

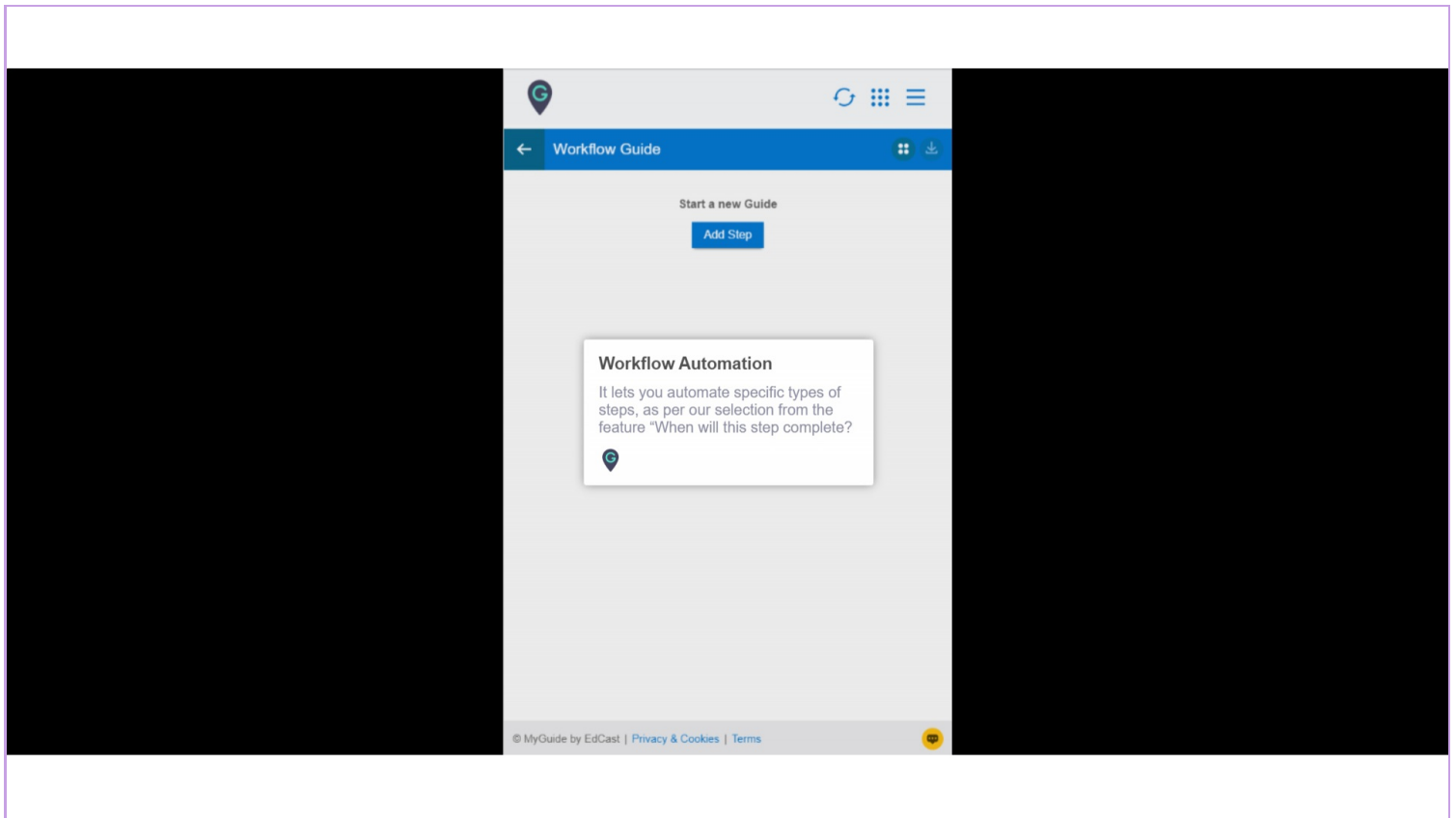


How to Automate a Workflow Guide

Step: 01

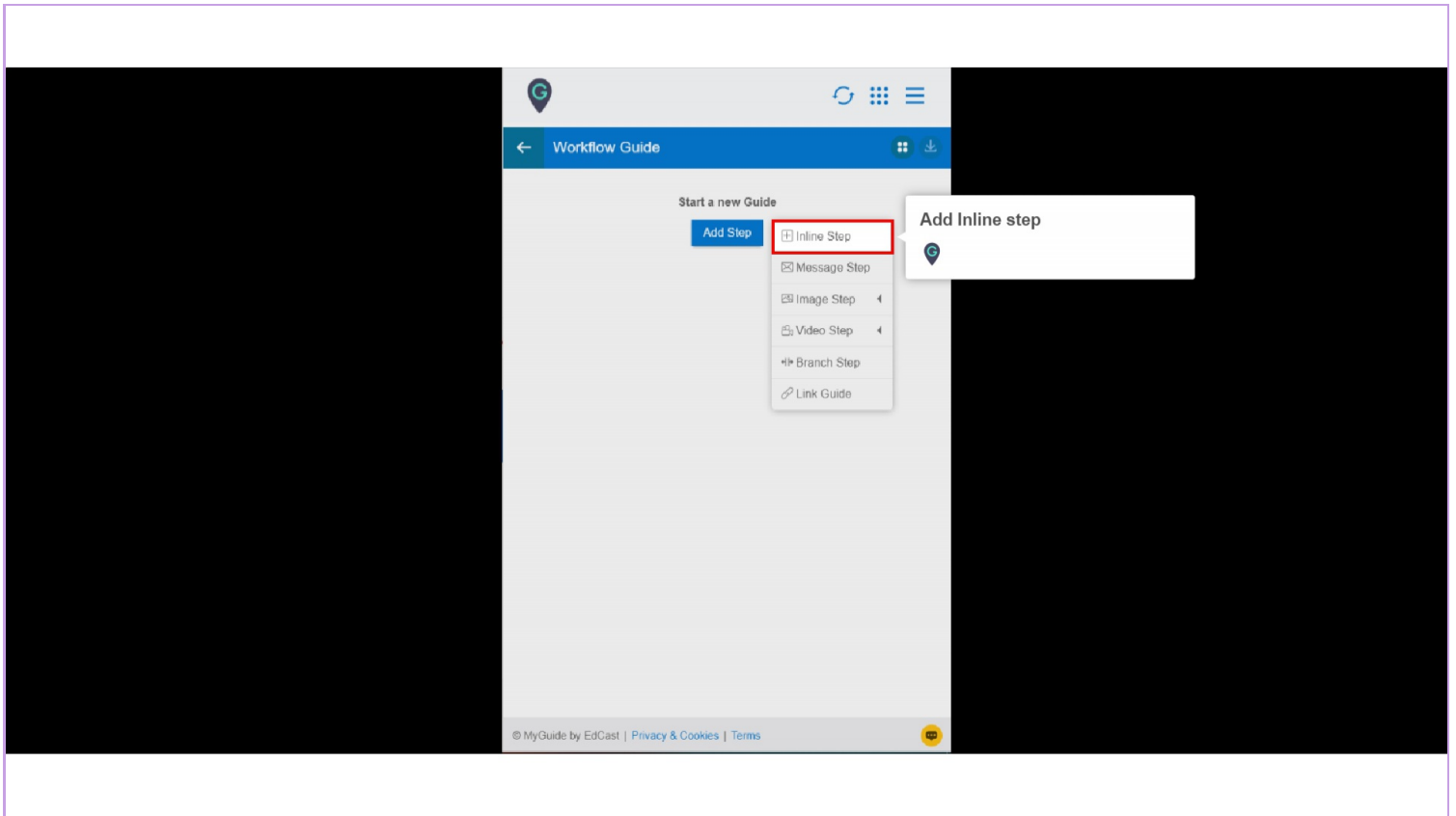
Workflow Automation

It lets you automate specific types of steps, as per our selection from the feature “When will this step complete?”



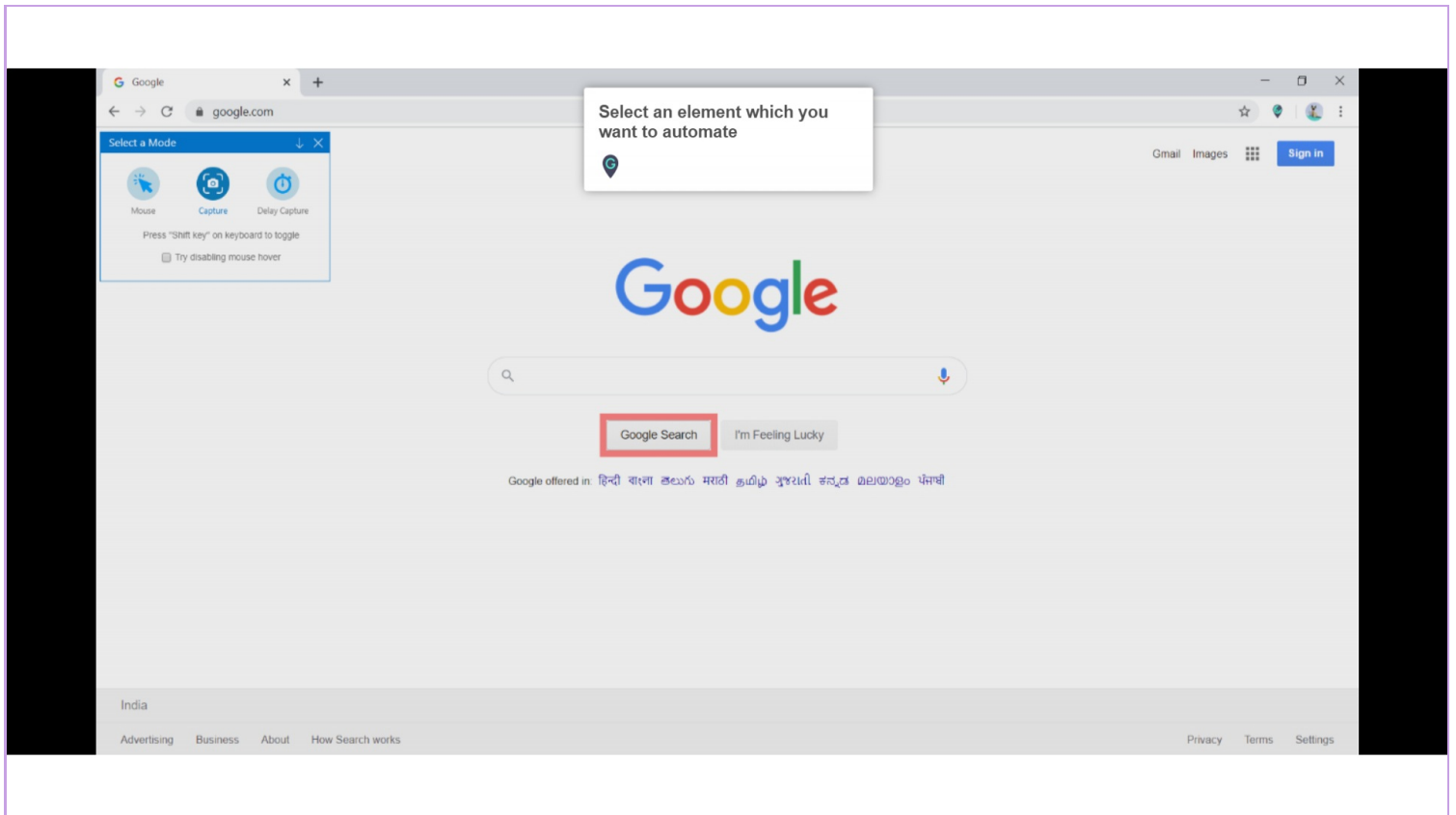
Step: 02

Add Inline step



Step: 03

Select an element which you want to automate



Step: 04

Enter step title and description

The screenshot displays the 'Create Step' dialog box in the myGuide application. The dialog box is titled 'Click on "Google Search"' and features a text input field with the placeholder text 'Enter step title and description'. The 'Step Title' and 'Step Description' tabs are highlighted with red boxes. The background shows the Google homepage with the 'Google Search' button also highlighted with a red box. The dialog box includes a rich text editor toolbar and a 'When will this step complete?' section with several radio button options. The 'Save & Next' button is highlighted in blue.

Step: 05

If you select the highlighted conditions of "When will the step complete" for your step creation, your guide will be automated in one click

The screenshot displays the configuration interface for a step in a guided tour. The main window shows a Google search page with a red box highlighting the 'Google Search' button. A tooltip above the button reads 'Click on "Google Search"'. On the left, a configuration panel is visible. The 'When will this step complete?' section has several options, with 'On click anywhere on the page' and 'After 4 second' highlighted with red boxes. The 'Settings' section includes checkboxes for 'This step is optional', 'Do not hide the step popup when the step element gets hidden', and 'Hide previous button'. The 'Automation' section at the bottom has 'Cancel', 'Save & Next', and 'Save' buttons. A text box at the top of the configuration panel contains the text 'Click on "Google Search"' and a character count '24 CHARACTERS POWERED BY TINY'.

If you select the highlighted conditions of "When will the step complete" for your step creation, your guide will be automated in one click

Click on "Google Search"

24 CHARACTERS POWERED BY TINY

When will this step complete?

- On click of selected element
 - Default
 - Opens new tab
 - Page reloads
- On click of "Next" button
- On right click of selected element
- On hover over of selected element
- On change of value (for select field)
- On click anywhere on the page
- On click in a page, pause this guide
- On typing text (for text boxes)
- After 4 second

Settings

- This step is optional
- Do not hide the step popup when the step element gets hidden
- Hide previous button

Automation

Cancel Save & Next Save

Privacy Terms Settings

Step: 06

If a guide step is not automated but still gets played from DoltForMe button, it is due to the completion of any of these highlighted conditions that require human interaction

The screenshot displays the configuration interface for a guide step on the Google homepage. The main window shows the Google search page with a 'Click on "Google Search"' instruction. A red box highlights the 'Google Search' button. A text box above the page reads: 'If a guide step is not automated but still gets played from DoltForMe button, it is due to the completion of any of these highlighted conditions that require human interaction'. The configuration panel on the left lists various conditions for when the step completes, with three items highlighted in red: 'On hover over of selected element', 'On change of value (for select field)', and 'On click in a page, pause this guide'. The 'Automation' section at the bottom includes 'Cancel', 'Save & Next', and 'Save' buttons.

When will this step complete?

- On click of selected element
 - Default
 - Opens new tab
 - Page reloads
- On click of "Next" button
- On right click of selected element
- On hover over of selected element
- On change of value (for select field)
- On click in a page, pause this guide
- On typing text (for text boxes)
- After second

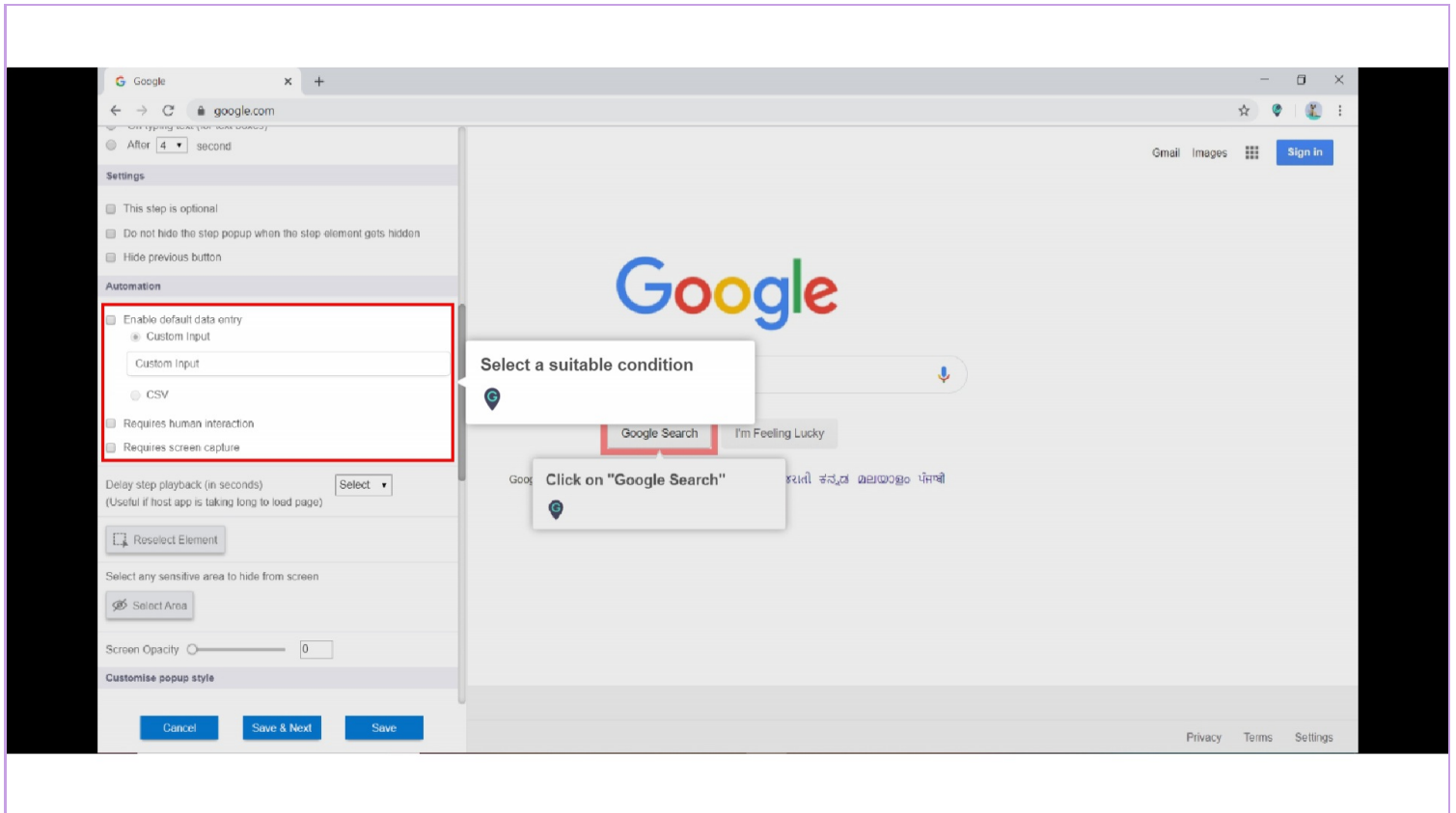
Settings

- This step is optional
- Do not hide the step popup when the step element gets hidden
- Hide previous button

Automation

Step: 07

Select a suitable condition



- **Automation Section has 3 conditions:**

- Enable Default Data Entry
- Requires Human Interaction
- Requires Screen Capture

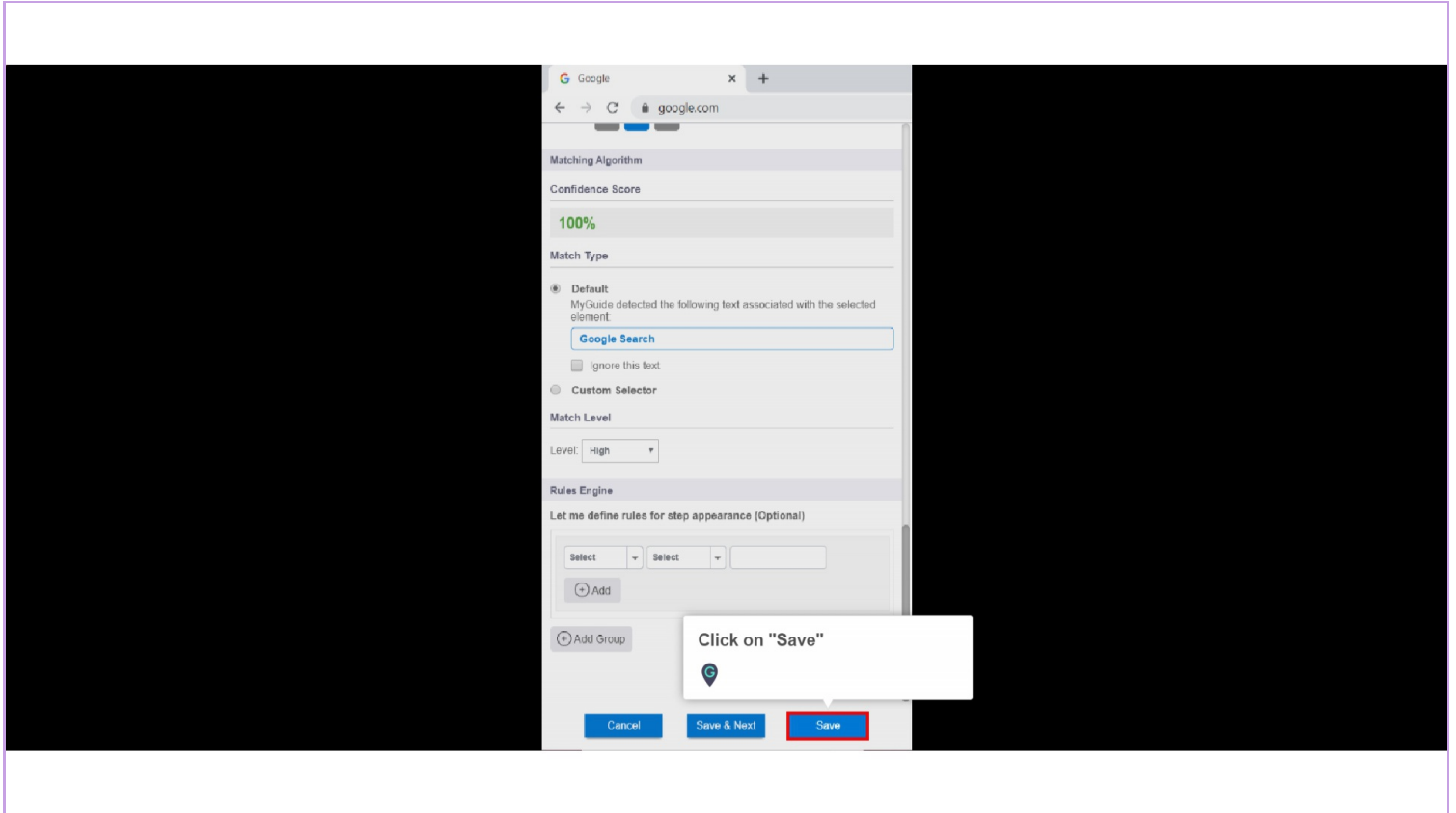
When the guide is automated, it tends to complete the task specified in the step by itself, except for the cases where it needs input from the user. If the input is user-specific, we use "Requires Human Interaction" checkbox.

If the input is a general repetitive data we can select "Custom Input" radio button and enter the data in the text field.

If we are going to run the automation numerous times for different entry each time, we upload a CSV file here.

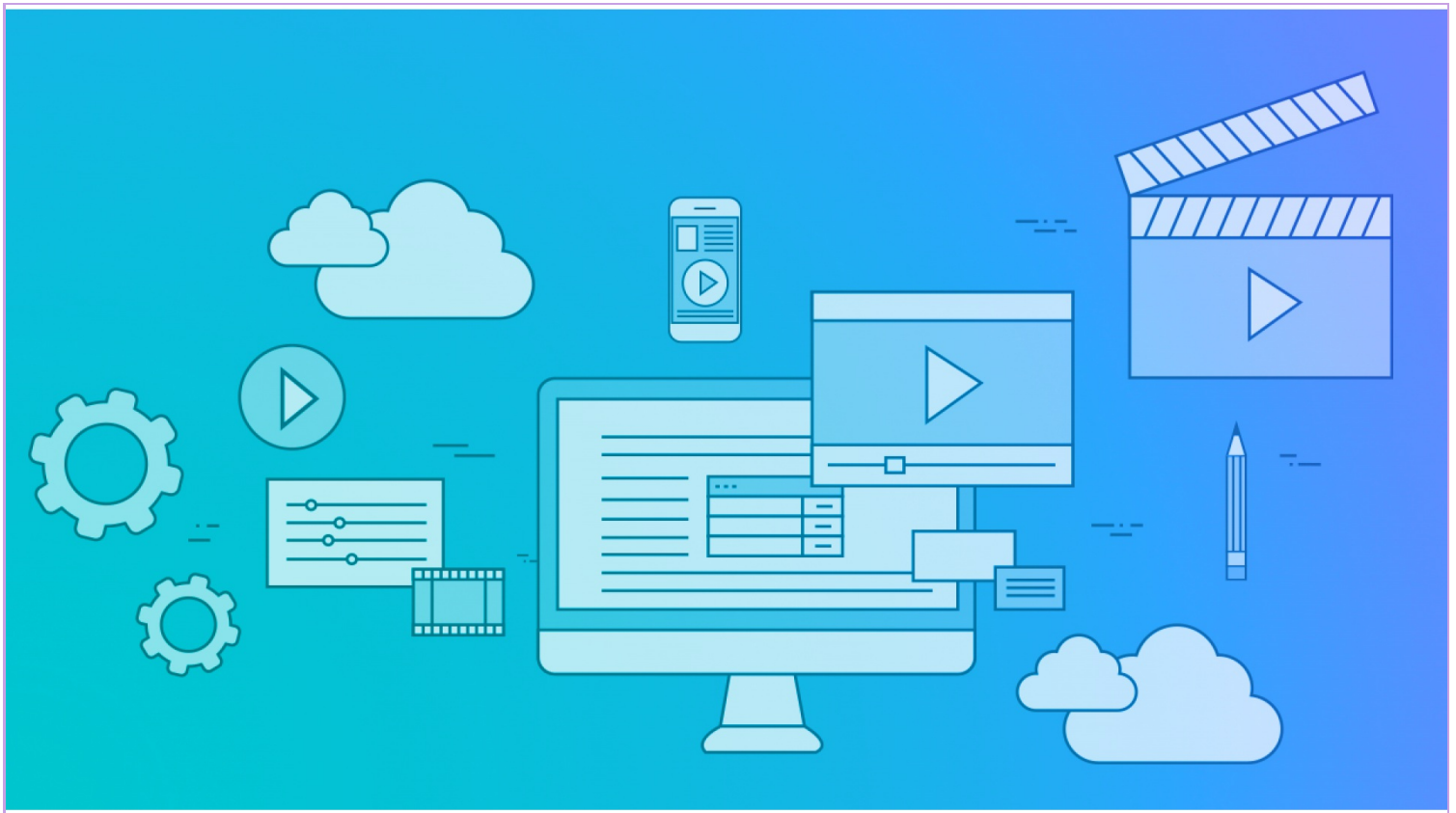
Step: 09

Click on "Save"



Step: 10

Automation in action



Thank You!

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