Salesforce URLs

Note: This article only applies to Salesforce Classic URLs. For information on Salesforce Lightning URLs, please visit this article.

Rules in Salesforce are commonly based upon the URL Rule Type or Variables in order to create Rules within Walk-Thrus, Segmentations, or Goals. Using targeted URLs and User Variables enables you to customize where and to whom your WalkMe content appears based on tab, page, form status, or user role.

The Short Version

URLs in Salesforce are used in Segmentation and within certain conditions of the Walk-Thru. URLs are a better alternative to On Screen Element because they require less time to process the Rule, but are just as effective as using an On Screen Element at identifying specific Tabs (i.e. Opportunities), Pages (Main Page, Views, or Records), or Form Status (New Record, Edit Record, Form Error). By using specific URL combinations you can configure your Jump to Steps to start from the middle of different types of pages, or to error proof when an error appears on-screen.
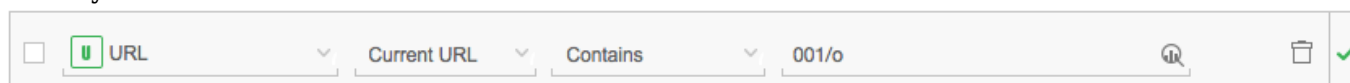
How It Works

The first component of a Salesforce URL after the domain is the Tab URL. The first three digits represent the different tabs Salesforce has by default. Custom Objects may not have a consistent Tab URL. Each Page type can be further broken down by Main Page (list of recent records) or an individual Record. Within a Record, the URL can specify whether the form is actively being edited (Edit or New Record), or whether there is an error on the form.

Walk-Thrus

Within Walk-Thrus it is common to use URLs in Jump to Steps: URLs can be used to start a Walk-Thru from the middle as well as error proofing. To start a Walk-Thru from the middle, use the Tab URL in combination with a page identifier:

The Rule above will trigger a Jump to Step to skip ahead if the user is on the Accounts main page. To identify if an error is on screen combine a Tab URL with the error identifier:

This rule will trigger a Jump to Step to return to a previous step is an error occurs while creating a new record.

| ☐ | **U** URL | ⌄ | Current URL | ⌄ | Contains | ⌄ | 001/e | 🔍 | 🗑 | ✓ |

Launchers

Launchers often require URL Segmentation. Segmenting a Launcher based on location is important so that they do not impact performance by trying to play on every page in Salesforce. When Segmenting a Launcher by URL, make sure you are being specific about the Tab and Page on which the Launcher is located. The Rule below will limit the appearance of a Launcher to a New Account record only:

| ☐ | **U** URL | ⌄ | Current URL | ⌄ | Contains | ⌄ | /001/e? | 🔍 | 🗑 | ✓ |

Goals

URLs are used in combination with click events to check if a process has been completed. Many elements within Salesforce are very similar, such as the Save button. Adding a Salesforce URL as part of the Rule within a goal enables you to target a Save button on a specific page and accurately measure if the process has been completed correctly.

| ☐ | **U** URL | ⌄ | Current URL | ⌄ | Contains | ⌄ | /001/e? | 🔍 | 🗑 | ✓ |

and or

| ☐ | **SE** On Screen Element | ⌄ | 🔍 ⚙ 👁 | Clicked | ⌄ | | 🗑 | ? |

You may also like to measure how many times users see an error message. You can create a goal that will keep track of how frequently an error appears:

| ☐ | **U** URL | ⌄ | Current URL | ⌄ | Contains | ⌄ | 001/e | 🔍 | 🗑 | ✓ |

Segmentation

URLs are commonly used in Segmentation in order to limit where a certain item will appear: If a Launcher is specific to the Opportunities Tab, a Segment should be created so that the Launcher appears only on the right Tab and page. The Launcher above will only appear on a new opportunities record:

| ☐ | **U** URL | ⌄ | Current URL | ⌄ | Contains | ⌄ | /006/e? | 🔍 | 🗑 | ✓ |

Frequently Used URLs

Tab	URL
Accounts	001
Contacts	003
Leads	00Q
Cases	500
Reports	00O
Opportunities	006

Page	URL
Main	001/o 001/fcf=
New Record	/e?
Error for New Record	/e
Edit Record	/*e?
Edit for Existing Record	*/001