

Auto-Steps: Getting Started Guide

Brief Overview

Why make your users complete repetitive tasks when you can simply automate them? With auto-steps, you can easily automate numerous tasks for your users, saving them time, and improving their user experience. This way, your users can focus on what really matters, instead of where to navigate to get to a feature.

With auto-steps, automating multiple steps or an entire process is fast and easy to do. You simply capture the steps as you go. Best of all, there's no coding, API, or backend integration required!

Use Cases

Action-Step use cases include the following:

- Completely automate an end-to-end repetitive process
- Quickly capture multiple Auto-Steps
- Eliminate routine navigation steps with a Smart Walk-Thru
- Automatically perform element-oriented tasks on behalf of your users:
 - **Click** an element
 - **Right Click** a custom Context ("Right Click") Menu
 - **Hover** over an element
 - **Focus** on a field (put the cursor into the field)
 - **Select** a list value from a dropdown menu
 - **Fill Text** into an element

How It Works

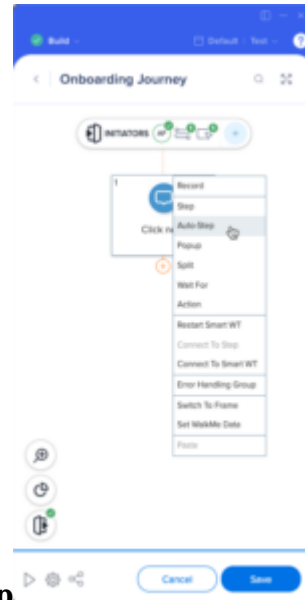
You can add auto-steps anywhere in a Smart Walk-Thru. Auto-steps complete actions on behalf of the user, like clicking on a link or button, typing into a field, or hovering over a menu. You can even quickly toggle between regular steps and auto-steps as you record a process.

Tip

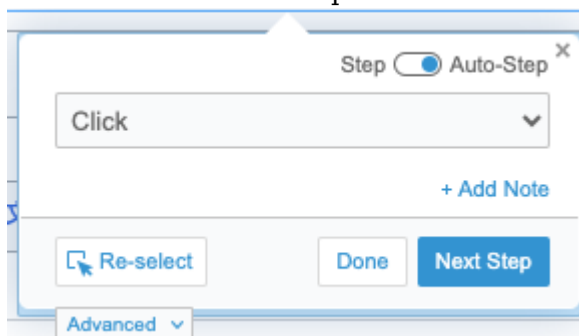
A Smart Walk-Thru that is made up entirely of auto-steps can be played as an [Automation Process](#), which allows it to run simultaneously with visual Smart Walk-Thrus.

Create an Auto-Step

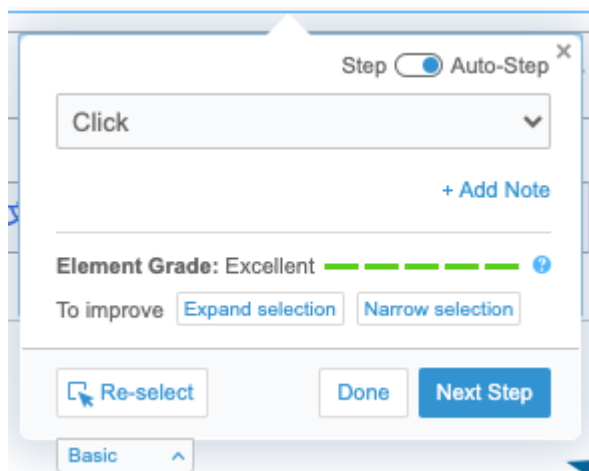
1. In the WalkMe Editor, create a new Smart Walk-thru or open an existing one that you want to add auto-steps to



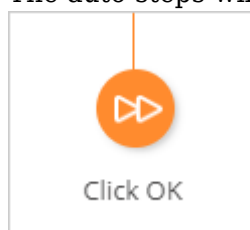
2. Click the **orange +** button and select **Auto-Step**.
3. Capture the element you want the auto-step connected to
4. A capture box will appear with the automatic action selected by default based on the element type
 - Action type options vary depending on the element selected
 - Click **Re-select** to re-capture an element



5. The **Advanced** view lets you see and improve the element grade



6. Once finished capturing the step, click **Done** or **Next Step** to return to capture mode
7. After you finish adding your steps, click **Save**
8. The auto-steps will appear in your Smart Walk-Thru with an **orange auto play** icon



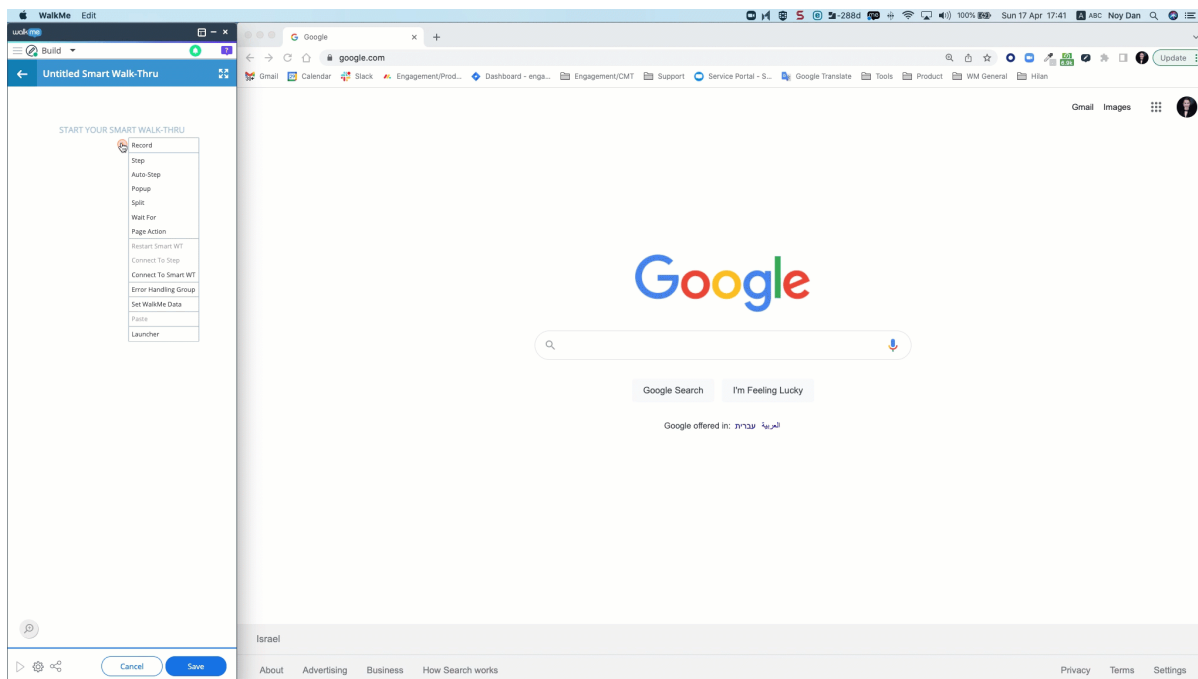
Note

All orange steps are invisible to your users.

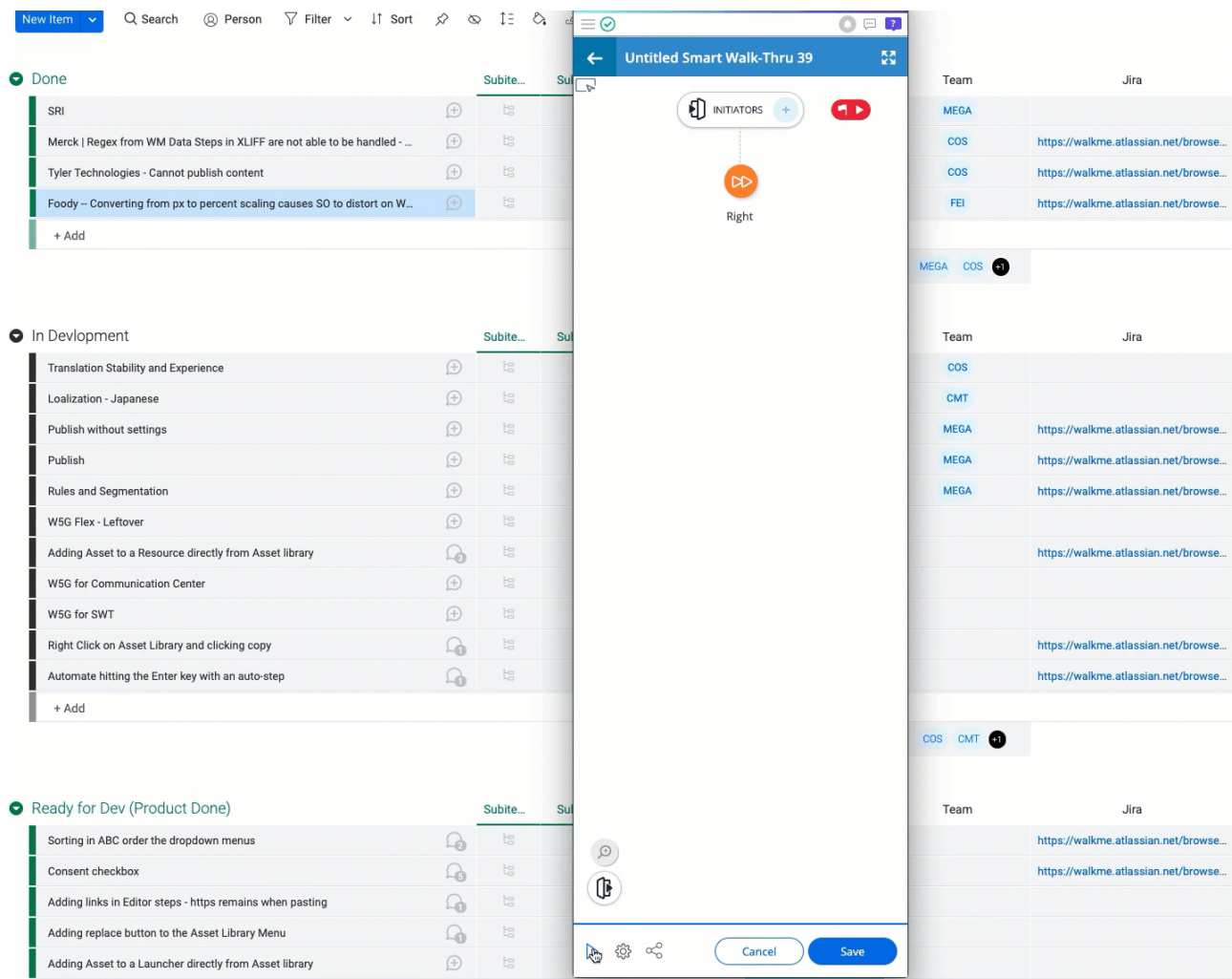
Automatic Actions

Multiple action types are supported for auto-steps. Below are some common examples.

- Have WalkMe hit **Enter** to complete a search after filling text
 1. Create a **Fill Text** auto-step
 2. Go to the **Interaction** tab of auto-step settings in the editor
 3. Select: **Keep the cursor in the text field** and **Automatically press enter after filling the text**



- Capture context menus with the **Right Click** action



Note

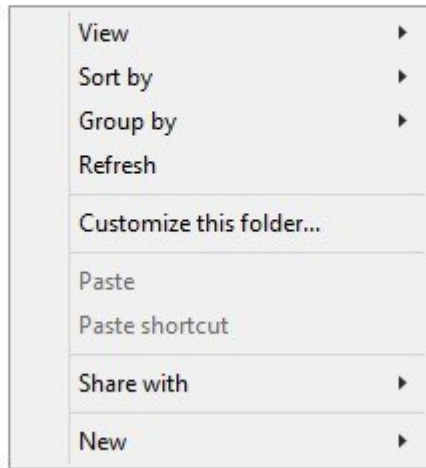
Only custom Context Menus are supported, default Web Menus cannot be captured.



Searches



Videos



Display During Automation

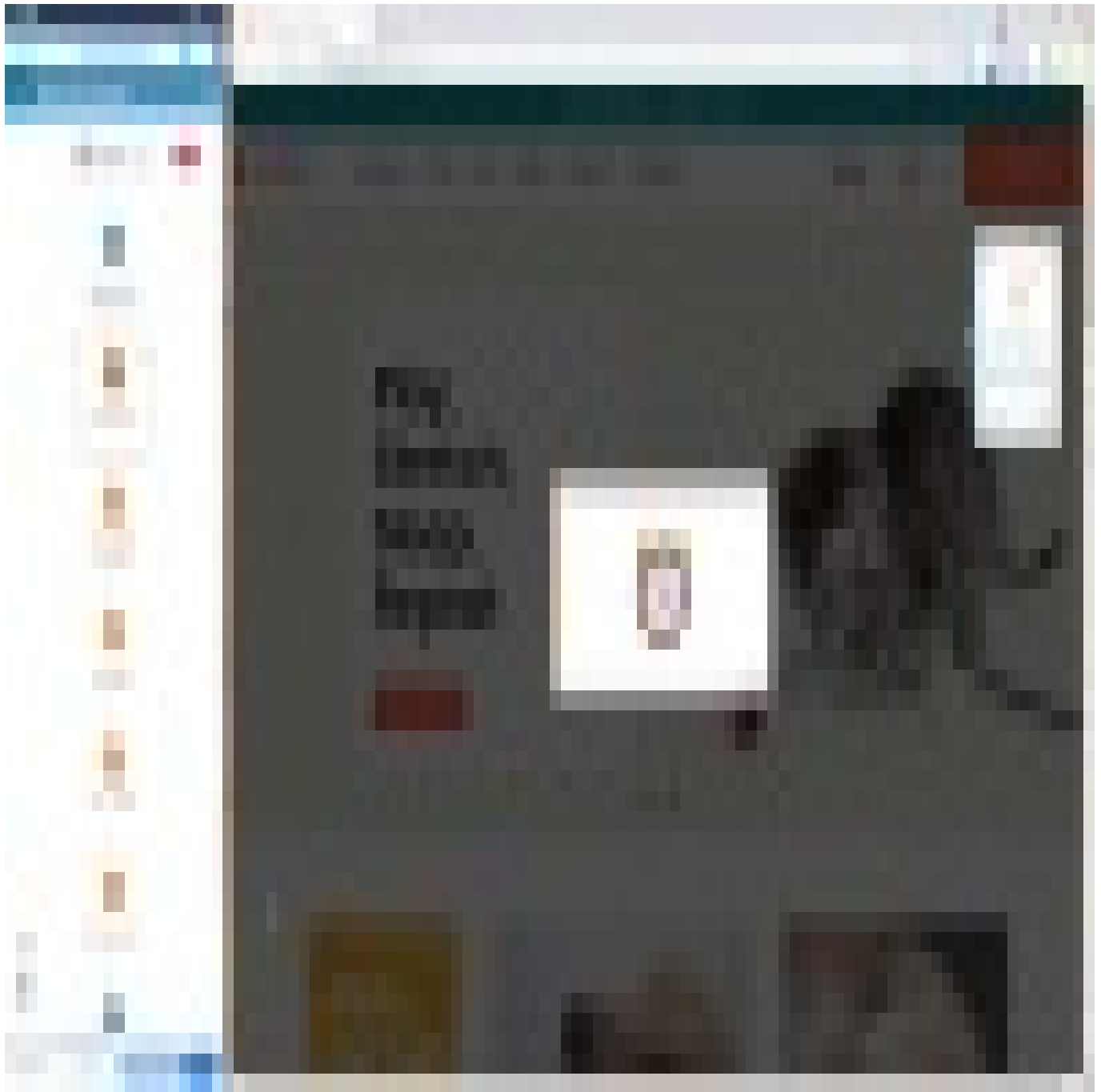
- Add a popup, which will remain on screen and notify users that an automation is in process

Display During Automation ☒ ?

Display this Popup Step to notify users that an automation is in process.

This feature is available only when there are Flow Steps, including Auto-Steps and Wait For steps, following this Popup.

☒ Close after playing (optional): 2 - Wait For 5 Seconds` ▼





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Auto Fill Steps

- Add or remove elements using **Auto Fill** steps



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Convert Existing Steps to Auto-Steps

To learn how to convert current steps, please refer to the article below.

[Convert Smart Walk-Thru Steps to Auto-Steps](#)

Ripple Effect

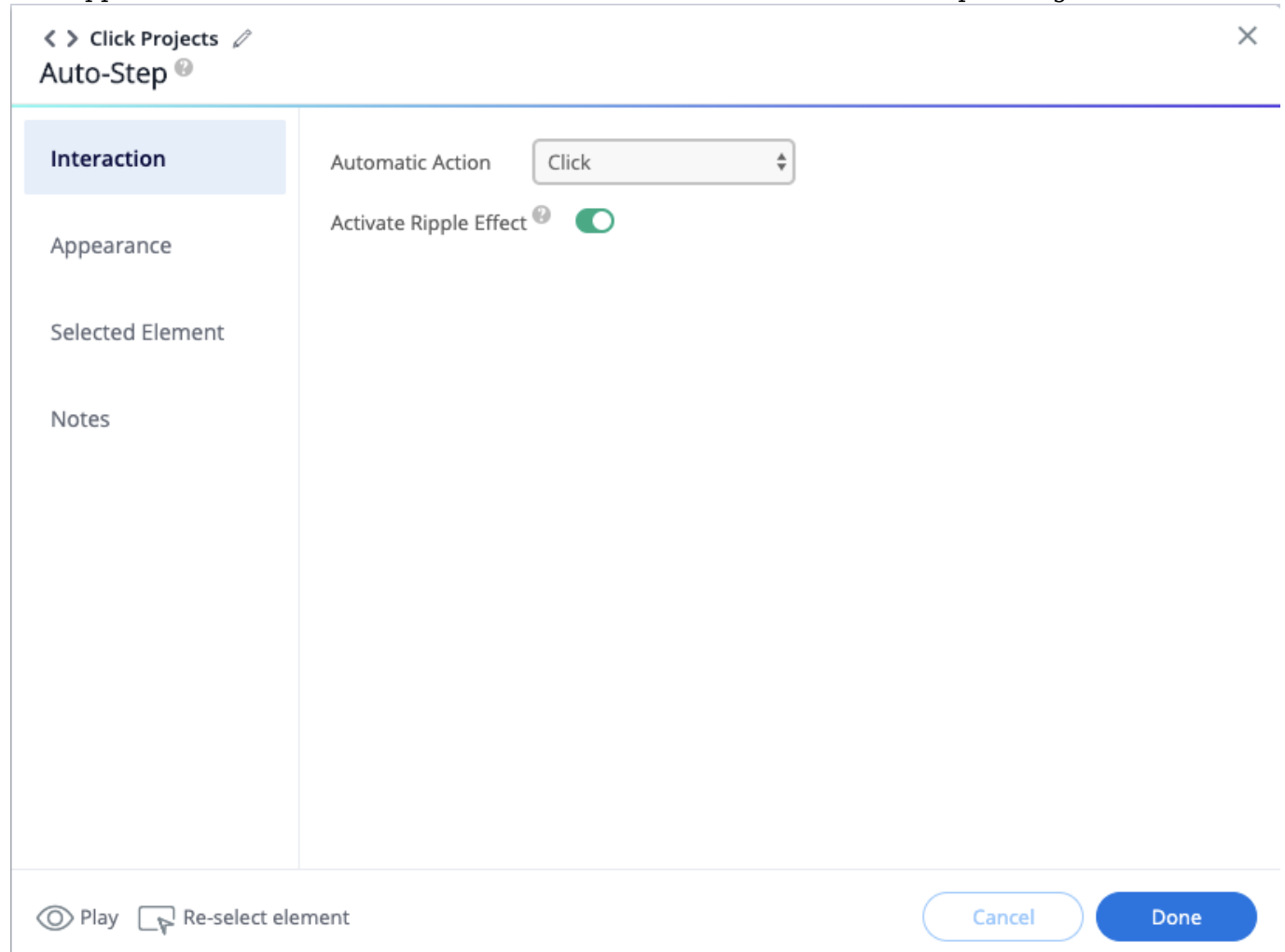
By default, a ripple effect will show when an auto-step has been clicked. The ripple effect will be a blue circle with a thin line, but it can be customized to match your design.

Apple Email Automation Color Changing

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The ripple effect can also be disabled in the **Interaction** tab of the auto-step settings.



The screenshot shows the 'Auto-Step' settings dialog in the WalkMe interface. The dialog has a title bar with '< > Click Projects' and a close button. Below the title bar is a sidebar with four tabs: 'Interaction' (selected), 'Appearance', 'Selected Element', and 'Notes'. The main content area of the 'Interaction' tab contains two settings: 'Automatic Action' with a dropdown menu showing 'Click', and 'Activate Ripple Effect' with a toggle switch that is currently turned on (green). At the bottom of the dialog, there are two buttons: 'Cancel' and 'Done'. On the left side of the bottom bar, there are icons for 'Play' (an eye) and 'Re-select element' (a cursor pointing to a square).

Technical Notes

- Automatic actions will only show available options depending on the element selected
 - For example, a button will not have the option of **Fill Text**
- When using **Fill Text** automatic actions, only filling the text of an element is supported, it does not trigger any site functionality that is usually triggered when a user types in an input field
- Text length is limited to 200,000 characters
- Only one Smart Walk can auto play at any given time
 - If you have multiple Smart Walk-Thrus set to auto play, review their engagement rules to ensure they are not able to play at the same time

- Supported HTML input type attributes include numerical/text values
 - Meaning, `<input type="time">` will be supported by Fill Text Auto Step, but `<input type="button">` will not
- **Click** automatic actions don't work with "Select element" type dropdowns
 - The **Select List Value** automatic action can be used instead

< >

Click

Auto-Step

×

Interaction

Appearance

Selected Element

Notes

Automatic Action

Select List Value

Activate Ripple Effect

Value

Play

Re-select element

Cancel

Done