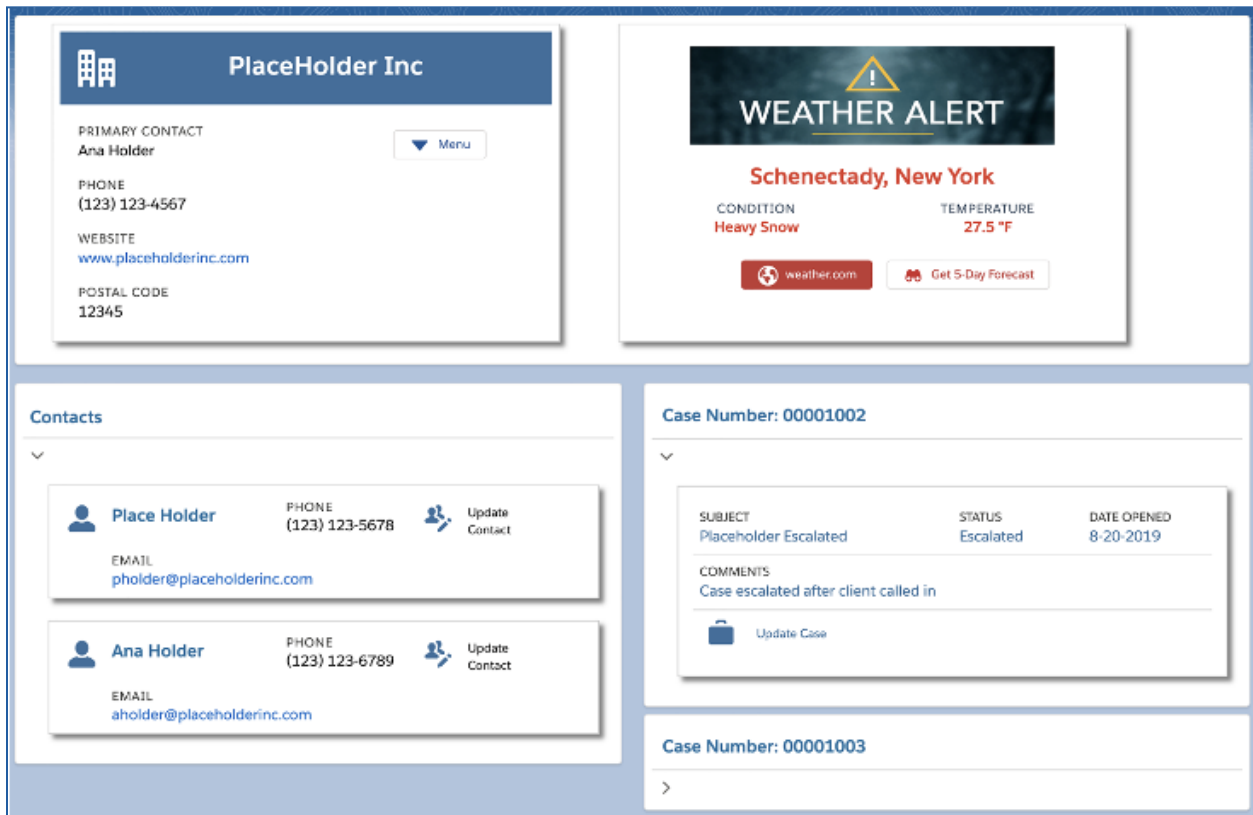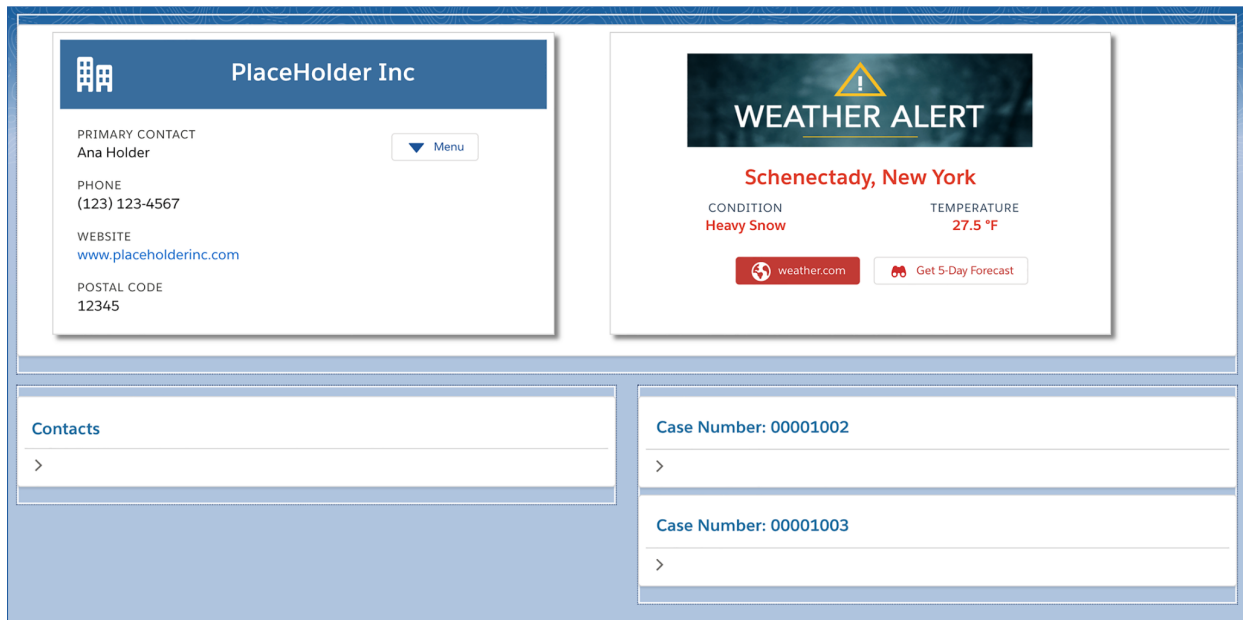
5. Save the page and test the new OmniStudio Console app.

   a. Click **Save**.

   b. Click the **Back** button, which is a left arrow.

   c. From the App Launcher, go to **OmniStudio Console**.

   d. Select **All Accounts** for the view, then select **Acme** and you see the page with your FlexCards. The record page you created is now the default page for any account.

   e. Expand the Contacts block and the first case block.

Review

Confirm your understanding by answering these questions.

1. What can you do in Publish Options?

2. What are two reasons why the UI will not let you delete a FlexCard?

3. Is a Lightning App part of Salesforce or the Vlocity package?