

## Build Guided Experiences with Omnistudio (OMS435)

OEM: Salesforce • Code: OMS435

### COURSE DESCRIPTION

Discover how to design robust industry-specific solutions with Omnistudio. In this 5-day instructor-led course, 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 in order to deliver digital-first Omnistudio solutions that enhance user experiences, guide user interactions and engagements, and champion industry best practices.

From February 2026 this course uses the Omnistudio Standard designers.

### AUDIENCE PROFILE

- 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.

### PREREQUISITES

- 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.
- Complete the required Trailhead prework — "Build Guided Experiences with Omnistudio (OMS435) Prework" — before the session starts.

### COURSE OBJECTIVES

**By the end of this course, participants 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 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.

## COURSE OUTLINE

### Module 1: Introduction to Industry 360 and Omnistudio

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

### Module 2: Introduction to Additional Flow for Industries Processes and Services

- Define the Business Rules Engine (BRE)
- Review Lookup & Decision 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

### Module 3: Omnistudio Components

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

### Module 4: 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

## Module 5: 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 Omniscrypt to Capture Case Data
- Configure a File Upload Element
- Create a Type Ahead Block
- Refine the Omniscrypt User Experience
- Create a Branching Integration Procedure
- Test and Deploy the Omniscrypt Using a Flexcard

## Module 6: Customer Onboarding with Omnistudio

- Examine a Customer Onboarding Use Case
- Examine and Complete an In-Progress Omniscrypt
- 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 Omniscrypt's JSON to Create a Data Mapper Load
- Deploy the Omniscrypt on an Application Home Page

## Module 7: Product and Program Eligibility with Omnistudio

- Discuss Product and Program Eligibility Use Cases
- Examine a Service Level Agreement (SLA) Use Case
- Build an SLA Omniscrypt
- Embed a Flexcard in the Omniscrypt
- 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 Omniscrypt on a Record Detail Page

## Module 8: Solution Adjustments in Response to Changing Requirements

- Extend and Customize Standard Omnistudio Components
- Update Flexcards and Their Data Sources
- Adjust Omniscrypts and Their Data Sources

## Module 9: Capstone Activity

- Design an Omnistudio Solution for Specific Requirements