Display Data and Actions on a FlexCard

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

"As a service agent, I'd like to view information about a customer account."

After creating a new FlexCard, add elements to display data.

Prerequisites

- Meet the Data Source Wizard
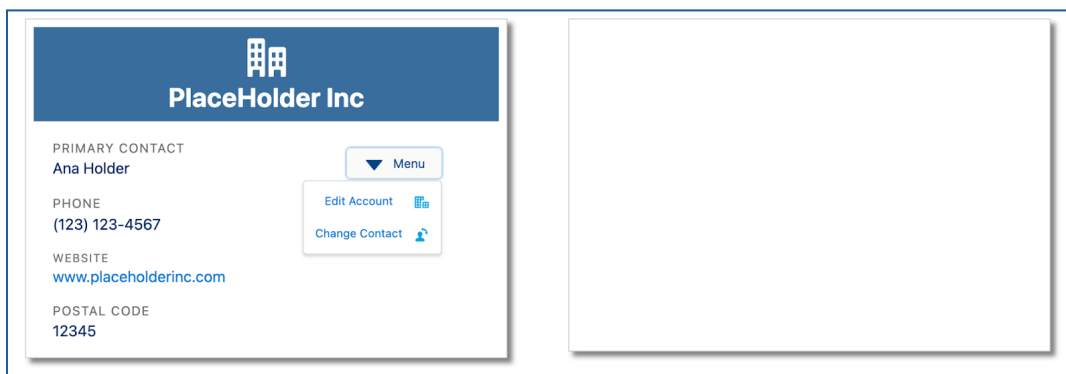
Tasks

1. Add and Style Block Elements
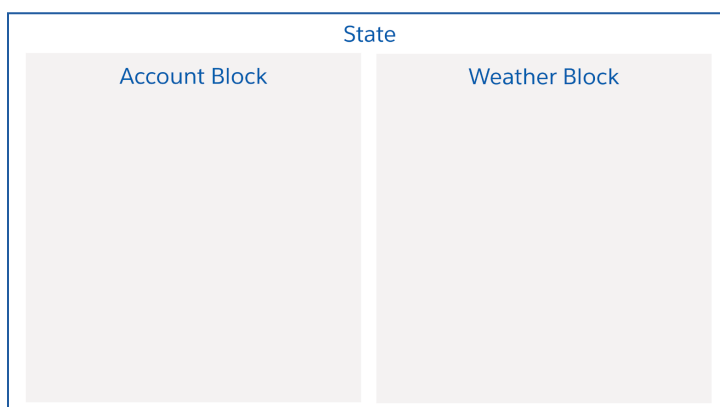2. Add Text, Icon, and Menu Elements
3. Populate Elements in the FlexCard

Time

- 35 mins

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What You Will Build

Task 1: Add and Style Block Elements

1. Go to the **OmniStudio FlexCards** tab.

2. In the **Search/Find in page** box, type the keyword `team`.

3. From the search results, expand **teamAccount**. You created this FlexCard in the previous exercise in **Meet the Data Source Wizard**.

4. Click **teamAccount (Version 1)**.

5. Add **Block** elements to the canvas and configure them.
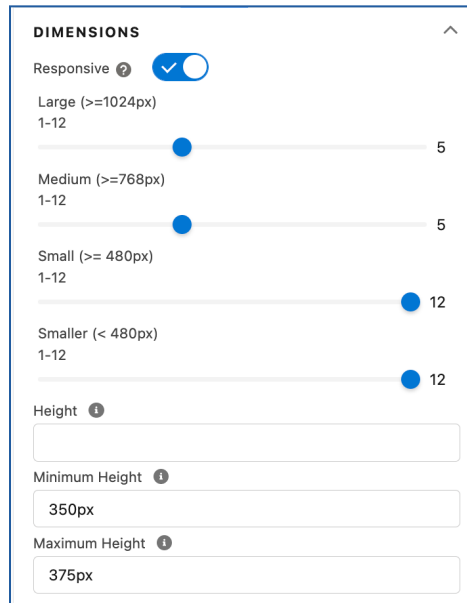   a. Go to the **Build** panel. Drag a **Block** element to the canvas.
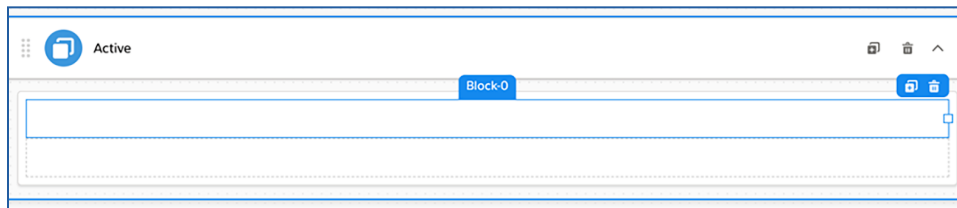
b. In the **Properties** panel, enter `Account` in the Element Name field.
c. Go to the **Style** panel.
d. Under **DIMENSIONS**, toggle **Responsive** to enable it.

With responsiveness enabled on an element, set the width to change as the viewport width changes. The responsive sizing of elements is mobile-first. Sizing starts at the smallest viewport breakpoint until the next wider viewport overrides it.
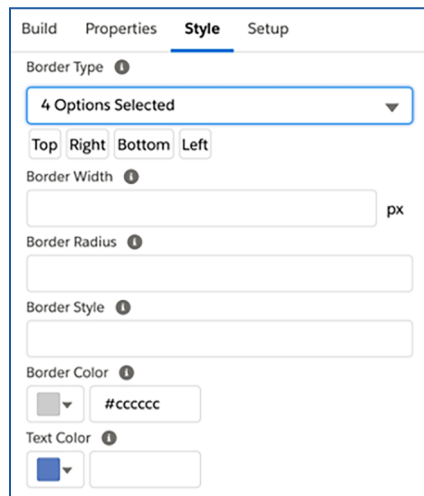
e. Adjust the element widths as follows:

Viewport Size	Size
Large	5
Medium	5

f. Enter `350` in the **Minimum Height** field. Entering a number without a unit defaults to the px unit.
g. Enter `375` in the **Maximum Height** field.

h. Scroll down to the **APPEARANCE** section.
i. In the **Border Type** dropdown, select **Top**, **Right**, **Bottom**, and **Left**. The dropdown shows 4 Options selected.
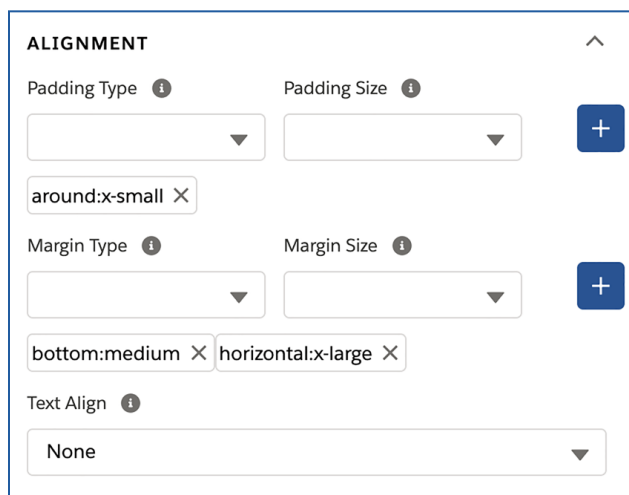

j. Scroll down to the **ALIGNMENT** section. Notice the Padding Type and Padding Style defaults to **around:x-small** and there are no defaults set for Margin Type and Margin Size.

k. Select a **Bottom** Margin Type and set the Margin Size to **Medium**. Click the **+** button.

l. Select a **Horizontal** Margin Type and set the Margin Size to **x-Large**. Click the **+** button.

NOTE: The Margin settings may not be immediately visible in the Properties pane, but you can see them applied on the Canvas.
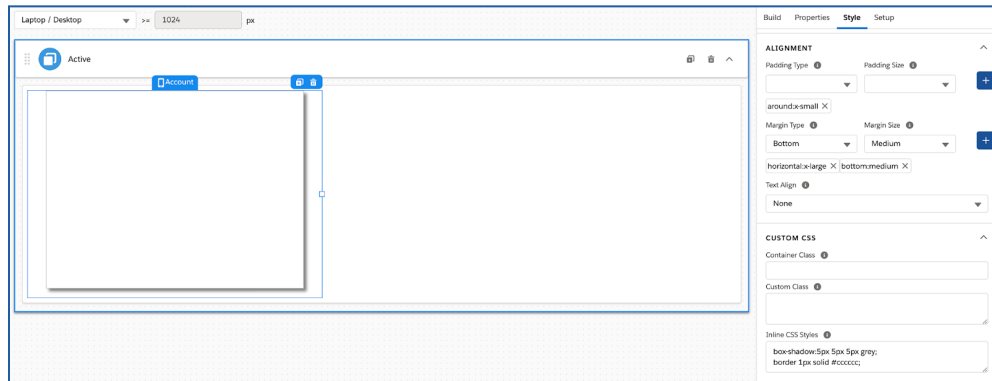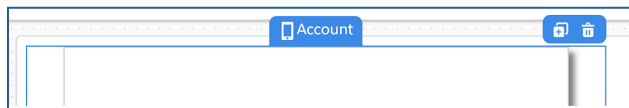

m. Scroll down to the **CUSTOM CSS** section. To add a box shadow to the **Block** element, copy and paste the below CSS to the **Inline CSS Styles** field:

```
box-shadow:5px 5px 5px grey;
border: 1px solid #cccccc;
```

Note the sample styling is automatically replaced.
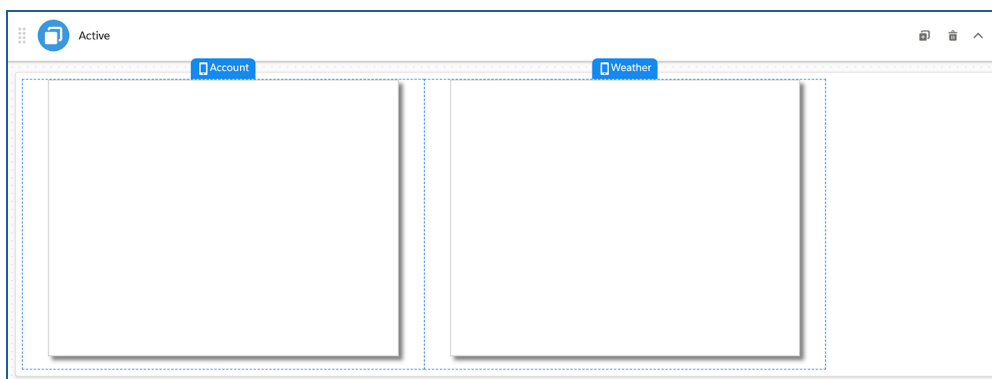
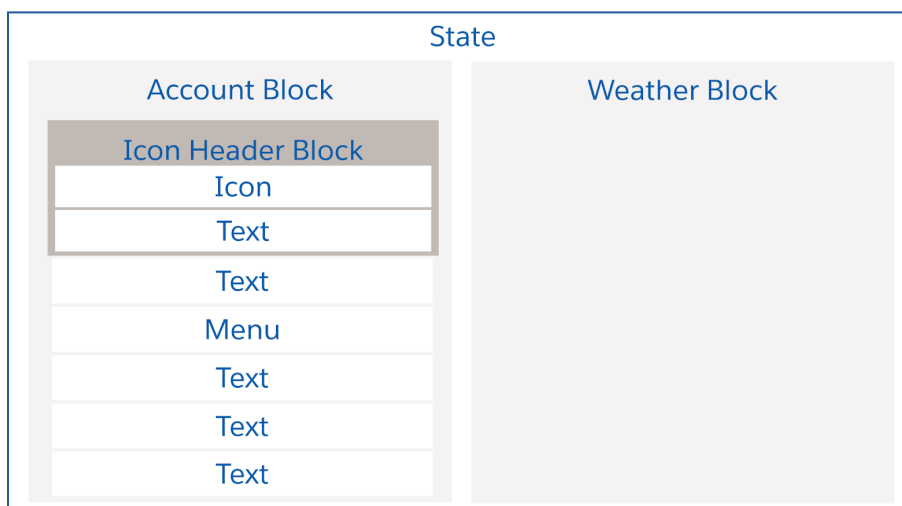n. Click the **Clone** icon next to the trashcan to clone the Account block.

o. In the **Properties** panel for the new block, rename the Element Name to `Weather`.

The FlexCard now looks like the image below.

p. Click the **Preview** button.

Task 2: Add Text, Icon, and Menu Elements

Adding data fields to a FlexCard canvas

There are three ways to add a data field to a state on the canvas that displays data returned from the data source. All are located in the **Build** panel:

- **Field** element – This is a "blank" field that is completely customizable.

- **Text** element – This combines text and parsed merge fields to display on a FlexCard.

- **Fields** list – Click **Fields** to view the list of available data fields. These fields are populated from the data source.

1. Build the header for the Account Details.

   a. Click **Design** to return to the Design view.

   b. From the **Build** panel, drag a **Block** element inside the Account block.

> **NOTE:** If you are having trouble placing the block inside the Account block, position your mouse along the top center of the block and release when you see the blue line inside it.

c. Change the Element Name to `Icon Header`

d. Drag an **Icon** element inside the Icon Header block.

e. Drag a **Text** element below the **Icon** element inside the Icon Header block.
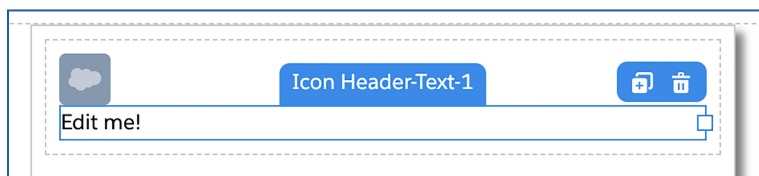
2. Add the data fields and a menu element for the Account Details.

a. Drag a **Text** element to below the Icon Header block. Make sure it is outside the Icon Header block, but still inside the Account block.

You will know if you dragged it into the right place by the name of the block. The element name will say **Icon Header-Text** if you dragged it into the Icon Header block but will say **Account-Text** if you dragged it into the Account block.
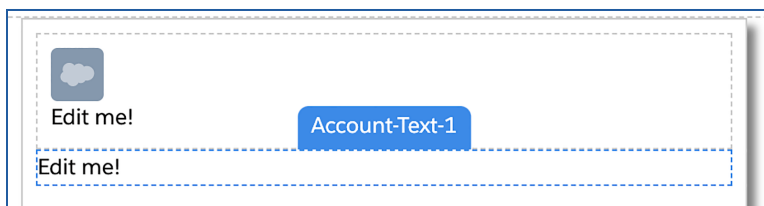

TIPS:
If you're having trouble placing an element on the canvas, such as inside or outside of a **Block** element, try selecting an element on the canvas so it's highlighted, then use that to guide you when placing a new element.

If you don't place it correctly the first time, move the elements around on the canvas after they've been placed. Note that the element name doesn't change after you move it to the canvas, it keeps the name you enter or the name automatically generated depending on its placement.

b. Clone the **Text** element three times.
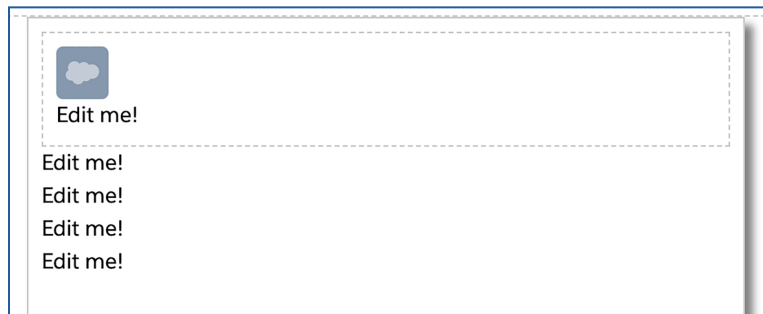
c. Drag a **Menu** element from the **Build** panel to between the top two **Text** elements.
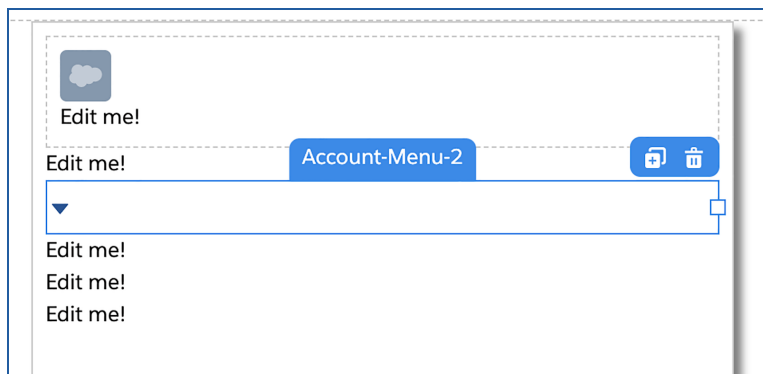
d. Click the **Preview** button. Click **Action Debugger**. This allows you to trace the flow of data from the data source into the FlexCard.

e. You will populate the elements with account data next, so make sure the data is being brought in from the Integration Procedure you configured. Locate the first entry for **Datasource** and expand it. This is the datasource for the Account block.

f. You will populate the elements with account data next, so make sure the data is being brought in from the Integration Procedure you configured. Note the **dataSource type** is **"IntegrationProcedures"**. Below it you see the name **team_getAccountContactDetails**.

g. Expand **response**. Verify the stub account data is being pulled.
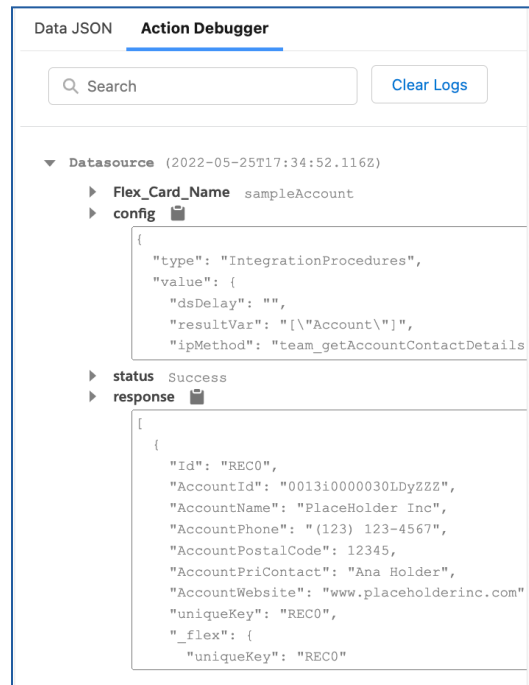
You're ready to populate the icon and text fields.

Task 3: Populate Elements in the FlexCard

1. Populate the Account Header.

    a. Click **Design** to return to the Design view.

    b. Select the **Icon** element in the Icon Header block.

    c. Configure the properties in the **Properties** panel as follows:

Field	Value
Element Name	Icon
Type	**Salesforce SVG**
Icon	utility:company
Size	**Large**
Variant	**Inverse**

    d. Delete the text in the **Extra Class** field. The icon didn't disappear, you only changed its color to white against a white background.
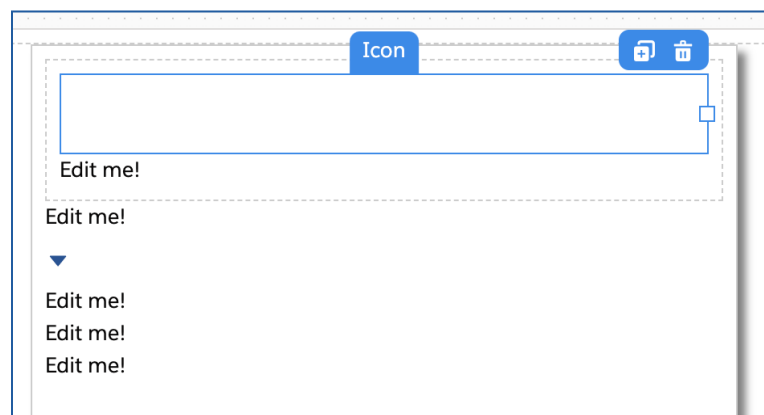
   e. Select the **Text** element in the Icon Header block. Locate **TEXT PROPERTIES** in the **Properties** panel.
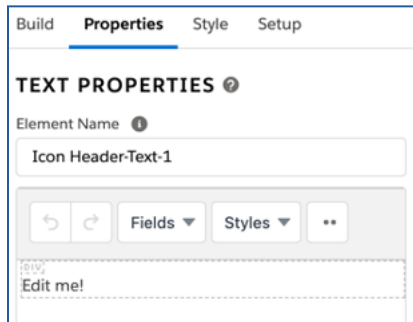
f. Click in the DIV line where it says **Edit me!** This is placeholder text. Delete it.

g. Leave your cursor in the DIV line so it's selected. This is the field for the account name, so it must be large and prominent. Put the merge field for the account name here.

h. Select **AccountName** from the **Fields** menu. This populates the DIV line with the merge field for the account name.

i. Select **Heading Large** from the **Styles** menu. Go to **Styles** > **Headers** > **Heading Large**.

> **TIP:**
> If you do not see the **Styles** menu, click the two dots (the **More** menu) to the right of **Div**.
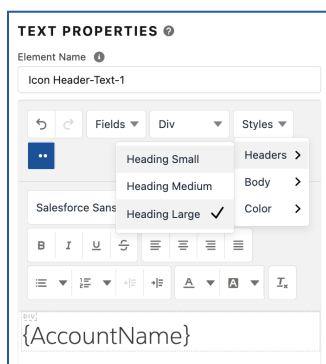

The fields in this menu are all pulled from the data source you configured with the wizard. When working with **Text** elements, find the fields pulled in by the data source in this menu.

j. If you have not already done so, click the **More** ![More icon] menu. Highlight the merge field and **bold** it.

k. Click the **Text color** menu ![Text color icon] and set the text color **White**. Make sure you select **Text Color** and not the **Background color** menu.
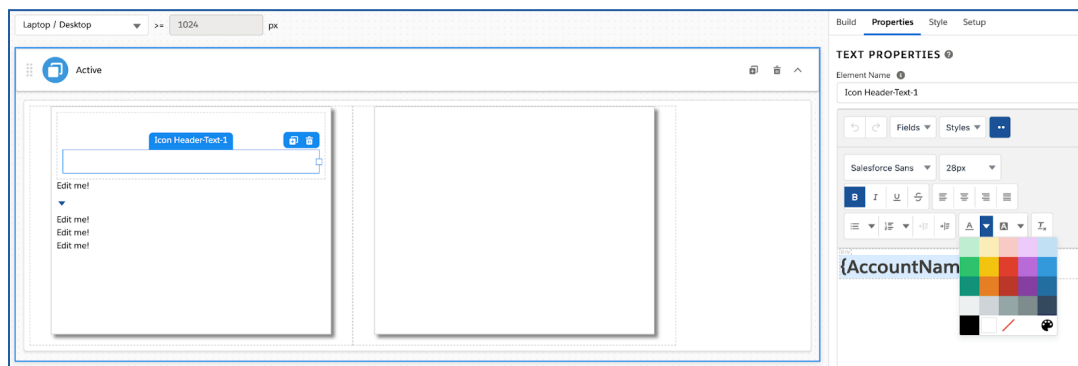

The Icon Header block now looks empty. Don't worry – you'll soon see the icon and header again.
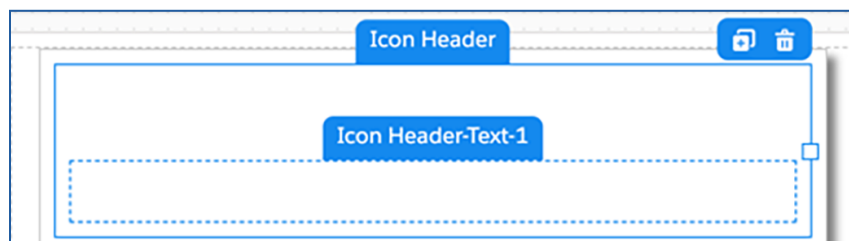

2. Configure the **Primary Contact** field.

a. Select the **Text** element under the Icon and Header block.

b. In the **Properties** panel, delete the placeholder text **Edit me!**

c. Make a second DIV line for the label to this field. Press **Return/Enter** on your keyboard.

d. In the top line, enter `Primary Contact` for the field label.

e. Go to the **Styles** menu and click to expand the menu.

f. Go to **Body** then select **Uppercase**.
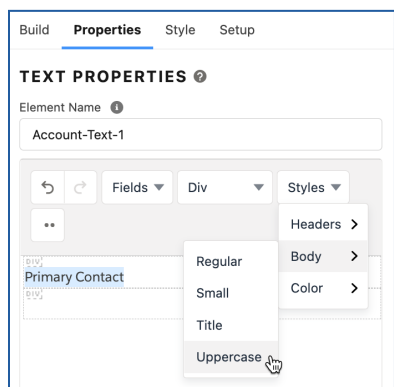
g. Click in the second DIV line.

h. Select **AccountPriContact** from the **Fields** menu. The merge field {AccountPriContact} populates in the line.

i. Select the merge field **{AccountPriContact}**, then click the **More** menu button.

j. Set the font size to **12pt**.

k. Now select the label PRIMARY CONTACT. Set the font size to **10pt**.
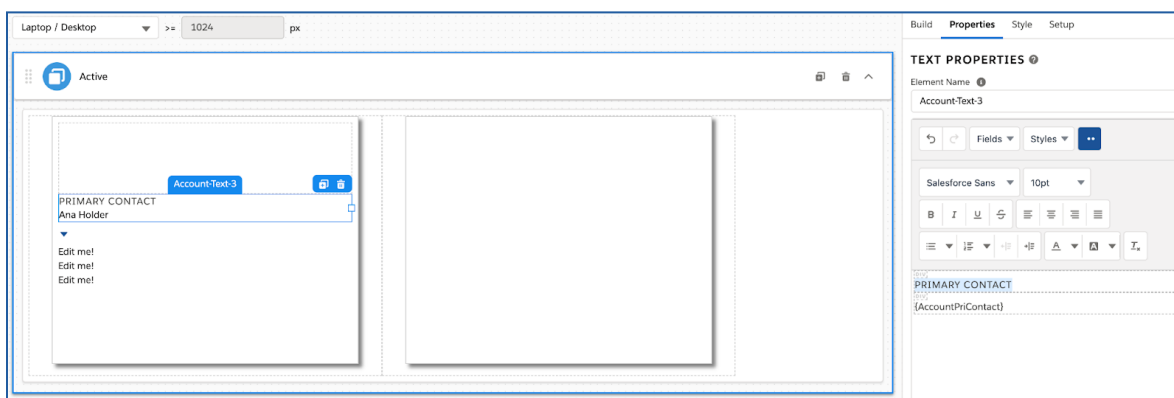
Repeat these steps for the remaining three Text fields.

3. Configure the **Phone** field.

    a. Select the **Text** element under the Menu element. It has **Text-3** in its name.
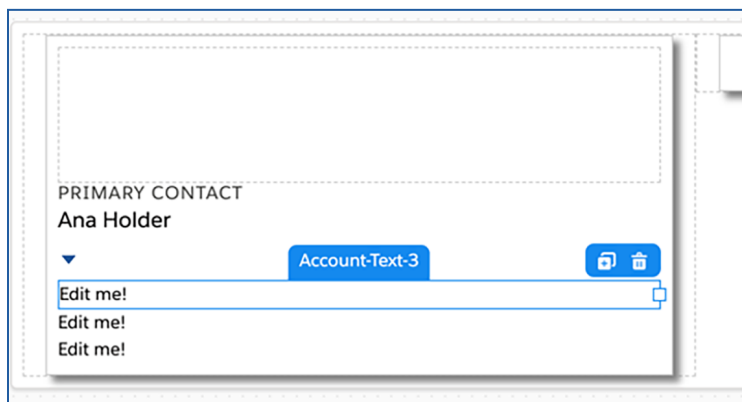
    b. Configure it as follows:

Field	Value
Edit Me!	Delete and enter a new line
Top Line (label)	Phone
Top Line (label)	**Styles > Body > Uppercase**
Top Line (label)	Font size **10pt**
Bottom Line (node)	**Fields > AccountPhone**
Bottom Line (node)	Font size **12pt**
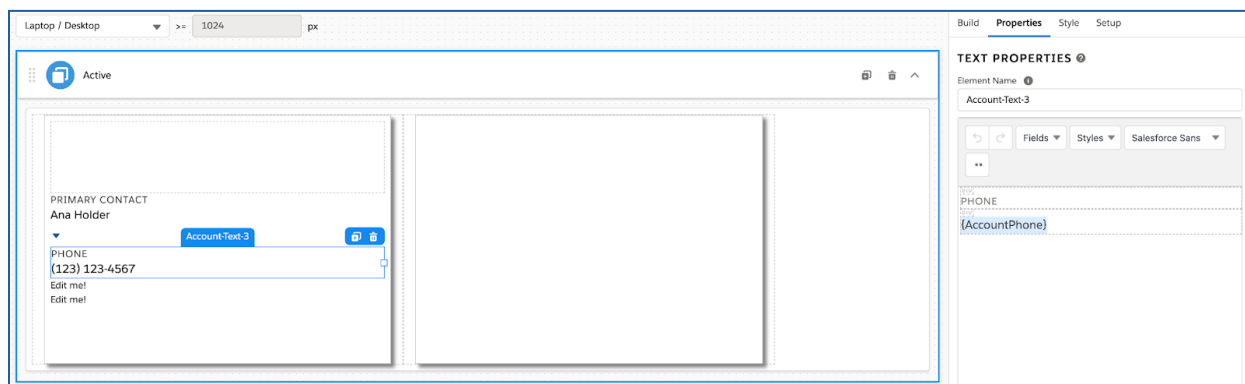
4. Configure the **Website** field.

   a. Select the **Text** element under **Phone**.

   b. Configure it as follows:

Field	Value
Edit Me!	Delete and enter a new line
Top Line (label)	Website
Top Line (label)	**Styles > Body > Uppercase**
Top Line (label)	Font size **10pt**
Bottom Line (node)	**Fields > AccountWebsite**
Bottom Line (node)	Font size **12pt**
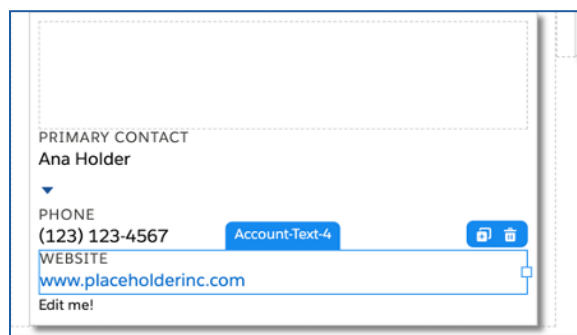
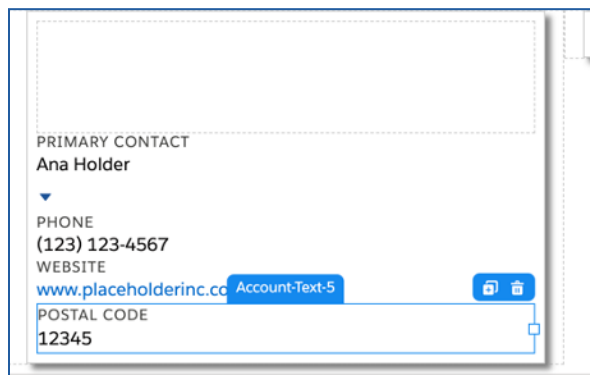5. Configure the **Postal Code** field.

   a. Select the **Text** element under **Website**.

   b. Configure it as follows:

Field	Value
Edit Me!	Delete and enter a new line
Top Line (label)	Postal Code
Top Line (label)	**Styles > Body > Uppercase**

|	
Top Line (label)	Font size **10pt**
Bottom Line (node)	**Fields > AccountPostalCode**
Bottom Line (node)	Font size **12pt**

6. Configure the Menu element to add multiple actions to the FlexCard.

    In this task, configure a menu of actions on the Account Details FlexCard using the Menu element you added earlier.

    a. Select the **Menu** element.

    b. In the **Properties** panel, configure the following fields:

Field	Value
Element Name	`Menu`
Label	`Menu`
Icon	`utility:down`
Enable Overflow	✔
Dropdown Position	**Right**
Dropdown Size	**xx-Small**
Variant	**Neutral**
Icon Position	**Left**

Icon Size	**Small**
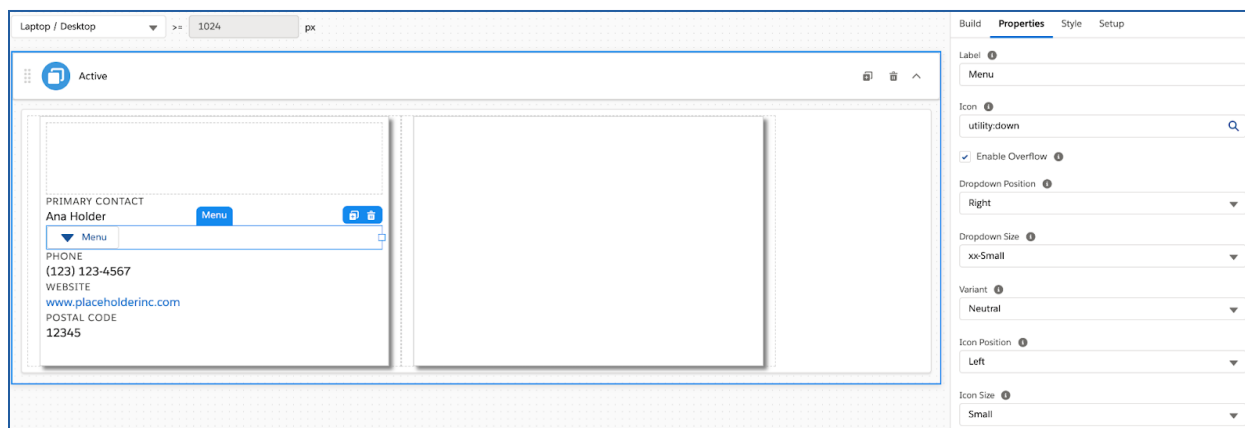
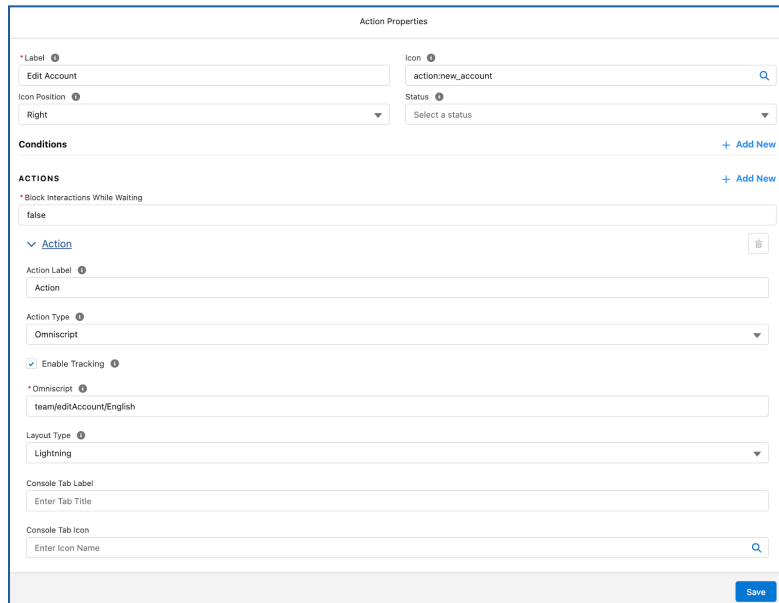7. Add an Omniscript Action to the menu to edit the account.

To add actions to the menu, use the **+ Add New Action** button at the bottom of the **Properties** panel.

a. Click **+ Add New Action**.

b. Configure the Action Properties as follows:

Field	Value
Label	`Edit Account`
Icon	`action:new_account`
Icon Position	**Right**
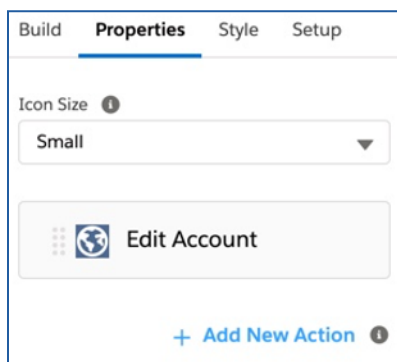
c. Expand **Action** and configure the additional properties as follows:

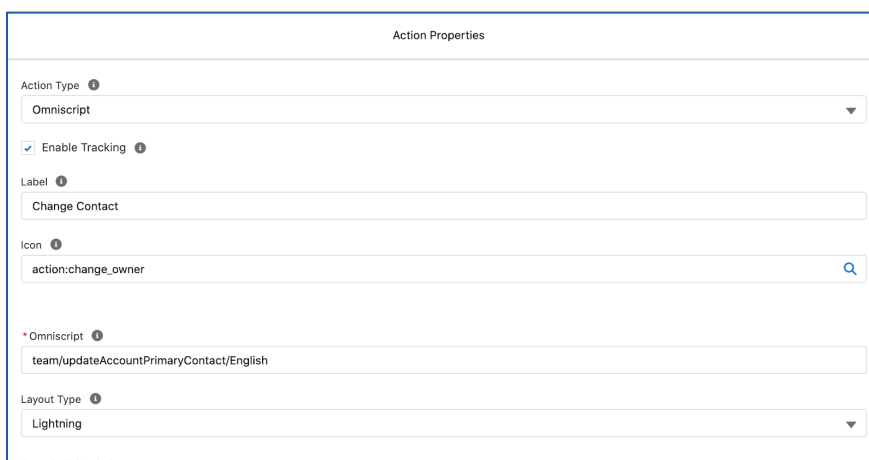| Field	Value
Action Type	**Omniscript**
Omniscript	**team/editAccount/English**
Context ID	**{AccountId}**
Open Target In	**New Tab/Window**

d. Click **Save**.

Once you save the action, find it in the **Properties** panel at the end of **MENU PROPERTIES** and above the **Conditions** section.

8. Add an OmniScript Action to the menu for updating the account's primary contact.
    a. Click **+ Add New Action.**
    b. Configure the Action Properties as follows:

Field	Value
Label	Change Contact

Icon	`action:change_owner`
Icon Position	**Right**
Action Type	**OmniScript**
Omniscript	**team/UpdateAccountPrimaryContact/ English**
ContextId	**{AccountId}**
Open Target In	**New Tab/Window**

Action Properties

Action Type ⓘ

Omniscript ▼

☑ Enable Tracking ⓘ

Label ⓘ
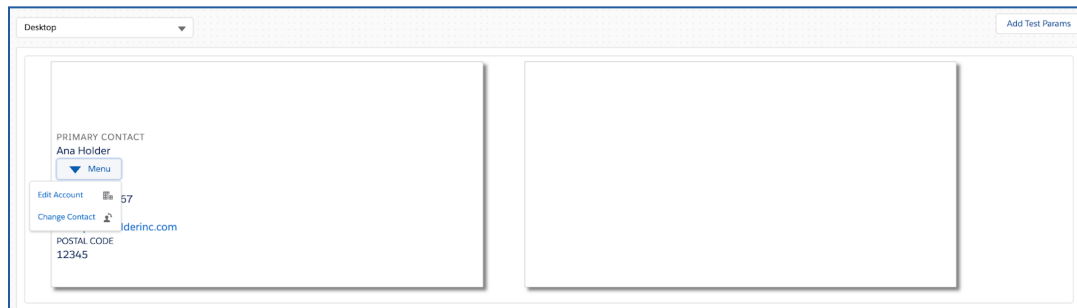
Change Contact

Icon ⓘ

action:change_owner 🔍

*Omniscript ⓘ

team/updateAccountPrimaryContact/English

Layout Type ⓘ

Lightning ▼

    c. Click **Save**.

Before you start styling the elements, preview the FlexCard.

9. Confirm the menu displays in Preview.
    a. Click the **Preview** button in the FlexCard header.
    b. Click the dropdown menu arrow. You see both actions you added to the menu.

Notice the fields are very close together. This is because the elements are not yet styled.