

# BUILD GUIDED EXPERIENCES WITH OMNISTUDIO (OMS435)



## OVERVIEW

Discover how to design robust industry-specific solutions with OmniStudio. In this 5-day instructor-led 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 Data Mappers, and create Integration Procedures to deliver digital-first OmniStudio solutions that enhance user experience, guide user interactions and engagements, and champion industry best practices.

## WHO SHOULD TAKE THIS COURSE?

This course is designed for platform developers, user interface (UI) developers, solution architects, and technical architects who are responsible for configuring and maintaining OmniStudio and Salesforce Industry Cloud applications. This is also a great course for anyone interested in earning their 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.
- Build Integration Procedures to execute 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 it is shared 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.

## PREREQUISITES AND PREWORK

Students should have a solid understanding of basic Salesforce features and functionality, including Lightning Web Components (LWCs), relational databases, and JavaScript Object Notation (JSON). They 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



**DURATION**  
5 days

**DELIVERY FORMAT**  
- Classroom  
- Virtual

**LANGUAGE**  
Course in French /  
Materials in English

**USER INTERFACE**  
Lightning Experience

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## LESSONS & TOPICS

### Introduction to Industry 360 and 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 and 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 Document Reader
- Describe 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
- 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 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

### 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
- Build Error Checking
- Create an Integration Procedure with a Data Mapper Transform
- Design a Confirmation Step with a Lookup Element
- Use 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 Using 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
- Update OmniScripts and Their Data Sources
- Import and Export Data Using DataPacks and MultiPacks

### Capstone Activity

- Design an OmniStudio Solution Based on Specific Requirements