

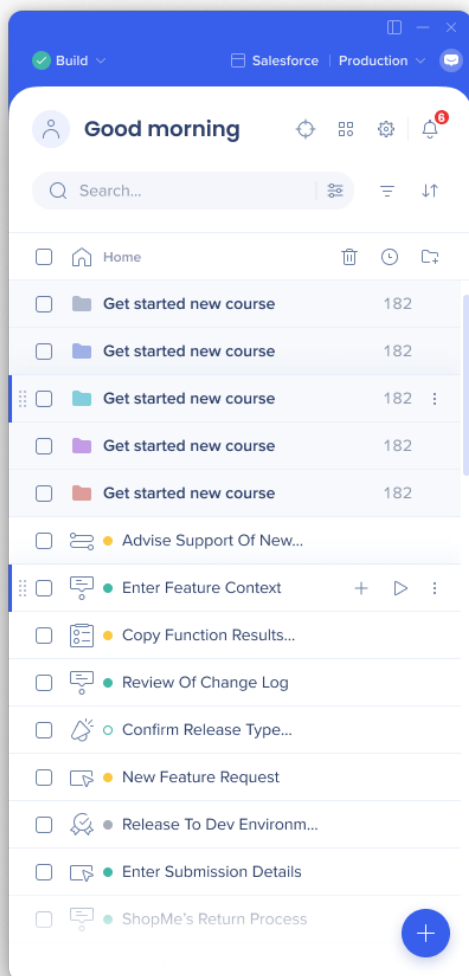
Introduction to the Editor

Brief Overview

The WalkMe Editor is used for building, managing, and publishing Smart Walk-Thrus and other WalkMe Apps. Once the editor is installed on your computer, simply download the editor extension to your browser of choice to start building.

For more detailed guidance on how to install the editor, please follow the instructions in the following article: [Install the WalkMe Editor](#)

[Learn more about the editor experience.](#)



Watch the WalkMe Beyond: Editor 101 Webinar

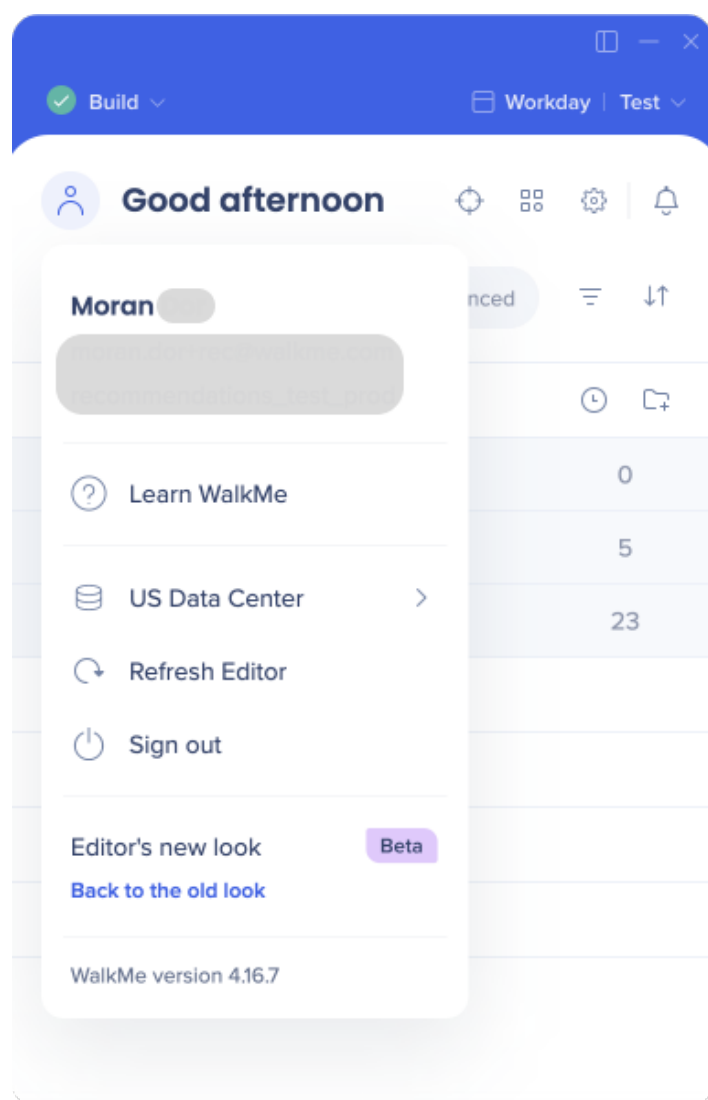


WalkMe Community

[Join the conversation in the WalkMe World Community!](#)

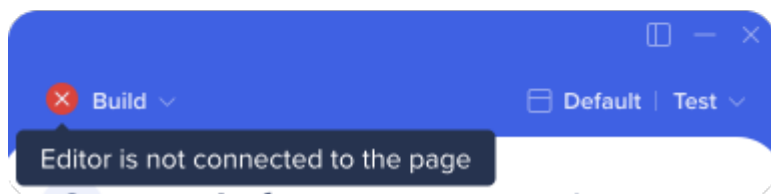
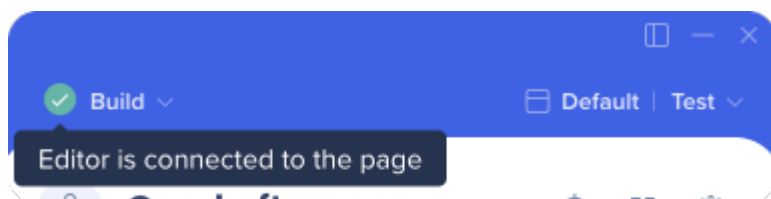
Editor Profile/User Menu

- In the user menu, you can access actions and information for your specific user profile



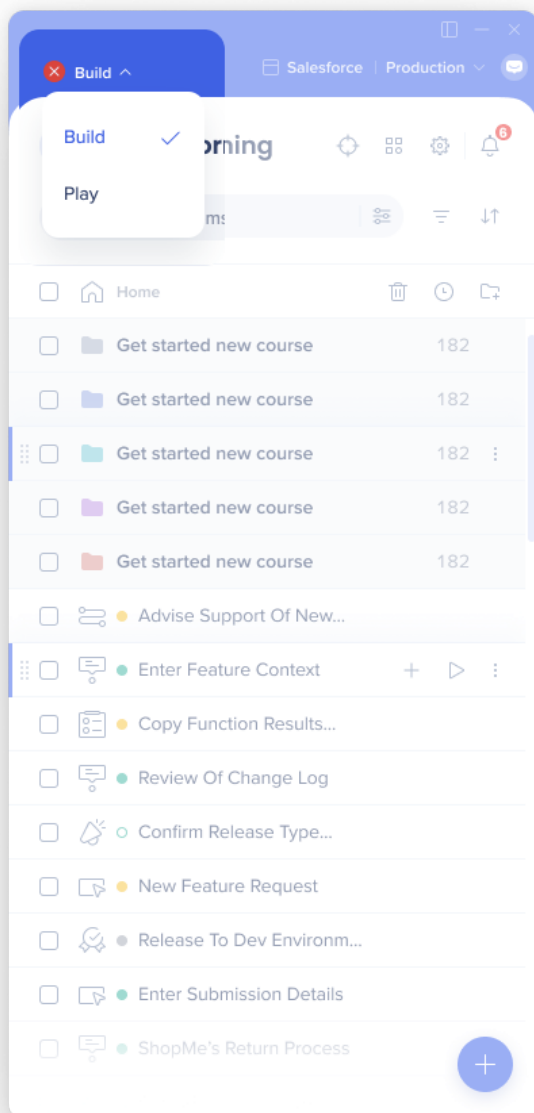
Connection Icon

- The circle icon in the upper left indicates if the editor is connected to the browser
- The editor must be connected to the browser to build WalkMe content
- **Green checkmark:** Editor is connected to the page
- **Red X:** Editor is not connected to the page (make sure you have the page open which you're building on)



Build/Play Mode Selector

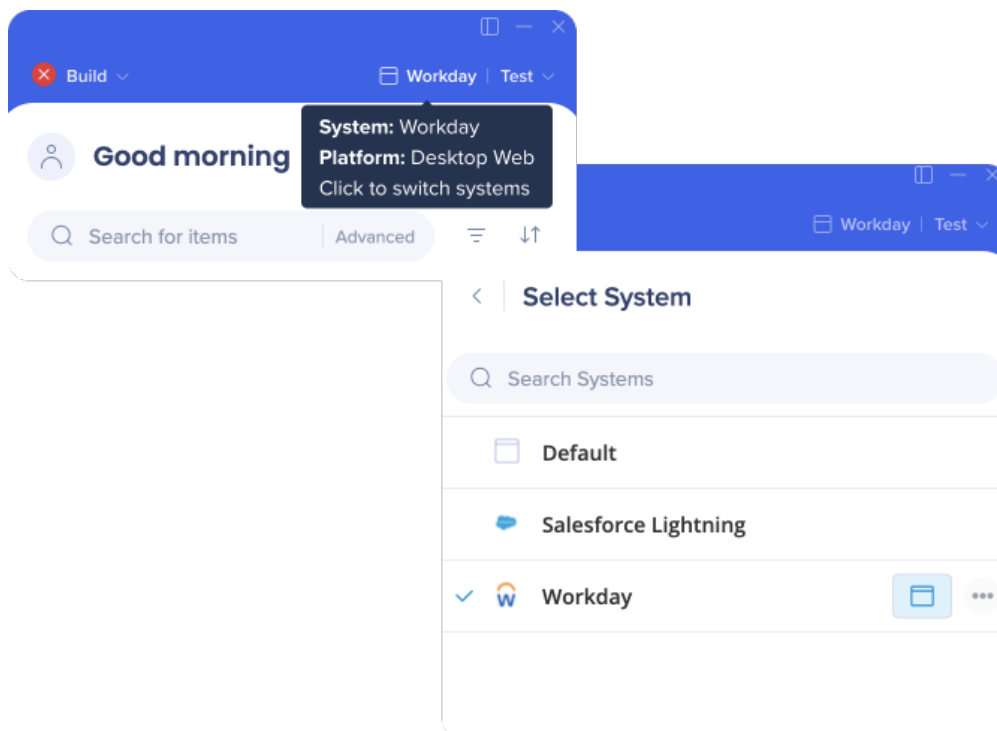
- The mode selector lets you toggle between Build mode and Play mode
- This way you can view and test published content without the need to switch between different browser profiles



[How to Use Build and Play Mode Selector](#)

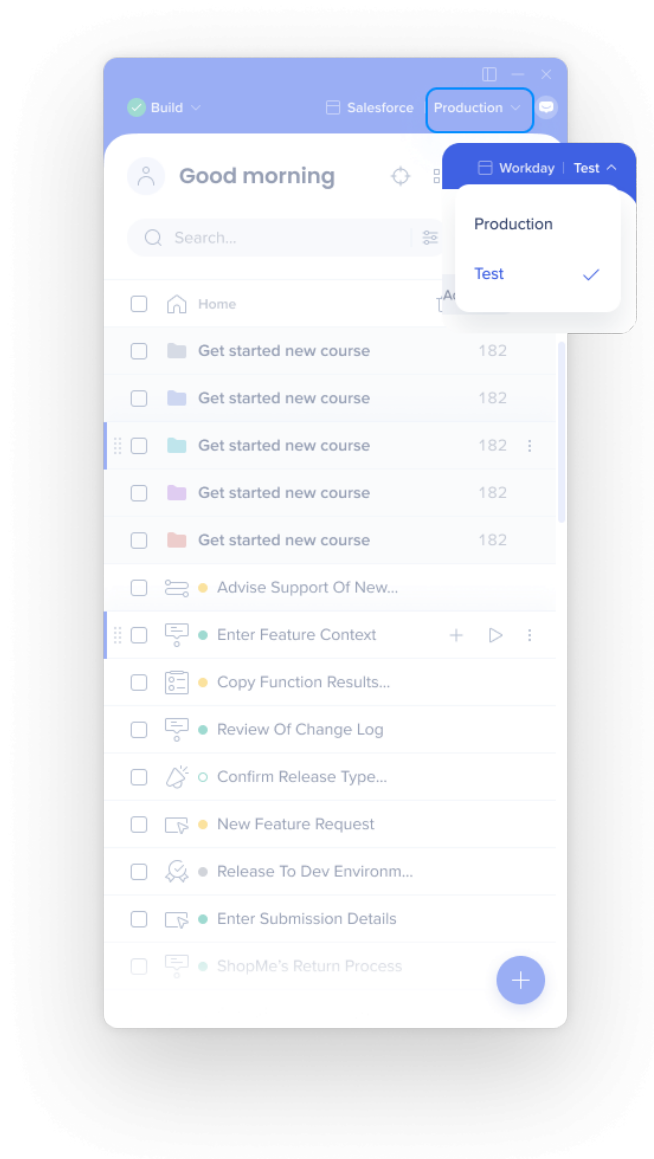
System Selection

- Before you begin building, it is important to make sure that you are working on the correct system associated with your account
- You can see the name of the system in the top right of the editor
 - **Note:** If the system name is too long, hover over it to view the full name
- To switch between systems, simply click on the name of the system in the editor and then choose the system you want to work on from the **Select System** screen



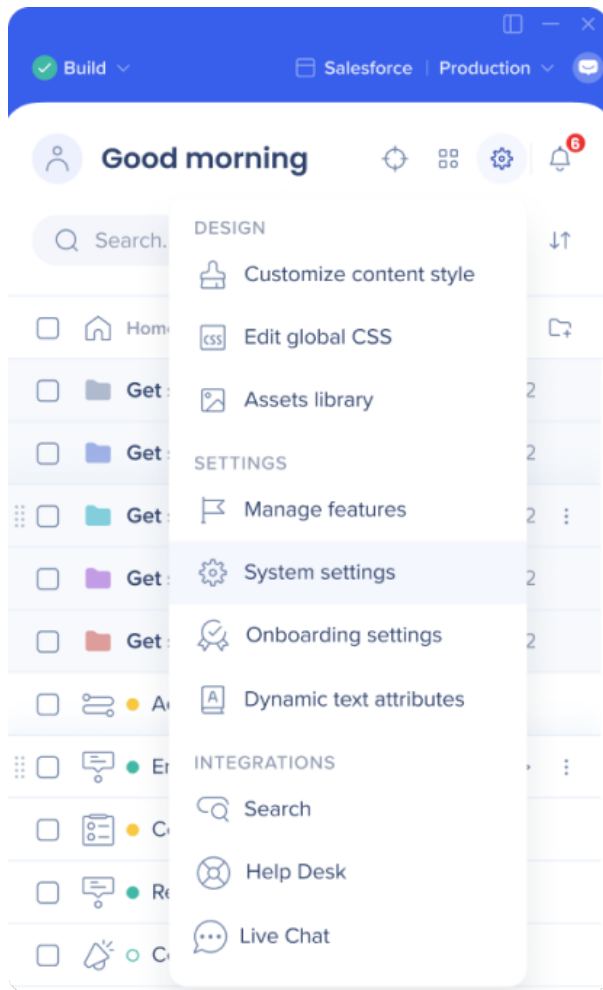
Environment Selection

- All content that was created is viewable in the editor, but items may have different publish states across different environments
- For example, a content item may be published in the test environment for QA testing, but still in draft mode in the production environment
- The state of each item can be viewed in each of the environments
- To switch between environments, click on the environment dropdown in the upper right corner of the editor and select the environment you want to view



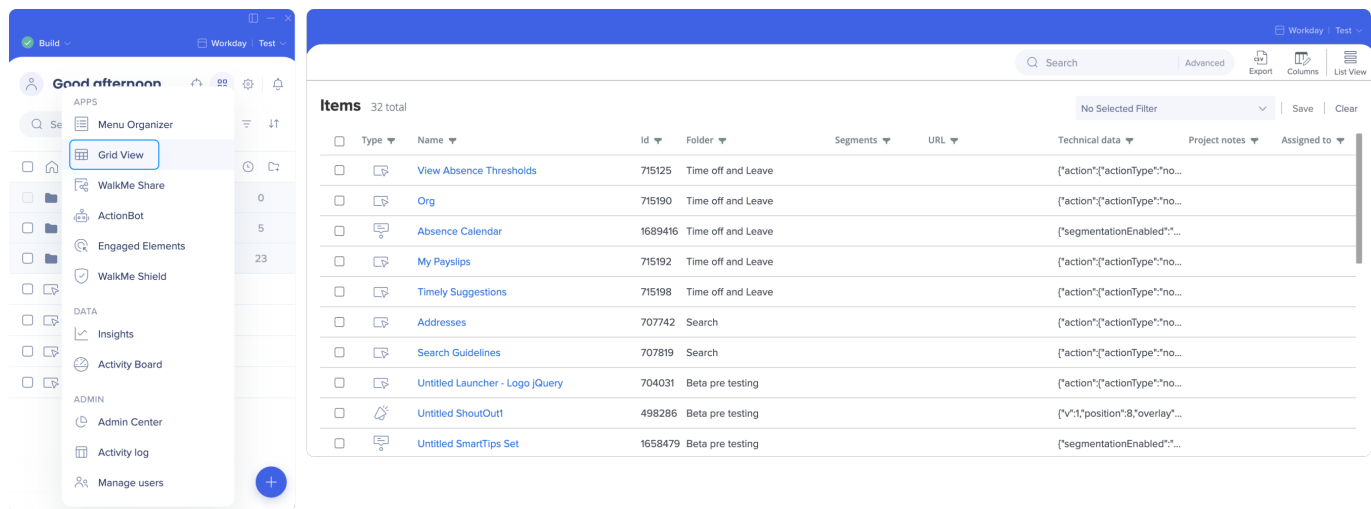
Settings

- The editor holds many important settings for WalkMe functionality, such as unique user settings, attributes, flow tracker settings, customization, and more
- You can access settings by clicking on the **Gear** icon



Grid View

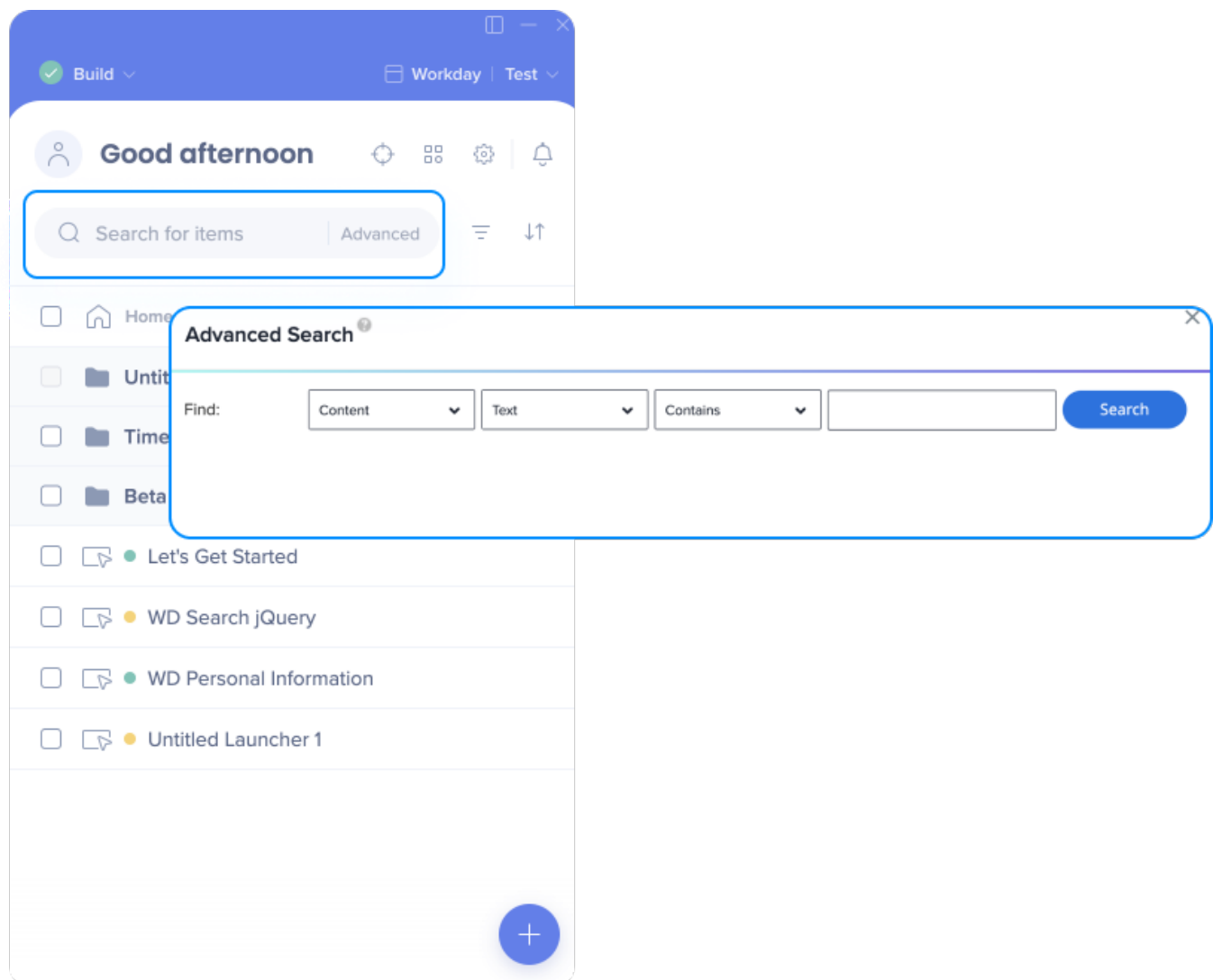
- Grid view offers a detailed UI layout for builder and content moderators with search and filter capabilities and a unified navigation experience
- Switch from list to grid view by clicking on the **Apps** icon



[Editor Grid View](#)

Search

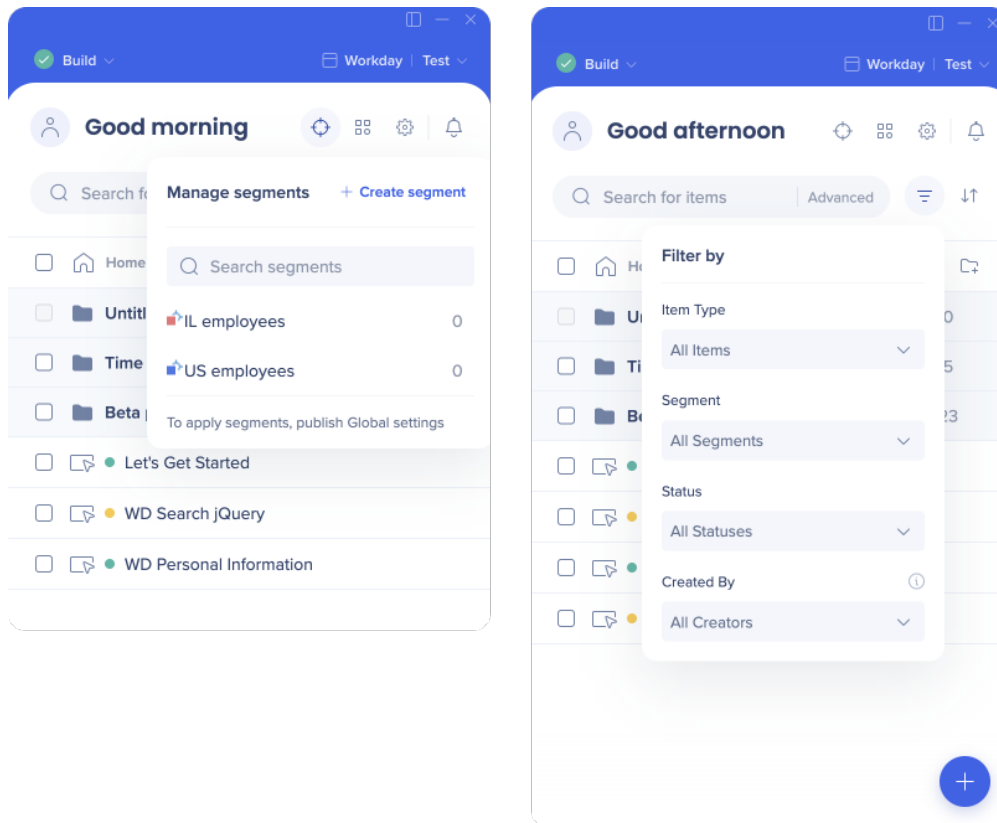
- Use search to quickly locate your items
- Advanced search allows you to locate, update, and maintain Element Selections within a WalkMe implementation by Id, class, text, URL, and more



[WalkMe Advanced Search](#)

Segments and Filters

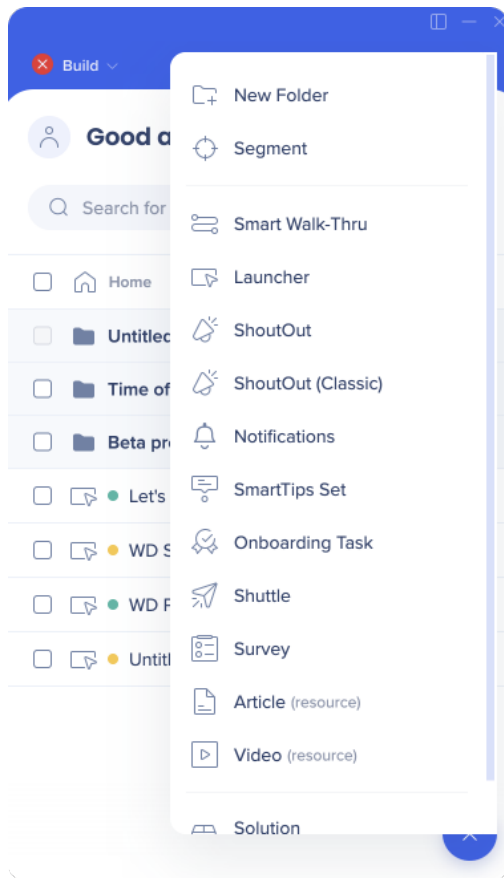
- Create segments and filters for better organization and to manage the building experience
- Click on the **Segment** icon to manage existing segments and use the **+ Create Segment** button to create new ones
- The **Filter** icon lets you filter content by item type, segments, status, and creator



[Editor Segments & Filters](#)

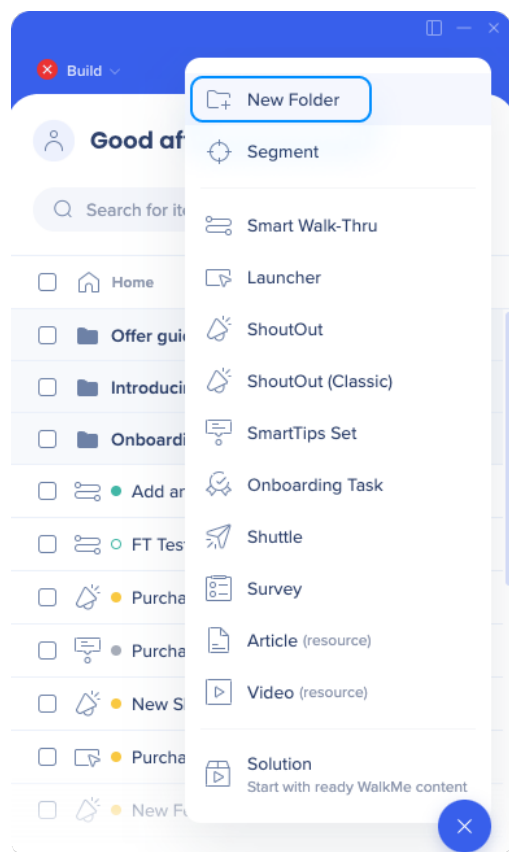
Create New Item

- Click on the **Blue +** icon to create a new item



Create New Folder

- Click on the **+ New Folder** button to create a new folder



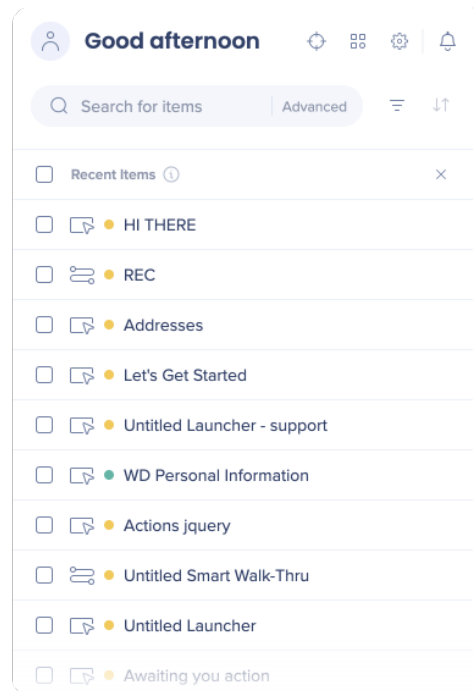
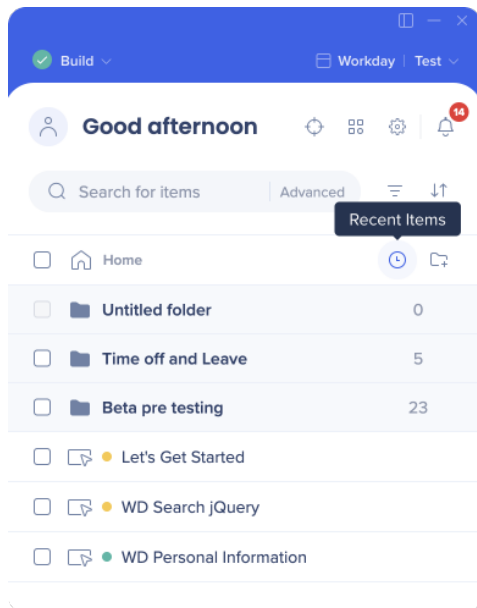
[Editor Folders & Recent Items](#)

Recovering deleted content

If you need to restore a deleted Smart Walk-Thru, Launcher, or other item, please reach out to Support.

Show Recent Items

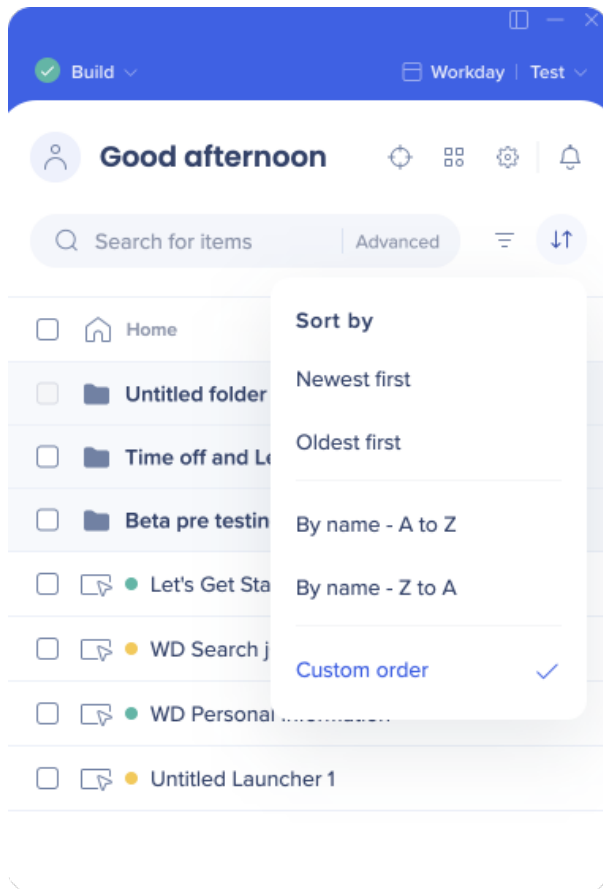
- Click on the **Clock** icon to see items you've recently worked on



[Editor Folders & Recent Items](#)

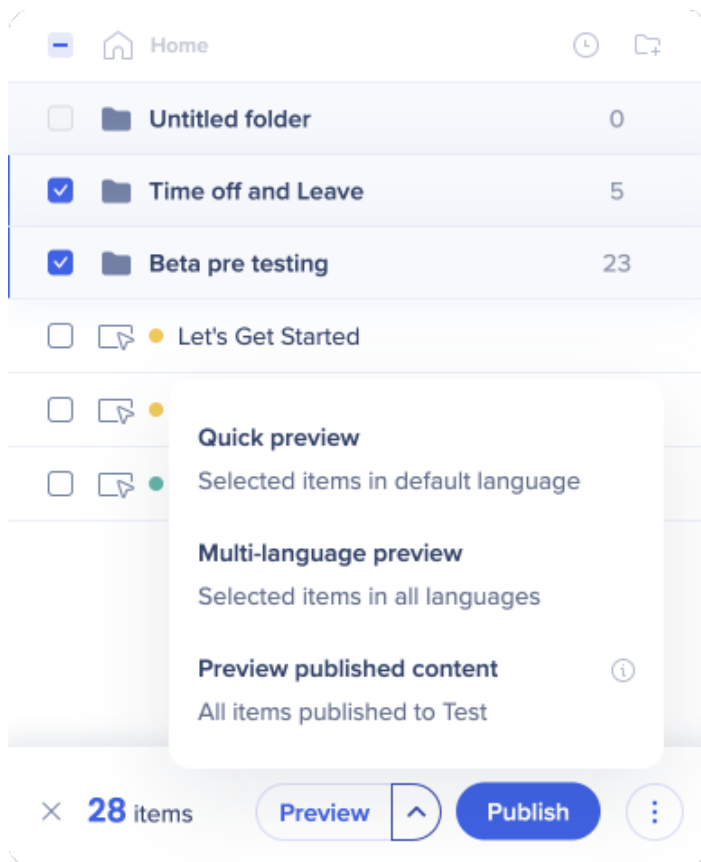
Sort

- Click on the **Arrows** icon to sort your items by name or by creation date
- Custom order organizes according to the user preference
 - **Tip:** You can drag and drop to reorganize your items



Preview

- Preview the selected items to see how they're working
- There are three preview options available:
 - **Quick preview:** View all items in default language
 - **Multi-language preview:** View all items in all languages
 - **Published content only:** View content that was published to Test



[Previewing WalkMe Content](#)

[Publishing](#)

Notifications

- Click on the **Bell** icon to review your new recommendations available or to review a new message from the [WalkMe Assistant](#) team

