BUILD GUIDED EXPERIENCES WITH OMNISTUDIO (OMS435)

OVERVIEW

Discover how to design robust industry-specific solutions with OmniStudio. In this 5-day class, learn how to build Industry 360, product problem reporting, new customer onboarding, and program eligibility solutions using OmniStudio components. Implement FlexCards, utilize OmniScripts, build DataRaptors, and create Integration Procedures to deliver digital-first OmniStudio solutions that provide an enhanced user experience, guide user interactions and engagements, and champion industry best practices.

WHO SHOULD TAKE THIS COURSE?

This class is designed for platform developers, UI developers, solution architects, and technical architects who are responsible for the setup, configuration, or maintenance of OmniStudio applications and Salesforce Industry Cloud apps. This is also a great class for anyone looking to earn their Salesforce Certified OmniStudio Developer credential.

WHEN YOU COMPLETE THIS COURSE, YOU WILL BE ABLE TO:

- Create and deploy FlexCards on page layouts to improve the user experience.
- Create and deploy OmniScripts to guide user interactions, productivity, and engagement.
- Build Integration Procedures to execute complex server-side operations and incorporate external data sources.
- Implement and modify DataRaptors to pull data from and save it back to Salesforce, in addition to trimming and transforming data before it is shared with OmniStudio tools.
- Identify additional Flow for Industries Processes and Services that may be used in Industries solutions.
- Build Industry 360, problem reporting, customer onboarding, and product and program eligibility solutions using OmniStudio components.
- Design OmniStudio solutions that solve for specific requirements and adjust solutions accordingly when requirements are changed.

DURATION
5 days

DELIVERY FORMAT
- Classroom
- Virtual

LANGUAGE
Course in French /
Materials in English

USER INTERFACE
Lightning Experience

PREREQUISITES AND PREWORK

Students should have a solid understanding of basic Salesforce features and functionality, including Lightning Web Components (LWC), experience working with relational databases, and familiarity with JavaScript Object Notation (JSON). Students should ideally hold the Salesforce Administrator or Salesforce Platform Developer I credential, although this is not required.

Please complete the following trailmix before attending our expert-led class : Trailmix, Trailhead Academy

IMPORTANT : If you use your personal computer and a configuration is described in the Computer Setup Guide, you must complete it before attending the class.

CERTIFICATION

OMS435 is recommended to prepare Salesforce Certified OmniStudio Developer exam. Other courses and self-study materials are recommended for this exam. The complete list of prerequisites is provided by Salesforce in the Exam Guide. Registration for an inter-company training session entitles you to a voucher to pass the corresponding certification exam. The voucher, valid for 6 to 12 months, is sent to the trainee on request, at no additional cost. Note that this offer is valid for only one voucher per certification; If you register for multiple courses preparing for the same certification, you will be entitled to only one free voucher.

Note :

- Salesforce certification exam doesn't take place during the training and it's up to the delegate to register to the exam via the webassessor
- We don't recommend passing the Salesforce certification exam directly after attending the course. Additional work must be provided

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LESSONS & TOPICS

Introduction to Industry 360 & OmniStudio
- Define Industry 360
- Define OmniStudio
- Utilize OmniStudio for Industry 360 Solutions
- Examine OmniStudio's Data Model and Architecture

Introduction to Additional Flow for Industries Processes & Services
- Define Business Rules Engine (BRE)
- Review Lookup Tables
- Understand Expression Sets
- Review Decision Explainer
- Define Document Generation (Doc Gen)
- Review Client-Side Processing
- Review Server-Side Processing
- Define Intelligent Form Reader
- Define Data Processing Engine

OmniStudio Components
- Define OmniStudio Components: FlexCards, OmniScripts, DataRaptors, and Integration Procedures
- Examine Component Types
- Review Component Best Practices
- Navigate Component Designers

Parent & Child FlexCards in Industry 360 Solutions
- Examine a FlexCard for Industry 360 Use Case
- Implement Different FlexCards in an Industry 360 Solution
- Define Parent and Child FlexCards
- Examine Parent and Child FlexCard Relationships
- Examine 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 DataRaptor 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

Customer Onboarding with OmniStudio
- Examine a Customer Onboarding Use Case
- Examine and Complete an In-Progress OmniScript
- Configure Conditional Views
- Configure a Repeating Block
- Configure Text Blocks
- Configure Error Checking
- Create an Integration Procedure with a Loop Block and DataRaptor Transform
- Create a Confirmation Step with a Lookup Element and Embedded FlexCard
- Use OmniScript's JSON to Create a DataRaptor Load
- Deploy the OmniScript on an Application Home Page

Product & Program Eligibility with OmniStudio
- Discuss Product and Program Eligibility Use Cases
- Examine a Service Level Agreement (SLA) Use Case
- Build a SLA OmniScript
- Embed a FlexCard in the OmniScript
- Create Branching with a Set Values Element Expression Editor
- Calculate Discounted Pricing Using a Pre-Built Expression Set
- Configure a Disclosure Element
- Seed Data Using a Set Values Element
- Create an Opportunity Using a DataRaptor 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
- Update OmniScripts and Their Data Sources
- Import and Export Data Using DataPacks and MultiPacks

Capstone Activity
- Design an OmniStudio Solution Based on Specific Requirements

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Learn the Foundations of AI
Trailhead Academy classes include a lesson where you'll learn AI concepts, responsible AI practices, and how to use AI and Salesforce together to drive productivity.

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