

What is Dynamic Text?

Brief Overview

Dynamic Text allows you to customize text used by WalkMe for different features. Dynamic text is based on end-user information, and allows you to personalize a ShoutOut or balloon with a user's name, or even change text that's auto-filled for a user using an automated process.

You can create Dynamic Text with the Rich Text Editor for Walk-Thrus/Smart Walk-Thrus, ShoutOuts, SmartTips, and Surveys, using variables, cookies, WalkMe Data, and jQuery. You can also manipulate the pulled values using regular expressions (AKA regex—To learn more about regex, please visit our article [What is Regex?](#)).

When Dynamic Text is used with a WalkMe item, WalkMe will look for the value identified. Once the value is found, WalkMe will put it into the WalkMe item (if used for visual display), or into the automated action (if used for automation).

Use Segmentation to optimize the impact of Dynamic Text by making these actions contextual and targeted to the right audience.

Dynamic Text supports the following dynamic data-types:

- Variables;
 - [var]variableName[/var].
- Cookie;
 - [cookie]cookieName[/cookie].
- WalkMe Data;
 - [wm-data]keyName[/wm-data].
- jQuery.
 - [jquery]jQuerySelector[/jquery].

Please note:

ShoutOuts created using the Visual Editor do not support Dynamic Text with BBcode

Use Cases

Dynamic Text use cases include the following:

- **When used for visual display:**
 - Add a user name to ShoutOuts or balloons to make them more personal;
 - Convert trial customers by informing them of how many days are left on their trial accounts;
 - Upsell users who are about to reach the limits of their current plans;
 - Add a user's name to a reminder message for daily or weekly tasks in your system;
 - Inform users of their current balance in your system and when their next payment is due.
- **When used for automation:**
 - Save users time by eliminating the need to enter the same information on multiple forms;
 - Reduce errors that occur when users manually input information that can instead be taken automatically from an existing field or location;
 - Avoid asking users to type in complicated codes and ID numbers;
 - Shorten the number of steps in a process.

The Elements of Dynamic Text

BBCode

The Rich Text Editor uses BBCode to format text. When adding Dynamic Text, BBCode will appear in your WalkMe item until you play or preview that item. You can add/edit BBCode for Dynamic Text without opening the Rich Text Editor.

Variables

To use variables with Dynamic Text, talk to your web developer about which variables are available for WalkMe to use. The variable(s) must be available on the window object for WalkMe to access them. [Learn more about variables here.](#)

Cookies

Cookies are small pieces of text that websites send to web browsers, and they are stored in your end-users' terminals. Using your web browser's console, you can look at the names and values of different items saved and usable by Dynamic Text. Consult your IT personnel to inquire about your available cookies. [Learn more about cookies here.](#)

WalkMe Data

Much like cookies, WalkMe data is stored in your end-users' terminals. Unlike cookies, you can create and configure WalkMe data and use it in the WalkMe Rule Engine. [Learn more about WalkMe data here.](#)

jQuery

Use Javascript's jQuery library to pull values from a web-page's HTML. To learn how to use jQuery selectors to pull an HTML element's value, check out the jQuery course at the [Digital Adoption Institute](#). Additionally, [learn more about jQuery here.](#)

Learn about using Dynamic Text for [visual display](#) or for [automation](#).