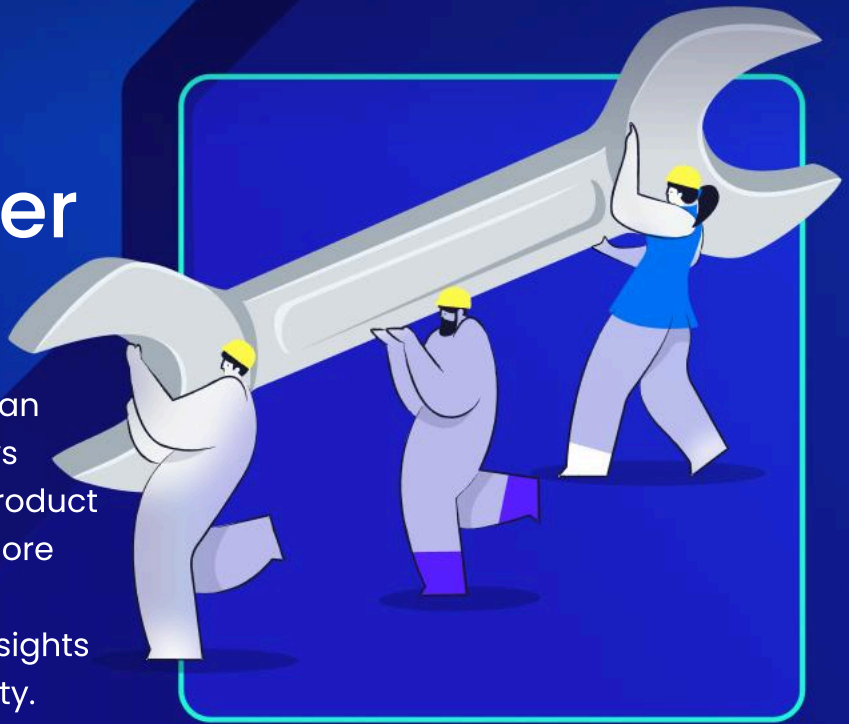


WalkMe Builder Tips & Tricks

Whether you're new to WalkMe or an experienced builder, there's always more to discover. We asked our product experts to share their top tips. Explore four guides from our Customer Education team, plus customer insights from the WalkMe World Community.



Right click tip

Context:

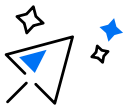
When building and testing WalkMe content, you must mimic end user actions—often repeating processes, creating dummy data, and deleting information.

Solution:

Instead of clicking an element on the page to trigger a step within a Smart Walk-Thru, use a right-click.

How to do this:

When testing a Smart Walk-Thru, right click an element on the screen to “trick” WalkMe into thinking you are clicking the element just like an end user. This will act as a click trigger, and WalkMe will play the next step in your flow.



Invisible Launcher

Context:

You would like for a specific message to appear every single time users try to click a certain button on the page or would like to block users from moving forward in a process if they haven't completed it properly.

Solution:

Cover up a button (or other site element) with an Invisible Launcher. These are not visible to the end user and act as a checkpoint. When users unknowingly click the Launcher, it activates additional guidance with WalkMe.

How to do this:

- 1 Create a new Launcher.
- 2 Attach it to the relevant element using the WalkMe element selector.
- 3 Position the Launcher to appear directly on top of the element so it "blocks" users from clicking the element. Make sure the Launcher is big enough to cover the entire element, so you may need to adjust the size.
- 4 Adjust the design of the Launcher so it is "invisible." Click the ghost icon to make it transparent with just one click!
- 5 Set the Launcher's action to trigger a ShoutOut, Smart Walk-Thru or other WalkMe item that provides additional information or prompts users to confirm their intent.
- 6 If needed (this is usually the case), add a Display Condition to the Launcher. Use the Condition Builder to let WalkMe know when the Launcher should appear.
- 7 If adding a Display Condition, activate the "Removal Behavior" setting so the Invisible Launcher will appear or disappear depending on the user's action.



PRO TIP:

Make the design fully seamless by customizing the cursor behavior to prevent the hand icon from appearing over the invisible element when a user hovers their cursor over it.



Logic rules

Context:

Use WalkMe Logic Rules to validate dynamic input values and guide users based on real-time data like dates, numbers or monetary values.

Solution:

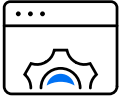
WalkMe's number/date comparison rules (also known as Logic Rules) allow you to compare values using simple equations.

How to do this:

- 1 First, create a Dynamic Text Attribute for each relevant value in the platform.
- 2 When using the Condition Builder to create rules for, say, a Validation SmartTip, select the Number/Date Comparison rule type in the dropdown.
- 3 In the rule's value field, use the @ symbol to input the relevant attribute. Then, use the appropriate comparator or other symbol (noted below) to describe the relationship between the values. If needed, use the @ symbol to add another dynamic value you might be comparing the first one to.
- 4 Now, WalkMe is comparing these dynamic values in real time based on the parameters you provided to determine whether content should show for an end user.

Logic Rules follow a simple structure:

- Comparators: `==`, `!=`, `<`, `>`, `<=`, `>=`
- Arithmetic: `+`, `-`, `*`, `/`
- Time constants like `today`, `days`, `weeks`, even `@DueDate - today <= 5days` for deadline-based logic



Template automation

Context:

There's a text input field users must type in a specific set of key details every time the field is filled out.

Solution:

Auto Play a Smart Walk-thru on the relevant page to auto fill a text-based template, prompting users for specific information.

How to do this:

- 1 Create a new Smart Walk-Thru.
- 2 Add an Auto Step, and select the relevant text box as your element.
- 3 From the automation type dropdown, select "Fill Text" as the automated action, and add in the template questions. Save the Smart Walk-Thru.
- 4 Set up the Auto Play rules. Within the Smart Walk-Thru, head to the Initiators tab. Use the Condition Builder to set up the Auto Play to ensure that each time users get to the page, the template will automatically fill in.



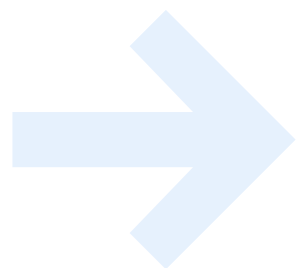
PRO TIP:

We recommend putting each question on its own line so users can easily type in the information.



Tips from the WalkMe World Community

We asked members of the [WalkMe World Community](#) for their best DAP tips and tricks, and these were some of our favorite submissions!





*Every story you tell needs a beginning and it's a better experience all around if that beginning is quantifiable. Collect baseline data – the coming months and years will prove difficult without it. When you set up a system, **establish Engaged Elements (or tracked events)** and use the resulting data to inform your priorities moving forward.*

Heather Wurtz, [insightsoftware](#)



Having an IDP integration is a major time saver for building segments for WalkMe content.

Amanda Albers, [Blattner Company](#)



*Whenever someone contacts me for help, my first question is always “**What did the Flow Tracker say?**” In our internal community, I push the Flow Tracker every chance I get. I also show people how to clear their WalkMe data, how to test out CSS changes, and how to test their conditions – all from the Flow Tracker.*

Dan Linsky, [Accenture](#)



Why we love these tips:

Work smarter, not harder! Don't spin your wheels wondering where to start with your WalkMe build, how to source the right user data for segmentation, or how to test and fix your content once it's created. WalkMe has the tools you need in order to successfully plan and execute your solutions.

“

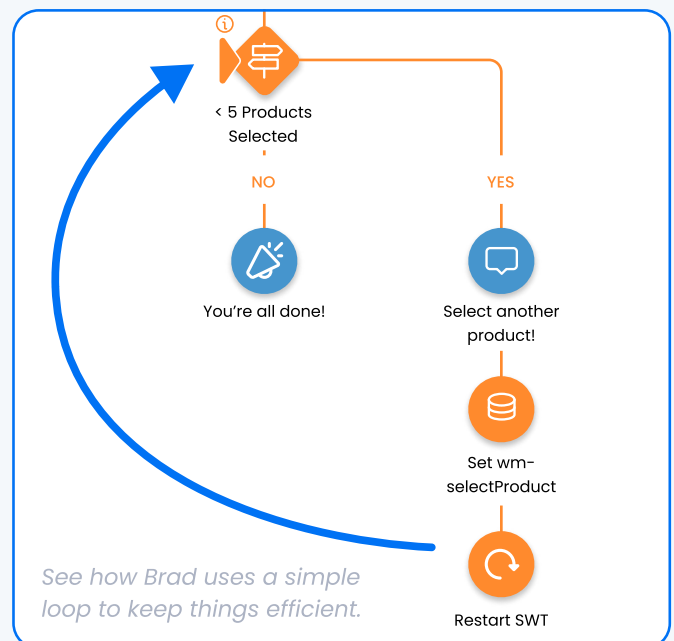
Use Connect To Smart Walk-Thru steps for repeated steps. Many applications will have side-bars that expand and collapse, sub-menus that expand and collapse. Many tasks will have repeated steps like "First select your customer". When building out WalkMe content for your site, repeated steps like these can be built and validated **ONCE** and then used as "functions" inside of other Walk-Thrus. **This minimizes maintenance and makes building out new content much faster.**

Jeff Mayhugh, JMayhugh Consulting

“

One trick that has helped streamline Smart Walk-Thru builds is the ability to use a Set WalkMe Data step, a Restart SWT step, and a Start Point based on that WalkMe data to **loop portions of a single SWT**. This definitely streamlines builds and keeps the number of items in the Editor to a minimum.

Brad Harmon, DMSi Software



Why we love these tips:

By identifying and eliminating repetition from your Smart Walk-Thrus, you'll not only save yourself valuable time while building, but you'll minimize future time spent reviewing and maintaining your content as well.



Use Folders & Color Tags to stay organized. As your library of content grows, keeping things clean is key. Use Folders to group related content (like all onboarding flows, error fixes, or training assets) and Color Tags to flag status—e.g., green for live, yellow for in QA, red for deprecated. This helps you **find assets easier, enhance team collaboration and reduce the risk of editing or publishing the wrong item.** Bonus: Add a “_TEMPLATE” folder for reusable content you clone regularly.

Nick Baca, UMB Bank



To save my sanity about which ShoutOuts I have scheduled for which groups, I add them to my Outlook calendar as all day events. That way I can **quickly see at a glance what's already scheduled** and what upcoming availability I have to schedule new ShoutOuts when someone reaches out. (I'm also not afraid to tell people NO if we have too much going on already, don't want to annoy the masses!)

We have three main groups, and I don't like to schedule more than two per group at the same time. I use Outlook Categories to quickly see the colors too. Also nice that if you don't publish them ahead of time, you get a quick ding to remind you in the morning! Lifesaver!

Christi Rosa, W.L. Gore & Associates



Why we love these tips:

Keeping your DAP initiatives organized, both inside and outside the WalkMe platform, helps foster effective collaboration and keep the end-user experience at the forefront.



*Always have a useful demo at hand that highlights the benefits of using WalkMe to achieve an end goal, **as well as a story** to align the tool to your company needs.*

Felicia Loykowski, Xceptor Ltd



Why we love this tip:

Building your content is just part of the journey! Without an effective communication and rollout strategy, end users may struggle to understand and adopt your DAP solution. But, with the right tools, you can communicate and demonstrate the value of what's possible with WalkMe. Check out our [Champion Toolkit](#) for materials designed to help you advocate for and expand your DAP program. Explore the [WatchMe Build](#) recordings in the WalkMe Community for more builder tips.

About WalkMe

WalkMe, an SAP company, pioneered the world's leading Digital Adoption Platform, helping organizations navigate the change brought on by technology across any application or system. Leveraging over a decade of experience, WalkMe's platform integrates generative AI to deliver proactive, accessible, and actionable insights. Our context-aware solutions guide users through any workflow, identifying and resolving digital friction to ensure seamless execution of critical processes across all departments. Trusted by global leaders like IBM, Nestlé, ThermoFisher Scientific, and the U.S. Department of Defense, WalkMe empowers organizations to maximize software ROI and drive people-centric digital transformation.

Visit: www.walkme.com

WalkMe is successfully deployed at:

