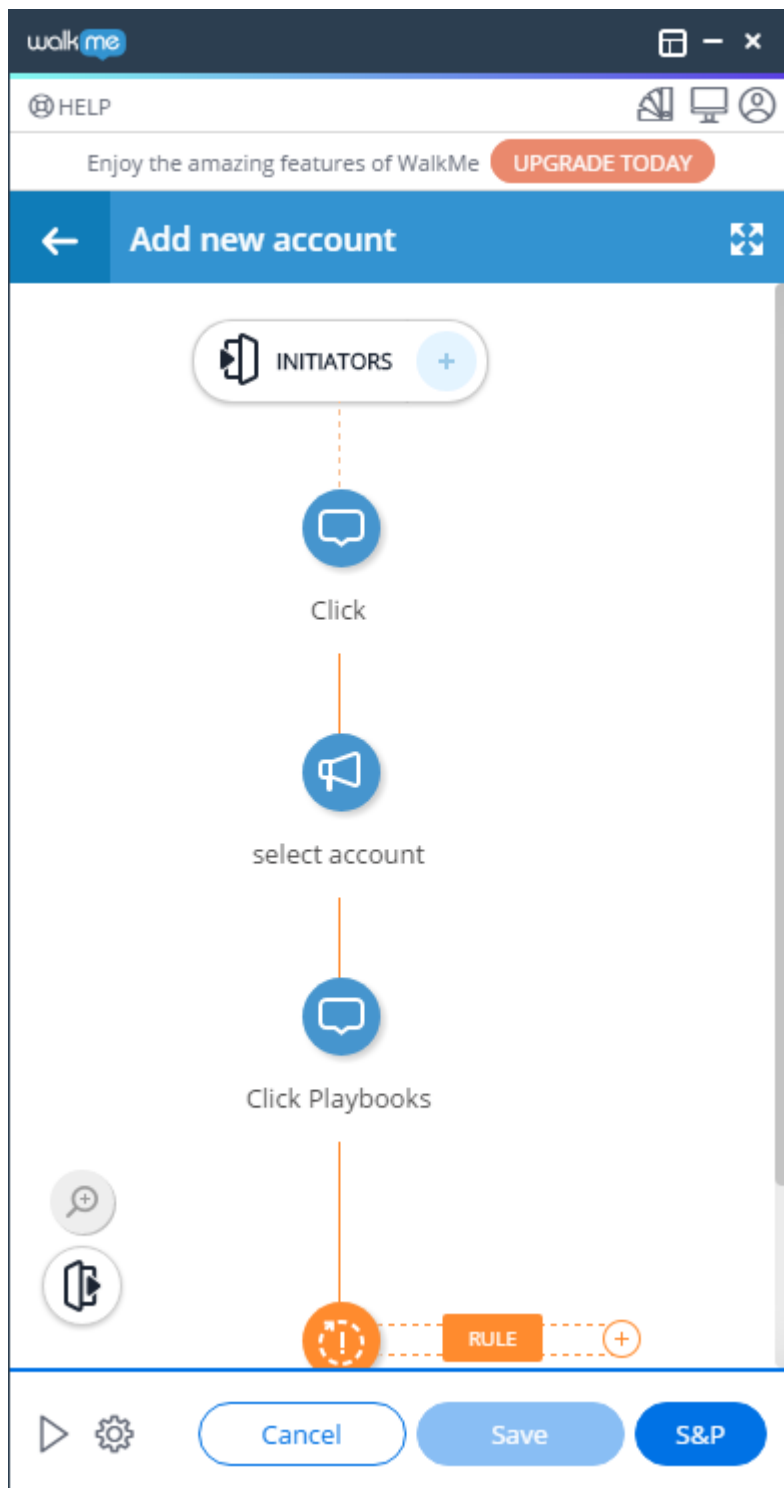


Build a Smart Walk-Thru

Build the Main Path

Each Smart Walk-Thru should focus on a very specific task that needs to be accomplished by the end-user. Name your Smart Walk-Thru something informative so that your users understand what the Smart Walk-Thru will help them accomplish. Plan your Smart Walk-Thru from the home page and be sure to include any navigational steps required to reach the correct page or element. Try and account for other starting places on your site as well, making sure that the steps necessary to exit or go back to a previous screen are present as well. Flow Steps can be added so that these steps only appear when necessary.

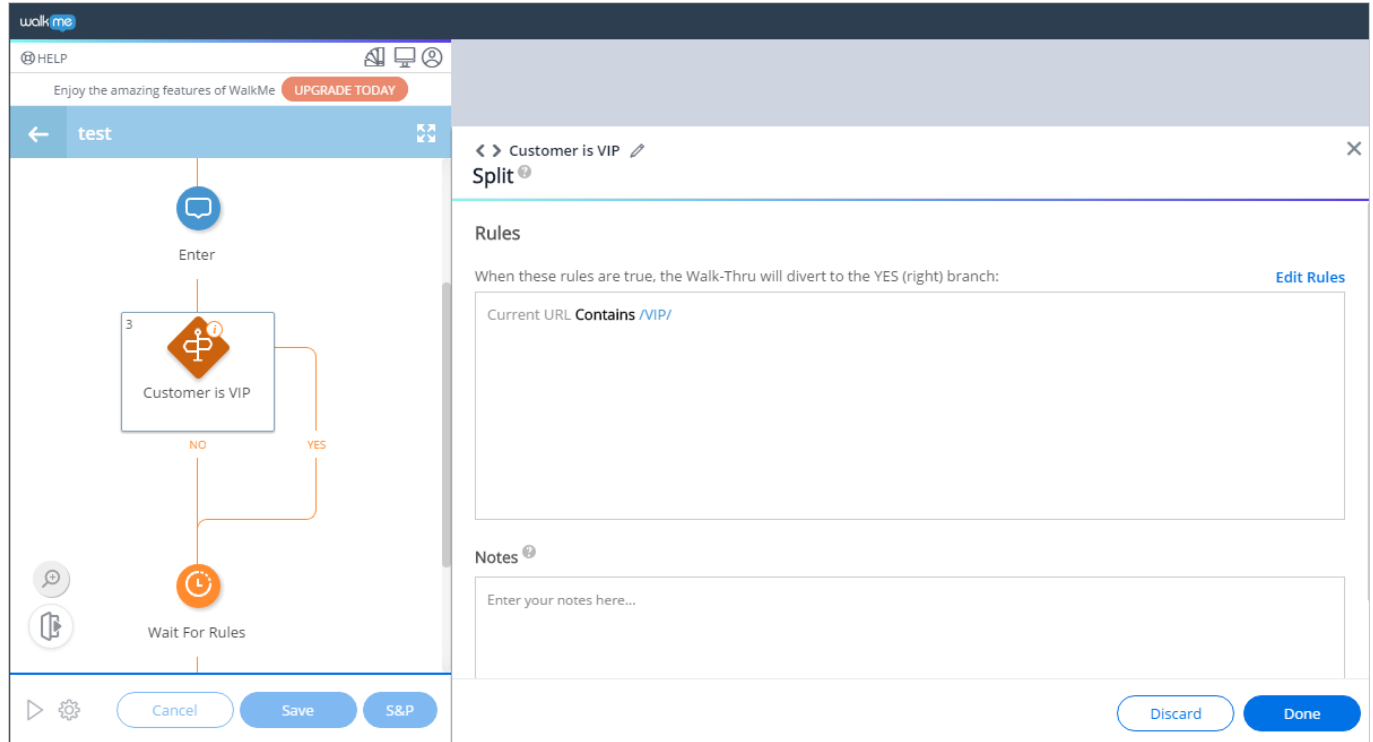
After your navigational steps, your Smart Walk-Thru should focus on the task at hand for your user. Include only steps that are required to complete the process. The best practice is to have your main flow focused on the path or route that the majority of users will take. Keep your guidance simple and the text short to keep users engaged. Make sure balloons do not block any text or important elements on the screen. Avoid steps that provide an overview or detailed information on an element or feature that is not directly related to the process. At the end of your flow, try adding a success popup to encourage your users.



[Learn how to add a step](#)

Add Splits

Your guidance may need to include additional steps that are relevant to a small subset of users or only under certain conditions. Add these steps using a split designed to appear only to the users for whom the steps are necessary.

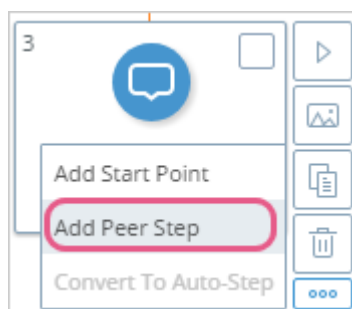


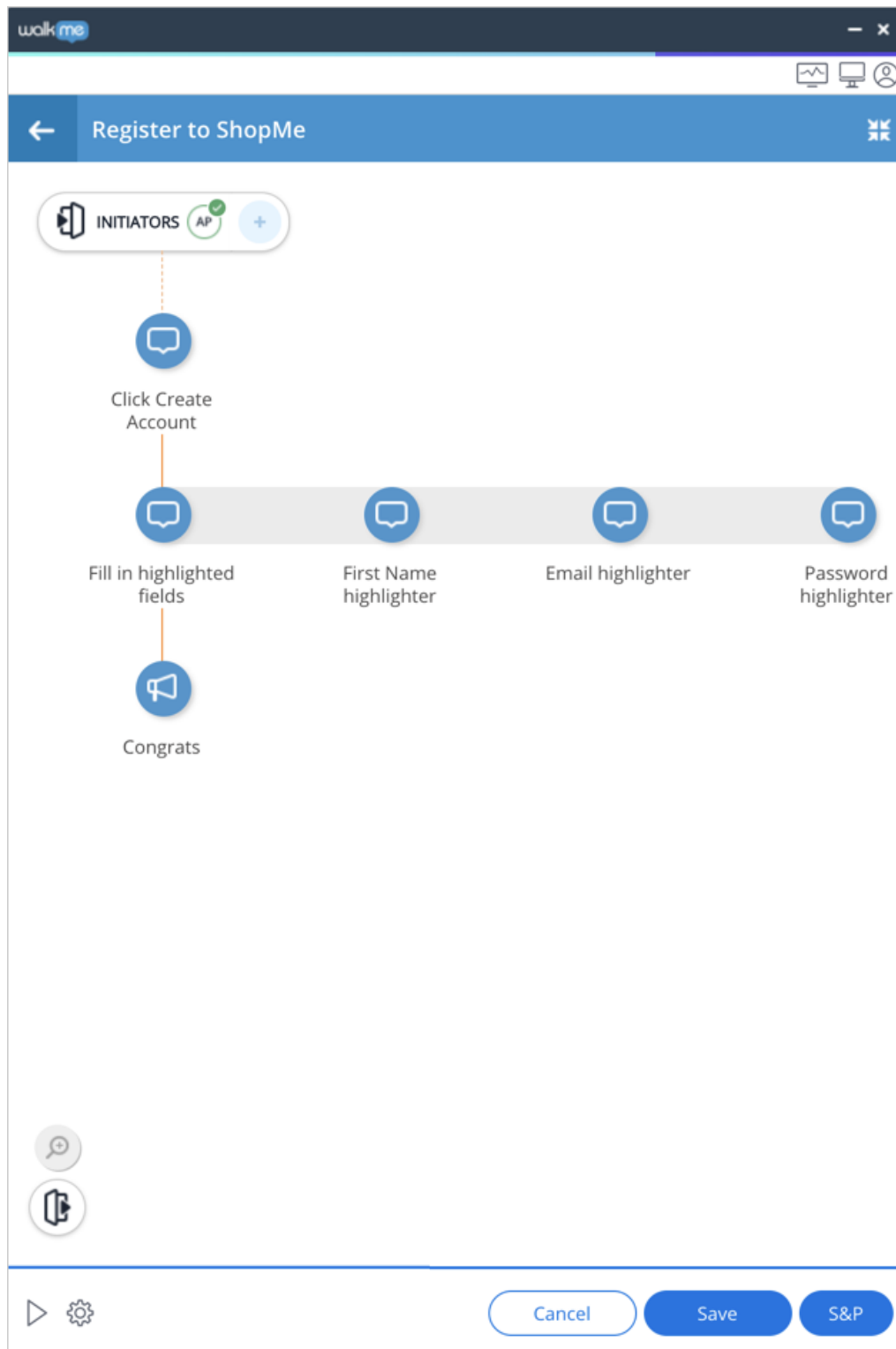
The screenshot shows the WalkMe interface with a 'test' window on the left and a 'Split' configuration panel on the right. The 'test' window displays a flowchart starting with an 'Enter' step, followed by a decision diamond labeled 'Customer is VIP'. The 'NO' branch leads to a 'Wait For Rules' step, and the 'YES' branch leads to the right. The 'Split' panel on the right is titled 'Customer is VIP' and 'Split'. It contains a 'Rules' section with the text 'When these rules are true, the Walk-Thru will divert to the YES (right) branch:' and a rule 'Current URL Contains /VIP/'. There is also a 'Notes' section with the text 'Enter your notes here...'. At the bottom of the panel are buttons for 'Discard' and 'Done'.

[Read more about Splits.](#)

Add Peer Steps

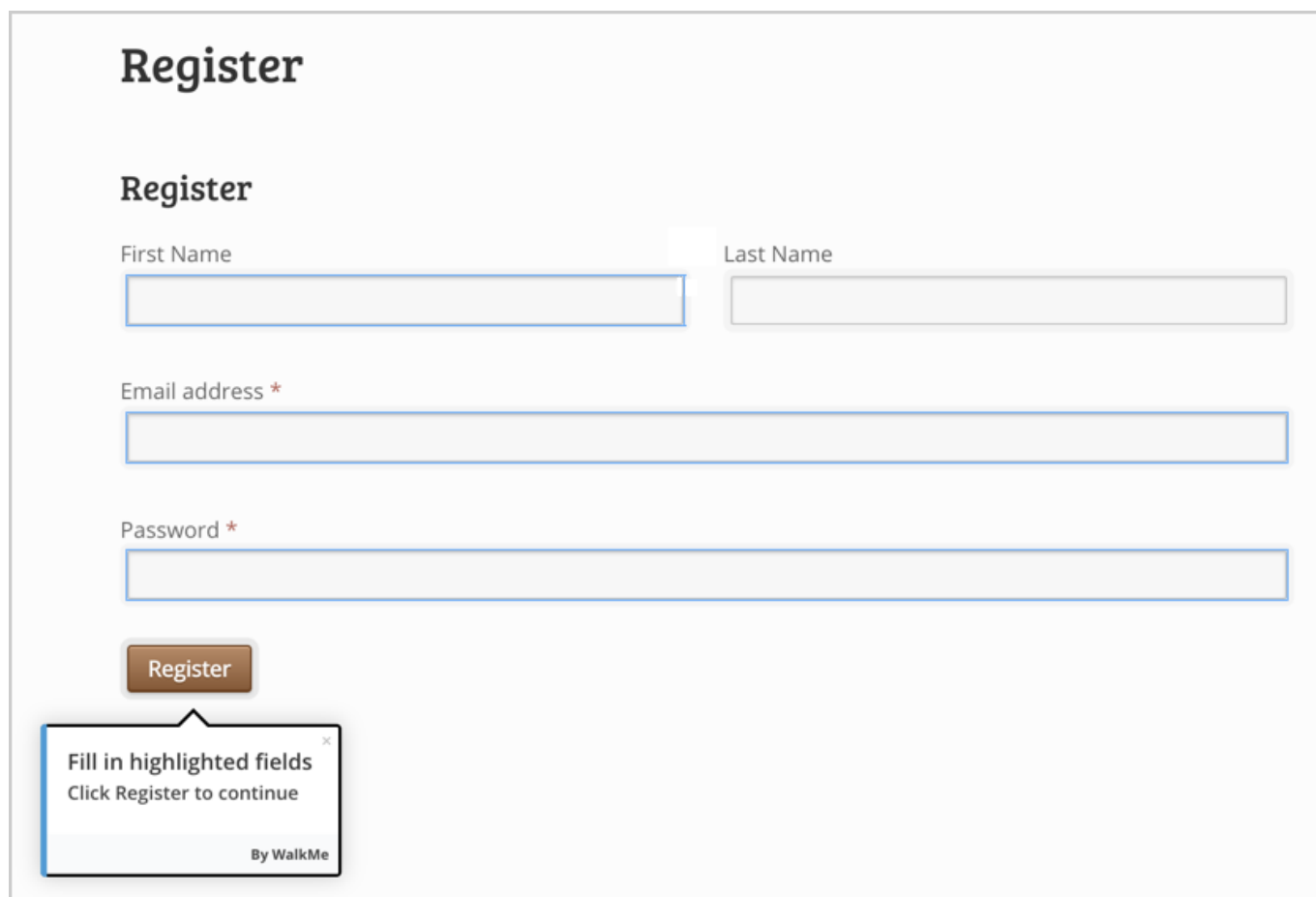
Peer steps provide more guidance and information during a certain point in a process, within a Smart Walk-Thru. They are similar to regular Steps, but they are used to emphasize several points of interest for a single point in time. Any Step within your Smart Walk-Thru can be configured as a Peer step. Each adjoining Peer Step will be displayed when the original step is displayed and all will be triggered by the main Step. You can add as many peer steps as necessary.





An example for using Peer Steps is guiding a user through filling out a form with multiple points (textboxes, radio buttons, etc) that need to be completed, using Peer Steps you can highlight all the

necessary areas, as part of the same step:



The screenshot shows a 'Register' form with the following fields: 'First Name', 'Last Name', 'Email address *', and 'Password *'. The 'First Name' and 'Last Name' fields are highlighted with a blue border. Below the form is a brown 'Register' button. A tooltip box is positioned over the button, containing the text: 'Fill in highlighted fields', 'Click Register to continue', and 'By WalkMe'.

Creating an Invisible Highlighter Peer Step:

Peer steps can also be used as highlighters for text boxes with no balloons at all, do this by:

1. Selecting the Peer Step that you want to adjust.
2. In the Appearance tab, toggle the **Highlighter** on:

Click

Step Options

Learn UX Tips

Interaction

Appearance

Precision

Notes

Accessibility

Appearance

Spotlight Balloon

Highlighter

Customize On Screen

Frames the element and distinguishes it from the rest of the page.

Thickness

1

Color

#55AAFF

hide when hovering over element

Highlighter Position

Position:

Top

0

Left

0

Size:

Width

0

Height

0

3. Toggle the **Invisible Balloon** on:

Invisible Balloon

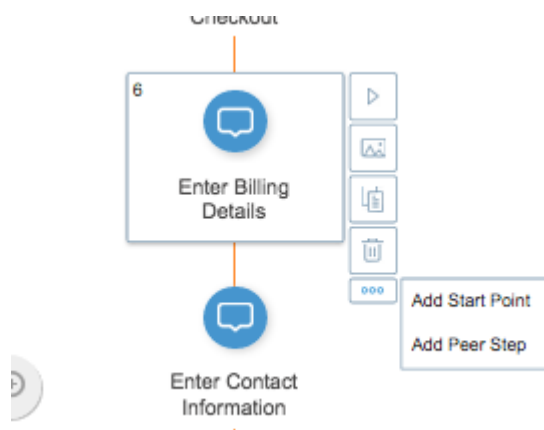
Hide the balloon from the users while keeping triggers active.

Add Multiple Start Points

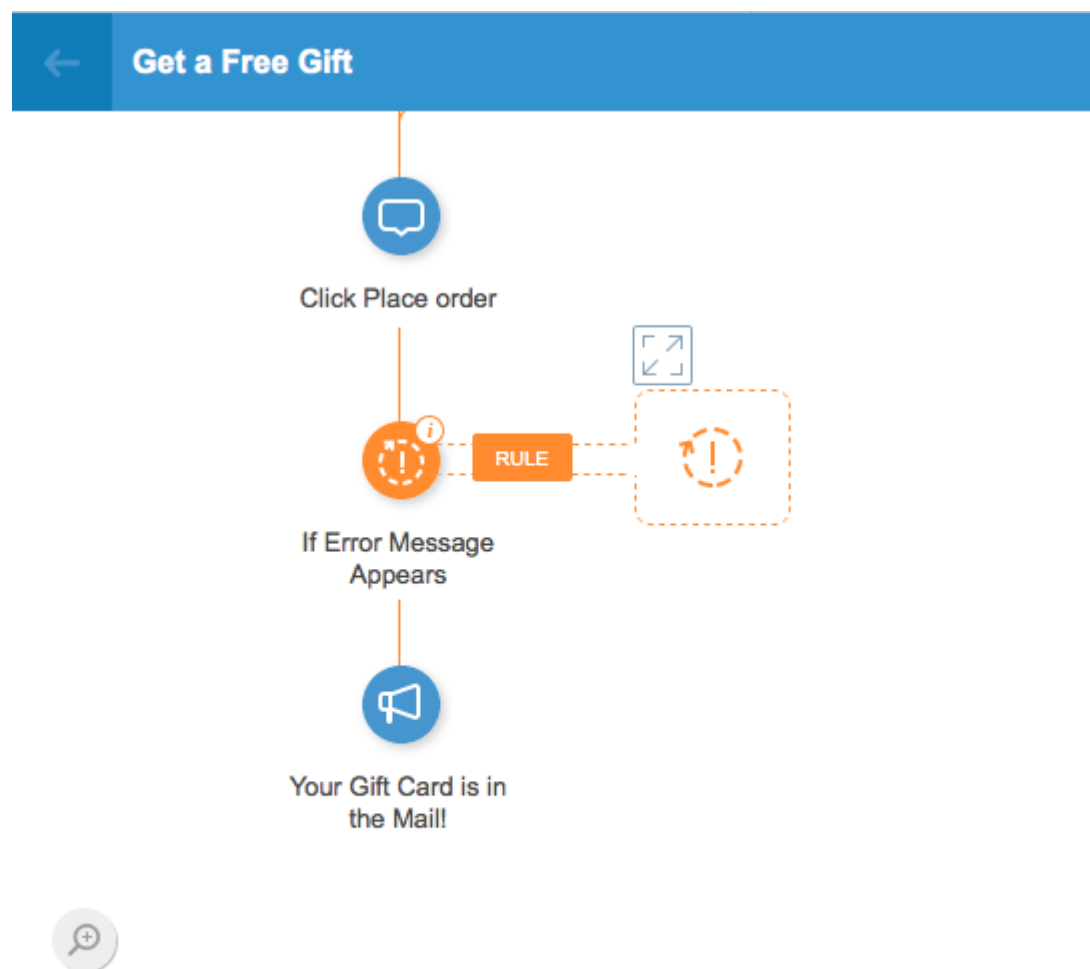
Your user may be halfway through a process before starting a Smart Walk-Thru. In order to make sure the Smart Walk-Thru starts from the relevant step instead of making them start from the beginning, add a Start Point. A Start Point will make sure the Walk-Thru Flow recognizes where the user is in the process and picks up from the appropriate step.



Any step within your Smart Walk-Thru can be configured as a Start Point. Each Start Point will only be activated if the rule defining the starting point are true. Start points are evaluated from the bottom up, meaning that WalkMe checks the rule for the last starting point first.



When creating new Start Points WalkMe pre-fills the rule engine allowing you to simply define the URL to easily create Start Points. In certain situations you may need to edit or modify statements to more accurately determine when the user should start for this step. When using an element on a page for a rule, it is best practice to use a URL in combination with On Screen Element in order to optimize performance.




▶ PLAY ⚙ SETTINGS


[Read more about](#)

[Start Points.](#)

Add Error Handling Groups

Accommodate for users making errors with Error Handling Groups in your Smart Walk-Thru. Use an Error Handling Group to go to steps outside the main flow that can help users correct their mistake. An Error Handling Group is activated when the associated rule is true. Errors can be identified using a URL, On Screen Element (such as an error message), or a combination of the two. Creating a Rule based on the error message will ensure the Error Handling Group will continue to play until the error is resolved. [Read more](#)

< > Error Handling name 

Error Handling Group 

Rules

Redirect the Walk-Thru to the Error Handling Group when the following rules are true. When the Rule becomes false, the flow returns to the main branch.

Edit Rules

On Screen Element(selected) Is Visible

AND

Current URL Contains /error/

Add Goals

All Smart Walk-Thru should have a Goal so you are able to track their value and track if they are successful in helping users achieve their tasks.

There are two types of Goals for a Smart Walk-Thru: a Main Goal and a Milestone. The best practice is to create a Main Goal that checks if users successfully complete a process. Milestones can check different stages in your process. Create your Smart Walk-Thru Goals using a combination of URLs and On Screen Elements to capture the user's action on a specific page.

test
Smart Walk-Thru Settings

Goals
Segmentation
Search Ranking
Advanced Settings

Goals?

To track users success rate and progress in this process, set a Main Goal and Milestones.

Main Goal?

Order placed

Milestones?

[Add a Milestone](#)

Play

Cancel
Save

[Read more about Goals.](#)

Related Resources

- [Read about Smart Walk-Thrus](#)
- [Best practice recommendations for your Smart Walk-Thrus](#)