

Before You Begin

Did you sign up for a special OmniStudio Developer Edition org already? You'll need one to do the steps in this guide. Here's how to request one if this is your first time completing an OmniStudio module:

1. Sign up for a [free Developer Edition org with OmniStudio](#).
2. Fill out the form.
 - a. For Email, enter an active email address.
 - b. For Username, enter a username that looks like an email address and is unique, but it doesn't need to be a valid email account (for example, yourname@omnistudiotrails.com).
 - c. After you fill out the form, click **Sign me up**. A confirmation message appears.
3. When you receive the activation email (this might take about 10 minutes), open it and click **Verify Account**.
4. Complete your registration by setting your password and security challenge question.
Tip: Write down your username, password, and login URL for easy access later.

You are logged in to your Developer Edition and you can begin practicing.

Build Simple Integration Procedures

Requirements

“As a user, I'd like the OmniScript that allows me to update basic account details to be able to extract the data from Salesforce and save any updated data back into Salesforce.”

Build the Integration Procedure that extracts Account data from Salesforce into the Edit Account OmniScript. Then, build another Integration Procedure that allows you to save updated data from the OmniScript back to Salesforce.

Prerequisites

- None

Tasks

1. Build an Integration Procedure to Get Data for the Edit Account OmniScript
2. Build an Integration Procedure to Save Updated Data from the Edit Account OmniScript

Time

- 20 mins

Task 1: Build an Integration Procedure to Get Data for the Edit Account OmniScript

1. Create a new version of an existing Integration Procedure.
 - a. Open the **App Launcher**, then select the **OmniStudio** app.
 - b. From the dropdown, select **OmniStudio Integration Procedures**.
 - c. Type `team` into the search text box.
 - d. Open **team/getAccountDetails > Team Stub Get Account Details (Version 1)**.
 - e. Click **Create Version** to preserve the version with stub details.
 - f. Edit the name to remove **Stub**. The new name is **Team Get Account Details (Version 2)**.
 - g. Delete the Set Values element.
2. Link the Get Account Details Integration Procedure to the sampleGetAccountDetails DataRaptor.
 - a. Drag a **DataRaptor Turbo Action** component into the STRUCTURE panel, immediately below the **Procedure Configuration** element.
 - b. Fill in the fields as follows:

Property	Value
Element Name	DRGetAccountDetails
DataRaptor Interface	sampleGetAccountDetails

- c. In the **INPUT PARAMETERS** table, click + **Add Input Parameter** and fill in the fields as follows:

Property	Value	Notes
Data Source	AccountId	You may see suggestions for this value, but you must enter it yourself.
Filter Value	AccountId	

- d. In **SEND/RESPONSE TRANSFORMATIONS**, enter `Account | 1` in the **Response JSON Path**.

DataRaptor Turbos return data in a nested array, no matter how many entries. The Response JSON Path field allows you to trim the response from the DataRaptor. Using `Account|1`, you identify the Object node (Account) and identify the correct instance in the array (1).

- e. Click **PREVIEW**.
- f. Click + **Add New Key/Value Pair** and enter the following:

Property	Value
Key	AccountId
Value	[Acme's AccountId]



NOTE:

If you don't already have it, locate Acme's Record Id as follows:

1. Select **Accounts** from the Object dropdown.
2. If needed, switch the view to **All Accounts**.
3. Click **Acme** to view Acme's detail page.
4. Copy the RecordId from the URL (Account Ids always begin with 001, Contact Ids with a 003) and paste it somewhere to use it again.
5. Return to the DataRaptor and paste the RecordId into the **Value** field.

- g. Click **Execute**. (You need to scroll down to see the button).

- h. Under **Debug Log**, select **DRGetAccountDetails** from the dropdown and confirm you see Acme's information. The DataRaptor is now connected to the Integration Procedure.



NOTE:

In the Debug Log dropdown, **Original Input** is what you expect to pass to the Integration Procedure. **Debug Log** would allow you to work through and identify any issues with the output and the input for each element. In addition, there are two entries for each component. The first, **NAME**, displays the output. The second, **NAMEDebug** shows the input for the step. If you don't see expected outputs, you can review the debug entry to help find out what is wrong with the input data

3. Tell the Integration Procedure what data to send back to the Edit Account OmniScript.
 - a. Click **PROPERTIES**.
 - b. Click on the Response Action element **ResponseAction** in the STRUCTURE panel.
 - c. Under **SEND/RESPONSE TRANSFORMATIONS**, in the **Send JSON Path** field, replace **SetValues** with `DRGetAccountDetails`.



▼ SEND/RESPONSE TRANSFORMATIONS

Send JSON Path ⓘ	Send JSON Node ⓘ
<input type="text" value="DRGetAccountDetails"/>	<input type="text"/>
Response JSON Path ⓘ	Response JSON Node ⓘ
<input type="text"/>	<input type="text"/>

- d. Click **PREVIEW > Execute**.
- e. Confirm the **Response** section displays Acme's Account information.
- f. Click **PROPERTIES**.
- g. Click **Procedure Configuration > Activate Version**.

4. Confirm the Get Account Details Integration Procedure is working in the Edit Account OmniScript.
 - a. From the dropdown, select the **OmniScripts** tab.
 - b. Search for sample and select the **sample/editAccount Omniscrypt > Sample Edit Account (Version 1)**.
 - c. Click **IPGetAccountDetails** on the Canvas and edit the **Integration Procedure** field under the **Properties** tab to *team_getAccountDetails*.
 - d. Click **Preview** in the Header.
 - e. Paste the **Acme Account Record Id** into the **Context ID** field and click **Refresh**.
 - f. Confirm the account details for Acme populate in the preview screen and JSON.

Task 2: Build an Integration Procedure to Save Updated Data

1. Create a DataRaptor to use in the Integration Procedure.
 - a. From the dropdown, select **OmniStudio DataRaptors**.
 - b. From the header, click **New**.
 - c. Enter the fields as follows:

Field	Value
DataRaptor Interface Name	teamSaveAccountDetails
Interface Type	Load

- d. Leave the other fields as is and click **Save**.
- e. On the **Objects** sub-tab, click + **Add Object** > **Account**.
- f. Click the **Fields** sub-tab.
- g. Click the grey + to add a mapping and repeat as needed to create the following mappings: +

INPUT JSON PATH	DOMAIN OBJECT FIELD
AccountId	Id
Phone	Phone
Website	Website



NOTES:

- Account Name isn't editable in the OmniScript, so no need to include it in the DataRaptor mappings. There will be no edits to save.
- To create the Input JSON Path, you might have to click + Add 'FIELDNAME' from the dropdown.

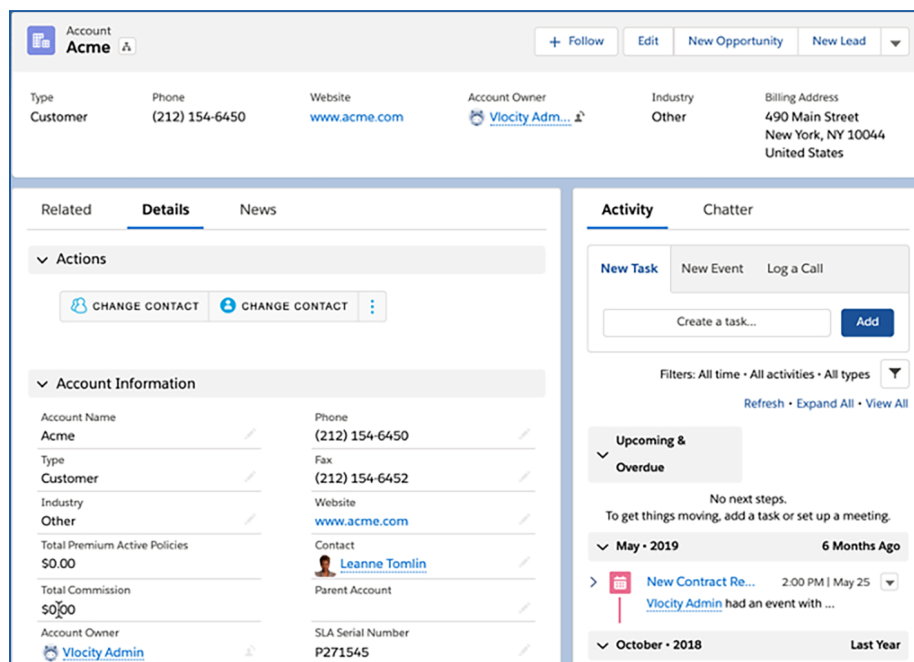
2. Create a new version of an existing Integration Procedure.
 - a. From the dropdown, select **OmniStudio Integration Procedures**.
 - b. Search for `team` and open the **team/saveAccountDetails > Team Starter Save Account Details (Version 1)** Integration Procedure.
 - c. Create a new version.
 - d. Edit the name to remove **Starter** from the name. The new name is **Team Save Account Details**.

3. Configure the DataRaptor Post Action to save the data sent from the OmniScript.
 - a. Drag a **DataRaptor Post Action** into the **STRUCTURE** panel (below **Procedure Configuration**).
 - b. In the **Element Name** field, enter `DRSaveAccountDetails`.
 - c. Click **DataRaptor Interface** and select **teamSaveAccountDetails** from the dropdown. (If you do not see it, refresh your screen and try again.)
 - d. Under **SEND/RESPONSE TRANSFORMATIONS > Send JSON Path** enter `StepAccount`.
 - e. Under **ADDITIONAL INPUT/OUTPUT/FAILURE RESPONSE > Additional Input** click **Add Key/Value Pair** and add `AccountId` in the left key field and `%Id%` in the right value field.

The JSON from the OmniScript carries the AccountId in the root of the JSON and the fields in the StepAccount node. With these edits you are telling the Integration Procedure to trim the JSON to only send the values in the StepAccount node and in addition to send the Id, identifying it as the AccountId.

- f. Click **Procedure Configuration** and **Activate Version** to activate the Integration Procedure.

4. Confirm the active Integration Procedure is connected to your OmniScript.
 - a. Return to the **sample/editAccount>Sample Edit Account (Version 1) OmniScript** tab and refresh the screen.
 - b. Click **IPSaveAccountDetails** on the Canvas and edit the **Integration Procedure** field under the **Properties** tab to *team_saveAccountDetails*.
 - c. Click **Preview** in the Header.
 - d. If needed, paste **Acme's RecordId** into the **Context ID** field.
 - e. Click **Refresh**.
 - f. Edit either the website address or the phone number.
 - g. Click **Next**.
 - h. Click on the browser tab where Acme's information displays.
 - i. Refresh the browser page (F5 or reload the page) and confirm the edit you made displays.



The screenshot shows the Salesforce interface for an Account record named 'Acme'. The record is of Type 'Customer' and is owned by 'Vlocity Admin'. Key details include: Phone: (212) 154-6450; Website: www.acme.com; Industry: Other; Billing Address: 490 Main Street, New York, NY 10044, United States. The 'Details' tab is active, showing 'Actions' with 'CHANGE CONTACT' buttons and 'Account Information' with fields for Account Name, Type, Industry, Total Premium Active Policies, Total Commission, Account Owner, Phone, Fax, Website, Contact (Leanne Tomlin), Parent Account, and SLA Serial Number. The 'Activity' tab is also visible, showing a 'New Task' section with a 'Create a task...' input and an 'Add' button, and a list of activities for May 2019, including a 'New Contract Re...' event on May 25.

5. Activate the OmniScript.
 - a. Click **Activate Version**.
 - b. Click **Done**.

Challenge: Build Additional Integration Procedures

Solidify what you learned when you created the Integration Procedures for the Edit Account OmniScript. We've summarized the requirements; refer to the step-by-step instructions above if you get stuck.

Build an Integration Procedure to extract data from the Contact object, and build an Integration Procedure to save the updated Contact data back into Salesforce.

1. Version and edit the **Team Stub Get Contact Details** Integration Procedure to use the **sampleGetContactDetails** DataRaptor.
 - Use ContactId for the Input Parameters Data Source and Filter Value.
 - Update the Send JSON Path in the Response action.
 - To preview, locate the recordId for Leanne Tomlin's contact record.
 - Don't forget to activate the new version of the Integration Procedure.
 - Test the new version in the **sample/editContact** OmniScript. Make sure to replace the Integration Procedure in the Integration Procedure action element first.
2. Version and edit the **Team Starter Save Contact Details** Integration Procedure to use the **sampleSaveContactDetails** DataRaptor Load to save data from the **sample/editContact** OmniScript.
 - Test the Integration Procedure using the Edit Contact OmniScript Preview. Make sure to replace the Integration Procedure in the Integration Procedure action element first.

Build an Integration Procedure to extract data from the Cases object, and build an Integration Procedure to save the updated Cases data back into Salesforce.

1. Version and edit the **Team Stub Get Case Details** Integration Procedure to use the **sampleGetCaseDetails** DataRaptor.
 - Use CaseId for the Input Parameters Data Source and Filter Value.
 - Update the Send JSON Path in the Response action.
 - To preview, locate the recordId for case number 00001026.
 - Don't forget to activate the new version of the Integration Procedure.
 - Test the new version in the **sample/editCase** OmniScript. Make sure to replace the Integration Procedure in the Integration Procedure action element first.
2. Version and edit the **Team Starter Save Case Details** Integration Procedure to use the **sampleSaveCaseDetails** DataRaptor Load to save data from the **sample/editCase** OmniScript. Test the Integration Procedure using the Edit Cases OmniScript Preview. Make sure to replace the Integration Procedure in the Integration Procedure action element first.