

How To Organize the Player Menu

Brief Overview

You can customize the Player Menu your end-users will see when WalkMe loads on your website/application.

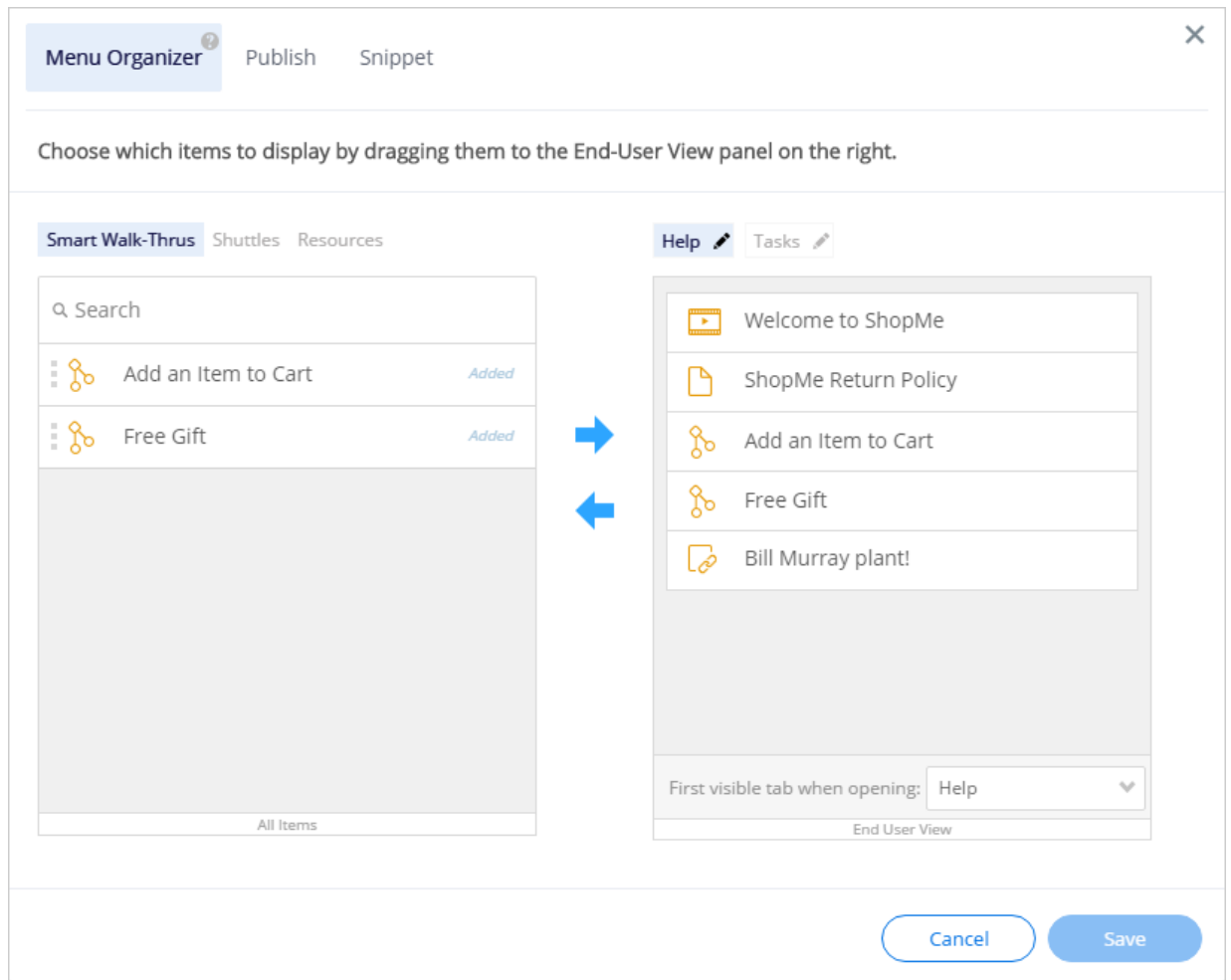
How Does it Work?

You can organize your items through the Menu Organizer in the WalkMe Editor.

- Click the Publish icon in the Admin Bar



- In the Menu Organizer tab, drag items from the left column to the right column



- In the left column, drag and drop items into the order you'd like them to be displayed.

From the Menu Organizer in the WalkMe Editor, you can also organize your Onboarding Tasks.

- Click the Tasks button above the right column to access your task list.
- Then, in the left column, drag and drop items into the order you'd like them to be displayed.
- You can further customize the menu by determining which tab (Help or Tasks) will appear by default when opening the menu. Use the Drop Down in the left column to determine which tab will open by default. Both tabs will always be accessible.
 - If "Tasks" tab was chosen to be the default option, but all tasks were completed, the default tab when opening the menu will change to "Help" (if such a tab exists)

Note that even published items may not appear in the WalkMe Player Menu on every page

because of Segmentation Rules. If the Segment is false, the item will not appear in the Player Menu, but the order of all the other items will remain the same.

Edit your tab names

Another way to edit the content in the player menu is to edit the titles of the tabs themselves. If you have added Onboarding Tasks, users will see two tabs when they open the player menu. You can edit these names by clicking on the pencil icon next to the name of the tab you would like to change.

The screenshot shows the 'Menu Organizer' interface. At the top, it says 'Menu Organizer' and 'Snippet'. Below that, a instruction reads: 'Choose which items to display by dragging them to the End-User View panel on the right.' The interface is divided into two main panels. The left panel, titled 'All Items', has tabs for 'Smart Walk-Thrus', 'Walk-Thrus', 'Shuttles', and 'Resources'. It contains a search bar and a list of items: 'New Customer' and 'Add new account', both marked as 'Added'. The right panel, titled 'End User View', has tabs for 'Help' and 'Tasks'. It contains a list of items: 'New Customer' and 'Add new account'. Two blue arrows indicate the movement of items from the 'All Items' panel to the 'End User View' panel. At the bottom of the interface, there are three buttons: 'PUBLISH SETTINGS...', 'Cancel', and 'Save'.

Categories

Another way to organize items in the Menu is with the use of Categories. Categories allow you to create folders within the menu and place items within them.

Interested in adding categories (i.e. folders) into the Player Menu? This is an enabled featured, contact your Customer Success Manager to request this.



Contact support@walkme.com to enable this feature.