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About the Author



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Live, Eat, and breathe Salesforce

- Salesforce **Certified Veteran**
- **Strategist** of ISV & OEM Apps, Salesforce **Solution Consultant**
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REPUTATION	9+ SINCE INCEPTION	5.0 ★★★★★ CSAT REVIEWS	REVIEWED ON Clutch ★★★★★ 20 REVIEWS	Summit (Platinum) Partner	REGISTERED BY partner	SALESFORCE available on AppExchange	EMPLOYER	TOP Cloud Consulting Company	TOP APP EXCHANGE COMPANY	CERTIFIED ISO 9001:2015

How to Setup a Path and Guidance of Success in Salesforce

Let's have a look at the steps to implement a Salesforce Path along with setting the Guidance of Success for the user.

Step 1: Create a New Record Type

Start with creating a New Record Type on the object on which you would like to create the Path. You have to set up the sales process to be followed for the new Record Type.

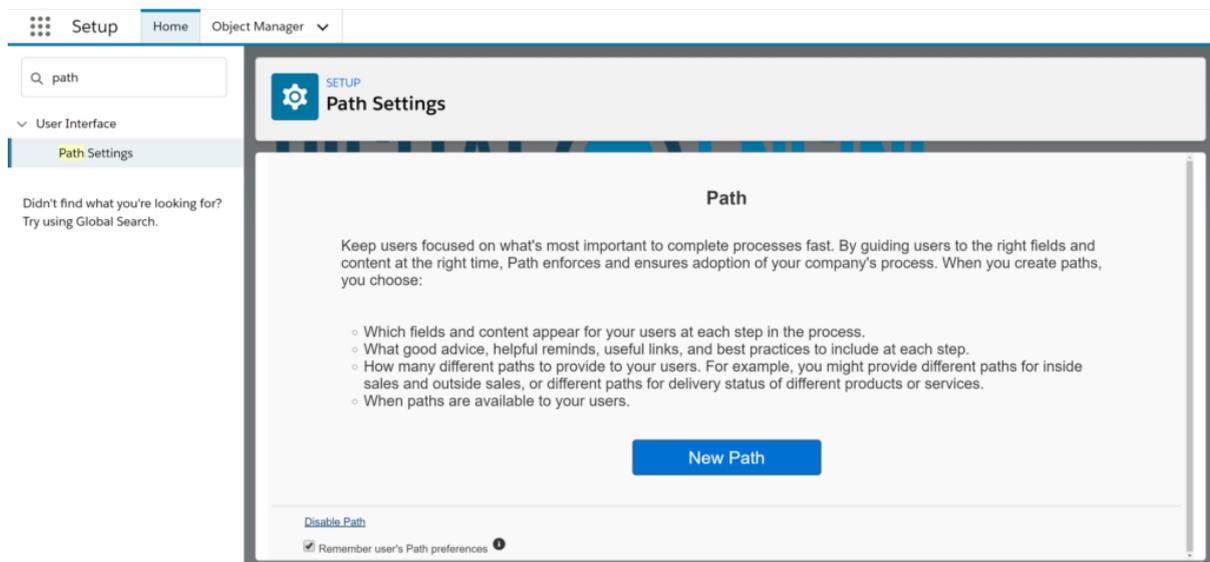
Creating the record type and the process is important as the Path uses Picklists from the object as the points along the Path. If the Path does not have its own Record Type and Process and you have multiple opportunity user cases, it can lead to issues.

Step 2: Enable the Path

Navigate to Setup and type "Path" in the Quick Find Box. You'll reach Path Settings. After you've selected Path Setting, select Enable.

You have to choose whether the path should remember its previous state by selecting Remember User's Path Preferences. If not selected, details of the path will stay hidden when the page loads.

Click New Path.



Step 3: Create the Path

In this step, you'll have to provide the information that is required for creating the Path. Set a unique name, choose the Object on which you'll use the Path, select the Record Type, then choose which Picklist will be used for the Path.

Select Next to proceed.

salesforce

Setup

Name and Record Type Fields and Text Finish

Step 1: Name Your Path and Choose an Object

The object and record type you choose determine the business process for your users.

Path Name

API Reference Name

Object

Record Type

Picklist

Next

Step 4: Select Key Fields

You have to select up to five key fields, for each stage and provide any guidance. The character limit for the guidance is 1,000 characters.

The Guidance for Success Section can be linked with Files that are shareable in Salesforce. This can be important as if a document needs to be shared with the client.

After adding all the required information, select Next to proceed.

salesforce

Setup

Name and Record Type Fields and Text Finish

Step 2: Select Fields and Provide Guidance for Each Step in the Path

For each step in the process:

- Select fields that you want to appear for your users.
- Provide guidance for success, like tips, links to Chatter groups or files, best practices, and policy reminders.

Choose Your Path Own It Provide Value Differentiate Yourself Closed Won Closed Lost

Fields
Account Name
Description
Next Step
Quantity

+ Add/Update Fields

Guidance for Success

Please Provide information for the fields in the left to proceed.

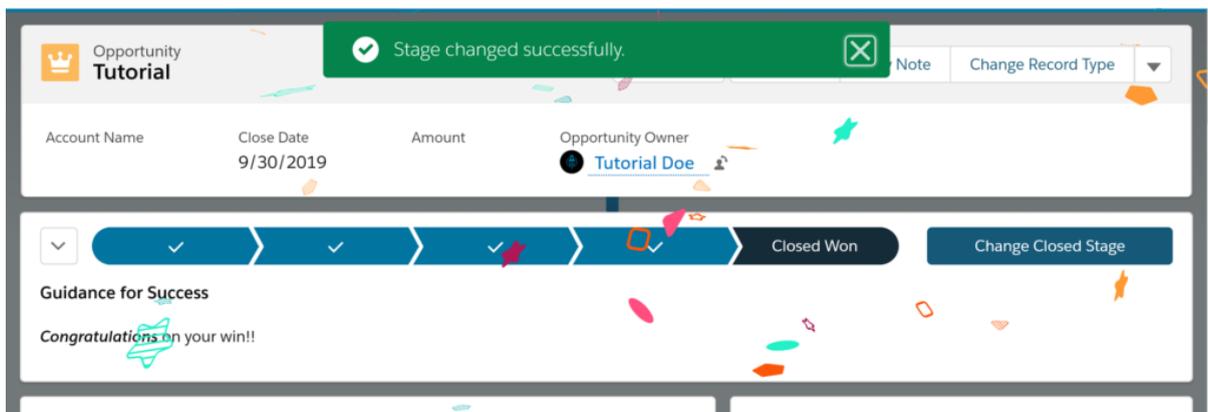
Number of characters remaining: 928

Back Next

Step 5: Activate the Path

You can choose whether or not to add a fun confetti animation at a completed stage and whether you want to activate your Path.

The screenshot shows the Salesforce Path Setup interface for Step 3. At the top, a progress bar indicates the current step is 'Fields and Text', with 'Name and Record Type' and 'Finish' also visible. The main heading is 'Step 3: Set Up Celebration, Activate, and Save'. Below this, there are two sections: 'A. When users reach a specific step in the path, help them celebrate their success with on-screen confetti.' and 'B. Activate your path. If you aren't ready to make this path available now, you can still save it and activate it later.' Section A includes a toggle switch that is turned on, a 'Picklist Values' section with two columns: 'Available' (listing 'Choose Your Path', 'Own It', 'Provide Value', 'Differentiate Yourself', and 'Closed Lost') and 'Selected for Celebration' (listing 'Closed Won'), and a 'Celebration Frequency' section with radio buttons for 'Rarely', 'Sometimes', 'Often', and 'Always' (which is selected). Section B includes a toggle switch that is also turned on. At the bottom, there are 'Back' and 'Finish' buttons.



Step 6: Create Additional Salesforce Paths (optional)

Now you can create as many Paths on objects you want and can add value to the users following them.

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