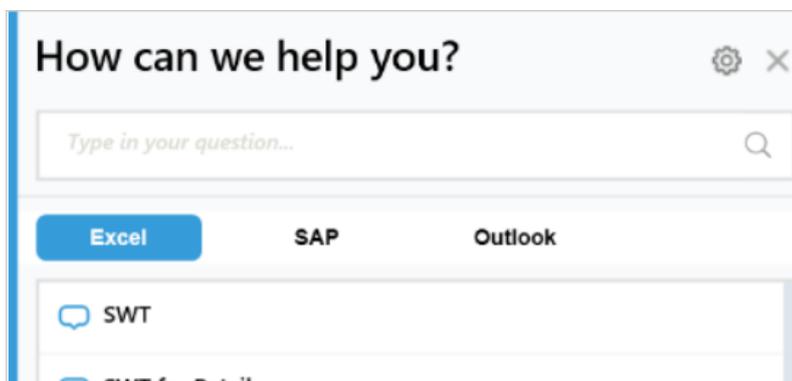# Desktop Best Practices

Brief Overview

To create the best solutions for your users, it is recommended to follow some best practices when creating content with WalkMe Desktop. So you can guide your users in the most efficient way possible.

Desktop Best Practices

- Create tasks to onboard your new employees. These can be linked to important pages they should visit (e.g. setting your equipment) and important processes (eg. CRM tour)
- Use tabs and folders in the widget to help the user navigate and find help for each application:


- User search terms to help users find content.
- Customize the widget with your brand colors to make it look more natural to the environment.

For Desktop best practices when working with SAP, see here.
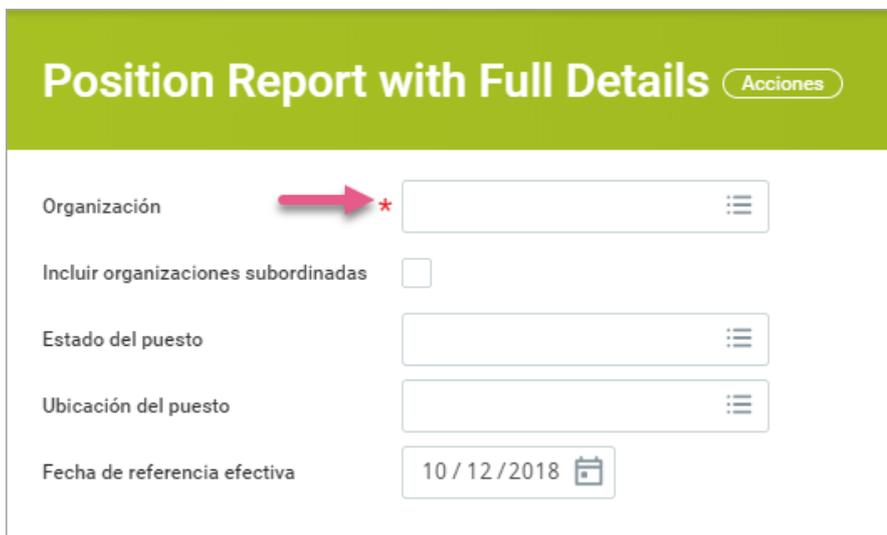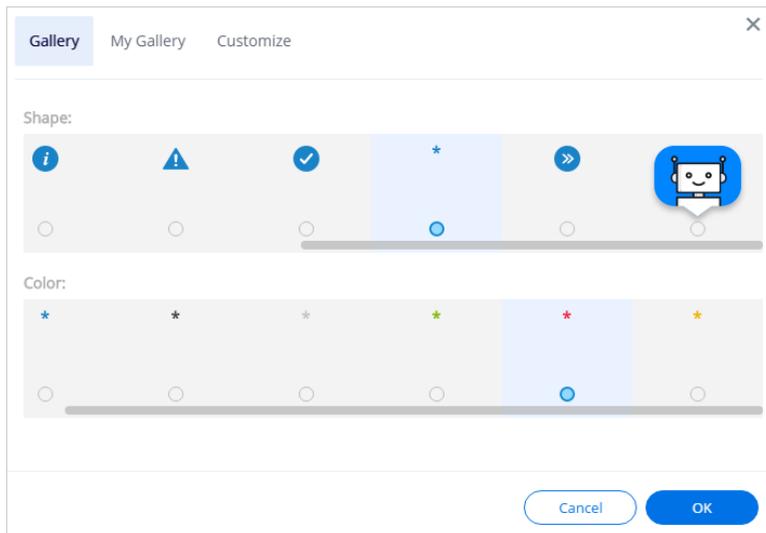
Smart Walk-Thru Best Practices

- Create short navigational Smart Walk-Thrus to get your users to the correct place.
- Create simple flows – We recommend keeping flow below 20 steps (ideally, with 8-10 balloons)

- Try not to use more than one balloon per page. This could crowd the page and confuse users.

- Avoid adding balloons in forms where more than one guidance tool is needed, use SmartTips instead.

- Make use of inline images to explain processes:
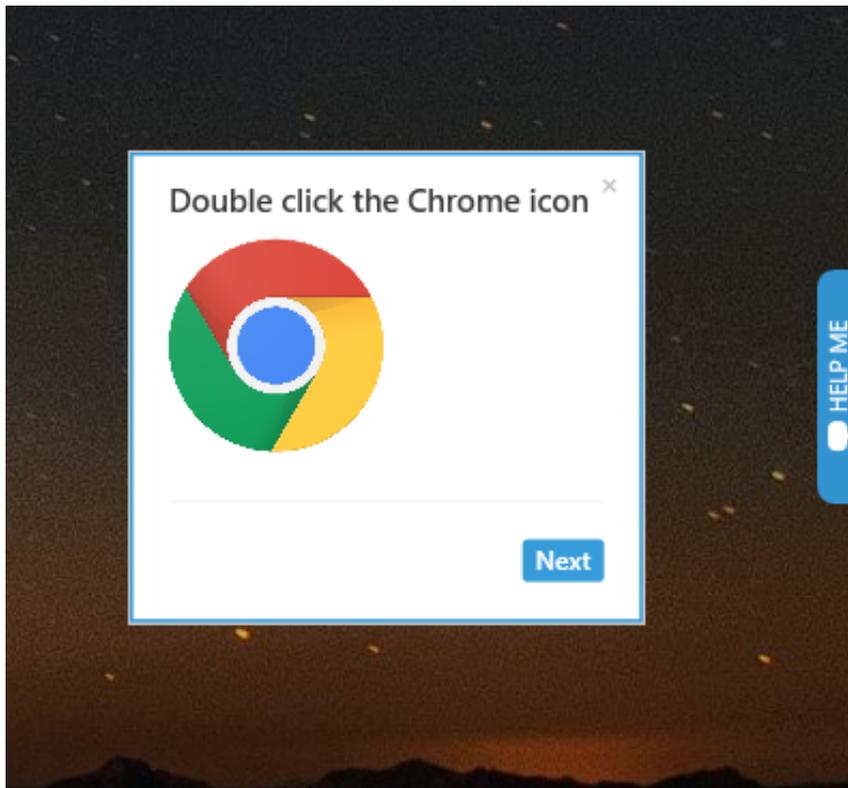
SmartTip Best Practices

- Use SmartTips in place of long Smart Walk-Thrus for contextual guidance.

- Use SmartTips to guide users through complex forms.

- Make sure you capture the entire field area (input and name together) and always locate your SmartTip on the same side for each field areas (either next to the name — on the left — every time or next to the input — on the right — every time).

- Use a consistent naming convention to identify SmartTip Sets. For example: "Job Requisition- Compensation Form."

- In the WalkMe Editor, organize SmartTip Sets per page, not per process.

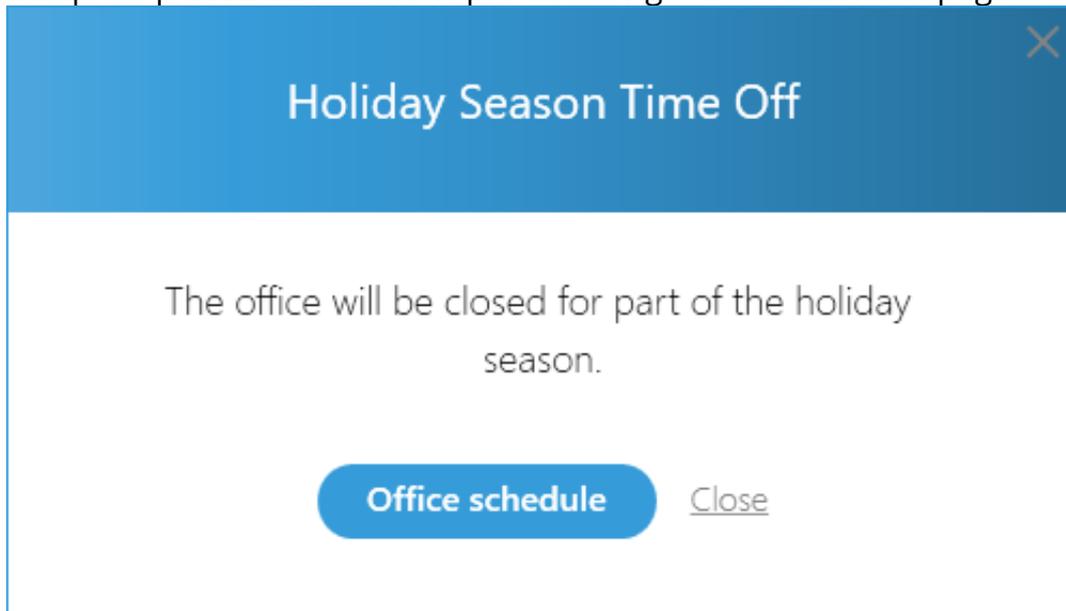- Use the red asterisk icon from the Editor to mark mandatory fields:

Launcher Best Practices

- Place Launchers in strategic places on your Desktop platform. Focus on places where a user might be starting a process.
- Use Launchers to initiate your Smart Walk-Thrus, to create a smooth process flow, especially when starting a challenging process.
- Customize the text within the Launcher to clearly identify the action it will complete.
- Give Launchers clear and straightforward names in the Editor, to stop a mix up later on.

ShoutOut Best Practices

- Use the Notification Center to organize ShoutOuts.
- ShoutOuts can be used to inform users on company events, announcements, etc
- Use Segmentation to strategically display ShoutOuts to specific users.
  - You can segment messages per department/location using active directory.
- A well-timed ShoutOut at the beginning or end of a quarter can help push staff to complete performance review processes right from the home page.

Holiday Season Time Off

The office will be closed for part of the holiday season.

Office schedule   Close

- Use a ShoutOut to launch frequent processes from strategic locations in your site.