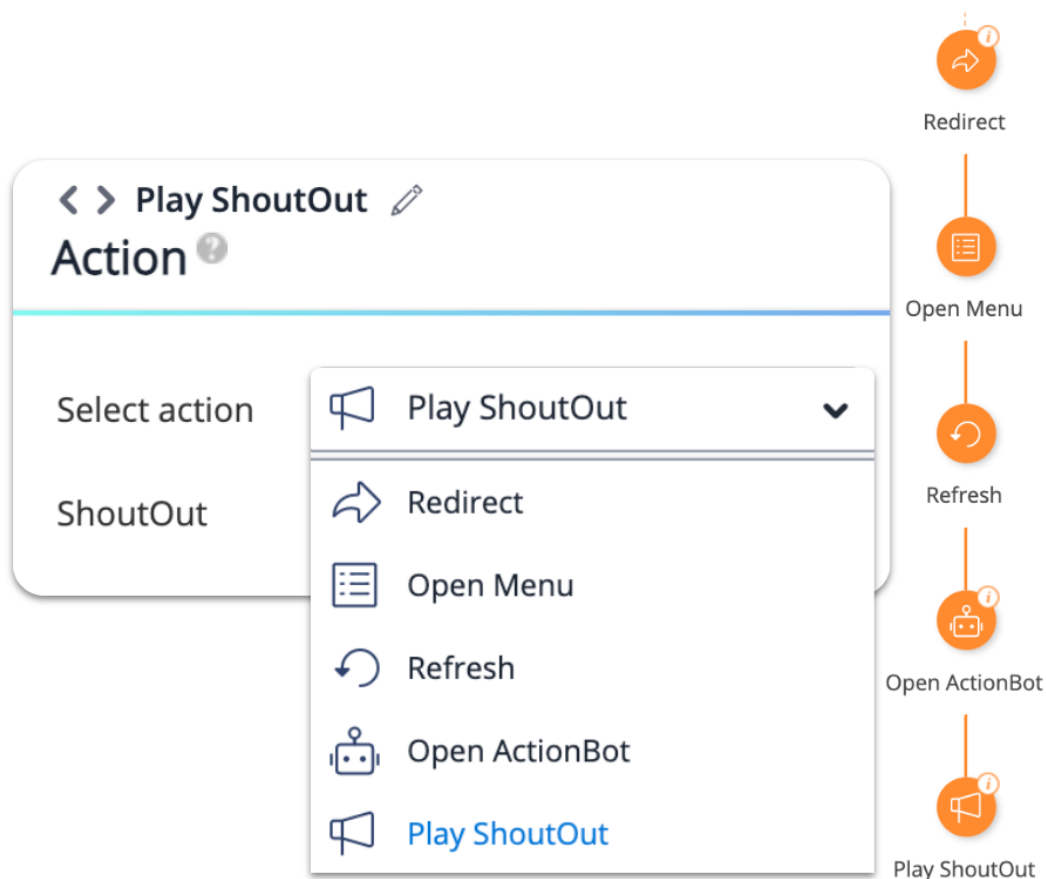


Action Step: Getting Started Guide

Brief Overview

Why make your users complete repetitive tasks when you can simply automate them? With Action steps, you can easily automate actions within your Smart Walk-Thru. For example, you can redirect users to a new page, refresh the page, open the WalkMe Menu, and more.

Action steps can be added anywhere in a Smart Walk-Thru. When combined with [Auto-Steps](#), you can remove repetitive steps in any process and even automate the entire process!



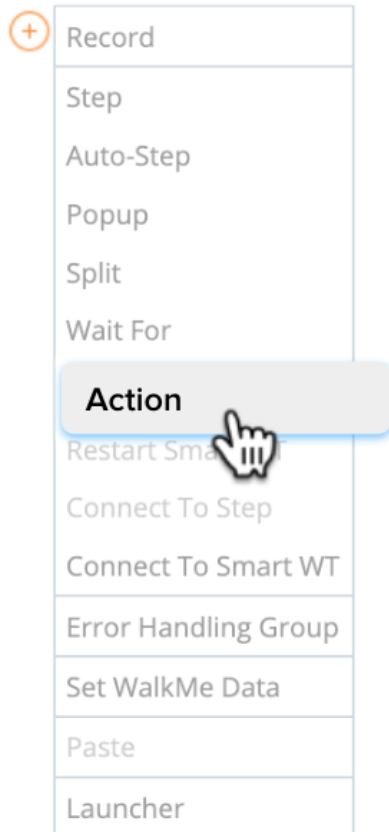
Automatically perform the following tasks on behalf of your users:

- Redirect the user to a new page
- Refresh the page the user is on
- Open the WalkMe Menu for a user
- Start an ActionBot conversation

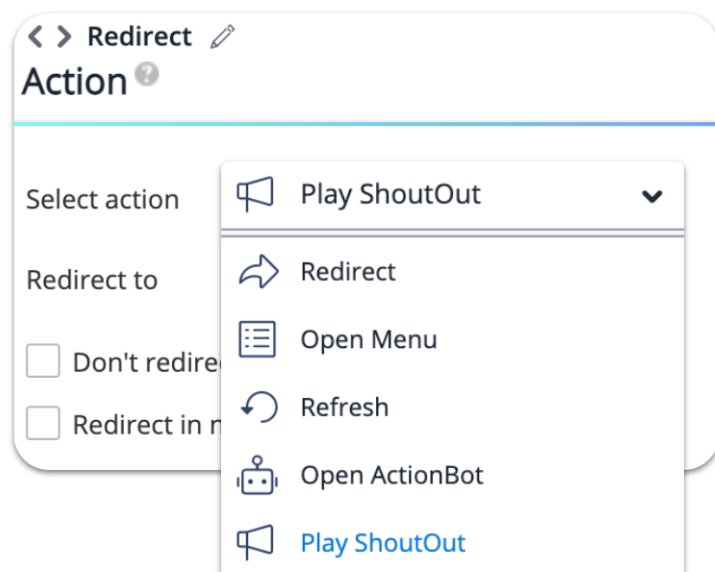
- Play a ShoutOut

Add Action Steps

1. In your Smart Walk-Thru, hover over the **orange plus sign**
2. From the step options, select **Action**



3. Select which action you wish to execute



Redirect

Add the URL of the page you'd like to navigate your users to in the text box.

- Check **Don't redirect if the URL is identical** to save the user from a page refresh
- Check **Redirect in new tab** to open the page in the new tab

Note

There is a 2,000 character limit for redirect URLs.

Use dynamic values in the URL field

You can add the following dynamic values in the URL field:

- [var]variableName[/var]
- [cookie]cookieName[/cookie]
- [wm-data]keyName[/wm-data]
- [jquery]jQuerySelector[/jquery]

Note

- https:// security protocol is automatically added to URLs

- Using one of the dynamic values above will still require the protocol, unless the URL begins with a dynamic value

Add a mailto link into the Smart Walk-Thru

This allows you to redirect to an email address instead of a web page URL.

- For example: <mailto:user@walkme.com>

When a user clicks on the mailto link, the default email application on the user's computer opens with the email address in the To line.

Open Menu

This action opens the WalkMe Menu that is in the same Environment as the Smart Walk-Thru.

Refresh

The refresh action refreshes the page the user is currently on.

Open ActionBot

The Open ActionBot action lets you start an ActionBot conversation from within the Smart Walk-Thru flow.

- Choose an ActionBot from the environment
- If you would like to start a specific conversation, check the **Start a specific conversation** box and select the conversation from the dropdown

Play ShoutOut

With the Play ShoutOut action, you can start a ShoutOut that you've already created.

Limitations

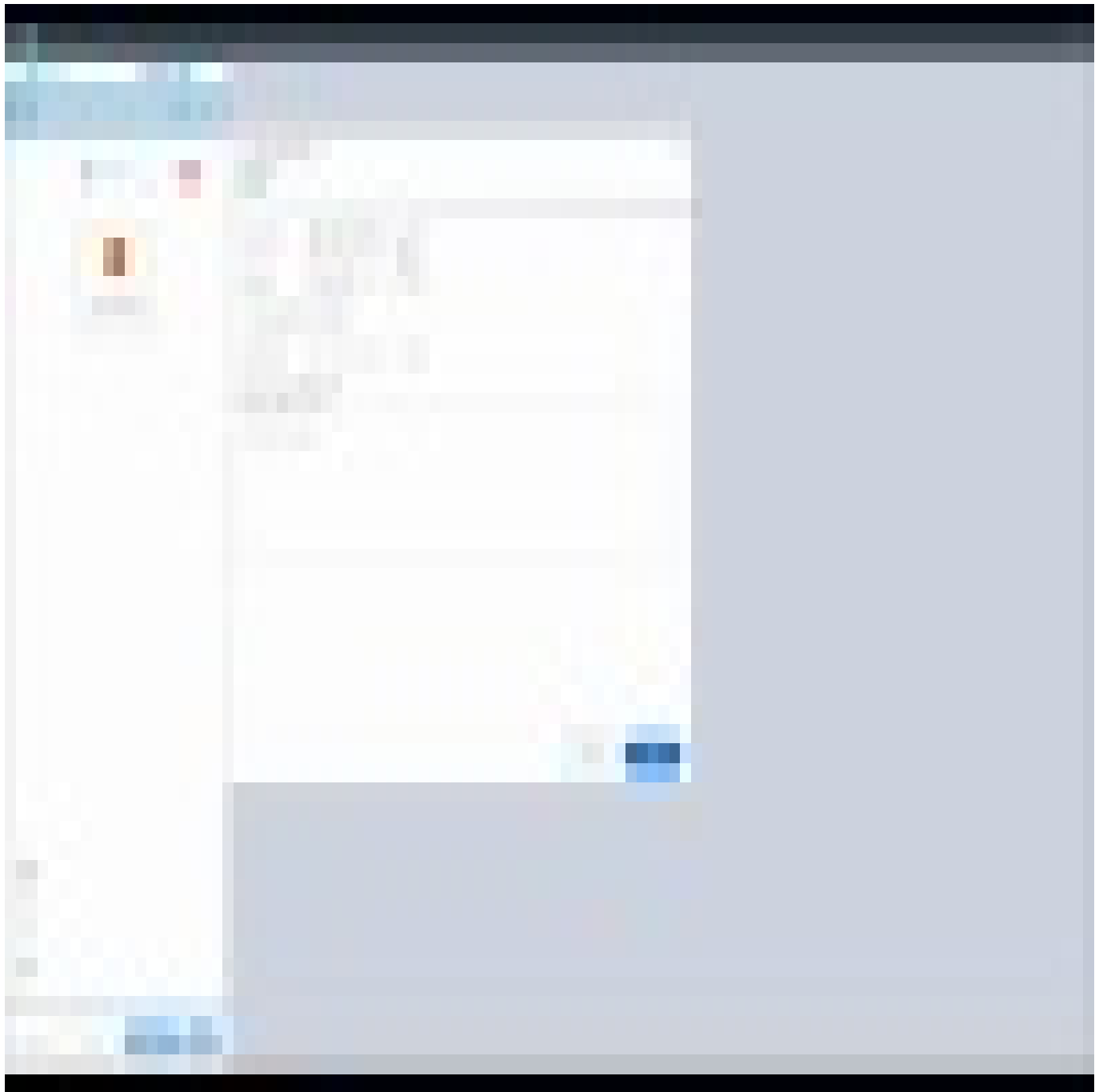
- During testing, ShoutOuts can be previewed but not played within the Smart Walk-Thru flow (similar to other linked items, such as a Survey or a Resource)
- To preview a flow that has "Play a ShoutOut" action, preview both the ShoutOut and the Smart Walk-Thru separately before previewing them together
- ShoutOut Smart Walk-Thru loop: If you have a ShoutOut that launches a Smart Walk-Thru and

then relaunches the same ShoutOut at the end of the Smart Walk-Thru, the ShoutOut will not play the second time

- Smart Walk-Thru ShoutOut loop: If you have a ShoutOut that was triggered from a Smart Walk-Thru, it will not be able to trigger another Smart Walk-Thru

Tip Tuesday Videos

Action Steps Overview





WalkMe Community

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