

Set WalkMe Data Flow Steps

WalkMe Data is information you can store in the end-user's browser such as when they select an item or land on a specific page. WalkMe Data is set using a WalkMe Data Flow Step. This data can then be used in the Rule Engine to contextualize your WalkMe support; for example, to Segment items, create Splits, or initiate a Walk-Thru to play automatically.

Short Version

Using WalkMe Data allows you to work with more complex scenarios by using WalkMe cookies as markers for user behavior. This stored data can be used to:

- Create a display [segment](#) that will display selected items only after another action has been completed
- Record the steps a user has completed in a long process in order to resume a Walk-Thru where they left off
- Play a [ShoutOut](#) after a certain amount of visits to a site if a user still has not completed their onboarding

How it works

WalkMe Data functions like a site cookie. It has a name (key), value, and duration and can be referenced later by WalkMe. By using rules in the [Rule Engine](#) you'll be able to test for the presence or value of WalkMe Data on the user's computer and have actions take place as a result. The duration is measured in seconds and can be made to stay on a user's computer for any amount of time (up to a maximum of ten years).

How to Set WalkMe Data (Smart Walk-Thrus)

Add a WalkMe Data Flow Step to your Smart Walk-Thru

To create cookies, determine where in the Walk-Thru you would like to set the cookie and click Set WalkMe Data.

Looking to set WalkMe Data in a classic Walk-Thru? [Check out this article on WalkMe Data Super Steps.](#)

Configure the Cookie

Enter the following:

- **Name:** Name of the data that you wish to store. In other words, it is what you are trying to measure. **TIP:** When choosing a name for your Key, use the prefix “wm-” this way you can avoid any potential overlap with cookies from your site. For example, *wm-incorrect_password_entries*. Do not use any spaces
- **Type and value:** When WalkMe Data stores information in the browser, the Value will be an indication that the action has occurred. Use “Yes” as the value if you are checking for an action that only occurs once. Use a number as the value if you are trying to identify how many times the user has completed a specific action
- **Storage duration:** WalkMe only stores data for a specified amount of time. Specify the length of time you wish the information to be stored. This input is in seconds; for example, 1 day = 86400

< > Set WalkMe Data
Set WalkMe Data

1 Name
Example: wm-unique-name
2 Type and value
Text (Value)
3 Storage duration
Seconds
Duration

Notes
Enter your notes here...

Cancel Done

Rename the Cookie

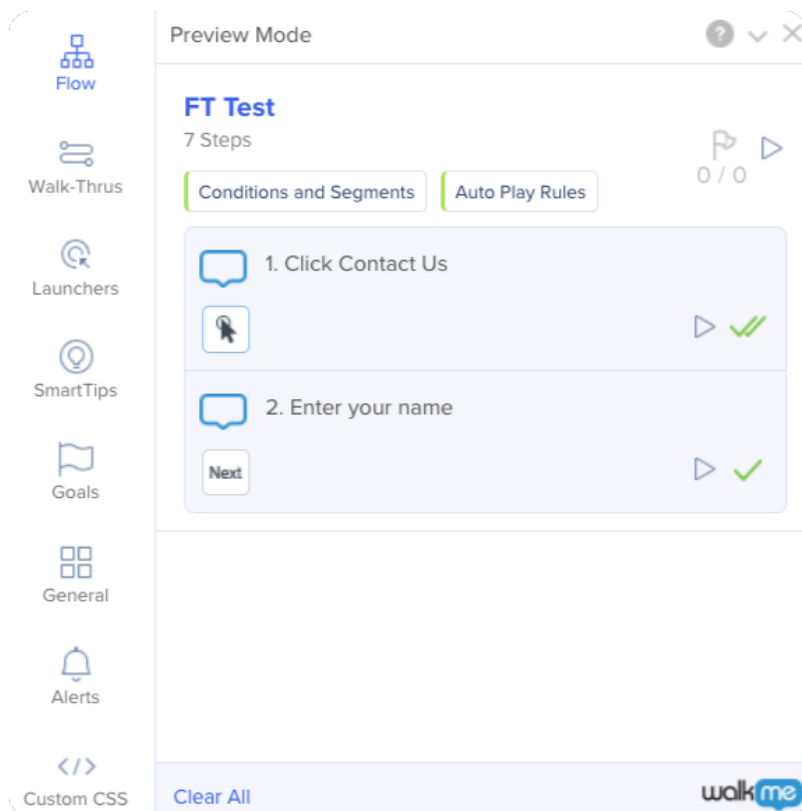
Make sure to change the name of the WalkMe Data Flow Step so that it is easy to tell what it is in the Smart Walk-Thru Map in the Editor.

Test using the Flow Tracker

After creating the WalkMe Data Flow Step, try playing the Walk-Thru in Preview or published to your test environment to check whether the cookie is being set. You will be able to see the WalkMe Data Flow Step in the [Flow Tracker](#).

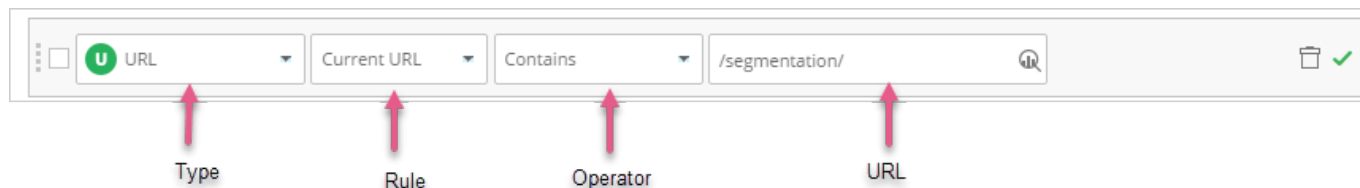
Note that for the purposes of testing, it can be difficult to test if you use long duration of time. When testing if your counter is working, change the duration to a few minutes, to make sure it properly counts each action. Then if everything works properly, be sure to change it back to the correct time.

One thing to remember is to avoid using Incognito mode on your browser when your Walk-Thrus contain WalkMe Data because the cookies won't be stored beyond that session regardless of the duration you set.



How to use WalkMe Data

The utility of WalkMe Data comes from the use of this information in a Rule. To create a Rule using WalkMe Data, choose the User Data Rule Type and then Select WalkMe Data.



The screenshot shows a rule configuration bar with four main sections. Below each section is a red arrow pointing to it, with a label underneath the arrow. From left to right: 1. A dropdown menu showing 'u URL' with a green 'u' icon; a red arrow points to it with the label 'Type' below. 2. A dropdown menu showing 'Current URL'; a red arrow points to it with the label 'Rule' below. 3. A dropdown menu showing 'Contains'; a red arrow points to it with the label 'Operator' below. 4. A text input field containing '/segmentation/' with a magnifying glass icon on the right; a red arrow points to it with the label 'URL' below. On the far left of the bar is a small square icon with three horizontal lines. On the far right is a trash can icon and a green checkmark icon.