

# Best Practices for Creating Smart Walk-Thrus

You know [how to build a Smart Walk-Thru](#), but want to know the tricks that the pros use? Keep reading to learn about strategies and methods we have found to be most effective at building easy-to-manage Smart Walk-Thrus.

## **Build Smart Walk-Thrus to be Easy to Manage**

When building your Smart Walk-Thru, keep in mind that the Smart Walk-Thru might be around for a while. Making sure Smart Walk-Thrus are easy to manage in the WalkMe Editor will ensure that you can continue to provide a smooth user experience. Make sure it is easy to manage and update for new builders or if you return to edit the guidance sometime later.

## **Avoid Adding Unnecessary Features**

While adding lots of features may allow you to accommodate all kinds of edge cases for users, we recommend building your guidance with 95% of users in mind. While it may be technically feasible to add all kinds of Error Handling Groups, Splits, and Wait For Flow Steps to ensure that a user completes a process exactly as you would like, it is not necessarily advisable. The more features, the more difficult it will be to pass management to another builder, to troubleshoot when something goes wrong, or to update as processes change.

## **Name Every Flow Step**

Make sure that you add a title that describes exactly what each Flow Step does. This will make it clear what the function of each step is, instead of having to infer this information from its associated Rule and location in the flow. [Read about Flow Steps.](#)

## **Use Notes**

If there are processes that are not immediately clear, use Notes to explain what's going on. Notes can be added to any Step or Flow Step. [Read about Notes.](#)

## **Connect to Other Smart Walk-Thrus**

Sometimes processes vary depending on the type of user or it may change based on some action the user takes. Use a Connect to Smart Walk-Thru to break up larger processes into smaller tasks. Using this Flow Step you can reduce building time by reusing steps common to multiple Smart Walk-Thrus, and ensure a smooth user experience. [Read about Connect to Smart Walk-Thrus.](#)

## Turn On Screenshots

When screenshots are enabled, WalkMe takes a screenshot whenever an Element is selected. In a screenshot, you will be able to see the URL that the item was created on, the Element, and the original configuration of the balloon. Screenshots make editing Walk-Thrus and troubleshooting much easier. You can also download screenshots to share with other team members. [Read about Screenshots.](#)

## Write Clear Goal Names

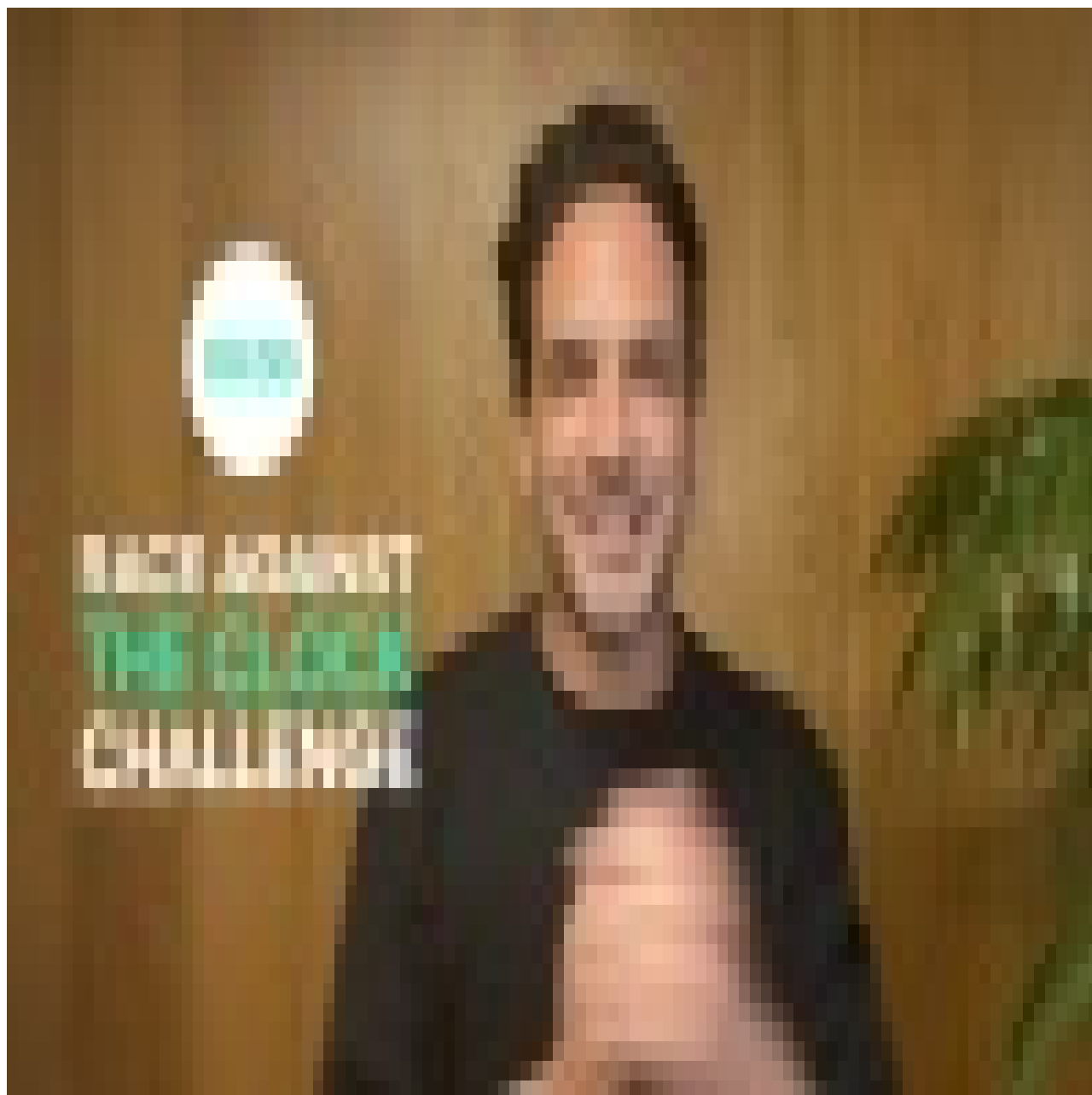
When you add Goals to Smart Walk-Thrus, be sure to give them very clear and descriptive titles. These titles will show up in Insights and can also be used as Rule types in the Rule Engine. For example, if you give the Goal a name like "Success" for the process of requesting time off, you and your teammates may have difficulty recalling what it is referring to. Instead, use a name that describes the rule such as "User reaches leave request sent page."

## Every Site is Unique

Every site is unique and our recommendations for building effective solutions may vary. It is important to understand the application you are building on before getting started!

## Smart Walk-Thru Videos

### Smart Walk-Thru Challenge





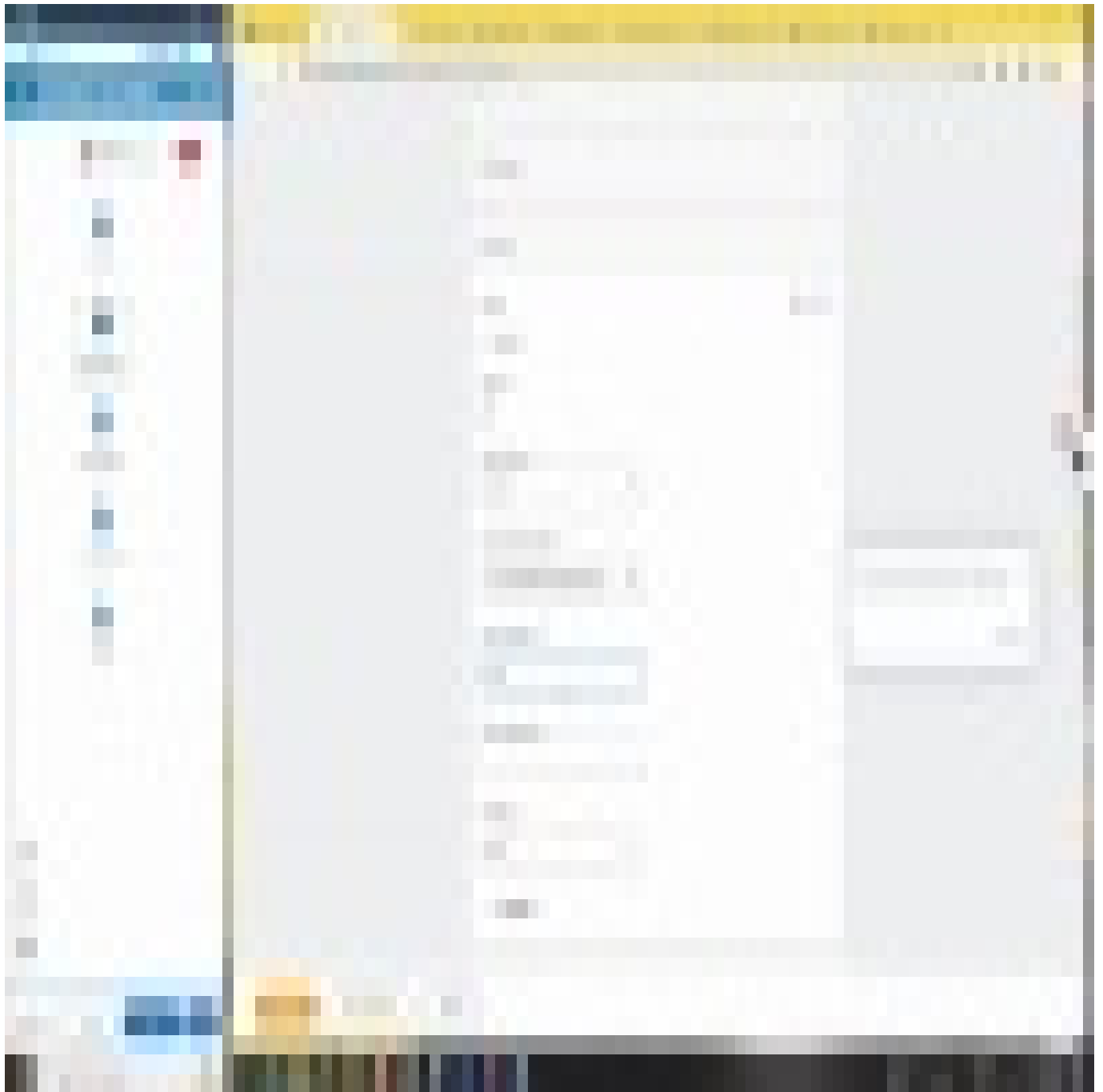
## Resetting to a Specific Step using WM Data

Find this video helpful? [Join the conversation on the WalkMe Community!](#)



## When to Use (Or Avoid) Next Triggers

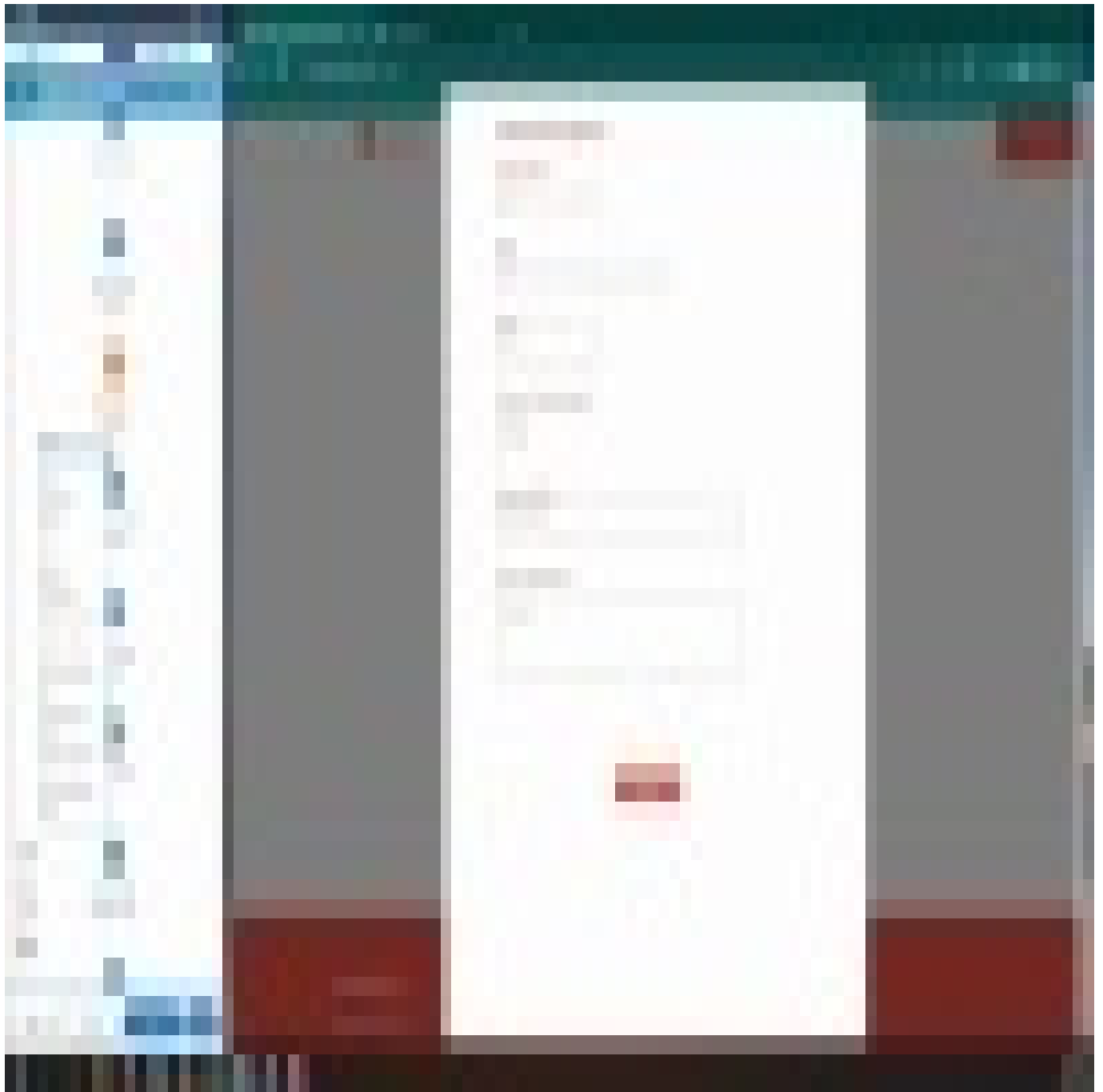
What are your next trigger best practices? [Let us know on the WalkMe Community!](#)



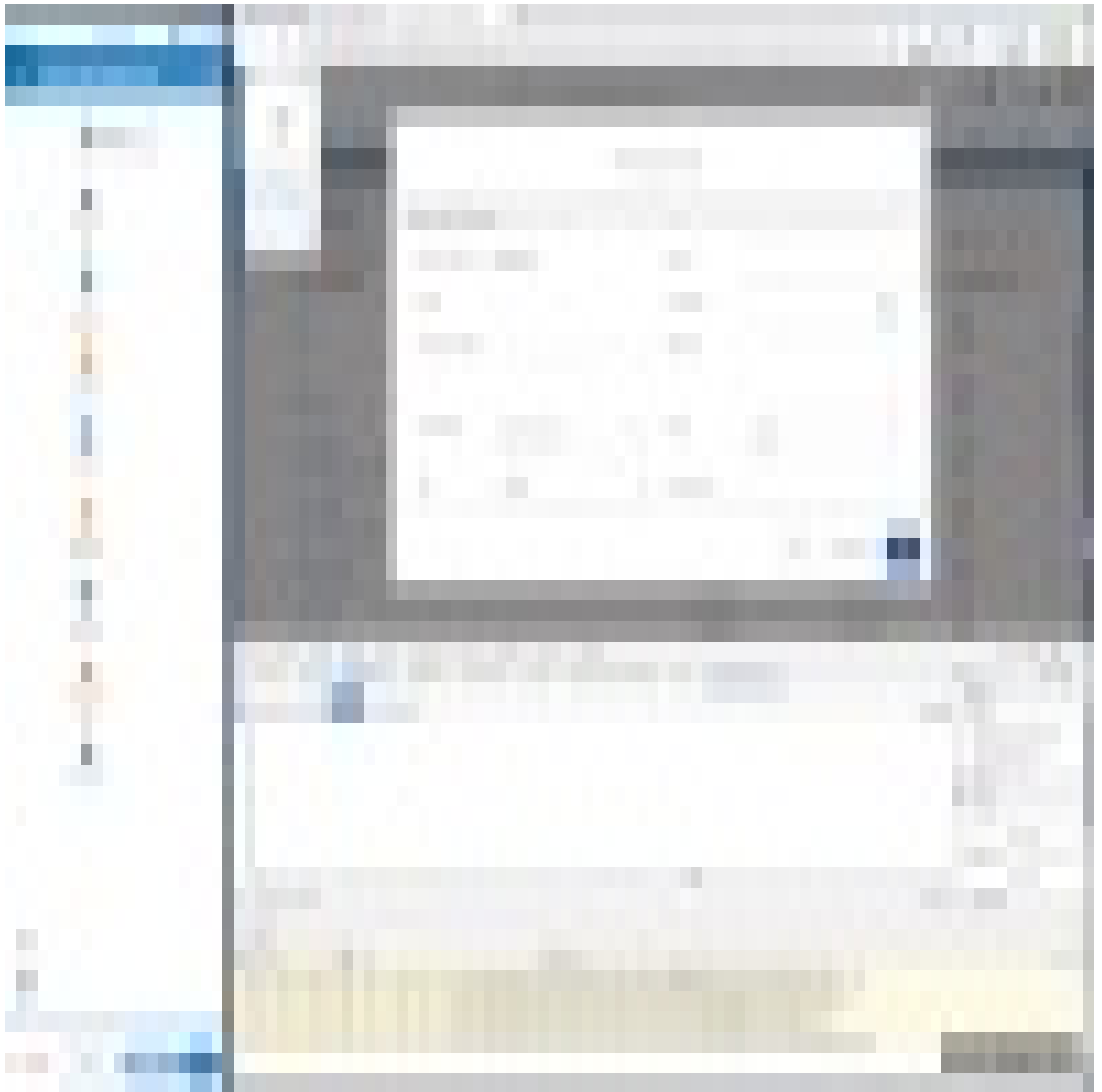


## Introduction to Peer Steps

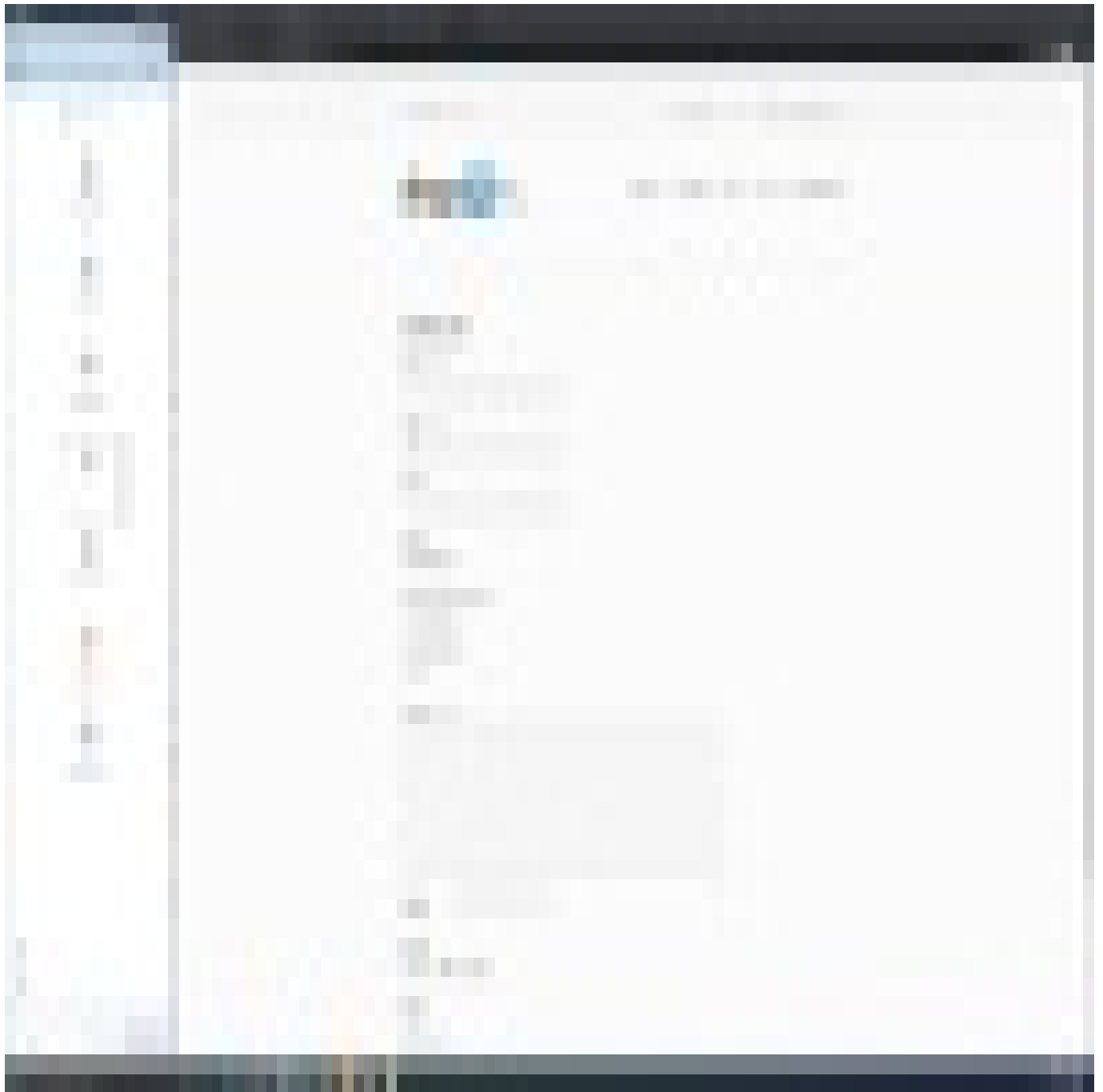




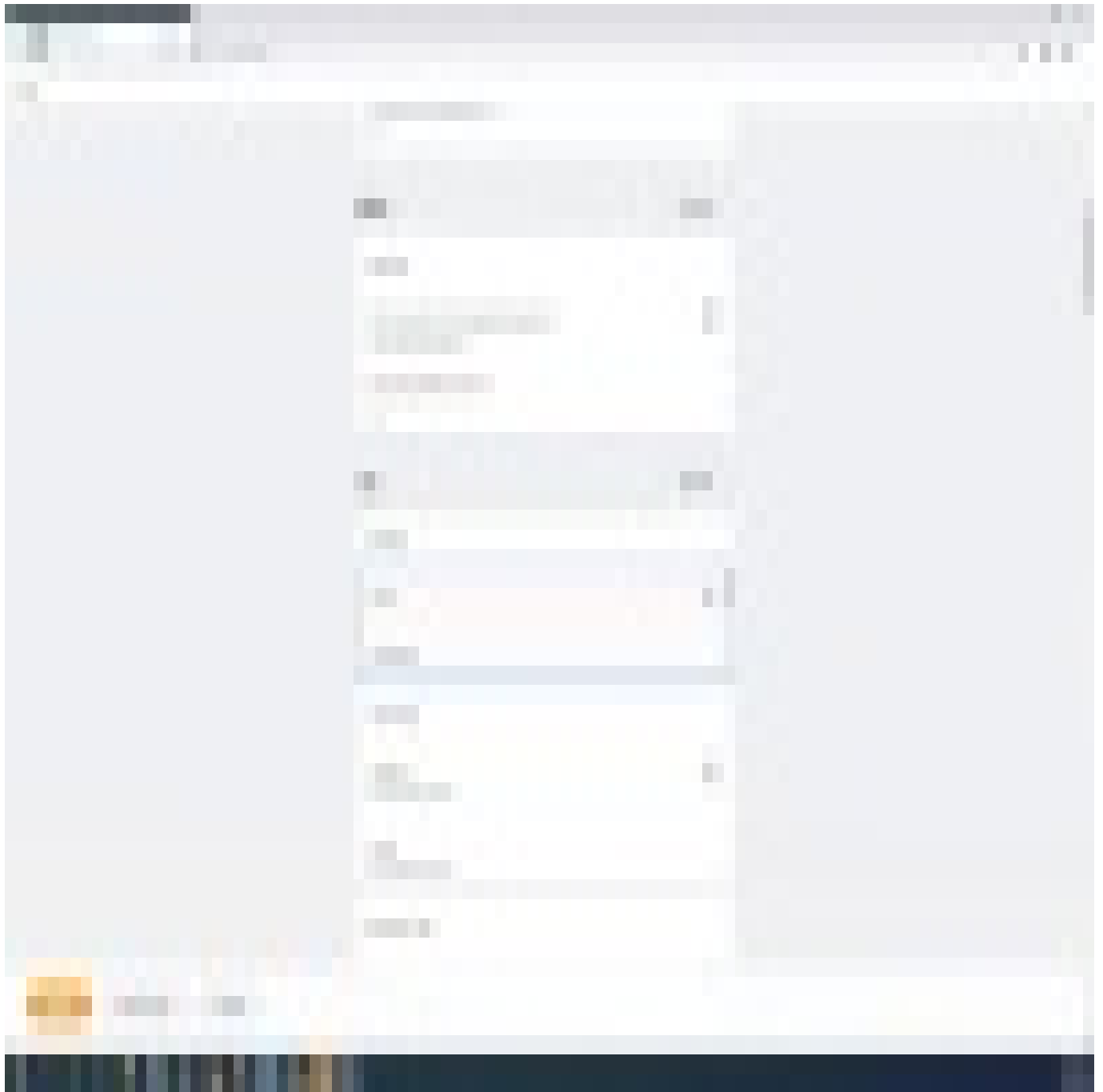
## How to Capture Elements that Quickly Disappear Off the Screen



## How to Display Data from One Page on Another



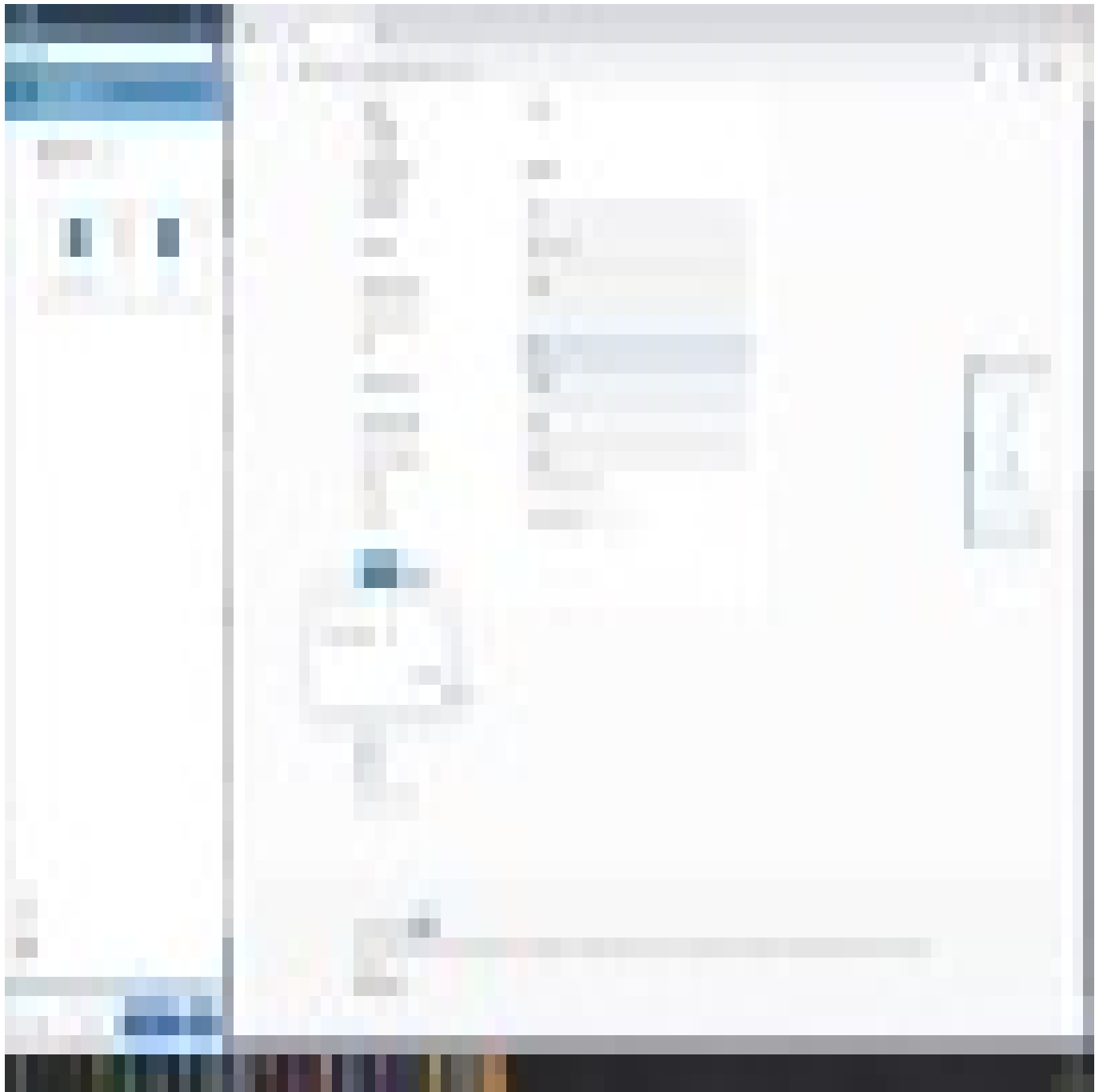
## How to Remove an Arrow on a Smart Walk-Thru Balloon



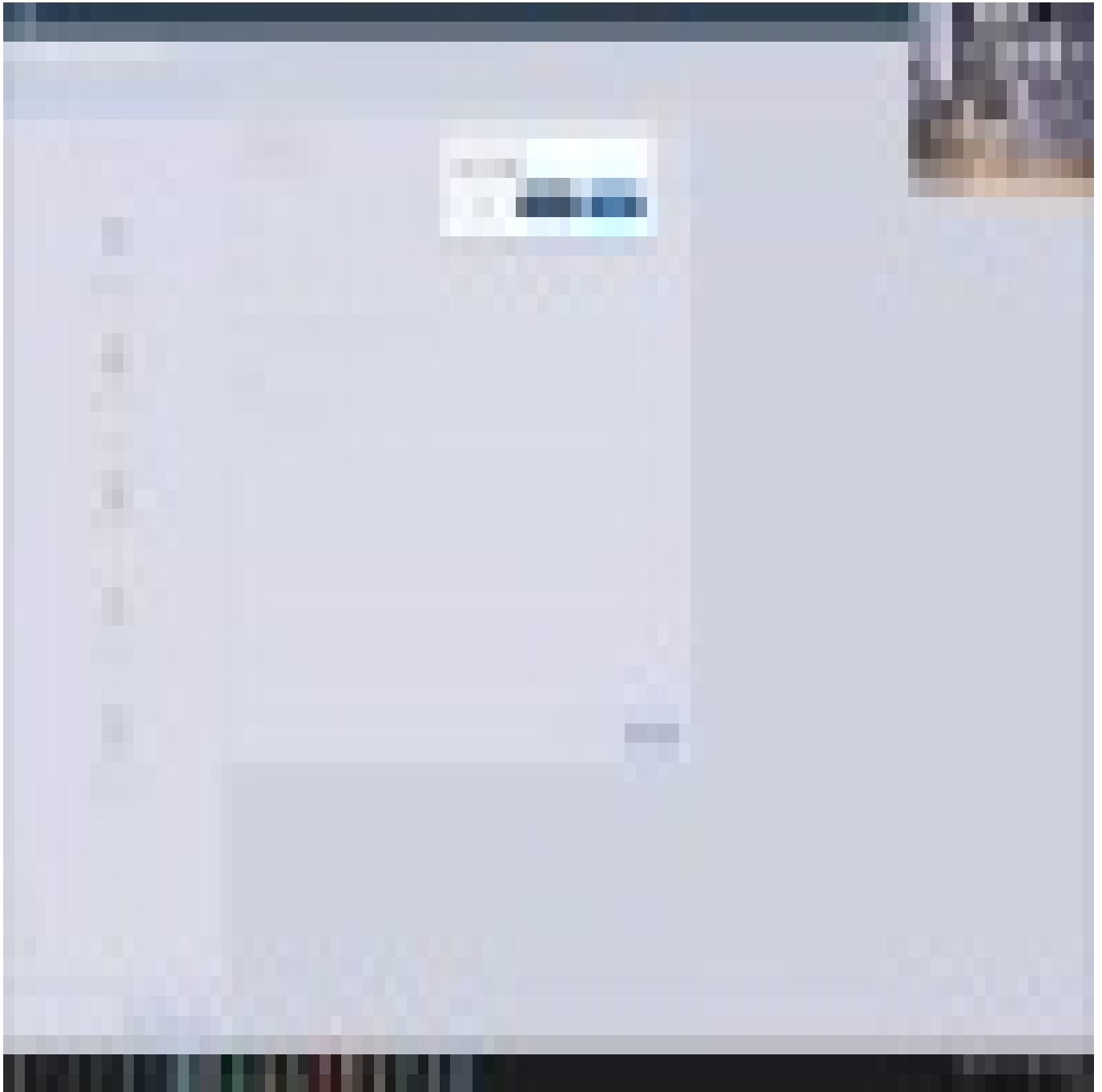


## How to Build Peer Steps

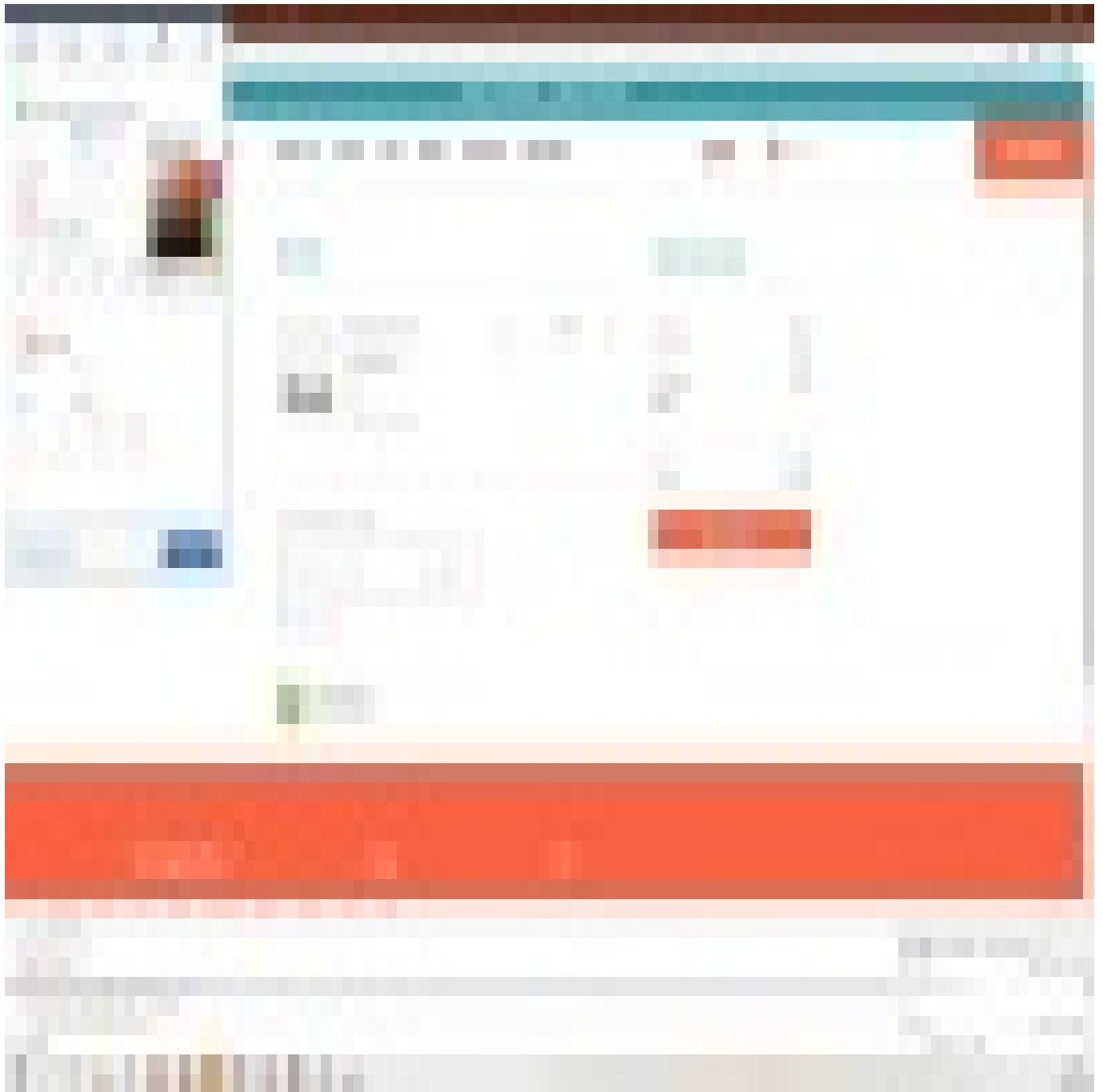




## How to Pull On-Screen Text into a Balloon



## How to Manually Adjust Highlight Size





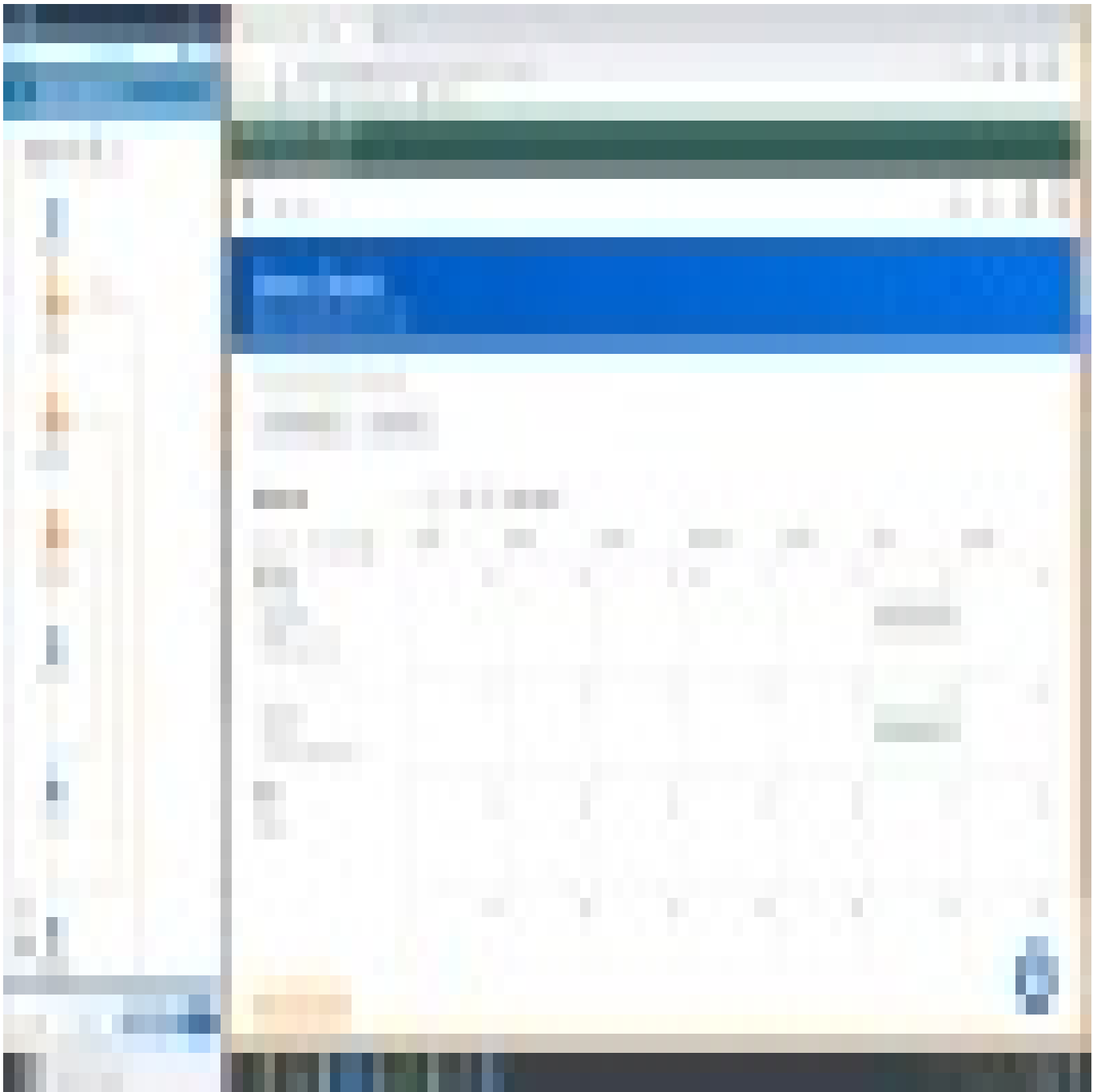
## How to Point Balloons to WalkMe Elements





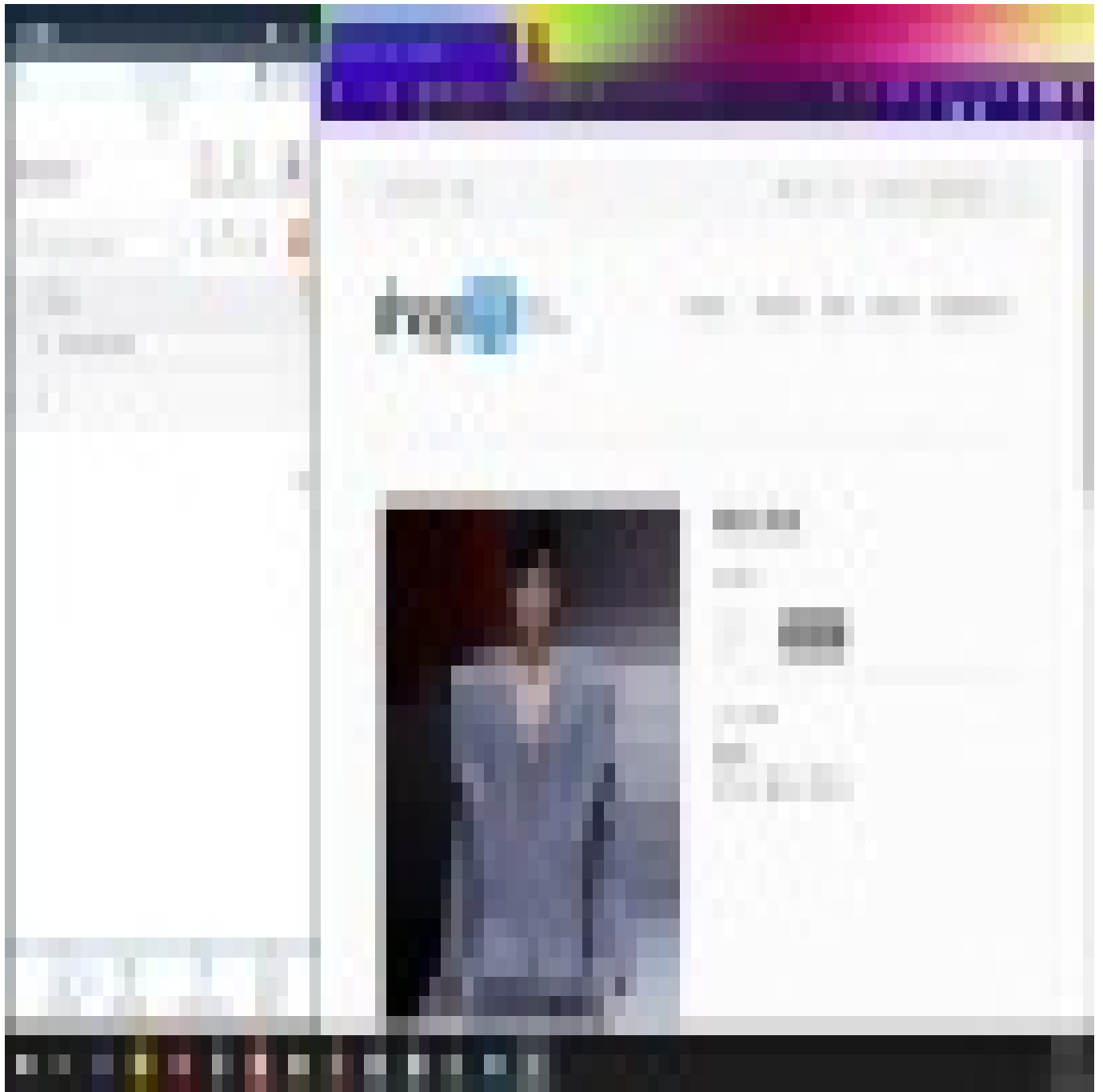
## How to Create an Introductory Message with a Connected Smart Walk-Thru with Start Points







## How to Play Multiple Smart Walk-Thrus at Once



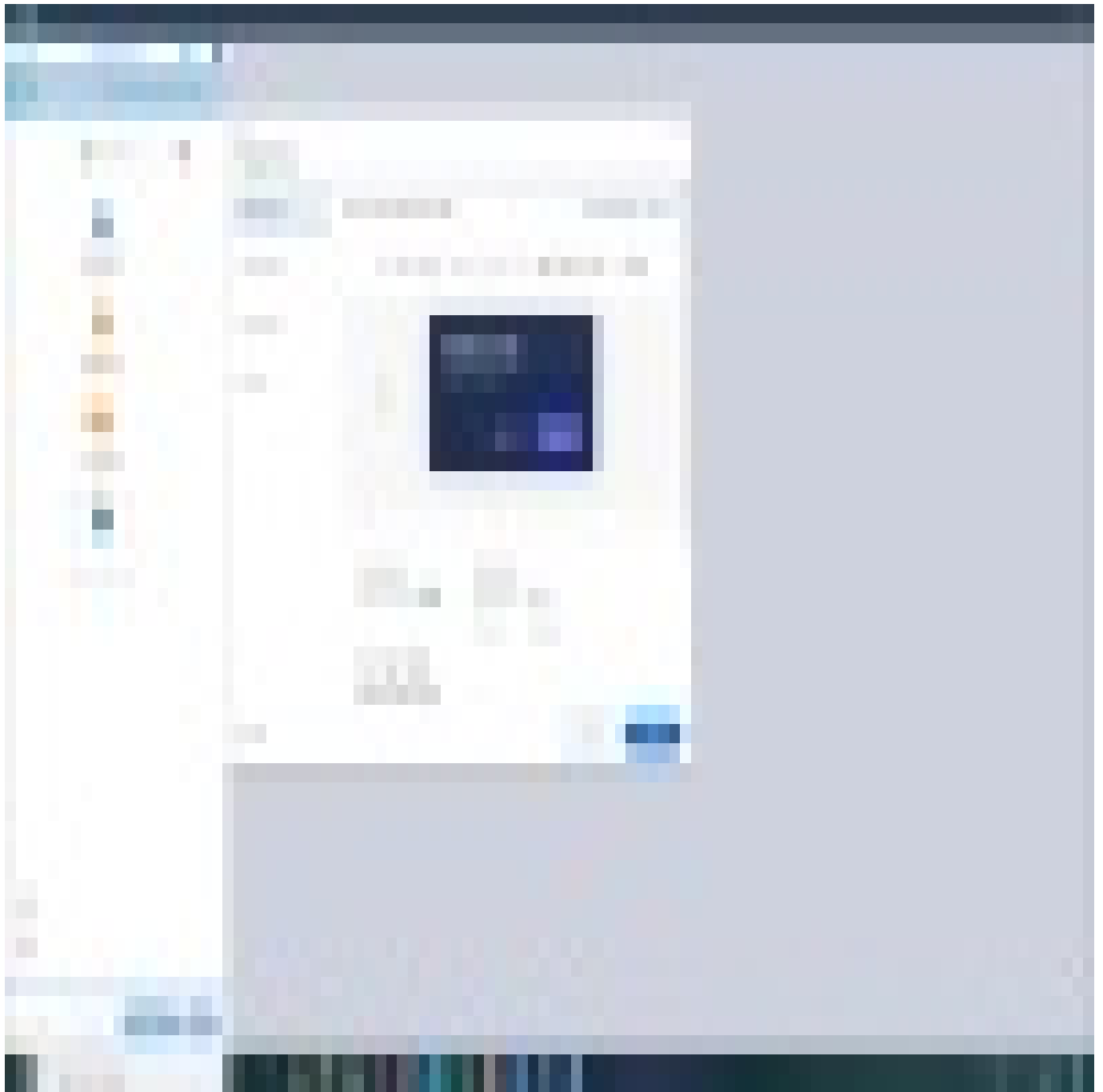


## How to QA a Smart Walk-Thru



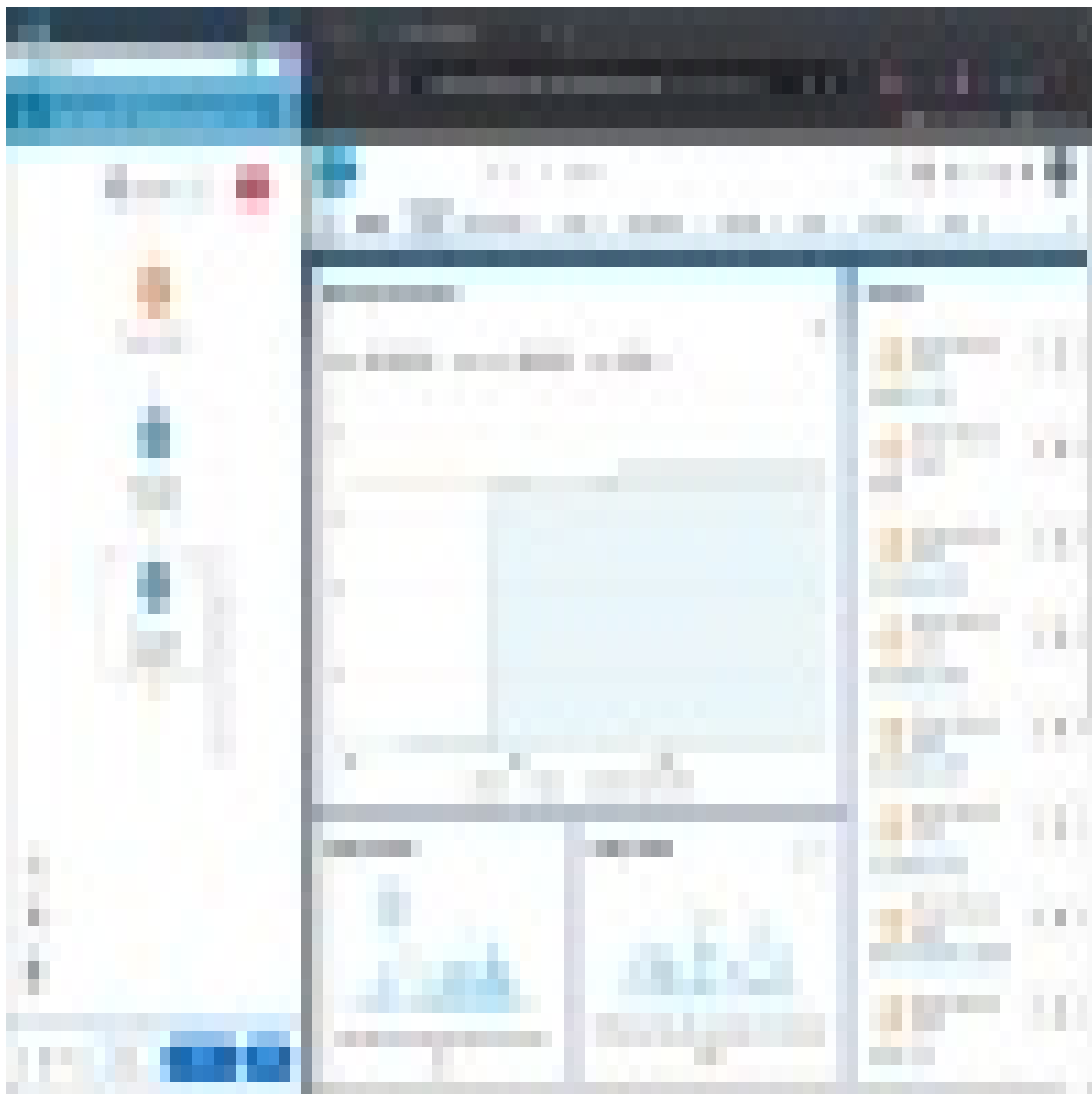


## Building Stable Smart Walk-Thrus for Unstable Websites

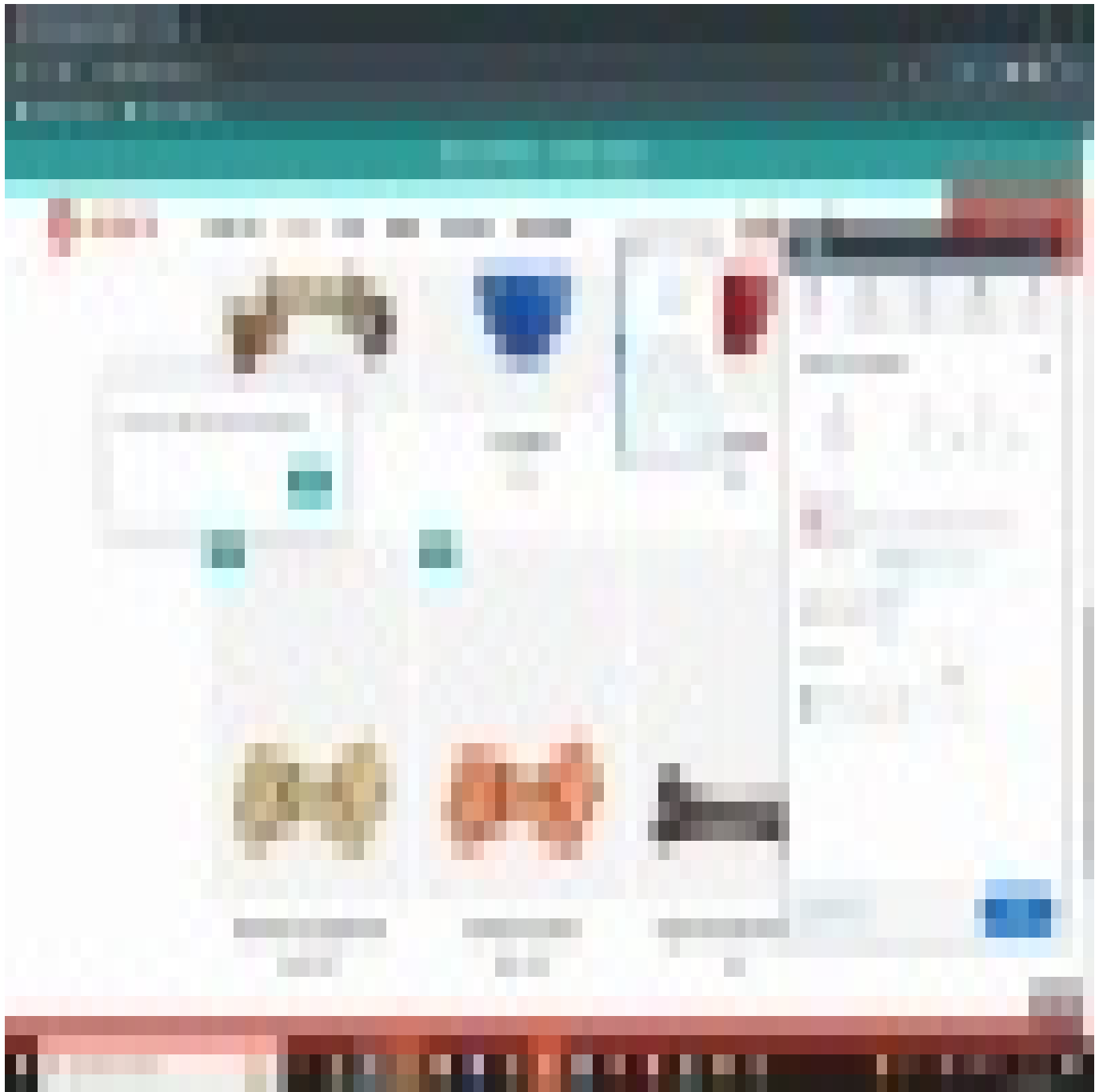


## Block Site Functionality with Spotlight for Overview Flows





## How to use the Balloon Scrolling Setting





Check out [other videos to learn more](#) tips and tricks.