

Salesforce Variables

Brief Overview

Within WalkMe for Salesforce, you can use Salesforce Variables to segment the WalkMe assets you build to ensure that only content relevant to that user type is visible. Variables can also be used to create analytics reports about individual users based on their email or username to show their usage of WalkMe.

Enabled Feature

To request access to Salesforce Variables, please reach out to your Customer Success Manager or WalkMe contact. **It is necessary to install it separately on each instance**, including sandboxes and production environments.

Note

Uploading the Salesforce package is a mandatory process for all Salesforce Lightning implementations, including OOTB (out of the box) variables. The **Salesforce package is not supported on Lightning Communities**. Please refer to the following article: [How to Install the Salesforce Package](#)

The Short Version

A variable is a value that can change depending on conditions or on information passed to the program through the browser. Salesforce provides a number of default variables that can be read and used by WalkMe for segmentation and in Insights. If there are variables you would like to use that are not enabled by default, speak to your Salesforce admin about adding them.

You can use variables to create segments that target specific users and present them with only relevant items. For example, if some ShoutOuts only apply to users in certain job roles, you can segment it by the role variable. For processes that are only relevant for users in North America, use the region variable.

Variables can also be used in user tracking to identify users. Use a variable that tracks email, ID, or even name to get a more accurate user count in your reports and put individual user actions in context. For example, pull reports on individuals who have completed their Onboarding tasks or not.

How It Works

To identify a Salesforce Variable, WalkMe will look into the HTML on the end user's Salesforce instance and pull the value. Salesforce Variables are checked against the value defined in the Segmentation Rule or user tracking settings. Salesforce Variables vary by user. Each variable value is represented as an 18 digit code and will change based on the person currently using the environment.

Salesforce has a number of default variables available within their system. To use the default variables within Salesforce, the variable name must start with "**walkme_sf_vars.**" Add the variable name after the period to use the variable within the Rule Engine.

For example: walkme_sf_vars.**profileID**

These WalkMe can read and segment by using the 18 digit version of the variable value. In some cases, Salesforce will supply a 15 digit version. You can learn how to convert variable values from 15 digits to 18 digits in our Salesforce course, linked at the bottom of this article.

Track Individual Users: Unique User Settings

Configure Unique User Settings to identify how you would like to identify users in WalkMe Analytics. By tracking an individual user you can associate engagement data with unique IDs. Tracking unique users, you will get a more accurate user count in your reports and put individual user actions in context. Unique User Settings are found in WalkMe Settings in the General tab. There are a few ways to track individual users. Only one option can be chosen at a time.

Tip

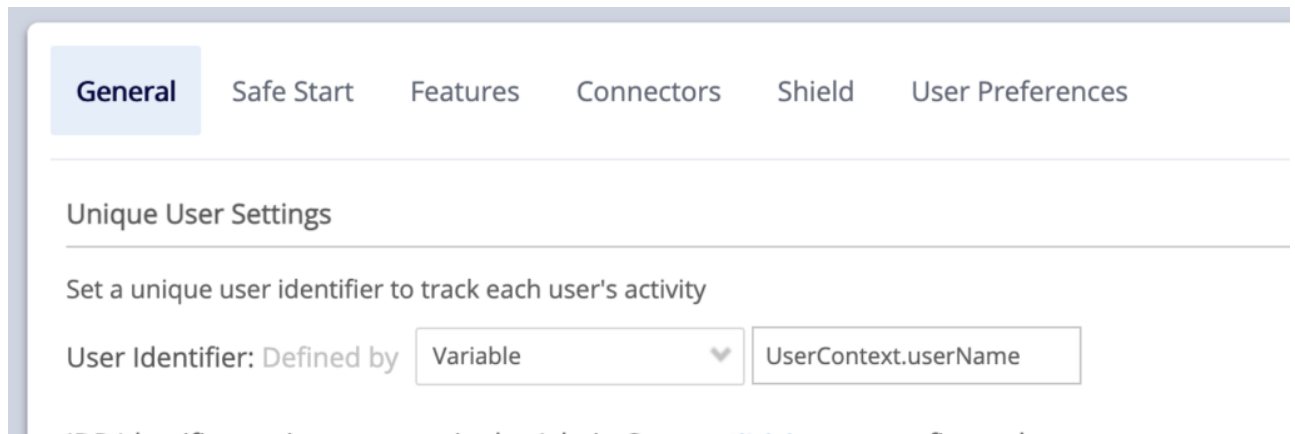
We recommend tracking by username, which is typically the user's email.

- walkme_sf_vars.**userName**

Methods For Tracking Users

Use User Name (recommended)

- Use the Variable Identifier and input the WalkMe Salesforce username variable
- UserContext.userName



By Email or other variable

- If the user name is not the same as the user's email, you will first need to add it to your Salesforce instance as it is not one of the seven predefined Salesforce Variables
- After adding it in Salesforce Variable, you can use it as the variable by which to track unique users

Track Different User Types: Global Segmentation

Use variables in the rules in the Segmentation Center to target specific audiences. For example, if you have different Smart Walk-Thrus for admins and managers, create segments for each role type and define the segment by variable `walkme_sf_vars.roleId` is manager or admin. There are seven default sfvars available in WalkMe. Use the default seven in your segmentation rules without having to add them to your general settings.

[Learn more about Segmentation.](#)

Default Variables Available in Salesforce

Once sfVars is enabled for you by your Account Manager, the following variables can be used for segmentation:

- `walkme_sf_vars.organizationId`
- `walkme_sf_vars.organizationName`
- `walkme_sf_vars.profileId`
- `walkme_sf_vars.roleId`
- `walkme_sf_vars.userId`
- `walkme_sf_vars.userLanguage`
- `walkme_sf_vars.userName`

Note

The following variables are not available for use in Salesforce Lightning:

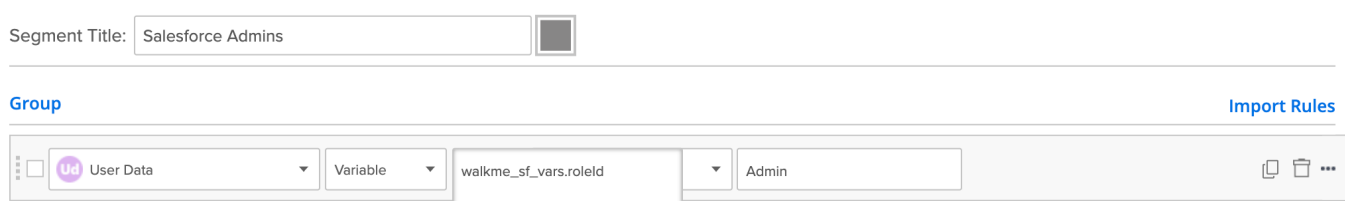
- walkme_sf_vars.organizationId
- walkme_sf_vars.organizationName

Finding the Current Variable Value

1. Open the Salesforce account of an individual with the value you are looking for (for example, someone on the sales team)
2. Enter full preview mode in the Editor
3. Open the console by right clicking on the screen and selecting “Inspect”
4. Type “walkme_sf_vars” into the console
5. Press enter to see default variables in Salesforce
6. If looking for the profile variable, search walkme_sf_vars.profileId and you will see the value for that account (for example, sales)
7. If Salesforce returns a 15 digit variable, use a 15 to 18 converter such as [this one](#)

Using a Default Variable for Segmentation

1. Create a new segment
2. Select type **User Data** → **Variable**
3. Type in the prefix “walkme_sf_vars.” and [the default variable of your choice](#)
4. Choose an operator such as “Is” or “Is Not”
5. Enter the Variable Value



The screenshot shows the 'Segment Title' field with the value 'Salesforce Admins'. Below it, the 'Group' section is active, showing a rule configuration. The rule is set to 'User Data' (indicated by a purple 'Ud' icon) and 'Variable'. The variable selected is 'walkme_sf_vars.roleId' and the operator is 'Admin'. There are icons for copy, delete, and more options on the right side of the rule configuration.

[Learn more about Segmentation.](#)

Adding Additional Salesforce Variables

Salesforce exposes only the seven by default and will not look for any extra ones (for example, company or geography) in the HTML unless told and added within the General Settings. If you would like to track a variable that is not one of the default, you will need to have your admin add it to your site and add the variable name it in the Salesforce Variables field located in the General Tab in Settings.

To use variables in a rule, use the prefix “walkme_sf_vars.”

In the example below, a customer added an email variable to their environment and is using it for Unique User Tracking.

Unique User Settings

Set a unique user identifier to track each user's activity

User Identifier: Defined by Variable walkme_sf_vars.Email

Note

Adding a variable is entirely separate from Unique User Tracking and will not affect it.

How to Add Additional Salesforce Variables

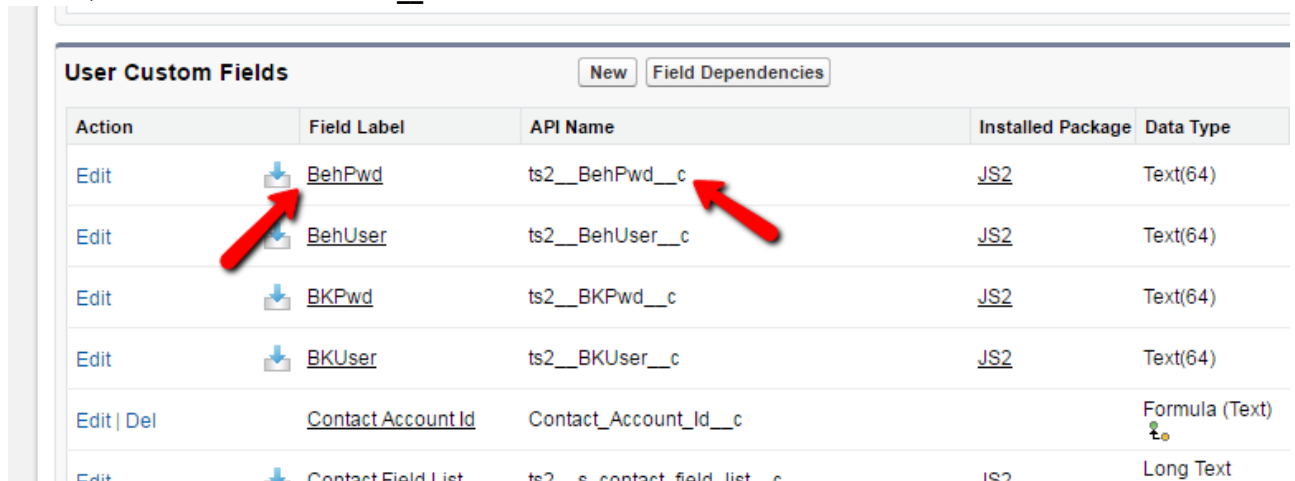
The variables in Salesforce's setup page are referred to as **Fields**, and can be found in their Salesforce site's Setup page by going here:

Setup > Objects and Fields > Object Manager > User > Fields & Relationships

There are two types of these fields:

User Custom Fields

1. If you want to add a variable under the **User Custom Fields** section, you will need its **API name**, which should end in "**__c**"



Action	Field Label	API Name	Installed Package	Data Type
Edit	BehPwD	ts2__BehPwD__c	JS2	Text(64)
Edit	BehUser	ts2__BehUser__c	JS2	Text(64)
Edit	BKPwD	ts2__BKPwD__c	JS2	Text(64)
Edit	BKUser	ts2__BKUser__c	JS2	Text(64)
Edit Del	Contact Account Id	Contact_Account_Id__c		Formula (Text)
Edit	Contact Field List	ts2__s__contact field list__c	JS2	Long Text

- In the example image, to add the **BehPwD** variable, you would need to type **ts2__BehPwD__c** into the Salesforce Variable field
- After adding the API name to the Salesforce Variable field, the custom variable will need to be written as **walkme_sf_vars.ts2__BehPwD__c** when configuring it as a variable rule in

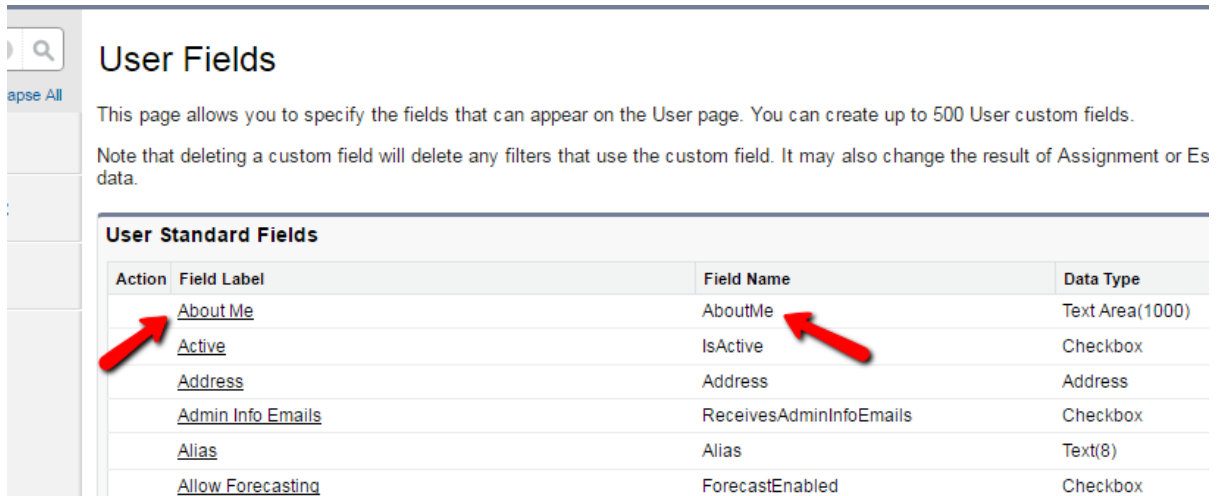
the Rule Engine (note the case sensitivity)

- **This applies to all Salesforce user variables**

User Standard Fields

1. If you want to add a variable under the **User Standard Fields** section, we will need its **Field Name**

- In this image, to add the About Me variable, you would need to type AboutMe into the Salesforce Variable field



Action	Field Label	Field Name	Data Type
	About Me	AboutMe	Text Area(1000)
	Active	IsActive	Checkbox
	Address	Address	Address
	Admin Info Emails	ReceivesAdminInfoEmails	Checkbox
	Alias	Alias	Text(8)
	Allow Forecasting	ForecastEnabled	Checkbox

Note

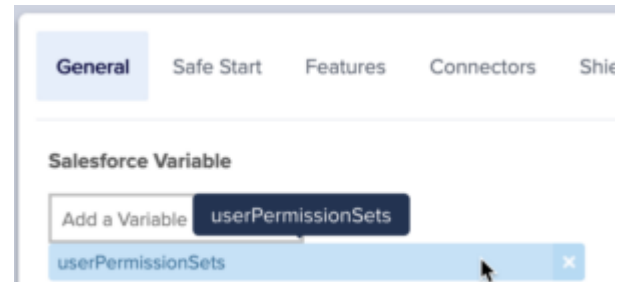
“Lookup” type fields are not currently supported.

Salesforce User Permission Sets Segmentation

To do this, simply add a custom variable called “userPermissionSets”.

1. In the WalkMe Editor, go to **System settings**
2. In the **General** tab, look for **Salesforce Variable**

3. Add a new variable called **userPermissionSets**
4. Click **Add** and then **Save**
5. Click **Publish settings**
6. You will now be able to access a variable called **window.walkme_sf_vars.userPermissionSets**



Note

For support you must have the latest installation package for your environment.

[How to Install the Salesforce Package](#)

Salesforce Groups Segmentation

In large organizations segmentation by **Role ID** or **Profile ID** is almost impossible due to the large number of different combinations of them, to have make use of this more usable WalkMe can now use a feature in Salesforce called “Public Groups”.

Salesforce Administrators and delegated administrators can create public groups, to segment: Groups are sets of users. Groups can contain individual users, other groups, the users in a particular role.

To do this, simply add a Custom Variable called “userGroups”.

This data will then appear on window.walkme_sf_vars.userGroups, as well as window.walkme_SF_Groups for backwards compatibility with the legacy SF Groups plugin.

Example of output:



Related Resources

- Watch [Deep Dive Video on Segmentation](#) or read [Segmentation Article](#)
- Read about the [Rule Engine](#), or check out the [Cheat Sheet](#)
- Learn more about [Rules in Salesforce Variables with this Cheat Sheet](#)
- Learn more about [Variables with this Cheat Sheet](#)
- Learn more about [How to Install the Salesforce Package](#)