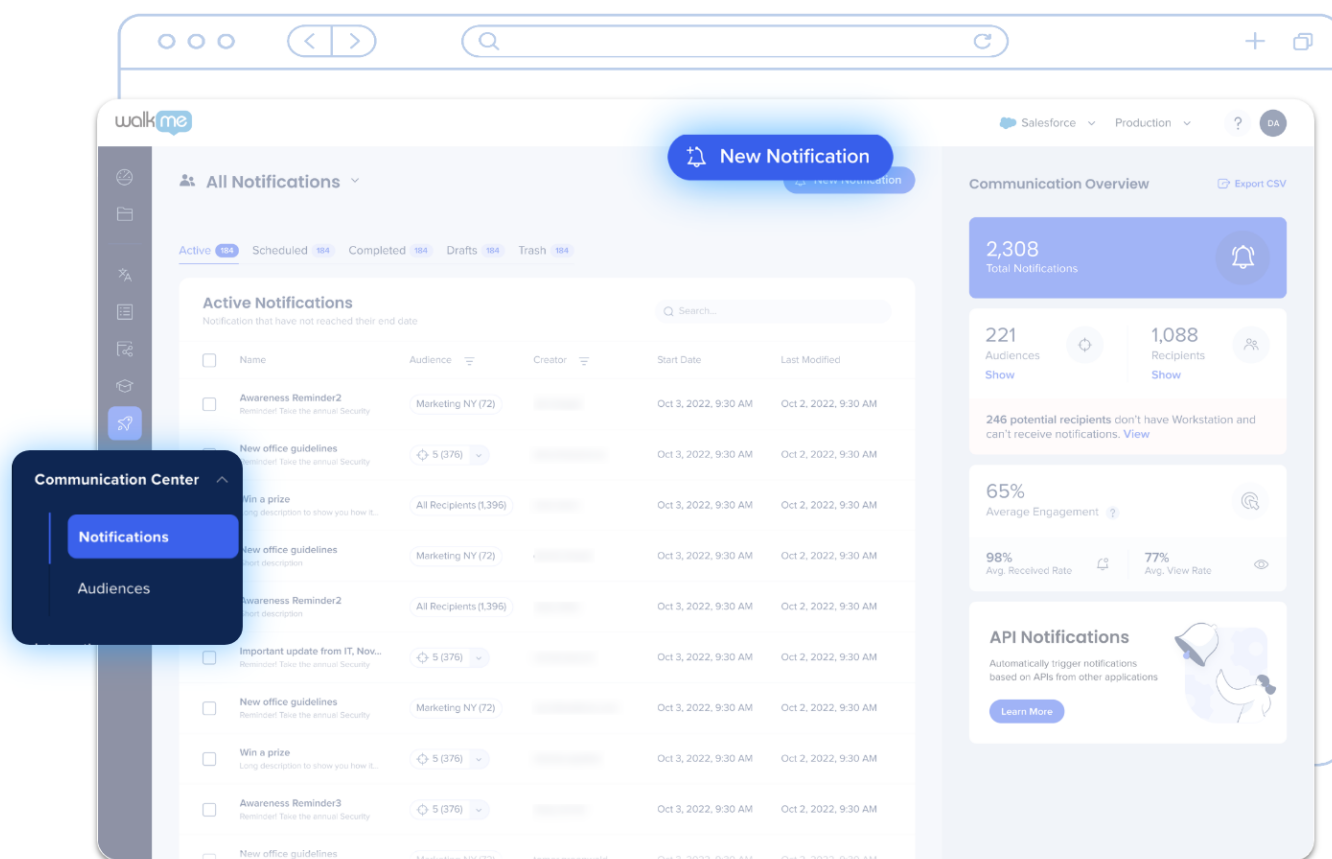


How to Create and Send a Notification

Brief Overview

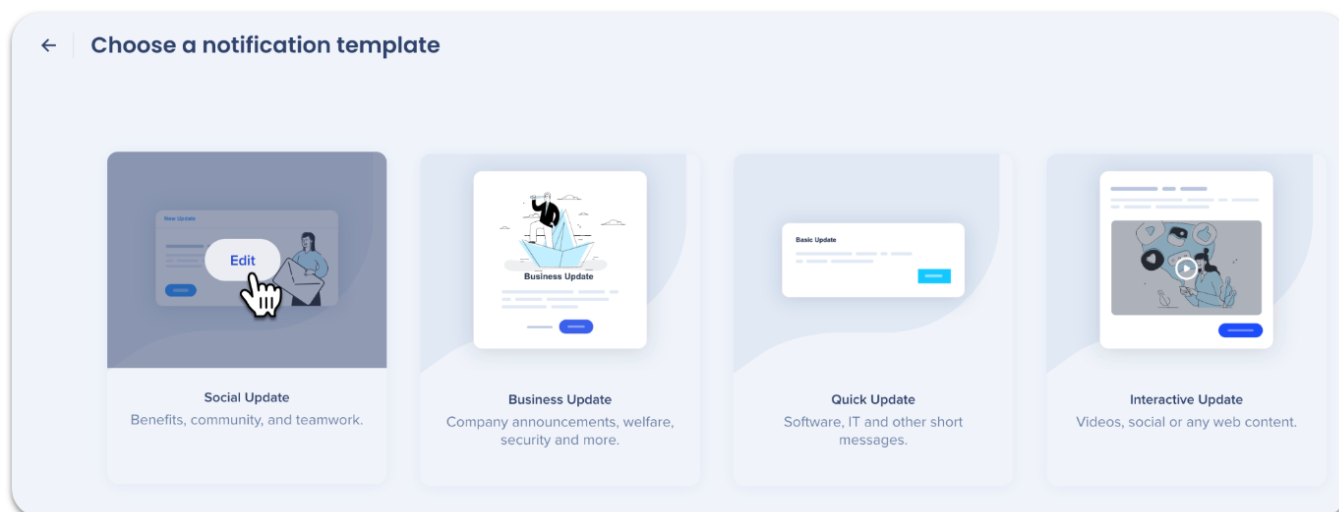
Now that you are familiar with the [WalkMe Communication Center](#), it is time to learn how to create a Notification. This comprehensive guide to the notification process, from creation to publishing! This guide will take you through everything you need to know to create notifications that grab attention and deliver results. So let's get started and make your communication strategy a success!



Create a Notification

Step 1: Select the Template

1. From the Communication Center, click **New Notification**.
2. Select a **template**.

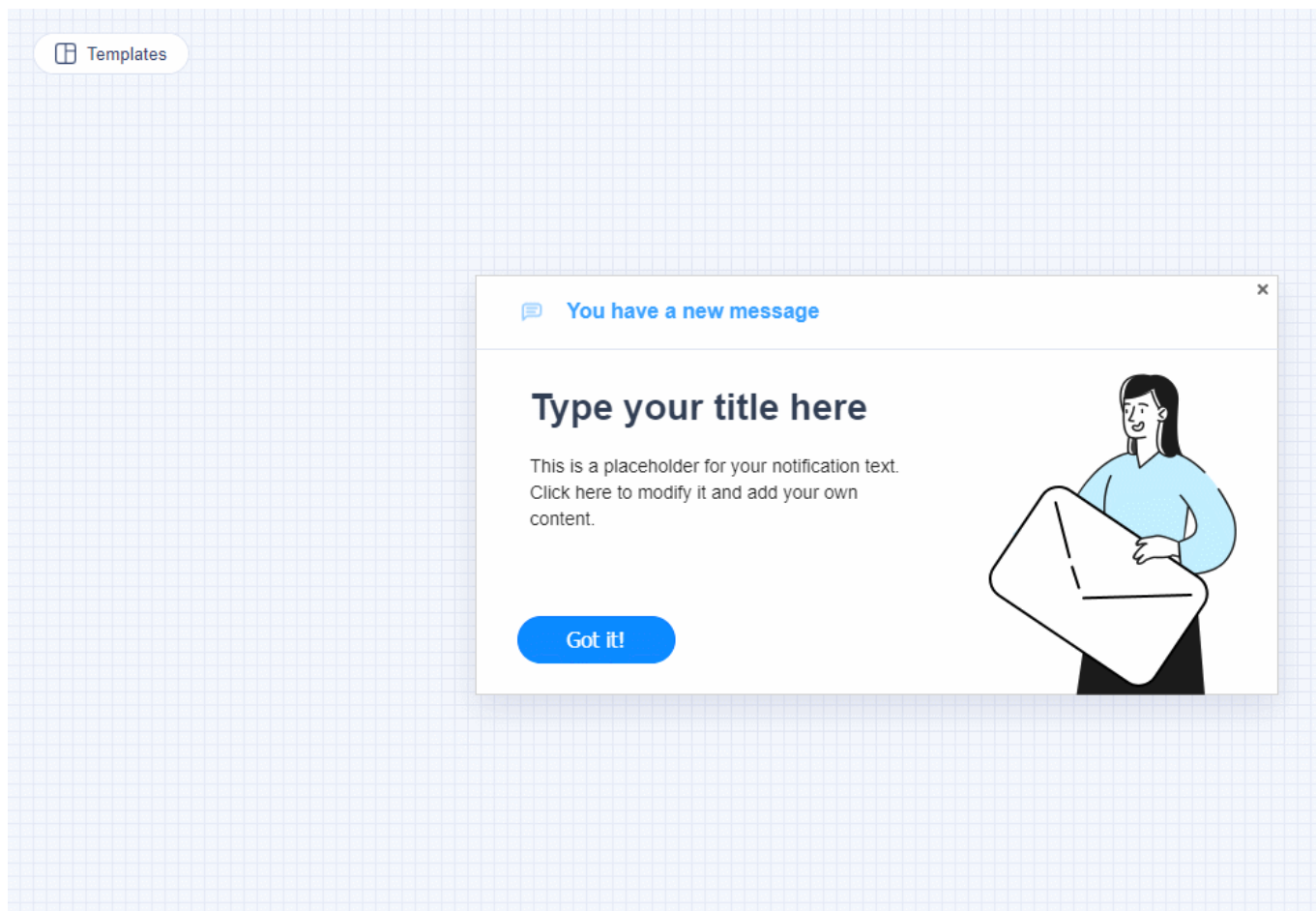


You can change the base template at any point by clicking **Template** in the designer. All text changes will be saved.

Note

The communication Center now supports the new [Visual Designer Dynamic Layout](#). All new notifications will be created with it. Existing custom templates will continue to utilize the previous version. However, this feature is currently not available for customers who have Workstation mobile.

- If you switch between templates, only the title + image will move. Additional objects added will not be moved.

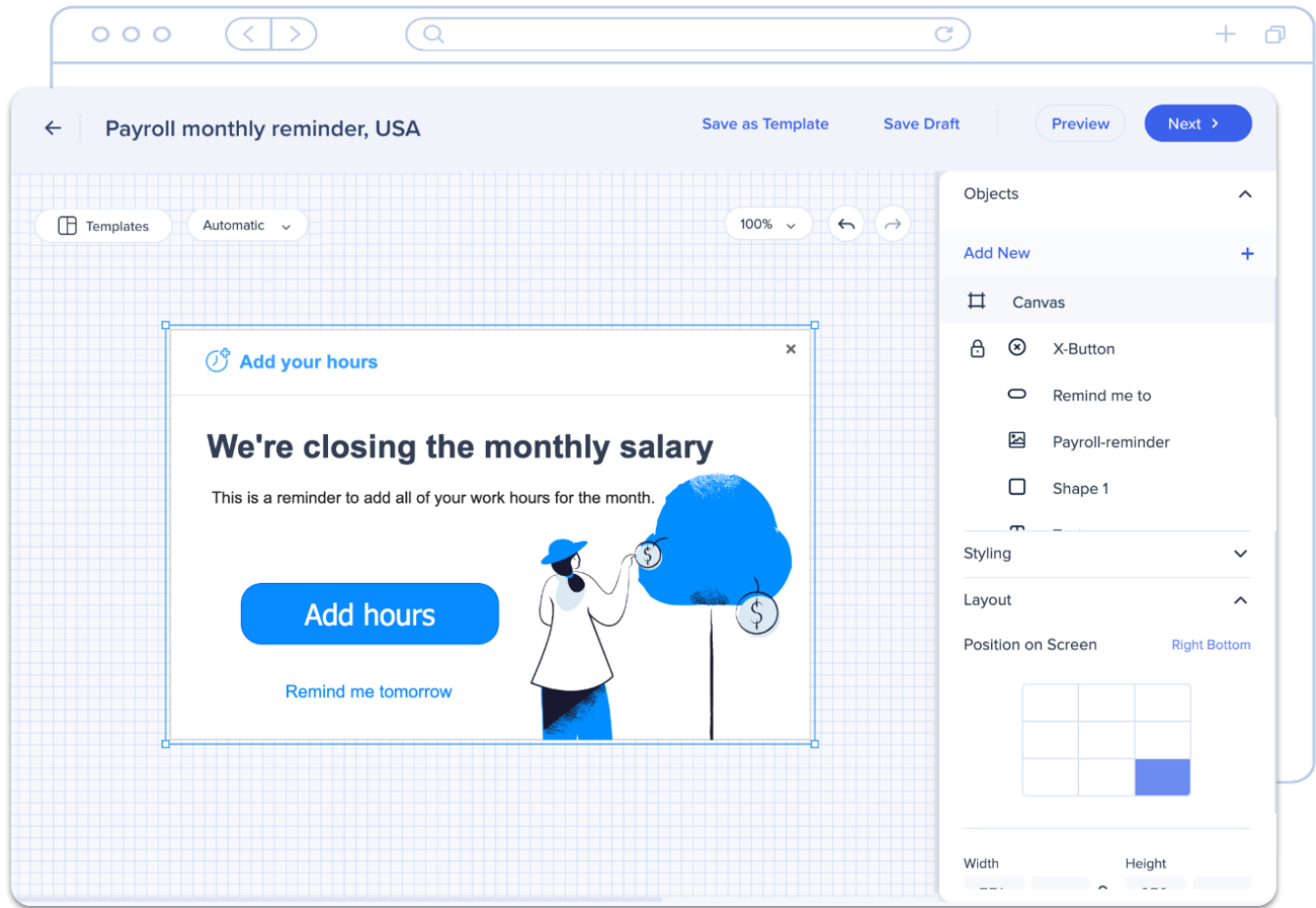


[Learn more about templates.](#)

Step 2: Edit the Notification

Edit the notification to your needs. You can add new images, change the button action, and much more in the design panel!

[Learn about designing and editing a notifications or custom templates in the Notification Visual Designer \(W5G\).](#)



Editing a live notification

You can edit a notification after it has been sent, however the notification's status won't change for the recipient. So if the recipient already read the old version, the new version will remain marked as read and the recipient won't get notified of the change.

Step 3: Add Title and Description

When you're ready, click Next from the Visual Designer to add recipients, audiences and schedule or send the notification!

To begin, add the notification Content (title and description).

Title and Description - Type a notification title and description that will be visible to recipients in the push notification and the Workstation Notification list.

Content

Title ⓘ

Join us at #Elevate22!

34/44

Description

Elevate 2022 is LIVE now on-site in San Francisco and virtually with a great group of DAP Professionals!

0/250

Step 4: Select Notification Type, Add Audience, Schedule

Next, define the delivery settings, fill out the following:

Delivery

Target audience

Select audiences 

 Add individual recipients

Delivery Timing

 Now

 Schedule

Start Date

End Date

2021-04-07, 05:01 AM

2021-04-07, 05:01 AM

☐ Send in local timezones

Recurrence

None 

Delivery Type



Push

A native alert which opens a popup.



Popup

An on-screen popup.

(1) Target Audience – select the audiences you want to send this notification to. [Learn more about audiences.](#)

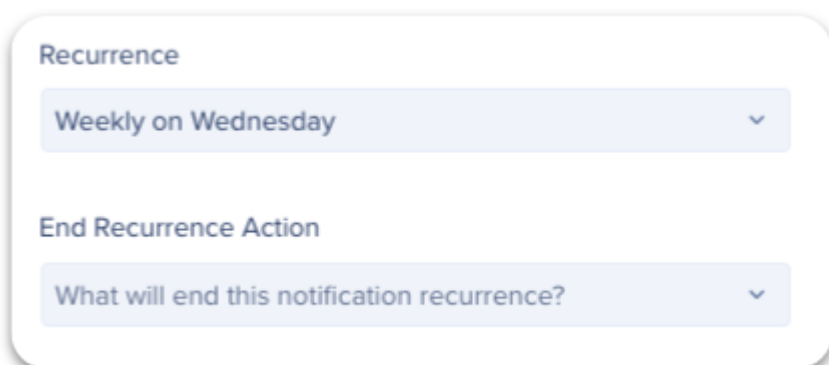
- Select as many audiences as necessary
 - Editor Segments without rules **won't be visible** in the Audiences list
- **Add individual recipients:** Add up to 100 individual users to send this notification
 - Only users that have logged into Workstation at least once appear in the list

(2) Delivery Timing: Send the notification now or schedule it

- Add a start date and an End Date – this is the notification lifecycle. As long as the date falls within this range, the notification will be accessible in the Notification page on Workstation. After the end date passes, the notification is removed from the Notification page and can no longer be read.
- Check **Send in local timezones** to schedule the notification to send in each recipients local time zone
 - Leaving the checkbox unselected means the notification will send during your timezone and play for everyone at that time

(3) Recurrence

- **Recurrence** – Select how often this notification will re-play (Daily, Weekly, Custom).
 - **Custom recurrence** enables you to determine how often the notification repeats, how many times it plays, and when it should stop recurring.
- The notification **End Date** and **Recurrence End** are different:
 - You can have a notification repeating daily for the next 2 weeks, but keep the Notification active until the end of next month.
- **Stop notification recurrence based on user action**
 - You can stop recurrence after a user clicks specific button(s) – determined when creating notification.



Recurrence

Weekly on Wednesday

End Recurrence Action

What will end this notification recurrence?

(4) Delivery Type – select how you want your recipients to receive the notification:

- **Popup** - notification appears on the recipients screen.
- **Push**- a banner notification will appear in the bottom right corner of the employee's screen, letting them know there is a new notification in the Workstation Notification list.
 - **Push Notifications version** requirements:
 - Mac desktop version 2.0.0 or above
 - Windows desktop version 8.1 or above
- **Delivery to mobile Workstation:** Mobile users will get a native notification with push notifications only. If the delivery type is popup, then the notification will appear in the mobile's notification list, but there won't be an alert on their device.
 - Scheduled notifications aren't supported on mobile Workstation yet. Even if the delivery type is push, if the notification is scheduled to delivery on a time other than 'now', there won't be a mobile alert.

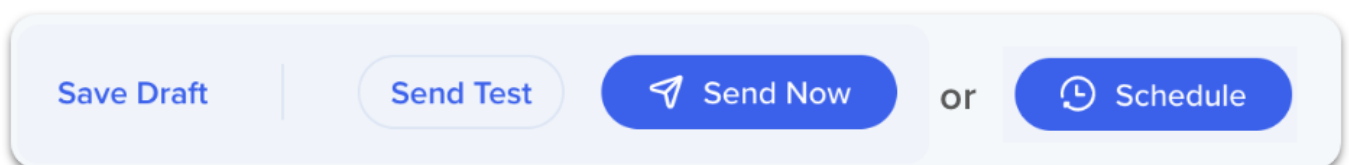
Recipients with multiple devices

If a recipient is connected to multiple devices using Workstation, and both devices are active simultaneously, notifications will appear on both devices. However, if device A is inactive and the recipient views the notification on device B, signing in will mark the notification as read on device B. The notification will not reappear as a pop-up, but it will still be accessible on the Notification page for reference.

Step 5: Save and Preview

Now it's time to Send the notification! You can either:

Save the notification as a draft - Click **Save Draft** to come back to this task later.



- All of your preferences will be saved too.
- Come back to it by going to the Drafts tab in the ComCenter homepage.
- This option is not available when **Editing** a notification that is already **Active** or **Scheduled**.

Send a test - Click Send Test to see how the notification will appear on your screen.

- **Version** requirements
 - Mac desktop version 1.9 or above
 - Windows desktop version 8,1 or above
 - Test only works if the installed **Workstation** matches the active version in the

Communication Center.

- AKA, preview will not work when impersonating customers unless you also have their Workstation client installed.

Send Now / Schedule the notification – One of these buttons will appear based on the date preferences you added.

- Click **Send Now** to publish the notification immediately.
- Click **Schedule** to schedule the notification based on your preferences.

After you notification has been published and sent, [review the engagement analytics to track the impact your notification had](#).

Technical Notes

- Increasing the zoom display on PC screens to over 100% will affect the appearance of the notification
- The notifications page will not be visible if there are no notification, including notifications that were created 90 days ago or older)