

ActionBot Form Mode

Brief Overview

ActionBot Form Mode allows you to switch the end-user conversation view from question-by-question to a single form view for conversations that do not require splits in the Bot's dialogue. In some cases, the form can make the end-user interaction much simpler and faster.

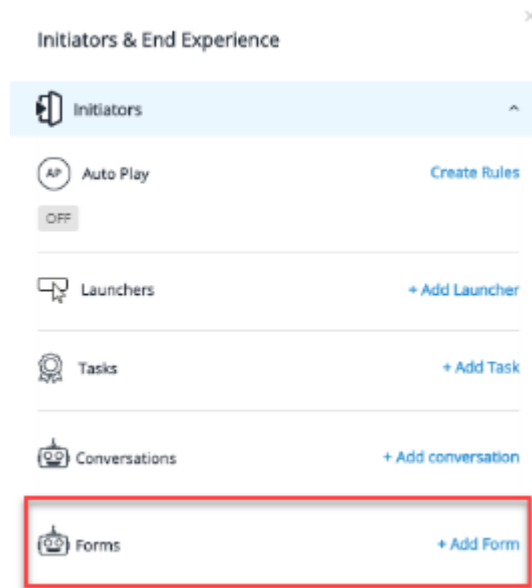
To learn more about ActionBot conversations, see our [How To Create an ActionBot Conversation article](#).

Please note:

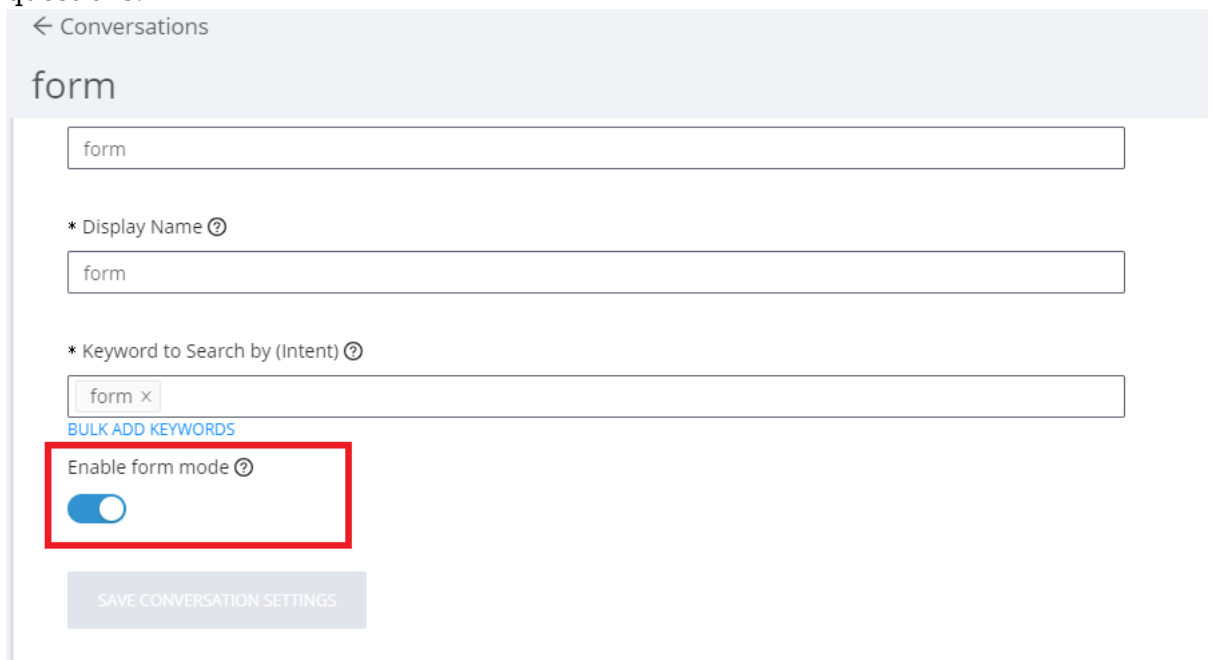
- The conversation needs to have a **Message**, then **Some Questions in a row**, and an **Action** at the end
- Supported question types: text, Boolean, number, regex, phone, email, date, choice
- Supported Action types: Play SWT, Call Connection, Play Shuttle, Web Integration

How It Works

1. If you do not have an existing Automated Smart Walk-Thru, first create a new Smart Walk-Thru with all of the fields that are required to complete the form
2. Make sure that all of the Smart Walk-Thru steps have been converted to Auto Steps - [Learn more here](#)
3. Open the Initiators panel



4. Click "+ Add Form":
5. The ActionBot interface will open automatically, converting your Automated Smart Walk-Thru steps into a conversation
 - If needed you can customize the conversation name, add additional keywords, and assign the conversation to a specific Bot
 - Toggle the "Enable form mode" to convert the conversation into a series of form mode questions:



6. Create the conversation in the following format:
 - One Message
 - One or more questions (text, boolean, number, regex, phone, email, date, choice)
 - One Action (Play SWT, Call Connection)

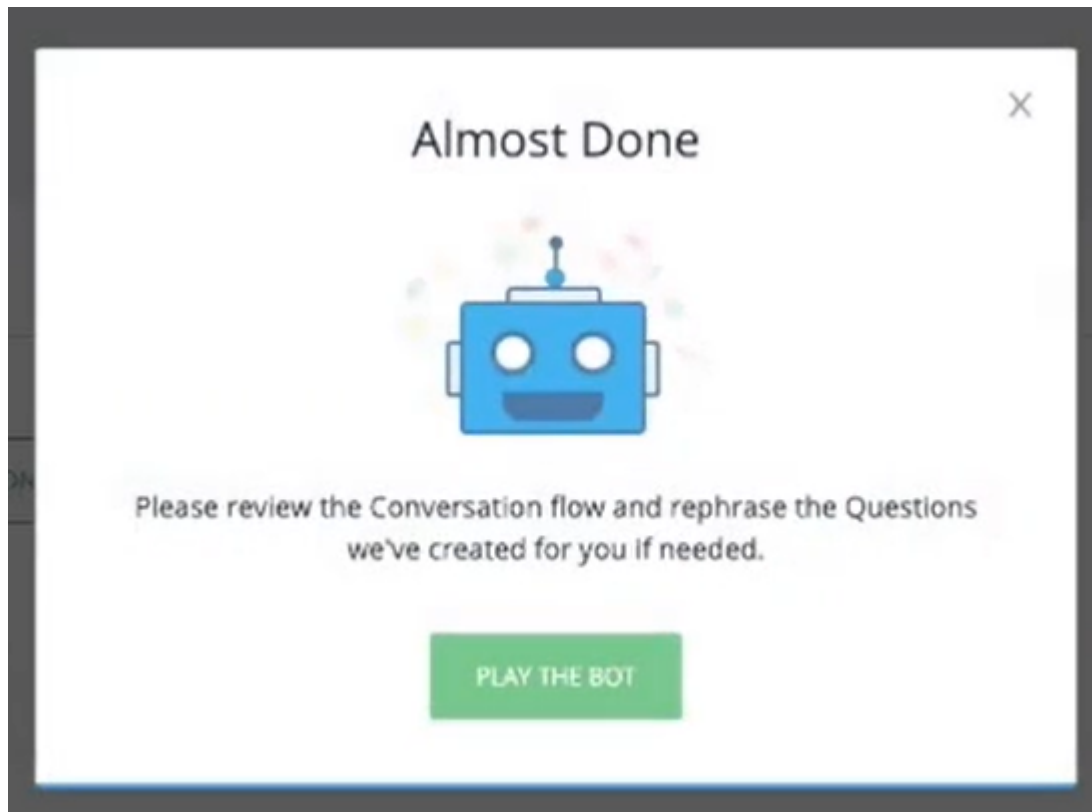
- **Tip:** Add split conditions in between a series of form mode questions to split to the following form mode question depending on the end-users inputs.

← Conversations

Form View

Type	ID	Name	Next step
...	227671	Hey! let's fill out this form together	Where are you located?
?	228052	Where are you located?	location check
Y	228053	location check	Success - Next Step: What's your name Fail - Next Step: What is your account ?
?	227672	What's your name	What's your DOB
?	227787	What is your account ?	What's your DOB
?	227673	What's your DOB	What's your gender
?	227674	What's your gender	Gender check
Y	228054	Gender check	Success - Next Step: What's your hair color Fail - Next Step: Do you like Chocolate
?	227675	What's your hair color	Submit
?	227676	Do you like Chocolate	Submit

7. Click “Save” and then preview the ActionBot conversation



8. You will be able to see the form with split conditions:
[/nas/content/live/kbwalkme/wp-content/uploads/2021/05/split_form_preview.mp4](#)
9. After you have previewed the form, make any desired changes and click “Publish” once you are ready.

Video Demo

Enjoy this video guiding you through the process of how to use ActionBot Forms: