Editor Help Menu and Walk-Thru Guidance (Permalinks)

Brief Overview

Within the editor, we have created a Help Menu and a variety of Walk-Thrus to help you learn how to build WalkMe content.

A permalink is a link that will go directly to the WalkMe Editor and start the in-app, step-by-step guidance.

You can also access all of these guides, and other resources, from the WalkMe Help Menu in your editor.

Note

You must be logged in to the editor in order for the guidance to launch.

Available Walk-Thru Guidance

Review the processes below, and click the permalink to begin the in-app guidance:

Editor Setup

Editor Setup

Process	Topic Covered	Permalink
View WalkMe In-App Guidance	Opens the WalkMe Help Menu in the Editor	Click here to open the WalkMe Help Menu.
Editor Setup – Complete Guide	Sequential Mini Menu listing all Editor Setup content	Click here to view the complete guide to WalkMe Editor Setup.
Install Editor Extension	Guide to installing the Editor extension on a user platform	Click here to learn how to install the Editor Extension on your browser.

WalkMe Deployment	Guide to installing the snippet on user platform (or instructions to contact AE if using an extension)	Click here to deploy your WalkMe solution on your platform.
Set Up Unique Users	Guide to creating a UUID on a user platform	Click here to set up a Unique User ID on your platform.
User Management	Guide to adding a new user to the WalkMe Editor	Click here to add a new WalkMe User.
Set Analytics Tracking	Shows users how to turn on Analytics Tracking in the Editor	Click here to turn on Analytics Tracking.
Add Unique User ID	Shows users how to add their UUID variable to the Editor Settings	Click here to set up your Unique User ID in the WalkMe Editor.
Add WalkMe ID	Shows users how to use WalkMe ID (if not using a variable) as their UUID in Editor Settings	Click here to use WalkMe ID to identify unique users.

SmartTips

SmartTips

Process	Topic Covered	Permalink
SmartTips – Complete Guide	Sequential Mini Menu listing all SmartTips guides	Click here to view the complete guide to building SmartTips.
Build a SmartTip	Guide to creating SmartTips Sets and individual SmartTips	Click here to build a SmartTip.

Smart Walk-Thrus

Smart Walk-Thrus

	Process	Topic Covered	Permalink

Smart Walk-Thrus	Smart Walk-Thrus – Complete Guide	Sequential Mini Menu listing all Smart Walk-Thru guides	Click here to view the complete guide to building Smart Walk-Thrus.
	Build a Smart Walk-Thru	Guide to basics and best practices of building a Smart Walk-Thru	Click here to build a Smart Walk-Thru.
	Customize Smart Walk-Thru Steps	Guide to customizing appearance and behavior of balloon steps	Click here to customize the appearance or behavior of Smart Walk-Thru balloon steps.
	Add Start Points	Guide to adding Start Points to a Smart Walk-Thru	Click here to create Start Points in your Smart Walk-Thru.
	Add Goals	Guide to adding Goals to a Smart Walk-Thru	Click here to add Goals to your Smart Walk-Thru.

Advanced Smart Walk-Thru Steps	Smart Walk-Thru Steps – Complete Guide	Sequential Mini Menu listing all guides to advanced SWT steps	Click here to view the complete guide to creating advanced Smart Walk-Thru Steps.
	Add Popup Steps	Automated Tutorial on building Popup steps and best practices	Click here to view an automated tutorial on creating Popup steps in your Smart Walk-Thrus.
	Connect Smart Walk-Thrus	Automated Tutorial on building Connect steps and best practices	Click here to view an automated tutorial on creating Connect steps in your Smart Walk-Thrus.
	Add Page Actions	Automated Tutorial on building Page Action steps and best practices	Click here to view an automated tutorial on creating Page Action steps in your Smart Walk-Thrus.
	Add Wait For	Automated Tutorial on building Wait For steps and best practices	Click here to view an automated tutorial on creating Wait For steps in your Smart Walk-Thrus.
	Add Splits	Automated Tutorial on building Splits and best practices	Click here to view an automated tutorial on creating Splits in your Smart Walk-Thrus.
	Add Error Handling	Automated Tutorial on building Error Handling loops and best practices	Click here to view an automated tutorial on creating Error Handling loops in your Smart Walk-Thrus.
	Auto-Steps	Automated Tutorial on building AutoSteps and best practices	Click here to view an automated tutorial on creating AutoSteps in your Smart Walk-Thrus.

Optimization Apps

Optimization Apps

Process	Topic Covered	Permalink
Optimization Apps – Complete Guide	Sequential Mini Menu listing all guides to Resources, Surveys, Shuttles, and Keywords	Click here to view the complete guide to WalkMe Optimization Apps (Resources, Surveys, Shuttles, and Keywords).
Resources Tutorial	Guide to creating a Resource and adding it to the WalkMe Menu	Click here to add a video or article resource to your WalkMe Menu.
Surveys Tutorial	Guide to creating a Survey	Click here to create a WalkMe Survey.
Add a Survey to a Smart Walk-Thru	Guide to adding a Survey to a Smart Walk-Thru	Click here to connect a Survey to a Smart Walk-Thru.
Shuttles Tutorial	Guide to creating and using Shuttles	Click here to create a WalkMe Shuttle.
Add Keywords	Guide to adding Keywords to Smart Walk-Thrus	Click here to add Keywords to optimize search results for your WalkMe content.
Create Automation Process	Guide to creating an Automation Process	Click here to create an Automation Process.

Publish Content

Publish Content

Process	Topic Covered	Permalink
Publish Content	Guide to publishing WalkMe Content	Click here to publish your WalkMe content.
Publish Settings	Shows users how to Publish WalkMe content	Click here to publish your WalkMe Editor settings.

WalkMe Menu

WalkMe Menu

Process	Topic Covered	Permalink
WalkMe Menu – Complete Guide	Menu lists all guides available for the WalkMe Menu	Click here to view the complete guide to using the WalkMe Menu.
Build Onboarding Tasks	Guide to building Onboarding Tasks and best practices	Click here to create an Onboarding Task.

Advanced Building

Advanced Building

	Process	Topic Covered	Permalink
Engagement	Build a Launcher	Guide to building a Launcher and best practices	Click here to build a Launcher.
	Customize Launcher	Guide to customizing a Launcher's appearance or position	Click here to customize a Launcher's appearance or position.
	Add Auto Play Rules to a Smart Walk-Thru	Guide to adding Smart Walk-Thru AutoPlay rules and best practices	Click here to add AutoPlay Conditions to a Smart Walk-Thru.
	Build a ShoutOut	guide to building a ShoutOut	Click here to build a ShoutOut.
Segmentation	Segmentation – Complete Guide	Guide to creating Segments and segmenting content	Click here to segment your WalkMe content to specific users.

Solutions Accelerators

Solutions Accelerators

Solutions Accelerators	Open Solution Accelerator Menu	Click here to open the Solutions Accelerator Menu.
Solutions Gallery	Solutions Gallery Overview	Click here to view the Solutions Gallery.

Insights

Insights

Insights: Complete Guide	Opens the Insights overview menu	Click here to take a tour of Insights.
Set Up Tracked Events	Guides users through process of setting up Tracked Events	Click here to set up Tracked Events.
Create a Funnel	Guides users through process of creating a Funnel	Click here to create a Funnel.
Filter Insights Data	Guides users through process of creating a Filter	Click here to filter your Insights data.