# 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 <u>Smart Walk-Thrus</u> or <u>how Smart Walk-Thrus differ</u> <u>from Walk-Thrus</u>.

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
<b>Jump to Steps</b> 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.	<b>Start Points</b> 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
	<b>Restart Smart Walk-Thru Steps</b> 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

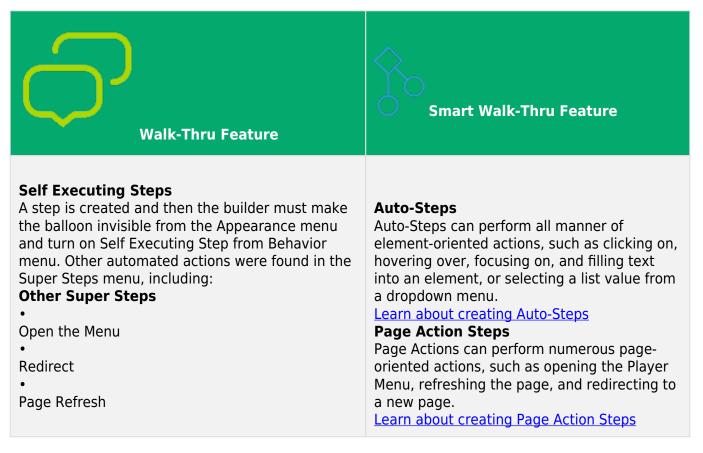


# Spotlights

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.



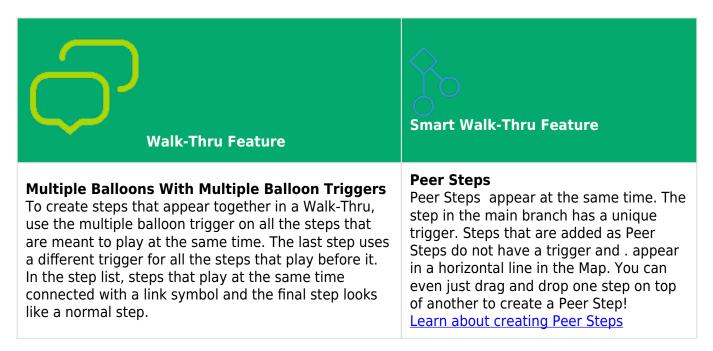
## Have Two Steps Appear at the Same Time

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

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recommend using SmartTips to validate individual fields.



## 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
<b>Branch To Walk-Thru</b> The user first must create the Wall-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.	Connect To Smart Walk-Thru 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. Learn about creating a Connect to Smart Walk-Thru Let WalkMe Decide When To Switch Smart Walk-Thru 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. OR Let Users Decide To Switch Smart Walk-Thru 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.

**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.



**Step Play Rules** 

#### Walk-Thru Feature

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

Since Classic Walk-Thrus run in a linear manner

creating a separate Walk-Thru and then using a

Branch to Walk-Thru SuperStep to switch to an

it's often easier to manage alternate steps by

Play Rules QA testing is more burdensome.

#### Smart Walk-Thru Feature

#### 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

#### **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.

#### 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 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

## Help Users Fix Errors

**Branch To Walk-Thru** 

different Walk-Thru.

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
<b>Jump To Step + Steps With Step Play Rules</b> Error handing 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 place before the step that asks the user to click Submit.	Error Handling Group Error Handling Groups allow you to use the Rule Engine to detect user error on screen. You can then add steps to the Error Handing 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. <b>TIP:</b> To validate multiple individual fields in a form we recommend using SmartTips. Learn about creating Error Handling Groups

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 Handing 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.