

Switching to Smart Walk-Thrus Cheat Sheet



Smart Walk-Thrus are designed to help you create online guidance faster than ever before. Smart Walk-Thrus have a map view allowing you to quickly visualize an entire process and brand new features that make building complicated processes easier.

If you're transitioning from Walk-Thrus to Smart Walk-Thrus, this article will help you identify features to make the switch more quickly.

You can also find some general information about [Smart Walk-Thrus](#) or [how Smart Walk-Thrus differ from Walk-Thrus](#).

Let User Start From Different Steps

Your users won't always start a process from the home page. For the best user experience, your guidance should be able to recognize where the user is and display only steps that are relevant. Adding these entry points is now easier than ever with Smart Walk-Thrus! Each step can have its own start point instead of adding multiple super steps to accomplish the same goal.



 Walk-Thru Feature	 Smart Walk-Thru Feature
Jump to Steps Multiple Jump to Steps are added to a Walk-Thru and dragged to the top of the list. The List must be in descending order for them to be checked properly.	Start Points Add a Start Point to any step in the process. Each Start Point has its own Rule to help you identify the URL and if the Element for the step is visible. Start Points are checked from bottom to top. Learn about creating Start Points
	Restart Smart Walk-Thru Steps Enable your end-user to go through the same Smart Walk-Thru multiples times so you can reuse the beginning steps. Learn about Restart Smart Walk-Thru Steps

Spotlights

Spotlights are designed to place an overlay on the rest of the screen to bring the selected element to the user's attention. If the elements are overlapping, you should be able to manually move the spotlights within the 'Customize on Screen' menu so that they overlap and allow you to enter the fields.

Automate a Step



Automate specific actions for a user such as clicking on an element or typing in text. You can even open the menu. With Smart Walk-Thrus Consolidated common actions and now you can create custom action with ease.

 Walk-Thru Feature	 Smart Walk-Thru Feature
<p>Self Executing Steps A step is created and then the builder must make the balloon invisible from the Appearance menu and turn on Self Executing Step from Behavior menu. Other automated actions were found in the Super Steps menu, including:</p> <p>Other Super Steps</p> <ul style="list-style-type: none"> • Open the Menu • Redirect • Page Refresh 	<p>Auto-Steps Auto-Steps can perform all manner of element-oriented actions, such as clicking on, hovering over, focusing on, and filling text into an element, or selecting a list value from a dropdown menu. Learn about creating Auto-Steps</p> <p>Page Action Steps Page Actions can perform numerous page-oriented actions, such as opening the Player Menu, refreshing the page, and redirecting to a new page. Learn about creating Page Action Steps</p>

Have Two Steps Appear at the Same Time



While we generally recommend displaying only 1 balloon at a time, there are situations where displaying multiple balloons is recommended. For long forms a balloon is commonly placed at the top of the page with general instructions and a second step is placed at the bottom on the submit button. In the past, multiple balloons were also used to validate individual fields. Today though, we

recommend using SmartTips to validate individual fields.

 Walk-Thru Feature	 Smart Walk-Thru Feature
<p>Multiple Balloons With Multiple Balloon Triggers</p> <p>To create steps that appear together in a Walk-Thru, use the multiple balloon trigger on all the steps that are meant to play at the same time. The last step uses a different trigger for all the steps that play before it. In the step list, steps that play at the same time connected with a link symbol and the final step looks like a normal step.</p>	<p>Peer Steps</p> <p>Peer Steps appear at the same time. The step in the main branch has a unique trigger. Steps that are added as Peer Steps do not have a trigger and appear in a horizontal line in the Map. You can even just drag and drop one step on top of another to create a Peer Step!</p> <p>Learn about creating Peer Steps</p>

Connect to Another Walk-Thru



Creating multiple paths in a Walk-Thru is easier than ever in a Smart Walk-Thru (visit [Creating Alternate Steps in a Walk-Thru](#)), but sometimes you want to connect two distinct processes. This allows you have each process appear in the menu, while at the same time switching a user between Walk-Thrus in a seamless manner.

 Walk-Thru Feature	 Smart Walk-Thru Feature
<p>Branch To Walk-Thru</p> <p>The user first must create the Walk-Thru that should be branched to. Then in a new Walk-Thru a Branch to Walk-Thru Super Step was added with a rule that determined if the user should switch to the Walk-Thru already created. Since Classic Walk-Thrus run in a linear manner, this was commonly use for complex processes.</p>	<p>Connect To Smart Walk-Thru</p> <p>With Smart Walk-Thrus it's much easier to create complex processes. In most situations, you can simply create alternate steps/paths in a Walk-Thru (see below). If two unique Walk-Thrus are needed though, use add a Connect to Smart Walk-Thru and select an existing Walk-Thru.</p> <p>Learn about creating a Connect to Smart Walk-Thru</p> <p>Let WalkMe Decide When To Switch Smart Walk-Thru</p> <p>If you want to use the Rule Engine to decide if the users should connect to another Walk-Thru, add a Split and place the Connect to Walk-Thru in the alternate branch.</p> <p>OR</p> <p>Let Users Decide To Switch Smart Walk-Thru</p> <p>If you want a user to decide if they should switch Smart Walk-Thru, add a link in your balloon that connects to another Walk-Thru. An branch is automatically created in your map.</p>

Note: Only Smart Walk-Thrus may be connected to Smart Walk-Thrus. Currently, you are unable to connect a Smart Walk-Thru to a Classic Walk-Thru



Create Alternate Steps/ Paths in a Walk-Thru

Specific steps may be relevant to only a subset of your users based on a previous selection or something that appears on screen. Smart Walk-Thrus App enables you to create complex processes with alternate steps or complete different paths for your users.

 Walk-Thru Feature	 Smart Walk-Thru Feature
<p>Step Play Rules Alternate steps were added just like other steps, then from the behavior menu a Step Play Rule was created to determine if the step should be played. If several alternate steps were needed then each one needed a Step Play Rule created for it. This makes it more difficult to understand in a linear list and since there are multiple Step Play Rules QA testing is more burdensome.</p> <p>Branch To Walk-Thru Since Classic Walk-Thrus run in a linear manner it's often easier to manage alternate steps by creating a separate Walk-Thru and then using a Branch to Walk-Thru SuperStep to switch to an different Walk-Thru.</p>	<p>Split Flow Step Splits allow you to create alternate steps or completely different paths in a Smart Walk-Thrus. Splits use the Rule Engine to determine if the user should Learn about creating a Split</p> <p>Combining Triggers With Next Whenever you combine a trigger the Next Trigger for a step, such as Click and Next or Type and Text, WalkMe adds an optional branch to your Smart Walk-Thru. You can easily add steps to this branch that appear when the user clicks Next instead of the other trigger.</p> <p>Let User Decide To Split You can create a link in a balloon that allows users to decide if they should change paths. From the Rich Text Editor, link text to another Smart Walk-Thru. This creates a new branch and Connects a Smart Walk-Thru. If you don't want to Connect to that Smart Walk-Thru then delete it from the map and you can still use the new branch to add steps. You can also use BBCode. Just type [trg=1]link name[/trg] into your balloon source to create a new branch</p>


Help Users Fix Errors

It's very common for users to get errors on forms. In these situations we often want to display additional steps to help them fix their errors and to proceed only when they no longer see an error on screen. With the Smart Walk-Thrus App you can easily create a set of steps to appear only when there is an error on screen using an Error Handling Group.

 Walk-Thru Feature	 Smart Walk-Thru Feature
<p>Jump To Step + Steps With Step Play Rules</p> <p>Error handling with Walk-Thrus is done by adding a Jump to step after a user submits a form. The Jump to step has a rule that detects if an error appears on screen. The Jump to Step, jumps to steps created to help the user fix their issue. Each of these steps has a step Play Rule that only appears if no error is visible on screen and must be placed before the step that asks the user to click Submit.</p>	<p>Error Handling Group</p> <p>Error Handling Groups allow you to use the Rule Engine to detect user error on screen. You can then add steps to the Error Handling Group that help the user fix their mistakes. When all steps are played in the group WalkMe check the Error Handling Group Rule again to determine if the user has fixed their errors.</p> <p>TIP: To validate multiple individual fields in a form we recommend using SmartTips.</p> <p>Learn about creating Error Handling Groups</p>

Add Multiple Triggers to a Step

Users may have the option to click more than one element before moving on to the next step. Adding additional triggers will enable the user to make the selection they want without the Walk-Thru stopping. With the Smart Walk-Thrus App creating more than one trigger is easier and more customizable than ever!

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Error Handling Rules

Error Handling Groups allow you to use the Rule Engine to detect user error on screen. You can then add steps to the Error Handling Group that help the user fix their mistakes. When all steps are played in the group WalkMe check the Error Handling Group Rule again to determine if the user has fixed their errors.

TIP: To validate multiple individual fields in a form we recommend using SmartTips.