Easy CS – Installation Guide

How to Activate and Configure Path for Customer Success Plans, Engagements, and Voice of Customer

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Introduction

After installing Easy CS, follow these simple steps to enable and configure the Path functionality in your Salesforce organization. Paths help your team visually manage stages for Customer Success Plans, Engagements, and Voice of Customer records.

Step 1 – Activate Path

1. Go to **Setup** (gear icon in the upper right).
2. In the Quick Find box, type **Path Settings**.
3. Click on **Path Settings**.
4. If Path is not already enabled, click **Enable**.
5. Click **Save** if prompted.

Step 2 – Create the Required Paths

Repeat these steps to create a Path for each object:

- **Customer Success Plan**
- **Engagement**
- **Voice of Customer**

For each Path:

1. Click **New Path**.
2. Fill in the following information:
   - **Path Name:**
     - For Customer Success Plan: `Customer_Success_Plan_Path`
     - For Engagement: `Engagement`
     - For Voice of Customer: `Voice_of_Customer`
   - **Object:**
     - Select `Customer Success Plan`, `Engagement`, or `Voice of Customer` as appropriate.
   - **Picklist Field:**
     - Select `Status`.
   - **Record Type:**
     - Select the default record type (if more than one, choose as needed).
3. Click **Next**.
4. For each step, select which key fields to display and enter guidance for users (optional).
5. Click **Next**, review, and then **Activate** your Path.

Step 3 – Add Path to Lightning Record Page (if not already visible)

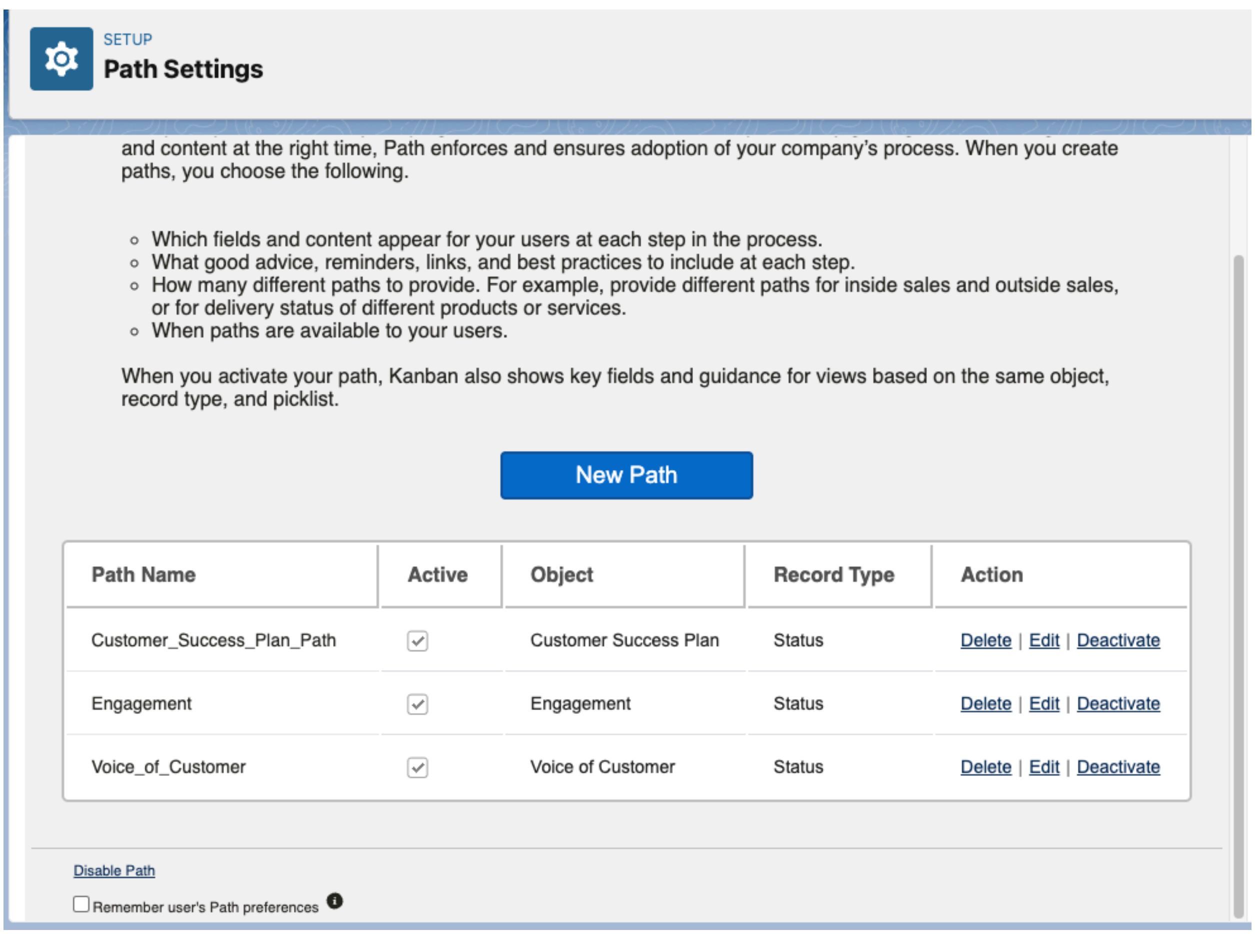
1. Open a record for each object (e.g., open any Customer Success Plan).

2. Click the gear icon and select **Edit Page**.
3. In the Lightning App Builder, drag the **Path** component onto the page layout (usually at the top).
4. Click **Save** and **Activate** if required.

Your Paths should now be active and visible!

If you have any questions, refer to our documentation or contact support.

Screenshots



Tip

You can always edit the stages, guidance, and fields in the Path Settings after setup.