

Activate and Publish FlexCards



NOTE:

Did you sign up for a [special OmniStudio Developer Edition org](#) already? You'll need one to do the steps in this guide. If not, use the link to fill out the form and have an org delivered to your inbox. The Exercise Guide in the first unit of this module has more detailed steps for this process if you need them.

Requirements

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

Prerequisites

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

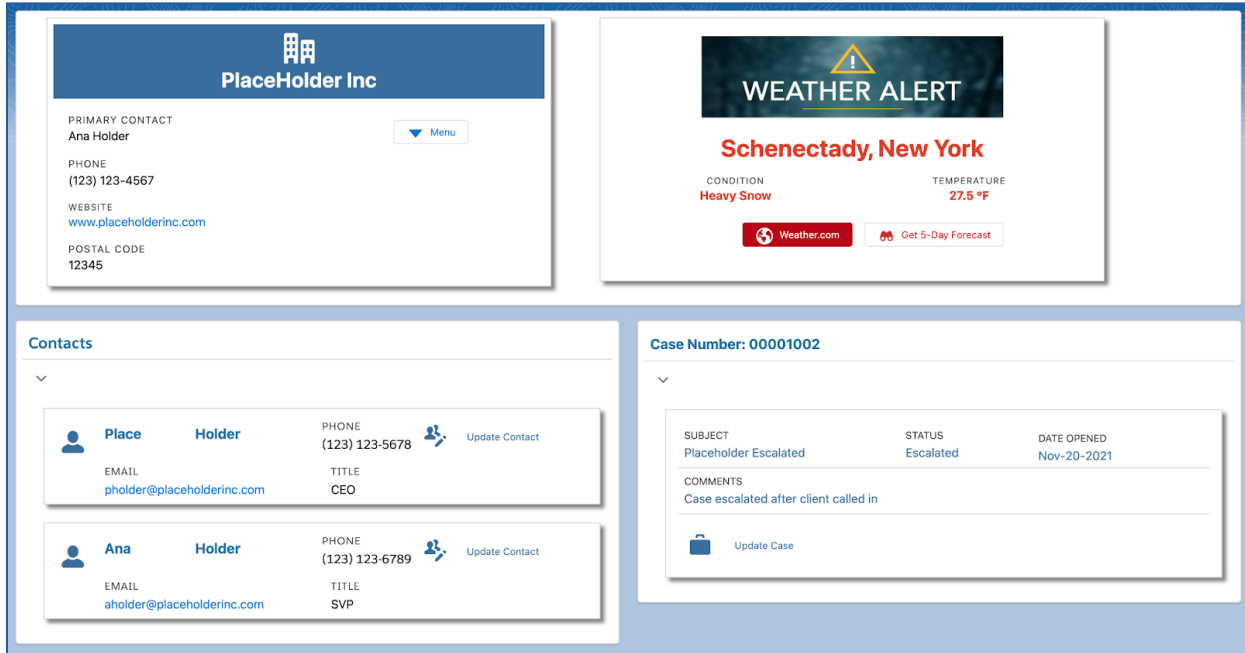
Tasks

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

Time:

- 15 mins

What You Will Build

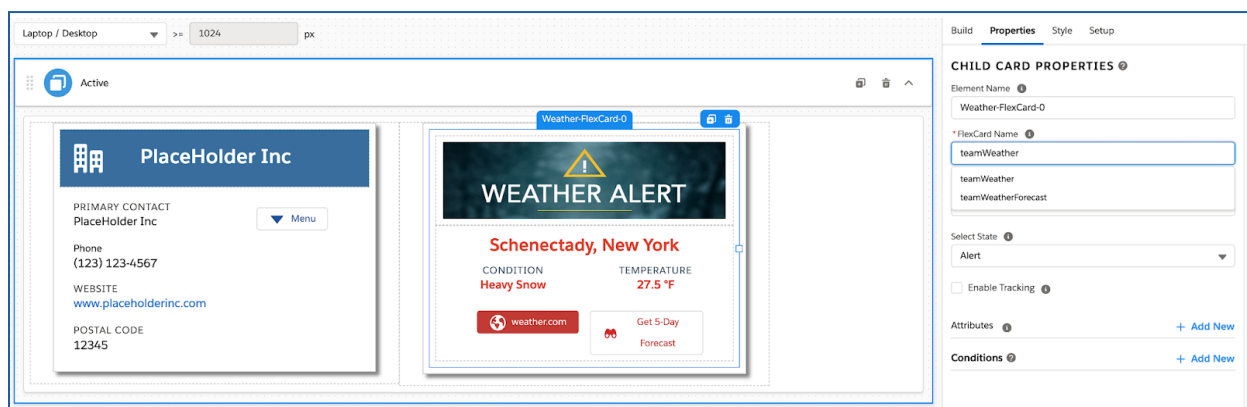


The screenshot displays a FlexCard layout with four main sections:

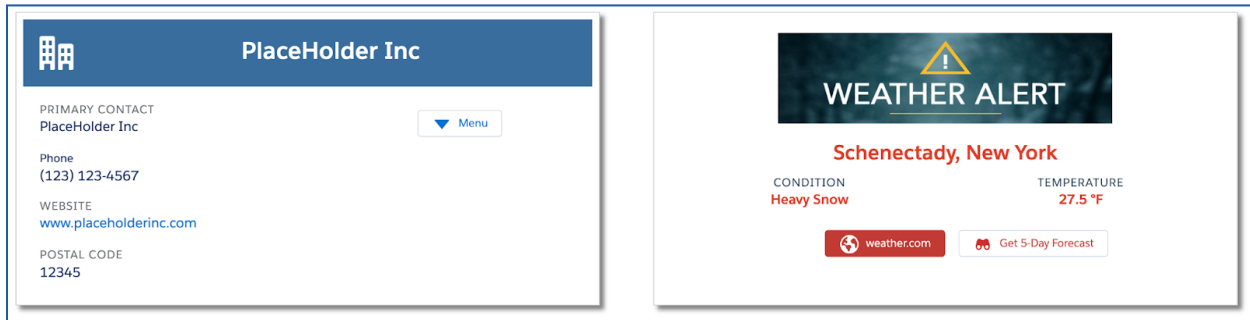
- Company Profile:** Placeholder Inc. Primary Contact: Ana Holder. Phone: (123) 123-4567. Website: www.placeholderinc.com. Postal Code: 12345.
- Weather Alert:** WEATHER ALERT for Schenectady, New York. Condition: Heavy Snow. Temperature: 27.5 °F. Includes buttons for Weather.com and Get 5-Day Forecast.
- Contacts:** A list of two contacts: Place Holder (CEO) and Ana Holder (SVP).
- Case Details:** Case Number: 00001002. Subject: Placeholder Escalated. Status: Escalated. Date Opened: Nov-20-2021. Comments: Case escalated after client called in.

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

1. **Activate** the **teamWeather** FlexCard.
 - a. If needed, open the **teamWeather (Version 2)** FlexCard from the **OmniStudio FlexCards** tab.
 - b. Click **Activate**. You don't need to set Publish Options.
 - c. Click **Done**.
2. Embed the **teamWeather** FlexCard in the **teamAccount** FlexCard.
 - a. Open the **teamAccount** FlexCard from the **OmniStudio FlexCards** tab. If you did not complete the following OmniStudio FlexCards Trailhead practice exercises – **Meet the Data Source Wizard, Display Data and Actions on a FlexCard**, and **Style the Elements on a FlexCard** – search for `sample` and then open **sampleAccountDetails (version 1)**.
 - b. Refresh the page.
 - c. Select the Weather block and go to the **Build** panel.
 - d. Locate the **FlexCard** element and drag it to inside the Weather block.
 - e. In the **Properties** panel, rename it to `Weather Details`
 - f. In the **FlexCard Name** field, select **teamWeather**.



- g. Notice the field **Select State**. Toggle this between the **Active** and **Alert** states to preview both and see what they look like.
- h. Click the **Preview** button in the FlexCard header.



- i. **Activate** the FlexCard.
- j. Click **Publish Options** and make sure **RecordPage**, **AppPage**, and **HomePage** are selected. Click **Save**.


Publish Options

Interface Editor

Master Label	Description
teamAccount	
API Version	Runtime Namespace
51.0	omnistudio

Is Exposed

Add SVG resource / Drop it here

Select SVG 

Targets

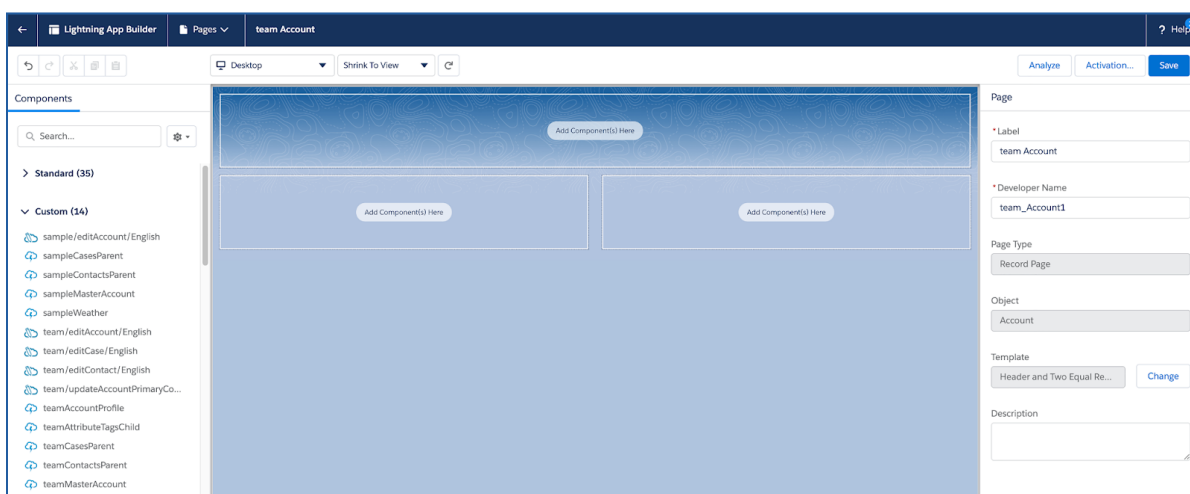
- App Page
- Home Page
- Record Page
- Community Page
- Community Default

Cancel Save

Task 2: Add FlexCards to a Lightning Console

1. Open the **teamAccount** Lightning App Console to edit it.
 - a. Click “Gear” > **Setup**.
 - b. In **Quick Find** enter `app build` in the field to locate and open the **Lightning App Builder**.
 - c. Locate the record page titled **team Account**. Click **Edit**.

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

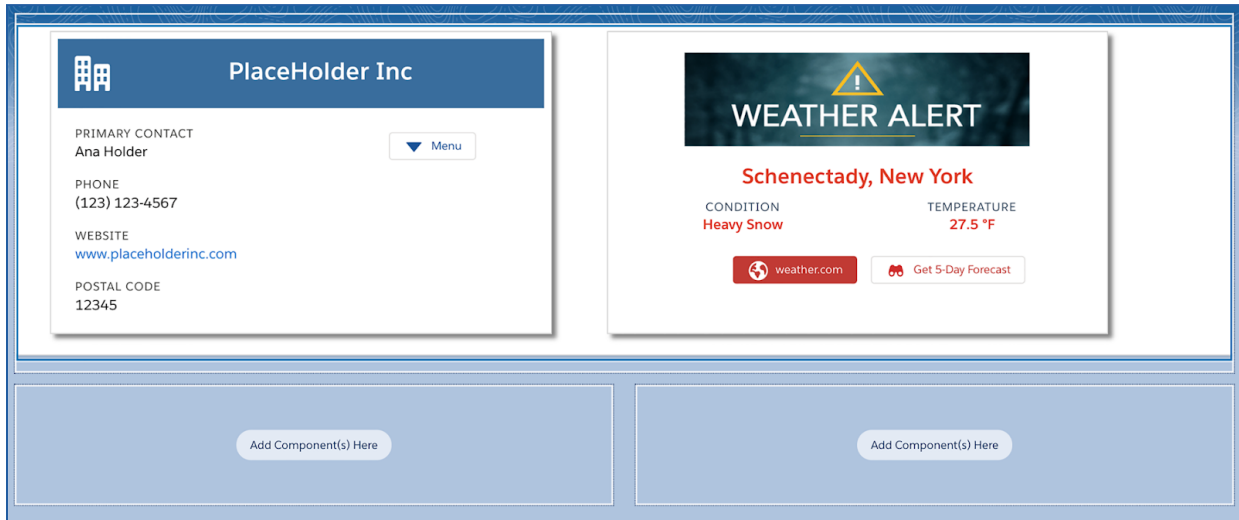


2. Configure the header region.

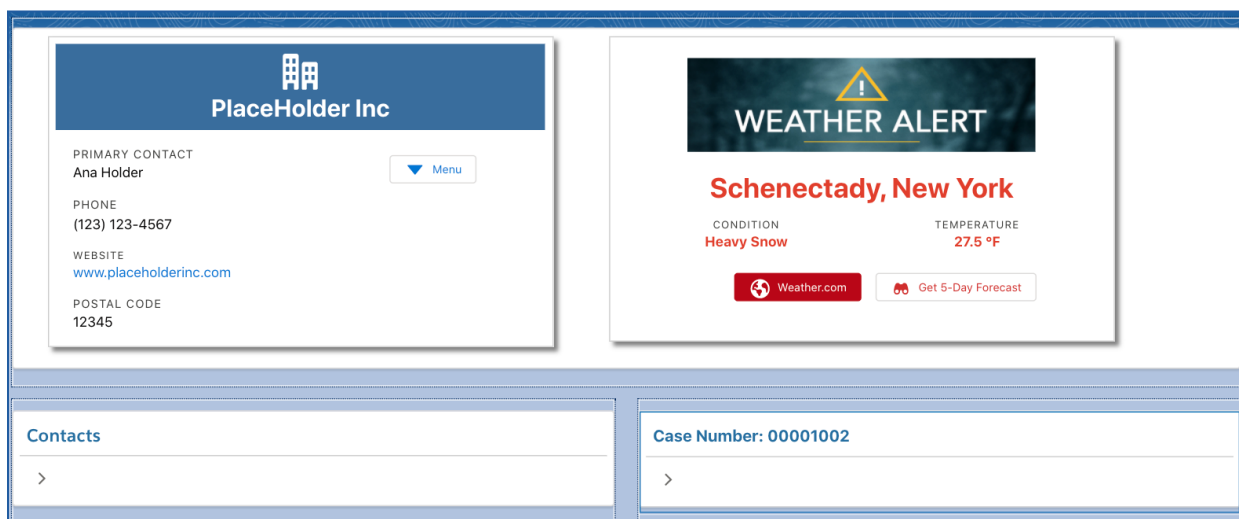
To the left you see lists of lightning components – the **Standard** list, **Custom** and **Custom - Managed**.

The **Custom** components list is where you’ll find the components you created and other components that make up the package. As long as your Lightning web components are active, they appear in the **Custom** list. Because we are using the OmniStudio package with Standard Objects, you also see **Flexcard** and **OmniScript** in the **Standard** list.

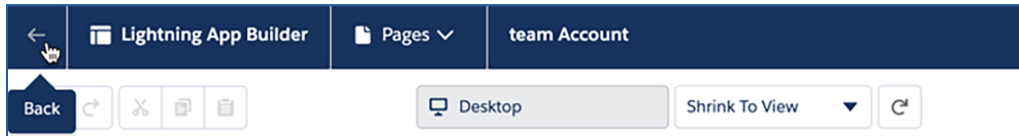
- a. From the **Custom** components list, locate and drag the **teamAccount** or **sampleAccountDetails** component to the header region (if you do not see them, enter `team` to search).



3. Configure the left & right regions.
 - a. From the **Custom** components list, locate and drag the **teamContactsParent** component to the left region.
 - b. From the **Custom** list of components, locate and drag the **teamCasesParent** component to the right region.



4. Save the page and test the new OmniStudio Console app.
 - a. Click **Save**.
 - b. Click the **Back** button, which is a left arrow.



- c. From the App Launcher, go to **OmniStudio Console**.
- d. Select **All Accounts** for the view, then select **Acme** and you see the page with your FlexCards. The record page you created is now the default page for any account.
- e. Expand the Contacts block and the Case block.

