

Creating a Funnel in Insights

Creating a Funnel

- 1. Sign into your Insights account at <u>insights.walkme.com</u>;
- 2. Click the Funnels tab on Insights' left sidebar;
- 3. Click + *NEW FUNNEL;*
- 4. A panel will pop in from the right enabling you to set up your Funnel:

CREATE A NEW FUNNEL		CLOSE ×
Funnel Name		
Enter funnel name		
STEP 1		
Please select event		▼ ÎII
STEP 2	Ļ	
Please select event		•
	+ ADD STEP	
× CANCEL		SAVE

- 5. Enter a name for your Funnel;
- 6. Select events to create two steps or more;
 - $\,\circ\,$ A Funnel must be built from at least two steps;

⁷¹ Stevenson Street, Floor 20 San Francisco, CA 94105 | 245 Fifth Avenue, STE 1501 New York, NY, 10016 | 421 Fayetteville St STE 215 Raleigh, NC 27601 www.walkme.com



You must have <u>Tracked Events</u> defined or Custom Events available.
7. Click *SAVE*.

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