Build a FlexCard with External Data

> **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

"As a service agent, I'd like to view weather and weather forecast information for the account's location and see alerts of any hazardous weather conditions."

Create a FlexCard that displays the current weather using a data source outside of Salesforce. Then add a flyout action to display 5-day weather forecast data in a datatable.

Prerequisites

- None

Tasks

1. Configure the Data Source for the Weather Child FlexCard
2. Add and Style an Image Element
3. Create a Child FlexCard with a Datatable for Forecast Data
4. Configure the Flyout Action for the 5-Day Forecast

Time

- 25 mins

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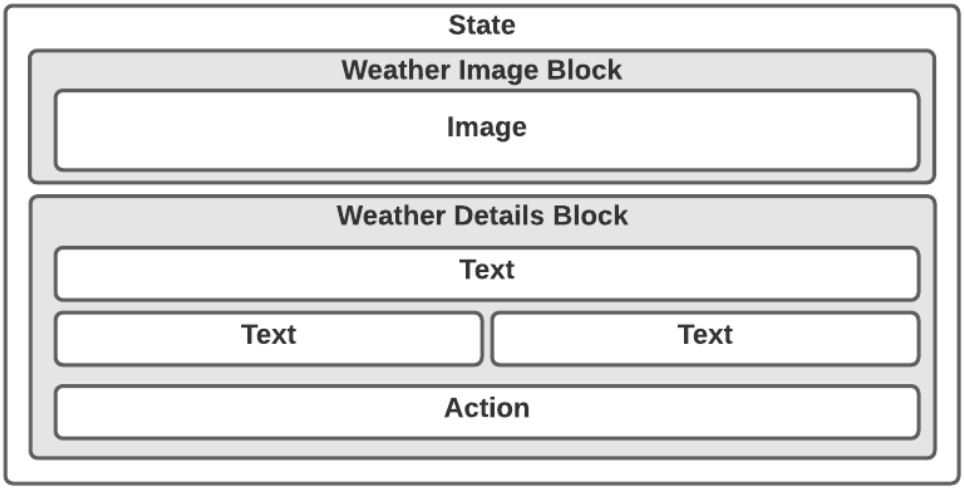
What You Will Build



Task 1: Configure the Data Source for the Weather Child FlexCard

1. Create a child FlexCard for the weather.
    a. In the **OmniStudio FlexCards** tab, type `team` in the Search bar.
    b. Locate **teamStarterWeather (version 1)** and open it. The data source, image, and flyout action have not been completed, but the elements have been styled already by the team.

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c. Clone the FlexCard.

d. Rename it to **teamWeather**. Click **Clone**.

2. Select and configure the data source.

   a. Go to the **Setup** panel and scroll to **DATA SOURCE**.

   b. Select **Integration Procedures** as the Data Source Type.

   c. In the **Name** field, select **team_getWeatherForecast**.

   d. Click **+ Add New** under **Input Map** (do this twice) and enter the following variables:

Key	Value
`Days`	`5`
`AccountId`	`{recordId}`

3. Confirm the stub forecast weather data is entering your JSON.

   a. Click the **Save & Fetch**. Go to the JSON tab.

   b. Confirm the data has two different nodes: A Forecast node with date, condition, Hi/Lo Temp in °F and °C, and a Current node with condition, City/State and Temp °F and °C.

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> **NOTE:**
>
> The FlexCard the team made is set to Fahrenheit. If you prefer using Celsius, select the **Temperature** field and change it in the **Properties** panel.

4. Trim the JSON node to only provide the current weather data to the card.

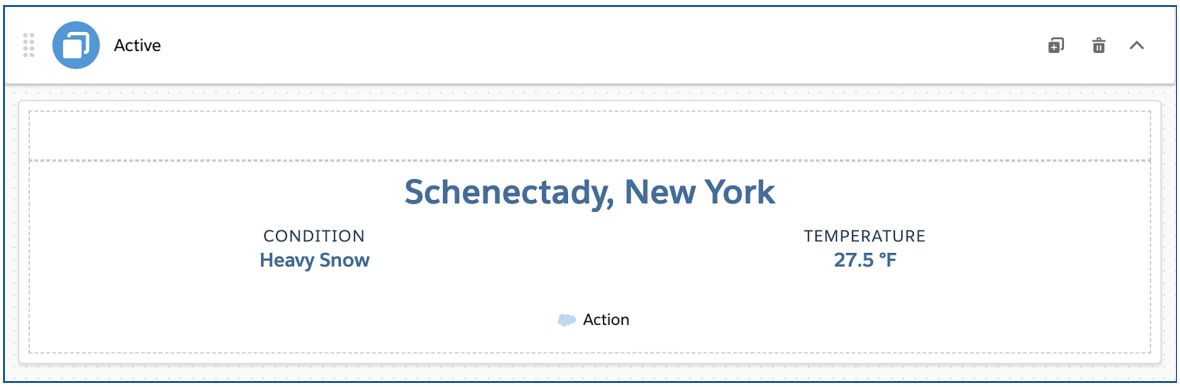
    a. Click **OK**.

    b. In the **Result JSON Path** field, select **["Current"]**.

    c. Click **Save & Fetch** again and verify you only see the Current node with the current weather stub data.

    d. Click **OK**.

    e. The fields on the canvas are now populated with the stub data.



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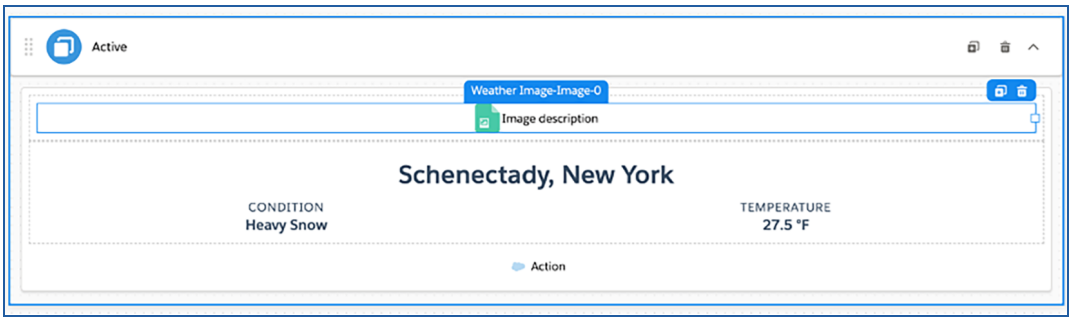
Task 2: Add and Style an Image Element

1. Add an **Image** element using a URL.

    a. Select the Weather Image block in the canvas. It's above the weather data you just populated.

    b. Go to the **Build** panel and drag an **Image** element to the Image block.



    c. While in the **Properties** panel, locate the **Image Source** field. Read the tooltip. Clicking the magnifying glass opens the Image Source window.

    You can upload an image, select an image from your org's libraries, or enter the URL of an image. Uploaded images are saved to your org's library of documents for reuse.

    d. Click the magnifying glass next to the **Image Source** field.

    e. Click in the field **Select an Image from Content Document**.

    f. Select **weatherbannerActive (Version:1)** from the list.

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g. Click **Save**.

h. Verify the image **Size** is **Large**.

i. **Preview**.

The remaining element in this FlexCard is for the flyout action. Leave this alone for now, you'll come back to it after you create the flyout FlexCard, which is next.

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.

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Review

Confirm your understanding by answering these questions.

1. What is a benefit of bringing in external data like the weather to your FlexCard?
2. How can you pull an image into a FlexCard for display?
3. What weather data are you bringing into your FlexCard?

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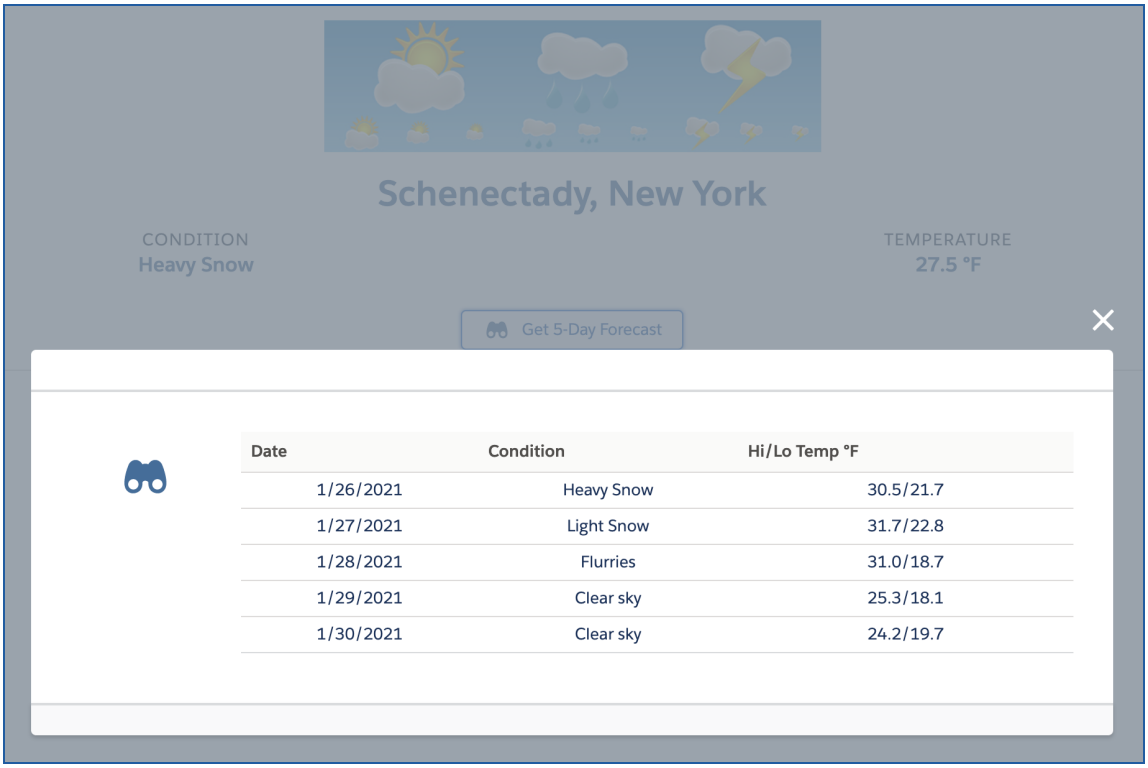
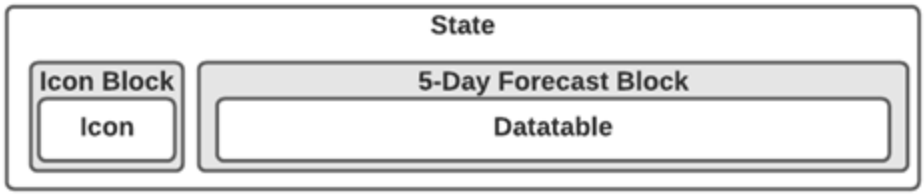
What You Will Build



Task 3: Create a Child FlexCard with a Datatable for Forecast Data

You'll now create the child FlexCard to enter in the Flyout field in the teamWeather FlexCard.



1. Create a new child FlexCard.
    a. In the **OmniStudio FlexCards** tab, click **New**.
    b. Name the FlexCard `teamWeatherForecast`

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c. Make it a child FlexCard using the toggle. Click **Next**.

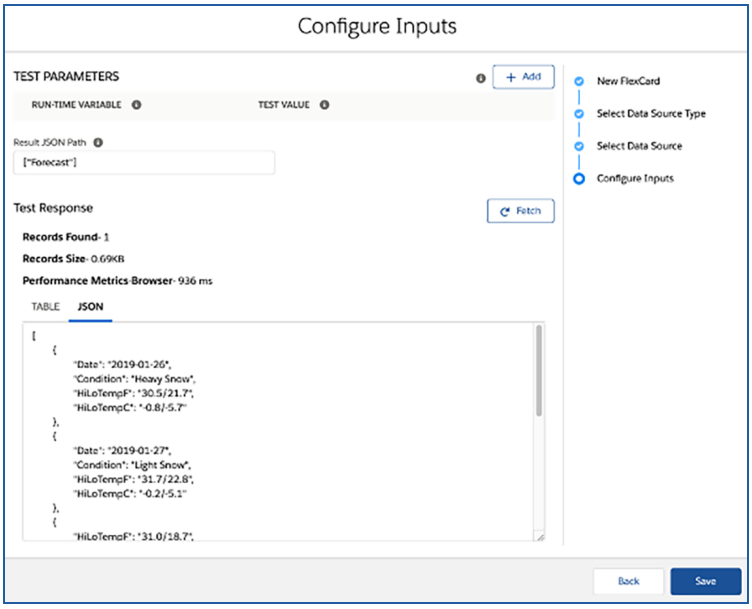
d. Select **Integration Procedures** and click **Next**.

e. Select **team_getWeatherForecast** as the Name.

f. Enter two input maps. Enter `Days` for the Key and `5` for the Value. The second one is `AccountId` for the Key and `{recordId}` for the Value. Click **Next**.

g. Click the **Fetch** button. Verify the stub data displays in the **JSON** tab under **Test Response**. You see two nodes: **“Forecast”** and **“Current”**.

h. To trim the data that’s returned to only the forecast, click in the **Result JSON Path** and select **[“Forecast”]**. Click **Save**.



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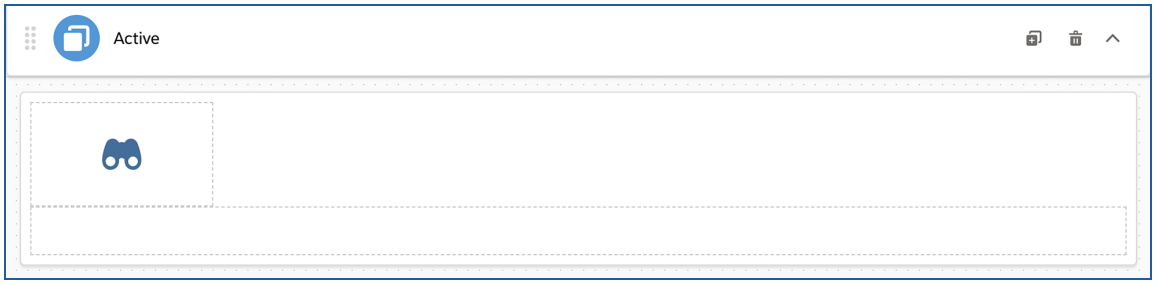
2. Add **Block** elements to the canvas for the icon and fields.
    a. Add two **Block** elements to the canvas.
    b. Name the top block `Icon` and the bottom block `5-Day Forecast`
3. Configure the **Icon** element.
    a. Select the **Icon** block.
    b. Go to the **Style** panel under **DIMENSIONS**. Adjust the element width to **2**.
    c. Add an **Icon** element to the block and configure the icon as follows:

Property	Value
Type	**Salesforce SVG**
Icon	`standard:forecasts`
Size	**Large**
Extra Class	Delete all text in this field
Variant	**Default**

4. Style the icon.
    a. Go to the **Styles** panel and locate the **ICON** section. Enter `#3A6D9D` in the **Icon Color** field.
    b. Scroll down to the **ALIGNMENT** section. Give the Icon **small** padding **around** it.
    c. Set the **Text Align** to **Center**.



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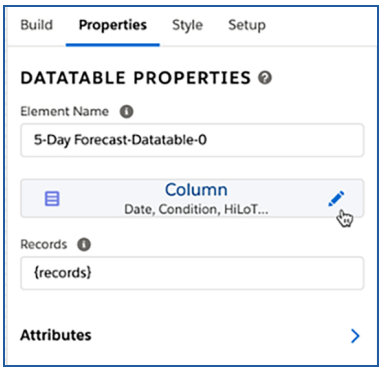
5. Add a **Datatable** element to display the 5-day forecast data.

    a. Select the **5-Day Forecast** block. In the **Style** panel, adjust the element width to **10**.

    b. In the **Build** panel drag a **Datatable** element inside the 5-Day Forecast block.

    c. Select the **Edit** icon to configure the table.



6. Configure the **Date** and **Hi/Lo Temperature** fields in the datatable.

    a. Change the **Type** of the date field to **Date**. This sets the format of the data to DD-MM-YYYY.

    b. Note there are two lines for different HiLoTemp fields: Celsius and Fahrenheit. Discard the field for the unit you **don't** want to use by clicking the trashcan / bin icon to the right of the line.

    c. Update the **Field Label** for the Hi/Lo Temp field to `Hi/Lo Temp °F` or `Hi/Lo Temp °C`. To display a degree symbol on a Mac, use **shift+option+8**. For a PC, use ASCII code 0176.

NOTE:

If the degree symbol doesn't display now or in future, try clearing the label field and typing it in again, or try inserting a space between the symbol and C/F, for example, Temp ° F.

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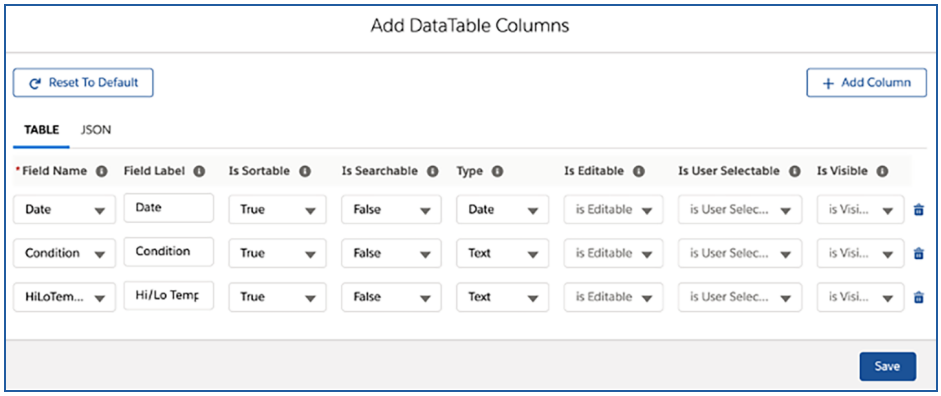

d. Click **Save**.

The datatable looks like the below when you finish. Don't worry that you can't see the data populated. The Design view doesn't show data in a table, but Preview does.

7. Bold the labels in the table header.

    a. Go to the **Style** panel and scroll to **DATATABLE**. Locate **Table Head**.

    b. Enter `bold` in the **Font Weight** field.

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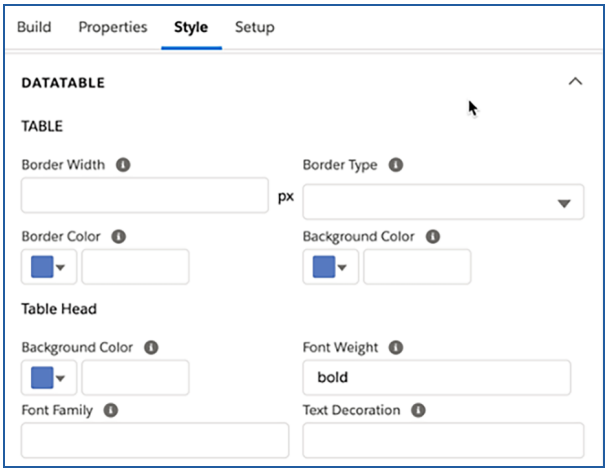

8. **Preview** the FlexCard. You see the table five times for the 5 days you entered in the Input Map. A new FlexCard has **Repeat Records** enabled by default.

   This means the data loops through records. When you want to display data that doesn't need to be looped through and displayed as a list, disable this feature. Datatables already loop over and list multiple records, so disable it.

9. Return to the **Design** mode and go to the **Setup** panel.

10. Expand **Repeat Options** and disable **Repeat Records**.

11. **Preview** again. You see just the one datatable now.

Date	Condition	Hi/Lo Temp °F
1/26/2021	Heavy Snow	30.5/21.7
1/27/2021	Light Snow	31.7/22.8
1/28/2021	Flurries	31.0/18.7
1/29/2021	Clear sky	25.3/18.1
1/30/2021	Clear sky	24.2/19.7

12. **Activate** it. There is no need to configure **Publish Options**, as this is a child FlexCard in the teamWeather flyout action.

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Task 4: Configure the Flyout Action for the 5-Day Forecast

1. Configure the flyout action.
    a. Return to the **teamWeather** FlexCard. Refresh it.
    b. Select the **Action** element and change the **Element Name** to `Forecast` in the **Properties** panel.
    c. For the **Action Type**, select **Flyout**.
    d. Change the **Label** from **Action** to `Get 5-Day Forecast`
    e. Set the **Icon** to `standard:forecasts`
    f. Verify the **Flyout Type** is **Child Card**.
    g. Locate the **Flyout** field. Select the FlexCard you just finished creating, **teamWeatherForecast**. If it isn't visible in the menu, refresh the page.
    h. Under **Attributes**, set the flyout to open in a **Modal**.
    i. Check **Display As Button** and select **Outline Brand** as the button style.
    j. Go to the **Style** panel. Locate the Color field for the Label. Enter `#3A6D9D` as the label color.
    k. Scroll to the Icon Color field. Enter `#3A6D9D` as the icon color.
2. Preview.
    a. **Preview** the FlexCard.
    b. Click the **Get 5-Day Forecast** button to view the forecast table. Verify all the fields are populating in the FlexCard.

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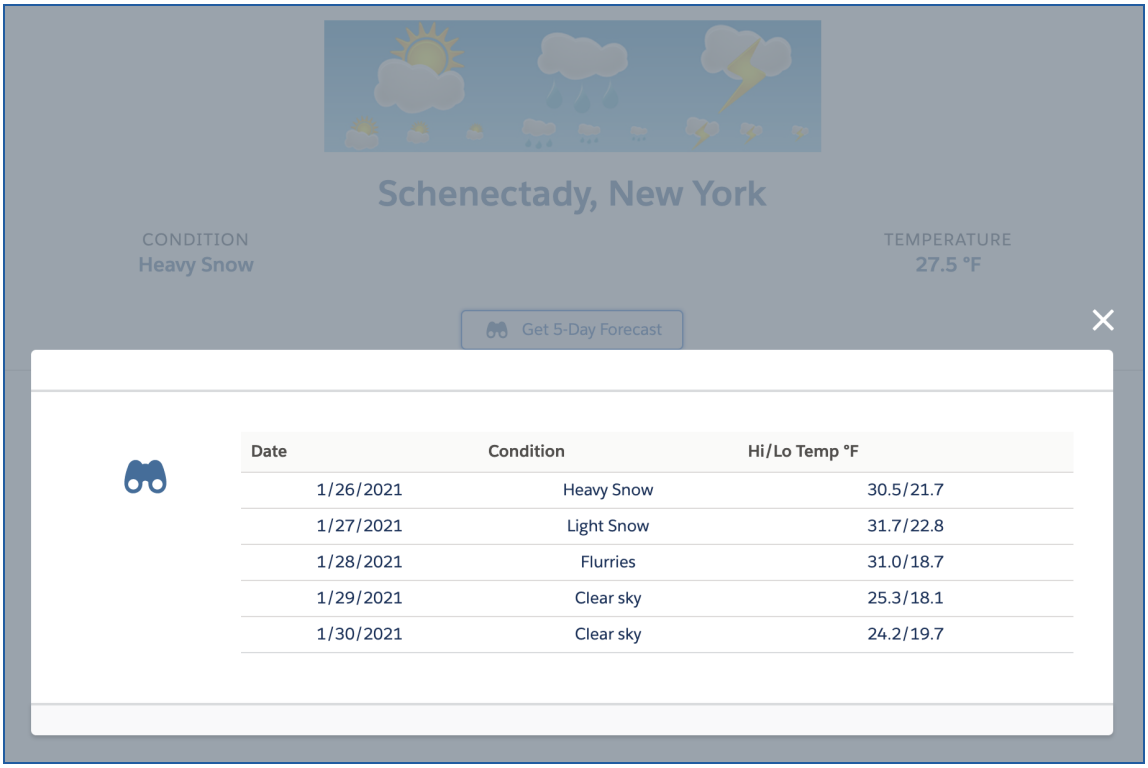

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Review

Confirm your understanding by answering these questions.

1. What is an advantage of using a datatable to display information?
2. What is a flyout and how might you use one?
3. How do you create a flyout?
4. Why might you not be able to view a flyout in a FlexCard?
5. Can you embed a child FlexCard in another child FlexCard?
6. What is the **Repeat Records** feature and why must it be disabled for a datatable?

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