

Page Actions: Getting Started Guide

Brief Overview

Why make your users complete repetitive tasks when you can simply automate them? With Page Action Steps (previously known as Custom Actions), you can easily automate page-oriented actions, like redirecting them to a new page, refreshing the page, or just opening the WalkMe Menu. This way, your employees and end-users can focus on what really matters, instead of where to navigate to get to a feature.

When combined with Auto-Steps, you can remove repetitive steps in any process and even automate an entire process in minutes.

Page Action Steps can be added anywhere in a Smart Walk-Thru (see how in the Steps To Add Page Action Steps section below). When a user arrives at a Page Action Step you've created in a Smart Walk-Thru, WalkMe will execute the action you have pre-configured for the user. Presto!

□□Tip: WalkMe Compass Guide

[WalkMe Compass](#) offers in-app, step-by-step guidance to help you on this subject. Click on the link below to be redirected to the WalkMe Editor. You must be logged in to your editor in order for the guidance to launch.

[□ View the Page Actions Getting Started Guide](#)

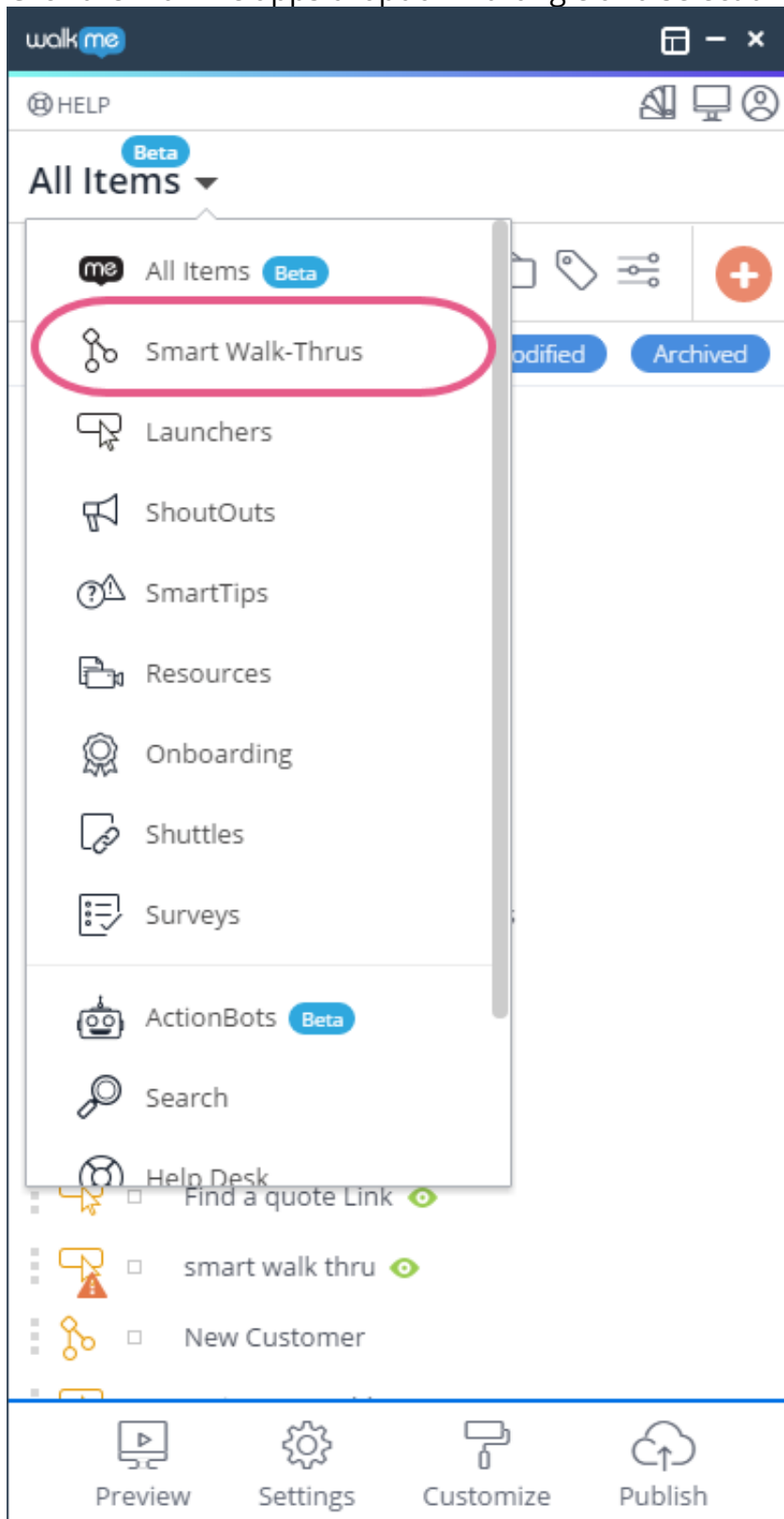
Use Cases

Page Action Step use cases include the following:

- Automatically perform the following page-oriented tasks on behalf of your users:
 - Redirect the user to a new page;
 - Refresh the page the user is on;
 - Open the WalkMe Menu for a user.

Steps To Add Page Action Steps

- Sign in to your WalkMe Editor account;
- Click the WalkMe apps dropdown triangle and select the Smart Walk-Thrus app:



- Either hover over the edit (pencil) icon on one of your pre-existing Smart Walk-Thrus and click Edit, or click the “+” icon in the upper right to begin creating a new Smart Walk-Thru;

- In a Smart WalkThru, hover over the orange plus sign between two steps where



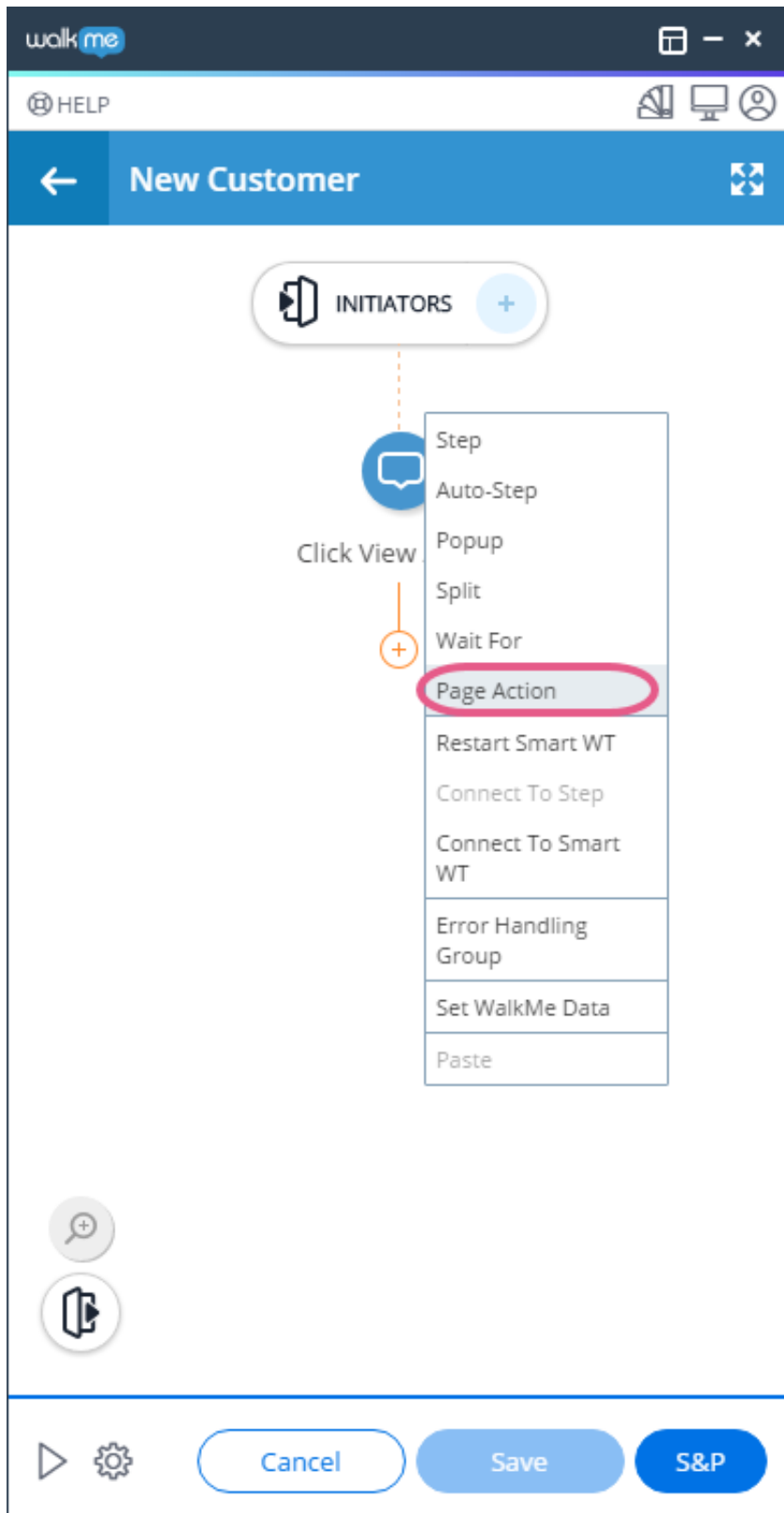
Click cart



Click Proceed to
checkout

you want to add a Connection Step:

- In the hover menu, select Page Action.



- Select which of the three actions you wish to execute (Refresh, Open Menu, or Redirect);
 - If you select the Refresh or Open Menu options, simply click the Done button;
 - If you select Redirect, add the URL to which you want the user

redirected, and select whether the user should or shouldn't be redirected if the user's current URL is identical to the one you've entered. Click the Done button.

1 Action type: Select, Redirect, Open Menu, Refresh

2 Redirect To:

Don't redirect if URL is identical

Redirect in new tab

- If you choose to redirect the user to a new page, enter the page's URL in the text box below.

1 Action type: Redirect

2 Redirect To: www.walkme.com ?

Don't redirect if URL is identical

Redirect in new tab

- When you've captured all the Steps you want, simply click SAVE per usual.
- The WalkThru will resume as normal following the page action.

