



FlexiPath Implementation Guide

Spring 2026



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Implementation Guide

Requirements for the FlexiPath Application

Review requirements and prepare your Salesforce org before you install FlexiPath.


General

To enable the FlexiPath, your org must meet these requirements.

- Lightning Experience is enabled in Salesforce.
- Lightning Web Security (LWS) is enabled in Setup → Session Settings.
 - LWS is enabled by default for all orgs created in Winter '23 and later.
 - Before enabling this setting in production, it is recommended to validate the change in a sandbox environment to identify potential impacts to custom components or third-party apps.

Users

To access the FlexiPath Setup Application, users must have a valid Salesforce license. In addition, the following system permissions are required to configure and manage FlexiPath metadata:

- Customize Application – Required to create, edit, and manage FlexiPath custom metadata, configuration records, and application settings.
 - View Setup and Configuration – Required to access Setup pages to manage and remove FlexiPath records.
- 

To access and use FlexiPath functionality, users must be assigned an active FlexiPath License.

- The FlexiPath license controls access to FlexiPath components, automation, and runtime behavior.

Give Users Access to FlexiPath

To grant users access, an admin must assign the required licenses and permissions.

1. Assign FlexiPath Licenses
 - a. Go to **Setup** → **Installed Packages**
 - b. Find **FlexiPath by Summit** and select **Manage Licenses**
 - c. Click “**Add Users**” to assign licenses or “**Remove Multiple Users**” to revoke licenses.
 - d. This page provides visibility into FlexiPath license information, including license status, expiration date, total licensed seats, and assigned licenses.

Package Details
FlexiPath By Summit
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Enable for Platform Integrations

Package Name	FlexiPath By Summit	Publisher	Summit - FlexiPath
Status	Active	Allowed Licenses	20
Expiration Date	12/31/2026	Used Licenses	0
Enabled for Platform Integrations		<input type="checkbox"/>	

A | B | C | D | E | F | G | H | I | J | K | L | M

Licensed Users

Add Users

Remove Multiple Users

Full Name ↑	Role	Active
No records to display.		

2. Assign Permission Sets

a. Go to **Setup** → **Permission Sets**

b. Assign the following as appropriate:

i. **FlexiPath Admin** – for users configuring paths and metadata

1. Admin users who do not have the System Administrator Profile will need the “Customize Application” and “View Setup” permissions

ii. **FlexiPath User** – for end users interacting with paths

<input type="checkbox"/>	Action	Permission Set Name ↑	API Name
<input type="checkbox"/>	Clone	FlexiPath Admin	FlexiPath_Admin
<input type="checkbox"/>	Clone	FlexiPath User	FlexiPath_User

Navigating the FlexiPath Setup Application

Access the FlexiPath App

To access the FlexiPath Setup Application:

1. Open the **App Launcher**
2. Search for **FlexiPath**
3. Select the **FlexiPath** app

Once inside the FlexiPath Setup Application, use the tabs to navigate between configuration, testing, and administrative areas:

- **FlexiPath Setup Home**
 - Central landing page with tables of FlexiPath configurations
 - Provides quick access to edit records and navigate to setup areas
- **FlexiPath Guided Setup**
 - Primary workspace for configuring paths and step behavior
 - Define picklist values, step order, guidance, and associated tasks
- **FlexiPath Task Template Setup**
 - Create reusable task templates for use across multiple paths
 - Standardize task definitions and reduce configuration duplication
- **FlexiPath Object Mapping Setup**
 - Define object conversions and field mappings
- **Path Examples**
 - Sample object used to test path features and functionality
- **Path Step Tasks**
 - Backend records that drive task display on path steps
 - Typically reviewed for troubleshooting rather than direct configuration



Configure a FlexiPath Path

FlexiPath paths are configured using the FlexiPath Guided Setup tab within the FlexiPath Setup Application. Guided Setup walks administrators through a structured, step-by-step process to define how users progress through stages, what guidance they see, and which features are enabled along the way.

Complete all the steps below to finish setting up FlexiPath

25% Complete

This path is not activated. Set active to true. If you are editing the path, it will remain disabled for users until it is activated and setup is complete.

Save Path Setup

✓

Configure Your Path, Functionality, and Pick an Object

2 mins

The object and picklist you choose determines the path for your users. This is the first step you need to complete.

✓

Path Name *

1

Opportunity Path

✓

Path Object *

1

Opportunity

To continue setup, choose an object that includes at least one picklist field. Paths rely on picklists to define their stage progression.

✓

Path Step Field *

1

Stage

✓

Path Step Probability Field

1

Probability (%)

✓

Run Path in System Mode

✓

System Mode

Enables the Path to run in System Mode, allowing it to update fields that might normally be restricted by user permissions — such as Closed, Won, Probability, or the Path Step field. Fields shown in the Path detail view will still respect Field-Level Security. This setting is disabled by default, and should only be enabled after carefully reviewing your organization's security and data governance policies.

●

Active Path

No

Determines whether this Path is active and available to users. Inactive Paths are hidden from record page selection lists.

1

Tip: Standard Probability fields may update automatically (e.g., on Opportunities with Stage). For independent tracking, use a custom field.

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Choose Your Path Steps

3-5 mins

Select which picklist values will define the stages of your path. You can also enable step-level features to guide users through each stage.

Configure Step Details

15-20 mins

Set up guidance and actions for each picklist value you've chosen as a path step. Customize details such as instructions, fields to highlight, and step-specific settings to provide users with clear direction and the right tools at each stage of the process.

Enable Additional Features for Your Path

2 mins

Turn on optional features to enhance the path experience. These settings let you control how path features behave across your organization, providing flexibility for user preferences or enforcing consistent behaviors to ensure a standardized experience.

1. Configure Your Path, Functionality, and Pick an Object

- a. This step establishes the foundation of your path configuration.
 - i. Select the Salesforce object and picklist field that will drive the path
 - ii. Define the core behavior and functionality for the path
 - iii. The selected object and picklist determine where and how the path is available to users

2. Choose Your Path Steps

- a. Use this section to define the stages users will move through.
 - i. Select which picklist values should be included as path steps
 - ii. Control the order in which steps appear
 - iii. Enable features that control how the path behaves
- b. Only the picklist values selected here will be available in the path experience.**
 - i. Picklist values are automatically filtered based on the record type.**
 - ii. Dependent picklists are not currently supported.**

3. Configure Step Details

- a. This section allows you to tailor the experience for each individual path step.
 - i. Configure guidance text and instructional content for each step
 - ii. Highlight important fields or actions relevant to the current stage
 - iii. Apply step-specific settings to support user decision-making and consistency

4. Enable Additional Features for Your Path

- a. Control how path behavior is enforced or made configurable for users




Configure Task Templates for Path Steps

Task Templates are configured using the FlexiPath Task Template Setup tab within the FlexiPath Admin Application. Task Templates define reusable sets of tasks that can be applied to path steps, ensuring consistency and reducing repetitive configuration.


Complete all the steps below to finish setting up your FlexiPath Task Template

25% Complete



This task template is not complete. Complete the setup to enable it. If you are editing the task template, it will remain disabled for users until it is complete.


Save Task Template Setup



Configure Your Task Template

2 mins


Set up the foundational settings for your Task Template. This defines how the template behaves and is used when tasks are assigned to path steps.



Task Template Name *

1

Opportunity - Qualification Tasks




Description

1

Defines the tasks the Sales Rep must complete before an Opportunity can move from Qualification.


159 characters remaining




Default Due Date Offset *

1

7




Active Task Template



Yes

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Configure Your Task Template Items

10-15 mins

Define and organize the individual tasks within your Task Template. This determines how each task appears, behaves, and is ordered when displayed on a path step.



1. Configure Your Task Template

- a. This section defines the overall behavior and usage of the Task Template.

2. Configure Your Task Template Items

- a. Use this section to define the individual tasks that make up the template.
 - i. Create and organize the tasks included in the template
 - ii. Control task order, display behavior, and task-level settings

Usage in Guided Setup

Task Templates are applied to path steps through the **FlexiPath Guided Setup** tab.

- Task Templates are selected and assigned at the **path step level**
- A single Task Template can be reused across multiple paths and steps
- When a step is activated, tasks defined in the assigned template are displayed and managed automatically

This approach allows administrators to standardize task behavior while maintaining flexibility across different path configurations.

✓ Enable Tasks	<input checked="" type="checkbox"/>	Enables Path Step Tasks for this stage. When turned on, users will see and manage associated tasks defined in the task template for this step. Use this to guide users through required actions or checklists as they progress along the Path.
✓ Task Columns *	<input type="text" value="2"/>	
✓ Task Template*	<input type="text" value="Opportunity - Qualification Tasks"/>	

Configure Object Mappings

Object Mappings are configured using the FlexiPath Object Mapping Setup tab within the FlexiPath Setup Application. Object Mappings define how records transition between objects as part of a path-driven process, ensuring data is transferred consistently and predictably.

Complete all the steps below to finish setting up your FlexiPath Object Mapping

35% Complete

⚠️ This object mapping is not complete. Complete the setup to enable it. If you are editing the object mapping, it will remain disabled for users until it is complete.

Save Object Mapping Setup

✓ **Configure Object Mapping** 3-5 mins

Set up the core mapping details by selecting your source and target objects. This defines the foundation for how records will be processed between the two objects.

✓ Object Mapping Name *

1

Opportunity to Project Conversion

✓ Description

1

Once the Opportunity enters the Closed Won path step, create a Project record.

177 characters remaining

✓ Source Object Name *

1

Opportunity

✓ Target Object Name *

1

Project

✓ Active Object Mapping

✓

Yes

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○ **Configure Field Mappings** 5-10 mins

Define how fields in the source object map to fields in the target object. This ensures data is transferred correctly during the mapping process.

1. Configure Object Mapping

- a. This section defines the foundation of the object mapping.
 - i. Select the source object and target object
 - ii. Define the overall behavior of the mapping configuration

2. Configure Field Mappings

- a. Use this section to define how data is transferred between objects.
 - i. Map fields from the source object to corresponding fields on the target object
 - ii. Control how values are populated during the mapping process

Usage in Guided Setup

Object Mappings are applied within the **FlexiPath Guided Setup** tab at the path level.

- Object Mappings are selected and associated with paths
- Mappings are executed when users reach or complete a configured “Won” step
- A single object mapping can be reused across multiple paths and paths can use multiple mappings

This allows administrators to standardize record conversion and data transfer behavior while maintaining flexibility across different path configurations.

The screenshot displays a configuration interface for Object Mappings. It features three main settings, each with a status indicator (a green checkmark in a circle) and a toggle switch:

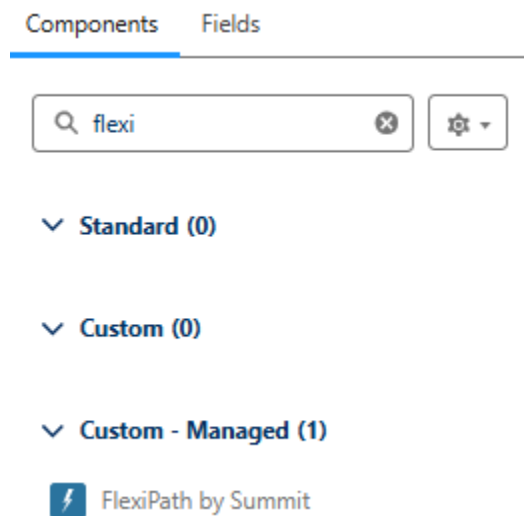
- Enable Convert Object Mappings:** The toggle is turned on, labeled "Enabled". A descriptive text states: "Enables record conversion for this Path using preconfigured Object Mappings. When enabled, users can select from existing mappings to determine how the record will be converted and related fields populated."
- Converted Field *:** A dropdown menu is set to "Is Converted".
- Run Path Conversion in System Mode:** The toggle is turned on, labeled "System Mode". A descriptive text states: "Enables the Path Conversion process to run in System Mode, granting read access to all source object fields and update access to all target object fields defined in the field mappings. This allows conversions to complete successfully even when end users lack permission to read or update mapped fields. This setting is disabled by default, and should only be enabled after carefully reviewing your organization's security and data governance policies."

At the bottom, there is a blue informational message box with a question mark icon: "Looks like there's nothing here yet. Use the new object mapping button to get started. Setup at least one record to finish this step." To the right of this message is a blue button labeled "New Object Mapping".

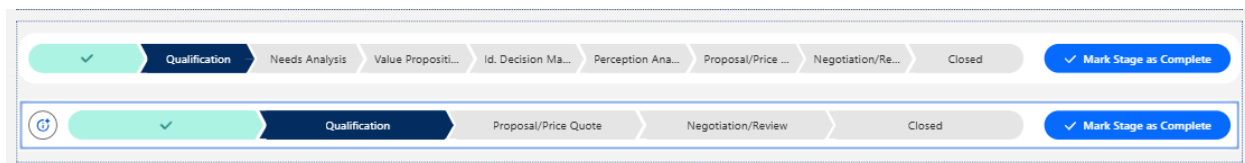
Add FlexiPath to a Lightning Record Page

FlexiPath is surfaced to end users by adding the FlexiPath Lightning component to a Lightning Record Page using the Lightning App Builder. This step makes the configured path visible and interactive on the selected object.

1. Open the Lightning App Builder
 - a. Navigate to the record page
 - b. Select the Setup gear in the top right corner of the UI
 - c. Click "Edit Page"
2. Add the FlexiPath Component
 - a. From the Custom components section, drag the FlexiPath component onto the page



- b. Place the component in a prominent location, typically near the top of the record page



c. Choose your Path Configuration

i. **Only completed and activated Paths will appear in the drop-down**

Page > FlexiPath by Summit

*Choose your Path Configuration ⓘ

Opportunity Path 🔍

▼ Set Component Visibility

Filters

+ Add Filter

3. Assign and Activate the Page

- Assign the page to the appropriate apps, record types, and profiles as needed
- Activate the Lightning Record Page to make FlexiPath available to users