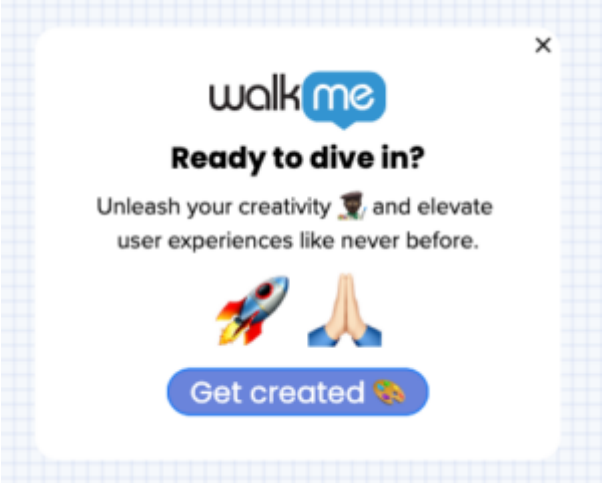
ShoutOuts: Getting Started Guide

Brief Overview

Create a ShoutOut that will pop-up on screen and present a message to your users, often times updates, tips, or feature promotions. ShoutOuts can be customized and scheduled to appear to users at specific times, or in response to certain actions.

Unlike step balloons, ShoutOuts are not attached to an element on the page. They will appear in a fixed place on screen, and can be played from a Launcher, permalink, or using Auto Play.

Read on for a guide on how to get started building them. By using WalkMe's Visual Designer, creating a stylish and effective ShoutOut can be done in minutes.



ShoutOuts Overview

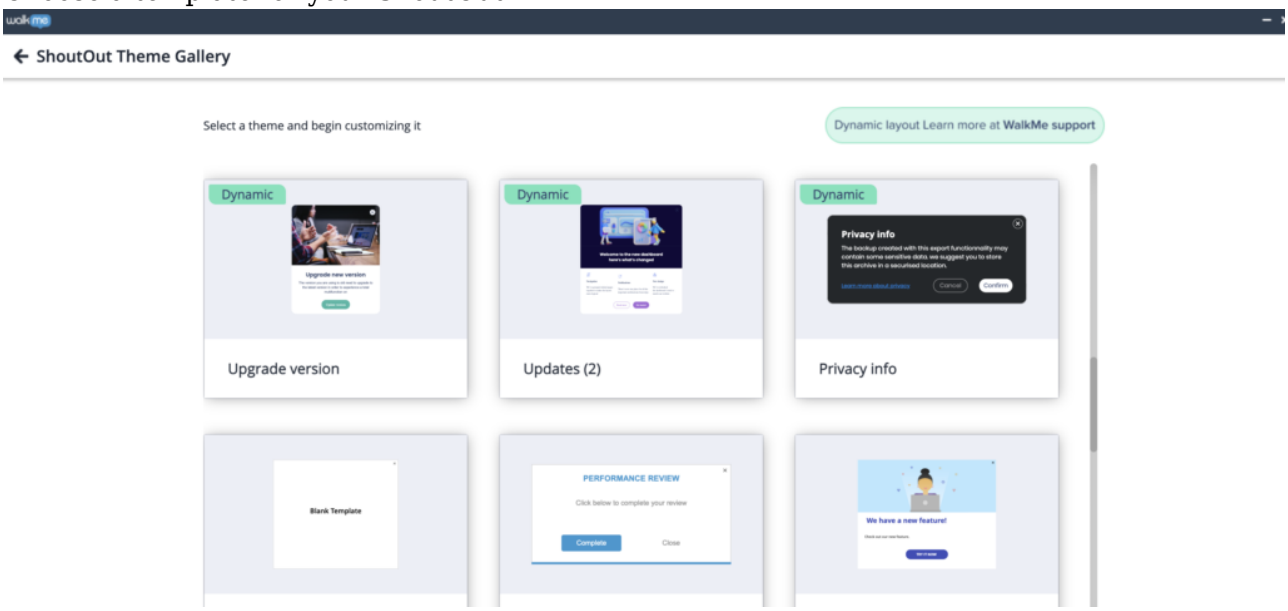
 Digital Adoption Institute

- View the *ShoutOuts* course in the DAI
- Don't have a DAI account yet? Sign up here

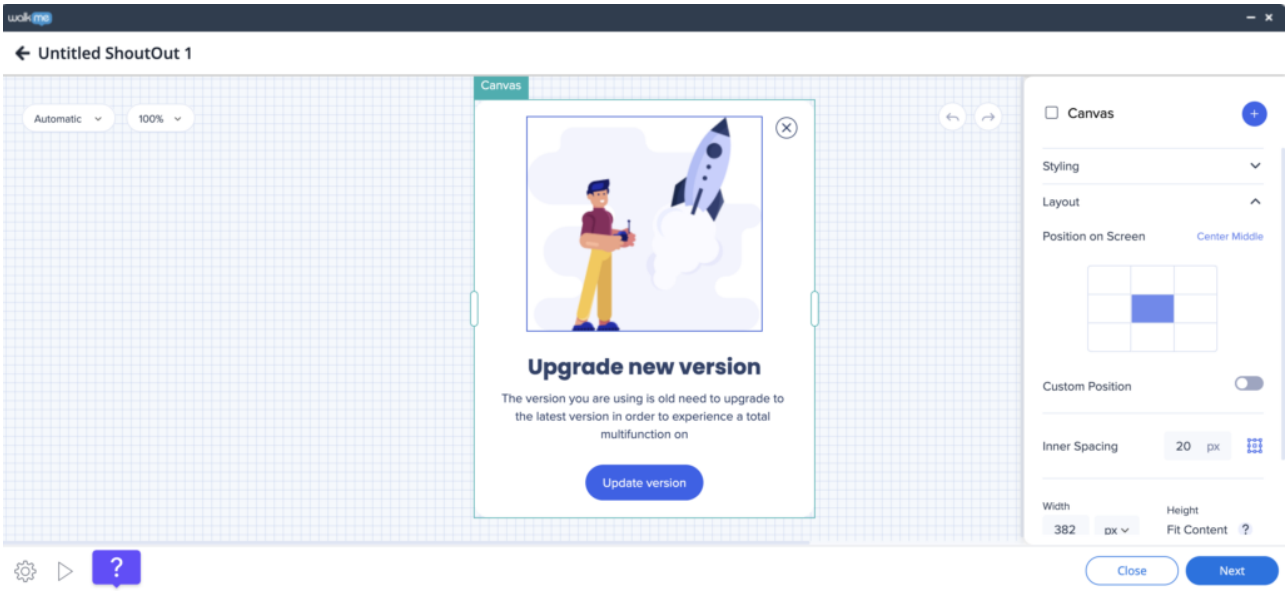
Create a ShoutOut

This guide covers how to create ShoutOuts, not Classic ShoutOuts

1. In the WalkMe Editor, click the blue plus sign and select **ShoutOut**
2. Give your ShoutOut a name
    - **Note**: This name will not be visible to your users
3. Choose a template for your ShoutOut



4. Customize your ShoutOut design using the Visual Designer



5. Click **Next** to configure the ShoutOut settings
6. Click **Save**

Tip

Each design in the ShoutOut Theme Gallery was built with a specific use case in mind, but you can choose the theme based on the style that works best for your needs. You can edit the text of any part of the ShoutOut directly in the ShoutOut preview.

Visual Designer

ShoutOut Settings

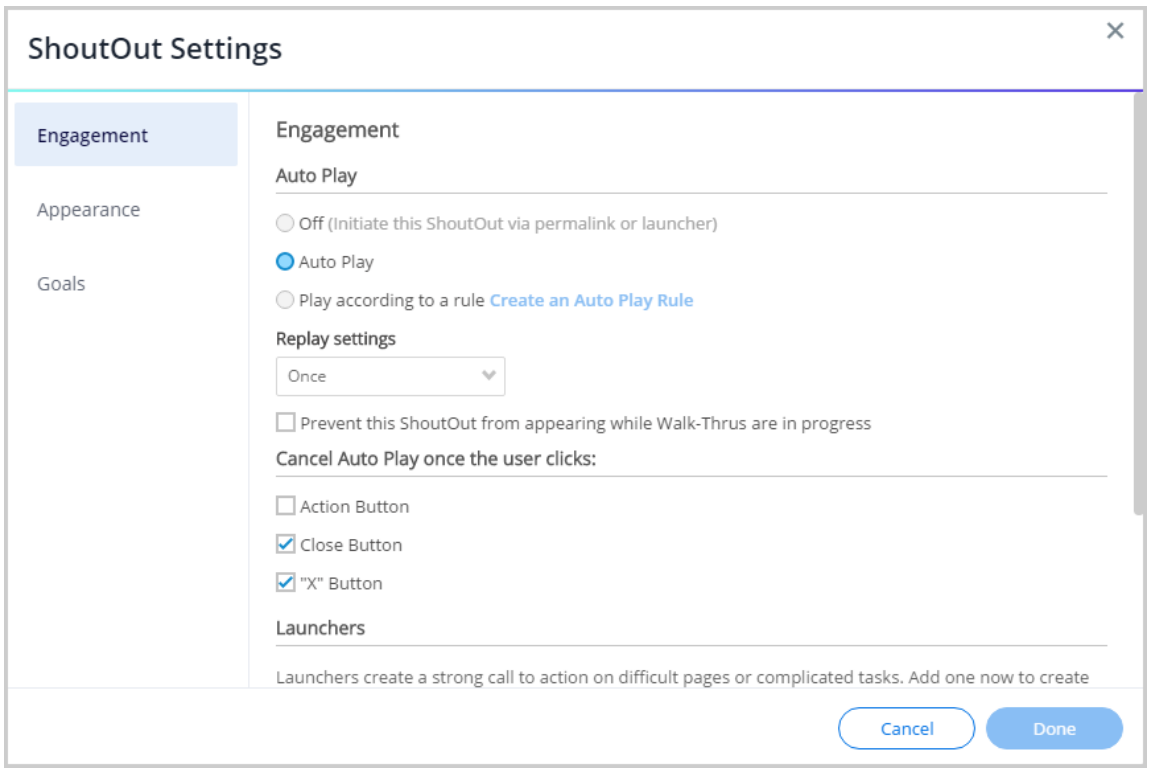
To access ShoutOut settings, click the **Settings** icon.

Tip

Remember to click **Done** to save the ShoutOut settings, and then click **Save** to save the ShoutOut.

Engagement

In the **Engagement** tab you can determine how the ShoutOut will play.



Auto Play

Setting up Auto Play for your ShoutOut lets it automatically display to users based on set conditions. WalkMe will constantly check for the conditions identified in the rule engine and segmentation center and once true, the ShoutOut will automatically play without any active prompt from the user. All the standard rules can be used to determine which conditions Auto Play will activate (for example, URL, On Screen Element, and jQuery).

- **Off**: ShoutOut will play from a permalink or launcher
- **Auto Play**: ShoutOut automatically displays on pages that have WalkMe installed
- **Play according to a rule**: Use the rule engine to choose conditions that determine when a ShoutOut automatically plays

Auto Play: Getting Started Guide

Tip

Auto Play rules should always begin with a URL, so that WalkMe only checks the auto play conditions on the correct page. The URL rule may be the only rule needed, but you can also add additional rules based on user actions.

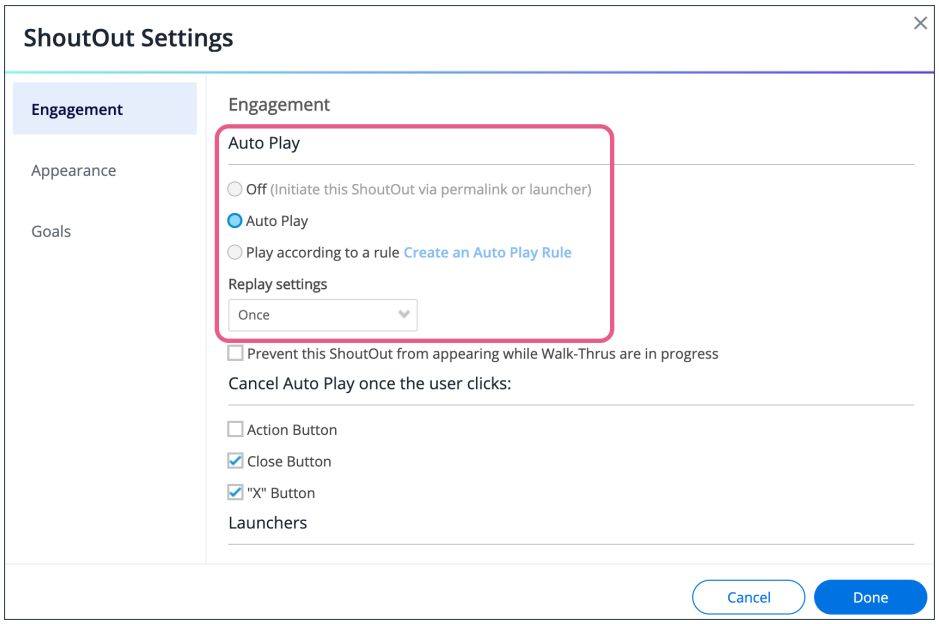
Replay settings:

Select how frequently the ShoutOut appears.

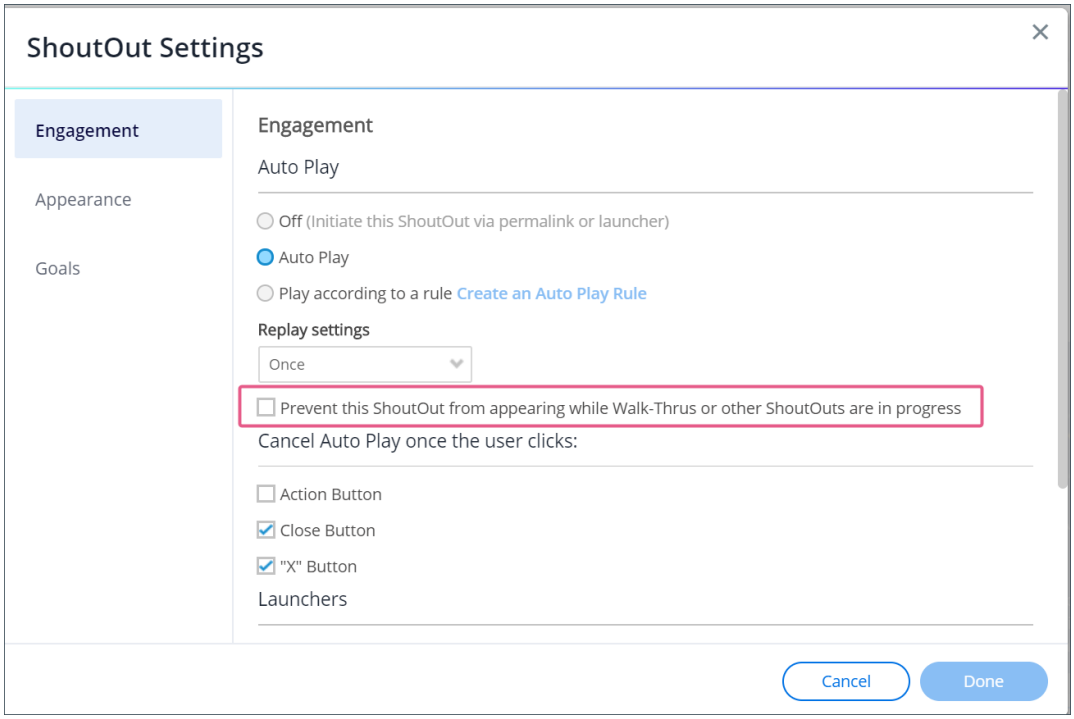
Choose between **Once**, **Once a Day**, **Always**, and **Custom**.

- **Once**: Plays only once
- **Once a Day**: Plays the first time the Auto Play rules are true each day
- **Always**: Plays every time the Auto Play Rules are true
- **Custom**: Plays according to conditions set in the frequency scheduler

Auto Play Frequency Scheduler



It is also possible to have ShoutOuts not play while a Smart Walk-Thru or another ShoutOut is in progress by checking the **Prevent this ShoutOut from appearing while Walk-Thrus or ShoutOuts are in progress** box.



Cancel Auto Play once the user clicks:

You can also choose when auto play for the ShoutOut will be cancelled. The Auto Play will stop when the user clicks any of the buttons checked.

- **Action Button**: Cancels Auto Play when the user clicks an Action button, including Open Menu, Play Smart Walk-Thru, Play Resource, Play Action Bot, Play Shuttle, Play Survey, Play ShoutOut, None, and Link. Learn more.
- **Close Button**: Cancels Auto Play when the user clicks the close button, the close button can be customized with different text, but clicking it will "close" the ShoutOut. Learn more.
- **"X" Button**: Cancels Auto Play when the user clicks the "X" button that looks like an "X" and is located in the top right corner of the ShoutOut. Learn more.

Tip

Checking the Action Button is recommended because it ensures that the user has interacted with the ShoutOut.

Note

"Remind me" buttons cannot be used for cancelling Auto Play.

Launchers:

Use a Launcher to play the ShoutOut.

> Launchers: Getting Started Guide

Permalink:

Using a permalink will give you a direct link to your website that automatically start a ShoutOut when clicked.

> Permalinks

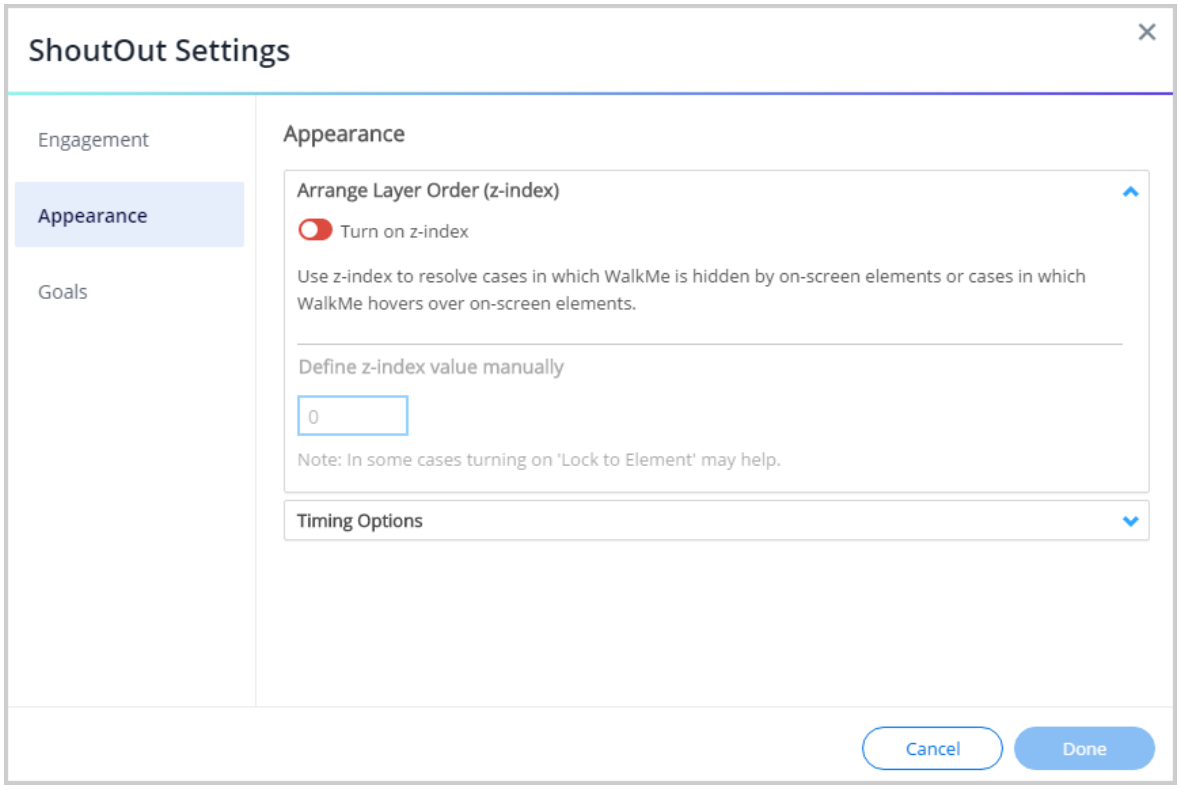
Appearance

In the **Appearance** tab you find advanced settings on how your ShoutOut will appear to users.

Arrange Layer Order (z-index):

Use the z-index to arrange the layer order of your ShoutOut on the screen. This allows you to make sure that your ShoutOut appears correctly, and is not hidden behind other elements.

> WalkMe Items Appearing Above or Below Site Elements? Change the Layer Order (Z-Index)

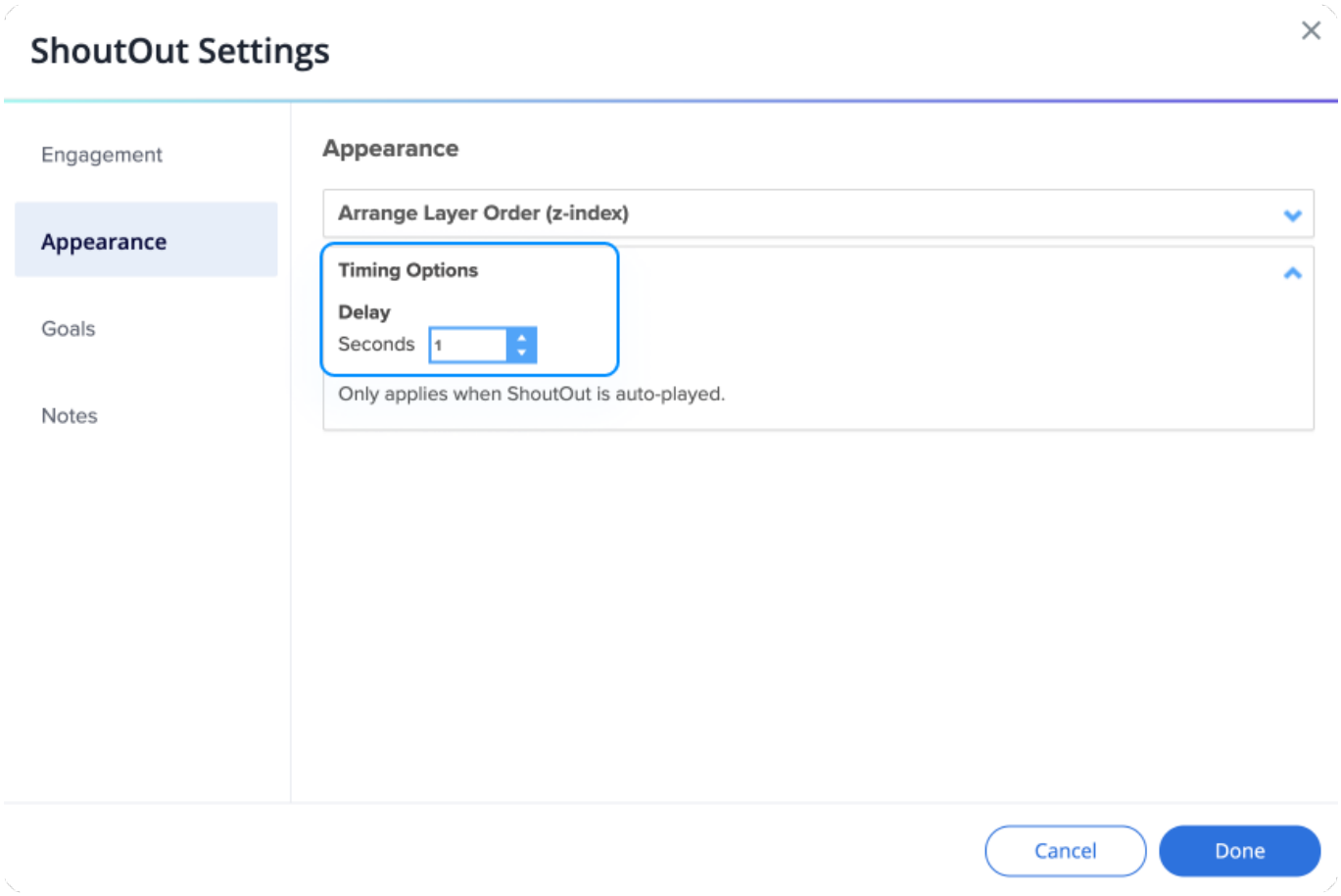


Timing Options:

If your ShoutOut is auto-played, you can also select the timing options of your ShoutOut and decide if you would like to add a delayed appearance.

Tip

If a ShoutOut is appearing along a Smart Walk-Thru when it shouldn’t, try delaying it by few seconds, usually 1 is enough.

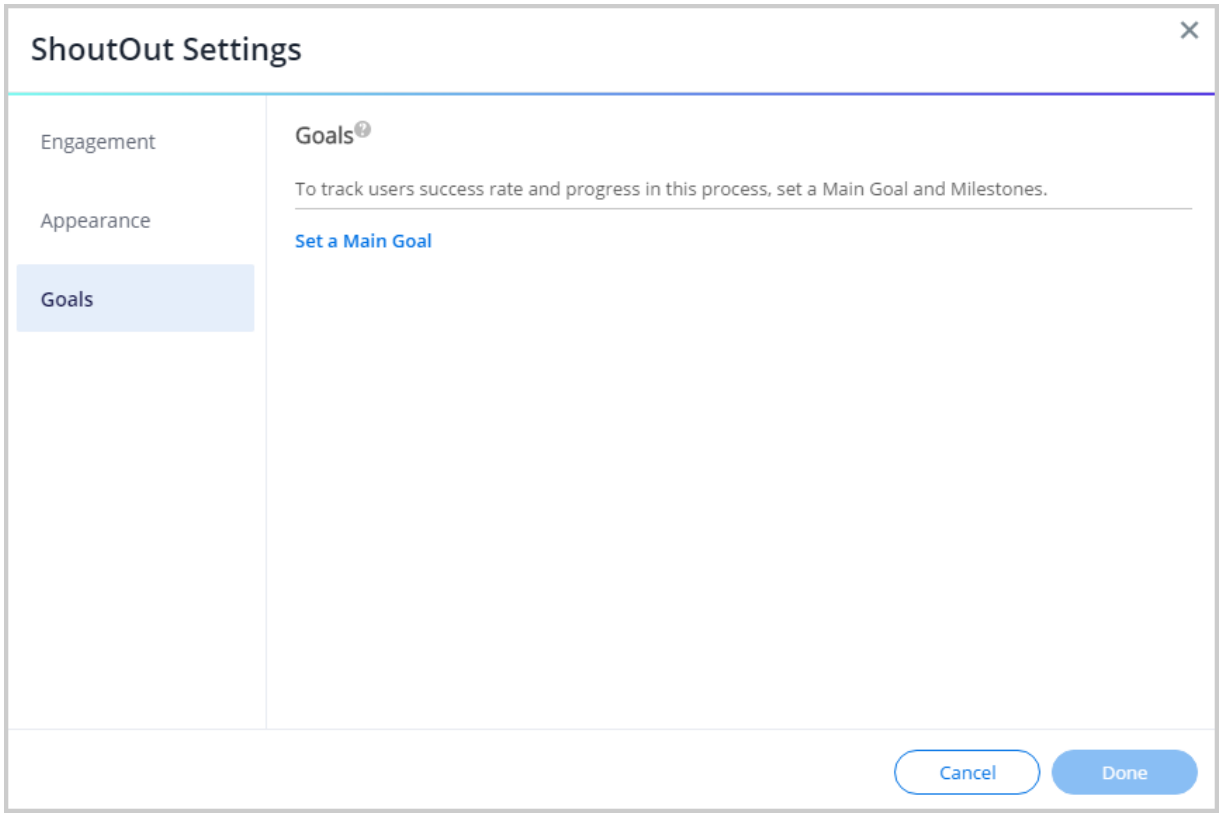


Goals

Set goals to measure the efficacy of your ShoutOut. Just like Smart Walk-Thrus, ShoutOuts can have Main Goals and Milestones Goals. The goals will begin to be checked as soon as the ShoutOut has been played and will continue to track for two hours after.

For example, a ShoutOut that announces remaining days in a trial account with an action button to the upgrade page could have a main goal that measures how many users actually upgrade, and a milestone goal that measures visits to the upgrade page. Even if someone does not immediately upgrade upon seeing the ShoutOut, if they decide to upgrade within the next two hours you will be able to track completion.

Goals



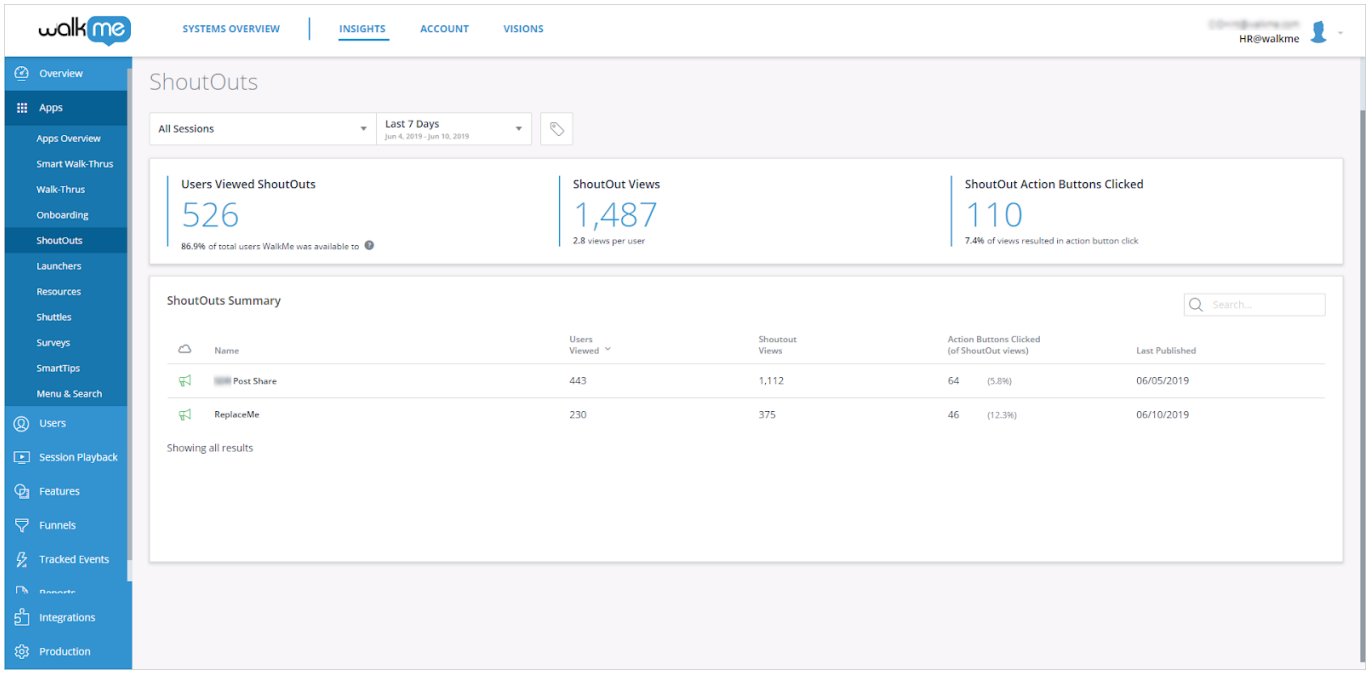
Tip

Set up ShoutOut Goals so you can keep track of whether the ShoutOut is influencing user action.

ShoutOut Insights

Once you create your ShoutOut, make sure to track the results in Insights. From the ShoutOut dashboard you can view how many times each ShoutOut has played, how many times the Action button has been clicked, and how many goals were completed.

[Insights Apps Pages]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INSIGHTS
ACCOUNT
VISIONS
HR@walkme
Overview
Apps
Apps Overview
Smart Walk-Thrus
Walk-Thrus
Onboarding
ShoutOuts
Launchers
Resources
Shuttles
Surveys
SmartTips
Menu & Search
Users
Session Playback
Features
Funnels
Tracked Events
Integrations
Production
ShoutOuts
All Sessions
Last 7 Days
Users Viewed ShoutOuts
526
86.9% of total users WalkMe was available to
ShoutOut Views
1,487
2.8 views per user
ShoutOut Action Buttons Clicked
110
7.4% of views resulted in action button click
ShoutOuts Summary
Search...
Name
Users Viewed
Shoutout Views
Action Buttons Clicked (of ShoutOut views)
Last Published
Post Share
443
1,112
64 (5.8%)
06/05/2019
ReplaceMe
230
375
46 (12.3%)
06/10/2019
Showing all results