Welkin's Customizable Path
Brief usage guide

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Overview

Welkin's Customizable Path is a solution that replaces standard Salesforce Path on record pages and helps guiding Salesforce users through different processes in your organization. It could be used to build complex and flexible processes for sales, operations, HR, or any other use cases.

Welkin's Customizable Path provides the following features:

- Allow only certain transitions between statuses of a record without any additional validation rules or development
- Allow/forbid transitions between certain statuses of a record for different profiles/roles
- Build custom "Key fields" screens for each transition, without any limitations on the number of fields on the screen
- Build 2-step transition between different statuses with different screens shown on each step

All these features are configured in a user-friendly, Salesforce-native interface and does not require any development on your side.

Installation

After you install the package you need to assign the following permission sets to your users:

- **Welkin's Customizable Path User** – permission set that should be assigned to all end users who will see and use the component. If this permission set is not assigned to a user – they won't see the component when it will be added to the record (or any other) page.
- **Welkin's Customizable Path Administrator** – permission set that should be assigned to all users who should be able to configure Custom Paths in your organization. It is not required for these users to have System Administrator permissions in Salesforce.

Once these permission sets are assigned to users in your organization you can proceed with configuring Custom Paths according to your needs.

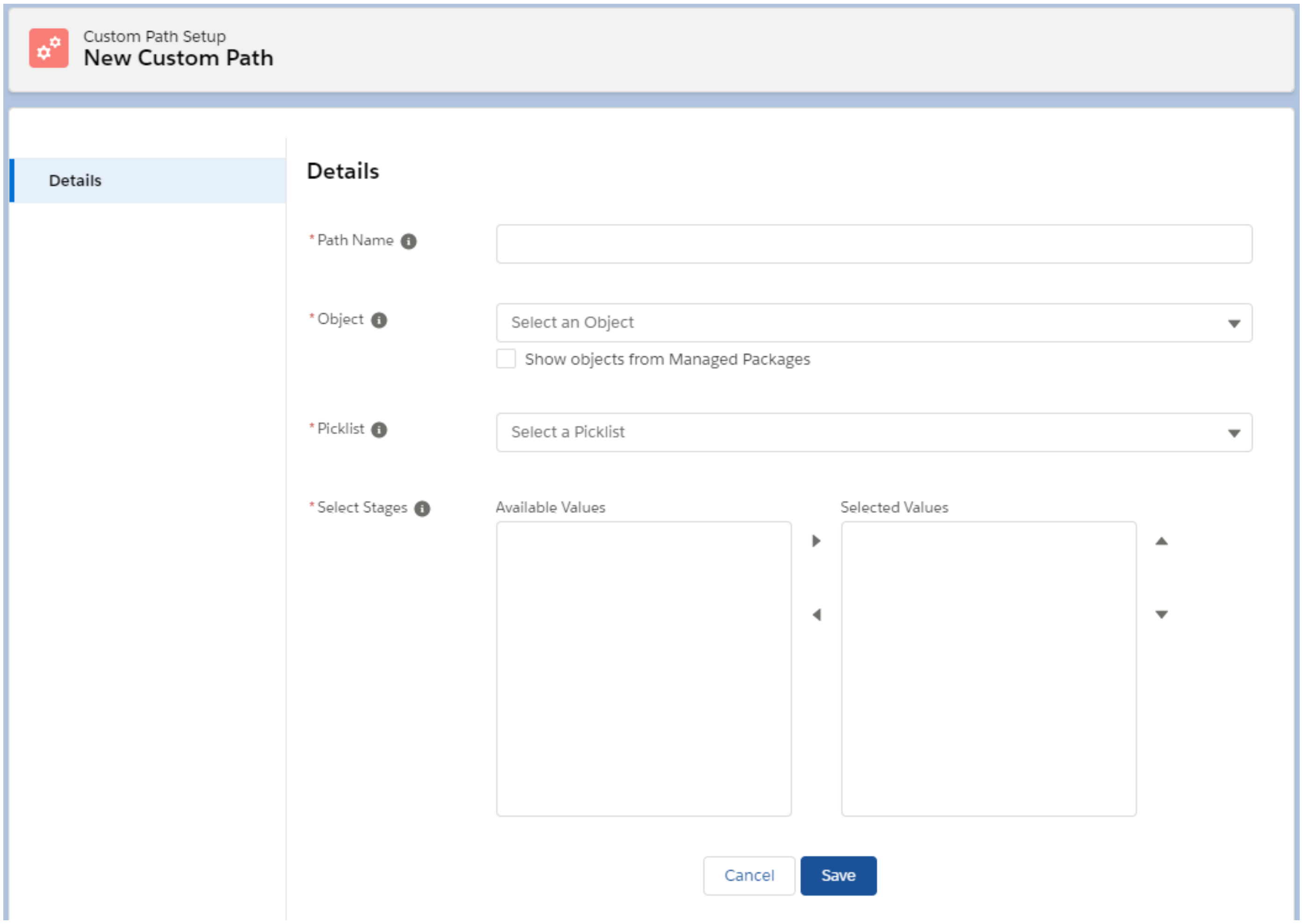
Configuration

All users with the "Welkin's Customizable Path Administrator" permission set will have a new application available for them called "Custom Path Administration". This application is used to create new and configure existing Custom Paths.

Open this application and switch to the “Custom Paths” tab. In it you can see the full list of all your Custom Paths. Click the “New” button to create a new one, or click on a certain Custom Path to edit it.

Creating new Custom Paths

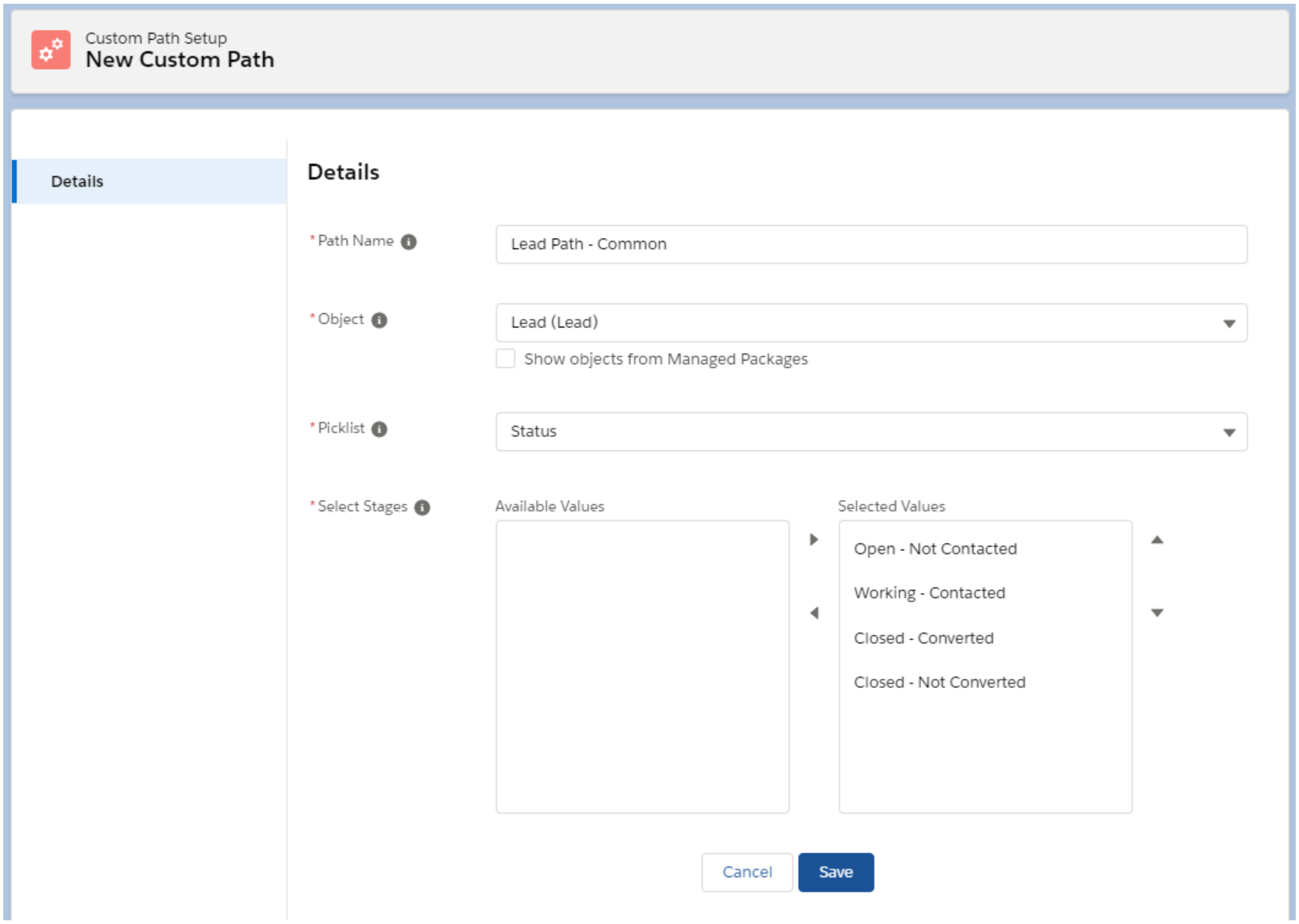
Open the “Custom Path Administration” application, switch to the “Custom Paths” tab and click on the “New” button. You will see the following screen:



First, give a name for your custom path. For example, let us call it “Lead Path – Common”.
As Welkin’s Customizable Path is fully flexible you can build a Custom Path for any object, so proceed with selecting an object. In our case here it will be the standard “Lead” object.

Once you select an object, in the “Picklist” picklist you will see the actual list of picklist fields in the selected object. Choose one that will be used as a status (or its alternative) in the process that you are building. In our example it is the standard “Status” field.

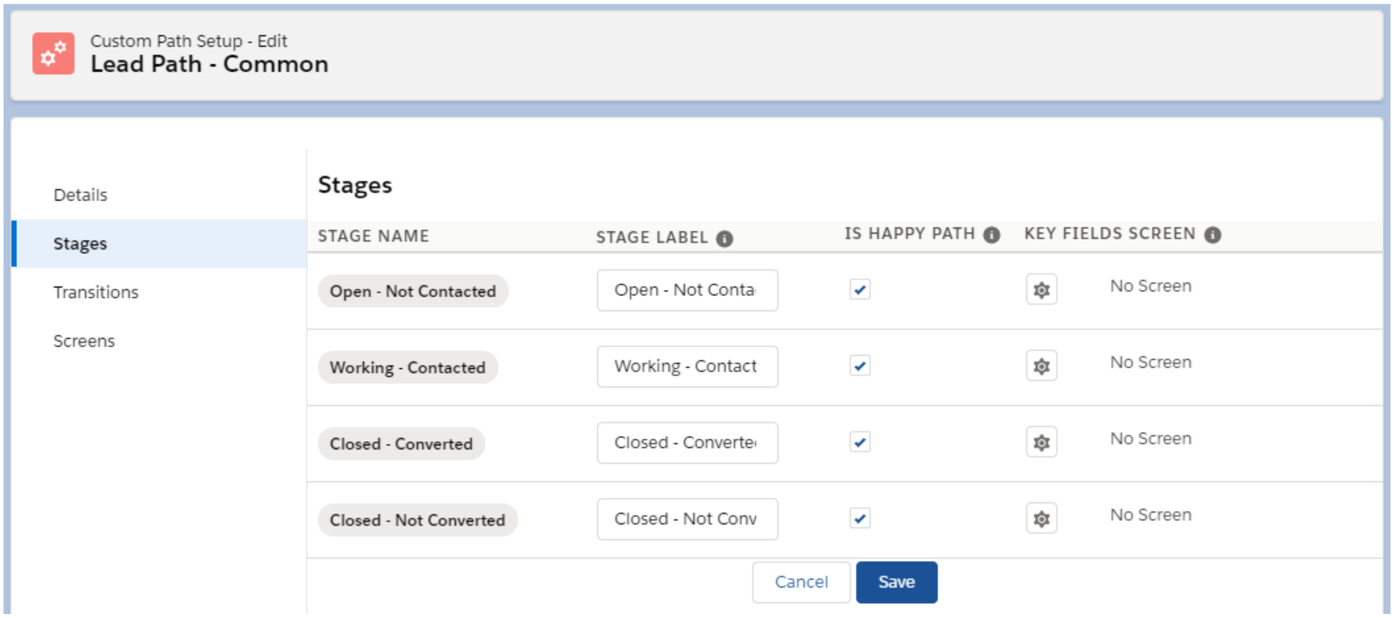
In some cases, you might have more options available in the picklist than you would like to use in your Custom Path. Select only those values that you need in the "Select Stages".



Hit "Save" and an empty Custom Path is created. Now it is time to configure everything about it.

Configuring Stages

When you open any Custom Path configuration object navigate to the “Stages” tab on the left of the screen to configure Stages details. You will see the similar screen:



Here:

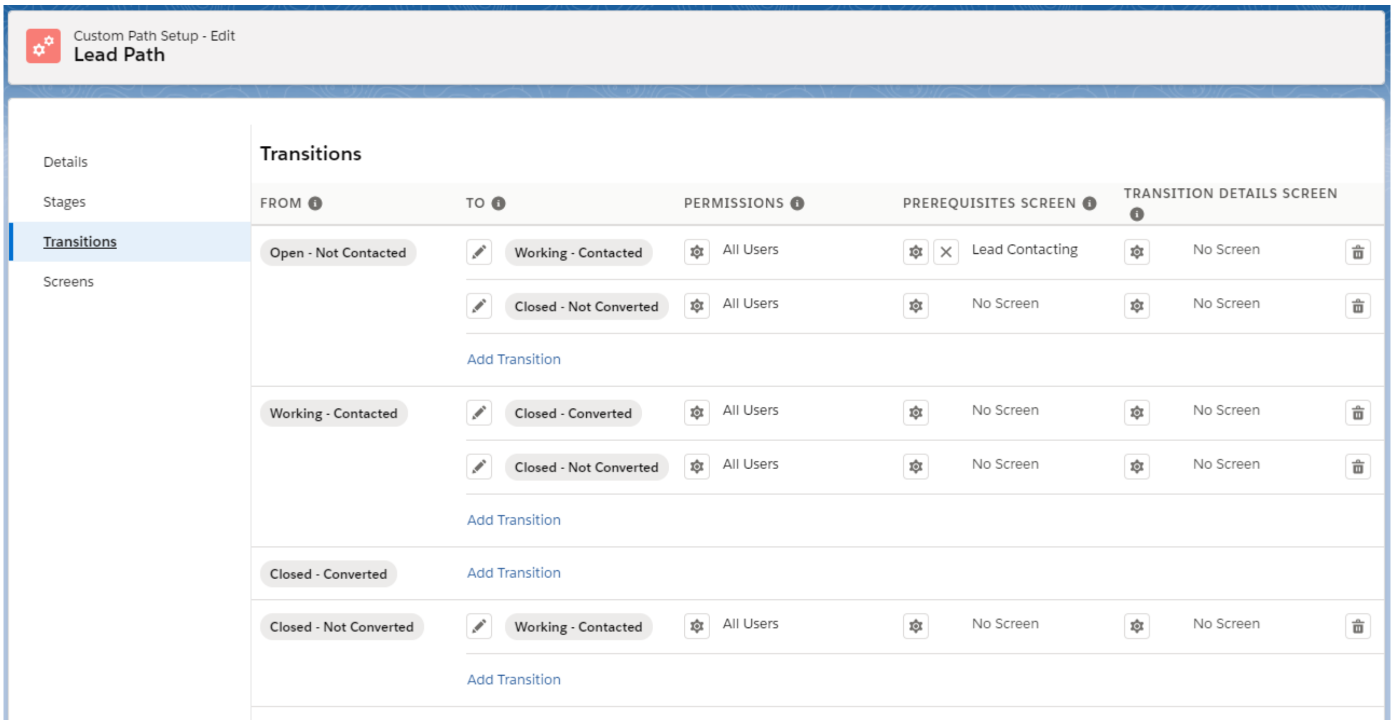
- In the “Stage Name” you see the picklist option label exactly as it’s defined in the field definition
- In the “Stage Label” you can override the label so something different will be shown in the Welkin’s Customizable Path, but the picklist option label in the field will remain as it was before.
- In the “Is Happy Path” column you can determine if a stage is a part of the “happy path” or no. In the Welkin’s Customizable Path stages that are not part of the happy path are shown below the happy path, so users won’t get confused. For example, “Closed – Not Converted” is definitely not a “happy path” stage, “Nurturing” or “Contact Later” could also be treated in the same way.
- In the “Key Fields Screen” column you can define a list of fields (screen) that will be shown when a record is on a certain stage but a user hasn’t selected any other stage on the custom path (e.g. when you open a Lead in the “To Contact” stage you will see a specific set of fields and a guidance what you need to do on this stage).

We will go through creating and configuring screens below.

Configuring Transitions

In the Welkin's Customizable Path by default, you are not able to transition from any status to any other status. Instead, you need to create explicit transitions between statuses. This section will show you how to configure such transitions.

When you open any Custom Path configuration object navigate to the "Transitions" tab on the left of the screen to configure Transitions details. You will see the similar screen:



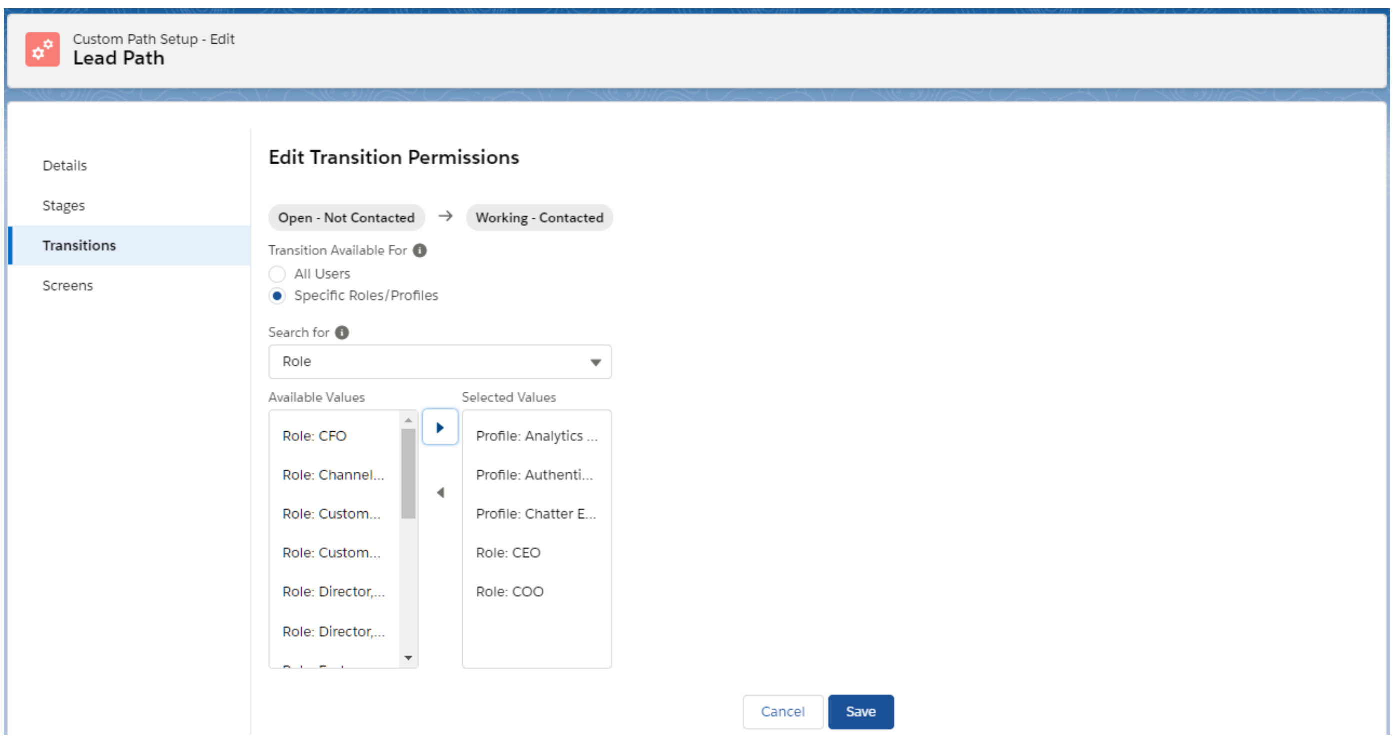
Let us get into the details:

- In the "From" column you see initial stages for transitions. All allowed stages will be shown in the column
- In the "To" column you see "target" stages for existing transitions, or an option to add a new transition from a given "From" status. If you hit on the "Edit" button near the target stage – you can change it.
- In the "Permissions" column you see one of 2 options:
  - "All Users" means that this transition is available for all users
  - "Specific Users" means that there are access limitations for this transition.
- If you click on the "Edit" button in the "Permissions" column you can configure access limitations for the transition. This configuration is described in detail in the section below.

- In the “Prerequisites Screen” column you see the name of the selected screen that will be show for this transition. You can remove this screen association using the corresponding button, or you can assign a different screen or edit a screen if you click on the “Edit” button. Assigning a screen is described in detail in the section below.
- In the “Transition Details Screen” column you see the name of the selected screen that will be shown after the transition is completed. You can remove this screen association using the corresponding button, or you can assign a different screen or edit a screen if you click on the “Edit” button. Assigning a screen is described in detail in the section below.

Configuring permissions for Transitions

When you click on the “Edit” button in the “Permissions” column you will see the following configuration screen:

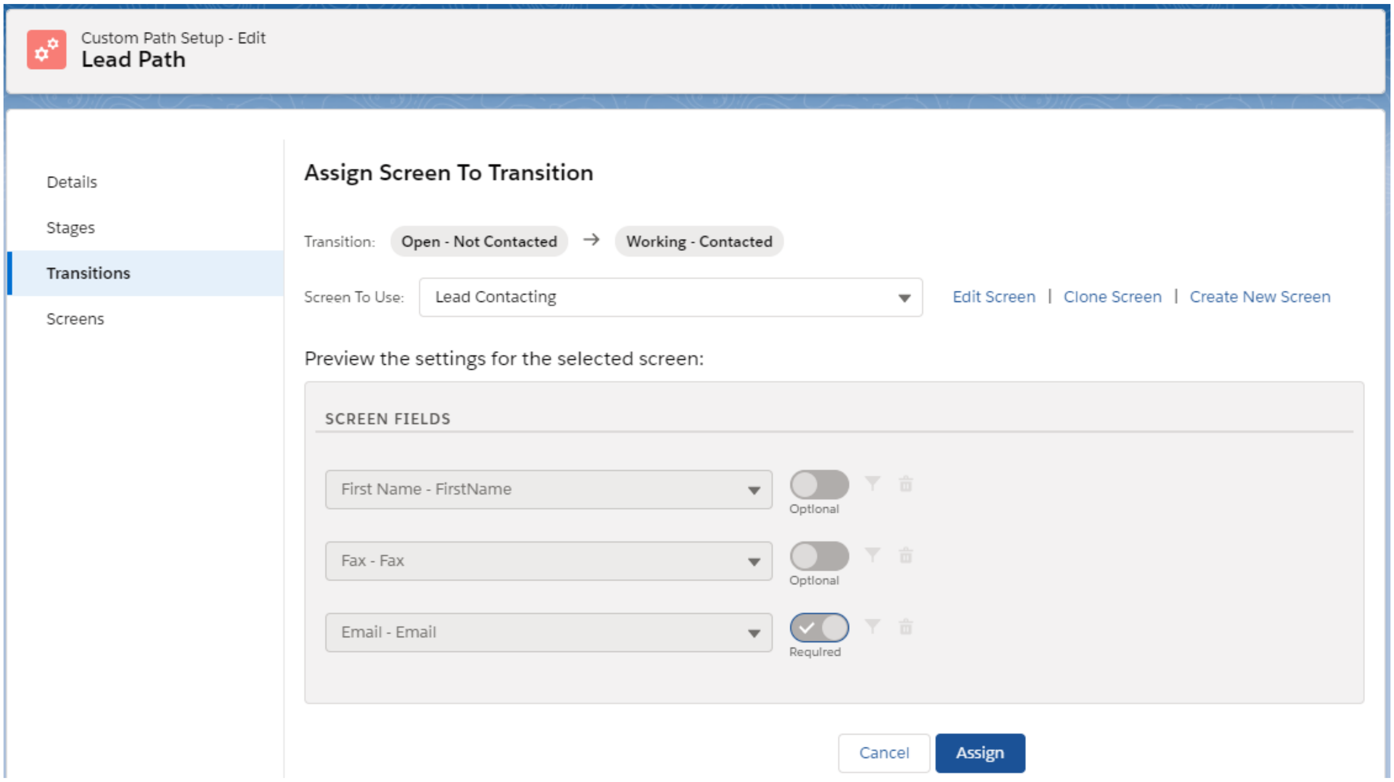


If you select the “All Users” option – this transition will be available for all users.

If you select the “Specific Roles/Profiles” you will be able to allow this certain transition for specific roles and profiles only. To do so you just need to select all Roles and Profiles who should be able to perform the transition and click the “Save” button.

Assigning Screens to Transitions

When you click on the “Edit” button in “Prerequisites Screen” or “Transition Details Screen” columns you will see the following configuration screen:



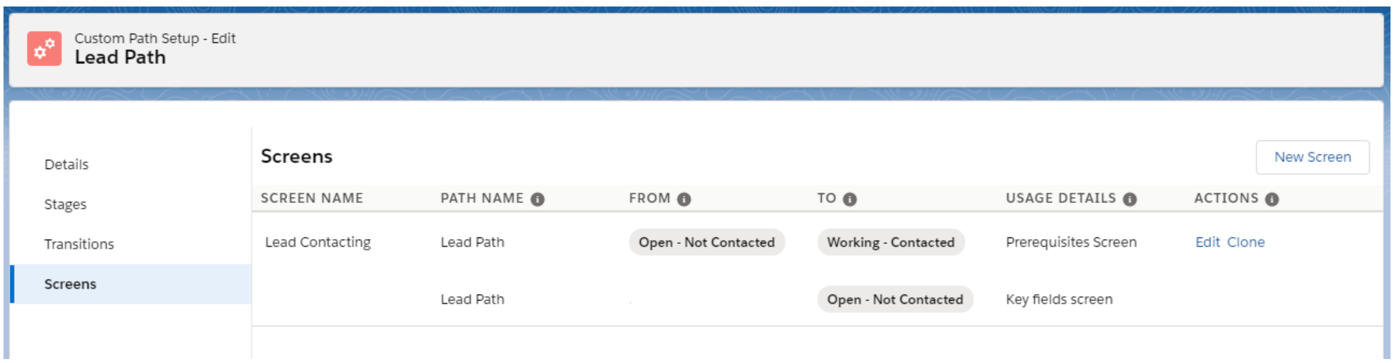
In the “Screen To Use” dropdown you can select one of the existing screens to reuse. If a screen is selected – you will see its preview below.

Also, you can create a new screen or edit the selected screen by clicking on the corresponding button on the right side of the screen. In this case you will see the “Edit Screen” which is described in detail below.

Configuring Screens

Instead of configuring sets of fields for each transition and stage individually, the Welkin's Customizable Path uses the approach of Screens. A Screen is a group of fields with their corresponding settings and a Guidance that could be shown on any stage or transition. You can reuse Screens to save time.

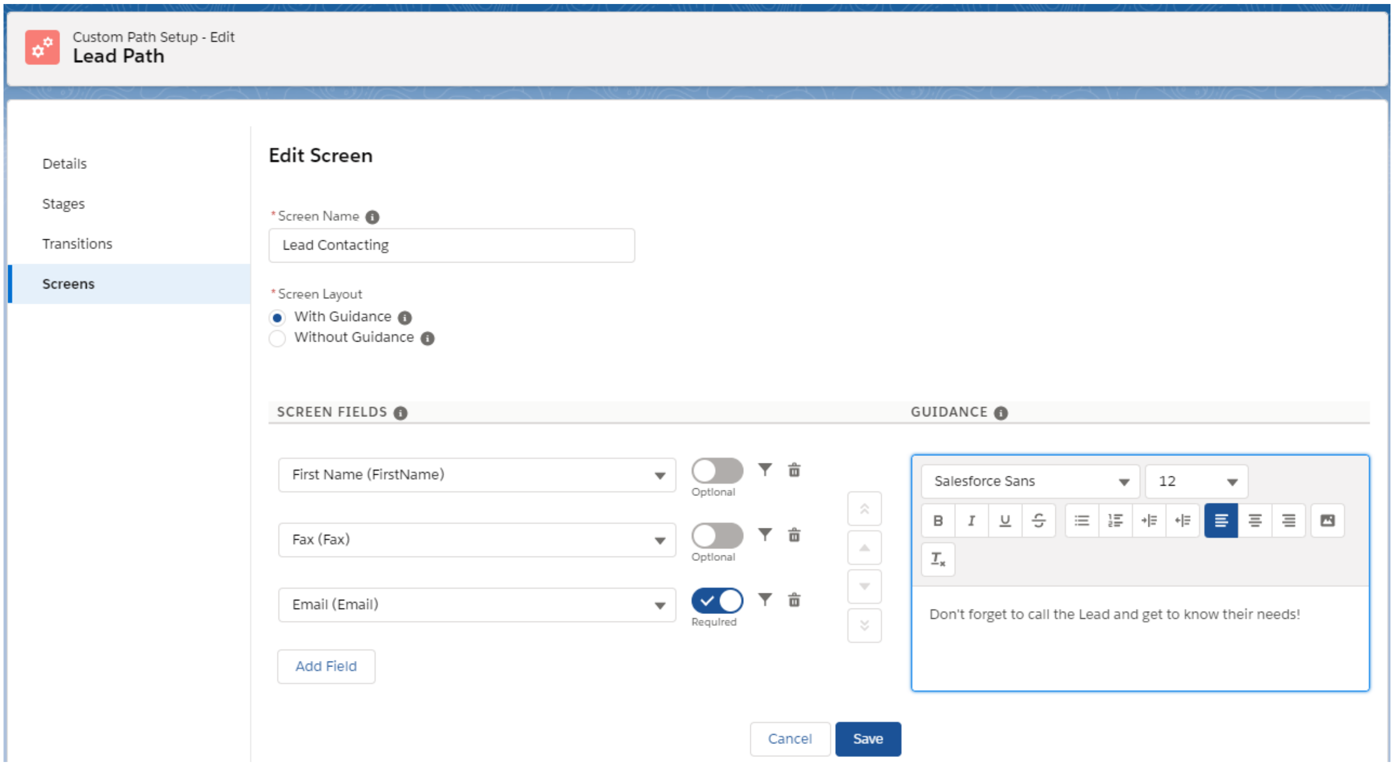
When you open any Custom Path configuration object navigate to the "Screens" tab on the left of the screen to configure Screens details. You will see the similar screen:



In this screen you see the list of all your screens and where they are used. You can also create a new Screen here.

Editing Screens

When you create or edit any Screen, you will see following configuration options:



You can configure the following parameters for a screen:

- Its name so it will be easier for you to reference it in the future
- Screen Layout – if a screen should include text guidance on the right side or no. Text guidance is like standard Salesforce's Path "Guidance for Success".
    - If a screen will not have text guidance, fields will be shown in two columns.
- Screen Fields and Guidance – this is the actual configuration of a screen.

Screen Fields Configuration

You can add as many fields to the screen as you need. Just click on the "Add Field" button and select a field from the picklist.

If a field is required on the object level – it will be also always required on a screen. However, if a field is optional on the object level – you can easily make it required on a certain screen using the switch to the right.

If you are building an advanced Custom Path, you can even configure conditions when to show a field on a screen. To configure these conditions, click on the "Filter" icon near the field.

You can also reorder fields on a screen – select a field row and use “Top”, “Up”, “Down”, “Bottom” buttons to control its position in the list.

Guidance

If a screen’s layout is “With Guidance” your users will see a text guidance on the right side of a screen. You can configure the text for each screen in the “Guidance” section using a standard Rich Text editor.

Using Custom Paths on Record Pages

Once you have a Custom Path configured – it is time to add it to your Record Pages so users can interact with it.

In our example we have created a Custom Path for the Lead object, so we will navigate to any Lead record, click on the "Setup" button at the top right corner and select "Edit Page". The standard Lightning App Builder will be shown.

In the Lignting App Builder in the Components list on the left search for the "CustomPath" component and add to it to a page instead of the standard Path or anywhere else. In the component parameters select the desired Custom Path from the picklist.

Note: It might make sense to hide the field that you use as the Status field from the Page Layout so users won't be able to bypass transitions permissions by simply changing the Status field.

Save and Activate the Record Page and that is it. Now your Lead Record Page will use Welkin's Customizable Path to guide users through the process!

Here is how the component will look like on your record page: