Validate Data and Handle Errors

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 my data entries to be validated and to receive warnings if I make mistakes."

Consider what kind of simple error checking helps them avoid making these mistakes. You'll start by simulating an error in your OmniScript, and work from there.

Prerequisites

- Build an OmniScript with Branching
- Create a Type Ahead Block Element

Tasks

1. Confirm Simple Error Checks
2. Add a Function to a Set Values Element for a Complex Error Check
3. Add Error Checking with a Set Errors Element

Time

- 35 mins

Task 1: Confirm Simple Error Checks

1. Simulate a simple error check in your OmniScript.
    a. In Preview. select **Create a new primary contact** to view the associated fields.
    b. Leave the fields empty and click **Next**.

    The OmniScript displays an error under each field due to the missing field data. At least one visible field must be set to **Required** for these error messages to display. What do you do when fields are no longer visible, but required?

Task 2: Add a Function to a Set Values Element for a Complex Error Check

1. Simulate a systematic error (the "Sad Path").
    a. In the header, click **Design**.
    b. In the Canvas, click **IPGetAccountPriContactDetails**.
    c. Update the **Active** toggle to closed. This deactivates the element, which is the data source.
    d. Click **Preview > Update primary contact**.
    e. Notice the contact information fields are now empty for the **Update primary contact** option.
    f. Click **Next**. Notice the text under the Primary Contact Email field.
2. Add a condition that hides the Email field if the UpdateName fields are blank.
    a. In the Header, click **Design** to return to the designer view.
    b. In the Canvas, click the **Primary Contact Email** (UpdateEmail) element.

c. Under **CONDITIONAL VIEW**, click the drop-down to review the **Condition Types**:

   i. Show Element if True

   ii. Disable Read Only if True

   iii. Set Element to Required if True

d. In **View Condition**, click **Show Element if True**.

e. Use **+ Add Condition** to add two conditions and complete the fields as follows:

Enter the field name	Logical Condition	Enter the value
UpdateFirstName	Does Not Equal	[leave blank]
UpdateLastName	Does Not Equal	[leave blank]

f. Click **Save**.

g. Return to **Preview > Update primary contact**.

h. Notice the email field is no longer displayed. However, if the user clicks **Next**, they go to the end of the OmniScript without having completed any actions.

3. Add an element that adds the logic needed to stop people from moving forward without taking any actions.

   a. Return to the Design view.

   b. In the **Build** panel, expand the **ACTIONS** section or use **Search** to locate **Set Values**.

   c. Drag a **Set Values** action into the Canvas, under the **StepContacts** element. This may be easier if you collapse the **StepContacts** element first.

   d. For **Name**, use `SVErrorCheck`. This is the variable name that shows up in the JSON node.

e. Under **Element Value Map**, click **+ Add New Element Value**.

f. For **Element Name**, use `SVErrorCheck`. You may see values in the dropdown, but you must type the name of the element here.

g. Select **Use Expression for Value** (under the **Element Name** field).

h. Paste the following text into the **Expression** text box to form the logical statement:

```
IF(%UpdateLastName%=null&&%TAChangeContact%=null&&%CreateLas
tName%=null, "NotOK", "OK")
```

i. If this statement is true, the expression returns the string “NotOK”.

ii. If this statement is false, the expression returns the string “OK”.

iii. If any of the three names in the expression contain a value, this expression returns OK.

iv. If all three names are missing a value, the expression returns NotOK.

ALERT:
If you paste the expression into the Value field rather than pasting it into the Expression text box (after you select **Use Expression For Value**), it does not work because "=" doesn’t prepend the formula. There must be an "=" before the formula for it to be correctly evaluated.

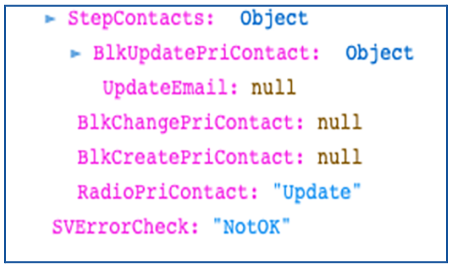
Rather than copy the text from this document, copy the expression from your OmniScript in the **Navigate Action** Internal Notes field near the bottom of the properties panel.

i. Click **Save**.

4. Test the element.

a. Click **Preview > Update primary contact >Next**.

b. In the **Data JSON** you see the value for “SVErrorCheck” is “NotOK”.



```
► StepContacts:   Object
  ► BlkUpdatePriContact:   Object
     UpdateEmail: null
    BlkChangePriContact: null
    BlkCreatePriContact: null
    RadioPriContact: "Update"
  SVErrorCheck: "NotOK"
```

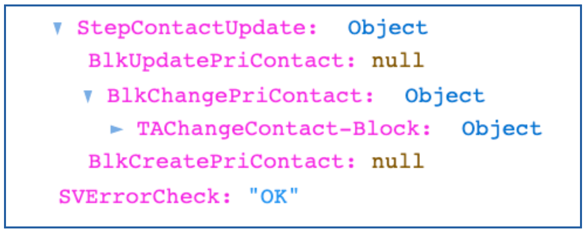
c. Click **Refresh**.

d. Select **Change primary contact**, and type “h”.

e. Choose **Place Holder**, then click **Next**.

f. Notice in the JSON code “SVErrorCheck” is “OK”.

This means that the logic is working correctly.



```
▼ StepContactUpdate:   Object
    BlkUpdatePriContact: null
  ▼ BlkChangePriContact:   Object
    ► TAChangeContact-Block:   Object
    BlkCreatePriContact: null
  SVErrorCheck: "OK"
```

Task 3: Add Error Checking with a Set Errors Element

1. Add a Set Errors element to send users back to a previous step if data is incomplete.

   a. In the header, click **Design**.

   b. In the **Build** panel, expand the **ACTIONS** section or use **Search** to locate **Set Errors**.

   c. Drag the **Set Errors** element into the canvas, under the SVErrorCheck element.

   d. Change Name to `SetErrors`.

   e. Under **Element Error Map**, click + **Add New Element Value**.

   f. For **Element Name**, select **RadioPriContact**.

   g. For Value, add `Please change or create a new primary contact!`

      You need to specify the action to take when the radio button element is displayed. In this case, you want the user to either change or create a new primary contact.

   h. Click **Save**.

2. Add a conditional view to the **Set Errors** element.

   Set Errors elements must have a conditional view. The condition for this error check is that SVErrorCheck is equal to NotOK. Add the condition as follows:

   a. Under **CONDITIONAL VIEW > View Condition**, click **Show Element if True**.

   b. For the field name, choose **SVErrorCheck** from the dropdown list.

   c. Ensure that **Equal To** is selected.

   d. For the **Value**, use `NotOK`. (OK is case sensitive.)

   e. Click **Save**.

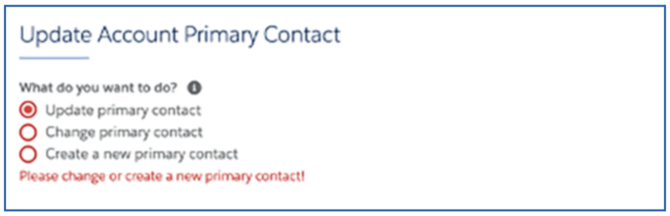
      Note the condition icon (the orange eye) now displays.

3. Test the Set Errors element.

    a. In the header, click **Preview > Update primary contact**.

    b. Confirm no primary contact is shown and click **Next**.

    c. Notice the instructions in red.



Update Account Primary Contact

What do you want to do?

[✓ Update primary contact]
Change primary contact
Create a new primary contact

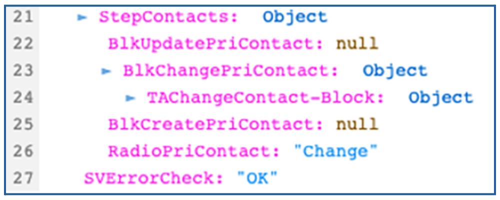
Please change or create a new primary contact!

    d. Select **Change primary contact**.

    e. Type `h` and choose **Place Holder**.

    f. Click **Next**.

    g. In the **Data JSON** notice that the value for "SVErrorCheck" is "OK".



```
  ► StepContacts:  Object
     BlkUpdatePriContact: null
    ► BlkChangePriContact:  Object
      ► TAChangeContact-Block:  Object
     BlkCreatePriContact: null
     RadioPriContact: "Change"
   SVErrorCheck: "OK"
```

4. Activate the Integration Procedure element again.

    a. Return to the Design view.

    b. In the Navigation Panel, use the Tree or Slide View, select the **IPGetAccountPriContactDetails** element to show the properties.

    c. Change the **Active** toggle to blue or "on".

    d. Click **Preview > Update primary contact**. You see the Primary Contact data displayed again.