Summit

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.

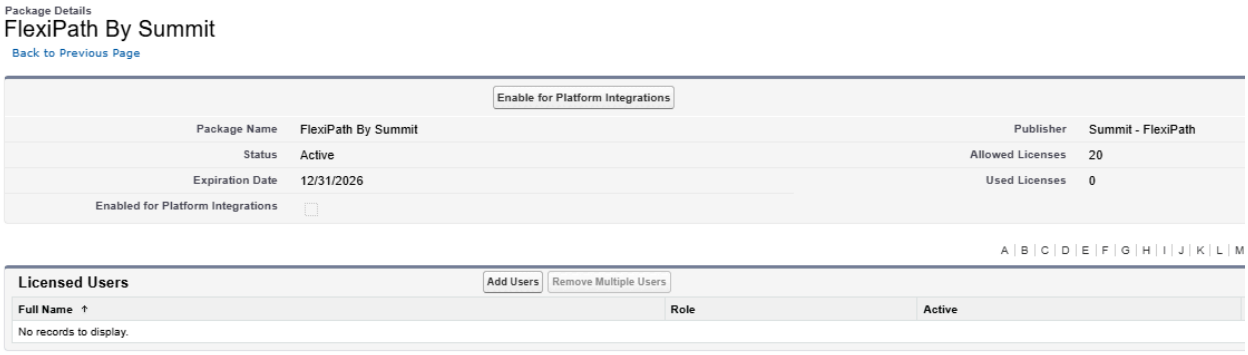
To access and use FlexiPath functionality, users must be assigned an active FlexiPath License.

- 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.



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

Action	Permission Set Name ↑	API Name
Clone	FlexiPath Admin	FlexiPath_Admin
Clone	FlexiPath User	FlexiPath_User

Access the FlexiPath App

To access the FlexiPath Setup Application:

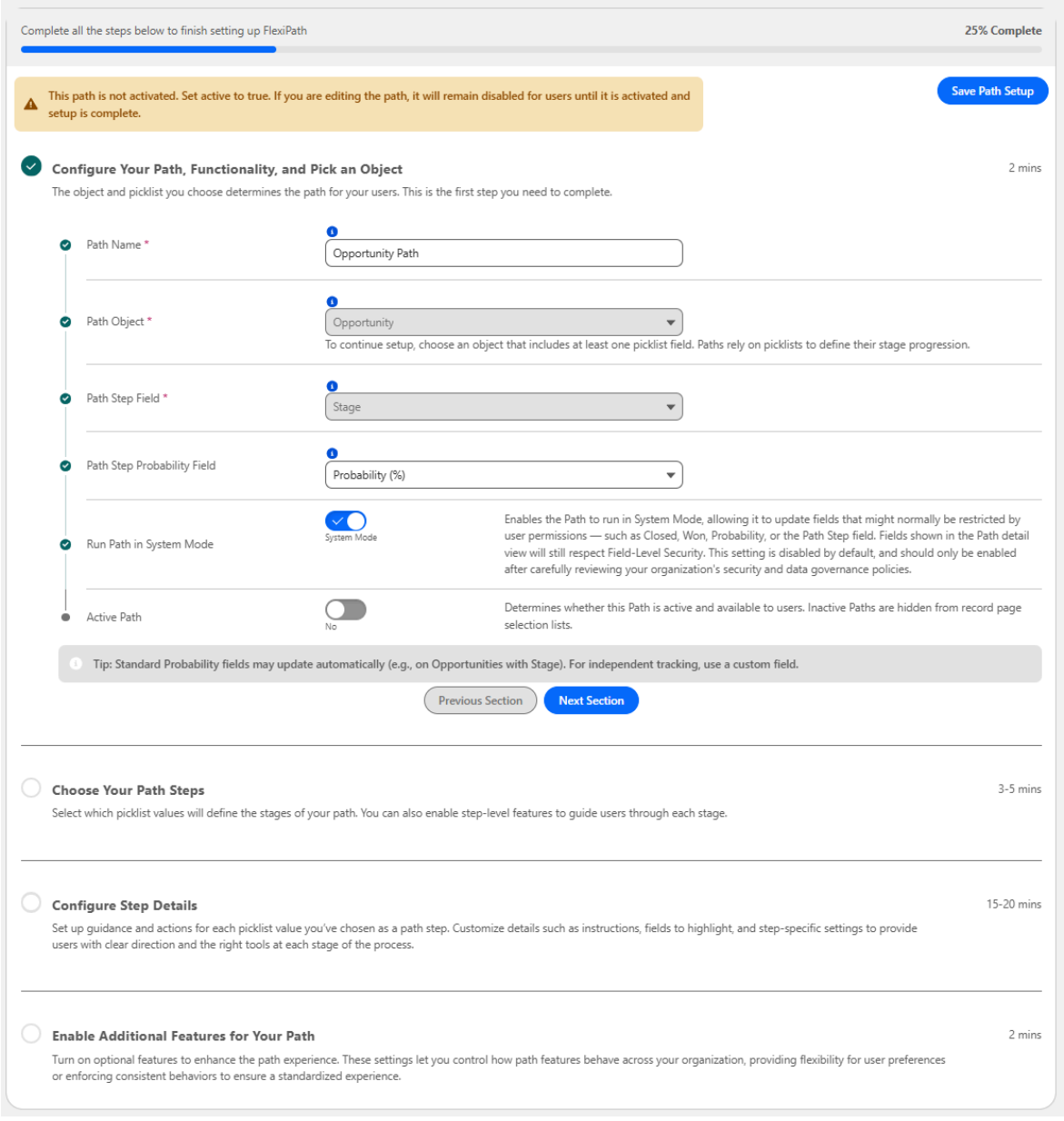
1. Open the **App Launcher**
2. Search for **FlexiPath**
3. Select the **FlexiPath** app

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

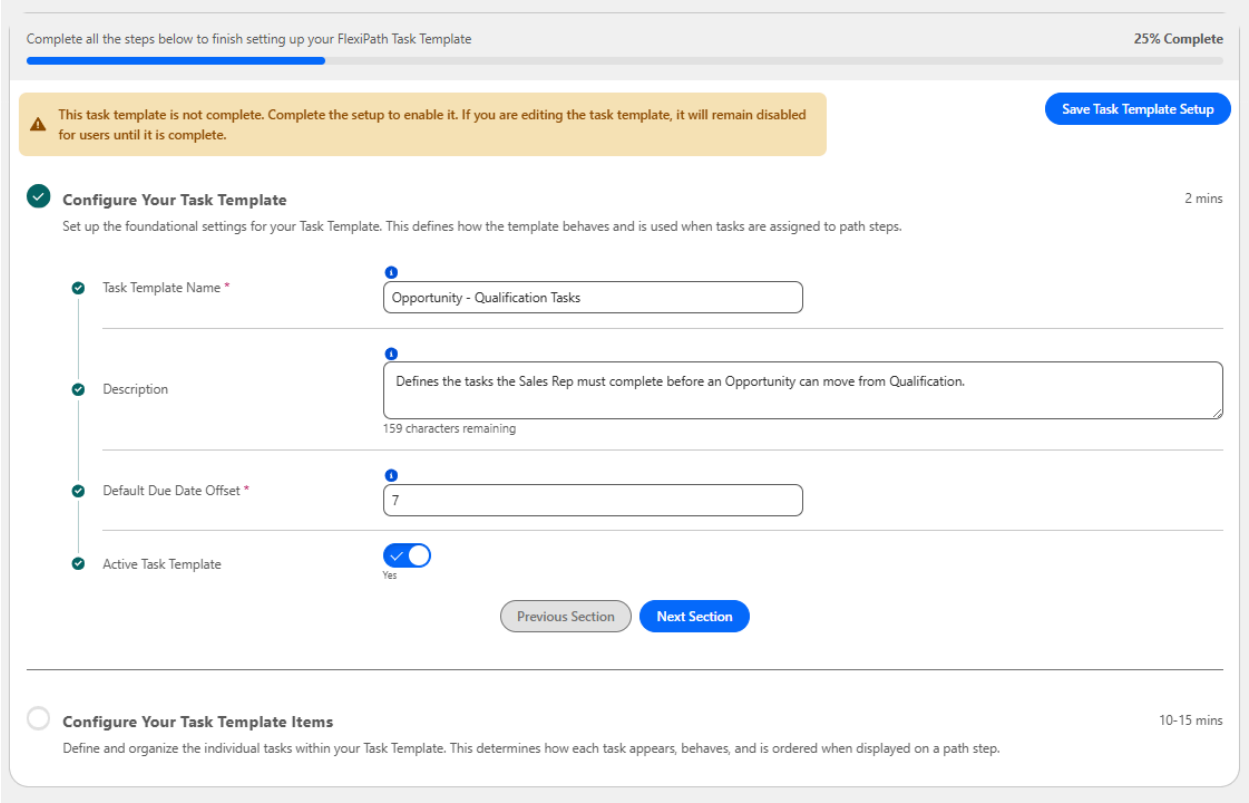
FlexiPath paths are configured using the FlexiPath Guided Setup tab within the FlexiPath Setup Application. Guided Setup walks administrators through a structured, step-by-step process to define how users progress through stages, what guidance they see, and which features are enabled along the way.



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.



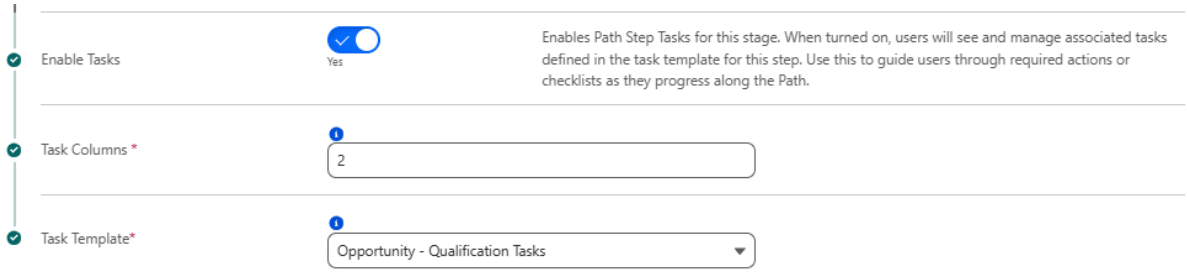
1. **Configure Your Task Template**
    a. This section defines the overall behavior and usage of the Task Template.
2. **Configure Your Task Template Items**
    a. Use this section to define the individual tasks that make up the template.
        i. Create and organize the tasks included in the template
        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.

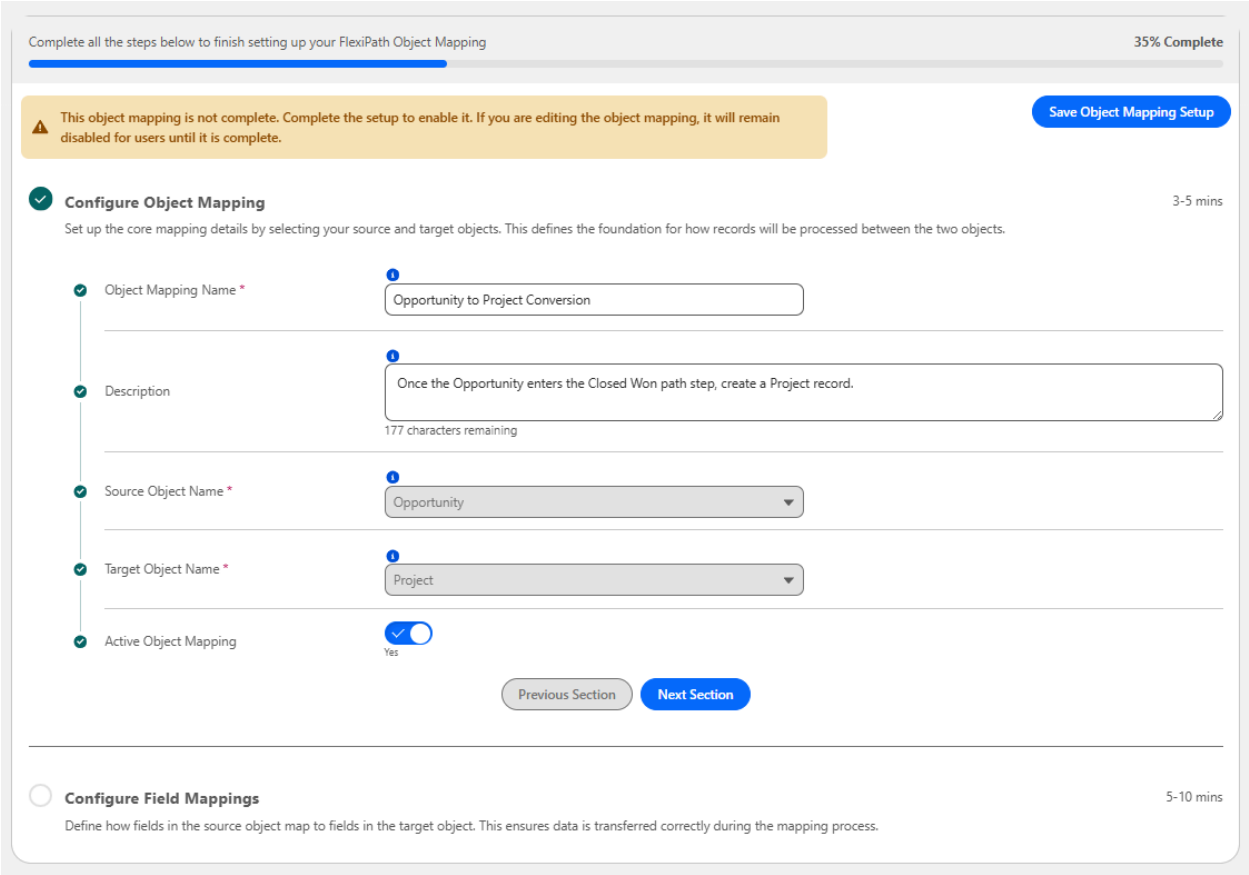
- Task Templates are selected and assigned at the **path step level**
- A single Task Template can be reused across multiple paths and steps
- When a step is activated, tasks defined in the assigned template are displayed and managed automatically

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



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.



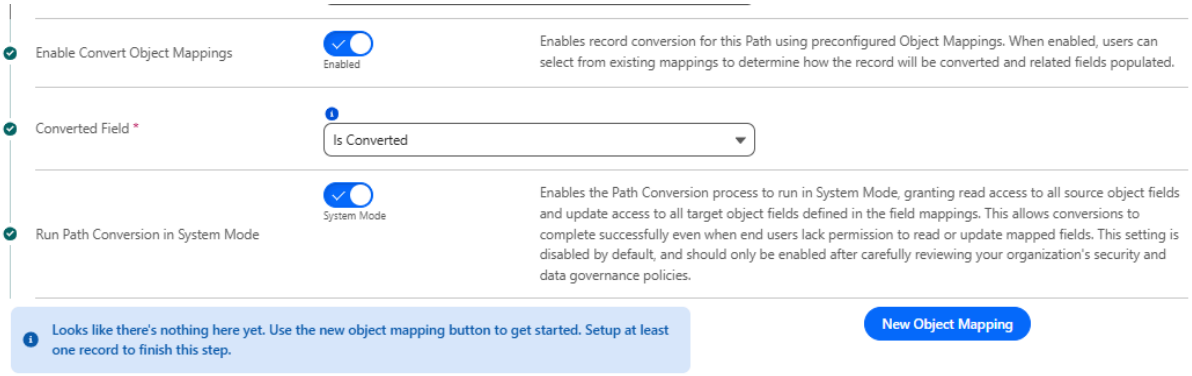
1. **Configure Object Mapping**
    a. This section defines the foundation of the object mapping.
        i. Select the source object and target object
        ii. Define the overall behavior of the mapping configuration
2. **Configure Field Mappings**
    a. Use this section to define how data is transferred 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

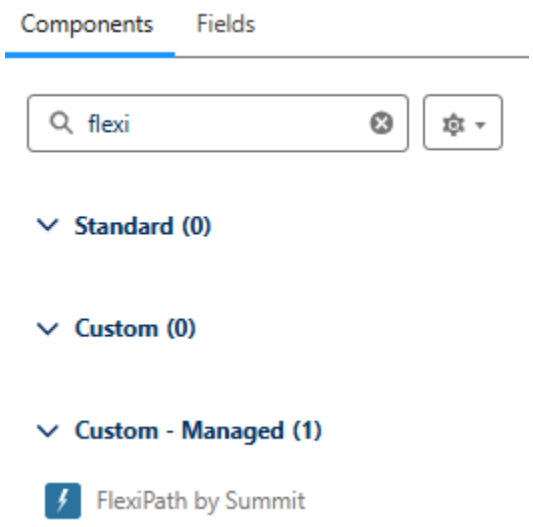
This allows administrators to standardize record conversion and data transfer behavior while maintaining flexibility across different path configurations.



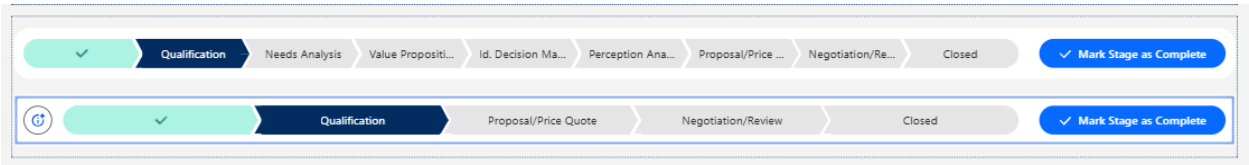
Add FlexiPath to a Lightning Record Page

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

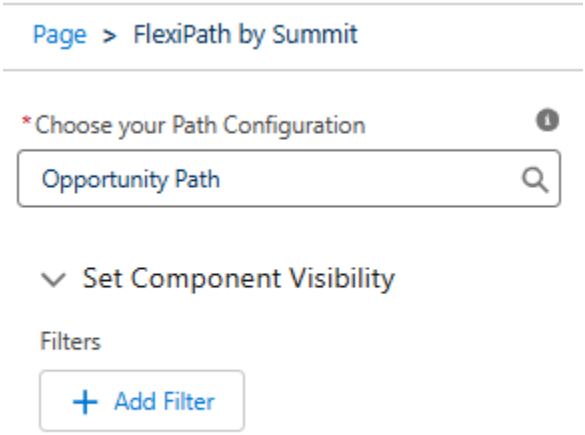


    b. Place the component in a prominent location, typically near the top of the record page



c. Choose your Path Configuration

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



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