


Before You Begin

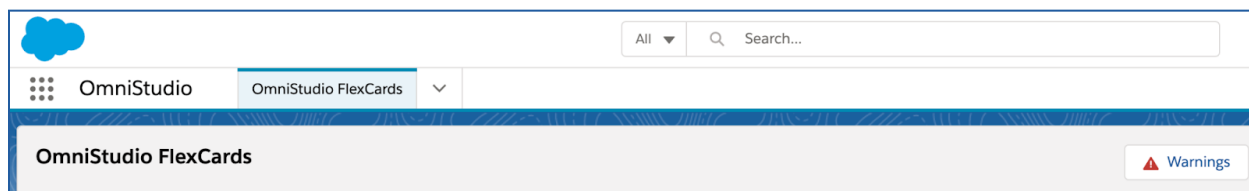
Did you sign up for a special OmniStudio Developer Edition org already? You'll need one to do the steps in this guide. Here's how to request one if this is your first time completing an OmniStudio module:

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.

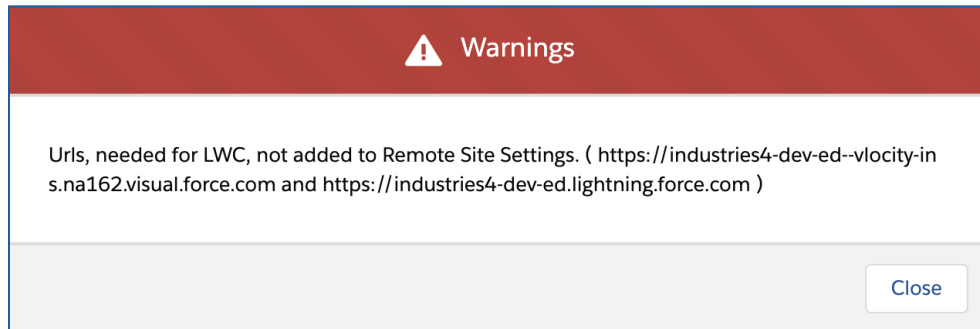
You are logged in to your Developer Edition and you can begin practicing.

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.

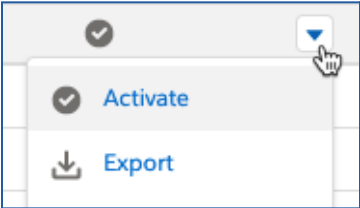
Update Session Settings

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**.



Work with Child FlexCards

Requirements

“As a service agent, I'd like to view information about a customer account, including a list of contacts and cases associated with the account.”

Customize two prebuilt child FlexCards to display contact and case data for an account. Then embed them inside two prebuilt parent FlexCards that have collapsible blocks.

Prerequisites

- None

Tasks

1. Build the Contacts Child FlexCard and Embed it in its Parent
2. Build the Cases Child FlexCard and Embed it in its Parent

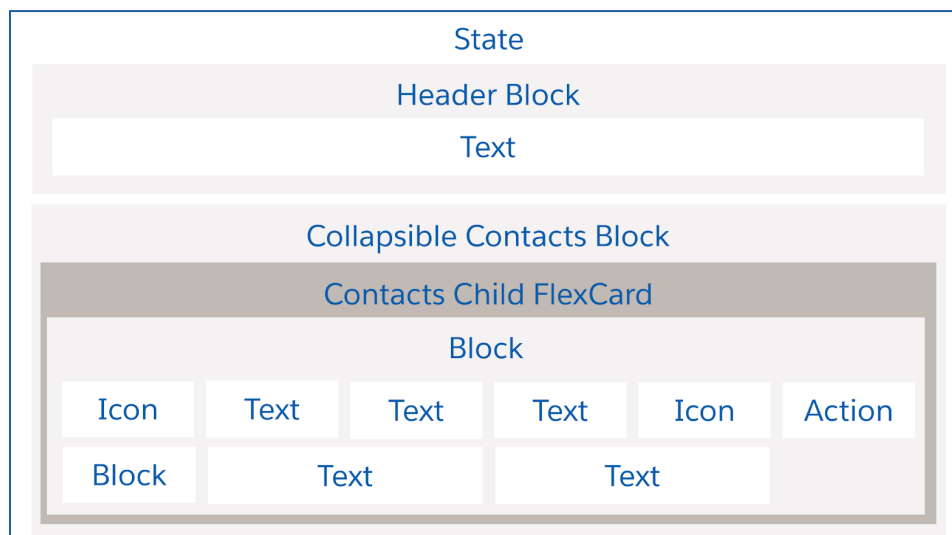
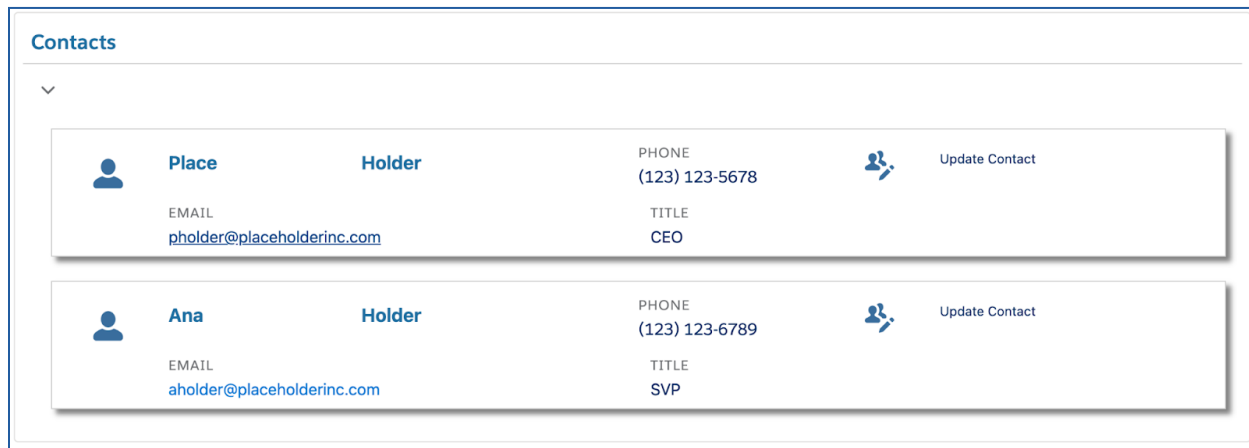
Time

- 20 mins
-

Task 1: Build the Contacts Child FlexCard and Embed it in its Parent

In this lesson, you use pre-built parent FlexCards for the Contacts and Cases data and embed child FlexCards to them with the **FlexCard** element.

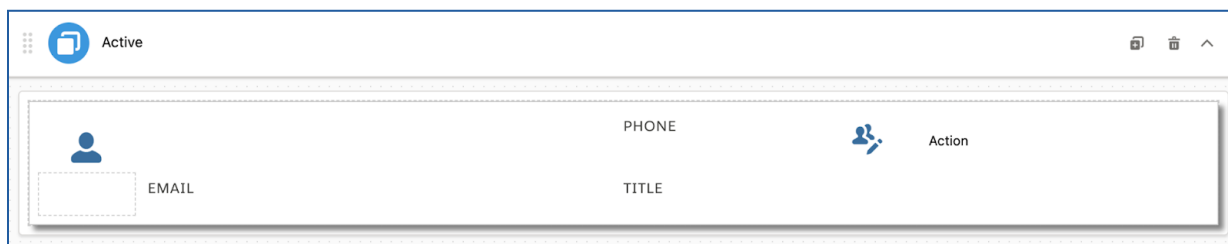
What You Will Build



1. Create the Contacts child FlexCard.
 - a. Go to the **OmniStudio FlexCards** tab.
 - b. In the **Search/Find in page** box, type the keyword `team`.

- c. From the search results, expand **teamStarterContacts**.
- d. Click **teamStarterContacts (Version 1)**.
- e. Click the **Clone** button in the Header.
- f. Rename the Card `teamContacts` and click **Clone**.

Notice the FlexCard is already built out and styled with field and action elements inside a block. However, the FlexCard is not displaying any data because the data source is not configured yet. The action is also not configured.



2. Configure the data source.

- a. Go to the **Setup** panel. Scroll down to the **DATA SOURCE** section. Configure as follows:

Field	Value
Data Source Type	Integration Procedures
Name	team_getAccountContactDetails
Input Map Key and Value	Add the same input map variable and value as you did for the account FlexCard: <code>AccountId</code> and <code>{recordId}</code> .

- b. Click **Save & Fetch** and verify you see the two placeholder contacts in the **JSON** tab. This indicates the stub data is being retrieved successfully.

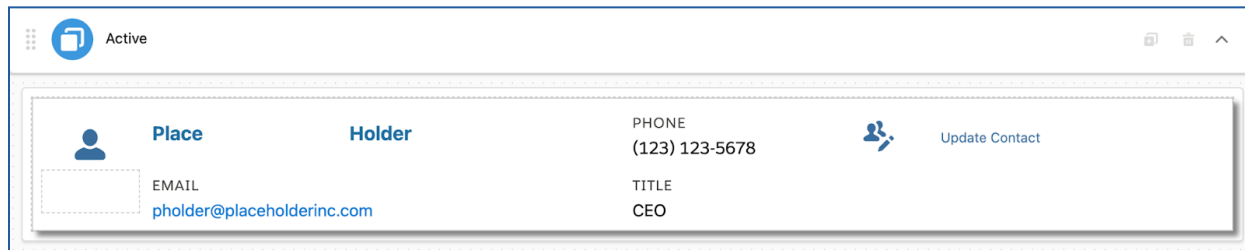
```
Records Size- 0.58KB
Performance Metrics-Browser- 138 ms
TABLE  JSON
{
  "Contact": [
    {
      "ContactEmail": "pholder@placeholderinc.com",
      "ContactId": "0033i0000029WovZZZ",
      "ContactFirstName": "Place",
      "ContactPhone": "(123) 123-5678",
      "ContactLastName": "Holder",
      "ContactTitle": "CEO"
    },
    {
      "ContactEmail": "aholder@placeholderinc.com",
      "ContactId": "0033i0000029Wp0ZZZ",
      "ContactFirstName": "Ana",
      "ContactPhone": "(123) 123-6789",
      "ContactLastName": "Holder",
      "ContactTitle": "SVP"
    }
  ],
  "Account": {
    "AccountId": "0013i0000030LDyZZZ",
    "AccountName": "PlaceHolder Inc",
    "AccountPhone": "(123) 123-4567",
    "AccountPostalCode": 12345,
    "AccountPriContact": "Ana Holder",
    "AccountWebsite": "www.placeholderinc.com"
  }
}
```

c. Click **Ok** to exit from the window.



NOTE: Even though there are two contacts in the stub data, you see one of them in Design mode. Don't be alarmed if you don't see both on the canvas. Once you preview, all data displays.

- d. In the **Setup** panel, locate the **Result JSON Path** field and select [**“Contact”**].
- e. Verify the contact information is displayed. If it is not, you may need to click **Save & Fetch** again.



3. Configure the action to launch an OmniScript updating the contact in a modal window.

A flyout is a type of action that displays additional data in a modal window or popover. For this OmniScript action you want to launch the OmniScript in a modal window instead of a new tab/window. To do this, use a flyout action and select OmniScripts as the component to display.

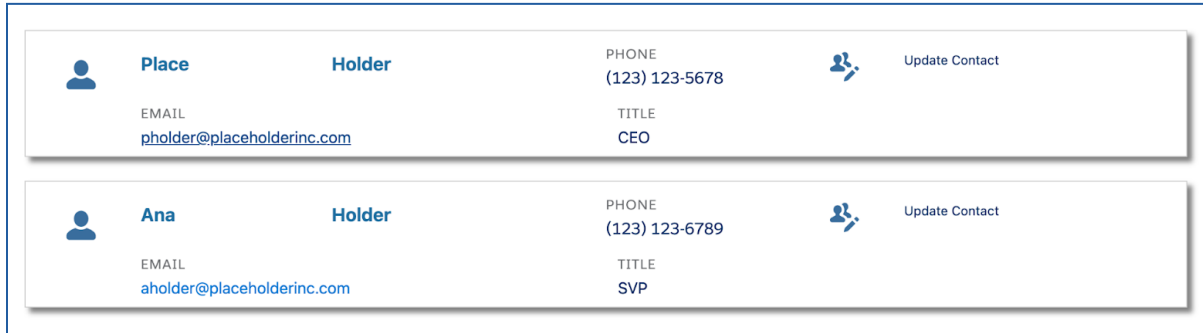
- a. Select the action element in the block and configure it as follows:





Field	Value
Action Type	Flyout
Label	Update Contact
Icon	Leave this blank or as-is
Flyout Type	OmniScripts
Flyout	team/editContact/English
Layout Type	Lightning
Attributes	Click + Add New
Key	ContextId
Value	{ContactId}
Open Flyout In	Modal



NOTE: The attribute added to the action maps the ContextId from the OmniScript to the FlexCard. If this isn't mapped, the data would not display.

4. Activate the FlexCard.
 - a. **Preview** the FlexCard.



	Place	Holder	PHONE (123) 123-5678		Update Contact
	EMAIL pholder@placeholderinc.com		TITLE CEO		
	Ana	Holder	PHONE (123) 123-6789		Update Contact
	EMAIL aholder@placeholderinc.com		TITLE SVP		

NOTE:

Since the OmniScript is not built yet, you may see an error when you preview that says: **Error! No MODULE named markup://c:teamEditContactEnglish found : [markup://c:cfTeamContacts_1_Salesforce]: Source.** If you do, dismiss the error. This will not impact your ability to preview the Card.

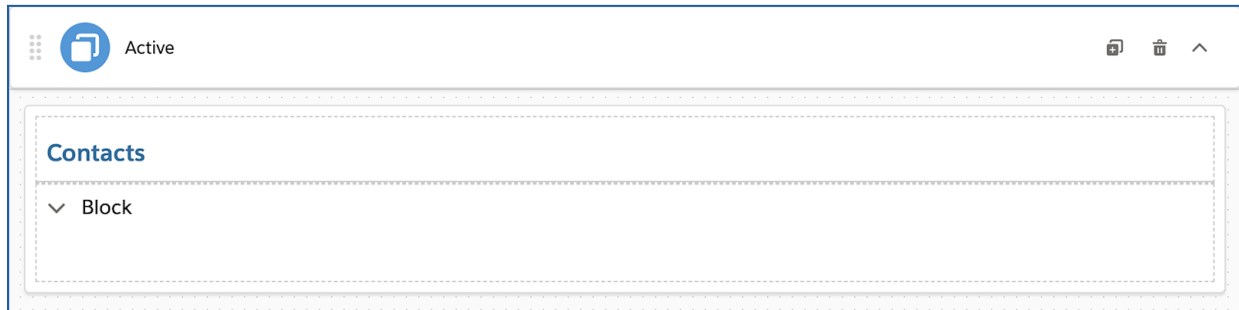


Error!
No MODULE named markup://c:teamEditContactEnglish found : [markup://c:cfTeamContacts_1_Salesforce]: Source

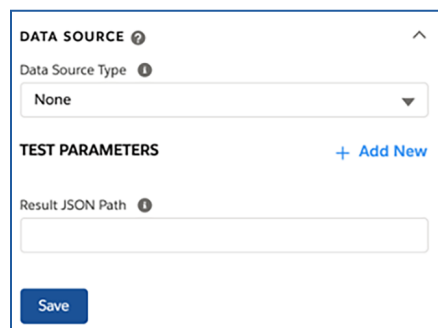
Flyout actions are visible in Preview. Since the OmniScript is not built yet, clicking **Update Contact** will not work. You can preview the action after the OmniScript is created and also when real data is linked.

- b. Click **Activate**.
 - c. Click **Done**.
5. Embed the Contacts child FlexCard in the **teamContactsParent** FlexCard.
 - a. Return to the **OmniStudio FlexCards** tab.
 - b. Refresh the page and confirm **teamContacts** displays as **Active**
 - c. In the Search/Find in page box, type the keyword `team`.

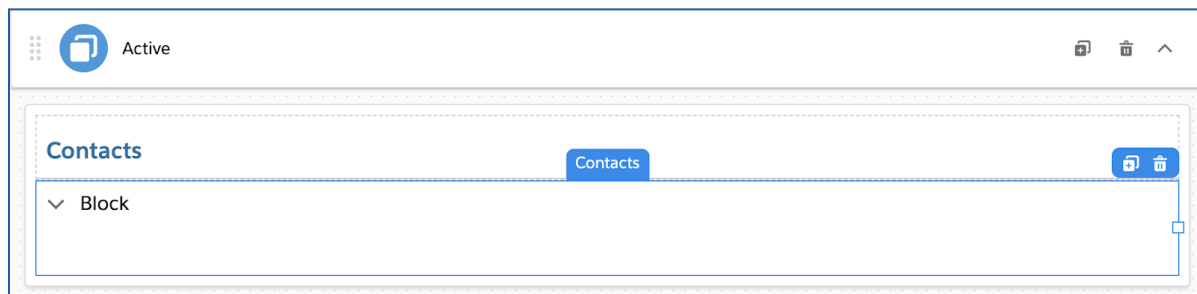
- d. From the search results, expand **teamContactsParent**.
- e. Click **teamContactsParent (Version 1)** to open it.



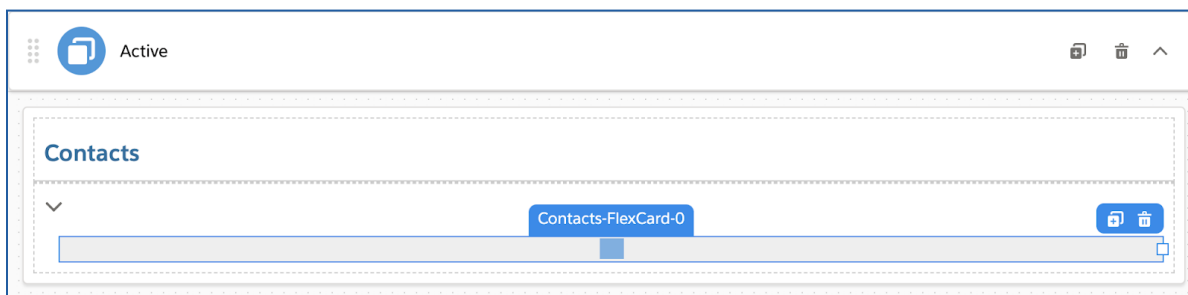
- f. Go to the **Setup** panel and scroll to **DATA SOURCE**. Note that the source is set to **None**. For the Contacts data, you set the data source on the child FlexCard and do not push from the parent data source, so leave this as-is.



- g. Select the block element named **Contacts** below the icon and Contacts header.



- h. Note in the **Properties** panel that **Collapsible** is selected. This allows the block to be collapsed and hide the fields inside it.
- i. Replace the placeholder text **Block** from the **Label** field with text of your choosing.
- j. Make the block **Collapsed By Default**.
- k. Expand the block again by clicking the down arrow in the top left corner of the block. It must be expanded to add an element to it.
- l. Go to the **Build** panel.
- m. Drag a **FlexCard** element to the expanded **Contacts** block.



- n. In the **Properties** panel, locate the **FlexCard Name** field.

Start typing `team` and select **teamContacts**. Refresh the page again if you don't see it in the list.



ALERT:

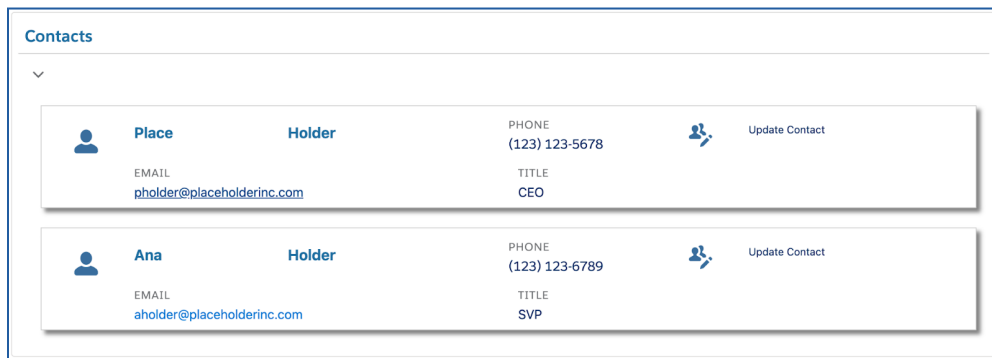
If you have to refresh the screen to view your child FlexCard, the FlexCard element you just added to the card will no longer be visible. Click in the expanded block until you highlight it again. If you drag a second FlexCard element into your card, the empty FlexCard element will cause an error on preview: **Error! No MODULE named markup://cf found : [markup://c:cfTeamContactsParent_1_VU]: Source**



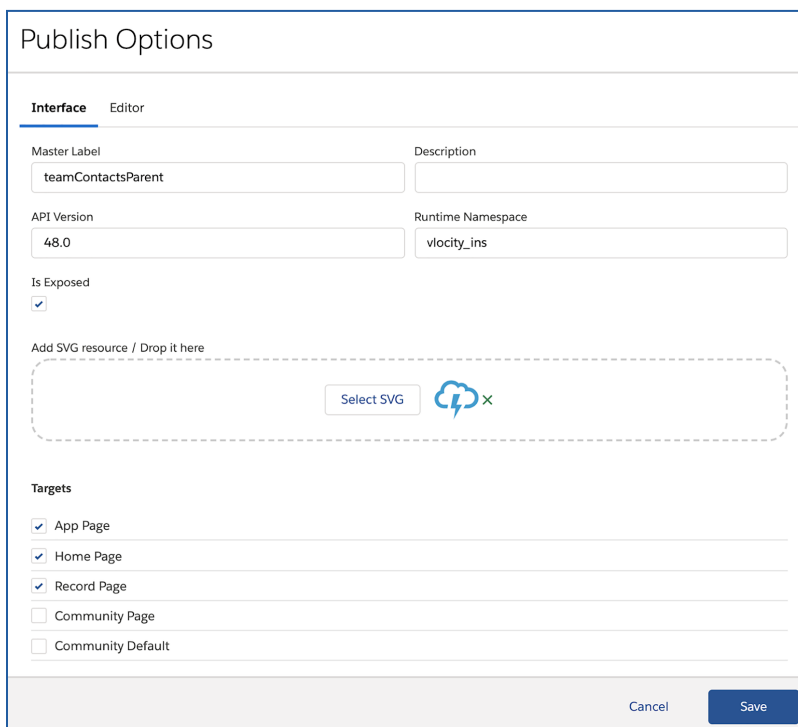
Error!
No MODULE named markup://c:cf found : [markup://c:cfTeamContactsParent_1_VU]: Source



- o. **Preview** the FlexCard. Try out the collapsible feature to make sure the block expands and shows the data.

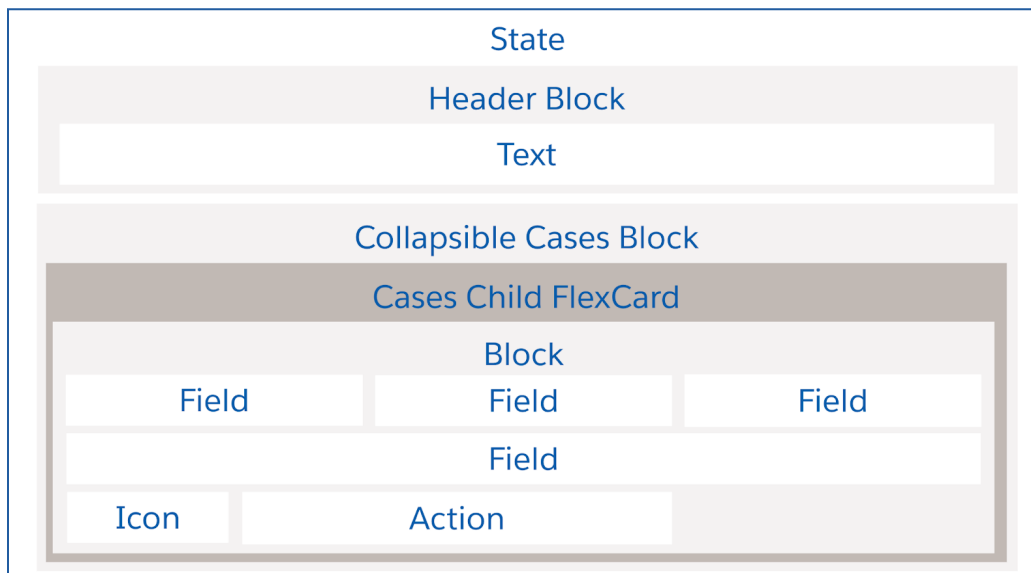
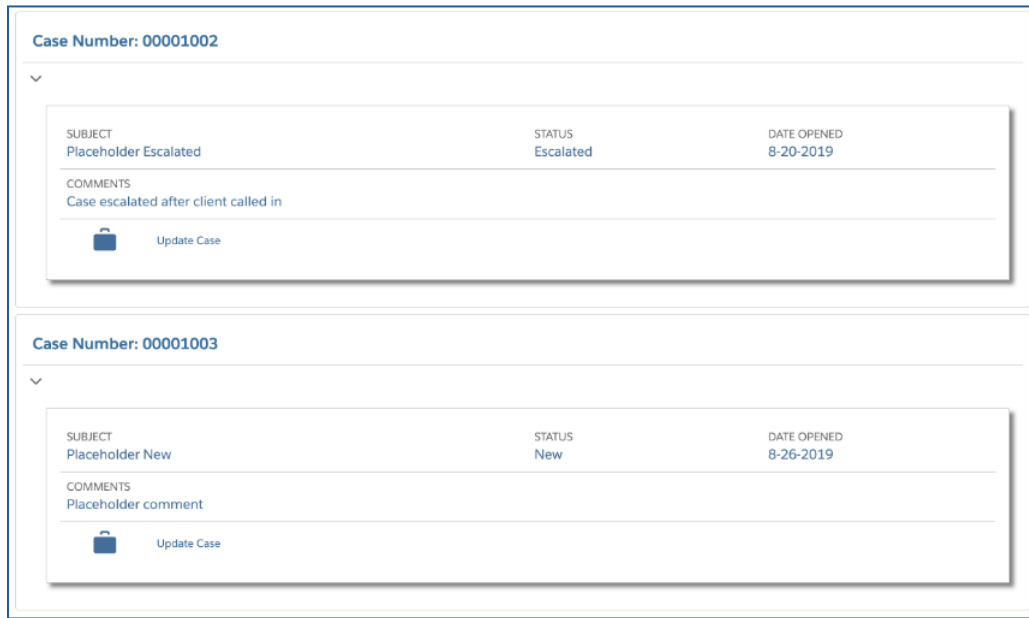


- p. Click **Activate**.
- q. Click **Publish Options** and verify that the targets **App Page**, **Home Page**, and **Record Page** are selected. This allows you to choose where the FlexCard is accessible. You can also change the visible name of the activated FlexCard.
- r. Close the dialog box by clicking **Cancel** or **Save**.



Task 2: Build the Cases Child FlexCard and Embed it in its Parent

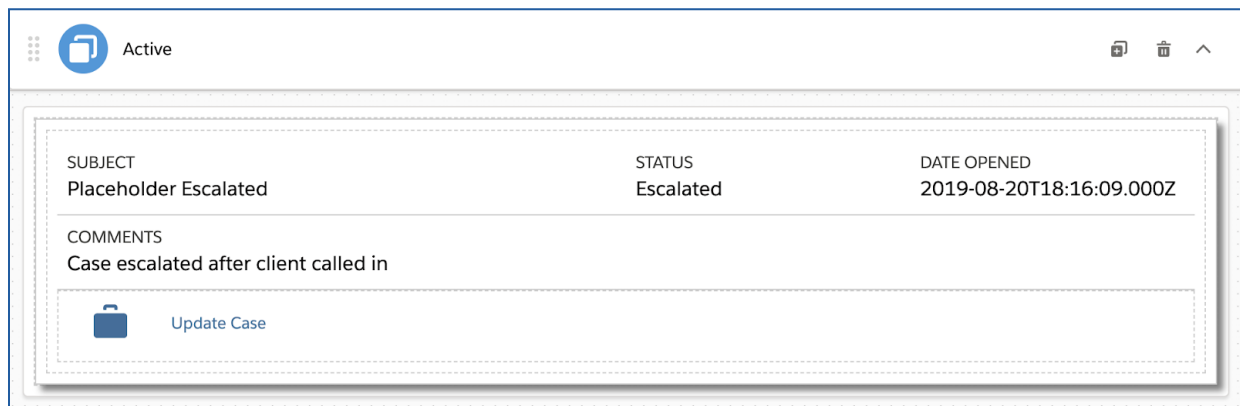
What You Will Build



1. Create the Cases child FlexCard.
 - a. Go to the **OmniStudio FlexCards** tab.
 - b. In the **Search/Find in page** box, type the keyword `team`.
 - c. From the search results, expand **teamStarterCases**.
 - d. Click **teamStarterCases (Version 1)**.
 - e. Click the **Clone** button in the Header.
 - f. Rename the Card `teamCases` and click **Clone**.

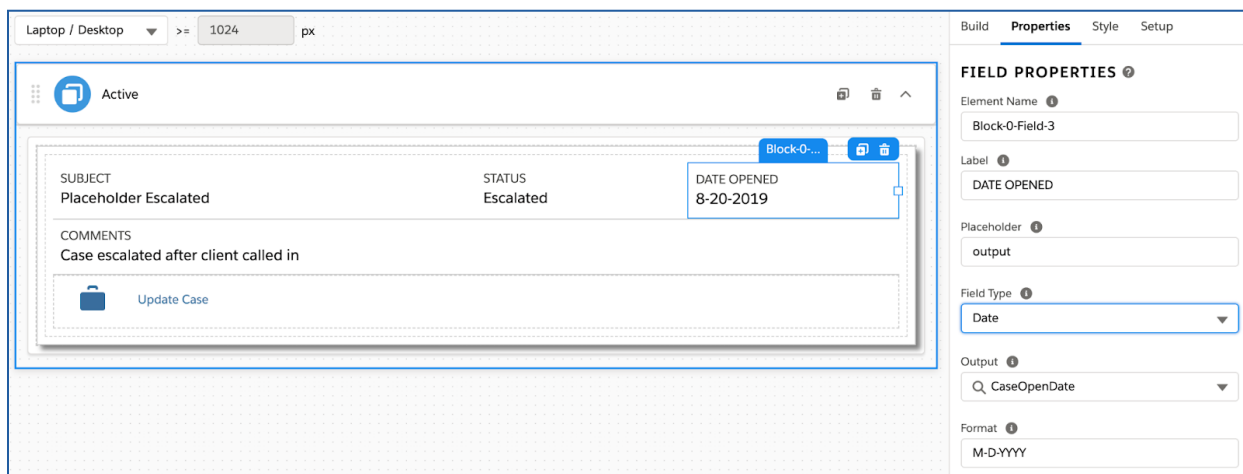
The FlexCard is already built out, with the data source and **Update Case** action configured and the elements styled.

Notice the **DATE OPENED** field. For fields that display a date, date time, number, or currency, you must also make sure the **Field Type** matches it. You'll set the correct Field Type for the date, then switch the data source for this FlexCard to use the parent's data source.



2. Select the correct field type for the **DATE OPENED** field.
 - a. Select the **DATE OPENED** field.
 - b. In the **Field Type** dropdown, select **Date**. Read the tooltip. Use the Field element to display other field types, including a text, a number, currency, and a date with time.

- c. Note the format. Click the tooltip to read more about it. Change the format to D-M-YYYY.
- d. Leave it in the Day-Month-Year format, or change it back to M-D-YYYY or use MMM to display the month as an abbreviation such as Nov.



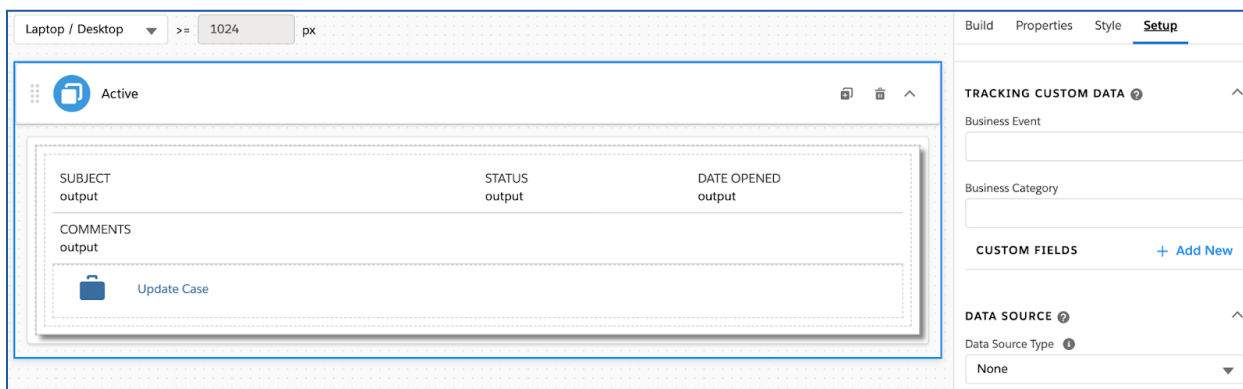
The screenshot shows the FlexCard editor interface. On the left, a preview of a FlexCard is displayed with the following content:

- SUBJECT:** Placeholder Escalated
- STATUS:** Escalated
- DATE OPENED:** 8-20-2019
- COMMENTS:** Case escalated after client called in
- Update Case** button

On the right, the **Properties** panel is open, showing the **FIELD PROPERTIES** for the selected field:

- Element Name:** Block-0-Field-3
- Label:** DATE OPENED
- Placeholder:** output
- Field Type:** Date
- Output:** CaseOpenDate
- Format:** M-D-YYYY

3. Set the data source to take from its parent and preview and activate the FlexCard.
 - a. Go to the **Setup** panel and scroll to the **DATA SOURCE** section.
 - b. Select **None** in the **Data Source Type** dropdown menu. This changes all the fields to show **output**, which is the placeholder text. Configure the parent FlexCard with the Integration Procedure used to preview the child FlexCard.



The screenshot shows the FlexCard editor interface with the **Setup** panel open. The preview on the left now shows placeholder text:

- SUBJECT:** output
- STATUS:** output
- DATE OPENED:** output
- COMMENTS:** output
- Update Case** button

The **Setup** panel on the right shows the **DATA SOURCE** section:

- TRACKING CUSTOM DATA:** Business Event, Business Category
- CUSTOM FIELDS:** + Add New
- DATA SOURCE:** Data Source Type is set to **None**



NOTE:

In this lab, you set the data source to **None** for the Cases child FlexCard because we want you to see that the child uses the parent data source in the next task. However, you don't need to touch the data source at all, since if the FlexCard element in the parent is configured to push data to the child, the parent data source overrides the child data source.

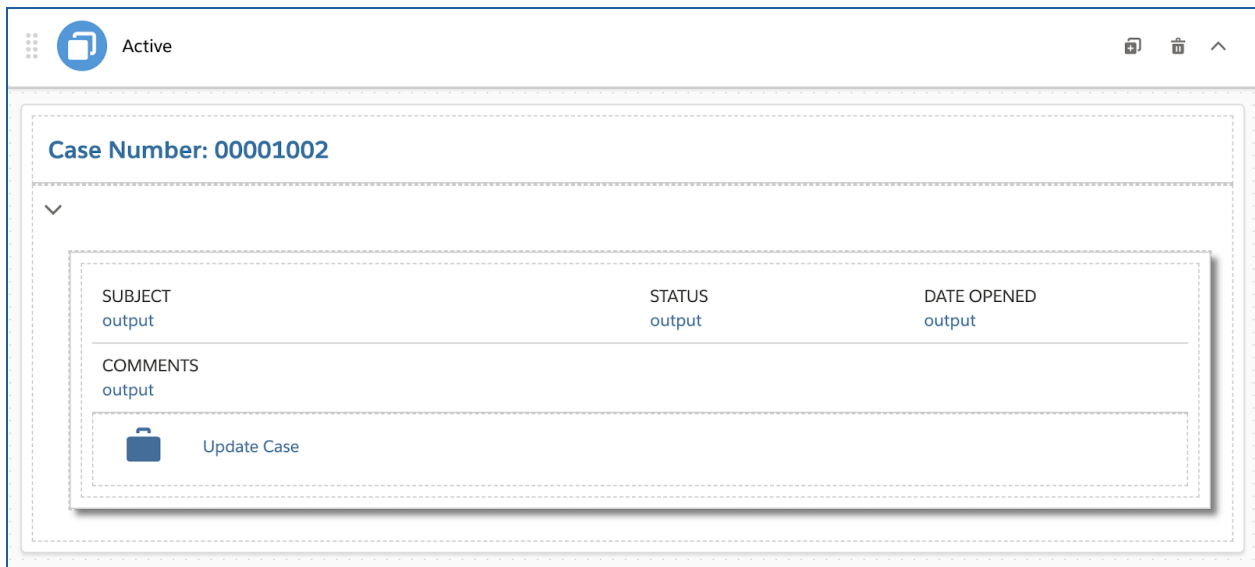
- c. **Activate**. You don't need to set Publish Options for this FlexCard.
 - d. Click **Done**.
4. Embed the **teamCases** child FlexCard in the **teamCasesParent** FlexCard and activate it.
- a. Go to the **OmniStudio FlexCards** tab.
 - b. Refresh your browser window and confirm **teamCases** displays as **Active**.
 - c. Open the **teamCasesParent** FlexCard.
 - d. Go to the **Setup** panel and scroll to the **DATA SOURCE** section. Verify the following information:

Field	Value
Data Source Type	Integration Procedures
Name	team_getCaseList
Input Map > Key	AccountId
Input Map > Value	{recordId}

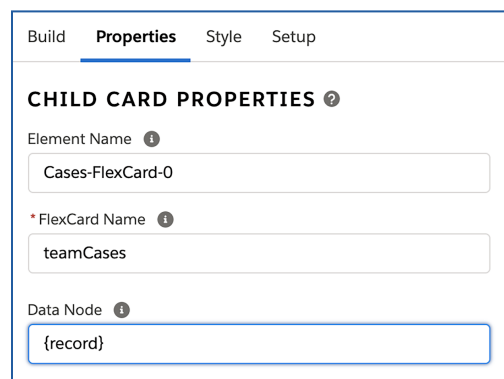
The **Cases** block is already **Collapsible** and **Collapsed By Default**. The only thing left to do is to add the child FlexCard and pass the parent data.

- e. Expand the **Cases** block. Go to the **Build** panel and drag a **FlexCard** element inside it.

- f. Locate the **FlexCard Name** field.
- g. Start typing `team` and select **teamCases**. Refresh the page if you don't see it in the list, but remember if you do refresh that the empty FlexCard element is already in the block.



- h. The child FlexCard is now embedded, but you only see the placeholder **output** text.
- i. Read the tooltip next to the **Data Node** field. To pass the parent data to the child, you must select a data node. In this case, you want to use **{record}** to pass all the data available for the applicable fields.



- j. **Preview** the FlexCard. Expand the case, **Case 00001002**.

- k. Click **Activate**.
- l. Click **Publish Options** and verify that the targets **App Page**, **Home Page**, and **Record Page** are selected. Close the dialog box by clicking **Cancel** or **Save**.