

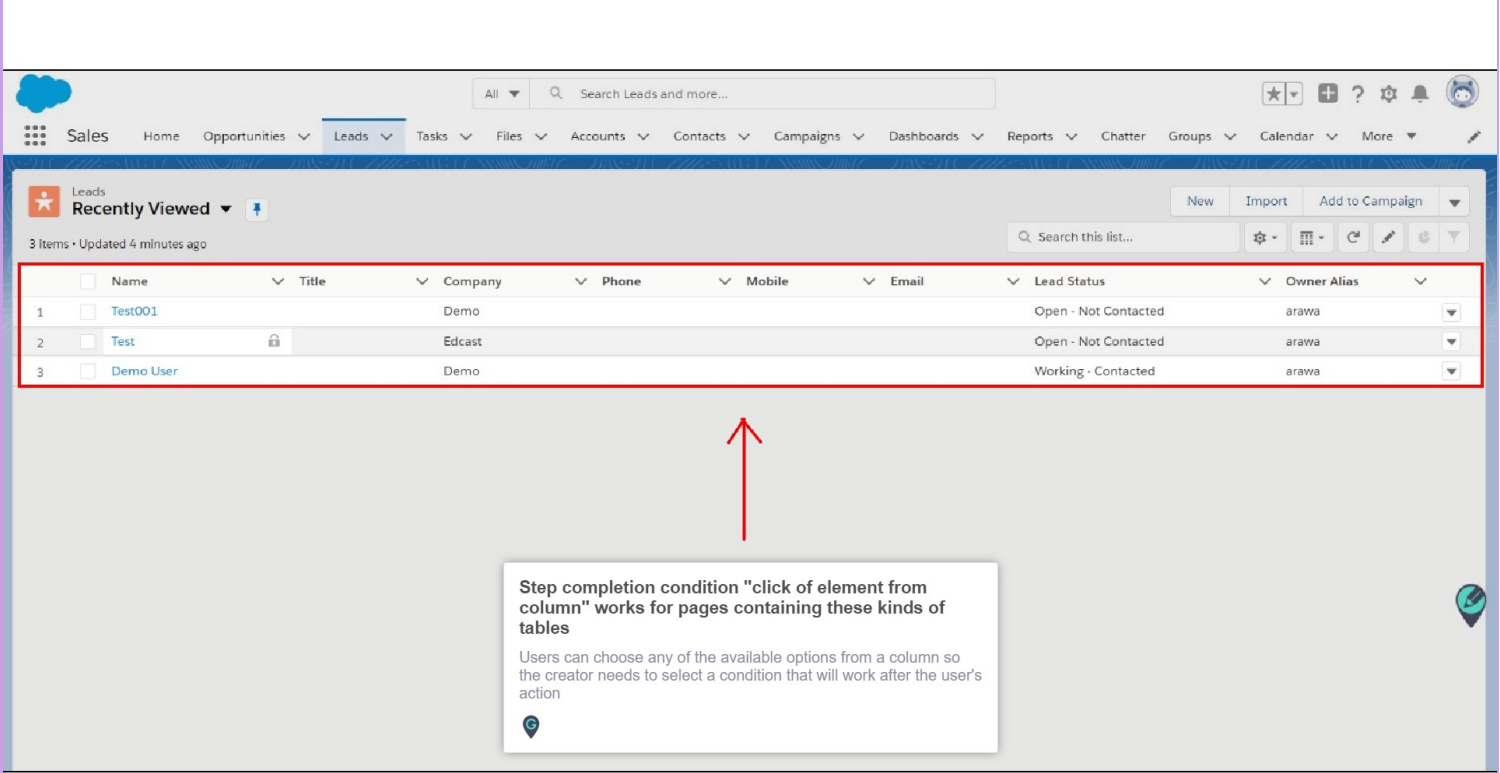


How to create a step requiring Element Selection from a Column

## Step: 01

# Step completion condition "click of element from column" works for pages containing these kinds of tables

Users can choose any of the available options from a column so the creator needs to select a condition that will work after the user's action



The screenshot shows a Salesforce interface with a table of leads. The table has columns for Name, Title, Company, Phone, Mobile, Email, Lead Status, and Owner Alias. A red box highlights the table. A red arrow points to a callout box that contains the following text:

**Step completion condition "click of element from column" works for pages containing these kinds of tables**

Users can choose any of the available options from a column so the creator needs to select a condition that will work after the user's action

	Name	Title	Company	Phone	Mobile	Email	Lead Status	Owner Alias
1	Test001		Demo				Open - Not Contacted	arawa
2	Test		Edcast				Open - Not Contacted	arawa
3	Demo User		Demo				Working - Contacted	arawa

## Step: 02

Open the page wherever you want to create step that requires the users to select an element from column, for completion

Go to "Add Step" and click on "Inline Step"

The screenshot displays a CRM interface with a 'Leads' table and a 'Sample Workflow Guide' overlay. The table lists three leads: 'Test001', 'Test', and 'Demo User'. The workflow guide shows a step '1. Click on "Leads"' and a menu with options: 'Add Step', 'Inline Step', 'Message Step', 'Image Step', 'Video Step', 'Branch Step', and 'Link Guide'. The 'Inline Step' option is highlighted with a red box. Two callout boxes provide instructions: 'Open the page wherever you want to create step that requires the users to select an element from column, for completion' and 'Go to "Add Step" and click on "Inline Step"'. The footer of the interface reads '© MyGuide by EdCast | Privacy & Cookies | Terms'.

Name	Title	Company	Phone	Mobile	Email
1	<input type="checkbox"/>	Test001		Demo	
2	<input type="checkbox"/>	Test		Edcast	
3	<input type="checkbox"/>	Demo User		Demo	

- 1. Click on "Leads"
- Add Step
- Inline Step**
- Message Step
- Image Step
- Video Step
- Branch Step
- Link Guide

## Step: 03

### You are in capture mode

Select any parameter or heading of the column

The screenshot displays the Salesforce interface for the 'Leads' section. The 'Name' column header in the table is highlighted with a red box. A tooltip message is overlaid on the table, stating 'You are in capture mode. Select any parameter or heading of the column.' At the bottom left, a 'Select a Mode' dialog is open, showing three options: 'Mouse', 'Capture', and 'Delay Capture'. The 'Capture' option is selected. The table contains three rows of lead data:

	Name	Title	Company	Phone	Mobile	Email	Lead Status	Owner Alias
1	Test001		Demo				Open - Not Contacted	arawa
2	Test		Edcast				Open - Not Contacted	arawa
3	Demo User		Demo				Working - Contacted	arawa

## Step: 04

After you've selected the appropriate text/heading, you will see that the condition "On click of element from column" will be auto enabled

You can enable "Opens in a new tab" if the element which users are going to select, opens in a new tab or you can enable "Page reloads" if the element which users are going to select, opens after page reload

The screenshot shows a CRM interface with a table of leads. The 'Name' column is highlighted with a red box. A tooltip above it says "Select an element from the column". A larger tooltip in the center says "After you've selected the appropriate text/heading, you will see that the condition 'On click of element from column' will be auto enabled". On the right, a configuration panel is open, showing a dropdown menu with "On click of element from column" selected and highlighted with a red box. Below this, there are radio buttons for "Default", "Opens new tab", and "Page reloads". Another tooltip at the bottom right says "You can enable 'Opens in a new tab' if the element which users are going to select, opens in a new tab or you can enable 'Page reloads' if the element which users are going to select, opens after page reload".

	Name	Title	Company	Phone	Mobile	Email	Lead
1	Test001		Demo				Open
2	Test		Edcast				Open
3	Demo User		Demo				Work

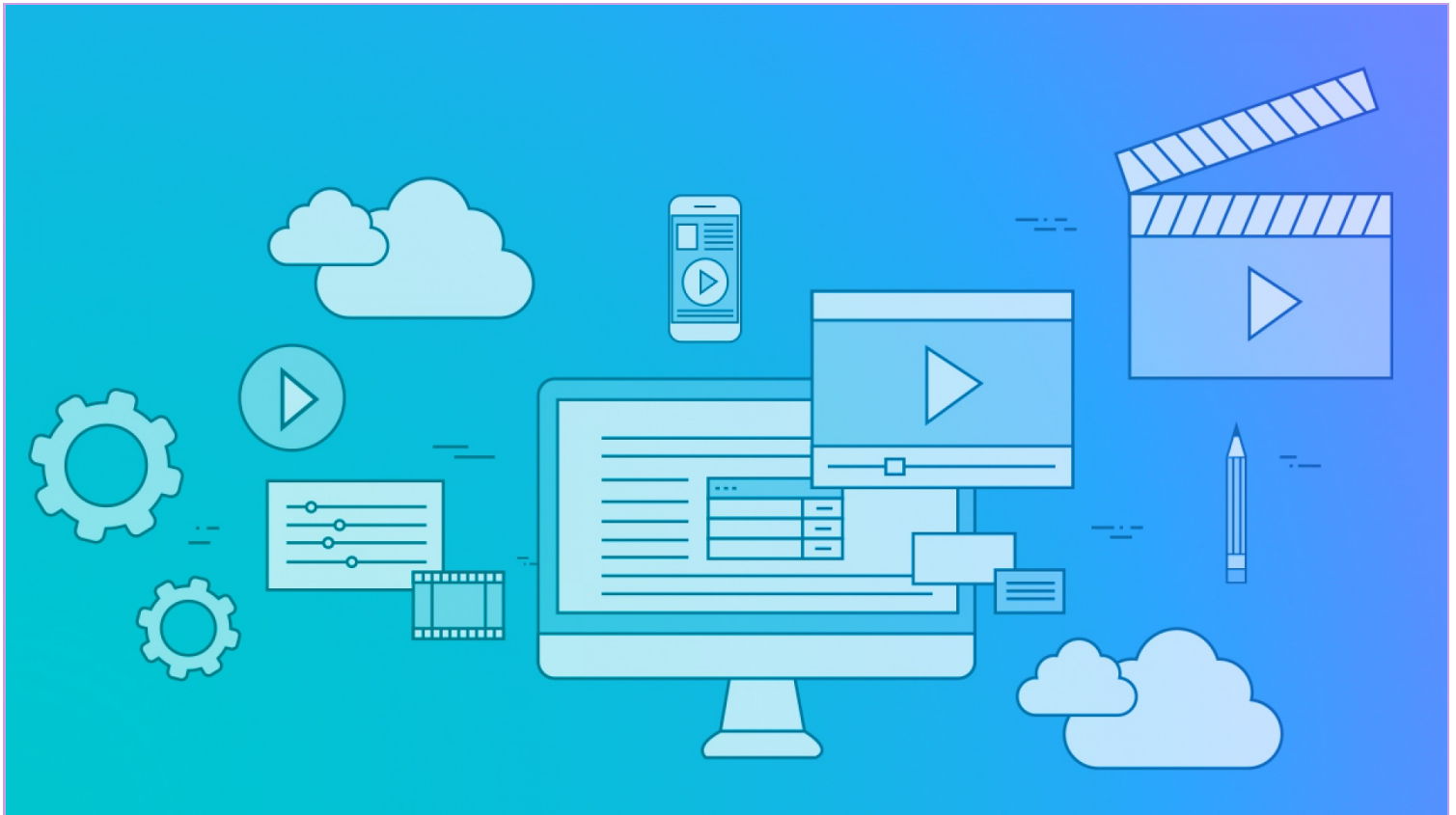
## Step: 05

Set title, description and rest of the customization and save the step

The screenshot displays the MyGuide interface with a customization panel on the right. The main area shows a table with columns: Name, Title, Company, Phone, Mobile, Email, and Location. The 'Name' column is highlighted with a red box, and a tooltip above it says "Select an element from the column". The customization panel on the right is titled "Customise popup style" and includes a visual editor, width and height input fields (Width: 300 px, Height: 0 px), a "Matching Algorithm" section, a "Confidence Score" of 80%, a "Match Type" section with "Default" selected (showing "SortNameColumn Menu" as detected text), and a "Match Level" dropdown set to "High". The "Save" button at the bottom right of the panel is highlighted with a red box. A central tooltip reads: "Set title, description and rest of the customization and save the step".

## Step: 06

How does this work?



# Thank You!

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