

# Condition Builder

### Brief Overview

Condition Builder is a new WalkMe product expanding the capabilities of the Rule Engine and facilitating the building experience.

The key objective behind this new product is to provide a better user experience for builders and make the process of creating rules easier and more intuitive.







WalkMe Community

Join the conversation in the WalkMe Community!

The supported rule types are:

- Current URL
- Referrer URL
- Element on screen
- Selected element
- jQuery
- Variable
- Cookie
- WalkMe data
- Workday form
- Workday worklet
- Workday subpage
- Workday page
- Workday inbox item
- IDP integration
- CSV integration
- API integration
- Onboarding task
- Behavior based integrations
- Time
- Date
- WalkMe language
- Window size
- Browser type
- Current flow
- Language
- jSON object
- TeachMe course
- TeachMe quiz
- Number/date comparison (previously known as Logic Rule)
- Segment

## Conditions and Rules

When users open the Condition Builder, they will see templates which describe the most common scenarios for the case they're working on now (e.g. user captured an element on screen and opens the Condition Builder from the Launcher Display Conditions).



Rule types

For more information on rule types, see the <u>Rule Engine article</u>.

Selecting one will get them started with predefined conditions and rules.

Create a launcher display condition Choose a pre-defined condition or custom condition							
🔆 All Conditions	Q Search condition (example: Count	ry, Role, etc)					
☆ My Favorites	Screen Context		How to use this gallery				
Categories	Only <b>on this page</b>	On this page, if this <b>modal</b> is open					
ට Screen Context	<b>窓</b> ☆	<ul> <li>(≥)</li></ul>	'				
+ Custom Condition	On this page, if the <b>drop</b> <b>down</b> is seen	On this page, if the <b>form</b> <b>is open</b>					
	8 Å						

Click on the card to see the predefined condition and the suggested rules for how to evaluate it.

The first line is the **condition** – the definition of where the user most likely wants their WalkMe item to appear. Users can type in their definition in the first field – or keep the default one – and select one of the options in the operator dropdown.



If this page is the current page ~	ŵ © 🤌	^
How to evaluate the condition		
Current URL      Contains	ŵ © 🦉	
0		
+ Add Condition		

#### Note

The condition line has no impact on the final result. This line and the text in the field are dedicated for notes and won't affect the rule that user creates below.



atcome: launcher will only appear if these conditions are met					
If this page is the current page ~		Ĩ	10	0	^
How to evaluate the condition					
Current URL      Contains	Mandatory	Ũ	Ō	0	
+ Add Condition					
Wo're upgrading the way to create conditions, click to here more or up the old		Cancol		Do	

The second line is the **rule** or **method** that builder would like to use in order to explain what would represent this page and for WalkMe to understand which page to display the item on.

For every condition there's a default rule – what we thought would be the most common way to represent the selected condition. E.g., for when the page is in the edit mode, a common way to define it would by Element on screen (pencil).

However, user can select out of number of rules which are relevant for their case.

For users creating content for the Workday system, the default rule would be "Workday subpage".



### < Create a launcher display condition 🚺 🕗 🗙 Outcome: launcher will only appear if these conditions are met If this page is the current page ~ 10 🖉 🔨 How to evaluate the condition ① Current URL $\sim$ contains ~ ū 🗅 🥏 D Leave Feedback Ð + Add Condition ③ We're upgrading the way to create conditions, click to learn more or use the old version Cancel

Create a launcher displa Choose a pre-defined condition or cu	eate a launcher display condition ose a pre-defined condition or custom condition							
°Ö́ All Conditions	Q Search condition (example: Cour	ntry, Role, etc)						
☆ My Favorites								
88 My Templates Soon	If this page is on <b>edit</b> mode	If this page is on <b>view</b> mode						
Categories ⑦	8 Å	۵ ۵						
+ Custom Condition	On this <b>modal</b> , if this <b>error message</b> shows	On this page, if this <b>button is disabled</b>						
	(S)	<b>8</b> ☆						
	On this <b>form</b> , if this field	If this <b>hidden section</b> is						

All the rules that are relevant for the selected condition can be seen under one dropdown.



This has changed compared to the Rule Engine, where rules are grouped under a few categories (e.g URL  $\rightarrow$  Current URL / Referral URL), and the location of some isn't obvious (e.g. User Data  $\rightarrow$  Cookies / Variable ...).

< Create a launcher display condition Outcome: launcher will only appear if these conditions are met	📭 📀 ×
If this page is the current page ~	û 🗅 🔗 ^
Current URL Current URL Current URL Current URL	ti 🗅 🥑
↔ Referrer URL       ↔ Element on screen	) Leave Feedb
If $\diamondsuit$ Selected Element is seen $\checkmark$ How (X) jQuery element The Variable	
WalkMe Data We way and may and may and create conditions, click to learn more or use the old version	Cancel Done



#### Launcher Display condition 💚

#### Create a rule to determine when the Launcher displays

Group		Import Rules
User Data	Şelect a Type ▼	[] 百 …
	Cookies	
Add Rule	Variable	
	WalkMe Data	
	JSON Object	
Current Statement: Waiting		Save as Segment Cancel Done

×

### Rules' Names and Icons

Here are a few changes compared to the Rule Engine:

- On screen element changed to "Element on screen"
- Instead of the "color and initials" icon each rule type had, there is now a unique icon per rule type illustrating the rule

### Grouping

Grouping of rules and conditions is done automatically (manual grouping is not possible yet).

When there are two rules under one condition and at least one rule outside of that condition – rules under one condition will become a group.



Create a launcher display condition Dutcome: launcher will only appear if these conditions are met			?	0	×
If this page is the current page ~	Ū	Ō	•	^	
How to evaluate the condition					
Current URL      Contains      https://impersonation.walkme.com	Ū	Ō	0		
And O					
⊕ Element on screen      ∨	Ū	Ō	0		
• k					
And $\diamond$					
) We're upgrading the way to create conditions, click to learn more or use the old version	Cancel		Do	one	

### Advanced Condition

While we recommend to work with the suggested conditions which cover the most common use cases and save time, there's also a possibility to create an advanced condition from scratch.

It is designed for experienced builders who wish to work on more complicated use cases and don't find them among the suggested options.

The Advanced Condition template can be reached via the dedicated icon next to the search bar on the conditions options screen.

The title bar will expand based on the amount of text, and all the available methods can be found in the dropdown.



If this page is the current page  How to evaluate the condition  Current URL  Contains  https://knowledge.walkme.com/p	Ū	0	0	^
How to evaluate the condition  Current URL	Ū	Ō	0	
Current URL  Contains   https://knowledge.walkme.com/p	Ū	Ō	0	
3				
+ Add Condition				
We're upgrading the way to create conditions, click to learn more or use the old version	ncel		Dor	ne

### Other Features

Moving rules and conditions around

Conditions and rules can be moved around using drag&drop.



If this page ~	Û	Ō
How to evaluate the condition		
Current URL · value is like · walkme.com		
And $\diamond$		
□ ♦ Selected Element ×		
And $\diamond$		
C Element on screen		
•		
+ Add Condition		

### Moving Between Versions

- When going to the Condition Builder from the Rule Engine, users will be able to see all the existing rules in the same was as they're presented in the Rule Engine
- Although we covered most of the possible cases, there're some rules that temporarily cannot be transferred to the new Condition Builder (we're monitoring those). In case user tries to transfer one of those rules, they'll get a warning message explaining this. They can either continue and lose their rule in the Condition Builder, or go back to the Rule Engine where the rule will be available.



waking					
=	17				
Open Chrome browser to start building t	WalkMe content				~
Default >	Test 🗸 🛞	Purchase Order Form		Create a rule to determine when the Launcher displays	^
· All Items →		Launcher Options		View condition builder has arrived Try BOR	
Q. Search for items	) () = ()				
A Home	C7 (0 ÷			Group	Import Rules
📄 📄 Offer guided help		Display Condition	Update rule	🖸 🚺 URL 💌 Current URL 💌 Matches 💌 https://shapme.waikme.com/	08
Introducing WalkMe (2)			Constantly check the condition to decide whether to		
Onboarding	4 :	Appearance	Segmentation ®		
📄 🚝 🛛 Add an Item to Cart	1 D E			🖸 🙆 On Screen Element. 💌 Ca 💿 💿 Is Not Visible 💌	08
🗌 😂 o FT Test				I And ↔	
📃 🧳 👳 Purchase Order Form				😳 🚳 WalkMe Language 💌 Is 💌 Canadian Engl 💌	00
📄 🐺 🛛 Purchase Order Form					
🗌 🍐 😐 New ShoutOut	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1			Add Rule	
🔄 📑 😐 Purchase Order Form					
🗌 🍐 😐 New Feature					
🗌 🧳 😐 New Feature 2					
📃 🔚 🛛 Untitled Smart Walk-Thru					
Confluence Survey					
📃 📑 😐 New Launcher					
🗌 🍐 😐 Untitled ShoutOut (Classic)					
🗌 🍐 😐 New Feature 2 (2)					
🗌 🇳 😐 Untitled ShoutOut				*	
🔄 🕞 😐 Tracker Test	1 D 3				
🗌 🕞 😐 FT TEst					
Preview Customize Soluti	ions Menu			Current Statement:	Done

- It is always possible to switch back to the old version of the Rule Engine by clicking on the "use the old version" link on the condition screen.
- Note that any unsaved changes will be lost. However, the conditions which were saved, will be moved to the old version.

Create a launcher display condition Outcome: launcher will only appear if these conditions are met		<b>1</b>	×
If this page is the current page ~	Ū	□ ⊘ ^	
How to evaluate the condition	Ŵ	0	
•			ve Feedback
+ Add Condition			D Lea
*			
(1) We're upgrading the way to create conditions, click to learn more or use the old version Cana	cel	Done	

71 Stevenson Street, Floor 20 San Francisco, CA 94105 | 245 Fifth Avenue, STE 1501 New York, NY, 10016 | 421 Fayetteville St STE 215 Raleigh, NC 27601 www.walkme.com