

Easy CS – Installation Guide

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

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.
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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

SETUP
Path Settings

and content at the right time, Path enforces and ensures adoption of your company's process. When you create paths, you choose the following.

- Which fields and content appear for your users at each step in the process.
- What good advice, reminders, links, and best practices to include at each step.
- How many different paths to provide. For example, provide different paths for inside sales and outside sales, or for delivery status of different products or services.
- When paths are available to your users.

When you activate your path, Kanban also shows key fields and guidance for views based on the same object, record type, and picklist.

New Path

Path Name	Active	Object	Record Type	Action
Customer_Success_Plan_Path	☒	Customer Success Plan	Status	Delete Edit Deactivate
Engagement	☒	Engagement	Status	Delete Edit Deactivate
Voice_of_Customer	☒	Voice of Customer	Status	Delete Edit Deactivate

[Disable Path](#)

☐ Remember user's Path preferences ⓘ

Tip

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