ProTech Professional Technical Services, Inc.

Build Guided Experiences with OmniStudio

Course Summary

Description

Discover how to develop engaging, digital-first guided experiences using OmniStudio tools. In this class, our OmniStudio experts will show you how to use FlexCards, OmniScripts, and the OmniStudio Interaction Console to configure applications that elevate the user experience. You'll learn how to retrieve and transform internal and external data using declarative OmniStudio data tools to get a 360-degree view of customer accounts, empowering you to quickly deliver high-quality, consumer-grade experiences that your users expect.

Objectives

At the end of this course, students will be able to:
- Create FlexCards and build an OmniStudio Interaction Console to improve customer experience.
- Create OmniScripts to ensure productive, consistent user engagement.
- Use Integration Procedures to execute complex operations on the server and incorporate external data services.
- Create and modify DataRaptors to get data from Salesforce, transform data, and save data back to Salesforce.
- Create Calculation Matrices and Calculation Procedures to execute data lookups and calculations.

Topics

- Introduction to OmniStudio
- OmniStudio LWC
- FlexCards and OmniStudio Interaction Consoles
- OmniScripts
- Integration Procedures and OmniStudio Data Tools

Audience

Those who can benefit from this course include Platform developers, UI developers, Solution Architects, Technical Architects, and those who are responsible for the setup, configuration, or maintenance of OmniStudio applications or Salesforce industry Cloud apps.

Prerequisites

Students should possess a solid understanding of basic Salesforce concepts and functionality, including Lightning Web Components (LWC). Students should also have experience working with relational databases and familiarity with JSON.

Duration

Five days

Course Outline

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I. *Introduction to OmniStudio*
Explore OmniStudio Tools and Resources

II. *OmniStudio LWC*
Learn the Benefits and Features of OmniStudio LWC and Component Types

III. *FlexCards and OmniStudio Interaction Consoles*
  A. Design and Build Parent Child FlexCards
  B. Assign Data Sources to FlexCards, Including External Data Sources
  C. Configure FlexCard Flyouts to Display Additional Data
  D. Configure Conditions to Display Different FlexCard States
  E. Build an OmniStudio Interaction Console

IV. *OmniScripts*
  A. Design and Build Simple and Complex OmniScripts
  B. Configure OmniScript Elements such as Type Ahead Blocks
  C. Configure Element Properties such as Branching Conditions
  D. Configure Simple Error Checking
  E. Add External Data to an OmniScript
  F. Connect an Interaction Launcher to a Console Toolbar

V. *Integration Procedures and OmniStudio Data Tools*
  A. Learn How OmniStudio uses Salesforce Objects and Fields
  B. Learn How Data Flows Between OmniScripts and Integration Procedures
  C. Build Integration Procedures and DataRaptors for OmniScripts and FlexCards
  D. Use a DataRaptor to Transform FlexCard Data JSONs
  E. Build Calculation Matrices and Procedures
  F. Test and Troubleshoot Components in the OmniStudio interaction Console