

Smart Walk-Thru: Getting Started Guide

Brief Overview

Smart Walk-Thrus provide step-by-step on-screen guidance through a complex process using balloons to guide the user.

For more information on Smart Walk-Thrus, view the [Smart Walk-Thru support article](#).

□□Tip: WalkMe Compass Guides

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

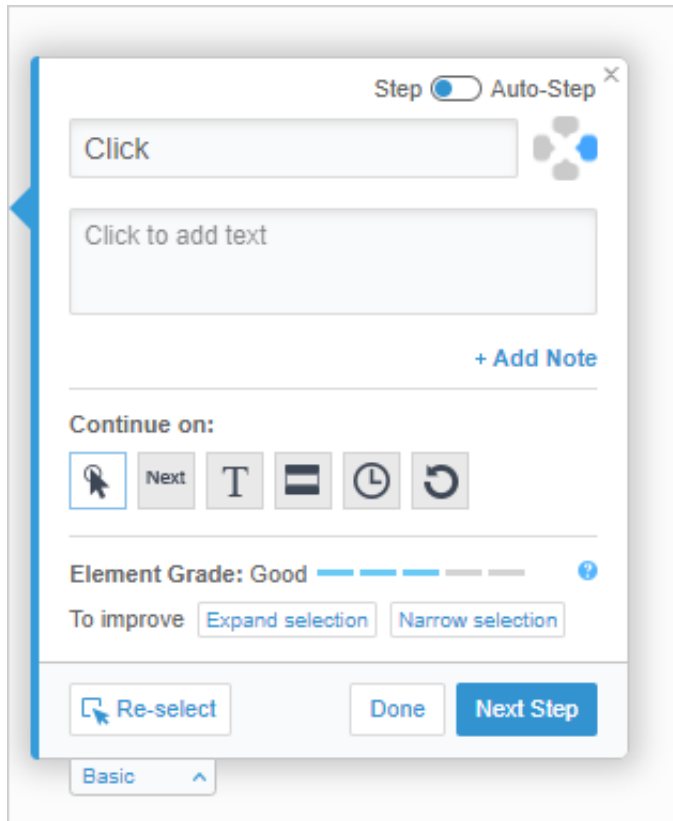
□ [View the Smart Walk-Thru Overview Guide](#)

Create a Basic Smart WalkThru

- In the WalkMe Editor, click the orange plus sign and select Smart WalkThru.



- Name the Smart WalkThru. This name will be visible to your users in the WalkMe Menu, so choose a name that makes the WalkThru's goal clear to your users.
- Click the orange plus sign to add steps to the Smart WalkThru. This will open the in-browser editor window.



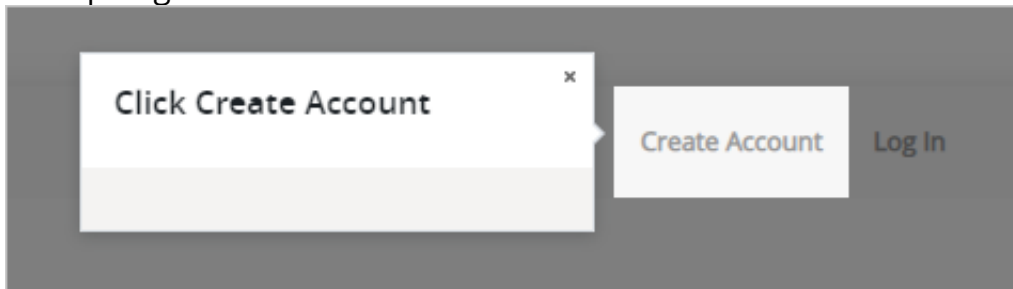
- You will then be prompted to select an element and enter text instructions. WalkMe will attach a balloon step to this element.
INCLUDE NAVIGATIONAL STEPS: Users will be able to access your Smart WalkThru from anywhere on your site, so the first step in your Smart WalkThru should be available on every page of your site. Start with a button in the navigation menu or a link to the home page.
- Click the orange plus sign again to add additional steps to this process.
AVOID ADDING UNNECESSARY STEPS: For many forms, you can use SmartTips instead of balloon steps. The most successful WalkThrus are no more than 12 steps long.
- When you have added all the necessary steps, click Save.

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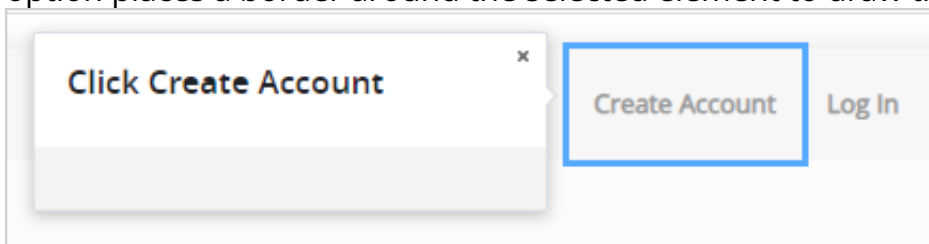
□ [View the Creating a Smart Walk-Thru Guide](#)

Customize Smart Walk-Thru Steps

- Open the Smart WalkThru that you want to customize, and open a specific balloon step by clicking on the balloon icon.
- On the Interaction page, you can adjust the balloon settings that were created when you initially created the step in the browser. Here you can change the text of the balloon, the position of the balloon, and the triggers that are used to advance the balloon step.
- Click the Appearance tab to change the appearance of the balloon. Commonly used features in the Appearance tab are the Spotlight Balloon and the Highlight option. The Spotlight Balloon limits user interaction to the selected element.



The Highlight option places a border around the selected element to draw the user's attention.



- Click the Selected Element tab to change the element that the balloon step is attached to. For more complex elements, you may want to change the way the element is defined by adjusting the element's precision. For more information on how to adjust an element's precision, visit the [Precision support article](#).
- Use the Customize on Screen! button to adjust the appearance and position of this balloon step in the browser.

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☐ [View the Customizing Smart Walk-Thrus Guide](#)

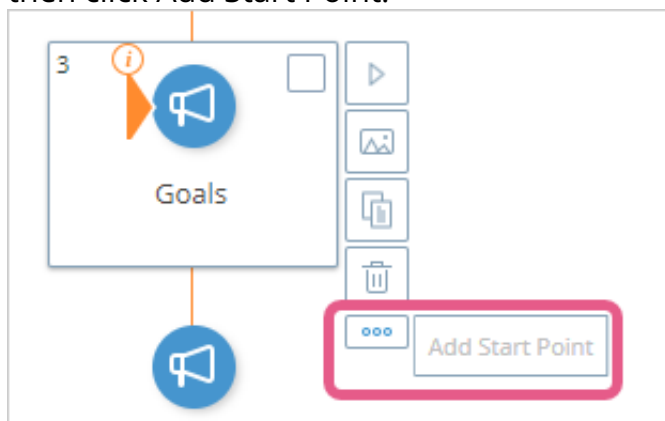
Add StartPoints

StartPoints allow you to begin playing your Smart Walk-Thrus at a specific step. This allows your user to begin the Smart Walk-Thru in the middle of the process, without repeating navigation steps that they have already completed.

RECOMMENDED: Add a StartPoint to the first step that is part of the main process. This will allow your user to skip the navigation steps required to begin this process from the home page. Any time the URL changes, this may be a good place to add a StartPoint.

It is important to note that StartPoints are evaluated beginning with the last step in the Smart WalkThru. The Smart Walk-Thru will begin with the furthest StartPoint that evaluates as true. If no StartPoints are true, the Smart Walk-Thru will begin with the first step. (It is never necessary to add a StartPoint to the first step in a Smart Walk-Thru.)

- Hover over a step to add a start point. Click the three dots in the hover menu, then click Add Start Point:



- In the StartPoint menu, click Create Rules
- In the Rules Engine, set the conditions for starting at this step. URL rules are the most common rules used when creating StartPoints. Click Done when complete.
- You can continue to add StartPoints to additional steps in this Walk-Thru.

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☐ [View the Smart Walk-Thru StartPoints Guide](#)

Add Goals

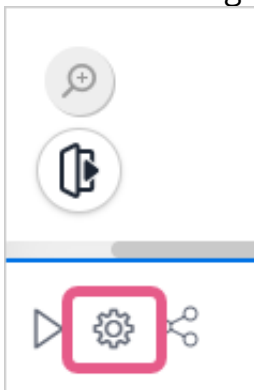
Goals allow you to track your users' success when completing Smart Walk-Thrus. You can attach a goal to a specific user action to determine when users have successfully

completed a Smart Walk-Thru.

A user may need WalkThru guidance to complete the majority of a process, but complete the final steps independently. Goals allow you to continue tracking user behavior after they close a Smart Walk-Thru so that you can determine when a user has completed a process, even if they have closed the Walk-Thru guidance.

For more information on Goals, view the [Goals support article](#).

- Open a Smart Walk-Thru to add a goal
- Click the Settings button.



- In the Goals tab in Settings, click Set a Main Goal.
- Use the Rules Engine to create a Goal. Your Goal Rules Set should include at least two rules.
It is important to start all Goal Rules with a URL rule, so that WalkMe only tracks user behavior on the relevant page.
The second rule should be the user action that completes the process. Often, this is the user clicking a Save or Submit button.
- Add the necessary rules, then click Done.

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☐ [View the Smart Walk-Thru Goals Guide](#)