



OmniStudio: A Beginner's Guide to Declarative Power

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#LDNsCall #LC25



Agenda



- Introduction
- Omnistudio Foundation
- Quiz
- Enablement Resources
- Q&A

Luca Belligoli

- 7+ years in Salesforce/Salesforce Industries
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- 14x Certifications, 3x Accredited Professionals
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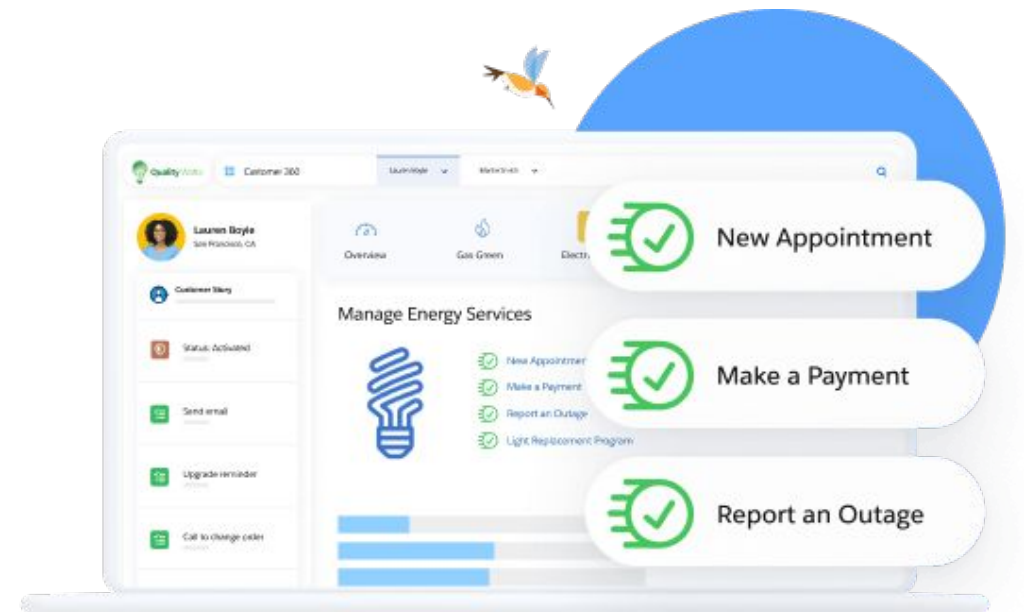


What is Omnistudio?

Omnistudio is a **suite of digital engagement tools** that simplify the creation of complex, industry-specific experiences on Salesforce.

It enables architects and developers to create **scalable, efficient, and user-friendly** applications through a **low code** environment.

Omnistudio provides set of **services, components** and **predefined data model objects** that combine to create industry specific solutions.



Where can I use Omnistudio?



Communications



Media



Energy & Utilities



Public Sector



Net Zero



Revenue Cloud



**Financial
Services**



Automotive



Health



Manufacturing



Education

Omnistudio Components



Omniscript

Guide users through business processes.



FlexCard

Display contextual information at a glance.



Integration Procedure

Orchestrate multi-step server-side processes.



Data Mapper

Extract, transform, and load (ETL) data.

Types: Turbo Extract, Extract, Transform, Load

Omnistudio Stack



Service Management



Integration
Procedures



Data Mappers

Digital Experience



FlexCards



OmniScripts

Developer Experience

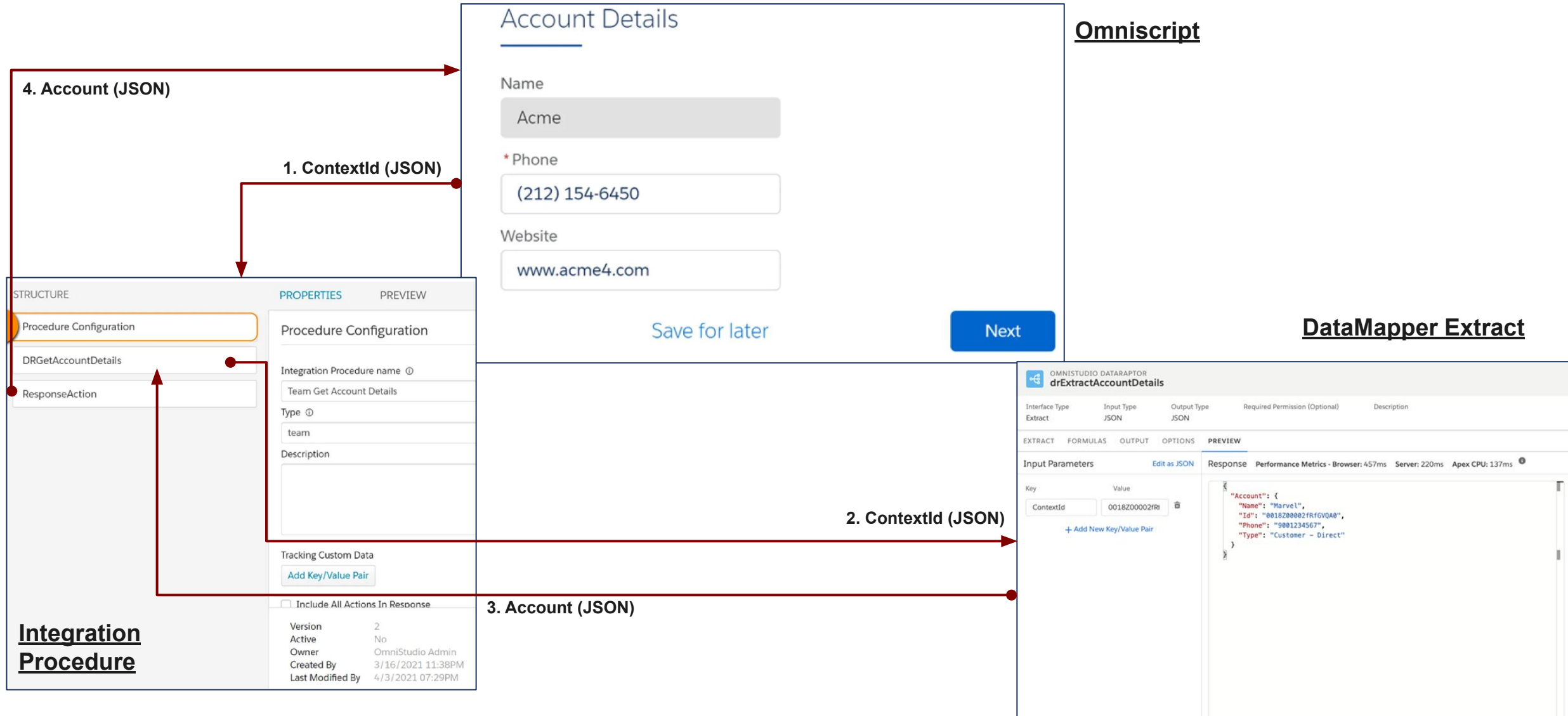


IDX Build Tool



IDX Workbench

Use Case - Get Account Details



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. adn 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

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

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

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](#)



Q&A

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Thank You

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