

Build Guided Experiences with OmniStudio

OMS435



Join us for a 5-day instructor-led course on designing robust industry-specific solutions with OmniStudio. Learn to build Industry 360, product problem reporting, new customer onboarding, and program eligibility solutions using OmniStudio components. The course will cover implementing FlexCards, utilizing OmniScripts, building Data Mappers, and creating Integration Procedures to deliver digital-first OmniStudio solutions that enhance user experiences, guide user interactions and engagements, and champion industry best practices.

Overview

Who should take this course?

This course is intended for platform developers, user interface (UI) developers, solution architects, and technical architects responsible for configuring and maintaining OmniStudio and Salesforce Industry Cloud applications. Students must understand basic Salesforce features and functionality, including Lightning Web Components (LWCs), relational databases, and JavaScript Object Notation (JSON). While it's beneficial, holding the Salesforce Administrator or Salesforce Platform Developer I credential is not required. This course is also suitable for anyone interested in obtaining the Salesforce Certified OmniStudio Developer credential.

When you complete this course, you will be able to:

- ✓ Implement FlexCards on page layouts to improve the user experience.
- ✓ Design OmniScripts to guide user interactions, productivity, and engagement.

About CloudWise

We offer Authorized Salesforce training with several guaranteed-to-run classes each month. We are an industry-leading authorized Salesforce training provider and part of Layer 8 Training.

- ✓ Build Integration Procedures that enact complex server-side operations and incorporate external data sources.
- ✓ Customize Data Mappers to pull data from and save it back to Salesforce, and trim and transform data before sharing with OmniStudio tools.
- ✓ Identify relevant Flow for Industries processes and services.
- ✓ Build Industry 360, problem reporting, customer onboarding, and product and program eligibility solutions using OmniStudio components.
- ✓ Design OmniStudio solutions that solve for specific requirements.
- ✓ Adjust OmniStudio solutions based on changing business requirements.

Lessons & Topics



Introduction to Industry 360 and OmniStudio

- Define Industry 360
- Describe OmniStudio
- Use OmniStudio for Industry 360 Solutions
- Examine OmniStudio's Data Model and Architecture



Introduction to Additional Flow for Industries Processes and Services

- Define the Business Rules Engine (BRE)
- Review Lookup Tables
- Understand Expression Sets
- Review Decision Explainer
- Describe Document Generation (Doc Gen)
- Review Client-Side Processing
- Explore Server-Side Processing
- Define Intelligent Document Reader
- Describe the Data Processing Engine

OmniStudio Components

- Define OmniStudio Components
- Examine Component Types
- Review Component Best Practices
- Navigate Component Designers



Parent and Child FlexCards in Industry 360 Solutions

- Examine an Industry 360 Use Case
- Implement Different FlexCards in an Industry 360 Solution
- Define Parent and Child FlexCards
- Examine Parent and Child FlexCard Relationships
- Review Parent and Child FlexCard Data Sources
- Build and Style a Child FlexCard
- Create FlexCard States
- Embed a Child FlexCard in a Parent Card
- Build an Industry 360 Lightning Application to Deploy FlexCards



Problem Reporting with OmniStudio

- Examine a Problem Reporting Use Case
- Design a Problem Reporting Solution
- Build a Data Mapper to Display Asset and Account Data
- Create a Simple OmniScript to Capture Case Data
- Configure a File Upload Element
- Create a Type Ahead Block
- Refine the OmniScript User Experience
- Create a Branching Integration Procedure
- Test and Deploy the OmniScript Using a FlexCard



Lessons & Topics



Customer Onboarding with OmniStudio

- Define Industry 360
- Examine a Customer Onboarding Use Case
- Examine and Complete an In-Progress OmniScript
- Configure Conditional Views
- Implement a Repeating Block
- Implement Text Blocks
- Build Error Checking
- Create an Integration Procedure with a Data Mapper Transform
- Design a Confirmation Step with a Lookup Element
- Use an OmniScript's JSON to Create a Data Mapper Load
- Deploy the OmniScript on an Application Home Page

Product and Program Eligibility with OmniStudio



- Discuss Product and Program Eligibility Use Cases
- Examine a Service Level Agreement (SLA) Use Case
- Build an SLA OmniScript
- Embed a FlexCard in the OmniScript
- Create Branching with a Set Values Element Expression Editor
- Build an Expression Set and Calculate Discounted Pricing
- Configure a Disclosure Element
- Seed Data Using a Set Values Element
- Create an Opportunity with a Data Mapper Load
- Deploy the OmniScript on a Record Detail Page



Solution Adjustments in Response to Changing Requirements

- Extend and Customize Standard OmniStudio Components
- Update FlexCards and Their Data Sources
- Adjust OmniScripts and Their Data Sources
- Import and Export Data Using DataPacks and MultiPacks



Customer Onboarding with OmniStudio

- Design an OmniStudio Solution for Specific Requirements

Contact us for upcoming classes and pricing:

Email: register@cloudwiselearning.com

Phone: 888-504-8872

