

SmartTips: Getting Started Guide

Brief Overview

SmartTips provide on-screen guidance that can be used to give users additional information about specific items on your page.

SmartTips are especially useful when addressing processes or forms on your site where users often make mistakes.

For more information on SmartTips, view the [SmartTips Introduction page](#).

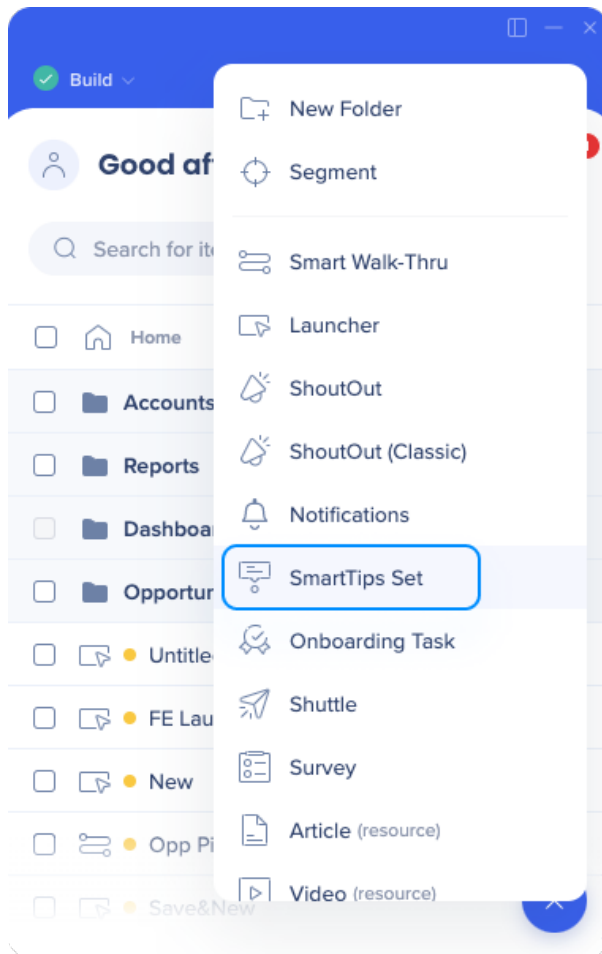
Individual SmartTips are created within a Set — a group of SmartTips that generally appear on the same form or page. This article will guide you through the process of creating a SmartTips Set.

□ Digital Adoption Institute

- View the [SmartTips 101](#) course in the DAI
- Don't have a DAI account yet? [Sign up here](#)

Create a SmartTips Set

1. From the **Editor**, click the **blue + icon**
2. Select **SmartTips Set**



3. Name the SmartTips set

- **Tip:** The title will not be visible to your users, so choose a name that will be useful for you in identifying the set in the future

 A screenshot of a dialog box titled 'Create a new SmartTips Set'. It contains a text input field with the placeholder text 'Untitled SmartTips Set'. Below the input field are two buttons: 'Cancel' and 'OK'.

4. Define where you want the set to display:

- Display set on a specific page | **Recommended**
 - SmartTips are normally added to a single page, like a check out form. In which case, it's best to use the rule engine to define the page to optimize performance
 - Click **Create rule to identify page** and follow these [rule engine guidelines](#)

Note

Set settings rules are only evaluated upon page load.

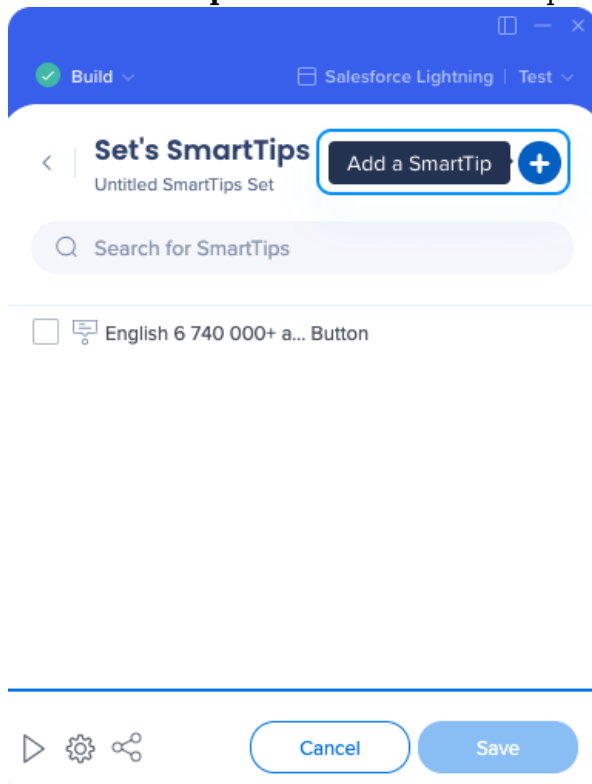
- Display set on multiple pages
 - If your SmartTip is attached to an element that appears throughout your site (header, footer, navigation pane) then select this method
 - You do not need to use the rule engine here

5. Click **Save**

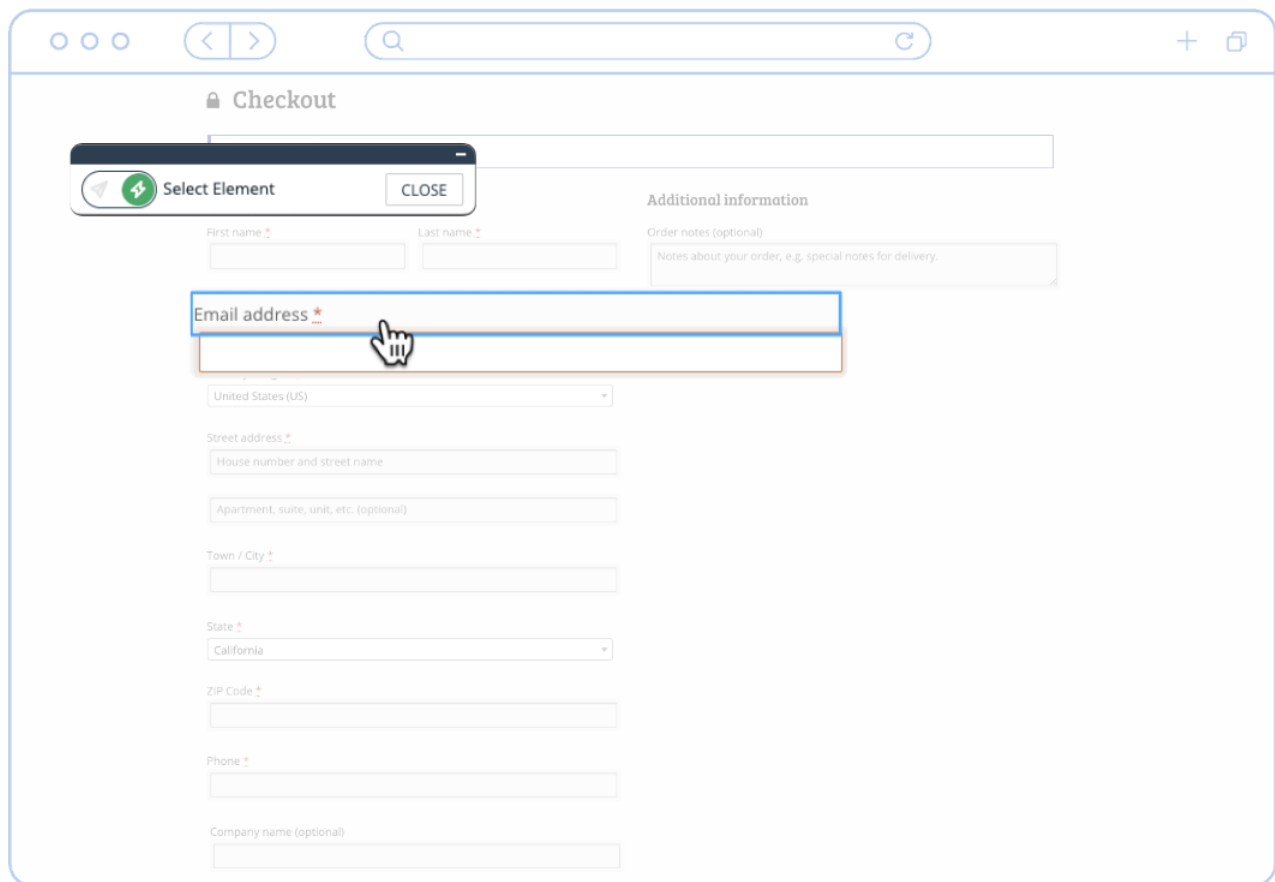
Create SmartTips

Now that you have created a SmartTips Set, you will create an individual SmartTip.

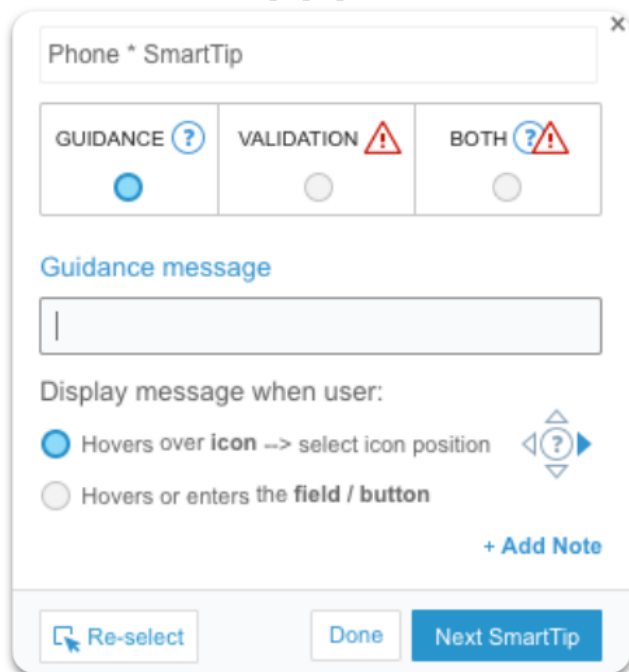
1. Click the **blue plus icon** in the SmartTips set to add a new SmartTip



2. Select the **element** that you want to attach the SmartTip to



3. Use the mini-editor popup to define the SmartTip's initial settings



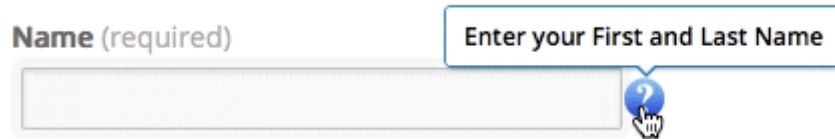
- **Guidance SmartTips** give users additional information about specific elements on a

page

- This is the most commonly used SmartTip type.
- **Validation SmartTips** can be used in text fields to ensure that users fill out their forms correctly
 - For more information on Validation SmartTips, view the [Validation SmartTips support article](#)

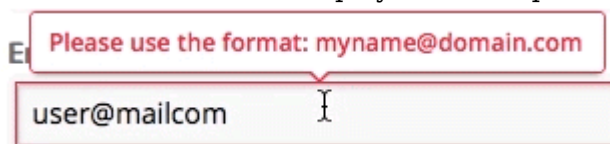
4. Choose when to display this message.

- You can set this SmartTip guidance to appear when the user hovers over a SmartTip icon
- If you choose this option, use the directional arrows to determine where the icon will be



positioned

- You can also choose to display a SmartTip when a user hovers over an element



5. Click **Done**

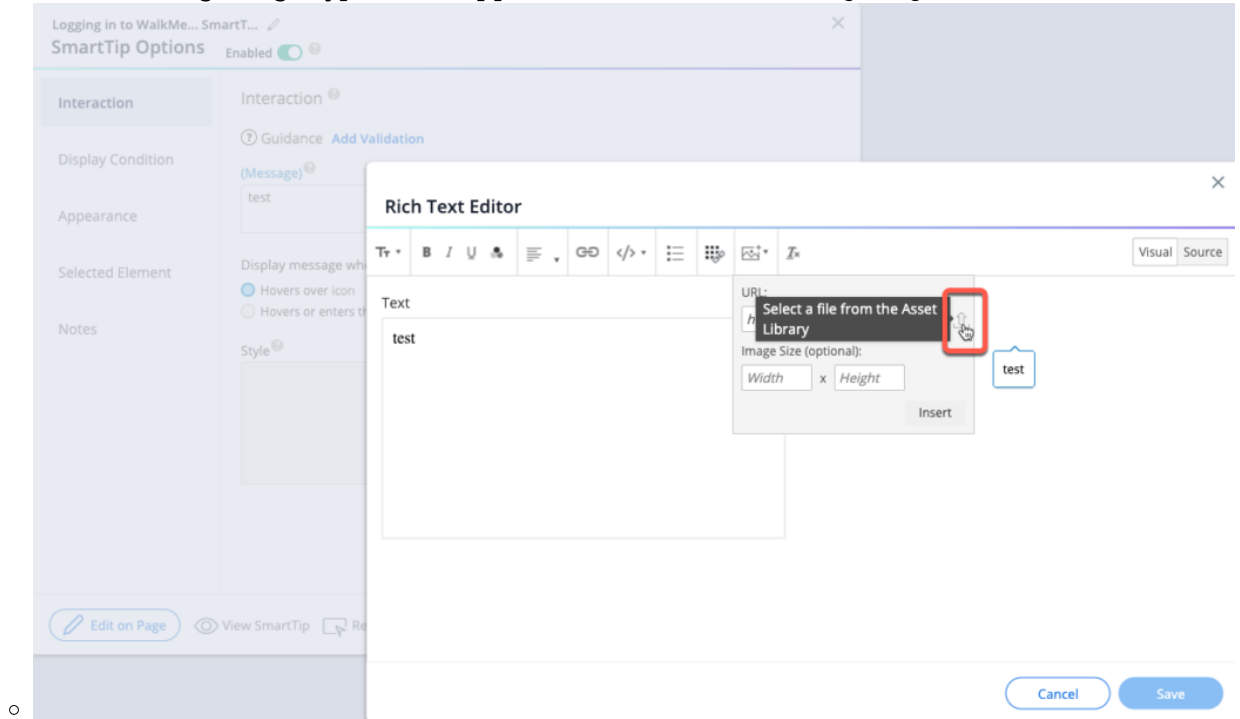
Your SmartTips Set is now created!

If you are creating multiple SmartTips, you can select **Next SmartTip** instead.

Customize SmartTips

1. Open the SmartTips Set that you want to customize, and open a specific SmartTip by clicking on the title
2. On the interactions page, you can adjust the SmartTips settings that were created when you initially created the SmartTip in the browser
 - To add Validation to a Guidance SmartTip, click the **Add Validation** button
 - [See the Validation SmartTips guide for more information on how to set up Validation SmartTips](#)
 - You can also choose here to determine whether to display the SmartTips message when the user hovers over the SmartTips icon or hovers over the element
3. Click the Selected Element options to adjust the SmartTip's behavior
 - If the SmartTip is attached to an element that appears and disappears as a result of page load, you will need to adjust these settings
 - This is often necessary for SmartTips that appear in a popup window or a modal
4. Use the **Customize on Screen!** button to adjust the appearance and position of this SmartTip in the browser

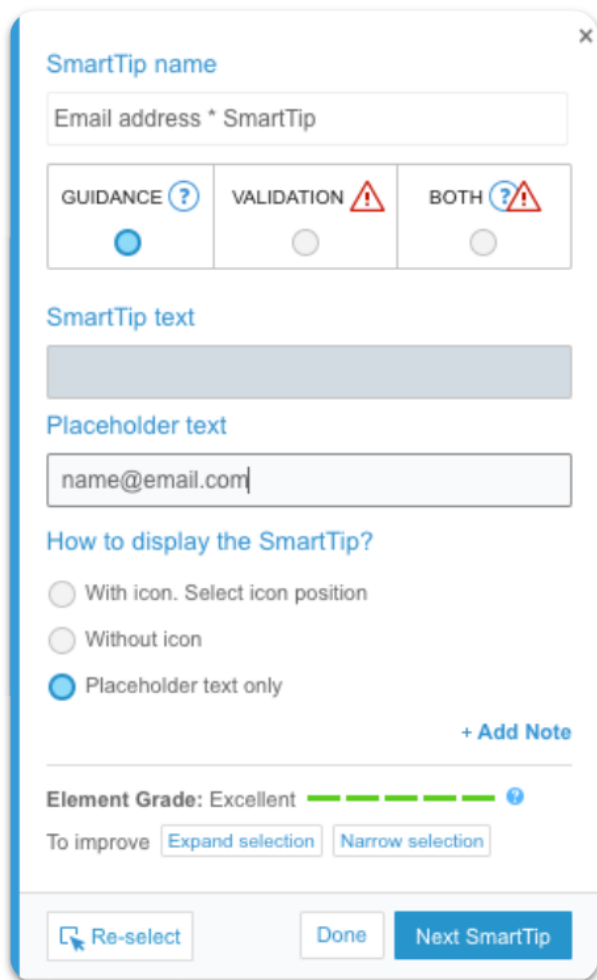
5. Use the Rich Text Editor to make additional customizations, including adding images that have been upload to the Assets Library
 - The following image types are supported - TIFF, SVG, PNG, JPG, JPEG, GIF



Guidance SmartTips





Guidance SmartTips present users with additional information on the content and the format of the data that should be entered in the input field.

Guidance SmartTips can be displayed in an icon and the messages appear when you hover over the icon or click on the element or in placeholder text, which is always visible until the user types in the field with the placeholder.



SmartTip name

Email address * SmartTip

☒ GUIDANCE 
☐ VALIDATION 
☐ BOTH  

SmartTip text



Placeholder text

name@email.com

How to display the SmartTip?

☐ With icon. Select icon position
☐ Without icon
☒ Placeholder text only

+ Add Note

Element Grade: Excellent  

To improve [Expand selection](#) [Narrow selection](#)

[Re-select](#)
[Done](#)
[Next SmartTip](#)

How to display the SmartTip?

- **With icon. Select icon position:** When this option is selected, the guidance icon will appear next to the element and the message displays when the user hovers over it
- **Without icon:** When this option is selected, the message will appear when the user hovers over the element
- **Placeholder text only:** When this option is selected, no icon will display, only the placeholder text

Placeholder text

Placeholder text, located inside a text field, is an additional hint, description, or example of the information required for a particular field. It disappears when a user starts typing in the field.

You can have both a placeholder and a message on hover.

The placeholder text option is only available for Guidance SmartTips. It's not available if Validation

or Both is selected.

The captured element must be an input field for placeholder text to be supported. Placeholder text can also be used if the element is defined with jQuery.

Note

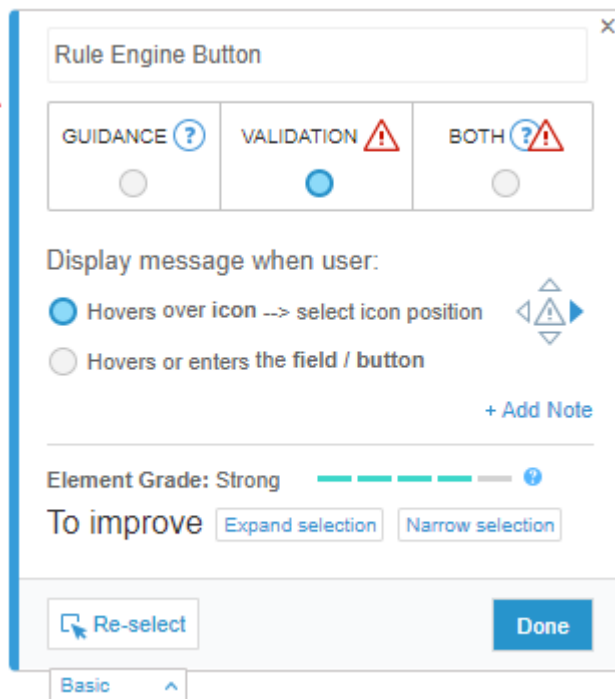
SmartTip placeholder text will replace any existing placeholders.



Validation SmartTips

Validation SmartTips allow you to check your users' input on a text field to ensure that the information given meets the requirements of the field. The Validation SmartTip will highlight the field in red and display an error if the information given is invalid. Validation SmartTips must be placed on a text field.

1. To create a validation SmartTip, you can **add a SmartTip to an existing SmartTips Set** or you can **create a new SmartTips Set**.
Note: You can add Validation to an existing Guidance SmartTip by clicking the **Add Validation** button in the Interaction tab of the SmartTip options.
2. In the appropriate SmartTips Set, click the orange plus sign.
3. Click the Validation radio button to make this SmartTip a Validation SmartTip:



The screenshot shows a configuration window for a SmartTip. At the top, there's a title bar with a close button (X) and the text "Rule Engine Button". Below this is a row of three radio buttons: "GUIDANCE" (with a question mark icon), "VALIDATION" (with a red warning triangle icon and selected), and "BOTH" (with both question mark and warning triangle icons). Underneath, there's a section "Display message when user:" with two radio buttons: "Hovers over icon --> select icon position" (selected) and "Hovers or enters the field / button". To the right of these is a small icon of a warning triangle with a plus sign. Below this is a "+ Add Note" link. Further down, there's a section "Element Grade: Strong" with a progress bar and a question mark icon. Below that is the text "To improve" followed by two buttons: "Expand selection" and "Narrow selection". At the bottom, there are two buttons: "Re-select" (with a cursor icon) and "Done". At the very bottom, there's a "Basic" button with an upward arrow.

4. Choose when to display the validation message, then click Done. This will open the SmartTip Options page in the Editor.
5. Choose from the available options for validation rules (if none of these are applicable, you can **Define valid entries** using the Rule Engine):
 1. Mandatory field
 2. Numeric field validation
 3. Date format validation
 4. Time format validation
 5. US Phone number format validation
 6. Email address format validation
 7. Web address format validation

6. Enter the Error message that you want to display when the text entered is invalid.
7. Optionally, you can check the box for Success indication, which will highlight the text field green once the text entered is valid. You can also include a success message to be displayed once the information entered is correct.

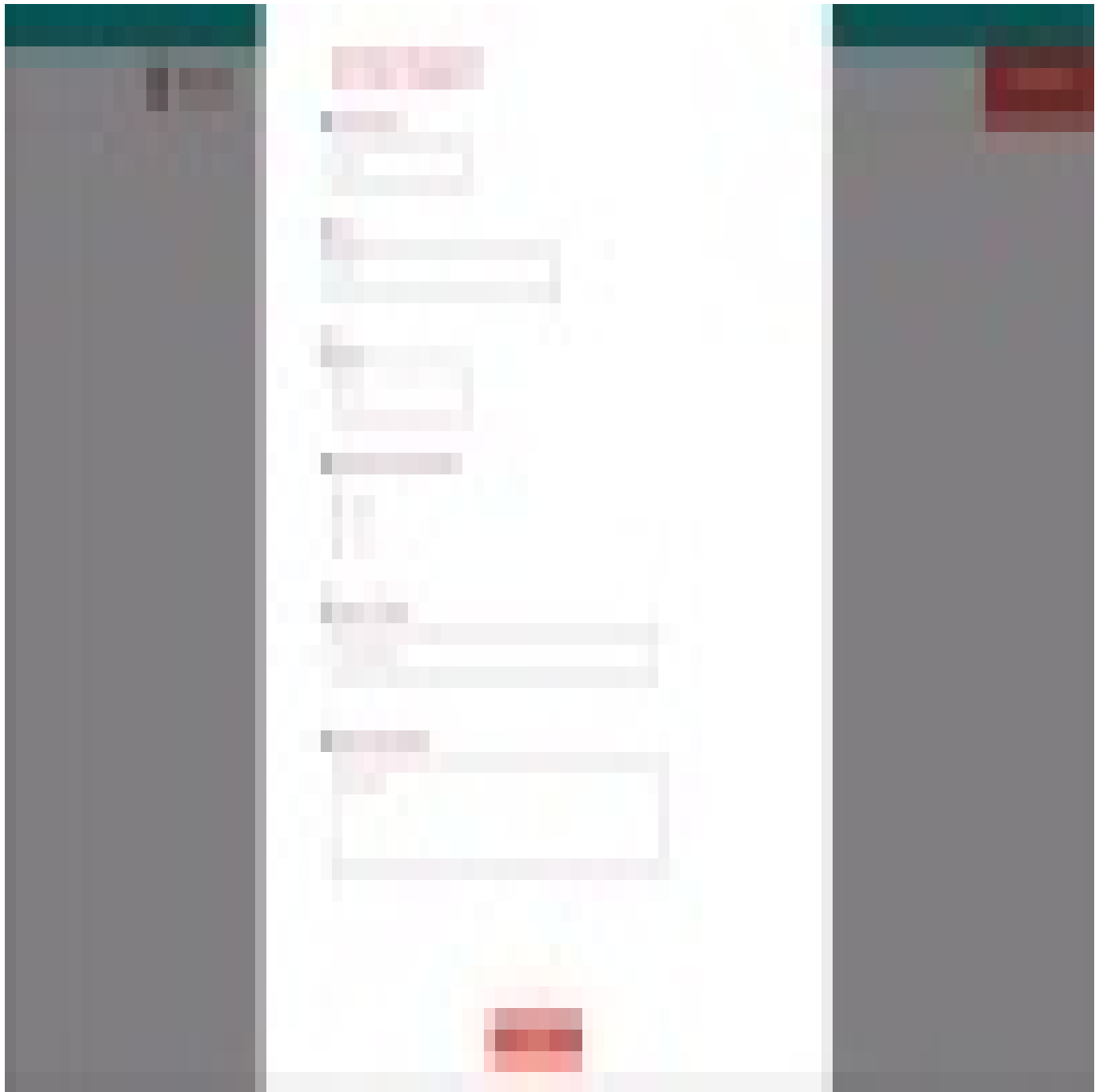
Tip Tuesday Videos

Check out [other videos](#) to learn more tips and tricks.

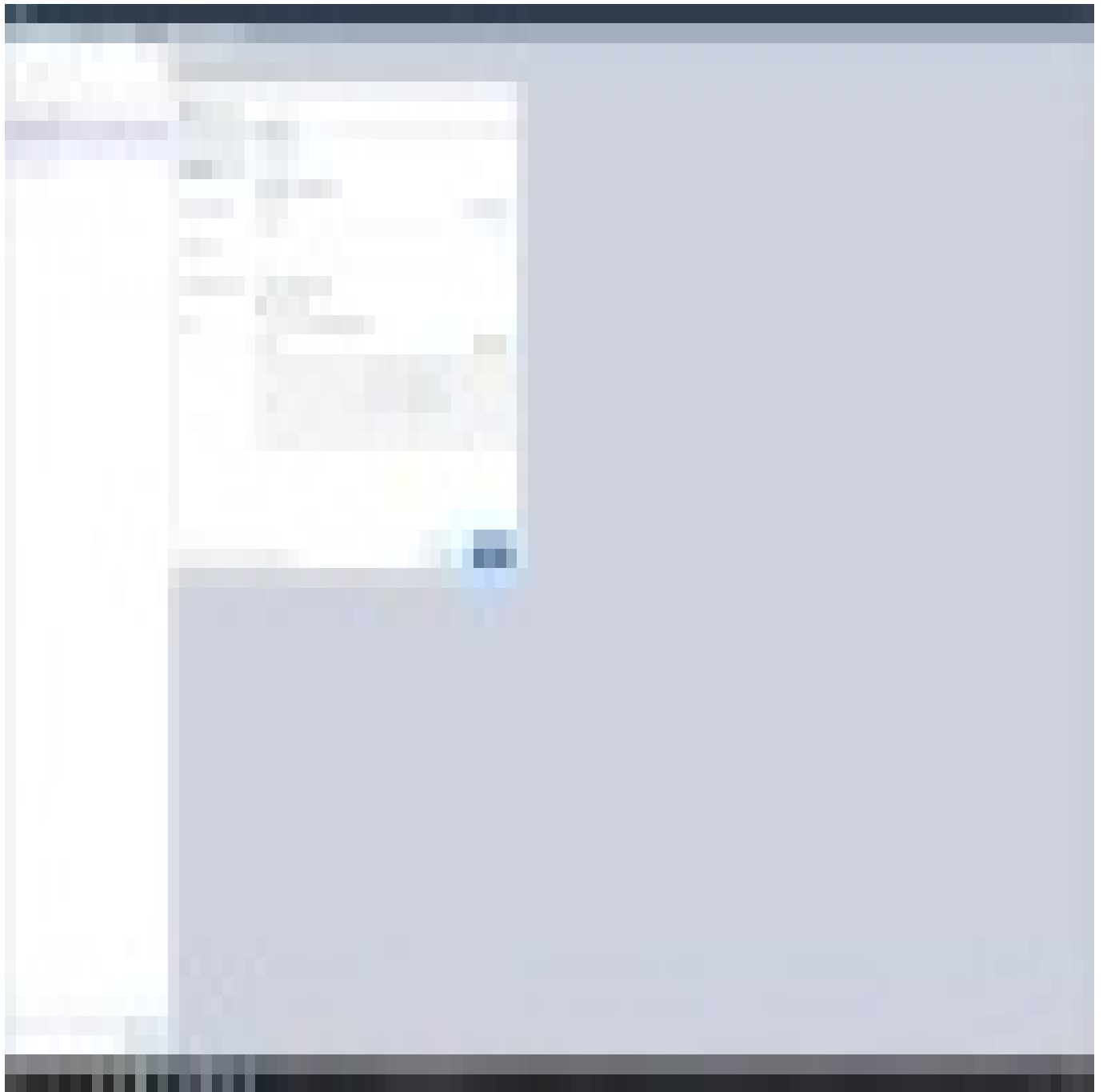
Quick Guide to Placeholder SmartTips



Smart WalkThrus vs SmartTips

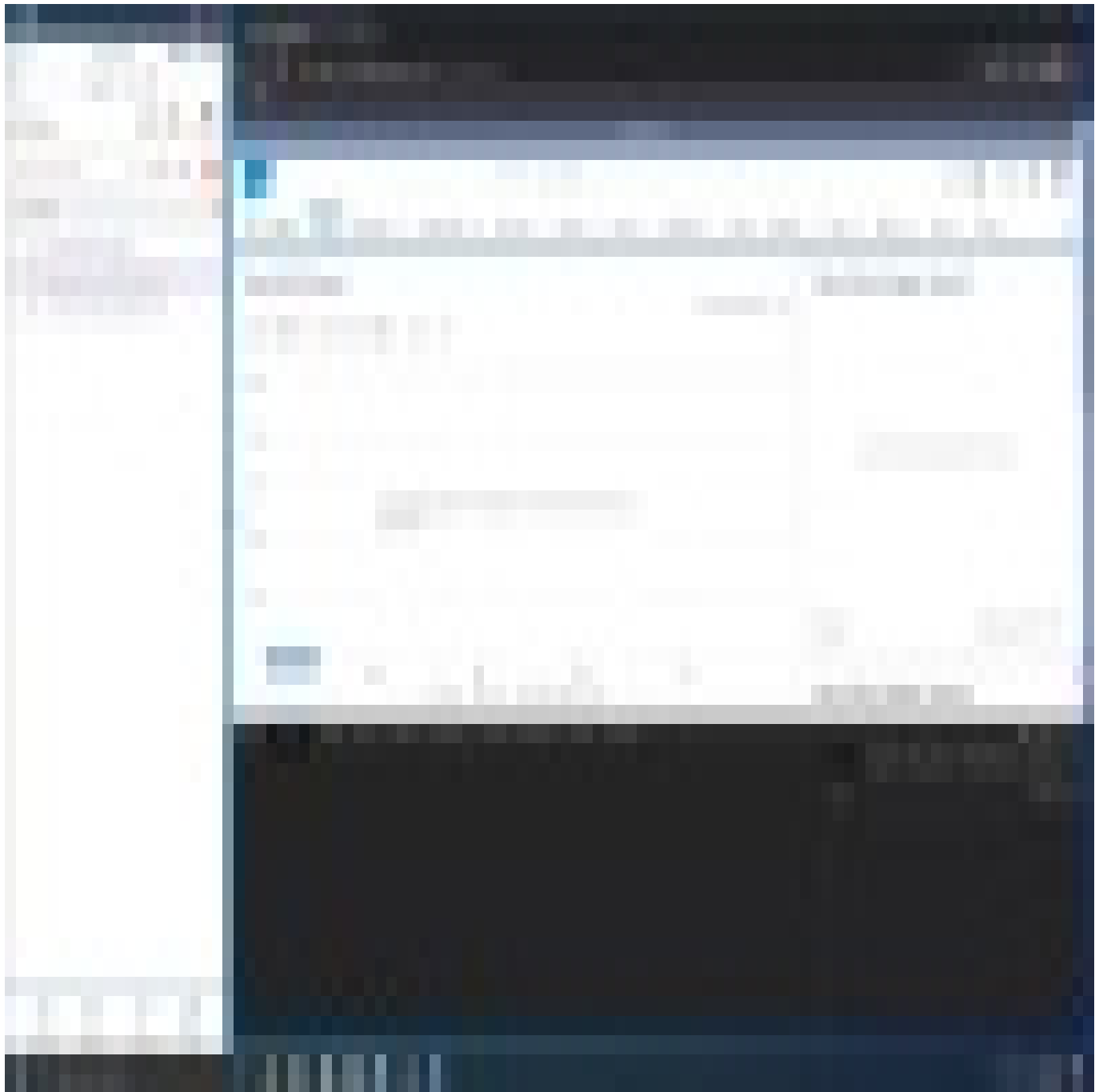


How to Make Fields Appear Mandatory





Building Tips for Responsive Websites

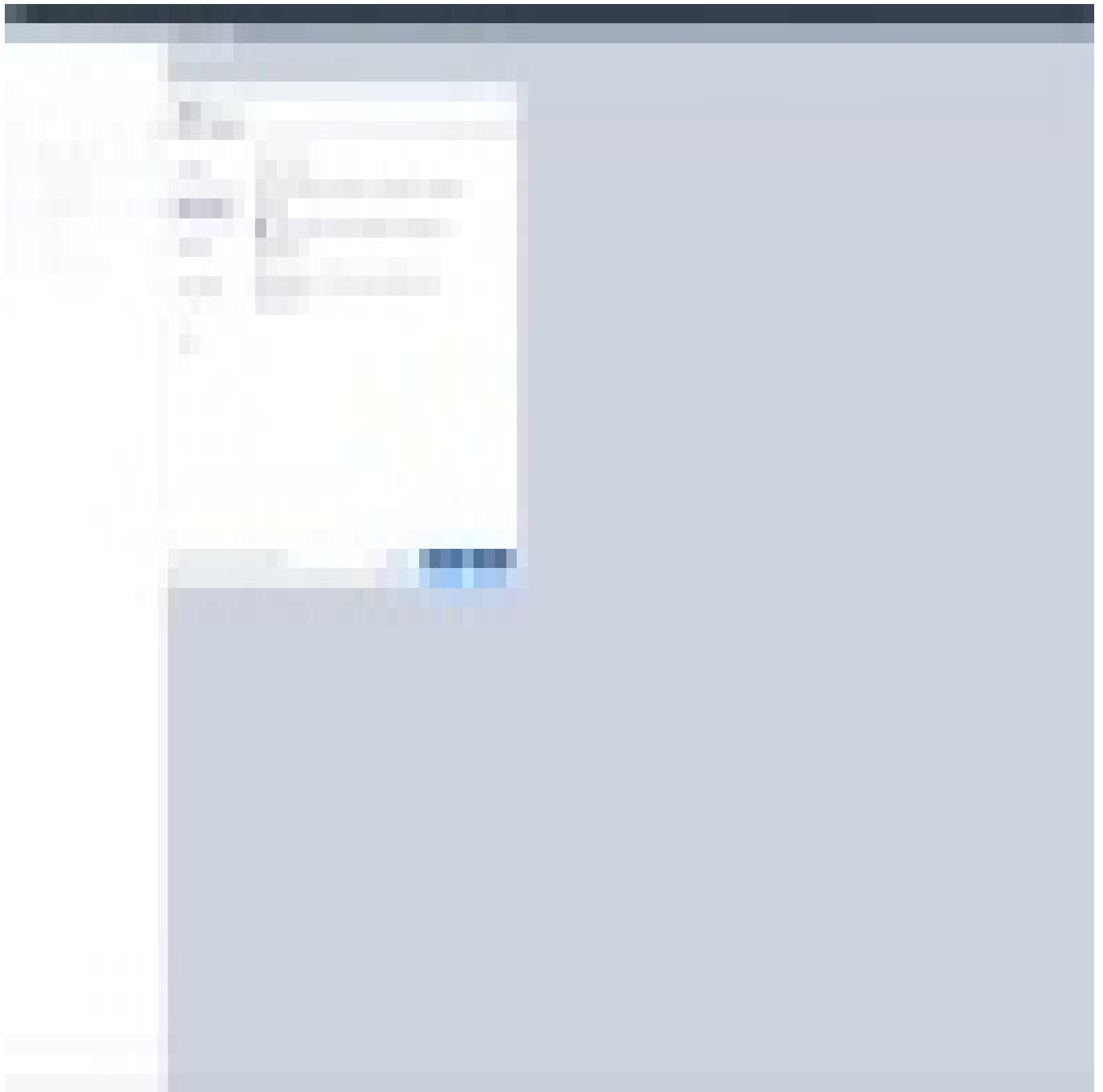


How to Block User Submission With SmartTip Validations

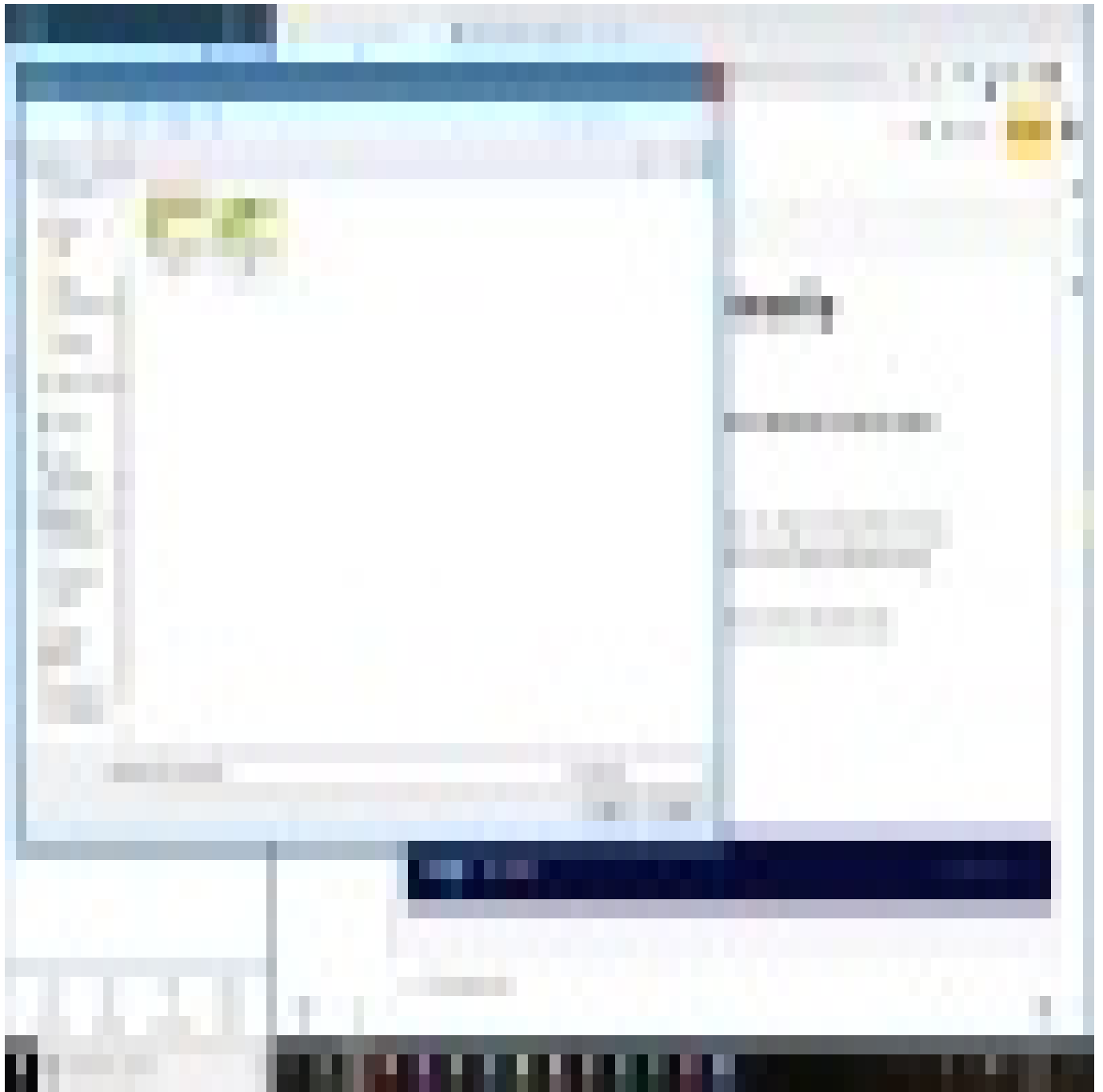




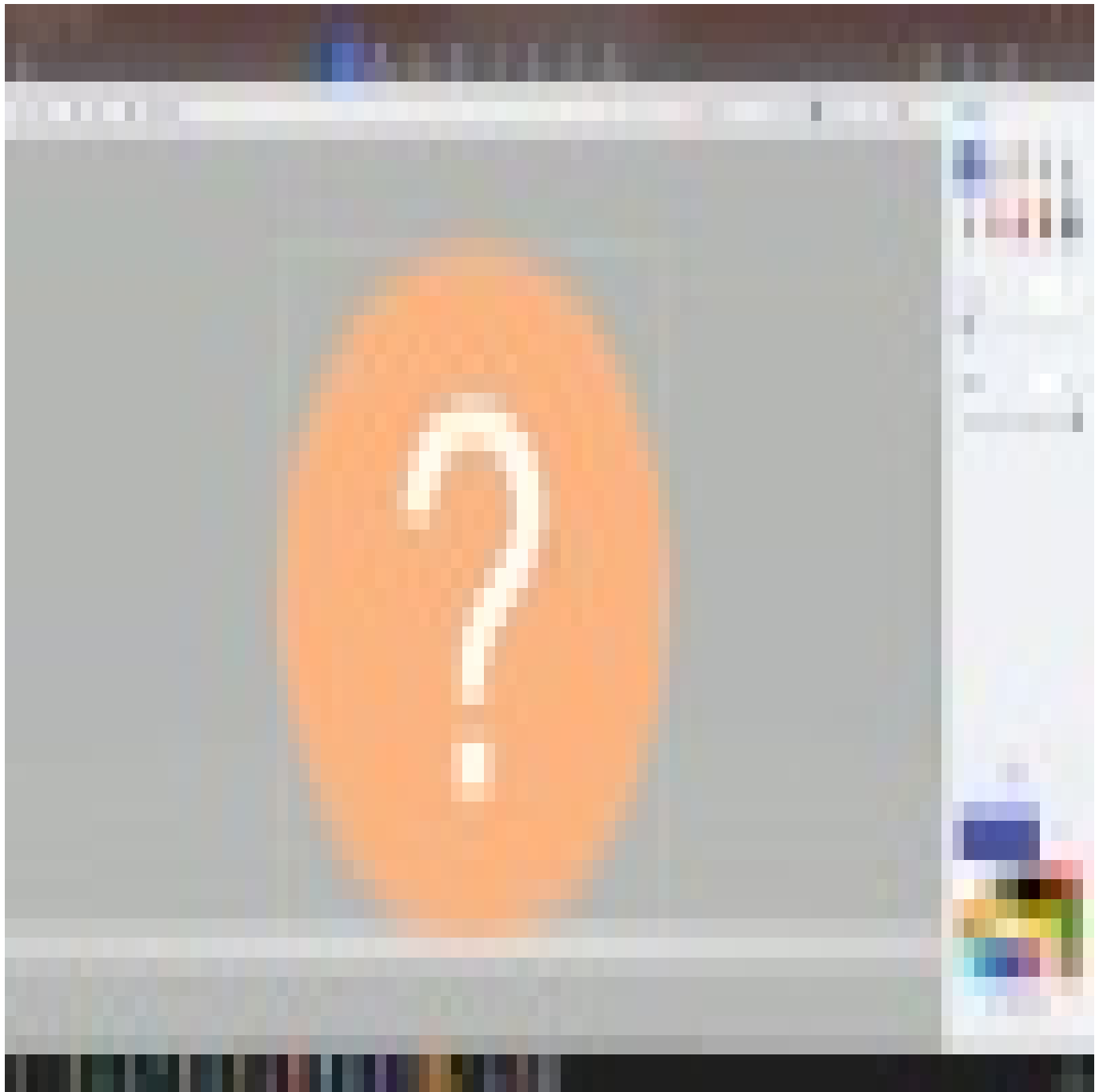
How to Turn SmartTips On and Off With WalkMe Data



How to Add Gifts to SmartTips



How to Create a Custom SmartTip Icon to Match Your Website

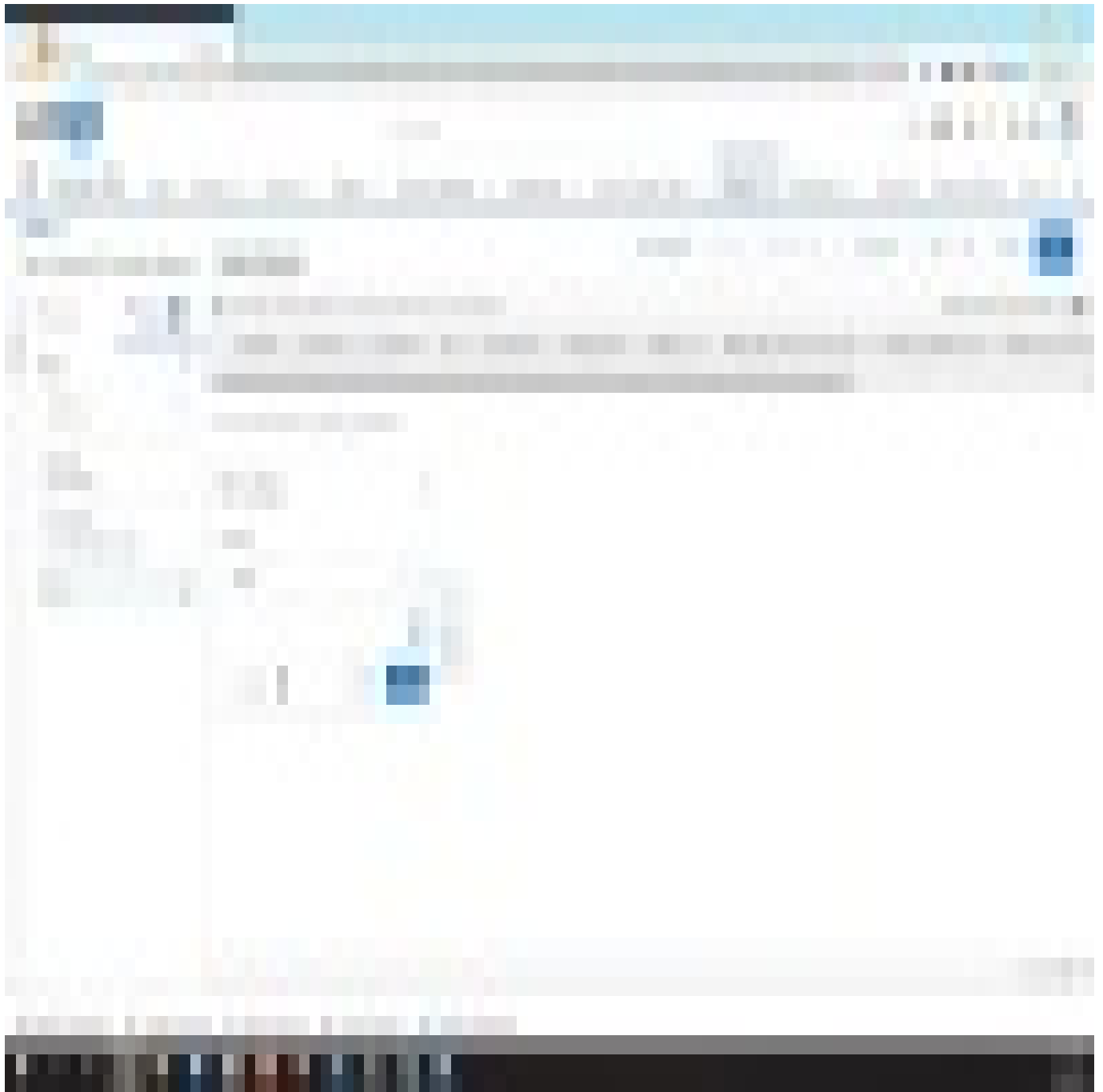


How to QA a SmartTip





Create Field Dependencies with WalkMe (Pick Lists)



How To Add a SmartTip Inside a Smart Walk-Thru Balloon

