



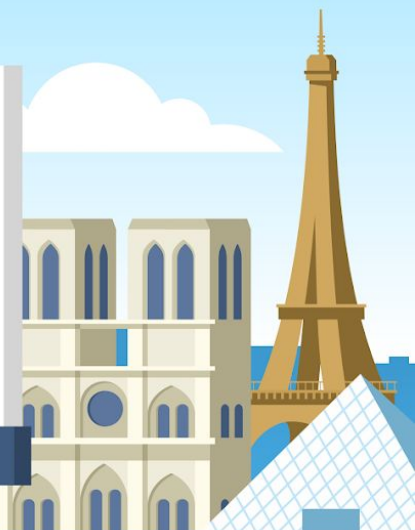
Inside Omnistudio: A Hands-On Guide to Rapid Interaction Design

Luca Belligoli



FrenchTouchDreamin.com

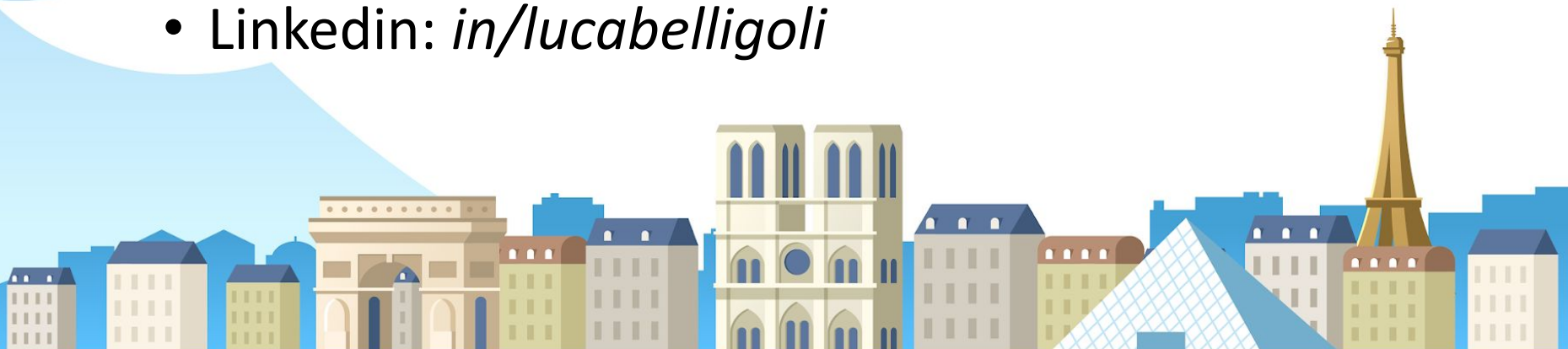
#FTD25





Luca Belligoli

- 7+ years in Salesforce/Salesforce Industries
- ex-Salesforce Professional Services
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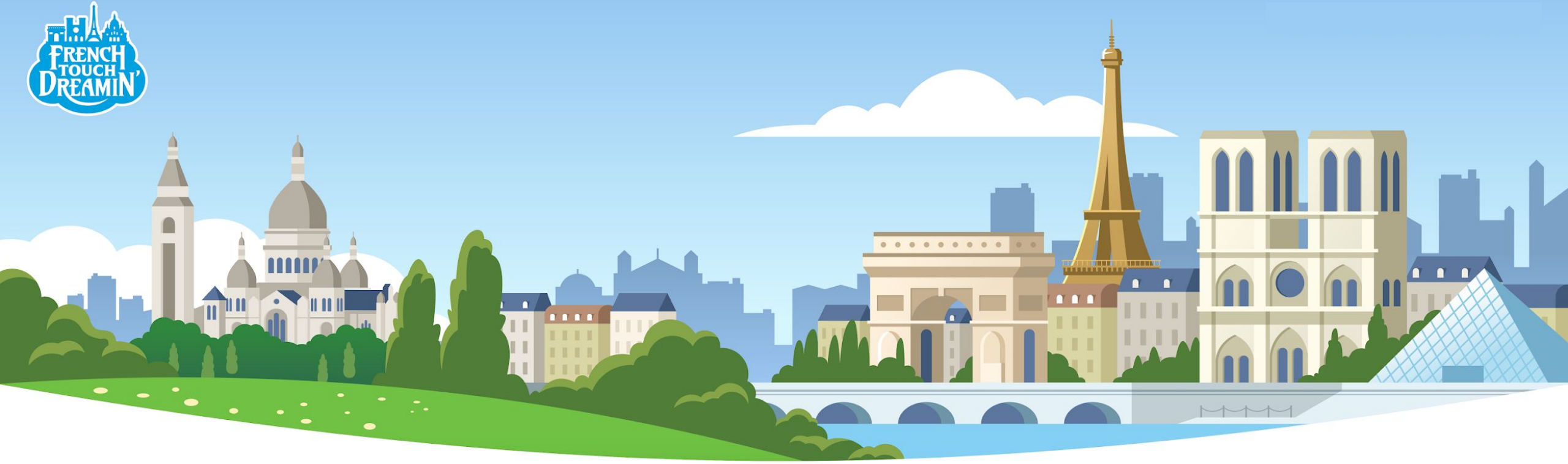




Agenda

- Introductions
- Omnistudio Foundation
- Demo, Best Practices & Quiz Time
- Enablement Resources
- Q&A





Omnistudio Foundation



Yesterday: Omnistudio for Vlocity

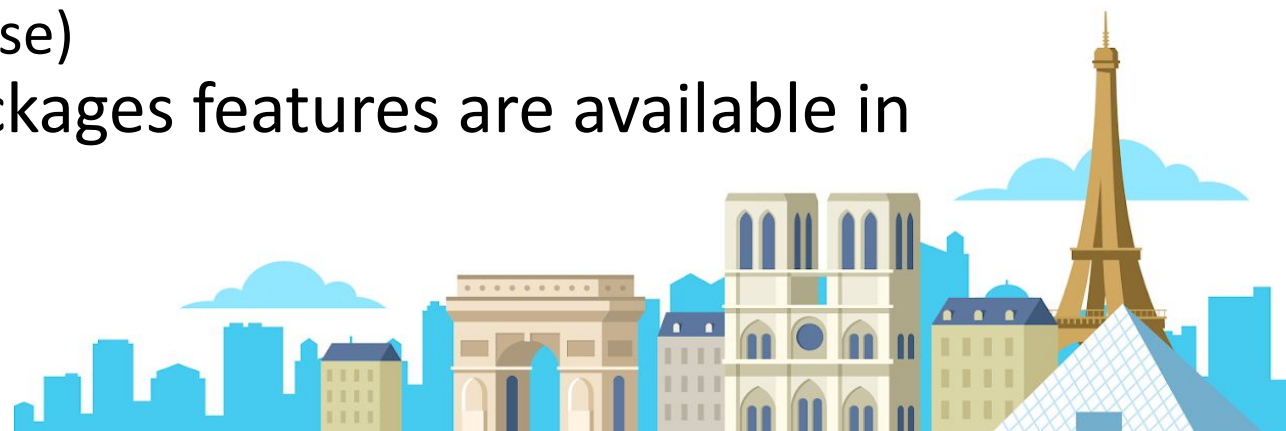
- Originally part of the **Vlocity ecosystem**
- A set of tools for building **Salesforce Industry Cloud apps**
- Includes:
 - Prebuilt **services**
 - Reusable **UI components**
 - Industry-specific **data models**
- Delivered as a **managed package**
 - For **Healthcare, Insurance, Communications, Media, Energy, and Public Sector**
- Built using **custom Salesforce objects**





Today: Standard Omnistudio

- Since Summer '21, Omnistudio is built on the **standard Salesforce data model** for better compatibility and integration.
 - **Standard Omnistudio Data Model**
 - **Standard Omnistudio Run-Time**
- Omnistudio application suite are
 - Flexcards
 - Omniscripts
 - Data Mappers
 - Integration Procedures
 - Business Rules Engine
 - Document Generation (with right license)
- **Not all** Omnistudio for Managed Packages features are available in Standard Omnistudio.





Where I can use Omnistudio?



Communications



Media



Energy & Utilities



Public Sector



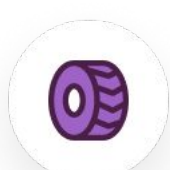
Net Zero



Revenue Cloud



**Financial
Services**



Automotive



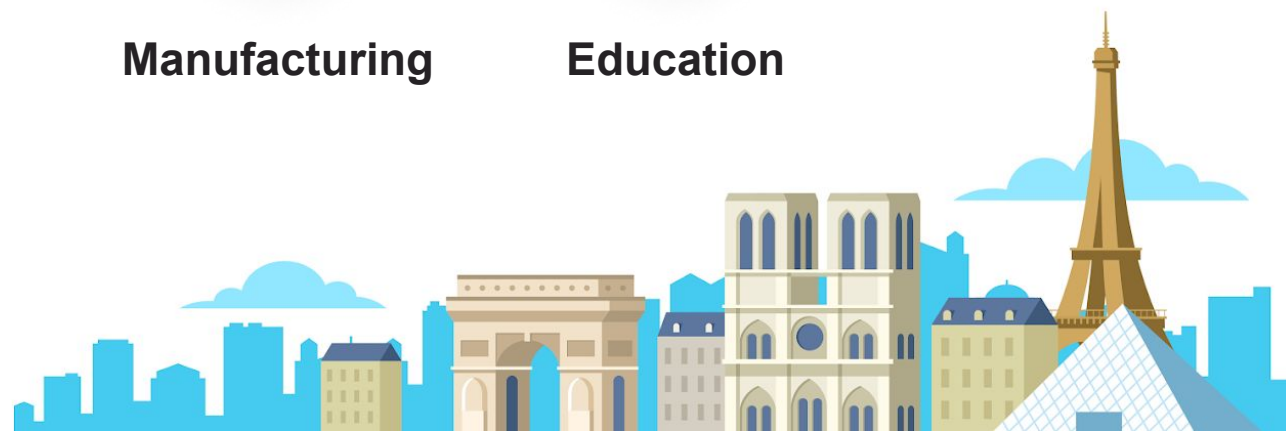
Health



Manufacturing



Education





Omnistudio Components



Data Mapper

Extract, transform, and load (ETL) data.

Types: Turbo Extract, Extract, Transform, Load



Integration Procedure

Orchestrate multi-step server-side processes.



FlexCard

Display contextual information at a glance.



Omniscrypt

Guide users through business processes.





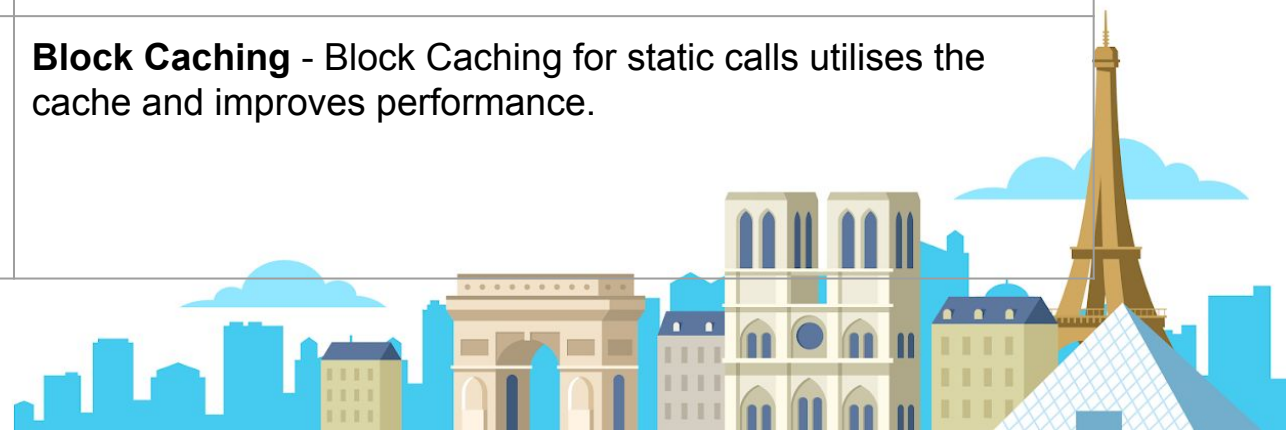
DEMO





Best Practices

Manipulate JSON with Send/Response Transformation properties - cut down the payload size of request by trimming the JSON requests.	Naming Convention - Omnistudio components name can only include alphanumeric characters and cannot contain spaces or special characters such as underscores.
Use IP to optimize performance by minimizing server round trips - combining multiple DataMappers, handling common CPQ operations, or performing SOAP/REST API calls. Leverage Long Running Transactions for time-consuming processes (<i>chainable and queueable chainable</i>).	Invoke Mode - For Omniscript actions, choose the Invoke Mode as applicable instead of leaving them in 'default' mode: • <i>Default</i> - Blocks the UI and loads calls sequentially. • <i>Non-Blocking</i> - Executed async. and response is returned to the UI. • <i>Fire and Forget</i> - Executed async and has no callback to the UI.
Limits Objects in DR - in DataMapper Extract, target only a limited number of objects (not more than 3) to improve performance. Use <i>FILTER</i> and <i>ORDER BY</i> only on Indexed fields. Use DataMapper Turbo Extract whenever is possible.	Use Formula Fields in DR - uses a client-side JavaScript expression engine that is evaluated in the browser and allows for fast, real-time applications.
Caching - using Cache to store frequently accessed, infrequently updated DataMapper and IP data. It saves round trips to the database and improves performance.	Block Caching - Block Caching for static calls utilises the cache and improves performance.





Quiz Time

1. What is the primary purpose of an Integration Procedure in OmniStudio?

- A. To format data for display in a UI.
- B. To create and manage reusable UI components.
- C. To orchestrate multiple backend operations and reduce server roundtrips.
- D. To define Salesforce object relationships.

✓ Correct Answer: **C**

3. When should you consider the “Long Running Transaction” settings in an Integration Procedure?

- A. For short, synchronous data lookups.
- B. When handling backend processes that take time and do not require immediate user feedback.
- C. For operations that must complete instantly.
- D. Only when debugging a script.

✓ Correct Answer: **B**

2. Which of the following is a best practice when naming OmniScript UI elements?

- A. Use full descriptive sentences.
- B. Include spaces for readability.
- C. Prefix with numbers for sorting.
- D. Avoid spaces and use consistent naming (e.g., AccountType).

✓ Correct Answer: **D**

4. Jon wants to fetch some Account details to display on his Omniscrit. Which tool Jon could leverage?

- A. DataMapper Extract
- B. Integration Procedure
- C. DataMapper Turbo Extract
- D. Omniscrit

✓ Correct Answer: **C**





Find Out More

Let's Unwrap the Goodies! 🎉

- To learn more about the setup visit [Salesforce Help documentation](#)
- On Trailhead, start with [Build Guided Experiences with Omnistudio](#) trail and [Omnistudio Developer Tools](#) module
- To access hands-on videos, check out the Omnistudio Apex Hours series:
 - [Getting Started with Omnistudio](#)
- Certifications:
 - [Omnistudio Consultant](#)
 - [Omnistudio Developer](#)





Thanks for attending this session!

*Any
Questions?*

