

ActionBot for Workstation and Desktop

Brief Overview

This article explains how to build a WalkMe ActionBot for Workstation and Desktop.

A WalkMe ActionBot is a chat interface that end-users interact with to complete tasks and answer questions. ActionBot can run all of the following supported processes: Smart Walk-Thrus, Shuttles (with permalinks), Resources, and ShoutOuts. ActionBots, created in WalkMe Workstation / Desktop, determine what the user needs to complete, or their intent. Based on this information, an ActionBot can select the correct conversation.

To learn more about what the WalkMe ActionBot is, visit our article [What Is the WalkMe ActionBot?](#)

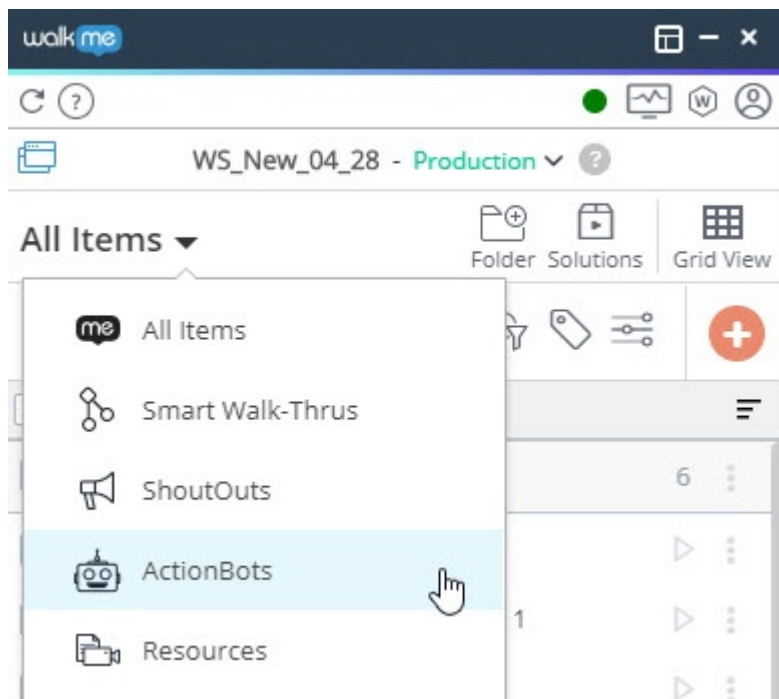
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You can also [read more about building ActionBots here](#).

Please note:

- Supported only on versions V5.9 and above
- Only one ActionBot per Workstation / Desktop account is supported
- Multi-language is not supported
- Self-hosted accounts are not supported
- Workstation systems do not support segmentation, any segmented conversations will not show in Workstation

Steps For Building a Bot

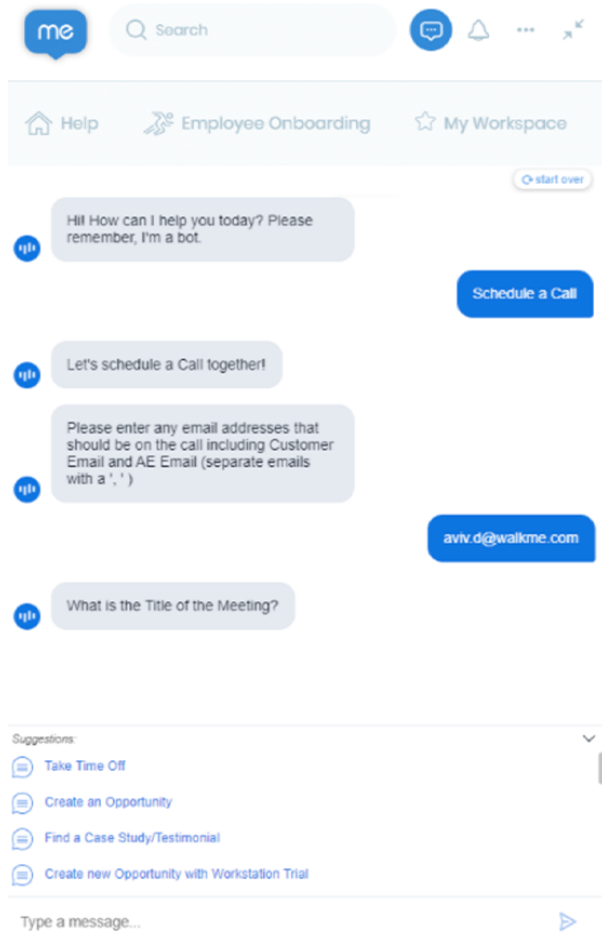
1. Contact your Account Manager to have ActionBot for Workstation / Desktop enabled
2. Click the WalkMe apps dropdown triangle and select the ActionBots app:



- 3.
4. In the ActionBot builder, click on *Bots* in the left sidebar and add a Bot
 - Note - you are only able to add one Bot per Workstation / Desktop account
5. Create a Conversation, allowing ActionBot to run the following supported processes:
 - Smart Walk-Thrus
 - Shuttles (with permalinks)
 - Resources
 - ShoutOuts
6. Publish your ActionBot and enjoy using it for Workstation and Desktop

Please note:

Not all ActionBot features will be available for Desktop and Workstation



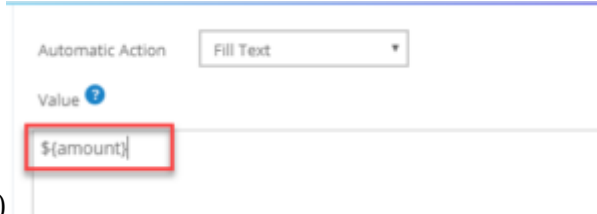
Creating an Automated Process

Using ActionBot, you have the ability to run an automated process from Desktop and Workstation to a web application. This can provide many functional uses, including allowing you to fill a support ticket automatically.

Please note:

- Multi-System Account required
- Self-hosted accounts are not supported at this time
- End-users must be logged into the web application to succeed in playing Automated Smart Walk-Thrus
- The WalkMe Editor must be closed while testing the integration
- The Workstation Bot and Shuttle must be published to the same environment as the Web Editor's Automated Smart Walk-Thru

1. Contact your Account Manager to have ActionBot for Workstation / Desktop enabled
2. In the Web Editor create an Automated Smart Walk-Thru
3. Set the Automated Action to "Fill Text" and require a dynamic conversation value in this

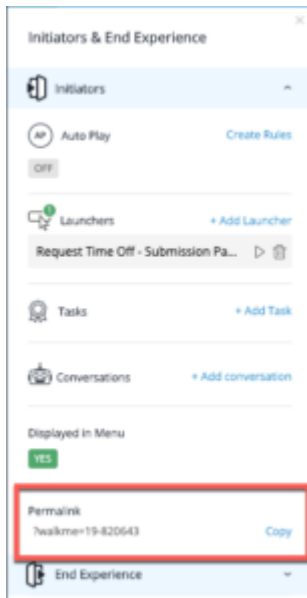


Automatic Action: Fill Text

Value: \$(amount)

format: \$(parameter_name)

4. Once the ASWT is complete, copy the permalink and save it somewhere, you will need it later



Initiators & End Experience

Permalink: twalkme-19-820643

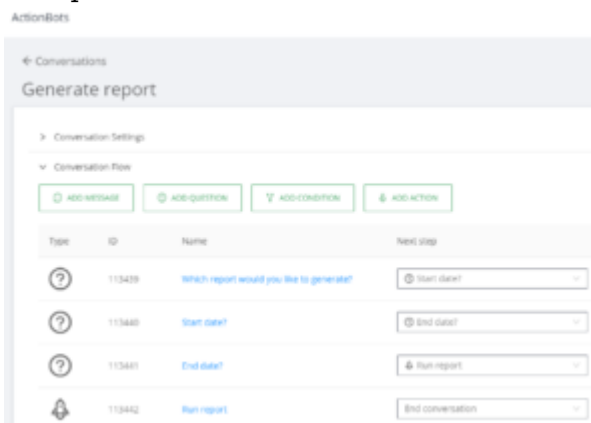
5. Switch to the Desktop / Workstation Editor and create a new Bot - Note that only one Bot per Workstation / Desktop account is currently supported



Bots

Name

6. Create a conversation with conversation questions, as needed

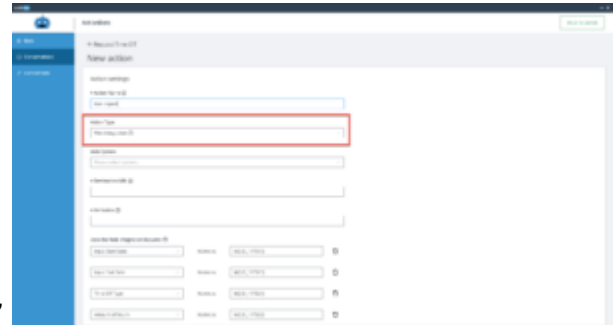


Conversations

Generate report

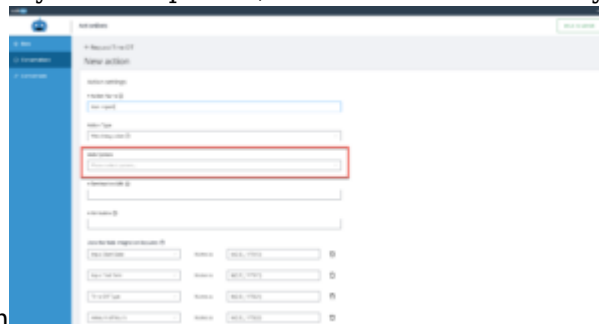
Type	ID	Name	Next step
?	113439	Which report would you like to generate?	Start date?
?	113440	Start date?	End date?
?	113441	End date?	Run report
!	113442	Run report	End conversation

7. End the Conversation with an Action



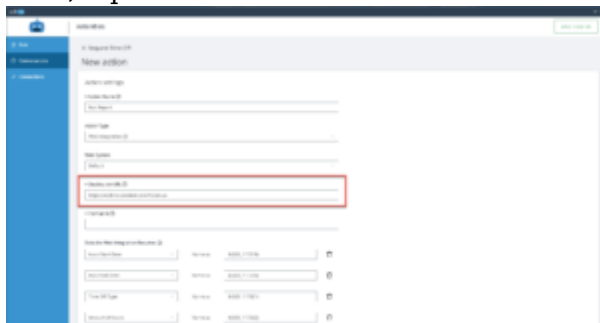
8. Set the Added Action Type to “Web Integration”

9. From the Web System dropdown, select the Editor Web System from the MSA Account to

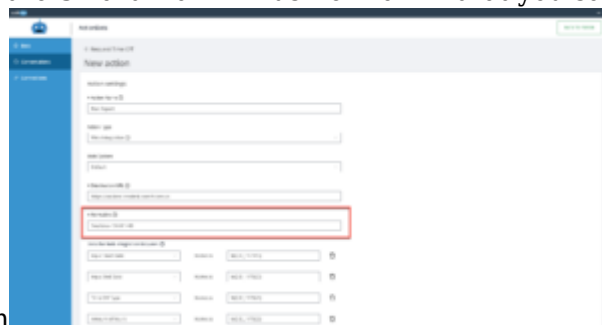


Integrate with

10. Now, input the Destination URL for the Action’s redirect



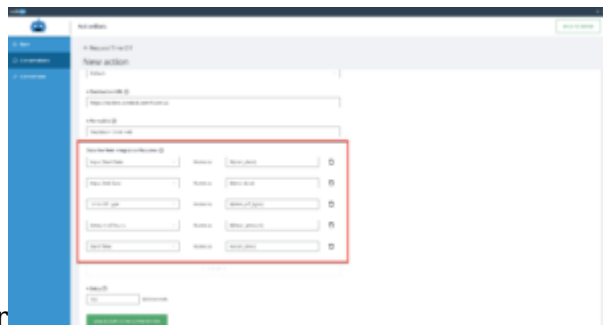
11. Then, input the Smart Walk-Thrus Permalink that you saved earlier from the selected Editor



Web System

12. Under the “Data the Web Integration Requires” section:

1. From the dropdown, reference the Conversation Question
2. Within the input labeled “Name as,” add the matching dynamic conversation parameters applied to the corresponding Automated Fill Step you previously created in the Web



Editor

13. Click **Save Action to Conversation** and enjoy Automated Processes ☐