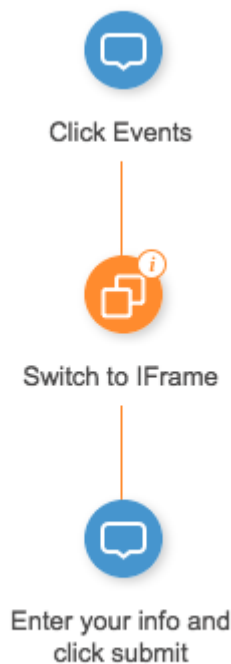


# Switch to Frame Flow Steps

## Brief Overview

Switch to Frame is a [Flow Step](#) that allows your Smart Walk-Thru to continue playing across domains, such as in an IFrame or an HTML popup window.



When your Walk-Thru includes steps that play on different domains, a Switch to Frame Flow Step will direct WalkMe where to play. As long as the WalkMe Snippet is installed on both domains, WalkMe will be able to continue playing seamlessly.

Common cross-domain steps include IFrames, which allow web pages to be embedded directly into another web page, and HTML popups, which appear as a new window over the original page. Both HTML popups and IFrames will have their own unique URL that is different from the original page.

For more information contact your WalkMe Account Manager.

## How it Works

In most cases, WalkMe will detect that your next step is in an iFrame and automatically add the Switch to Frame Flow Step to your Smart Walk-Thru when you capture a step that is in a different domain than the previous step. If the Switch to Frame is not automatically generated, you can create one in the Smart Walk-Thru Path.

Switch to Frames Flow Steps are automatically created with a rule that defines when it should activate. When the Walk-Thru plays a Switch to Frame Flow Step, WalkMe checks the rule to determine if it should switch. If true, WalkMe will switch to this URL and looks for the element of the next step. The Condition determines the URL WalkMe should switch to and if that URL is in an internal frame (IFrame) or a New Window (HTML popup).

### Cross-Domain Example

For example, you're building a Walk-Thru on mysite.com but one of the steps is on a page that has an Iframe that is on the domain othersite.com. When you add a step into the Iframe, WalkMe will insert a Switch to Frame into the Smart Walk-Thru before the Iframe step.



Auto created  
Switch Step

The rules for the condition will be automatically created:

## Switch Step Rules<sup>2</sup>

Create a rule to determine when to switch to a different pop-up or IFrame



[Group](#)

[Import Rules](#)

☐

U

URL

Current URL

Like

othersite.com\*

And

☐

Cf

Current Flow

Is in

An Internal IFrame

[+ Add Rule](#)

Enter your notes here...

[Done](#)

[Discard](#)

Current Statement: **False**

If you create another step that is not in the IFrame, WalkMe will insert another Switch to Frame Flow Step before the step with the rule "Current Flow Is Not In an Internal IFrame".



Auto created  
Switch Step



Enter info and click  
submit



Auto created  
Switch Step



Click Next

Switch Step Rules?

Create a rule to determine when to switch to a different pop-up or IFrame

×

Group

Import Rules

Cf Current Flow

Is Not in

An Internal IFrame

✓

+ Add Rule

Enter your notes here...

Done

Discard

Current Statement: True

## How to Use a Switch to Frame

### Insert a Switch to Frame

Most of the time, WalkMe will automatically insert a Switch to Frame where it is needed. If not, simply hover over the path before the step that plays in a new domain, and select Switch to Frame.

### Create a Rule to Define the Condition

If WalkMe automatically inserted a Switch to Frame into your Smart Walk-Thru, it will contain prepopulated rules. Make sure to open them to check.

If you created a Switch to Frame on your own, open the Switch to Frame Flow Step Options Menu and click Create a Condition. Here you will use a rule that identifies the URL on which WalkMe should play the next step. Use the Current Flow rule type that switches the Walk-Thru to A New Window. WalkMe only selects elements in the browser window that it's currently running on. To select elements in the popup window, open a new tab in the browser window that WalkMe is running on and copy the URL from the popup and paste it into the address bar of the new tab. Opening the URL for the popup in a new tab will allow you to select elements in the popup.

## Popups that are not Web-Based

Your site may open a dialog box that is not web-based, such as a download or upload popup window. These windows are part of your computer's operating system. Since WalkMe does not run locally on a computer, we commonly use a simple workaround to help users complete steps that take place on their computer. We recommend adding an additional step or popup with instructions that guide the user through the non-web based steps. You can even add a short gif or video to your balloon if the steps are complicated.

For example, you may have a Walk-Thru that leads customers through the process of creating their online profiles. During that process, you may ask them to upload a photo of themselves. This portion of the Walk-Thru requires customers to use a dialog box to select and upload their photos. Since WalkMe doesn't run in this dialog box, you can create a step that guides them through that process and lets them click Next when they are done.

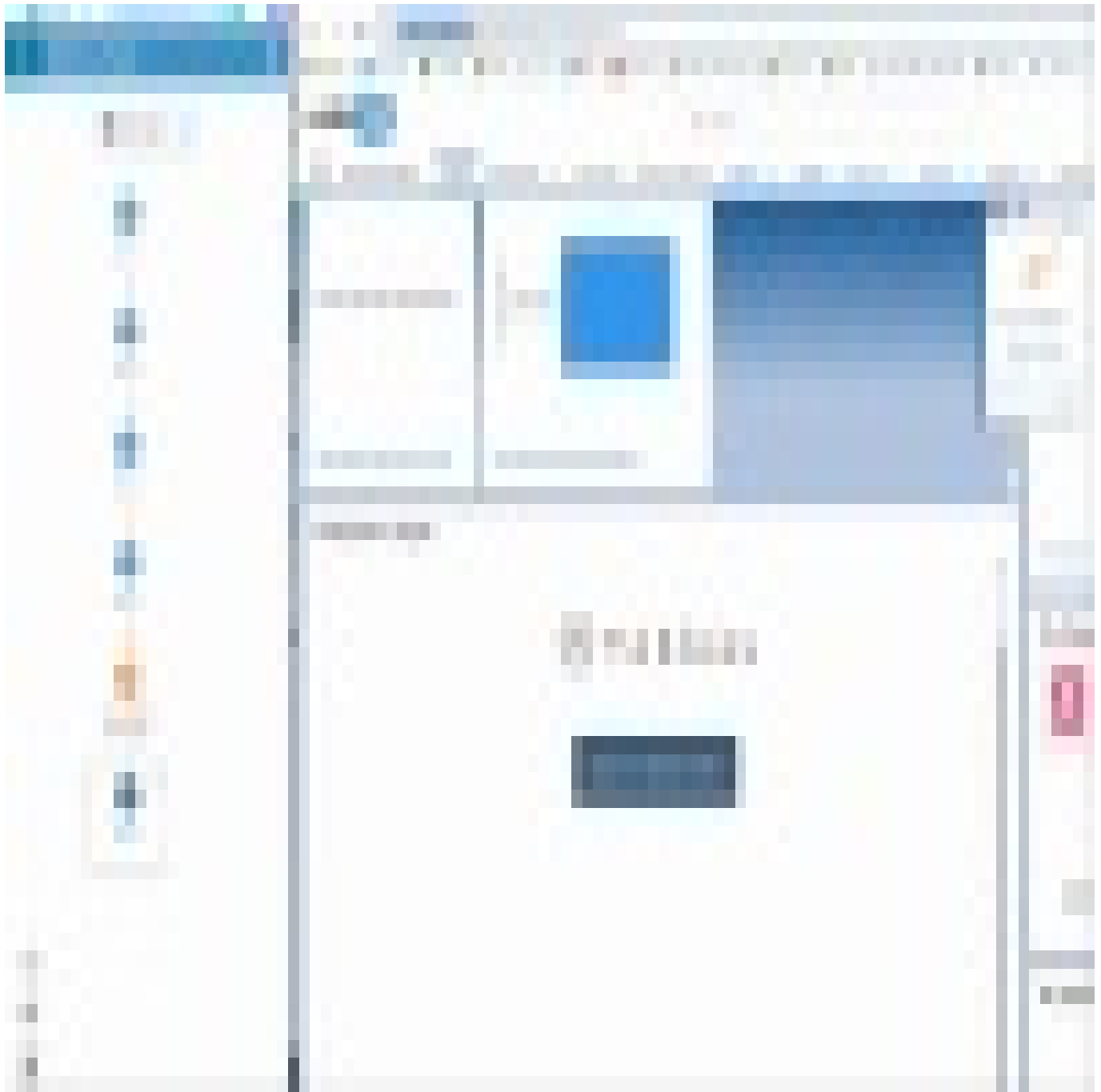
## Alternatives a Switch to Frame Flow Step

In situations where switching to an IFrame or Popup is either difficult or unreliable, we recommend avoiding it altogether. A common workaround is to create a single step around the IFrame that has detailed instructions. Keep in mind that our ultimate goal is to help people through the entire process so having one or two steps listed outside the IFrame may still be just as effective.

## Tip Tuesday Videos

### How to Troubleshoot Switch to Frame steps









To see more Tip Tuesday videos on WalkMe World [click here](#).

## Related Resources

- [Smart Walk-Thru Best Practices](#)
- [Flow Steps](#)
- [Rule Engine](#)