


Before You Begin

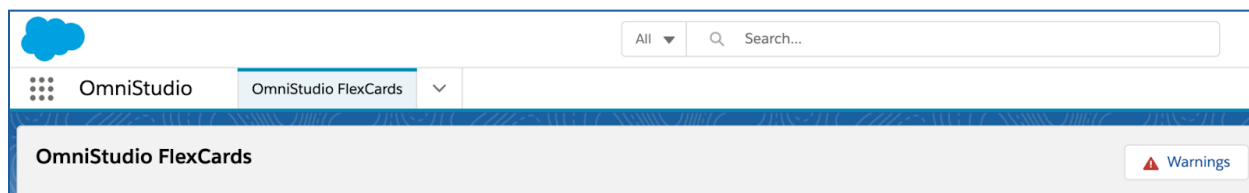
Did you sign up for a special OmniStudio Developer Edition org already? You'll need one to do the steps in this guide. Here's how to request one if this is your first time completing an OmniStudio module:

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.

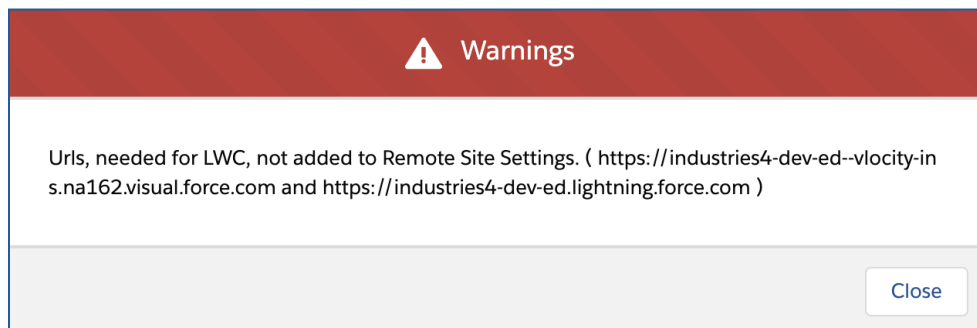
You are logged in to your Developer Edition and you can begin practicing.

Set Up Remote Site Settings for FlexCards

1. Click the App Launcher , and then select the **OmniStudio** App.
2. Click the “**Gear**” icon to go to **Setup**. This opens a new tab.
3. Return to the previous tab, open the dropdown menu, and select **OmniStudio FlexCards**.



4. Click **Warnings**. The Warnings message displays, showing the URLs needed in Remote Site Settings for Lightning web components to work correctly in FlexCards.



5. Return to the Setup browser tab. In the **Quick Find** box, search for `Remote Site Settings` and click to open it.
6. Return to the tab with the Warnings message and copy the URL ending in **lightning.force.com**.
7. In the Remote Site Settings tab, click **Edit** next to the Remote Site ending in **lightning.force.com**.
8. Paste the URL you copied over the URL in the **Remote Site URL** field, then click **Save**.
9. Click **Remote Site Settings** to return to the list.
10. Click **Edit** next to the Remote Site ending in **visual.force.com**.
11. Return to the tab with the Warnings message and copy the URL ending in **visual.force.com**. Copy the URL.
12. Paste the URL you copied over the URL in the **Remote Site URL** field, then click **Save**.
13. Return to the tab with the Warnings message. Close the modal window and refresh the tab. The **Warnings** button is now gone.

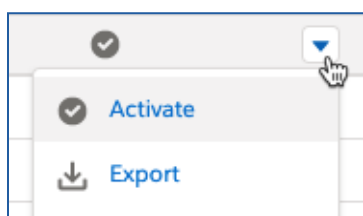
Update Session Settings

1. Return to the browser tab with **Setup** open.
2. In the **Quick Find** enter `session` and select **Session Settings**.
3. Scroll up the page and clear the checkbox next to **Use Lightning Web Security for Lightning web components**. (The checkbox should be blank.)
4. Scroll back down and click **Save**.

Deploy OmniScripts

1. From the OmniStudio app, open the Object dropdown menu and select **OmniScripts**.
2. Activate the following OmniScripts: **team/editAccount**, **team/editContact**, **team/editCase**, and **team/updateAccountPrimaryContact**.

You can activate the OmniScript without opening it by first expanding it, clicking the arrow to the far right of the row with the starter version, and then selecting **Activate>OK**.



Build a FlexCard with External Data 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 FlexCard that displays the current weather using a data source outside of Salesforce. Then add a flyout action to display 5-day weather forecast data in a datatable.

Prerequisites

- None

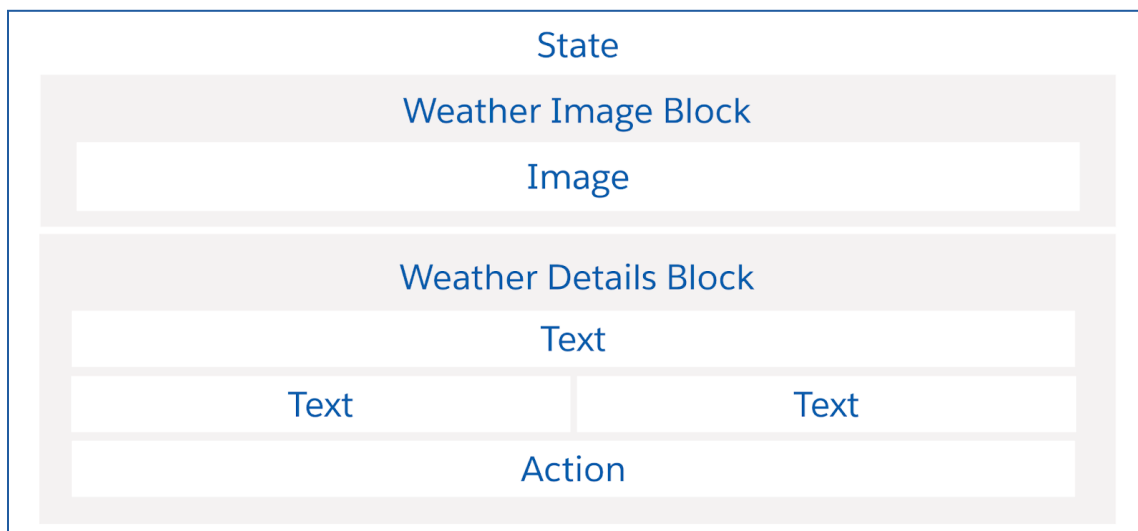
Tasks

1. Configure the Data Source for the Weather Child FlexCard
2. Add and Style an Image Element
3. Create a Child FlexCard with a Datatable for Forecast Data
4. Configure the Flyout Action for the 5-Day Forecast

Time

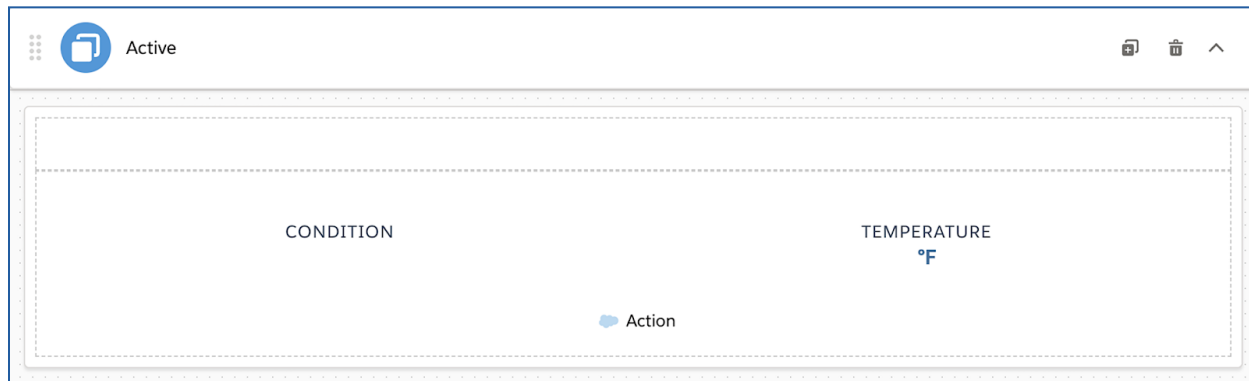
- 25 mins
-

What You Will Build



Task 1: Configure the Data Source for the Weather Child FlexCard

1. Create a child FlexCard for the weather.
 - a. In the **OmniStudio FlexCards** tab, type `team` in the Search bar.
 - b. Locate **teamStarterWeather (version 1)** and open it. The data source, image, and flyout action have not been completed, but the elements have been styled already by the team.



- c. Click **Clone** to clone and rename the FlexCard.
 - d. Rename it to `teamWeather`. Click **Clone**.
 2. Select and configure the data source.
 - a. Go to the **Setup panel** and note **OmniScript Support** is selected. This means the card can be embedded in an OmniScript.
 - b. Scroll to **DATA SOURCE**.
 - c. Select **Integration Procedures** as the Data Source Type.
 - d. In the **Name** field, select **team_getWeatherDetails**.
 - e. Click **+ Add New** under **Input Map** (do this twice) and enter the following variables:

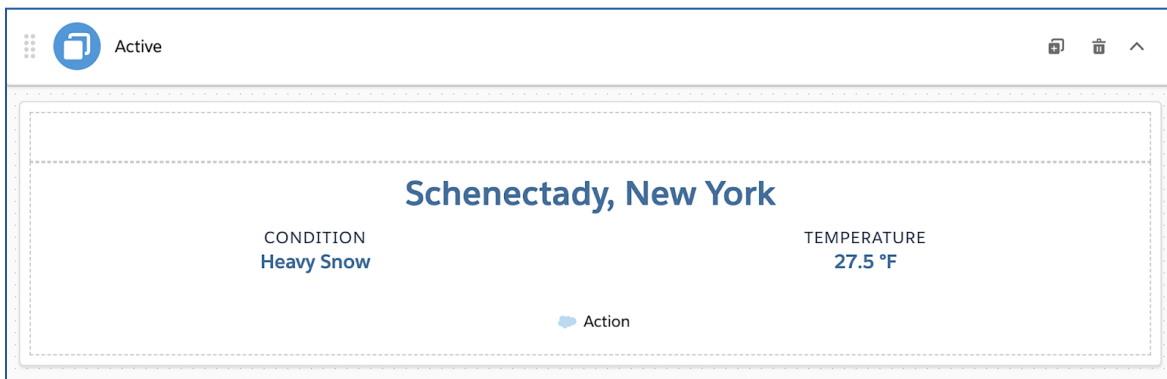
Key	Value
Days	5
AccountId	{recordId}

3. Confirm the stub weather data is entering your JSON.
 - a. Click the **Save & Fetch**. Go to the JSON tab.
 - b. Confirm the data has two different nodes: A Forecast node with date, condition, Hi/Lo Temp in °F and °C, and a Current node with condition, City/State and Temp °F and °C.



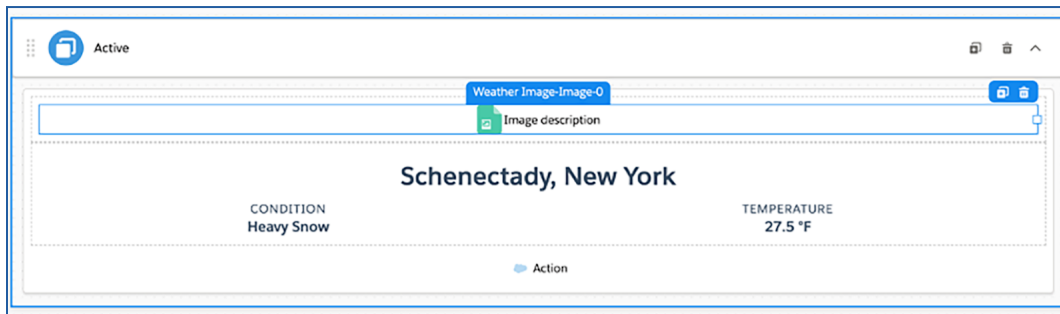
NOTE: The FlexCard the team made is set to Fahrenheit. If you prefer using Celsius, select the **Temperature** field and change it in the **Properties** panel.

4. Trim the JSON node to only provide the current weather data to the card.
 - a. Click **OK**.
 - b. In the **Result JSON Path** field, select [**“Current”**].
 - c. Click **Save & Fetch** again and verify you only see the Current node with the current weather stub data.
 - d. Click **OK**.
 - e. The fields on the canvas are now populated with the stub data.



Task 2: Add and Style an Image Element

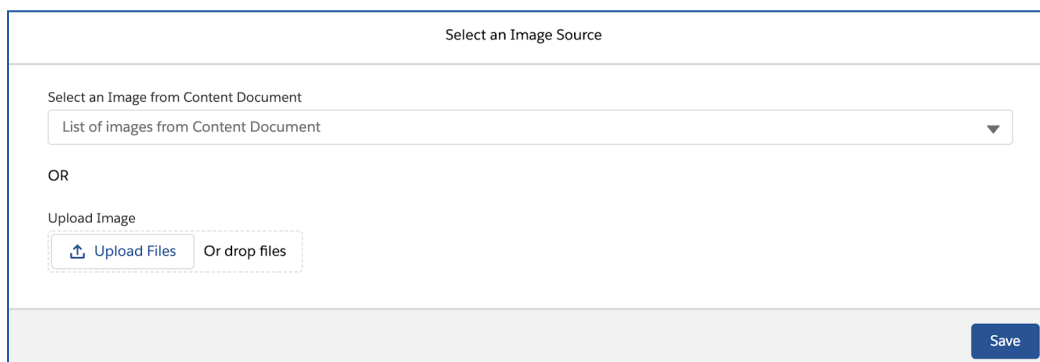
1. Add an **Image** element using a URL.
 - a. Select the **Weather Image** block in the canvas. It's above the weather data you just populated.
 - b. Go to the **Build** panel and drag an **Image** element to the Image block.



- c. While in the **Properties** panel, locate the **Image Source** field. Read the tooltip. Clicking the magnifying glass opens the Image Source window.

You can upload an image, select an image from your org's libraries, or enter the URL of an image. Uploaded images are saved to your org's library of documents for reuse.

- d. Click the magnifying glass next to the **Image Source** field.
- e. Click in the field **Select an Image from Content Document**.



- f. Select **weatherbannerActive (Version:1)** from the list.

- g. Click **Save**.
- h. Change the image **Size** to **Large**.
- i. Click **Preview**.



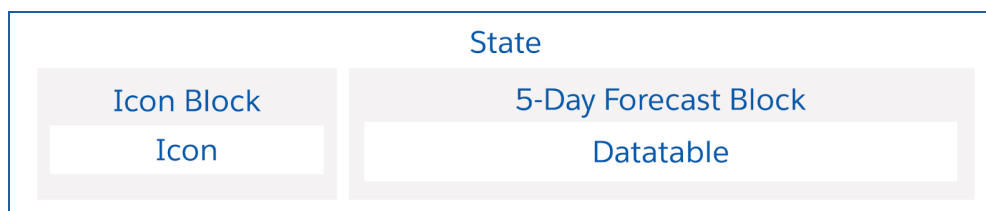
The remaining element in this FlexCard is for the flyout action. Leave this alone for now, you'll come back to it after you create the flyout FlexCard, which is next.

What You Will Build



Task 3: Create a Child FlexCard with a Datable for Forecast Data

You'll now create the child FlexCard to enter in the Flyout field in the teamWeather FlexCard.



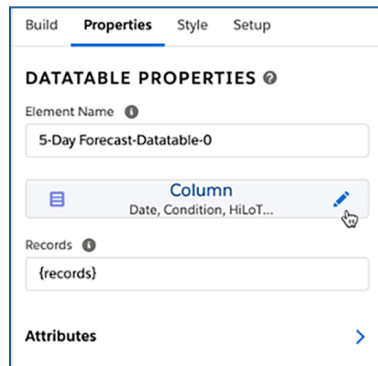
1. Create a new child FlexCard.
 - a. In the **OmniStudio FlexCards** tab, type `team` in the Search bar.

- b. Locate **teamStarterWeatherForecast (version 1)** and open it. The data source and data table have not been completed, but the icon has already been formatted by the team.
 - c. Click **Clone** to clone and rename the FlexCard.
 - d. Rename it to **teamWeatherForecast**. Click **Clone**.
2. Select and configure the data source.

- a. Go to the **Setup** panel and scroll to **DATA SOURCE**.
- b. In the **Data Source Type** field, select **Integration Procedures**.
- c. In the **Name** field, select **team_getWeatherDetails**.
- d. Click **+ Add New** under **Input Map** (do this twice) and enter the following variables:

Key	Value
Days	5
AccountId	{recordId}

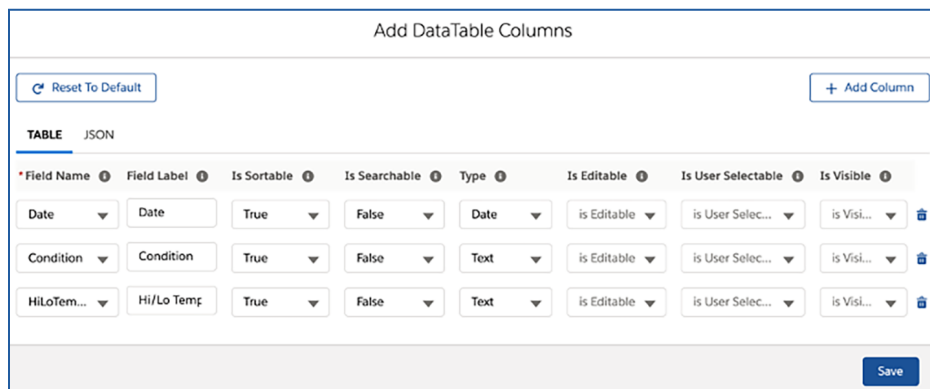
- e. Click the **Save & Fetch** button. Verify the stub data displays in the **JSON** tab. You see two nodes: **“Forecast”** and **“Current”**.
 - f. Click **Ok**.
 - g. To trim the data that’s returned to only the forecast, click in the **Result JSON Path** and select **[“Forecast”]**.
 - h. Click **Save & Fetch** again and confirm only Forecast data appears. Click **Ok** to return to the FlexCard.
3. Add a **Datatable** element to display the 5-day forecast data.
- a. Select the **5-Day Forecast** block.
 - b. In the **Build** panel drag a **Datatable** element inside the 5-Day Forecast block.
 - c. Select the **Edit** icon to configure the table.



4. Configure the **Date** and **Hi/Lo Temperature** fields in the datatable.
 - a. Change the **Type** of the date field to **Date**. This sets the format of the data to DD-MM-YYYY.
 - b. Note there are two lines for different HiLoTemp fields: Celsius and Fahrenheit. Discard the field for the unit you **don't** want to use by clicking the trashcan / bin icon to the right of the line.
 - c. Update the **Field Label** for the Hi/Lo Temp field to Hi/Lo Temp °F or Hi/Lo Temp °C. To display a degree symbol on a Mac, use **shift+option+8**. For a PC, use ASCII code 0176.



NOTE: If the degree symbol doesn't display now or in future, try clearing the label field and typing it in again, or try inserting a space between the symbol and C/F, for example, Temp ° F.

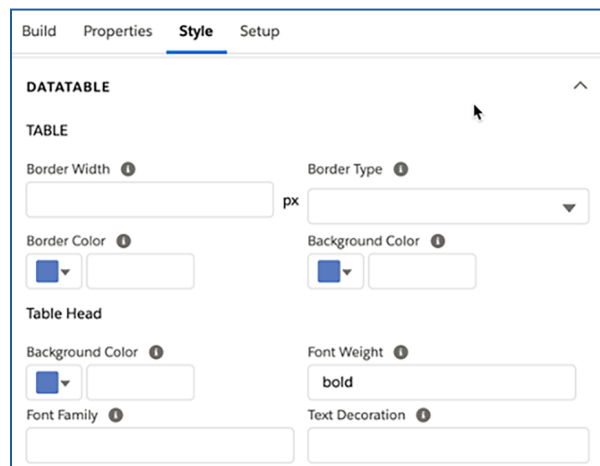


- d. Click **Save**.

The datatable looks like the below when you finish. Don't worry that you can't see the data populated. The Design view doesn't show data in a table, but Preview does.



5. Bold the labels in the table header.
 - a. Go to the **Style** panel and scroll to **DATATABLE**. Locate **Table Head**.
 - b. Enter `bold` in the **Font Weight** field.



- c. Scroll to **ALIGNMENT** and set **Text Align** to **Left**. (This will ensure the headers and text in the table are aligned in the same way.)
- d. **Preview** the FlexCard. You see the table five times for the 5 days you entered in the Input Map. A new FlexCard has **Repeat Records** enabled by default.

This means the data loops through records. When you want to display data that doesn't need to be looped through and displayed as a list, disable this feature. Datatables already loop over and list multiple records, so disable it.

- e. Return to the **Design** mode and go to the **Setup** panel.
- f. Expand **Repeat Options** and disable **Repeat Records**.
- g. **Preview** again. You see just the one datatable now.



Date	Condition	Hi/Lo Temp °F
1/26/2021	Heavy Snow	30.5/21.7
1/27/2021	Light Snow	31.7/22.8
1/28/2021	Flurries	31.0/18.7
1/29/2021	Clear sky	25.3/18.1
1/30/2021	Clear sky	24.2/19.7

- h. Click **Activate**.

There is no need to configure **Publish Options**, as this is a child FlexCard in the teamWeather flyout action.

Task 4: Configure the Flyout Action for the 5-Day Forecast

1. Configure the flyout action.
 - a. Return to the **teamWeather** FlexCard. Refresh the screen. This will ensure the new child card is an option for the Action element.
 - b. Select the **Action** element and change the **Element Name** to `Forecast` in the **Properties** panel.
 - c. Fill in the fields as follows:

Property	Value	Notes
Label	Get 5-Day Forecast	
Icon	<code>standard:forecasts</code>	
Display as Button Under Display As Button	✓ Outline Brand	
Action Type	Flyout	
Flyout Type	Child Card	
Flyout	teamWeatherForecast	If the card isn't visible, confirm you activated it and refresh the page.
Open Flyout in	Modal	

- d. Go to the **Style** panel. Locate the Color field for the Label. Enter `#3A6D9D` as the label color.
 - e. Scroll to the Icon Color field. Enter `#3A6D9D` as the icon color.
2. Preview the FlexCard to confirm the table appears correctly.
 - a. **Preview** the FlexCard.
 - b. Click the **Get 5-Day Forecast** button to view the forecast table. Verify all the fields are populating in the FlexCard.



Schenectady, New York

CONDITION
Heavy Snow

TEMPERATURE
27.5 °F

 [Get 5-Day Forecast](#)



Schenectady, New York

CONDITION
Heavy Snow

TEMPERATURE
27.5 °F

 [Get 5-Day Forecast](#) ✕

	Date	Condition	Hi/Lo Temp °F
	1/26/2021	Heavy Snow	30.5/21.7
	1/27/2021	Light Snow	31.7/22.8
	1/28/2021	Flurries	31.0/18.7
	1/29/2021	Clear sky	25.3/18.1
	1/30/2021	Clear sky	24.2/19.7