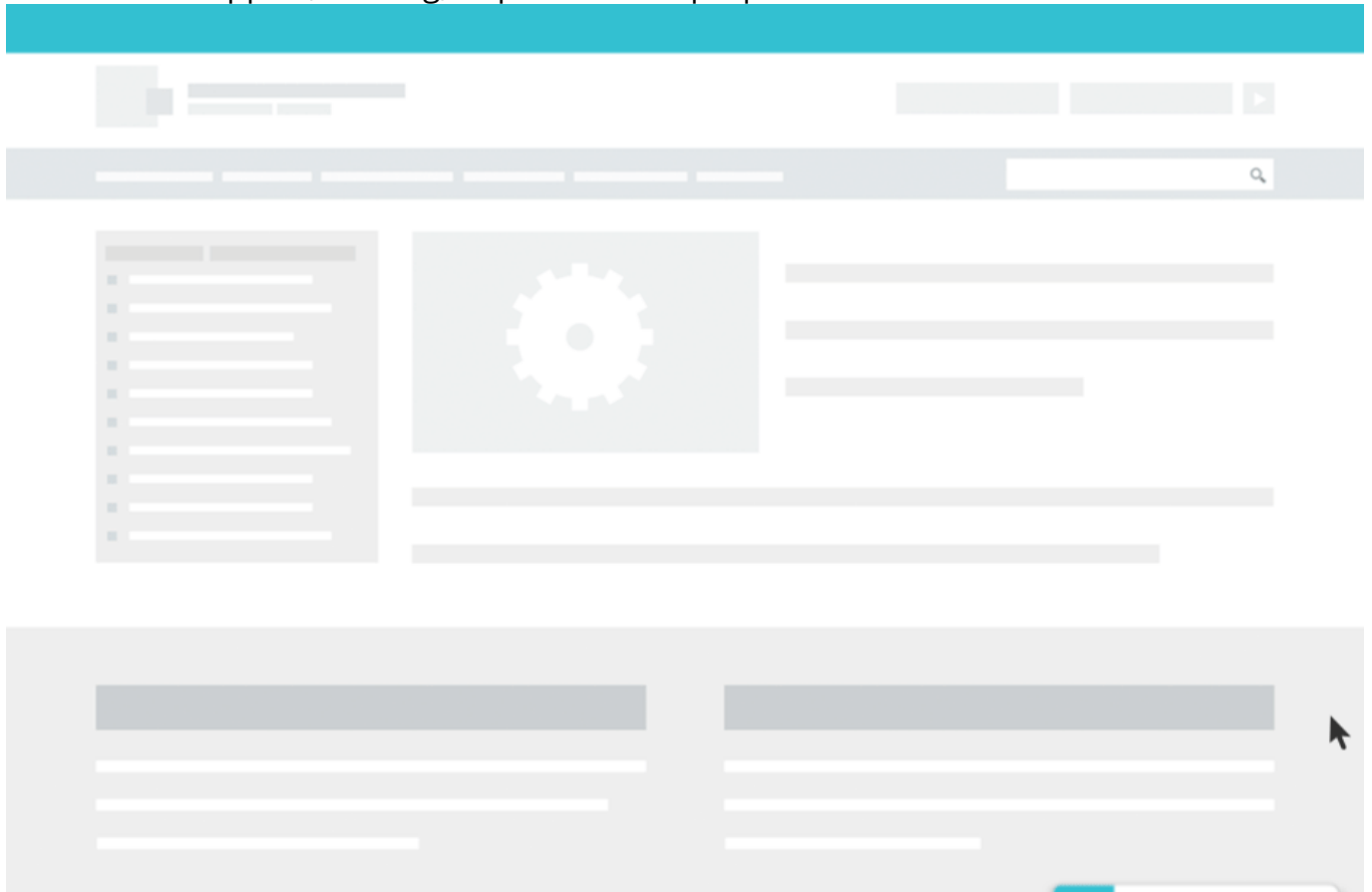


# Walk-Thrus

Walk-Thrus guide users through an online process start to finish. Clear and straightforward directions are given in tip balloons overlaid on the screen. Walk-Thrus can be highly effective for support, training, or promotional purposes.





This article is about Walk-Thrus. Read the Smart Walk-Thru version of this article. [What's the difference between Walk-Thrus and Smart Walk-Thrus?](#)

[Click here for instructions on creating your first Walk-Thru.](#)

## The Short Version

If there is an online multi-step process that you would like to help users with, consider using a Walk-Thru. Walk-Thrus are similar to GPS Navigation: your GPS will tell you “turn right here...turn left here” to guide you from your origin to your destination. Similarly, a Walk-Thru will direct a user “click here...enter text here” to guide the user step-by-step all the way through a business process.

For example, a company may introduce a new process for requesting vacation days in its HR software. Employees need training on requesting leave and managers need training on approving requests. Separate Walk-Thrus could be created detailing the steps required to complete the process and segmented for the different groups. When a user plays the Walk-Thru, it will teach them how to complete the process in real time. They can come back to the Walk-Thru at any time if they need a refresher on how to do it.

Here are a few more examples of how Walk-Thrus can be used:

- Feature Adoption: Help Customer Success Managers shorten the time it takes customers to adopt a new software, boosting customer experience and loyalty.
- Onboarding and Training: Onboard and train employees faster by providing constant and relevant guidance on screen. Walk-Thrus allow employees to learn as they work so no time is wasted.
- Support: Enable customers to provide self-service support by directing them to a relevant Walk-Thru, providing an engaging, effortless and personalized online experience.

## How it Works

Walk-Thrus can be started by your user in a number of ways:

- Player Menu: The user can search or browse the list of published Walk-Thrus in

the Player Menu and launch one by clicking on the title

- Launcher: The user can click a Launcher (like a quickstart button placed anywhere on your site) to start a Walk-Thru
- ShoutOut: Users can be given the option to play a Walk-Thru by clicking on an action button in a ShoutOut
- AutoPlay: Walk-Thrus can be set to launch automatically under certain conditions

[Want to know more about Engaging your users? Click here.](#)

Before a Walk-Thru will play, WalkMe will check the [Segmentation Rule](#). Once this rule is confirmed as true, WalkMe will search for the element of the first Step. [Goals](#) and [analytics data](#) start to be collected as soon as the Walk-Thru is loaded.

Once the element has been found, the Walk-Thru will play. The Walk-Thru will continue to guide the user until the last step is played and triggered.

## Element Grade

Check out the article on Precision to [learn more about Element Grade](#).

## Walk-Thru Interaction

In the Interaction tab, you can modify text, balloon position, and triggers.

- Title: Edit the main instruction for the user
- Text: Include additional instructions or details for the step if desired
- Trigger: Determine what action will move the Walk-Thru onto the next step. Triggers drive the Walk-Thru forward and make it interactive.
  - Click: User clicks the element
  - Next: User clicks a Next button on the balloon. The following triggers can be combined with the Next trigger by pressing Control on a PC (or Command on a Mac):
    - Click + Next: Triggers the following step by clicking the element OR clicking the Next button
    - Text + Next: Triggers the following step by typing into element OR clicking the Next button
  - Text: User enters text in the element
  - Hover: User hovers over the element
  - Multiple Balloon: The following step is also triggered; ie both balloons display at the same time
  - Delay: The next step will play automatically after a set number of seconds
  - Refresh: Page is refreshed

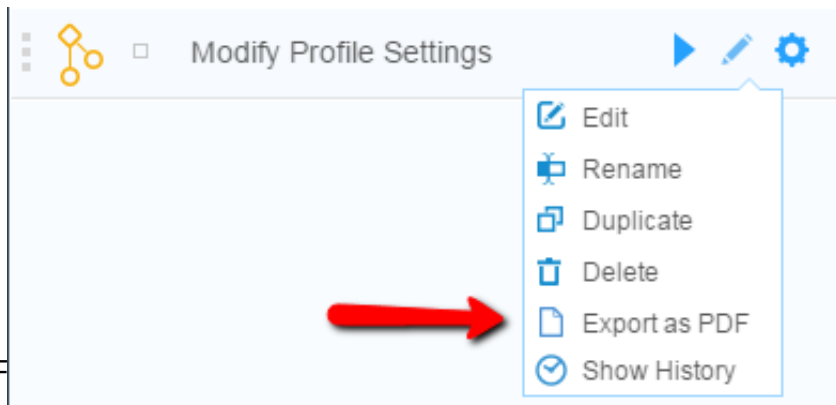
- Drop-Down Menu Triggers: The following triggers only appear as options when a drop down menu element is selected :
  - Select Any: Any item in a drop down menu is selected
  - Select Specific: A specific drop down item is selected
  - Select Any + Next: Triggers the following step by selecting any item in a drop down menu OR clicking the Next button
  - Select Specific + Next: Triggers the following step by selecting a specific item in a drop down menu OR clicking the Next button
- Table Elements: The following triggers only appear as options when a Table is selected
  - Select Column
  - Select Row
  - Select Cell
  - Select Table
- Balloon Position: Change where the step balloon appears in relation to the element selected (Further customize position in Appearance > Position)
- Add More Triggers: Add additional elements on the screen that can trigger the step.
- Rich Text Editor: Further customize the balloon
  - Change font style, color, and size for the header and content of the balloon
  - Add a hyperlink
  - Add bullets in the content field
  - Insert a Walk-Thru in the content field
  - Insert an image in the content field (using the URL)
  - Insert a video from YouTube, Vimeo, Wistia, or Flash in the content field (using the URL)
  - Insert an iFrame to host content from another domain

[Read about the other categories in the Step Options Menu.](#)

## Export a Smart Walk-Thru as a PDF

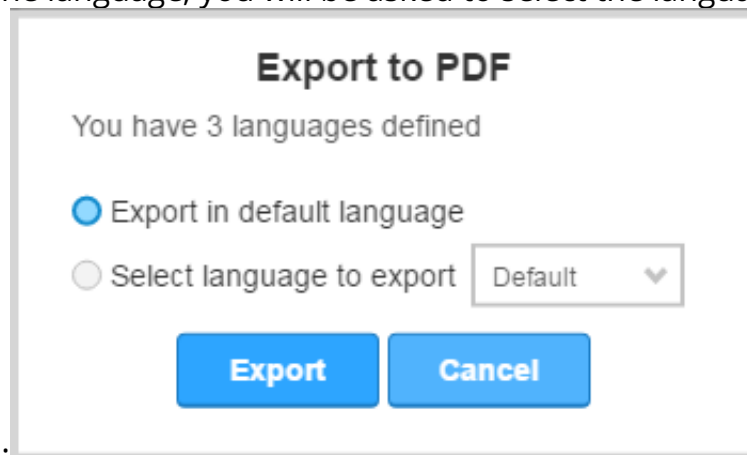
If you would like to show a Smart Walk-Thru's flow from a bird's eye view or train employees on your Smart Walk-Thru building technique, you can now export your Smart Walk-Thru steps as a PDF. To do so, follow these steps:

- Hover over the pencil icon on a Smart Walk-Thru or Walk-Thru item



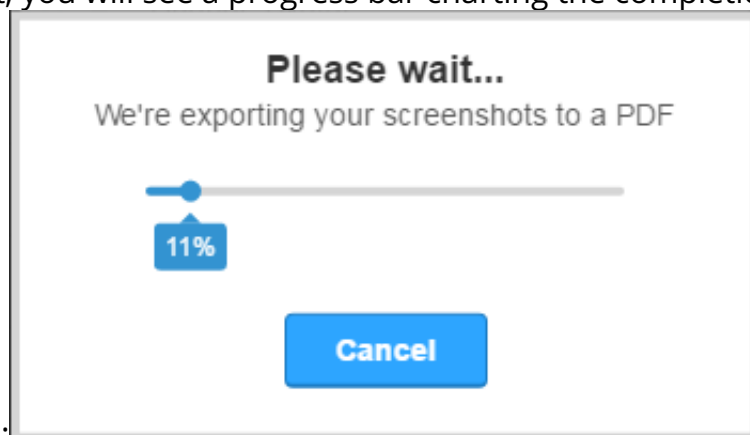
- Select Export as PDF

- If you build in more than one language, you will be asked to select the language



you would like to export in:

- At this point, you will see a progress bar charting the completion of your PDF's



compilation:

- Once the compilation is complete, you will be prompted to select where the PDFs file should be stored on your machine
- Select a location on your machine and download the file to that location

Note: The Capture Screenshots setting under the General tab must be turned on for Export to PDF to work.

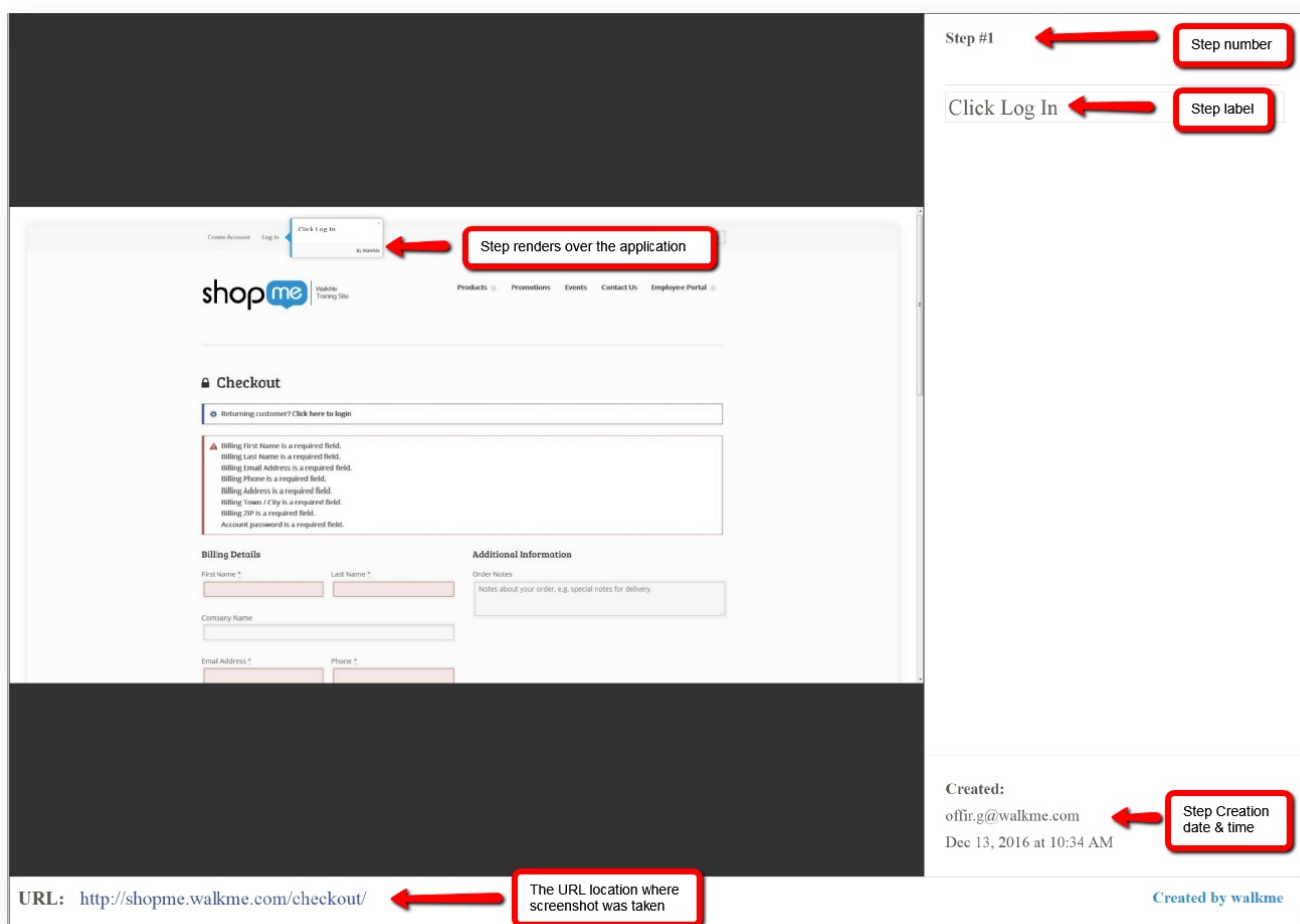
## The Structure of the PDF

Each page of the PDF shows a Smart Walk-Thru step over a screenshot of the app page on which the step was captured. Each step is situated next to its selected element.

Additional features of the page structure include the following:

- The step's chronological number
- The step's label
- The step's creation date and time
- The URL location where the screenshot was captured

See the below screenshot of the PDF page structure:



The screenshot illustrates the structure of a PDF page for a Smart Walk-Thru step. The main content area displays a screenshot of the 'shopme' checkout page, with a red box highlighting the 'Click Log In' button and the text 'Step renders over the application'. The right-hand sidebar contains the following elements:

- Step #1**: A red arrow points to the text 'Step #1'.
- Step number**: A red box highlights the text 'Step number'.
- Click Log In**: A red arrow points to the text 'Click Log In'.
- Step label**: A red box highlights the text 'Step label'.
- Created:** The text 'offir.g@walkme.com Dec 13, 2016 at 10:34 AM' is displayed, with a red arrow pointing to the text 'Step Creation date & time'.
- URL:** The text 'http://shopme.walkme.com/checkout/' is displayed, with a red arrow pointing to the text 'The URL location where screenshot was taken'.

At the bottom right of the sidebar, the text 'Created by walkme' is visible.

## Related Resources



- [How to Create a Walk-Thru](#)
- [Understanding your element](#)
- [Engaging your Users](#)
- [Targeting specific users using Segmentation](#)
- [Track the success of a Walk-Thru](#)
- [Analyze your Walk-Thru Data](#)
- [Other Walk-Thru Settings](#)