Omnistudio Installation and Upgrade

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CONTENTS

Omnistudio Installation and Upgrade

Install or upgrade Omnistudio in your org with the Omnistudio Foundation package. Your tasks include pre-requisite steps, package installation, and post-install or post-upgrade tasks. If your org isn't automatically updated or if you need to install Omnistudio, download the package with a unique link for each release.

Before you install Omnistudio for the first time, complete the steps in Prepare to Install the Omnistudio Package.

When you're ready to install or upgrade the Omnistudio package, find the package download for the current release in Omnistudio Releases.

Note Salesforce delivers new features three times per year (during the seasonal releases: Spring, Summer, and Winter) via automatic upgrades. After you install Omnistudio Spring '24 or later, your org receives future upgrades automatically, both major and patch releases. If your production and sandbox orgs are on Winter '24 when Spring '24 releases, those orgs automatically upgrade to Spring '24.

Prepare to Install the Omnistudio Package

Before you can install an Omnistudio package into an org that doesn't already have an Omnistudio package, you must prepare your browser and your Salesforce org. If you're upgrading Omnistudio, you can skip this task.

Install or Upgrade the Omnistudio Package

Omnistudio is in a managed package that you install into a Salesforce org. If your org isn't automatically upgraded, use these procedures to upgrade Omnistudio.

Omnistudio Permission Sets

Grant permissions to administrators to create and manage Omnistudio objects, such as Flexcards, Omniscripts, Integration Procedures, and Omnistudio Data Mappers. Grant consumers permission to view only Omniscript objects.

Omnistudio Settings

Enable settings applicable to the entire Omnistudio product suite from the Omnistudio Settings page in your org's Setup. For example, enable Omnistudio metadata API support from the **Omnistudio Metadata** setting.

OmniStudio-First Side-by-Side Package Installation Results

If both OmniStudio Standard and Salesforce Industries packages are installed in that order, both OmniStudio Standard and OmniStudio for Vlocity features are accessible, with a few exceptions.

Prepare to Install the Omnistudio Package

Before you can install an Omnistudio package into an org that doesn't already have an Omnistudio package, you must prepare your browser and your Salesforce org. If you're upgrading Omnistudio, you can skip this task.

Note Salesforce delivers new features three times per year (during the seasonal releases: Spring, Summer, and Winter) via automatic upgrades. After you install Omnistudio Winter ‘24, your org receives future upgrades automatically, both major and patch releases. If your production and sandbox orgs are on Spring '23 or Summer '23 when Winter '24 releases (October 6, 2023), those orgs automatically upgrade to Winter '24. Use the upgrade procedures and download the Omnistudio packages if your org isn’t automatically upgraded to Winter '24.

Note Starting from Summer '25, if you enable the Omnistudio license that is bundled with Salesforce Industries licenses, the Omnistudio standard designer and standard runtime are available by default. Don’t install the Omnistudio package.

1. Verify that your web browser and Salesforce version meet at least these minimum requirements.
   a. Ensure that your browser works with Omnistudio.

      Omnistudio uses the same browser requirements as Salesforce, for both Salesforce Classic and Lightning Experience. (More information)

      For best results, don't use Microsoft Internet Explorer.

   b. Your system has a minimum of 4 GB of RAM.
   c. Your browser has JavaScript enabled.
   d. Your Salesforce Edition is **Enterprise**, **Unlimited**, or **Performance**.
      See Find Your Edition.
   e. You have the Omnistudio permission set license and optional licenses for Omnistudio Document Generation.
      See Omnistudio Permission Sets.
   f. You have a valid subscription to Salesforce Customer Community, Salesforce Customer Community Plus, or Salesforce Partner Community.
      Depending on your cloud, a subscription might be included in the license.
2. Make sure the admin user has your email.

   Changing the **Alias** or **Nickname** is optional.

   a. From Setup, in the **Quick Find** box, enter `Users`, then click **Users**.
   b. Click the name of the user with the System Administrator profile.
   c. Look at the **Email** setting. If it's your email, skip to step 3.
   d. If the email isn't yours, click **Users** to go back to the list.
   e. Click **New User**.

f. Enter your **First Name**, **Last Name**, and **Email**.
g. Set the **User License** to **Salesforce**.
h. Set the **Profile** to **System Administrator**.
i. Check the **Salesforce CRM Content User** box.
j. Click **Save**.
k. When you receive the Welcome to Salesforce email, click **Verify Account** and set your password.
l. Log out, then log back in as the admin user you created.

3. Verify these settings are enabled in Setup.
   If they're not, enable them and save.
   - Verify Enable Orders
   - Salesforce CRM
   - Enhanced Email is automatically enabled in most organizations. Enabling the Enhanced Email setting makes the EmailMessage object available. Omnistudio tests a file that uses the EmailMessage object.
   - Deliverability set to All email. In the **Access to Send Email** section, use the **Access Level** dropdown menu to select **All email**.

What's next: Install or Upgrade the Omnistudio Package.

See Also
Set Up Enhanced Email
Considerations for Using Enhanced Email

Install or Upgrade the Omnistudio Package

Omnistudio is in a managed package that you install into a Salesforce org. If your org isn't automatically upgraded, use these procedures to upgrade Omnistudio.

Note Salesforce delivers new features three times per year (during the seasonal releases: Spring, Summer, and Winter) via automatic upgrades. After you install Omnistudio Spring '24, your org receives future upgrades automatically, both major and patch releases. If your production and sandbox orgs are on Winter '24 when Spring '24 releases, those orgs automatically upgrade to Spring '24.

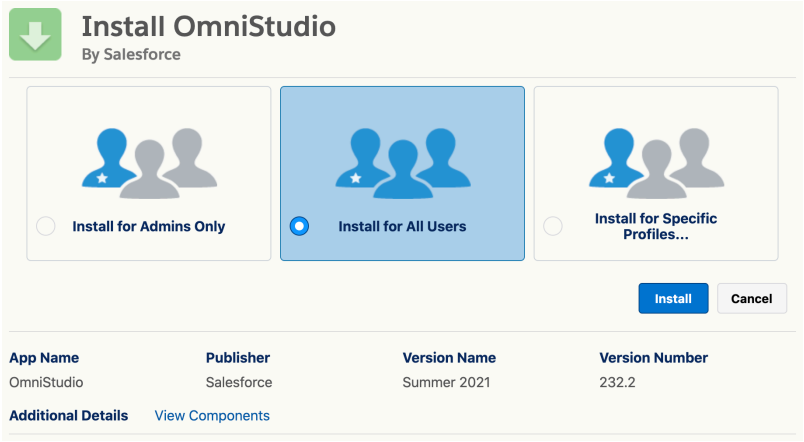
Important Don't install the Insurance or CME managed package if the Omnistudio Foundation managed package is already installed. Having both packages installed results in duplicate components. If your org already has the Omnistudio package installed and you want to install Insurance, Communications, Media, or Energy, contact Salesforce support.

1. If you're installing Omnistudio for the first time, complete the Prepare to Install the Omnistudio Package task. If you're upgrading Omnistudio, skip this step.
2. Log off from all Salesforce orgs.
3. To install the latest Omnistudio managed package, go to Omnistudio Managed Package Releases and click the installation URL. For installation links to versions older than the current release, contact

Salesforce Customer Support.

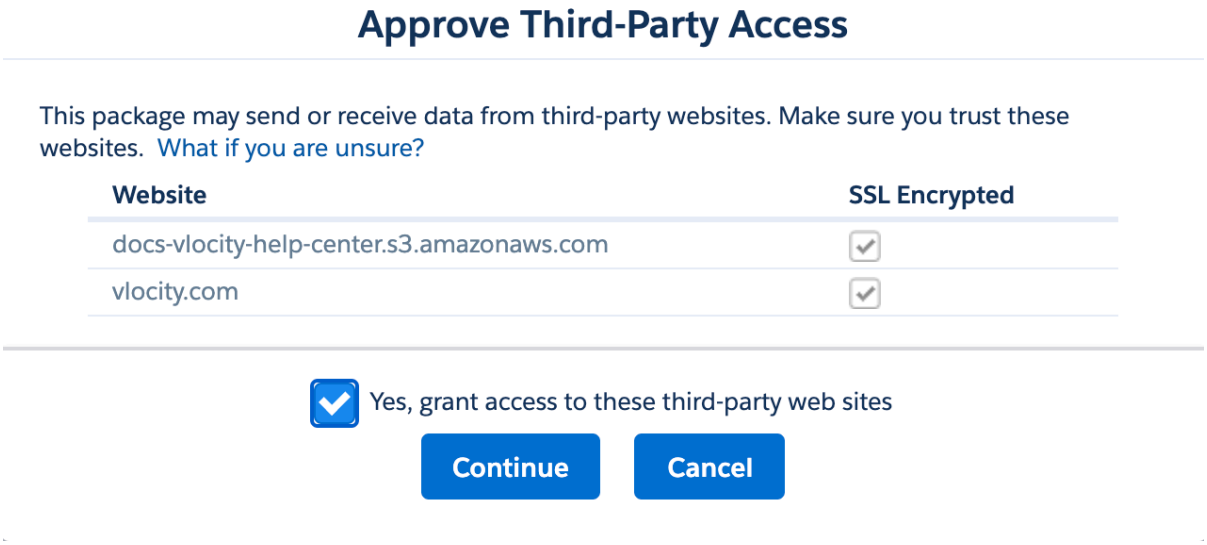
Tip To be extra cautious, do the upgrade in an incognito browser window.

4. Log in to the org you're installing Omnistudio into.
5. Select which users get Omnistudio access, then click **Install**.



If you see a warning and a checkbox, check the box and then click **Install** or **Upgrade**.

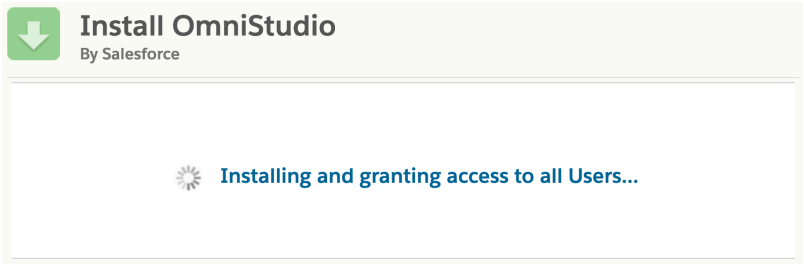
6. On the Approve Third-Party Access window, make sure that both options are selected.



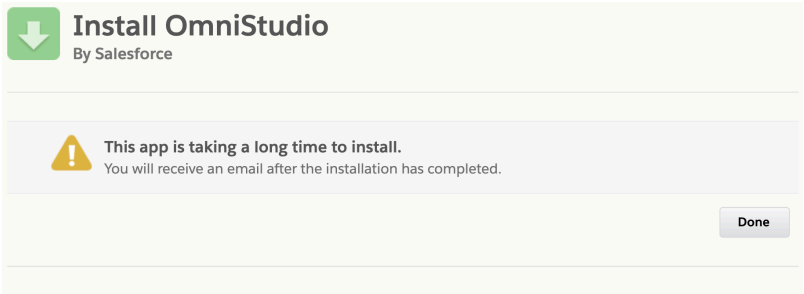
Both websites are safe and trusted sites. Access to these sites is required for the Omnistudio managed package to install.

Note If this window doesn't appear, these options are already selected.

7. Select **Yes, grant access to these third-party web sites**, then click **Continue**.



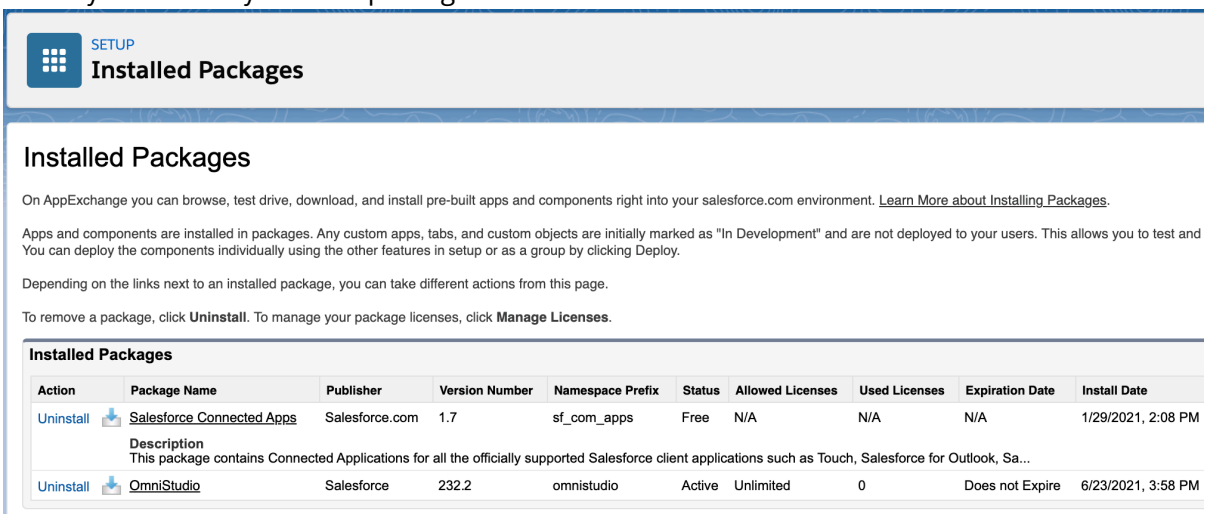
The managed package can take longer to install than the standard Salesforce timeout allows.



8. Wait for the Install Successful email.

   Important It's safe to go to the Installed Packages page in Setup and refresh occasionally until the managed package appears. However, don't start installing the other packages until the managed package installation is complete. You can also go to the Deployment Status page in Setup to watch the installation progress. A gray circle turns green if the installation is successful or red if it fails.

9. After you receive the email, click **Done**. This action takes you to the Installed Packages page in Setup, where you can verify that the package is installed.



What's next: Switch to the Salesforce standard data model and runtime. See Disable the Managed Package Runtime and Deploy Custom Lightning Web Components. By default, Omnistudio uses the custom data model, and the Managed Package Runtime setting is enabled. For more information on Omnistudio, see Omnistudio for Managed Packages and Omnistudio.

Omnistudio Post Installation Tasks for Summer '23 and Later

After you've installed the managed package, you must configure Remote Site Settings and assign Permission Sets to users.

Omnistudio Post Installation Tasks for Spring '23
After you've installed the managed package, you must configure Remote Site Settings and assign Permission Sets to users.

Omnistudio Post Installation Tasks for Winter '23
After you've installed the managed package, you must configure Remote Site Settings and assign Permission Sets to users.

Omnistudio Post-Installation Tasks for Summer '22
After you've installed the managed package, you must configure Remote Site Settings and assign Permission Sets to users.

Omnistudio Post-Installation Tasks for Spring '22
After you've installed the managed package, you must configure Remote Site Settings and assign Permission Sets to users.

Omnistudio Post-Installation Tasks for Winter '22
After you've installed the managed package, you must configure Remote Site Settings and assign Permission Sets to users.

Omnistudio Post-Upgrade Tasks for Winter '22
This release requires only two post-upgrade tasks: edit the profile and the permission set for Digital Experience users.

Omnistudio Post-Installation Tasks for Summer '21
After you've installed the managed package, you must configure Remote Site Settings and assign Permission Sets to users.

Manually Update Remote Site Settings for Flexcards
Manually grant access to your org domains to enable LWC features such as Preview. When spinning a new org or new installation, the Tooling API calls necessary for LWC may fail if the Remote Site Setting page in your org does not include the URLs required. The required URLs are your org's lightning.force.com URL and the vf.force.com URL of the Visualforce page that contains the Flexcard Designer.

Omnistudio Post Installation Tasks for Summer '23 and Later

After you've installed the managed package, you must configure Remote Site Settings and assign Permission Sets to users.

For details about the licenses associated with the permission sets, see Omnistudio Permission Sets.

Many of the post-installation tasks configure different levels of access for three types of users: create/edit, read-only, and Experience.

- Create/Edit – Users that create and edit Omnistudio components.
- Read-Only – Users that run Omnistudio components but must not be able to create or edit them.
- Experience – Users with Experience sites access that run Omnistudio components but must not be

able to create or edit them. See Create Experience Cloud Site Users.

Post-installation tasks are as follows:

1. Assign the Org Default Lightning record page for the Flexcard Designer. See Open a Flexcard in a Canvas Instead of the Record Page Detail.
2. Add Remote Site Settings for Flexcards. See Manually Update Remote Site Settings for Flexcards.
3. Create permission sets for non-Experience users. See Setup Omnistudio Standard User Permission Sets.
4. Create permission sets for Digital Experience users. See Setup Omnistudio Standard Permission Sets for Experience Site Users.

Omnistudio Post Installation Tasks for Spring ‘23

After you’ve installed the managed package, you must configure Remote Site Settings and assign Permission Sets to users.

For details about the licenses associated with the permission sets, see Omnistudio Permission Sets.

Many of the post-installation tasks configure different levels of access for three types of users: create/edit, read-only, and Experience.

- Create/Edit – Users that create and edit Omnistudio components.
- Read-Only – Users that run Omnistudio components but must not be able to create or edit them.
- Experience – Users with Experience sites access that run Omnistudio components but must not be able to create or edit them. See Create Experience Cloud Site Users.

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1. Assign the Org Default Lightning record page for the Flexcard Designer. See Open a Flexcard in a Canvas Instead of the Record Page Detail.
2. Add Remote Site Settings for Flexcards. See Manually Update Remote Site Settings for Flexcards.
3. Create permission sets for non-Experience users. See Setup Omnistudio Standard User Permission Sets.
4. Create permission sets for Digital Experience users. See Setup Omnistudio Standard Permission Sets for Experience Site Users.

Omnistudio Post Installation Tasks for Winter ‘23

After you’ve installed the managed package, you must configure Remote Site Settings and assign Permission Sets to users.

For details about the licenses associated with the permission sets, see Omnistudio Permission Sets.

Many of the post-installation tasks configure different levels of access for three types of users: create/edit, read-only, and Experience.

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3. Create permission sets for non-Experience users. See Setup Omnistudio Standard User Permission Sets.
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Omnistudio Post-Installation Tasks for Summer '22

After you've installed the managed package, you must configure Remote Site Settings and assign Permission Sets to users.

For details about the licenses associated with the permission sets, see Omnistudio Permission Sets.

Many of the post-installation tasks configure different levels of access for three types of users: create/edit, read-only, and Experience.

- Create/Edit – Users that create and edit Omnistudio components.
- Read-Only – Users that run Omnistudio components but must not be able to create or edit them.
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Post-installation tasks are as follows:

1. Assign the Org Default Lightning record page for the Flexcard Designer. See Open a Flexcard in a Canvas Instead of the Record Page Detail.
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3. Create permission sets for non-Experience users. See Setup Omnistudio Standard User Permission Sets.
4. Create permission sets for Digital Experience users. See Setup Omnistudio Standard Permission Sets for Experience Site Users.

Omnistudio Post-Installation Tasks for Spring '22

After you've installed the managed package, you must configure Remote Site Settings and assign Permission Sets to users.

For details about the licenses associated with the Permission Sets, see Omnistudio Permission Sets.

Many of the post-installation tasks configure different levels of access for three types of users: designer, non-designer, and Digital Experience.

- Designers – Users that create and edit Omnistudio components.
- Non-designers – Users that run Omnistudio components but must not be able to create or edit them.
- Digital Experience – Users with Community access that run Omnistudio components but must not be able to create or edit them. See Create Experience Cloud Site Users.

Post-installation tasks are as follows:

1. Assign the Org Default Lightning record page for the Flexcard Designer. See Open a Flexcard in a Canvas Instead of the Record Page Detail.
2. Add Remote Site Settings for Flexcards. See Manually Update Remote Site Settings for Flexcards.
3. Create permission sets for non-Experience users. See Setup Omnistudio User Permission Sets.
4. Create permission sets for Digital Experience users. See Setup Omnistudio Permission Sets for Experience Cloud Site Users.

Omnistudio Post-Installation Tasks for Winter '22

After you've installed the managed package, you must configure Remote Site Settings and assign Permission Sets to users.

For details about the licenses associated with the Permission Sets, see Omnistudio Permission Sets.

Many of the post-installation tasks configure different levels of access for three types of users: designer, non-designer, and Digital Experience.

Post-installation tasks are as follows:

1. Assign the Org Default Lightning record page for the Flexcard Designer. See Open a Flexcard in a Canvas Instead of the Record Page Detail.
2. Add Remote Site Settings for Flexcards. See Manually Update Remote Site Settings for Flexcards.
3. Create permission sets for non-Experience users. See Setup Omnistudio User Permission Sets.
4. Create permission sets for Digital Experience users. See Setup Omnistudio Permission Sets for Experience Cloud Site Users.

Omnistudio Post-Upgrade Tasks for Winter '22

This release requires only two post-upgrade tasks: edit the profile and the permission set for Digital Experience users.

1. Edit the profile for Digital Experience users:
   a. From Setup, enter *Profile* in the Quick Find box, then select **Profiles**.
   b. Next to the profile for Digital Experience (Community) users, click **Edit**.

c. Scroll to the Standard Object Permissions section and check the boxes for **Read** access to these objects:

   - Omni Electronic Signature Templates
   - Omni Process Transient Data

d. Scroll to the top of the page and click **Save**.

2. Edit the permission set for Digital Experience users:

   a. From Setup, enter *Perm* in the Quick Find box, then select **Permission Sets**.

   b. Click the name of the permission set for Digital Experience (Community) users.

   c. Click **System Permissions**, then click **Edit**.

   d. Check the **Enabled** box for the permission named **Grant users access to Industries Interaction Calculation features.**

   e. Click **Save**. When a prompt appears listing dependent permissions, click **Save** again.

3. If you are using DocuSign integration in Omnistudio, you must update your DocuSign security configuration to continue using DocuSign. See Integrate DocuSign with Omniscripts .

Omnistudio Post-Installation Tasks for Summer '21

After you've installed the managed package, you must configure Remote Site Settings and assign Permission Sets to users.

For details about the licenses associated with the Permission Sets, see Omnistudio Permission Sets.

Many of the post-installation tasks configure different levels of access for three types of users: designer, non-designer, and Digital Experience.

- Designers – Users that create and edit Omnistudio components.
- Non-designers – Users that run Omnistudio components but must not be able to create or edit them.
- Digital Experience – Users with Community access that run Omnistudio components but must not be able to create or edit them. See Create Experience Cloud Site Users.

Post-installation tasks are as follows:

1. Assign the Org Default Lightning record page for the Flexcard Designer. See Open a Flexcard in a Canvas Instead of the Record Page Detail.
2. Add Remote Site Settings for Flexcards. See Manually Update Remote Site Settings for Flexcards.
3. Create permission sets for non-Experience users. See Setup Omnistudio User Permission Sets.
4. Create permission sets for Digital Experience users. See Setup Omnistudio Permission Sets for Experience Cloud Site Users.

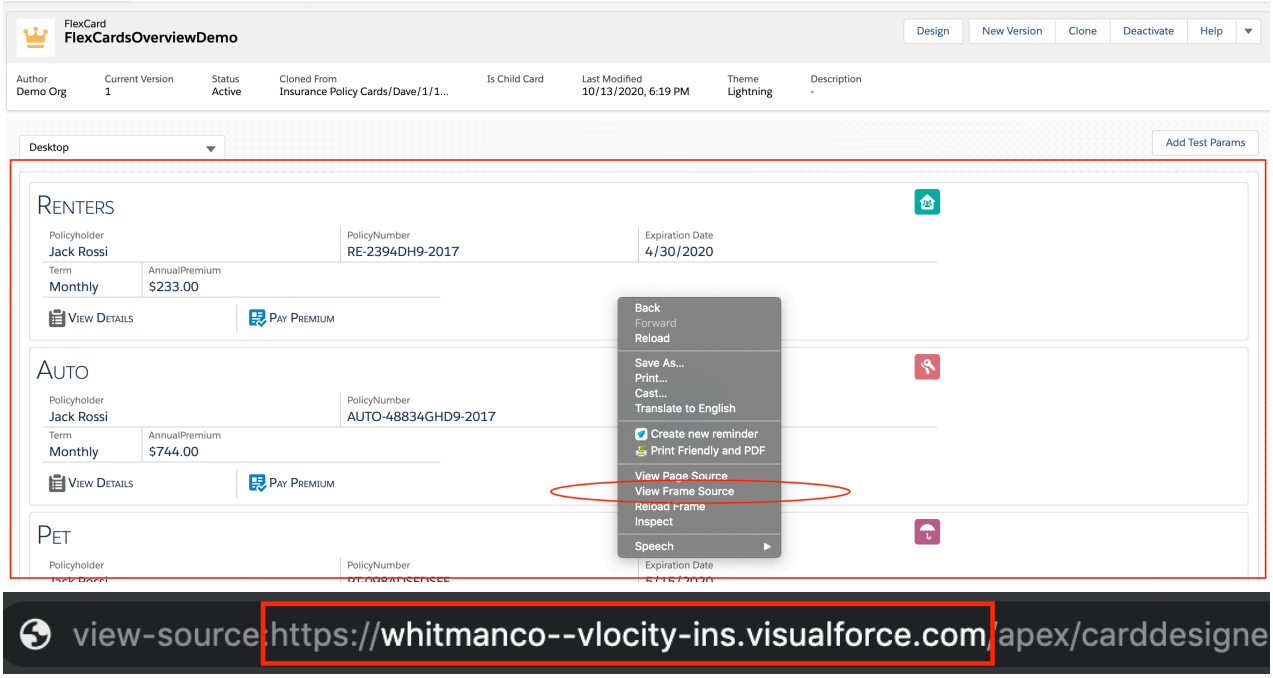
Manually Update Remote Site Settings for Flexcards

Manually grant access to your org domains to enable LWC features such as Preview. When spinning a new org or new installation, the Tooling API calls necessary for LWC may fail if the Remote Site Setting page in your org does not include the URLs required. The required URLs are your org's lightning.force.com URL and the vf.force.com URL of the Visualforce page that contains the Flexcard Designer.

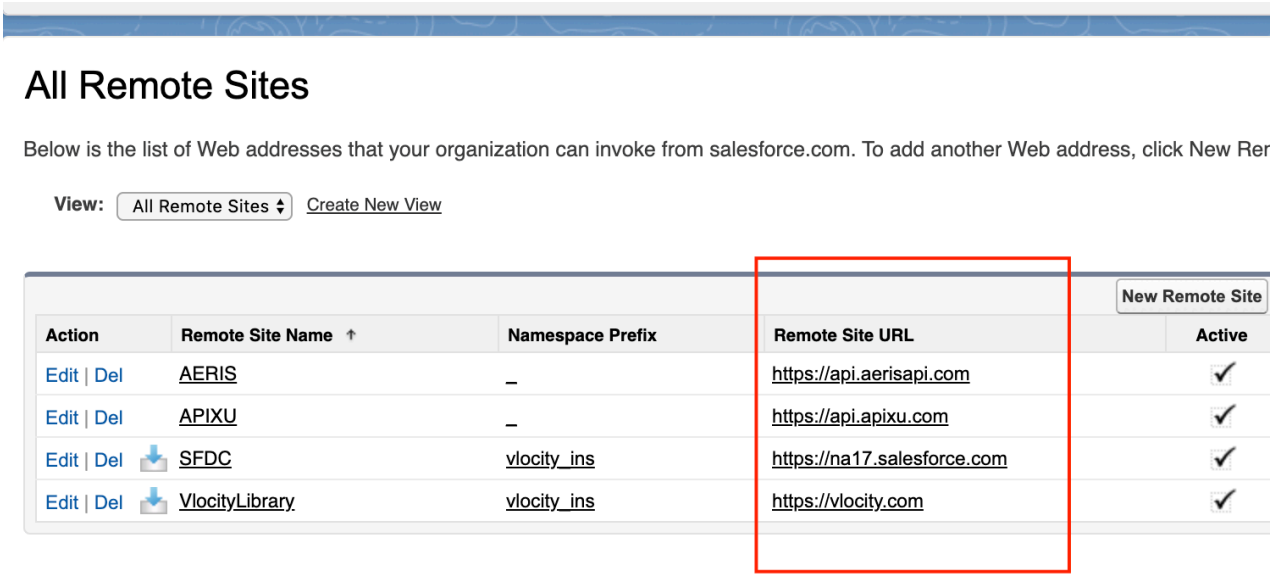
Note In Winter '24 and later releases, configuring Remote Site Settings for Flexcards isn't necessary, and the warning message about Remote Site Settings no longer appears on the Flexcards tab.

See Remote Site Settings.

1. In your org, open any Flexcard to view the Flexcard Designer, and click the Preview link in the submenu.
2. Right-click in the white space that contains your Flexcard content to view the menu options in a popup. Select **View Frame Source** to open the iframe in a new browser tab, and copy your `vf.force.com` domain from the address bar. For example, *`https://MyDomainName--c.vf.force.com`*.



3. In your org, go to Setup > Security > Remote Site Settings.
4. Confirm that your org domains are not listed in the **Remote Site URL** column.



5. Click **New Remote Site**.
6. Enter a **Remote Site Name** without spaces for the vf.force.com domain. For example, enter *LWC_VF*.
7. Enter your copied vf.force.com URL in **Remote Site URL**. For example, enter *https://MyDomainName--c.vf.force.com*.
8. Confirm that the **Active** checkbox is enabled.
9. Click **Save**.
10. Repeat steps 3 and 5.
11. Enter a **Remote Site Name** without spaces for the lightning.force.com domain. For example, enter *LWC_LF*.
12. Enter the lightning.force.com URL visible in the address browser bar on all pages in your org. For example, enter *https://whitmanco.lightning.force.com*.
13. Repeat steps 8 and 9.

Omnistudio Permission Sets

Grant permissions to administrators to create and manage Omnistudio objects, such as Flexcards, Omniscripts, Integration Procedures, and Omnistudio Data Mappers. Grant consumers permission to view only Omniscript objects.

The Omnistudio managed package includes permission sets, a collection of settings and permissions that give users access to tools and functions in the package. These permission sets must be assigned to users to grant the necessary base-level access to create, read, edit, and delete records for each Omnistudio object.

For information on permission sets, see Permission Sets.

Important The Omnistudio Admin permission set license has been renamed Omnistudio now

includes two available permission sets, Omnistudio Admin and Omnistudio User.

To assign the permission sets, see Setup Omnistudio Standard User Permission Sets.

To grant users Read access to Omnistudio objects through an Experience Builder site or off-platform, see Setup Omnistudio Standard Permission Sets for Experience Site Users.

Omnistudio Permission Sets

Permission Set	Description	Object Permissions
Omnistudio Admin	Grants admins and designers full Create, Read, Update, and Delete (CRUD) access for Omnistudio objects.	Create, Read, Update, Delete. Flexcards (Omni UI Card), Omniscripts (Omni Process), Data Mappers (Omni Data Transformation), Integration Procedures (Omni Process), and OmniGlobalAutoNumber
Omnistudio User	Grants consumers Read access for Omnistudio objects, and Create access for Omniscript Saved Sessions. **Note** In Spring '22 and Summer '22, this permission set may not be present by default. See Create an Omnistudio Permission Set Group for Standard Read-Only Users.	Read Flexcards (Omni UI Card), Omniscripts (Omni Process), Data Mappers (Omni Data Transformation), Integration Procedures (Omni Process), and OmniInteractionAccessConfiguration Read and Update OmniGlobalAutoNumber Create, Read, Update, Delete Omniscript Saved Session **Note** Guest users and Experience Cloud users can't use Omniscript Saved Sessions because security policies prevent them from retaining ownership of

Permission Set	Description	Object Permissions
		records they create.

Omnistudio Content Access

Omnistudio content access	License and permission set required
Create and manage Omnistudio content	Omnistudio PSL and Omnistudio Admin permission set
View Omnistudio content in Lightning Experience	Omnistudio PSL and Omnistudio User permission set
View Omnistudio content in Experience Builder Aura sites as an authenticated user	Omnistudio Runtime for Communities PSL and custom permission set for authenticated user
View Omnistudio content in Experience Builder Aura sites as an unauthenticated/guest user	Omnistudio PSL and custom permission set for guest user

Setup Omnistudio User Permission Sets
Configure users who must have access to Omnistudio business processes without the specific admin privileges associated with the Omnistudio license. Salesforce recommends using permission sets, together with Roles and Sharing Rules, to manage the access levels of different users.

Setup Omnistudio Permission Sets for Experience Cloud Site Users
Grant Experience Cloud site (Community) users the license and permissions they need to access Omnistudio content. Salesforce recommends using permission sets, together with Roles and Sharing Rules, to manage the access levels of different users.

Setup Omnistudio Standard User Permission Sets
Configure users who must have access to Omnistudio business processes without the specific admin privileges associated with the Omnistudio license. Salesforce recommends using permission sets, together with Roles and Sharing Rules, to manage the access levels of different users.

Setup Omnistudio Standard Permission Sets for Experience Site Users
Grant Experience Cloud site (Community) users the license and permissions they need to access Omnistudio content. Salesforce recommends using permission sets, together with Roles and Sharing Rules, to manage the access levels of different users.

Grant Digital Experience Guest Users Omnistudio Access
Give guest users access to the Omnistudio standard objects when they're not logged in to an Experience site. Create a custom permission set that restricts access to read-only, assign the permission set to the guest user, and create sharing rules that make the information available to anonymous users.

Create a Permission Set for the Enhanced Runtime Performance Omnistudio Setting
If you've enabled Enhanced Runtime Performance in Omnistudio settings, create a permission set to

let standard users access Omnistudio components based on their permissions.

Setup Omnistudio User Permission Sets

Configure users who must have access to Omnistudio business processes without the specific admin privileges associated with the Omnistudio license. Salesforce recommends using permission sets, together with Roles and Sharing Rules, to manage the access levels of different users.

The instructions on this page describe how to setup an Omnistudio User permission set using the Omnistudio license by creating and assigning permissions set groups for read-only users and create/edit users.

- Read-Only users run Omnistudio components but must not be able to create or edit them.
- Create/Edit users can create and edit Omnistudio components.

Note To setup Omnistudio permissions sets for Experience Cloud site users, see Setup Omnistudio Standard Permission Sets for Experience Site Users.

1. For Read-Only users:
   a. Create an Omnistudio Permission Set Group for Standard Read-Only Users
   b. Create an Omnistudio Standard Read-Only User Profile
   c. Assign an Omnistudio Permission Set Group to Standard Read-Only Users
2. For Create/Edit users:
   a. Create an Omnistudio Permission Set Group for Standard Create/Edit Users
   b. Create an Omnistudio Standard User Profile for Create/Edit Users
   c. Assign an Omnistudio Permission Set Group for Standard Create/Edit Users
3. For orgs that have enabled the Enhanced Runtime Performance Omnistudio Setting, see Create a Permission Set for the Enhanced Runtime Performance Omnistudio Setting.

Setup Omnistudio Permission Sets for Experience Cloud Site Users

Grant Experience Cloud site (Community) users the license and permissions they need to access Omnistudio content. Salesforce recommends using permission sets, together with Roles and Sharing Rules, to manage the access levels of different users.

1. Create an Omnistudio Permission Set for Standard Experience Users
2. (Optional) Create an Omnistudio Permission Set Group for Standard Experience Site Users
3. Create an Omnistudio Profile for Standard Experience Cloud Site Users
4. Assign the Omnistudio Permission Set or Group to Standard Experience Site Users

Setup Omnistudio Standard User Permission Sets

Configure users who must have access to Omnistudio business processes without the specific admin privileges associated with the Omnistudio license. Salesforce recommends using permission sets, together with Roles and Sharing Rules, to manage the access levels of different users.

The instructions on this page describe how to setup an Omnistudio Standard User permission set using the Omnistudio license by creating and assigning permissions set groups for read-only users and create/edit users.

- Read-Only users run Omnistudio components but must not be able to create or edit them.
- Create/Edit users can create and edit Omnistudio components.

Note To set up Omnistudio standard permissions sets for Experience Cloud site users, see Setup Omnistudio Standard Permission Sets for Experience Site Users.

1. For Read-Only users:
   a. Create an Omnistudio Permission Set Group for Standard Read-Only Users
   b. Create an Omnistudio Standard Read-Only User Profile
   c. Assign an Omnistudio Permission Set Group to Standard Read-Only Users
2. For Create/Edit users:
   a. Create an Omnistudio Permission Set Group for Standard Create/Edit Users
   b. Create an Omnistudio Standard User Profile for Create/Edit Users
   c. Assign an Omnistudio Permission Set Group for Standard Create/Edit Users

Create an Omnistudio Permission Set Group for Standard Read-Only Users

Create a permission set group for users that run Omnistudio components but must not be able to create or edit them.

Create an Omnistudio Standard Read-Only User Profile

Depending on how you configure roles and sharing rules, your Omnistudio user can access specific features that are restricted. We recommend that only users with the Omnistudio license have access to the designers and perform actions such as building business processes. After creating an Omnistudio Standard Read-Only user assigned to the Omnistudio license, create a profile to enforce this limitation.

Assign an Omnistudio Permission Set Group to Standard Read-Only Users

Assign the Omnistudio standard user permission set or the permission set group you created to users that run Omnistudio components but must not be able to create or edit them.

Create an Omnistudio Permission Set Group for Standard Create/Edit Users

Create a permission set group for users who must have the Omnistudio Admin permission set and additional permissions. The Omnistudio Admin permission set grants admins and users who create and edit Omnistudio components, full Create, Read, Update and Delete (CRUD) access for Omnistudio standard objects.

Create an Omnistudio Standard User Profile for Create/Edit Users

We recommend that only users with the Omnistudio license have access to the designers and perform actions such as designing business processes. After creating an Omnistudio Standard Create/Edit User

assigned to the Omnistudio license, create an Omnistudio Standard User Profile to allow use of the designers to design business processes.

Assign an Omnistudio Permission Set Group for Standard Create/Edit Users
After you've created a permission set group for users who can create and edit Omnistudio components, you must assign the group to the users.

Create an Omnistudio Permission Set Group for Standard Read-Only Users

Create a permission set group for users that run Omnistudio components but must not be able to create or edit them.

Before You Begin

- Confirm you have the Omnistudio permission set license. Go to Setup > Permission Sets and look for **Omnistudio Admin** in the list of permission sets.

1. From Setup, enter *Perm* in the Quick Find box, then select **Permission Sets**.
2. Next to the Omnistudio Admin permission set, click **Clone**.
3. For the **Label**, enter *Omnistudio Standard User*. By default the **API Name** is the same. Click **Save**.
4. Click **Omnistudio Standard User**, then click **Object Settings**.
5. Under Object Permissions, select **Read**.
6. Under Field Permission, select **Read Access** for all fields.
7. Save your changes.
8. Repeat these steps for the following objects:
   - Omni Data Transformation Item
   - Omni Data Transformation
   - Omni Electronic Signature Template
   - Omni Process Compilation
   - Omni Process Element
   - Omni Process
   - Omni UI Card

   Don't edit the Omniscript Saved Sessions object permissions, which must be **Read**, **Create**, **Edit**, and **Delete**.

9. For each object, set field-level security for all user profiles.
   a. From Setup, click **Object Manager**.
   b. Select an Omnistudio standard object.
   c. Click **Fields & Relationships**.
   d. Click any field and click **Set Field-Level Security**.
   e. Select **Visible** for the users you want to provide field-level access.
   f. Repeat the steps for each required field.
10. From Setup, enter *Perm* in the Quick Find box, then select **Permission Sets**. Click **New**.
11. Enter any **Label**, such as *Omnistudio Standard User Extras*. By default the **API Name** is the same. Click **Save**.

12. Click **Apex Class Access**, then click **Edit**.
13. Move these classes from the **Available Apex Classes** list to the **Enabled Apex Classes** list if they aren't there already:
    - omnistudio.ComponentController
    - omnistudio.BusinessProcessDisplayController
    - omnistudio.FlexRuntime
    - omnistudio.NewportUtilities
14. Click **Save**, then click **Permission Set Overview**.
15. Click **Visualforce Page Access**, then click **Edit**.
16. Move omnistudio.UserCustomLabels to the Enabled Visualforce Pages list, then click **Save**.
17. From Setup, enter *Perm* in the Quick Find box, then select **Permission Set Groups**.
18. Click **New Permission Set Group**.
19. Enter any **Label**, such as *Omnistudio Standard Users Group*. By default the **API Name** is the same. Click **Save**.
20. Click **Permission Sets in Group**, then click **Add Permission Set**.
21. Check the boxes for both the permission set you created and the **Omnistudio Standard User** permission set. Click **Add**, then **Done**.

What's next: Create an Omnistudio Standard Read-Only User Profile.

Create an Omnistudio Standard Read-Only User Profile

Depending on how you configure roles and sharing rules, your Omnistudio user can access specific features that are restricted. We recommend that only users with the Omnistudio license have access to the designers and perform actions such as building business processes. After creating an Omnistudio Standard Read-Only user assigned to the Omnistudio license, create a profile to enforce this limitation.

Before you begin Create an Omnistudio Permission Set Group for Standard Read-Only Users.

1. From Setup, in the Quick Find box, enter *Profiles*, and then select **Profiles**.
2. Next to Standard User click **Clone**.
   Cloning an existing profile is a best practice. You can clone any profile that grants access to the Omnistudio standard objects
3. Enter a profile name, such as *Omnistudio Standard User Profile* and then save your changes.
4. In the Apps section, click **Assigned Apps**.
5. Click **Edit**.
6. Deselect **Visible** for Omnistudio and then save your changes.
7. Click **Profile Overview**.
8. Click **Object Settings**.
9. For each of these objects, click the object name, click **Edit**, set the Tab Settings to Tab Hidden, and then save your changes.
   - Omniscripts
   - Omnistudio DataPack
   - Omnistudio Data Mapper
   - Omnistudio Flexcards

- Omnistudio Integration Procedure
- Omni Data Packs
- Omni Data Transformations
- Omni Data Transformation Items
- Omni Electronic Signature Templates
- Omni Process Compilations
- Omni Process Elements
- Omni Processes
- Omni Process Transient Data
- Omni UI Cards

For Omnistudio sObject descriptions, see Omnistudio sObject Descriptions.

10. To allow users access to the custom tabs, keep the tab settings for Omniscript Workbench and Omnistudio DocuSign Templates on *Default On*. Otherwise, change them to *Tab Hidden*.

What's next: Assign an Omnistudio Permission Set Group to Standard Read-Only Users.

Assign an Omnistudio Permission Set Group to Standard Read-Only Users

Assign the Omnistudio standard user permission set or the permission set group you created to users that run Omnistudio components but must not be able to create or edit them.

Before You Begin

- Create an Omnistudio Permission Set Group for Standard Read-Only Users
- Create an Omnistudio Standard Read-Only User Profile

1. From Setup, enter *Users* in the Quick Find box, then select **Users**.
2. Click **Edit** next to the name of a user to whom you want to assign the Permission Set or Permission Set Group.
3. Make sure the **User License** is set to *Salesforce* and the **Profile** is set to the cloned profile you created, and click **Save**.
4. Click the name of the user (not the Edit link).
5. In the Permission Set Assignments or Permission Set Group Assignments related list, click **Edit Assignments**.
6. In the **Available Permission Set Groups** list, select the Permission Set Group you created. Click **Add**, then **Save**.
7. If a **review the following license assignment** prompt appears, click **Continue**.
8. Repeat steps 1-7 for all read-only, non-Experience/Community users.

Create an Omnistudio Permission Set Group for Standard Create/Edit Users

Create a permission set group for users who must have the Omnistudio Admin permission set and additional permissions. The Omnistudio Admin permission set grants admins and users who create and edit Omnistudio components, full Create, Read, Update and Delete (CRUD) access for Omnistudio standard objects.

Before You Begin

- Confirm you have the Omnistudio permission set license. Go to Setup > Permission Sets and look for **Omnistudio Admin** in the list of permission sets.

1. From Setup, enter *Perm* in the Quick Find box, then select **Permission Sets**. Click **New**.

   Don't clone an existing Permission Set or assign any Permission Set Licenses.

2. Enter any **Label**, such as *Omnistudio Designer Users*. By default the **API Name** is the same. Click **Save**.
3. Scroll to the end of the Permission Sets page and click **System Permissions**. Click **Edit**.
4. Check the **Enabled** box for **Customize Application** and **Modify Metadata Through Metadata API Functions**.

   Important There are implications for enabling these permissions for users other than the Salesforce admin. See User capabilities with 'Customize Application' Profile permission and Modify Metadata Through Metadata API Functions Permission.

5. Click **Save**. When a prompt appears listing dependent permissions, click **Save** again.
6. Click **Permission Set Overview**, then click **Object Settings**.
7. Scroll to the end of the page and click **Vlocity DataPack Objects**. Click **Edit**.
8. Under Object Permissions, in the Enable column, check **Read**, **Create**, **Edit**, and **Delete**.
9. Under Field Permissions, check every box you can in the Edit Access column. Click **Save**.
10. Click **Permission Set Overview**, then **Visualforce Page Access**. Click **Edit**.
11. Move omnistudio.OmniScriptInstancePage and omnistudio.UserCustomLabels to the Enabled Visualforce Pages list, then click **Save**.
12. From Setup, enter *Perm* in the Quick Find box, then select **Permission Set Groups**.
13. Click **New Permission Set Group**.
14. Enter any **Label**, such as *Omnistudio Designer Users Group*. By default the **API Name** is the same. Click **Save**.
15. Click **Permission Sets in Group**, then click **Add Permission Set**.
16. Check the boxes for both the permission set you created and the **Omnistudio Admin** Permission Set. Click **Add**, then **Done**.

What's next: Create an Omnistudio Standard User Profile for Create/Edit Users.

Create an Omnistudio Standard User Profile for Create/Edit Users

We recommend that only users with the Omnistudio license have access to the designers and perform actions such as designing business processes. After creating an Omnistudio Standard Create/Edit User assigned to the Omnistudio license, create an Omnistudio Standard User Profile to allow use of the designers to design business processes.

Before You Begin

- Create an Omnistudio Permission Set Group for Standard Create/Edit Users

1. From Setup, enter *Profile* in the Quick Find box, then select **Profiles**.
2. Next to Standard User click **Clone**.

   Cloning an existing profile is a best practice. You can clone any profile that grants access to the Omnistudio standard objects

3. Enter a Profile Name, such as *Omnistudio Standard User Designer Profile*.
4. Click **Save**, then click **Edit**.
5. Under Custom App Settings, leave **Visible** selected for Omnistudio.
6. Under Tab Settings, leave the follow as *Default On*:
   - Omni Data Packs
   - Omni Data Transformations
   - Omni Data Transformation Items
   - Omni Electronic Signature Templates
   - Omni Process Compilations
   - Omni Process Elements
   - Omni Processes
   - Omni Process Transient Data
   - Omni UI Cards

   For Omnistudio sObject descriptions, see Omnistudio sObject Descriptions.

7. Under Custom Tab Settings, leave the following as *Default On*:
   - Omniscripts
   - Omnistudio DataPack
   - Omnistudio Data Mapper
   - Omnistudio Flexcards
   - Omnistudio Integration Procedure

   Note To allow users access to Omnistudio Workbench and DocuSign templates, keep both Omniscript Workbench and Omnistudio DocuSign Templates on *Default On*. Otherwise, set the to *Tab Hidden*.

What's next: Assign an Omnistudio Permission Set Group for Standard Create/Edit Users.

Assign an Omnistudio Permission Set Group for Standard Create/Edit Users

After you've created a permission set group for users who can create and edit Omnistudio components, you must assign the group to the users.

Before You Begin

- Create an Omnistudio Permission Set Group for Standard Create/Edit Users

1. From Setup, enter *Users* in the Quick Find box, then select **Users**.
2. Click **Edit** next to the name of a user to whom you want to assign the permission set group.
3. Make sure the **User License** is set to *Salesforce* and the **Profile** is set to the cloned profile you

created, and click **Save**.
4. Click the name of the user (not the Edit link).
5. In the Permission Set Group Assignments related list, click **Edit Assignments**.
6. In the **Available Permission Set Groups** list, select the permission set group you created. Click **Add**, then **Save**.
7. If a **review the following license assignment** prompt appears, click **Continue**.
8. Repeat steps 1-7 for all create/edit users.

Setup Omnistudio Standard Permission Sets for Experience Site Users

Grant Experience Cloud site (Community) users the license and permissions they need to access Omnistudio content. Salesforce recommends using permission sets, together with Roles and Sharing Rules, to manage the access levels of different users.

1. Create an Omnistudio Permission Set for Standard Experience Users
2. (Optional) Create an Omnistudio Permission Set Group for Standard Experience Site Users
3. Create an Omnistudio Profile for Standard Experience Cloud Site Users
4. Assign the Omnistudio Permission Set or Group to Standard Experience Site Users

Create an Omnistudio Permission Set for Standard Experience Users
Create a permission set for Experience (Community) users to grant the license and permissions they need to access Omnistudio content.

Create an Omnistudio Permission Set Group for Standard Experience Site Users
You can create a permission set group for Experience Cloud site (Community) users. This task is optional but recommended for consistency with other user types.

Create an Omnistudio Profile for Standard Experience Cloud Site Users
After creating an Omnistudio permission set or permission set group, create an Omnistudio profile. Clone the profile for Experience Cloud site users and add Standard Object Permissions and Enabled Apex Class access.

Assign the Omnistudio Permission Set or Group to Standard Experience Site Users
After creating an Omnistudio profile, and an Omnistudio permission set or permission set group for Experience Cloud site users, assign the permission set or the permission set group to the users.

Create an Omnistudio Permission Set for Standard Experience Users

Create a permission set for Experience (Community) users to grant the license and permissions they need to access Omnistudio content.

Note You can't assign the permission set for Digital Experience users to the Guest User Profile.

Before You Begin

- Confirm you have the Omnistudio Runtime for Communities license. Go to Setup > Permission Sets and look for **Omnistudio Runtime for Communities** in the list of permission sets.

1. From Setup, enter *Perm* in the Quick Find box, then select **Permission Sets**.
2. Click **New**.
3. Enter any **Label**, such as *Omnistudio Experience Users*. By default the **API Name** is the same.
4. From the **License** list, select **Omnistudio Runtime for Communities**.
5. Click **Save**.
6. Click **System Permissions**, then click **Edit**.
7. Check the **Enabled** box for the permission named **Enables consumers and partners to execute Omniscripts, DRs, Cards through a Community or off platform.**
8. Click **Save**. When a prompt appears listing dependent permissions, click **Save** again.

What's next:

- (Optional) Create an Omnistudio Permission Set Group for Standard Experience Site Users
- Create an Omnistudio Profile for Standard Experience Cloud Site Users

Create an Omnistudio Permission Set Group for Standard Experience Site Users

You can create a permission set group for Experience Cloud site (Community) users. This task is optional but recommended for consistency with other user types.

Before You Begin

- Create an Omnistudio Permission Set for Standard Experience Users

1. From Setup, enter *Perm* in the Quick Find box, then select **Permission Set Groups**.
2. Click **New Permission Set Group**.
3. Enter any **Label**, such as *Omnistudio Experience Users Group*. By default the **API Name** is the same. Click **Save**.
4. Click **Permission Sets in Group**, then click **Add Permission Set**.
5. Check the box for the permission set you created in the previous task. Click **Add**, then **Done**.

What's next: Create an Omnistudio Profile for Standard Experience Cloud Site Users.

Create an Omnistudio Profile for Standard Experience Cloud Site Users

After creating an Omnistudio permission set or permission set group, create an Omnistudio profile. Clone the profile for Experience Cloud site users and add Standard Object Permissions and Enabled Apex Class access.

Before You Begin

1. Create an Omnistudio Permission Set for Standard Experience Users

2. (Optional) Create an Omnistudio Permission Set Group for Standard Experience Site Users

1. From Setup, enter *Profile* in the Quick Find box, then select **Profiles**.
2. Next to the Customer Community User or Customer Community Plus User profile, click **Clone**.

   Cloning an existing profile is a best practice. You can clone any profile that grants access to the Omnistudio standard objects.

3. Enter any profile name, such as *Omnistudio Standard Experience Users Profile*.
4. Click **Save**, then click **Edit**.
5. Scroll to the Standard Object Permissions section and select **Read** access to these objects:
   - Decision Matrices
   - Decision Matrix Columns
   - Decision Matrix Rows
   - Decision Matrix Versions
   - Expression Sets
   - Expression Set Steps
   - Expression Set Step Relationships
   - Expression Set Variables
   - Expression Set Versions
   - Omni Data Transformation (Omnistudio Data Mappers)
   - Omni Data Transformation Item (Data Mapper metadata)
   - Omni Electronic Signature Template (DocuSign signature template for Omniscripts)
   - Omni Process (Omniscripts and Integration Procedures)
   - Omni Process Compilation (Compiled Omniscripts and Integration Procedures)
   - Omni Process Element (Omniscript elements)
   - Omni Process Transient Data (Temporarily stored data for Omniscripts and Integration Procedures)
   - Omni UI Card (Flexcards)

   Note Guest users and Experience Cloud users can't use Omniscript Saved Sessions because security policies prevent them from retaining ownership of records they create.
6. Scroll to the top of the page and click **Save**.
7. Click the name of the profile (not the Edit link).
8. Scroll to the **Enabled Apex Class Access** section and click **Edit**.
9. Move these classes from the **Available Apex Classes** list to the **Enabled Apex Classes** list if they aren't there already:
   - omnistudio.ComponentController
   - omnistudio.BusinessProcessDisplayController
   - omnistudio.NewportUtilities
10. Scroll to the **Enabled Visualforce Page Access** section and click **Edit**.
11. Move these Visualforce pages from the Available Visualforce Pages list to the Enabled Visualforce Pages list if they aren't there already:
    - omnistudio.OmniScriptInstancePage
    - omnistudio.UserCustomLabels
12. Click **Save**.

What's next: Assign the Omnistudio Permission Set or Group to Standard Experience Site Users.

Assign the Omnistudio Permission Set or Group to Standard Experience Site Users

After creating an Omnistudio profile, and an Omnistudio permission set or permission set group for Experience Cloud site users, assign the permission set or the permission set group to the users.

To create these users, see Create Experience Cloud Site Users.

Before You Begin

1. Create an Omnistudio Permission Set for Standard Experience Users
2. (Optional) Create an Omnistudio Permission Set Group for Standard Experience Site Users
3. Create an Omnistudio Profile for Standard Experience Cloud Site Users

To assign the correct users to your permission set or permission set group, complete these tasks.

1. From Setup, enter *Users* in the Quick Find box, then select **Users**.
2. Click **Edit** next to the name of a user to whom you want to assign the Permission Set or Permission Set Group.
3. Make sure the **User License** is set to *Customer Community* and the **Profile** is set to the profile you created for Experience Cloud site users, and click **Save**.
4. Click the name of the user (not the Edit link).
5. In the Permission Set Assignments or Permission Set Group Assignments related list, click **Edit Assignments**.
6. In the **Available Permission Sets** or **Available Permission Set Groups** list, select the Permission Set or Permission Set Group you created for Experience Cloud site users. Click **Add**, then **Save**.
7. If a **review the following license assignment** prompt appears, click **Continue**.
8. Repeat steps 1-7 for all Experience Cloud site users.

Grant Digital Experience Guest Users Omnistudio Access

Give guest users access to the Omnistudio standard objects when they're not logged in to an Experience site. Create a custom permission set that restricts access to read-only, assign the permission set to the guest user, and create sharing rules that make the information available to anonymous users.

Salesforce recommends using permission sets, together with roles and sharing rules, to manage the access levels of different users.

Create an Omnistudio Permission Set for Digital Experience Guest Users
Create an Omnistudio custom permission set that restricts access to read-only for unauthenticated guest users on Experience sites.

Assign an Omnistudio Permission Set to Digital Experience Guest Users

Assign the Omnistudio guest user permission set to anonymous users who can view Omnistudio components on an Experience site.

Create Sharing Rules for Digital Experience Guest Users
Create sharing rules that allow anonymous users access to Omnistudio content on Experience sites.

Create an Omnistudio Permission Set for Digital Experience Guest Users

Create an Omnistudio custom permission set that restricts access to read-only for unauthenticated guest users on Experience sites.

1. From Setup, enter *Perm* in the Quick Find box, then select **Permission Sets**.
2. Click **New** to create a permission set.
3. Enter a label, such as Omnistudio Guest User. By default, API Name is the same as the label.
4. Select **Omnistudio** from the License dropdown.
5. On the Permission Set Overview page, click **System Permissions**, then click **Edit**.
6. Select **Enables business users to execute OmniScripts, DRs, Cards, etc, in employee facing apps**, then click **Save**.
7. Go back to the Permission Set Overview page and click **Object Settings** to view the list of objects.
8. For each of the Omnistudio objects to which you want to grant guest users access, perform these tasks:
   a. Select the object name.
   b. Click **Edit**.
   c. In Object Permissions, select **Read**. Don't enable any other object permissions.
   d. In Field Permissions, select **Read Access** for all fields.
   e. Click **Save**.

   Note Omnistudio requires Read access on these objects: Omni Data Transformation (Omnistudio Data Mapper) Omni Data Transformation Item (Data Mapper metadata) Omni Process (Omniscripts and Integration Procedures) Omni Process Element (Omniscript element) Omni Process Compilation (compiled Integration Procedure and Omniscript) Omni UI Cards (Flexcard) Guest users can't access Omniscript Saved Sessions or trigger Data Mapper Load rule assignments.

What's next: Assign an Omnistudio Permission Set to Digital Experience Guest Users.

Assign an Omnistudio Permission Set to Digital Experience Guest Users

Assign the Omnistudio guest user permission set to anonymous users who can view Omnistudio components on an Experience site.

- Create an Omnistudio Permission Set for Digital Experience Guest Users

If the Omnistudio guest user permission set is correctly assigned, an *Omnistudio* license is applied to the Omnistudio guest user.

1. From Setup, enter *Digital Experiences* in the Quick Find box, then select **All Sites**.
2. Click **Builder** for the site you want to grant access to guest users.
3. Select the settings icon in the navigation panel, and click General.
4. In the **Public Access** section, select the checkbox **Guest users can see and interact with the site without logging in**.
5. In the **Guest User Profile** section, click the link to the guest user profile.
6. On the user profile page, click **View Users**.
7. Select the name of the guest user.
8. Click **Edit Assignments** in the Permission Set Assignments section.
9. Select *Omnistudio Guest User* in **Available Permission Sets** list, and select **Add** to move it to the **Enabled Permission Sets** list.
10. If you have custom labels, click **Enabled Visualforce Page Access** and then click **Edit**.
11. Move omnistudio.UserCustomLabels to the Enabled Visualforce Pages list, then click **Save**.
12. Click **Save** and confirm assignment under **Permission Set Assignments** section of the user profile page.

What's next: Create Sharing Rules for Digital Experience Guest Users.

Create Sharing Rules for Digital Experience Guest Users

Create sharing rules that allow anonymous users access to Omnistudio content on Experience sites.

For more on sharing rules, see Sharing Rules.

Before you begin:

- Create an Omnistudio Permission Set for Digital Experience Guest Users
- Assign an Omnistudio Permission Set to Digital Experience Guest Users

1. From Setup, enter *Sharing* in the Quick Find box, and select **Sharing Settings**.
2. Scroll down to the Omnistudio object that you want to grant access to the guest user, and click New.

   Important Child objects inherit sharing rules automatically.
3. Configure the sharing rule as follows:

   a. In **Label**, enter a label such as *OmniProcess Guest User Rule*. By default, the **Rule Name** is the same as the **Label**.

   b. (Optional) Enter a **Description**.

   c. Select **Guest user access, based on criteria** as the **Rule Type**.

   d. In **Step 3: Select which records to be shared**, configure the sharing criteria as needed. Make sure your criteria restrict guest user access to only those records required to allow your anonymous workflow to work.

      If your workflow requires guest users to have access to all records of an object, you can use this

criterion. Use this criterion only if you really need it.

Setting	Value
Field	Created By
Operator	Starts With
Value	005

The User object prefix is 005, and every record is created by a User.

e. In **Step 4: Select the users to share with**, select your Omnistudio guest user profile.

f. Click **Save**, then click **OK** at the prompt.

The following message appears: A sharing rule operation is currently in progress. The initiating user will receive an email when each operation finishes.

Note You can't edit or delete your sharing rule until after it has been applied to your org.

4. Repeat steps 2 and 3 for each Omnistudio object that you want to share with guest users.

Create a Permission Set for the Enhanced Runtime Performance Omnistudio Setting

If you've enabled Enhanced Runtime Performance in Omnistudio settings, create a permission set to let standard users access Omnistudio components based on their permissions.

Before You Begin

- Make sure that you've enabled the Enhanced Runtime Performance Omnistudio Setting. For more information, see Omnistudio Permission Sets.
- Confirm you have the Omnistudio permission set license. Go to Setup > Permission Sets and look for **Omnistudio Admin** in the list of permission sets.

In addition to the other permission sets you create to assign users with the required permissions, you must create a separate permission set to provide standard users with the Omni Interaction Access Configurations object required to access Omnistudio components correctly. Admin users don't require this.

1. From Setup, enter *Perm* in the Quick Find box, then select **Permission Sets**.
2. Click **New**.
3. Enter any **Label**, such as *Omnistudio Additional Permissions*. By default, the **API Name** is the same.
4. Leave the **License** dropdown as is and don't make a selection.
5. Click **Save**.
6. Click **Object Settings**, then click **Omni Interaction Access Configurations**.

7. Click **Edit** and in the **Enabled** checkbox, select the required fields as per your users' access requirements. If you're creating this permission set for a read-only user, select **Read**, **View All Records**, and **View All Fields**.
8. Save your permission set.

Assign this permission set to required users.

Omnistudio Settings

Enable settings applicable to the entire Omnistudio product suite from the Omnistudio Settings page in your org's Setup. For example, enable Omnistudio metadata API support from the **Omnistudio Metadata** setting.

Required Versions
Available beginning Spring '22 and later releases for customers on the standard object model.

Note Starting from Summer '25, if you enable the Omnistudio license that is bundled with Salesforce Industries licenses, the Omnistudio standard designer and standard runtime are available by default. Don't install the Omnistudio package.

Note If you use the Salesforce Industries Communications, Media, and Energy (CME) package: Before turning off the Managed Package Runtime setting, verify that the standard runtime supports each component you use. Check each component's Omnistudio standard runtime certification status in Communications, Media, and Energy (CME) Support for Omnistudio Standard Runtime.

Enable Omnistudio Metadata API Support

To deploy and retrieve Omnistudio standard objects with Salesforce Metadata API, enable the Omnistudio Metadata setting. Until you enable this setting, you can't use Metadata API to deploy Omnistudio components. Future enhancements will depend on this setting and completion of the migration. After this setting is enabled, Omnistudio checks for valid unique names and creates entries for existing components from the standard objects in the Omnistudio configuration tables. Also, for each new component, Omnistudio creates an entry in the Omnistudio configuration tables. Omnistudio Metadata supports OmniProcess (Omniscript and Integration Procedure), OmniDataTransform (Omnistudio Data Mapper), and OmniUiCard (Flexcard) standard objects. This setting doesn't apply to Omnistudio custom objects.

Troubleshooting Errors After Enabling Omnistudio Metadata

If you see an error after enabling the Omnistudio Metadata setting, check for invalid names for components, Omnistudio Data Mapper version numbers, and populated configuration tables.

Disable the Managed Package Runtime and Deploy Custom Lightning Web Components

If you migrate from Omnistudio for Managed Packages to Omnistudio, disable the Managed Package Runtime setting. Before you disable this setting, ensure that all Flexcards and Omniscripts in use that

are key to your business processes are supported in standard objects. If you add or edit an Omniscript or Flexcard after disabling this setting and use custom components to load these Omniscripts or Flexcards in Lightning App Builders and communities, the changes won't be reflected unless you replace them with standard components. To update your existing Flexcards and Omniscripts in Lightning App Builders and communities without using the standard components, enable the Deploy Custom Lightning Web Components setting.

Disable the Managed Package Designer

To use the Omnistudio standard designer in your org, disable the Managed Package Designer setting.

Omnistudio SLDS 2 Theme

Salesforce provides the Salesforce Lightning Design System (SLDS) as a theme that offers resources for building applications consistent with the Salesforce Lightning principles, design language, and best practices. Starting in Spring '25, Salesforce provides the SLDS 2 theme, which is the enhanced version of SLDS with updates to the CSS. With the introduction of the Omnistudio SLDS 2 theme, you can use the advantages of SLDS, SLDS 2, and its enhanced user experience (UI) to improve the UI of your Omnistudio applications at runtime. The Omnistudio SLDS 2 theme fully aligns with the standard SLDS and SLDS 2 theme in your Salesforce org.

Enable Autogenerated Numbers

To set up a numbering system and autogenerate numbers for various use cases, enable the Omni Global Auto Number setting on the Omnistudio Settings page.

Enable Enhanced Runtime Performance of Components

Improve component runtime performance by turning on Enhanced Runtime Performance on the Omnistudio Settings page. This setting ensures that Omnistudio communicates with the Salesforce Platform with in-platform capabilities instead of through Apex calls. It also allows Omnistudio components to be executed in user mode. User mode respects the access levels of the person performing an operation.

Enable Omnistudio Metadata API Support

To deploy and retrieve Omnistudio standard objects with Salesforce Metadata API, enable the Omnistudio Metadata setting. Until you enable this setting, you can't use Metadata API to deploy Omnistudio components. Future enhancements will depend on this setting and completion of the migration. After this setting is enabled, Omnistudio checks for valid unique names and creates entries for existing components from the standard objects in the Omnistudio configuration tables. Also, for each new component, Omnistudio creates an entry in the Omnistudio configuration tables. Omnistudio Metadata supports OmniProcess (Omniscript and Integration Procedure), OmniDataTransform (Omnistudio Data Mapper), and OmniUiCard (Flexcard) standard objects. This setting doesn't apply to Omnistudio custom objects.

Before You Begin

- Make sure that your org uses the standard object model. See Does Your Org Use Custom or Standard Objects? .
- Make sure that your components have valid unique names.
  - When you select the Omnistudio Metadata setting, a process runs that validates your components'

names. If one name is invalid, the setting isn't enabled, and you receive an email.
- The fields used to create uniques must include only alphanumeric characters and can't include spaces or special characters such as underscores. After changing the names, update the references. The fields used to create the unique names vary by component. For more details, see Omnistudio Naming Conventions.

Component	Object	Fields That Create Unique Name
Integration Procedures	OmniProcess	Type + Subtype
Omnistudio Data Mappers	OmniDataTransform	Name
Omniscripts	OmniProcess	Type + Subtype + Language
Flexcards	OmniUiCard	Name

- Verify that the Omnistudio configuration tables have no entries. Records on these objects can prevent the setting from being enabled. Log in to the Developer Console and run a Select query to find any records on the following standard objects. If these objects have records, back up those Omnistudio components by exporting all the records. For example, in the Omniscripts tab, select Type and click Export. Then, manually delete the rows returned from a SOQL query in the Developer Console for the following objects. You can use the backups to restore the components in case they're deleted when the setting is enabled. This scenario is rare.
  - OmniUiCardConfig
  - OmniScriptConfig
  - OmniIntegrationPocConfig
  - OmniDataTransformConfig
- If you're migrating from the custom data model to the standard data model, run the Omnistudio Migration Tool and update references. See Migration Process from Omnistudio for Managed Packages to Omnistudio.

Note The pre-validation run ensures that all data is validated before enabling Metadata API. This process prevents the partial creation of metadata.

Note If you use the Salesforce Industries Communications, Media, and Energy (CME), Insurance, or Public Sector package: Before turning off the Managed Package Runtime setting, verify that the standard runtime supports each component you use. Check each component's Omnistudio Standard Runtime certification status in Communications, Media, and Energy (CME) Support for Omnistudio Standard Runtime.

Warning After you enable this setting, you can't disable it.

Required Versions
Available beginning Spring '22 and later releases for customers on the standard object model.

1. In Setup, in the Quick Find box, enter *Omnistudio Settings* and select **Omnistudio Settings**.
2. Enable **Omnistudio Metadata**.
3. Check your email for confirmation that Omnistudio Metadata is enabled or for notification of errors. If there are errors, the Omnistudio Metadata setting initially appears enabled but is then disabled. See Troubleshooting Errors After Enabling Omnistudio Metadata.
4. To allow users other than admins to create, update, or delete Omnistudio components, enable object permissions in user profiles or permission sets for the Omnistudio configuration BPOs.
   - OmniUiCardConfig
   - OmniScriptConfig
   - OmniIntegrationPocConfig
   - OmniDataTransformConfig

   By default, the standard profile has read-only access.

Troubleshooting Errors After Enabling Omnistudio Metadata

If you see an error after enabling the Omnistudio Metadata setting, check for invalid names for components, Omnistudio Data Mapper version numbers, and populated configuration tables.

Invalid Component Names

For successful migration, the names, types, and subtypes of all Omnistudio components must not have underscores, spaces, or special characters.

- Omniscripts (OmniProcess object)
- Flexcards (OmniUiCard object)
- Data Mappers (OmniDataTransform object)
- Integration Procedures (OmniProcess object)

Data Mapper Version Numbers

Data Mappers don't have version numbers. Open the Data Mappers and ensure they don't have a version number ("1"). If they don't, they aren’t versioned. You can run the following anonymous Apex in the Developer Console to correct this issue.

```
List<OmniDataTransform> allDrsToUpdate = new List<OmniDataTransform>();
for (OmniDataTransform om : [ Select Name, VersionNumber from OmniDataTransfor
m WHERE UniqueName = null ]) {
if (om.VersionNumber == null) {
om.VersionNumber = 1;
}
allDrsToUpdate.add(om);
}
```

```
update allDrsToUpdate;
```

Populated Config Tables

To check whether the configuration tables are populated, run a SOQL query in the Developer Console on the following objects. If any objects return rows, back them up to a file and delete the rows. You can manually delete the rows returned from a SOQL query in the Developer Console.

- OmniUiCardConfig
- OmniScriptConfig
- OmniIntegrationPocConfig
- OmniDataTransformConfig

Deactivate Omniscripts and Flexcards

Deactivate Flexcards and Omniscripts, and then enable the Omnistudio Metadata setting.

Disable the Managed Package Runtime and Deploy Custom Lightning Web Components

If you migrate from Omnistudio for Managed Packages to Omnistudio, disable the Managed Package Runtime setting. Before you disable this setting, ensure that all Flexcards and Omniscripts in use that are key to your business processes are supported in standard objects. If you add or edit an Omniscript or Flexcard after disabling this setting and use custom components to load these Omniscripts or Flexcards in Lightning App Builders and communities, the changes won't be reflected unless you replace them with standard components. To update your existing Flexcards and Omniscripts in Lightning App Builders and communities without using the standard components, enable the Deploy Custom Lightning Web Components setting.

Before you begin:

- Review the phases of the migration process to Omnistudio from Omnistudio for Managed Packages, making sure to confirm support for the features you need in Omnistudio and your Salesforce Industries cloud. See Migration Process from Omnistudio for Managed Packages to Omnistudio.
- If you use the Salesforce Industries Communications, Media, and Energy (CME) package, verify that the standard runtime supports each component you use. Check each component's Omnistudio Standard Runtime certification status in Communications, Media, and Energy (CME) Support for Omnistudio Standard Runtime.

1. In Setup, find and select **Omnistudio Settings**.
2. Disable **Managed Package Runtime**.

   Note After you disable the managed package runtime setting, you shouldn't re-enable it.

Starting with Summer ‘25, when you migrate from the managed package runtime with standard data model to the Omnistudio standard runtime and disable the Managed Package Runtime setting, Omnistudio automatically converts all custom functions in the user-defined syntax to the standard syntax.

3. Redeploy your Flexcards and Omniscripts with a standard runtime wrapper by enabling the **Deploy Custom Lightning Web Components in Standard Runtime** setting.

   Note Standard components should be used whenever possible. Deploying should only be considered as a workaround when you need to update existing components and don’t want to add them as standard components.

   Depending on the number of Flexcards and Omniscripts, this redeployment can take from a few minutes to an hour to complete. To monitor the redeployment, find and select **Deployment Status** in Setup.

See Also

Differences Between Omnistudio and Omnistudio for Managed Packages
Updates to Omnistudio Custom Functions

Disable the Managed Package Designer

To use the Omnistudio standard designer in your org, disable the Managed Package Designer setting.

REQUIRED EDITIONS

Available beginning Spring ’25 and later releases for customers on the standard object model.

Note Starting from Summer '25, if you enable the Omnistudio license that is bundled with Salesforce Industries licenses, the Omnistudio standard designer and standard runtime are available by default. Don't install the Omnistudio package.

Before you begin, make sure you've enabled the standard runtime. See Disable the Managed Package Runtime and Deploy Custom Lightning Web Components.

The standard designer is available to new and existing users by default, depending on the Omnistudio license and version in your Salesforce org. If necessary, you can switch to the managed package designer. However, if you switch to the managed package designer, you can't edit components that are created or modified using the standard designer.

1. In Setup, find and select **Omnistudio Settings**.
2. Turn off the **Managed Package Designer** setting.
   If an Omnistudio component is open in the managed package designer when you switch to the standard designer, an error appears.

Omnistudio SLDS 2 Theme

Salesforce provides the Salesforce Lightning Design System (SLDS) as a theme that offers resources for building applications consistent with the Salesforce Lightning principles, design language, and best practices. Starting in Spring ‘25, Salesforce provides the SLDS 2 theme, which is the enhanced version of SLDS with updates to the CSS. With the introduction of the Omnistudio SLDS 2 theme, you can use the advantages of SLDS, SLDS 2, and its enhanced user experience (UI) to improve the UI of your Omnistudio applications at runtime. The Omnistudio SLDS 2 theme fully aligns with the standard SLDS and SLDS 2 theme in your Salesforce org.

For more information, see Enhanced Lightning User Interface.

Enable the Omnistudio SLDS 2 theme in your Omnistudio org when you're on standard runtime. This theme provides a more consistent and visually appealing UI, optimized for navigation and performance. The updated design includes a simplified color palette, improved fonts, better spacing, and higher contrast.

Starting in Spring ‘25, turn on the Omnistudio SLDS 2 theme for a better UI experience so that your Omnistudio components follow the standard SLDS theme. If you’re activating the SLDS 2 theme in your Salesforce org, and if you want to use the Omnistudio components that adhere to the SLDS 2 theme, you must turn on the Omnistudio SLDS 2 theme.

The Omnistudio SLDS 2 offers these features:

- Modern design elements that include circular motifs, intuitive icons, refreshed typography, and vibrant colors, creating an environment that is both visually appealing and user-friendly.
- Streamlined UI that focuses on simplicity, responsiveness, and usability, helping users navigate Omnistudio more efficiently at runtime.

Enable the Omnistudio SLDS 2 Theme
Enable the Omnistudio SLDS 2 theme in your Omnistudio org when you're on standard runtime.

Enable the Omnistudio SLDS 2 Theme

Enable the Omnistudio SLDS 2 theme in your Omnistudio org when you're on standard runtime.

Note When the Omnistudio SLDS 2 setting is enabled, either alone or in combination with the org-level SLDS 2 (Cosmos) theme, you may encounter display or behavior issues with Select, Lookup, and Typeahead elements under these conditions:

- These elements are used as the last component in an Omniscript.
- The same Omniscript is embedded inside a Flexcard and launched as a flyout.
- These elements are used as the last components in an Edit Block for a modal.

- If you’re on the standard runtime, and building new Omnistudio components that adhere to the

standard SLDS theme:

1. From Setup, in the Quick Find box, find, and select **Omnistudio Settings**.
2. Turn on Omnistudio SLDS 2.

- If you're on the standard runtime, and want to take advantage of the standard SLDS 2 theme for your Omnistudio components:

1. Activate the SLDS 2 theme in your Salesforce org:
   a. From Setup, in the Quick Find box, find, and select **Themes and Branding**.
   b. Verify that the SLDS 2 theme setting is activated. If not, activate it.
2. Turn on the SLDS 2 theme in the same org:
   a. From Setup, in the Quick Find box, find, and select **Omnistudio Settings**.
   b. Turn on Omnistudio SLDS 2.

Enable Autogenerated Numbers

To set up a numbering system and autogenerate numbers for various use cases, enable the Omni Global Auto Number setting on the Omnistudio Settings page.

Before You Begin

- Your org must use the standard data model. The custom object GlobalAutoNumberSetting__c and its records must not be present.
- The RollbackIPChanges and RollbackDRChanges Omni Interaction Configurations must be disabled.
- Create, edit, and delete permissions for the Omni Global Auto Number standard object must be provided for the Omnistudio Admin and User profiles. You can provide access to this object to your users by modifying your permission set, permission set group, or profile set up.

Important Once you enable Global Auto Number, this setting can’t be turned off. You can contact Salesforce Customer Support to disable this setting. However, toggling this setting on and off isn't recommended as this action can cause data inconsistencies.

To enable Omni Global Auto Number, perform these tasks.

1. In Setup, in the Quick Find box, find and select **Omnistudio Settings**.
2. Enable **Omni Global Auto Number**.

Enable Enhanced Runtime Performance of Components

Improve component runtime performance by turning on Enhanced Runtime Performance on the Omnistudio Settings page. This setting ensures that Omnistudio communicates with the Salesforce Platform with in-platform capabilities instead of through Apex calls. It also allows Omnistudio components to be executed in user mode. User mode respects the access levels of the person performing an operation.

Before You Begin

- Make sure that your users have access to the Omni Interaction Access Configuration object. For information on how to do this, see Create a Permission Set for the Enhanced Runtime Performance Omnistudio Setting.
- Make sure that your user accesses are up to date. This setting enforces all components to execute in User Mode. If a user doesn't have the requisite permissions for specific objects or fields, they won't be able to perform key actions. For more information, see Omnistudio Permission Sets.
- Don't enable this setting directly in a production environment. Try it out in a production-like sandbox environment first.

To enable the Enhanced Performance setting, perform these tasks.

1. In Setup, in the Quick Find box, find and select **Omnistudio Settings**.
2. Enable **Enhanced Runtime Performance**.

OmniStudio-First Side-by-Side Package Installation Results

If both OmniStudio Standard and Salesforce Industries packages are installed in that order, both OmniStudio Standard and OmniStudio for Vlocity features are accessible, with a few exceptions.

Note If you installed an Industry package without OmniStudio licenses, installing the OmniStudio package afterward isn't allowed. If you installed an Industry package with OmniStudio licenses, installing the OmniStudio package afterward isn't necessary.

OmniScripts

OmniScripts are accessible in the OmniStudio Standard application suite only.

FlexCards

FlexCards are accessible in the OmniStudio Standard application suite only.

Integration Procedure Batch Actions and Vlocity Scheduled Jobs

Integration Procedures in the OmniStudio Standard package are used. Normally OmniStudio Standard Integration Procedures don't have Batch Actions. However, in this case Batch Actions and the Vlocity Scheduled Jobs they call are available.

Expression Sets and Decision Matrices

OmniScripts and Integration Procedures in the OmniStudio Standard package are used, and they call Expression Sets and Decision Matrices instead of Calculation Procedures and Calculation Matrices.

DataPacks

Users access the OmniStudio Standard DataPack functionality, which handles both OmniStudio Standard objects and Salesforce Industries custom objects.

Tracking Service

If you install the OmniStudio Standard package, then install the Salesforce Industries package, then uninstall the OmniStudio Standard package, you lose all Tracking Service data.

Foundation Document Generation and Contract Lifecycle Management

Selecting either the Vlocity Document Templates or Document Template Designer tab asks you which template type you want to create. You're redirected to the appropriate tab for your choice.

The Vlocity Document Templates tab lets you create Contract Lifecycle Management (CLM) templates, either Web, DOCX, or PPTX. The Document Template Designer tab lets you create Foundation Document Generation templates, either DOCX or PPTX.

If you create a DOCX or PPTX template on the Vlocity Document Templates tab, the Usage Type can only be Contract.

If you want users to create only CLM templates, you can hide the Document Template Designer tab. Go to Omni Interaction Config in Setup and create a setting with DeveloperName = ShowLegacyOmniStudioUi and Value = true.

Show the Legacy Omnistudio UI
If using Omnistudio's legacy Angular UI is necessary to your implementation, turn on the ShowLegacyOmniStudioUi setting. All new implementations should be done using Omnistudio's LWC designers for future support. However, in rare cases, it may be necessary to turn on the legacy designers.

Legacy Omnistudio UI Reference
This reference table shows the functionalities affected by the ShowLegacyOmniStudioUi setting.

Show the Legacy Omnistudio UI

If using Omnistudio's legacy Angular UI is necessary to your implementation, turn on the ShowLegacyOmniStudioUi setting. All new implementations should be done using Omnistudio's LWC designers for future support. However, in rare cases, it may be necessary to turn on the legacy designers.

Before You Begin

View the Legacy Omnistudio UI reference table. See Legacy Omnistudio UI Reference.

1. From Setup, enter *Omni Interaction Configuration* in the Quick Find box, then select **Omni**

Interaction Configuration.
2. Click **ShowLegacyOmniStudioUi**.
3. Click **Edit**.
4. For Value, enter *true*.
5. Click **Save**.

Legacy Omnistudio UI Reference

This reference table shows the functionalities affected by the ShowLegacyOmniStudioUi setting.

Feature	ShowLegacyOmniStudioUi Setting	Designer Availability	AngularJS Runtime	Save/Import Data
Cards (AngularJS)	Off	Hidden	Off	n/a
Cards (AngularJS)	On	Available	On	Custom Object
Flexcards	Off	Available	n/a	Base Platform Object
Flexcards	On	Available	n/a	Base Platform Object
Omniscript (AngularJS)	Off	Hidden	Off	n/a
Omniscript (AngularJS)	On	Available	On	Custom Object
Omniscripts	Off	Available	n/a	Base Platform Object
Omniscripts	On	Available	n/a	Base Platform Object