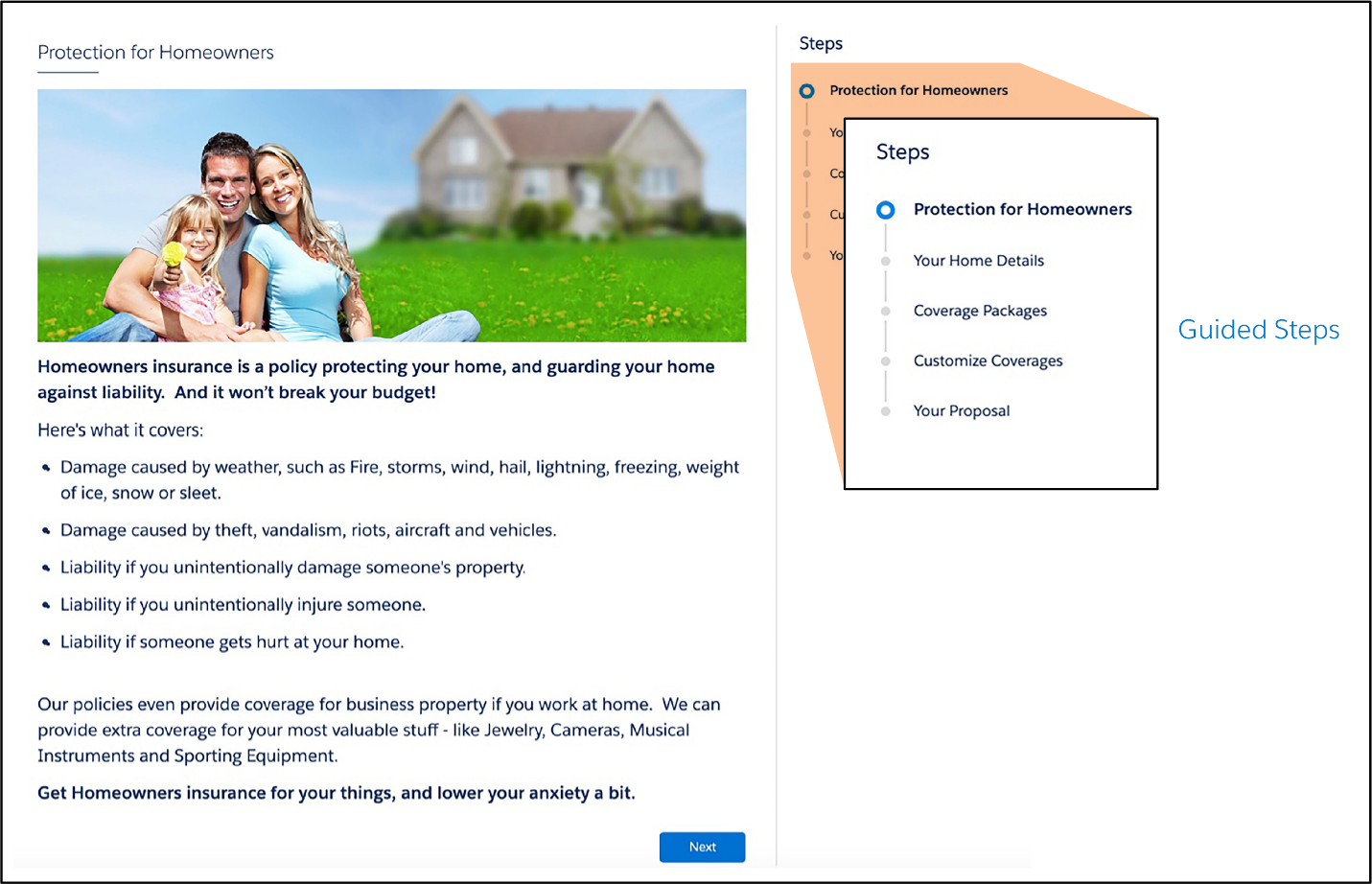
**The Lowdown on OmniScripts**

An OmniScript gives customers a guided path for completing a business process and serves as a configurable way of creating a seamless customer experience (which is *always* a good thing). In the following image, you see an OmniScript walking a customer through several steps to select an insurance policy. First they provide home details, then they select standard coverage packages. They are then prompted to select customizations for the packages. After all of this, they view their proposal for coverage. If they accept the proposal, they can complete the transaction and activate their coverage.



Here are a few other instances of when you might use OmniScripts.

* A customer service agent adds a new customer and captures details for a service implementation, such as network configuration requirements.
* A customer steps through a selling process, such as choosing a new insurance plan.
* An insurance agent updates a policy.
* A customer completes a self-service interaction such as troubleshooting a service outage.
* A customer completes forms for different services, such as government benefits, insurance policies, and healthcare coverage.

With an OmniScript, you configure interactive business processes that are easy to use, yet have complex functionality occurring behind the scenes. OmniScripts also have built-in branching capability, which means they show different pages and groups of fields based on choices the user makes. For the customer, this translates into a dynamic and personalized experience.

## Key Capabilities

**Build OmniScripts Quickly with Drag and Drop and Low to No Code**

OmniScript is a declarative scripting tool you create with clicks, not code. Using the OmniScript Designer, you drag and drop items to build the structure of the OmniScript, then preview and debug your work using the built-in troubleshooting tools.

this means you can quickly create and easily maintain OmniScripts, which saves lots of time.

**Use OmniScripts on Any Device and Any Channel**

OmniScripts are not restricted to OmniStudio Interaction Consoles for agents to use. You can deploy them on any device and any channel, such as a mobile device, or a consumer portal. Here’s what an OmniScript looks like when viewed on a mobile device and online.

Being able to view the same OmniScript on multiple channels without having to change the configuration is another time-saver!

**OmniScripts Have Modular Architecture**

An OmniScript’s look and feel (frontend) is separated from its functionality (backend). OmniScripts separate the JavaScript Object Notation (JSON) metadata structure (1), the stylesheets (2), and the data (3) from each other.

This modular architecture supports prototyping and building the user experience quickly. It also promotes using data from anywhere, reuse of JSON metadata, and ease in applying branding standards.

**Display Data from Multiple Data Sources**

An OmniScript can display both internal data from Salesforce and external data from a website or a third-party legacy system.

OmniScript’s data-oriented Actions elements call application programming interfaces (APIs), OmniStudio Integration Procedures, and other tools to access data from anywhere. You integrate data from multiple sources (Salesforce or third-party), manipulate the data, and send it back to its source, all from within the OmniScript. The data is captured in the standard JSON format.

Client-side execution improves performance and reduces API calls.

**Rebrand OmniScripts to Suit Your Customers**

You can control both the style and appearance of OmniScripts. You change the appearance of an OmniScript two ways. First, by using custom Lightning stylesheets to determine whether the guided interaction has a horizontal or vertical mode, branding, or any other aspects you wish to see. Second, by using the Newport Design System (NDS). NDS includes a complete set of customizable, global styles and is a Cascading Style Sheets (CSS) framework. It lets designers and web developers easily restyle all of their OmniStudio components in a single place and generate a custom, optimized CSS file that can be used in all future pages. It can even be used for non-OmniStudio and non-Salesforce pages.

**Manage Signed Documents with OmniScripts**

You can create dynamic documents from templates (MS Word, PDF, and HTML outputs), merge data from any data source (for example, Salesforce objects, or user inputs such as sales quotes, order forms, and contracts), and then create and operate on these documents within OmniScripts. You attach them to Salesforce records and email them to recipients, plus delegate to DocuSign for eSignatures. The signed document received from DocuSign is automatically attached back to the latest version of a contract.

## Get a Little Guidance from OmniScripts

OmniScript guided interactions do exactly what their name suggests: They guide users through sales and service processes, enabling them to quickly and easily achieve their goals. These interactions are dynamic, agile, scalable—and often personalized—creating customer experiences that are engaging and efficient.

**Build an OmniScript with Clicks, Not Code**

The OmniScript Designer lets you create the structure of an OmniScript using “clicks, not code.” It has a drag-and-drop interface with what-you-see-is-what-you-get (WYSIWYG) editing.

With it, you can:

* Preview elements inside steps.
* View property changes live.
* Access contextual guidance with in-product help.

More specifically, as you build the OmniScript, you’re able to:

* Add actions that extract or save data or send an email.
* Add input fields to enter data such as a user’s name, address, and other information.
* Configure calculations and messages that provide immediate feedback and error checking to the user.
* Create a function, such as a formula for performing a calculation within the OmniScript.
* Create branches that dynamically adjust the controls and enable or disable steps depending on choices the user makes in the guided process.
* Group items together by creating a step or displaying a list of items for the customer to select from.
* Refine the display by using a headline or text block.

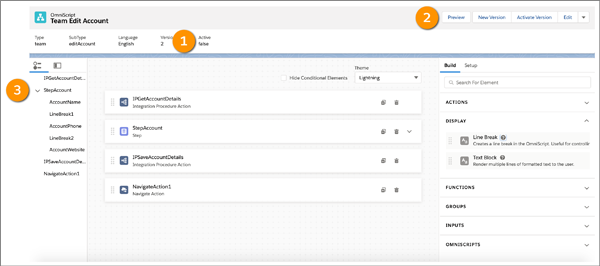
**The Designer’s Fantastic (and Fast) Features**

With OmniScript Designer’s features, you can:

* Build your OmniScripts on a wide and adjustable canvas, and instantly view changes made to element properties.
* Search for and drag elements onto the canvas from the Build panel.
* Reposition, clone, and adjust the width of elements with a 12-column snap-to-grid.
* Configure elements from the Properties panel.
* Configure script-wide settings from the Setup panel.
* Access inactive elements and navigate between them in high-level and detailed views from the navigation panel.
* Preview, test, and debug your script in Preview.
* View contextual in-product help to discover and learn about elements and properties without leaving your script.

Let’s take a closer look at the OmniScript Designer.

**Header and Navigation Panel**

In the header (1), you:

* Perform actions related to your script using the navigation bar.
* View high-level metadata about your OmniScript, such as Type, SubType, Version, Language, and Activation status.

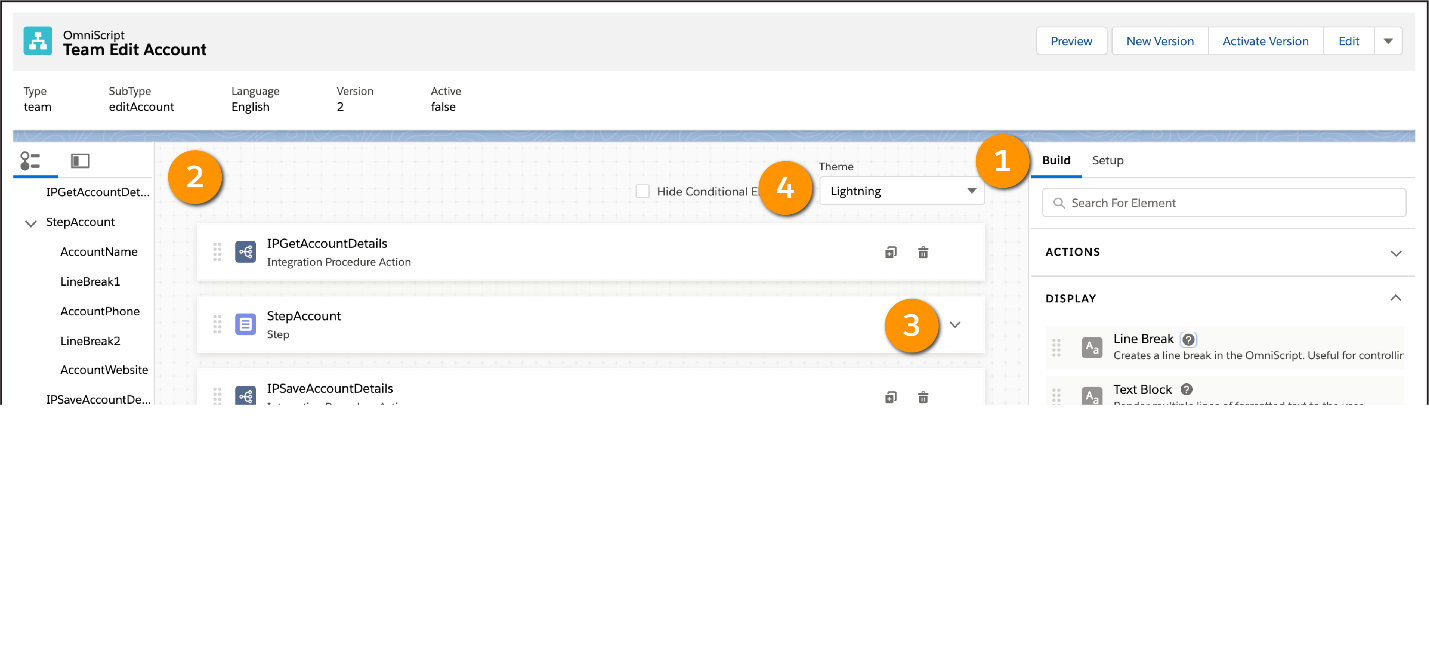
In the actions navigation bar (2) in the header, you:

* Toggle between Design and Preview views.
* Create a New Version, and Activate or Deactivate the current Version.
* Edit basic settings.
* Download your OmniScript.
* Get launch instructions.

In the navigation panel (3), you:

* Access and navigate between active and inactive actions, steps, and step elements.
* Use the Slide View tab for a high-level view of the structure of large and complex scripts. Click on a slide to open the Properties panel for a step or action.
* Use the Tree View tab for a detailed view of the script's structure. Click a branch to open the Properties panel for a step, element, or action. Use the Tree View to access inactive steps or elements.

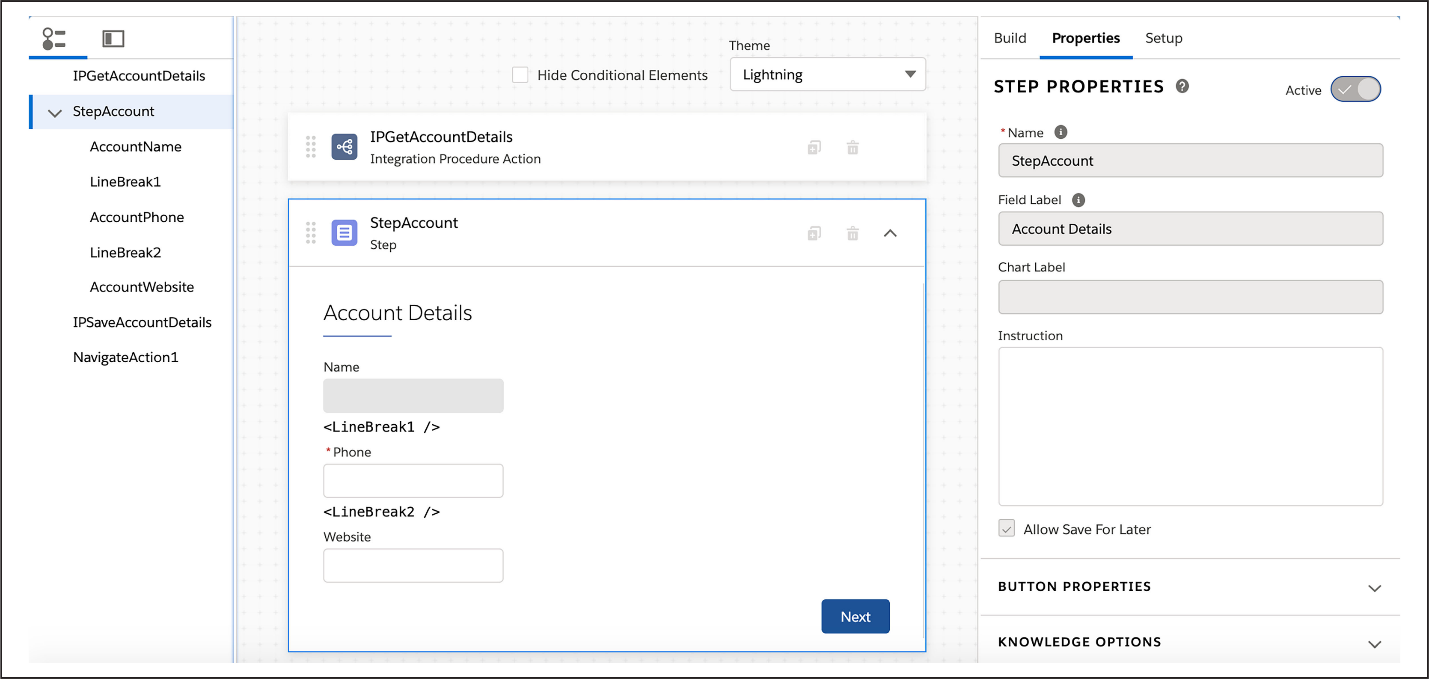
**Canvas and Build Panel**

Build your scripts by dragging elements from the Build panel (1) onto the canvas (2).

* Rearrange, clone, and delete elements as needed.
* Adjust the width of the canvas from either side.
* Expand steps (3) to preview and configure elements within them. Adjust the width of elements on a 12-column grid, and drag elements next to each other so that they automatically take up the remaining width of the grid.
* See how your scripts look with a Newport or Lightning theme (4) without switching to Preview.

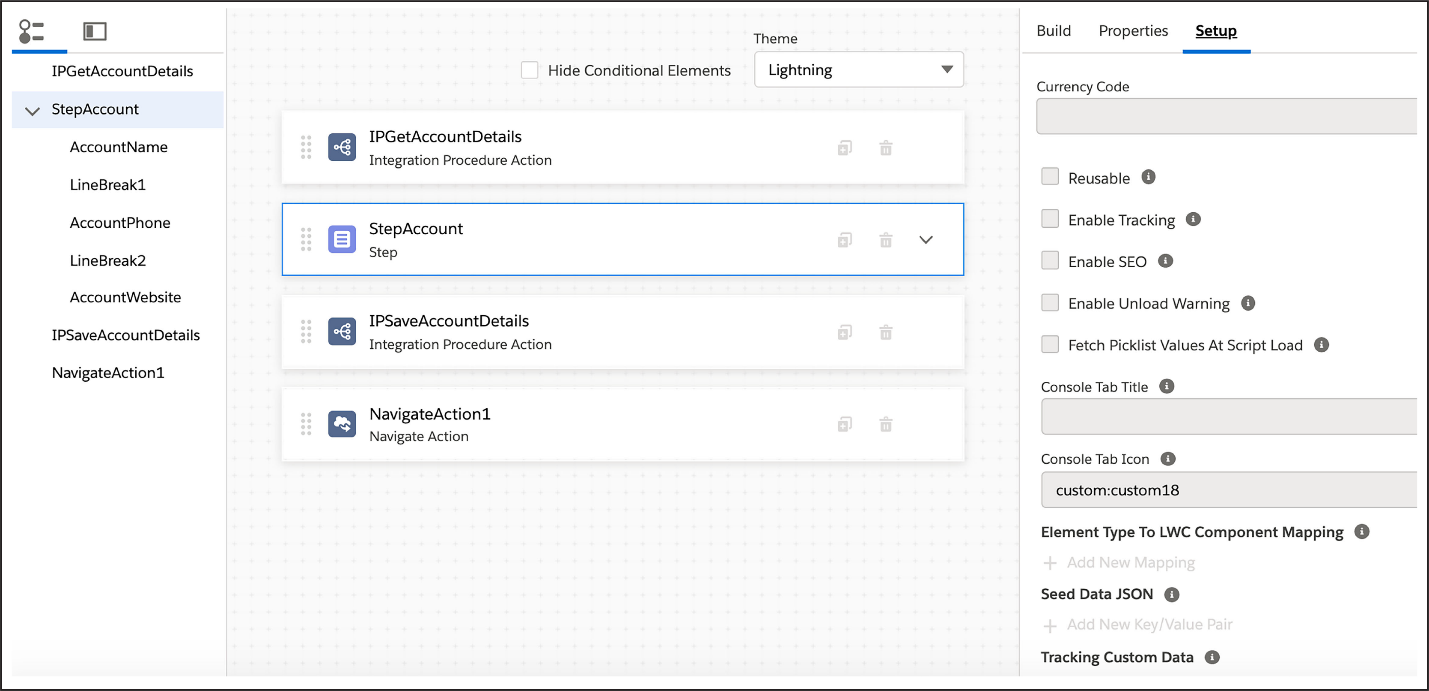
**Properties Panel**

Configure properties for action, display, function, group, input, and embeddable OmniScript elements in the user interface (UI), or edit properties as JavaScript Object Notation (JSON).



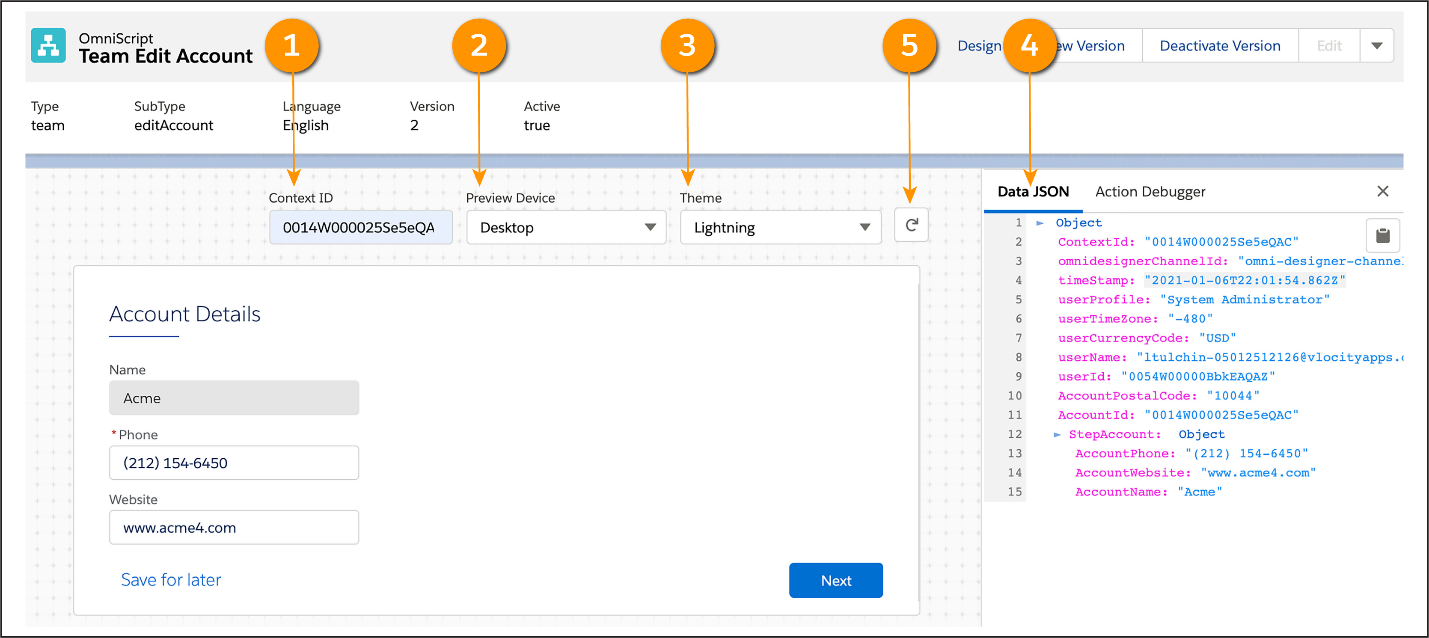
**Setup Panel**

Configure optional script-wide settings in the Setup panel.



Configure basic settings: Step Chart Options, Save Options, Knowledge Options, Error Messages, Messaging Framework, and Lightning Design System Tokens in the UI, or edit properties as JSON.

**Preview Options**

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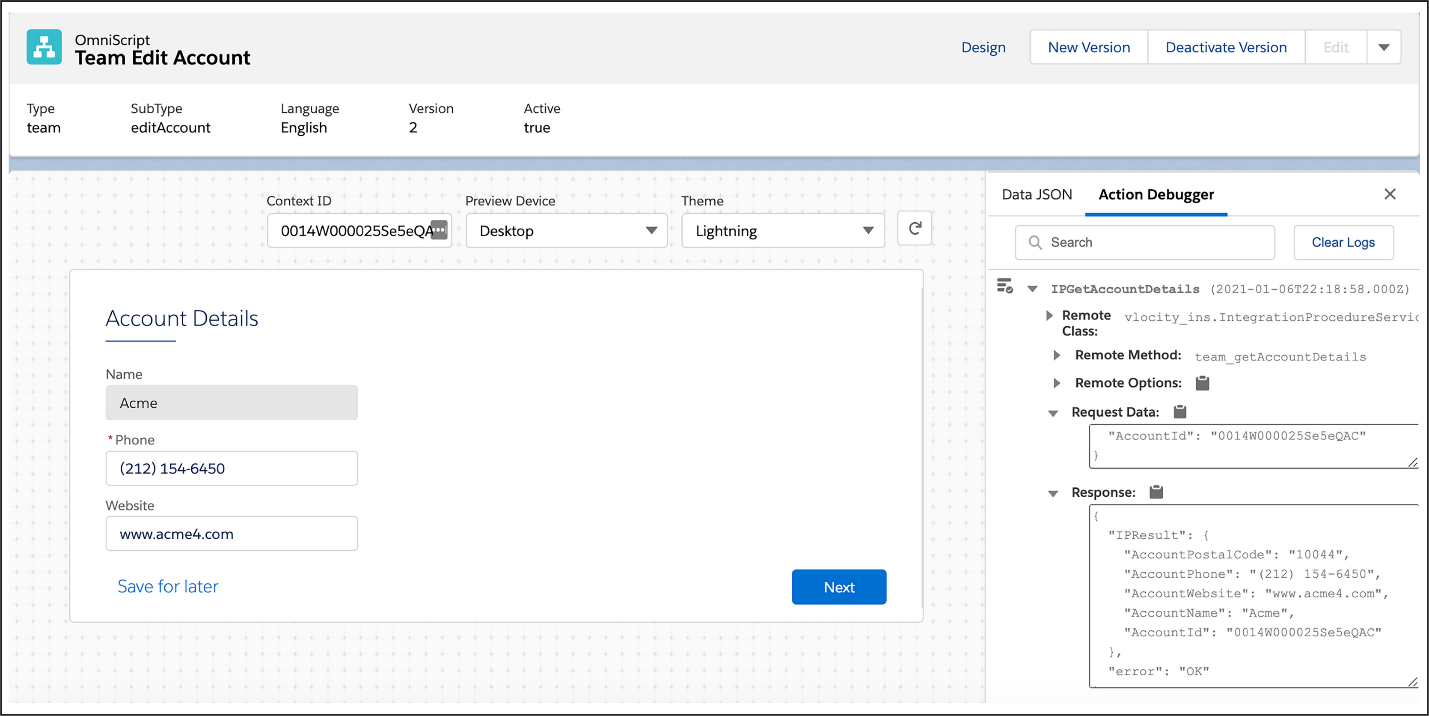
* Preview your script in real-time by entering a RecordId into the Context ID field (1) and refreshing to preview your form with live data. (If you are using stub data, test data will preview automatically.)
* Preview how an OmniScript appears on different devices, such as mobile, desktop, and tablet, with the Preview Device dropdown (2).
* With the Theme dropdown (3), see how your OmniScript looks with a Lightning or Newport theme. If a custom Newport stylesheet is in the org, it overrides the out-of-the-box Newport stylesheet.

**Data JSON**

* The Data JSON (4) provides an easy-to-read JSON format, which updates when you enter values in data fields on the canvas. Copy the entire JSON with just one click if needed.
* Reset Data (5) to reload the canvas and update the Data JSON and the Action Debugger.

**Action Debugger**

The Action Debugger lets you debug action requests and response data. Search for actions, copy specific nodes in one click, and clear the logs.



**In-Product Help**

In the Build, Properties, and Setup panels, use the in-product help feature to view contextual information and instruction about elements and properties without leaving your script.

* Access in-line information about properties with tooltips.
* View detailed documentation about element functionality with slide-out help panels.

