

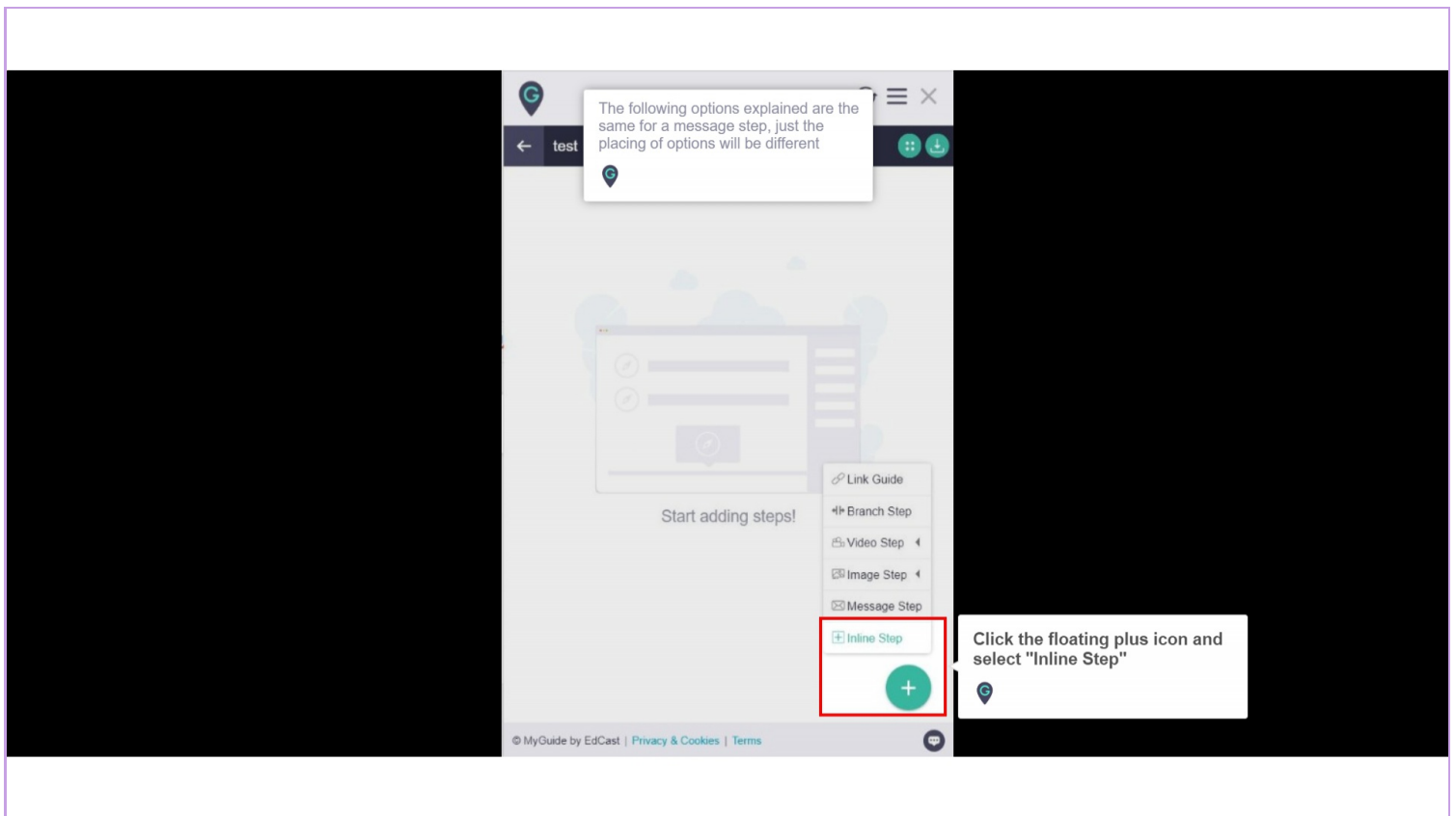


Inline and Message Step Conditions

Step: 01

The following options explained are the same for a message step, just the placing of options will be different

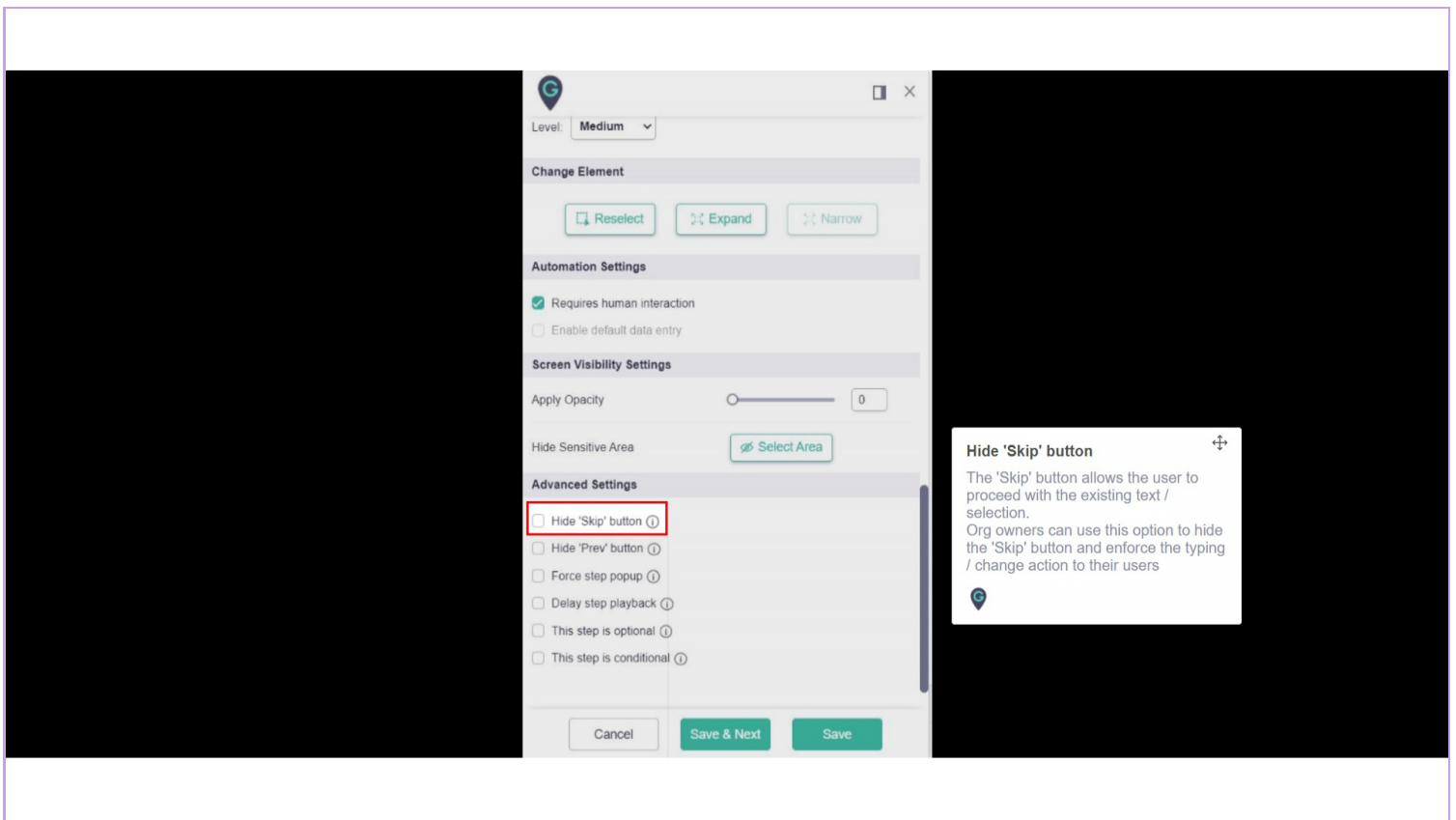
1) Click the floating plus icon and select "Inline Step"



Step: 02

Hide 'Skip' button

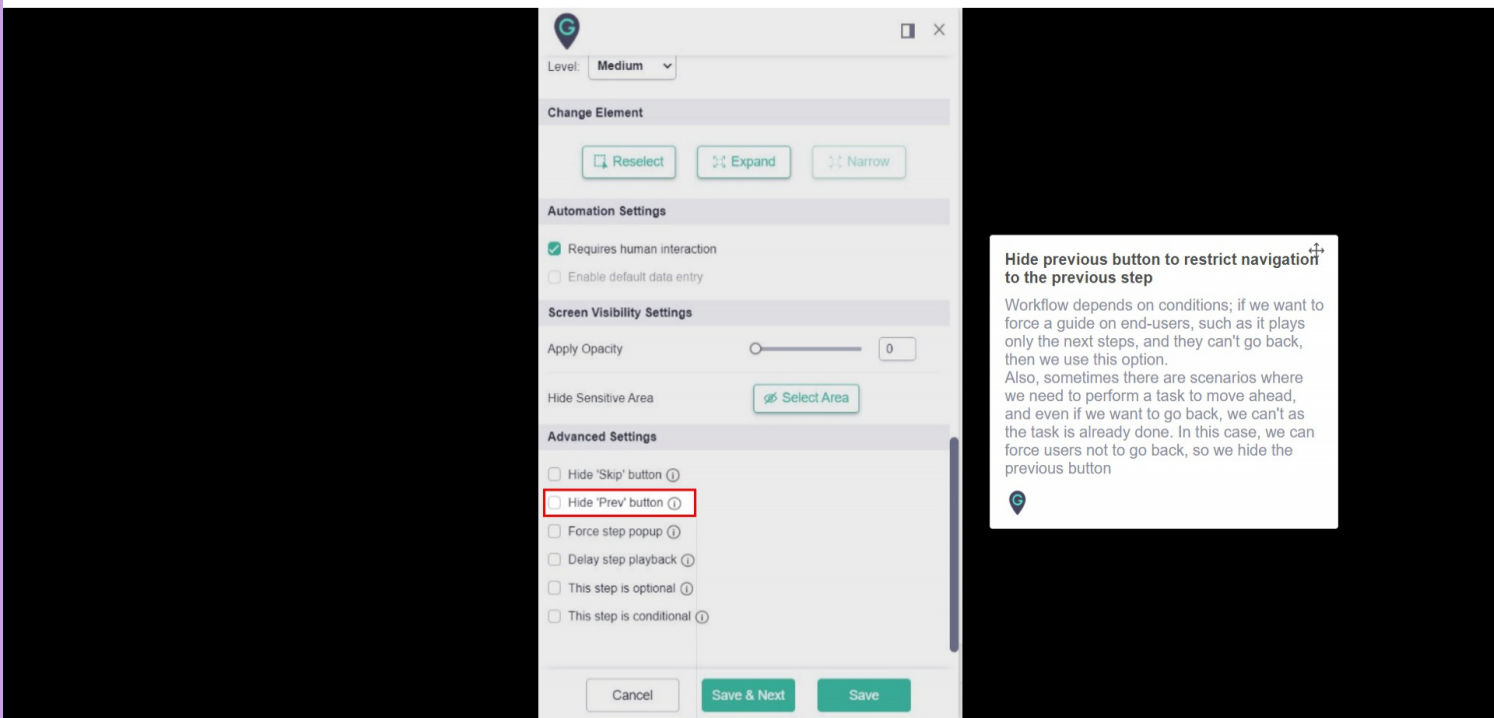
The 'Skip' button allows the user to proceed with the existing text / selection. Org owners can use this option to hide the 'Skip' button and enforce the typing / change action to their users



Step: 03

Hide previous button to restrict navigation to the previous step

Workflow depends on conditions; if we want to force a guide on end-users, such as it plays only the next steps, and they can't go back, then we use this option. Also, sometimes there are scenarios where we need to perform a task to move ahead, and even if we want to go back, we can't as the task is already done. In this case, we can force users not to go back, so we hide the previous button



The screenshot displays the configuration interface for a step in a guide. The interface is divided into several sections: 'Change Element' with 'Reselect', 'Expand', and 'Narrow' buttons; 'Automation Settings' with 'Requires human interaction' checked and 'Enable default data entry' unchecked; 'Screen Visibility Settings' with an 'Apply Opacity' slider set to 0 and a 'Select Area' button; and 'Advanced Settings' with several options. The 'Hide Prev' button option is highlighted with a red box. At the bottom, there are 'Cancel', 'Save & Next', and 'Save' buttons.

Hide previous button to restrict navigation to the previous step

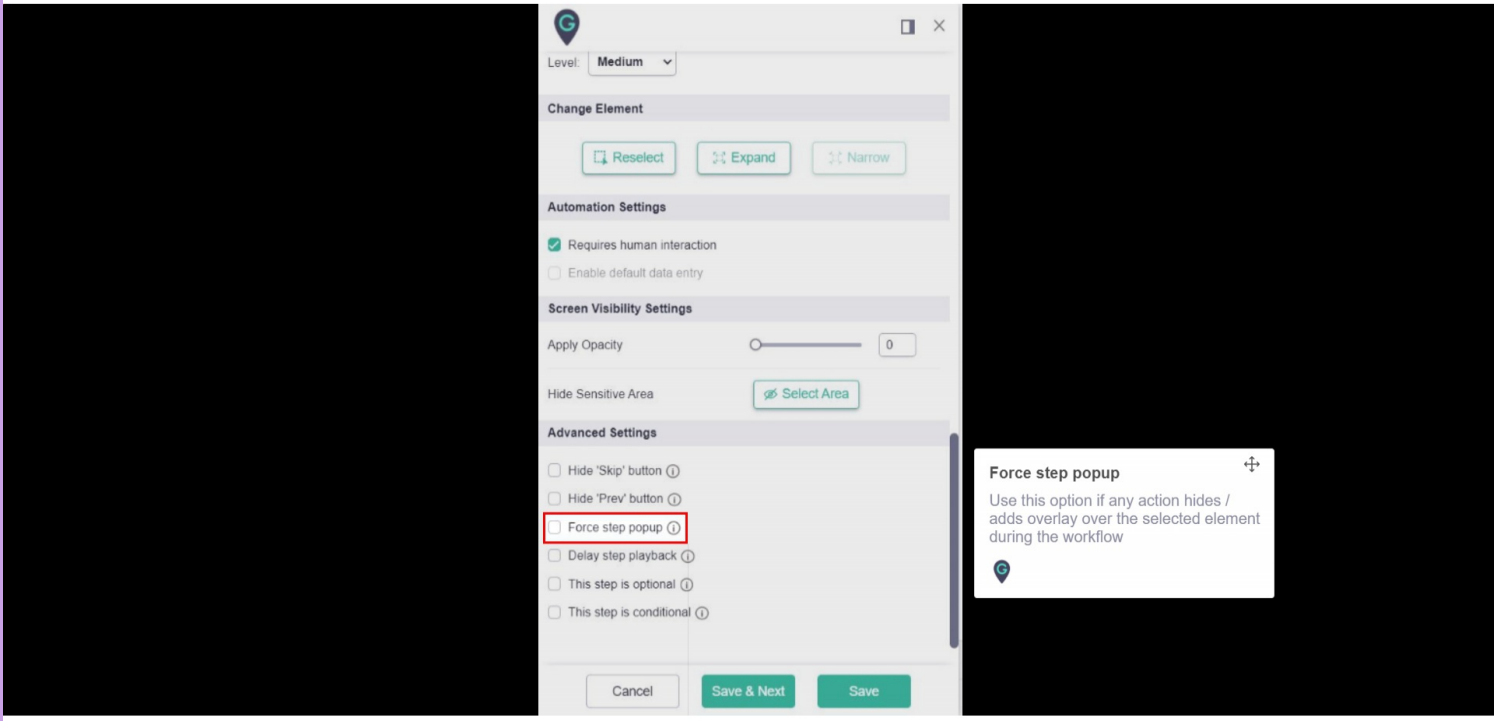
Workflow depends on conditions; if we want to force a guide on end-users, such as it plays only the next steps, and they can't go back, then we use this option. Also, sometimes there are scenarios where we need to perform a task to move ahead, and even if we want to go back, we can't as the task is already done. In this case, we can force users not to go back, so we hide the previous button

Step: 04

Force step popup

Use this option if any action hides / adds overlay over the selected element during the workflow

1) Force step popup



The screenshot shows a settings menu for a step in a workflow. The menu is titled 'Level: Medium' and includes several sections:

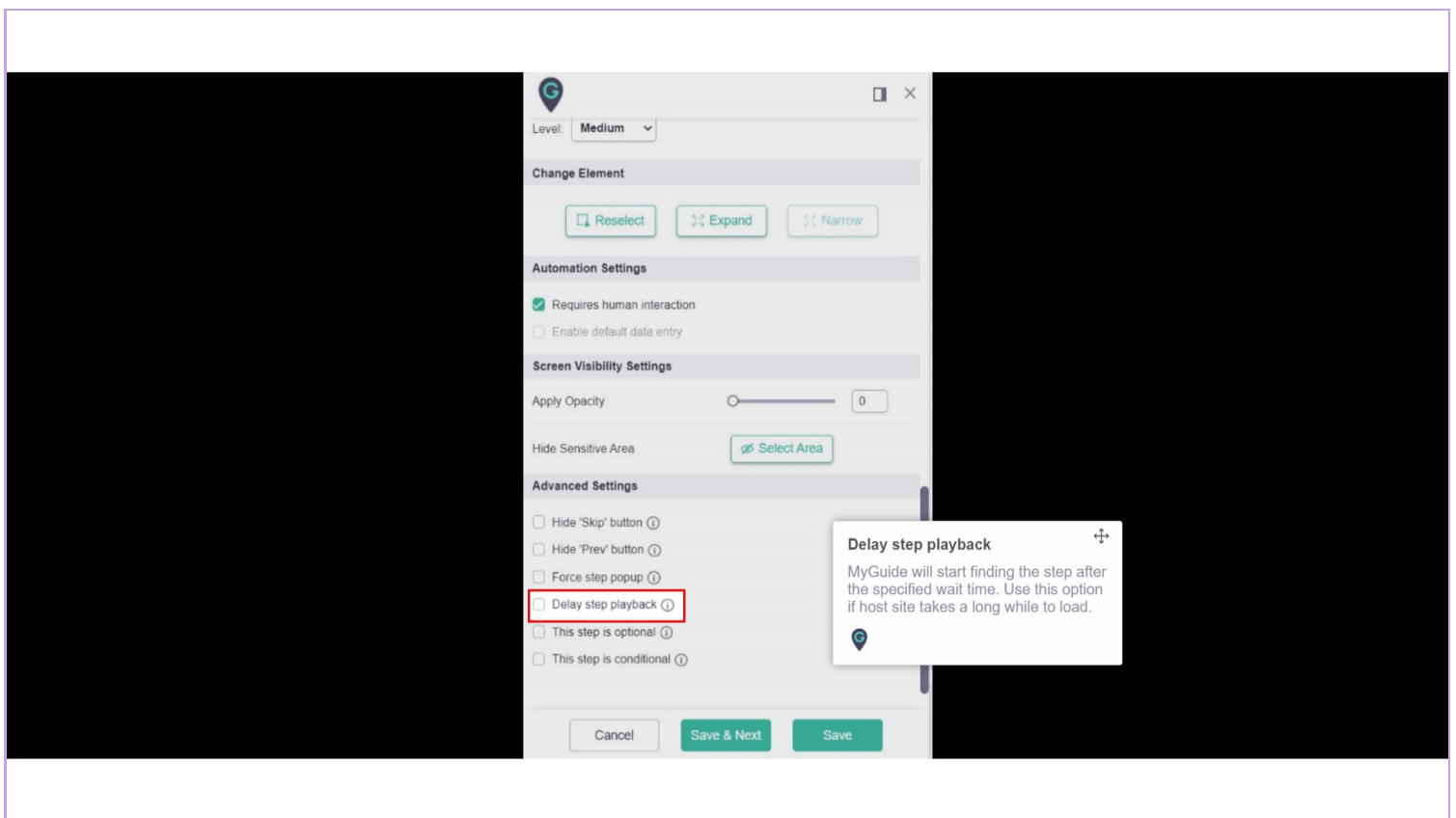
- Change Element:** Contains buttons for 'Reselect', 'Expand', and 'Narrow'.
- Automation Settings:** Includes a checked checkbox for 'Requires human interaction' and an unchecked checkbox for 'Enable default data entry'.
- Screen Visibility Settings:** Features a slider for 'Apply Opacity' set to 0 and a 'Select Area' button for 'Hide Sensitive Area'.
- Advanced Settings:** Contains several unchecked checkboxes: 'Hide 'Skip' button', 'Hide 'Prev' button', 'Force step popup' (highlighted with a red box), 'Delay step playback', 'This step is optional', and 'This step is conditional'.

At the bottom of the menu are 'Cancel', 'Save & Next', and 'Save' buttons. To the right of the menu, a white popup box titled 'Force step popup' contains the text: 'Use this option if any action hides / adds overlay over the selected element during the workflow'.

Step: 05

Delay step playback

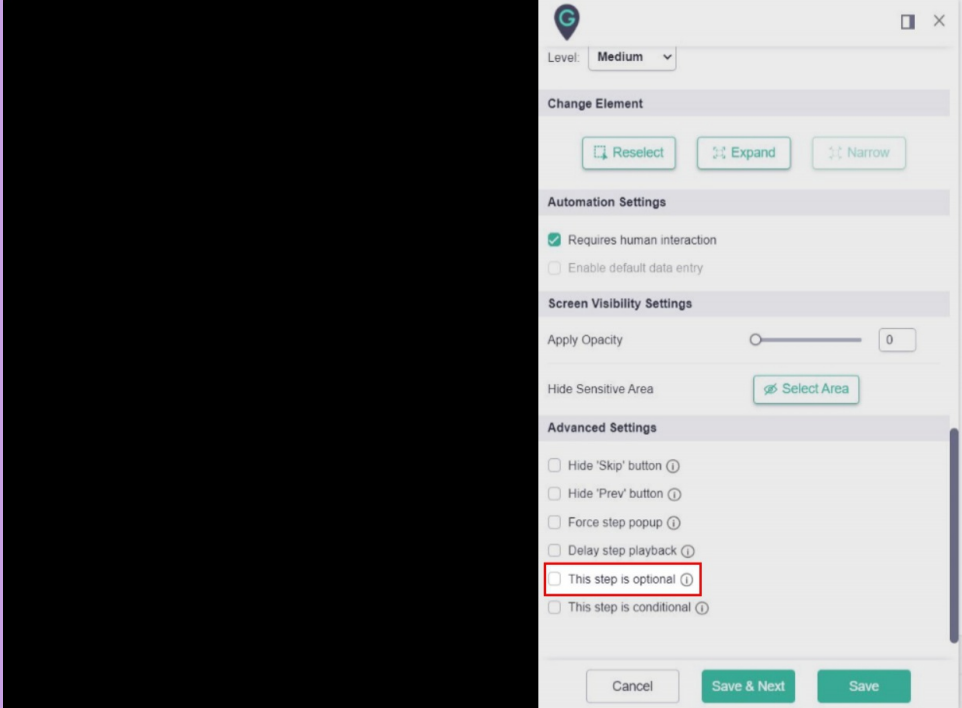
MyGuide will start finding the step after the specified wait time. Use this option if host site takes a long while to load.



Step: 06

This can be used when you have an optional step in your workflow

E.g., Consider a workflow with a step for logging into a platform. Some users might not have logged in and are using that step, but those who have logged in already can face an error for that step because MyGuide may not find the scenario for which the step was created. To avoid this, we select the checkbox to make this step optional. MyGuide will search for a step for 5 seconds and will switch to the next step if that step is not found.



The screenshot displays the MyGuide configuration interface. The 'Level' is set to 'Medium'. Under 'Change Element', there are buttons for 'Reselect', 'Expand', and 'Narrow'. The 'Automation Settings' section includes a checked checkbox for 'Requires human interaction' and an unchecked checkbox for 'Enable default data entry'. The 'Screen Visibility Settings' section has an 'Apply Opacity' slider set to 0 and a 'Select Area' button. The 'Advanced Settings' section contains several checkboxes: 'Hide 'Skip' button', 'Hide 'Prev' button', 'Force step popup', 'Delay step playback', 'This step is optional' (which is checked and highlighted with a red box), and 'This step is conditional'. At the bottom, there are 'Cancel', 'Save & Next', and 'Save' buttons.

This can be used when you have an optional step in your workflow

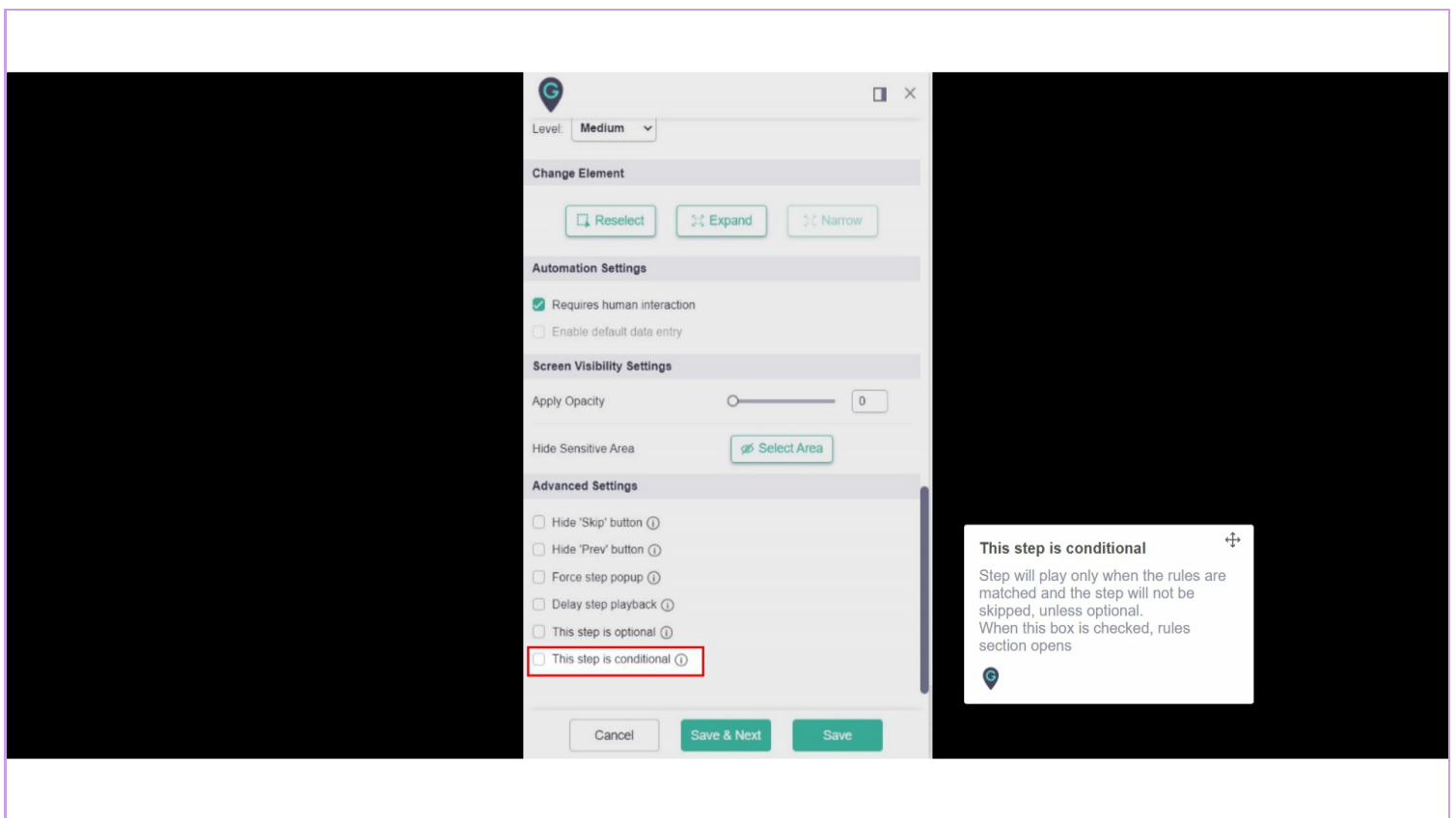
E.g., Consider a workflow with a step for logging into a platform. Some users might not have logged in and are using that step, but those who have logged in already can face an error for that step because MyGuide may not find the scenario for which the step was created.

To avoid this, we select the checkbox to make this step optional. MyGuide will search for a step for 5 seconds and will switch to the next step if that step is not found.

Step: 07

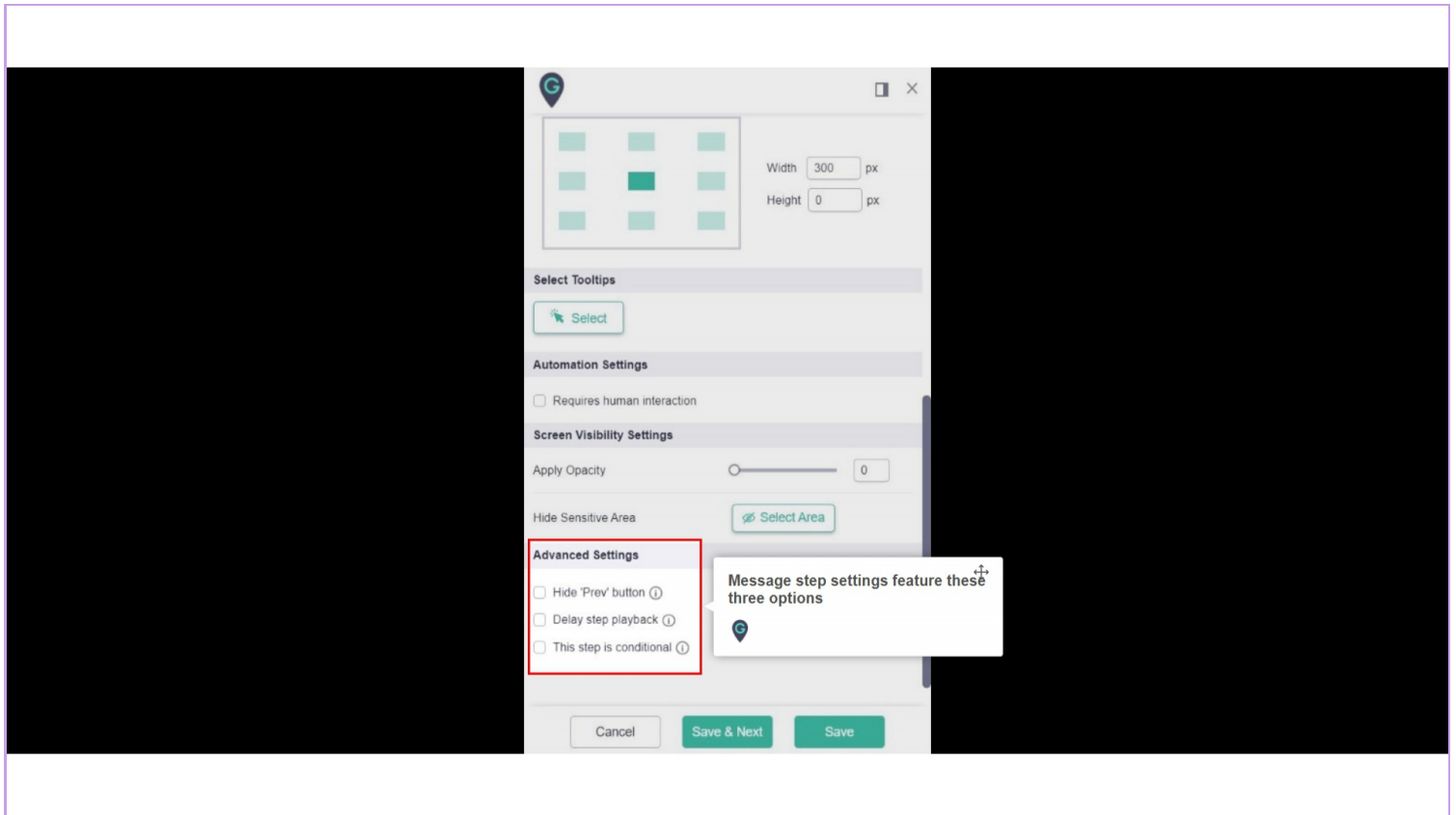
This step is conditional

Step will play only when the rules are matched and the step will not be skipped, unless optional. When this box is checked, rules section opens



Step: 08

1) Message step settings feature these three options

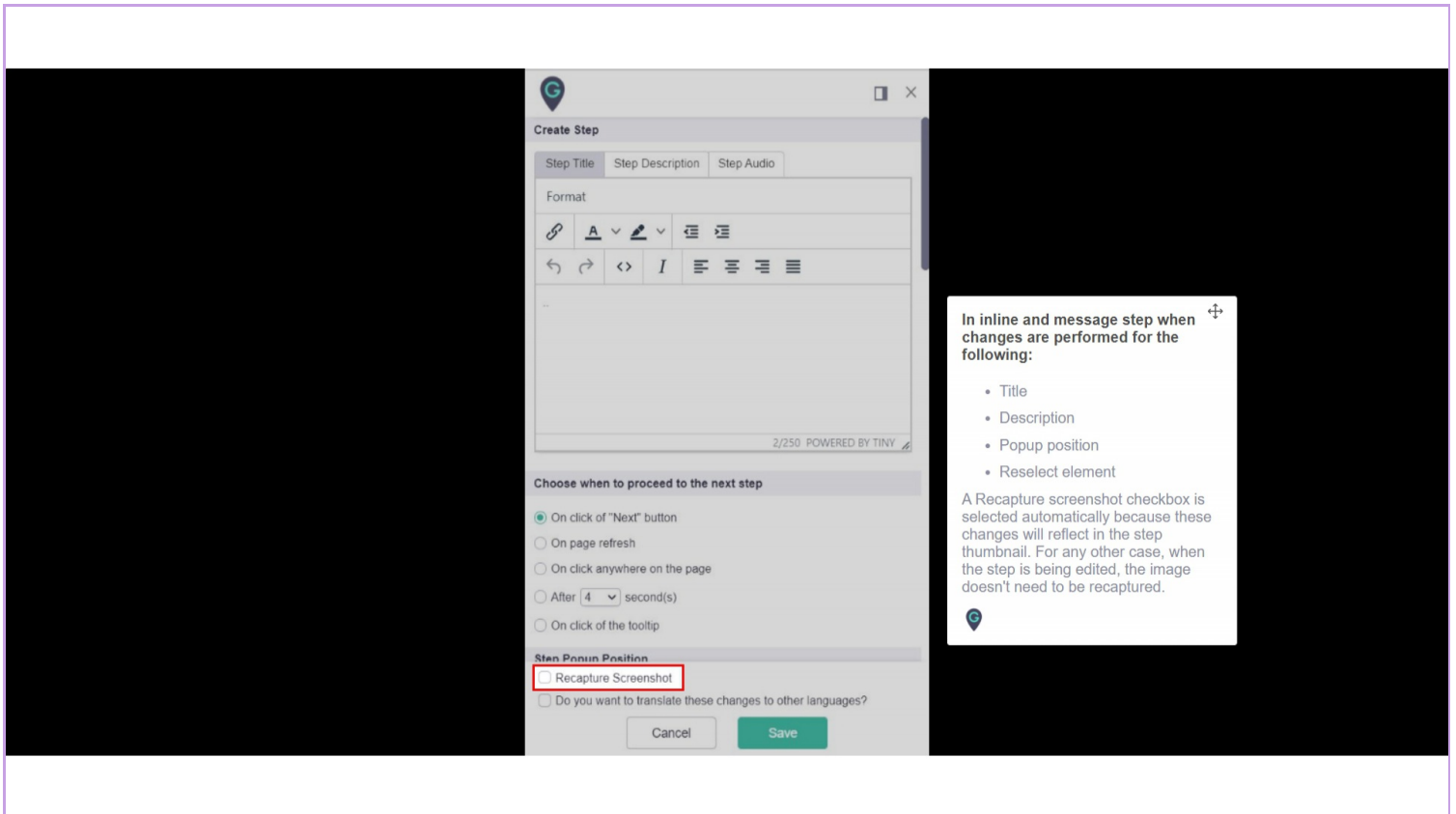


Step: 09

In inline and message step when changes are performed for the following:

1) Title 2) Description 3) Popup position 4) Reselect element

A Recapture screenshot checkbox is selected automatically because these changes will reflect in the step thumbnail. For any other case, when the step is being edited, the image doesn't need to be recaptured.



The image shows a screenshot of a software interface for creating a step. The main window is titled "Create Step" and has three tabs: "Step Title", "Step Description", and "Step Audio". The "Step Description" tab is active, showing a rich text editor with a toolbar and a text area. Below the editor, there are options for "Choose when to proceed to the next step" and "Step Thumbnail Position". The "Recapture Screenshot" checkbox is highlighted with a red box. To the right of the main window, there is a callout box with a title and a list of items.

Create Step

Step Title Step Description Step Audio

Format

Choose when to proceed to the next step

- On click of "Next" button
- On page refresh
- On click anywhere on the page
- After 4 second(s)
- On click of the tooltip

Step Thumbnail Position

- Recapture Screenshot
- Do you want to translate these changes to other languages?

Cancel Save

In inline and message step when changes are performed for the following:

- Title
- Description
- Popup position
- Reselect element

A Recapture screenshot checkbox is selected automatically because these changes will reflect in the step thumbnail. For any other case, when the step is being edited, the image doesn't need to be recaptured.

Thank you

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