

Including optional steps in a Guide

What are optional steps

Optional steps are steps that have a skip condition applied to it. They do not show up for an end-user in all scenarios.

When to use optional steps

You can use optional steps

- For navigation
- For a specific behaviour your end-users might perform

i Navigation steps in Userlane Guides bring users to the correct starting point for the process in your application to ensure that all users begin from the same start.

Example:

From an End-user perspective:

You are on the Userlane Portal.

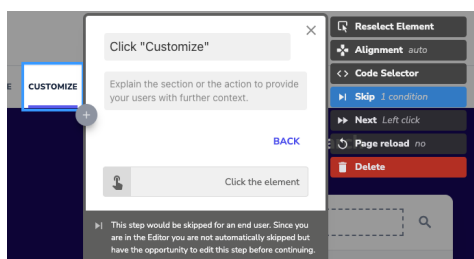
You want to Customize a Colour.

You are currently not in the Customize area.

From a Creator perspective:

You would record the Customize button and apply the “Skip if the next element is found” option. This way users who are not in the Customize area would be directed there first and then see the step that follows.

Users that are already in the right area would not see the step.



i Step that is only showing only for users when they have performed a specific behaviour, e.g. forgot to fill in

a field, forgot to save a progress before moving on with the guide.

Example:

From an End-user perspective:

You are on the Userlane Portal.

You have made a change to a step description for a Guide but did not save.

You now want to start a Guide to learn more about Search.

You will see the first slide but then immediately it would highlight this notification:



From a Creator perspective:

Not everyone might have forgotten to save though, so you would record the “Save your changes” as a step and apply the “Skip if the element is not found” option.

How to make steps optional

There are 2 different use cases for optional steps based on whether or not the step is found.

Skip if the element of the next step is found

Some steps are only necessary for the next step element to be visible. These are redundant when the element is already displayed to the user.

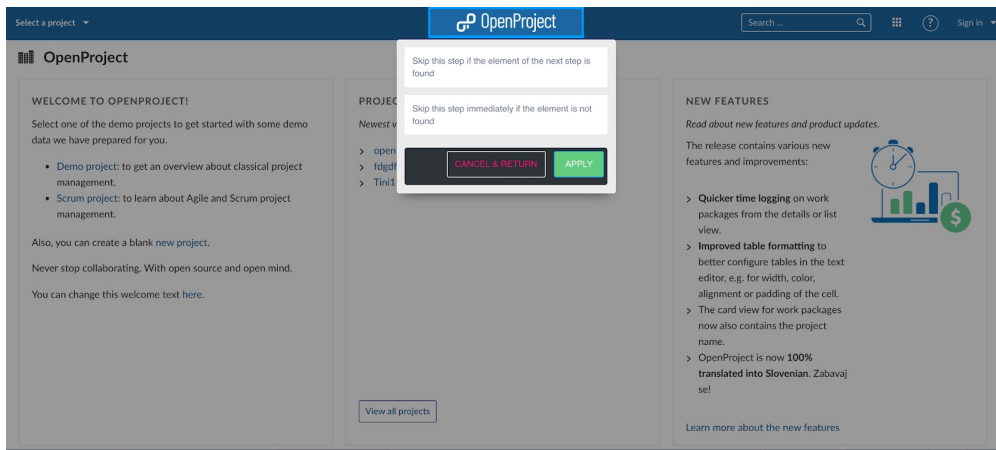
Skip if the element immediately is not found

Some elements only appear in specific situations and not for all users. Thus, the step can become redundant for some users.

How to activate it

Upon recording the preferred Guide steps in Editor, you need to edit the optional step.

1. Select the specific step.
2. Click **Skip** in the side menu of the step box.
3. Select between the 2 options:



4. Click Apply to activate your changes.

📌 When in doubt regarding skip logic please contact your Customer Success Manager or our Support Team.