

Add FlexCard States and Conditions

NOTE:

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

Requirements

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

Create a new FlexCard State to alert users when there is a hazardous weather condition (Heavy Snow) present at a location.

Prerequisites

• Build a FlexCard with External Data

Tasks

- 1. Create a New Weather Alert State
- 2. Configure the Alert State

Time

• 15 mins

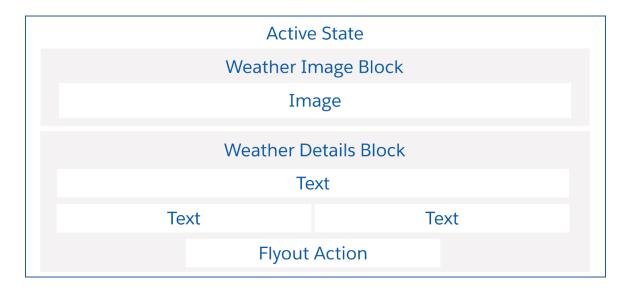


What You Will Build

| Alert (Condition == Heavy Snow) | | D 🕆 🔨 |
|---------------------------------|------------------------------------|------------------------|
| | WEATHER ALERT | |
| | Schenectady, New York | |
| CONDITION Heavy Snow | | TEMPERATURE 27.5 °F |
| | 🚱 weather.com 🕅 Get 5-Day Forecast | |
| Active | | ■ ↑ ∧ |
| | | |
| | Schenectady, New York | |
| CONDITION Heavy Snow | | TEMPERATURE 27.5 °F |
| | 💏 Get 5-Day Forecast | |



| Alert StateWeather Image BlockImageWeather Details BlockText |
|--|
| Image Weather Details Block Text Text |
| Weather Details Block Text Text |
| Text Text |
| Text Text |
| |
| Navigate Action Flyout Action |
| , , , , , , , , , , , , , , , , , , , |



Task 1: Create a New Weather Alert State

- 1. Create a new version of the teamWeather FlexCard.
 - a. Open the **teamWeather (Version 1)** FlexCard from the **OmniStudio FlexCards** tab.
 - b. Click **New Version** in the header. Notice the **Current Version** increments to **2** in the header.



- 2. Create and configure a new state in the Weather card.
 - a. **Clone** the Active state.
 - b. A window appears. Name the new state Alert.

| | Cloned From - | Is Child Card | Last Modified 11/5/2020, 11:59 AM | Theme Lightning | Description - | | × |
|---|------------------|----------------|--------------------------------------|--------------------|------------------|------|------|
| | Clone St | ate | | | | | F |
| I | Blank Card Sta | ate | | | | | Sea |
| | • Name Alert | | | | | |)s |
| | Conditions | | | | | | IEN. |
| | + Add Condit | tion 🚺 + Add G | roup | | | | |
| | | | | | Cance | Save | |
| | Sch | onoctad | W Now York | | | | |

c. Click + Add Condition and configure it. Enter values in the fields as follows:

| Property | Value |
|------------|------------|
| Data Field | Condition |
| Operator | = |
| Value | Heavy Snow |



| Clone State | | | | | |
|----------------------|-------------|------------|------------|--------|------|
| Blank Card State | | | | | |
| • Name | | | | | |
| Alert | | | | | |
| Conditions | | | | | |
| Data Field 🕕 | | Operator 🕕 | Value 🕕 | | |
| Q Condition | • | = • | Heavy Snow | | â |
| + Add Condition () + | Add Group 🕚 | | | | |
| | | | | Cancel | Save |

- d. Click Save.
- e. The new Alert state appears below the Active state. Notice the header shows the condition that you configured.

| Active | 副・高・ヘ |
|---------------------------------|---|
| | |
| CONDITION Heavy Snow | ndy, New York TEMPERATURE 27.5 °F |
| Ge | t 5-Day Forecast |
| Alert (Condition == Heavy Snow) | |



Task 2: Configure the Alert State

What You Will Build



- 1. Expand the **Alert** state.
- 2. Change the image to a weather alert image.
 - a. Select the image.
 - b. Click the magnifying glass next to the **Image Source** field.
 - c. Start typing weather and select weatherbannerAlert (Version:1).
 - d. Click Save.



| Alert (| (Condition == Heavy Snow) | 6 |) 💼 | ^ |
|---------------------------------------|---------------------------|------------------------|-----|---|
| · · · · · · · · · · · · · · · · · · · | | | | |
| | | VEATHER ALERT | | |
| | Sc | henectady, New York | | |
| | CONDITION Heavy Snow | TEMPERATURE 27.5 °F | | |
| · · · · · · · · · · · · · · · · · · · | | Get 5-Day Forecast | | |

- 3. Configure the fields in the Weather Details block for the **Alert** state.
 - a. Select the **Header CityState** block.
 - b. Highlight the {CityState} merge field and set the font color to **Red** using the **More** menu.

| Build | Properties | Style | Setup | | | |
|----------|---|--------------|------------|----|--|--|
| Elemen | TEXT PROPERTIES @ Element Name ① Header CityState | | | | | |
| 5 | ♂ Fields | Sty | les 🔻 | •• | | |
| Sal | esforce Sans | v 28p | x v | · | | |
| в | I U S | • = | ≡ ≡ | | | |
| ≡ | ▼ 1Ξ ▼ 0 | ≡ + ≡ | <u>A</u> - | • | | |
| <u> </u> | | | | | | |
| [0[V] | | | | | | |
| | | | | | | |
| | | / | æ | | | |

- c. Change the **{Condition}** merge field to **Red** font color. Don't change the label's font color.
- d. Change **{TempF} °F** (or {TempC} °C) merge field to **Red** font color. Don't change the label's font color.



| Alert (Condition == Heavy Snow) | ē) ÷ | ^ |
|---------------------------------|------------------------|---|
| | | |
| | Schenectady, New York | |
| CONDITION Heavy Snow | TEMPERATURE 27.5 °F | |
| | Get 5-Day Forecast | |

- 4. Add an action that navigates users to an outside site.
 - a. Select the Get 5-Day Forecast action. Clone it.
 - b. Select the clone and rename it. Change the **Element Name** in the **Properties** panel to Navigate Action
 - c. Move it to above the Forecast action.
 - d. Fill the rest of the fields as follows:

| Property | Value | Tips |
|---|---------------------|--|
| Label | weather.com | |
| Icon | action:web_link | |
| Display As Button Under Display As Button | ✓ Destructive | |
| Action Type | Navigate | |
| Target | Web Page | |
| URL | https://weather.com | To ensure accuracy for the URL, open the target in a new tab or window and |



copy and paste from the address bar. (Be sure to replace the /apex/ preview text when you paste the URL in).

| Schene | ctady, New York |
|-------------------------|------------------------|
| CONDITION Heavy Snow | TEMPERATURE 27.5 °F |
| | Get 5-Day Forecast |

New Tab/Window

- 5. Style the navigate action.
 - a. Go to the **Style** panel.

Open Target In

- b. Scroll to the **ACTION** section and locate the Color field for the **Label**. Change it from blue to white. Enter #FFFFFF in the field.
- c. Locate the Color field for the **Icon** and change it to white. Enter **#FFFFF** in the field.
- d. Scroll to **DIMENSIONS**. Set the width to **6**.
- e. Scroll to ALIGNMENT. Add an x-Small Right margin.
- f. Set the Text Align to **Right**.
- 6. Style the Get 5-Day Forecast action button with the alert styling.
 - a. Select the Get 5-Day Forecast action button.
 - b. In the **Properties** panel under **Attributes** change the button styling to **Text Destructive**.

[©] Copyright 2021 Salesforce.com, inc. All rights reserved.



- c. Go to the **Style** panel.
- d. Scroll to the ACTION section and locate the Color field for the Label. Change it to #D02D2D.
- e. Locate the Color field for the Icon and change it to #D02D2D.
- f. Scroll to **DIMENSIONS**. Set the width to **5**.
- g. Scroll to ALIGNMENT. Add an x-Small Left margin.
- h. Set the Text Align to Left.

| Alert (Con | dition == Heavy Snow) | | |
|---------------------------------------|-------------------------|------------------------|-----------------------------|
| | | \wedge | |
| | WEAT | HER ALERT | |
| · · · · · · · · · · · · · · · · · · · | Schenec | tady, New York | |
| | CONDITION Heavy Snow | TEN | IPERATURE 27.5 °F |
| | S weather | com Get 5-Day Forecast | |

7. Align and preview the Alert State.

At runtime the first state from top to bottom that meets the condition will display. For this to work, the default condition must always be at the bottom of the Canvas. The Active state is the default condition, but is currently at the top of the Canvas.

a. Collapse both states.

| Laptop / Desktop v >= 1024 px | | | |
|---------------------------------|---|---|---|
| Active | đ | â | ~ |
| Alert (Condition == Heavy Snow) | đ | 合 | ~ |



b. Move the **Alert** state to above the **Active** state using the icon to the far left of the **Alert** state.

| | Active | Ð | 亩 | \sim |
|---|---------------------------------|---|---|--------|
| 0 | Alert (Condition == Heavy Snow) | Ð | 亩 | \sim |
| 0 | Alert (Condition == Heavy Snow) | Ð | ÷ | \sim |

| Alert (Condition == Heavy Snow) | đ | ⊜ | ~ |
|---------------------------------|---|---|---|
| Active | đ | ☆ | ~ |

BEST PRACTICE:

The FlexCard determines which state to display by going from top to bottom. The first state that has true conditions displays. It's best practice to always have a FlexCard state at the bottom that has no conditions (in the example above, this is the Active state). This becomes the default FlexCard state when none of the conditions are met.

c. Click **Preview** to see the Alert state.

