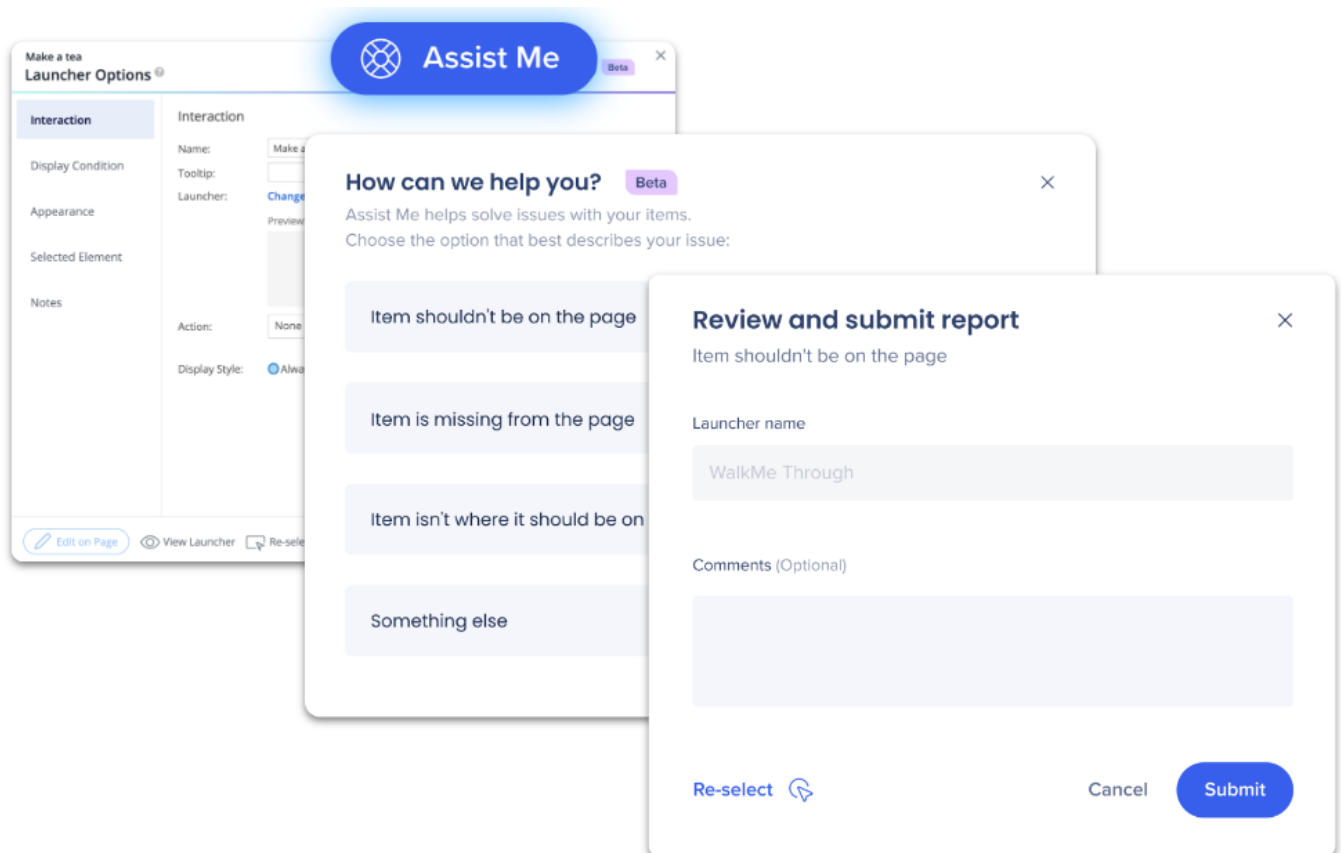


WalkMe Assistant: Tickets

Brief Overview

WalkMe Assistant helps builders when they encounter WalkMe items that aren't behaving as intended by helping to resolve the issue on the spot or by submitting a ticket directly from within the Editor.



For example, a Launcher might display next to an incorrect element. WalkMe Assistant will either help to locate the item next to the correct element, or submit a ticket to WalkMe.

Supported item types

Assistant is currently only available for Launchers, Smart Walk-Thru steps, and SmartTips.

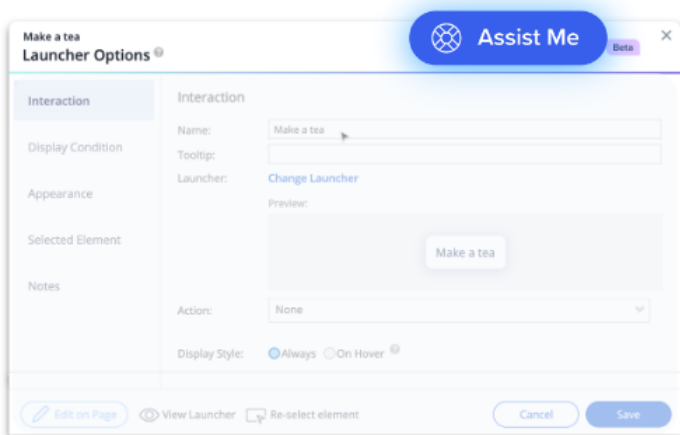
Check out this video to learn more about Assistant's capabilities



Get to Know Assistant

How does it work?

Assistant is accessed **via the Editor**. If you need help with a WalkMe item, open the item in the Editor and click the Assist Me button.



Issue selection

After clicking the Assist Me button, a popup opens with a list of the most common issues.

Click each option for an explanation.

Option 1: Item shouldn't be on the page

There is a WalkMe item on the page I am on, and it shouldn't be here.

Option 2: Item is missing from the page

I'm on a page where an item should be, but it's not being displayed.

Option 3: Item isn't where it should be on the page

I'm on the correct page, but the item is displaying in a different location on the page than I intend

for it to be.

Option 4: Something else

None of the other options match my issue.

Solving Option 1 with Context

If the item was built on Salesforce Lightning, then Assistant may be able to solve the problem with Context. In which case, you will be prompted to complete the Context flow.

[Read more about Context and how to use it.](#)

Context is only available for option 1

For now, only option 1: item shouldn't be on the page can be solved with Context and only **if the element is on Salesforce Lightning**.

All other issues submit a ticket.

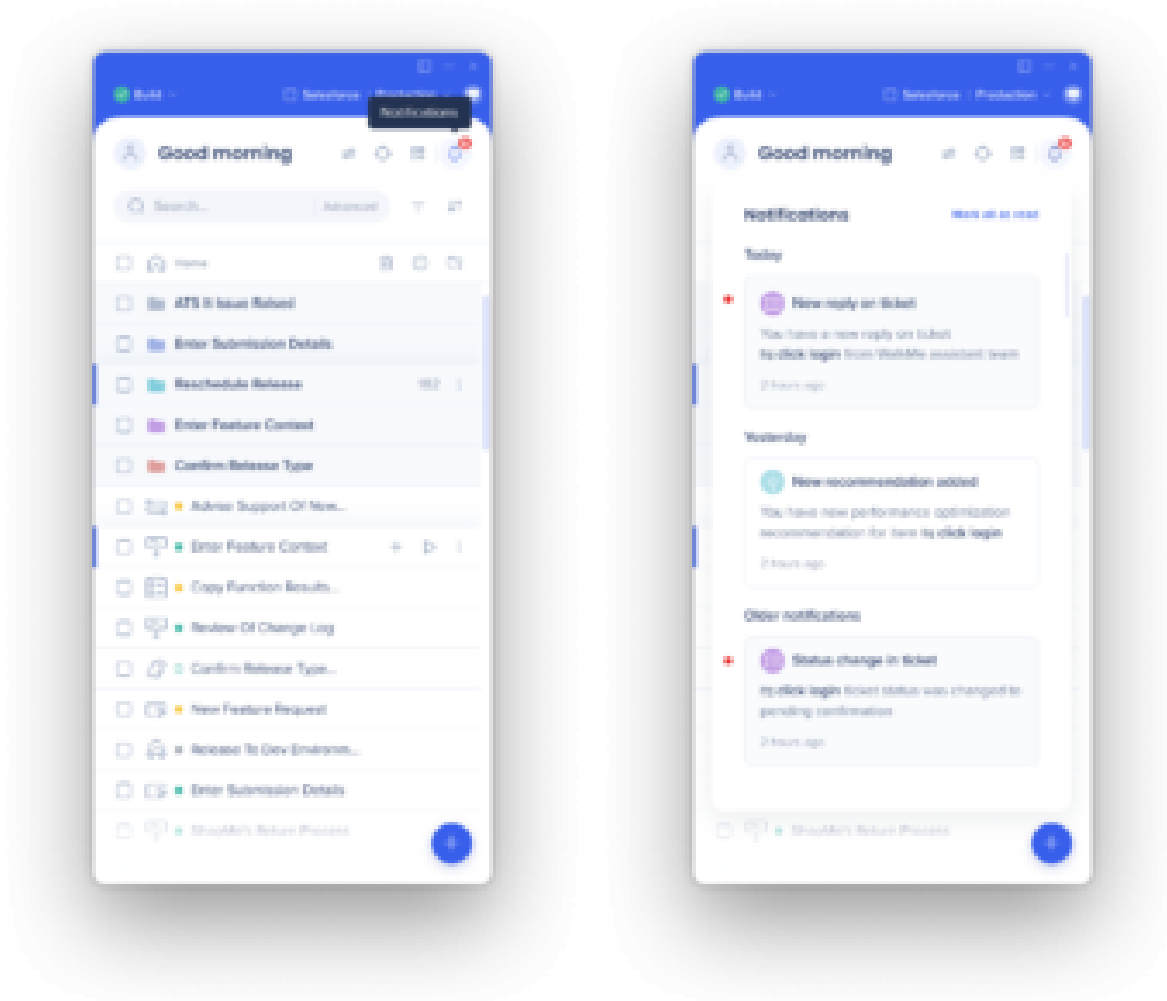
Submitting a ticket

In all other cases, you will review and submit a ticket directly from the Editor. The WalkMe Assistant team will contact you if they need further information.

Once you have submitted your Assistant ticket, you can keep track of it in the Assistant dashboard in the Console. If a support ticket was opened, the case will also be added to the Support Portal in the Community.

Editor notifications

- You will receive notifications in the Editor when a ticket status changes or you have a new message from the Assistant team



Note

The Editor notification will only appear when you are in the same system used to submit the ticket. In the console you can see all ticket information for all of your systems.

Why is my Assist Me button disabled?

If the Assist Me button is disabled, you can hover over it to get an explanation on what to do to re-enable it. There are three reasons it is disabled:

1. **Element isn't captured by DeepUI's Smart Element Recognition (SER).** Before offering a solution, Assistant determines if the item's element is captured by SER. If it isn't, the Assist Me button is disabled and there is a prompt to recapture the element so that it can be

captured by SER. After SER is enabled, the issue you were experiencing might be resolved so check your item again. If it wasn't resolved, click Assist Me to begin the process.

2. **Element is being captured by SER.** If the element was recently captured and is recognized by DeepUI, then the SER needs time to optimize the capture. When the optimization has completed, the button will become clickable. Note however that the issue you were experiencing might be resolved.
3. **A change was made to the item that needs to be saved.** If a change was made to the item or the item's settings, you will be prompted to save.

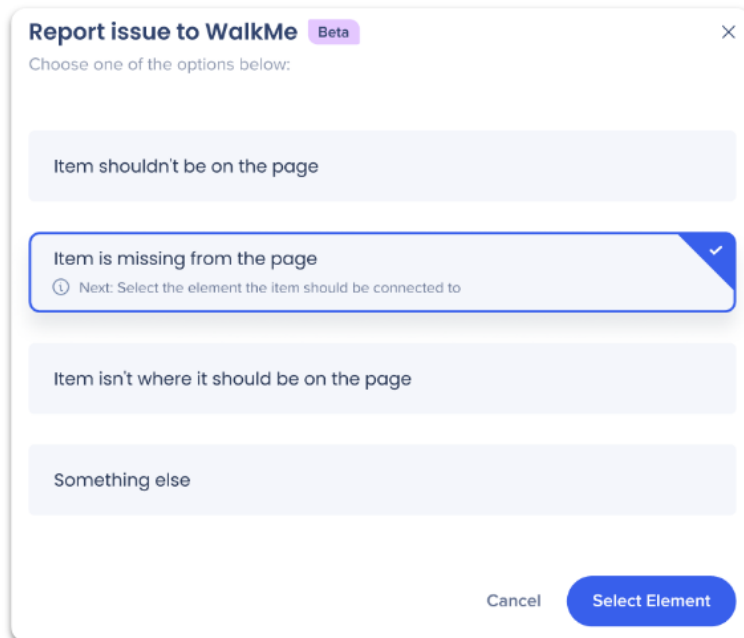
How to Use Assistant

Open the item in the Editor

To begin using Assistant, open the item you need help with in your Editor, and navigate to the page where the item should be (even if it's not there).

Select an issue

After clicking the Assist Me button from the item's settings page, select the option that **best describes the issue** with the item. You can only select one. Then click **Select Element**.



Report issue to WalkMe Beta ×

Choose one of the options below:

Item shouldn't be on the page

Item is missing from the page
ⓘ Next: Select the element the item should be connected to

Item isn't where it should be on the page

Something else

Cancel Select Element

Select Element

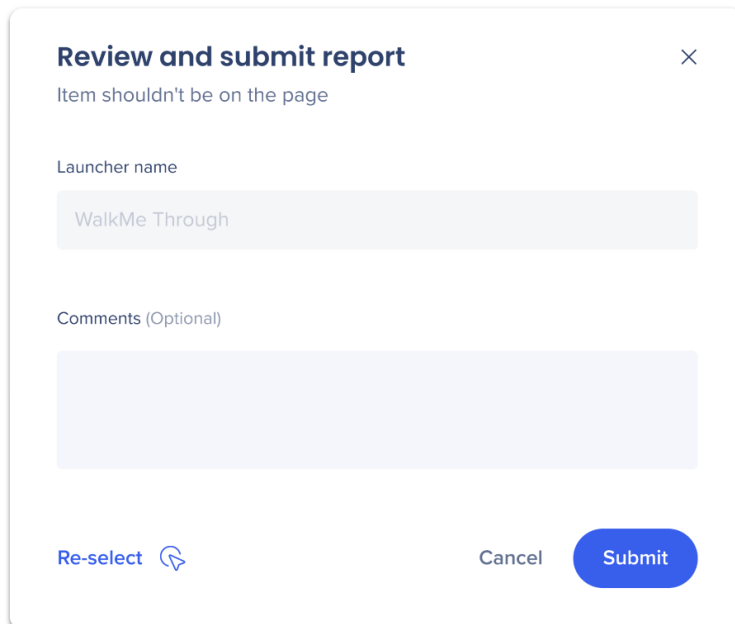
In every case, the next step is to select an element. Refer to the table for which element should be selected.

Issue	Next step
1 Item shouldn't be on the page	Select the element that the item is connected to but shouldn't be.
2 Item is missing from the page	Select the element the item should be connected to.
3 Item isn't where it should be on the page	Select the element the item should be connected to.
4 Something else	Select the element that the item is connected to.

Submit a ticket (options 1-3)

If you chose issue 1 (and Context isn't available), 2, or 3, then a pop-up appears with a short ticket for you to review and submit.

After a ticket is submitted, you can track its progress in the Assistant dashboard in the Console.



The ticket includes the issue you selected, the type of item (for example, a Launcher) and a place for you to add any comments.

- **Comments are optional**, but helpful to the WalkMe Assistant team that will handle the issue. Feel free to add any details on the item's behavior or steps the team can take to reproduce the

issue.

Submit a ticket (option 4)

If none of the other options match the issue, you are prompted to fill in additional information and a support ticket will be submitted on your behalf. You can track the ticket progress in the Assistant dashboard in the Console and in the Support Portal in the Community.

The form consists of three steps and each step requests information about the issue you are experiencing.

Step 1: Details. In this step, the item name will automatically be added. Type in a short one-sentence summary of the issue and click next.

Step 2: Behavior. In the first field, describe how the item is currently behaving (the problematic behavior). In the next field, describe how the item should be behaving (the expected behavior). Click next when you're ready.

Step 3: Steps to reproduce. In the last step, write out the steps to reproduce the issue. This helps the Support team to recreate the issue so they can find a solution. Be as detailed as possible on how the item was built. When you're done, click Submit Support Case.

Something else ×

Submit a support case and track the progress in the [Support Portal](#)

1 Details — 2 Behavior — 3 **Steps to reproduce**

Add 1-8 steps to reproduce the issue

This will help us to recreate the issue and find a solution

For example:

- Create launcher and connect it to the Search bar
- Set display condition to: Time from 13:00 and Time until 14:00
- Save and publish
- Result: The launcher appears all the time

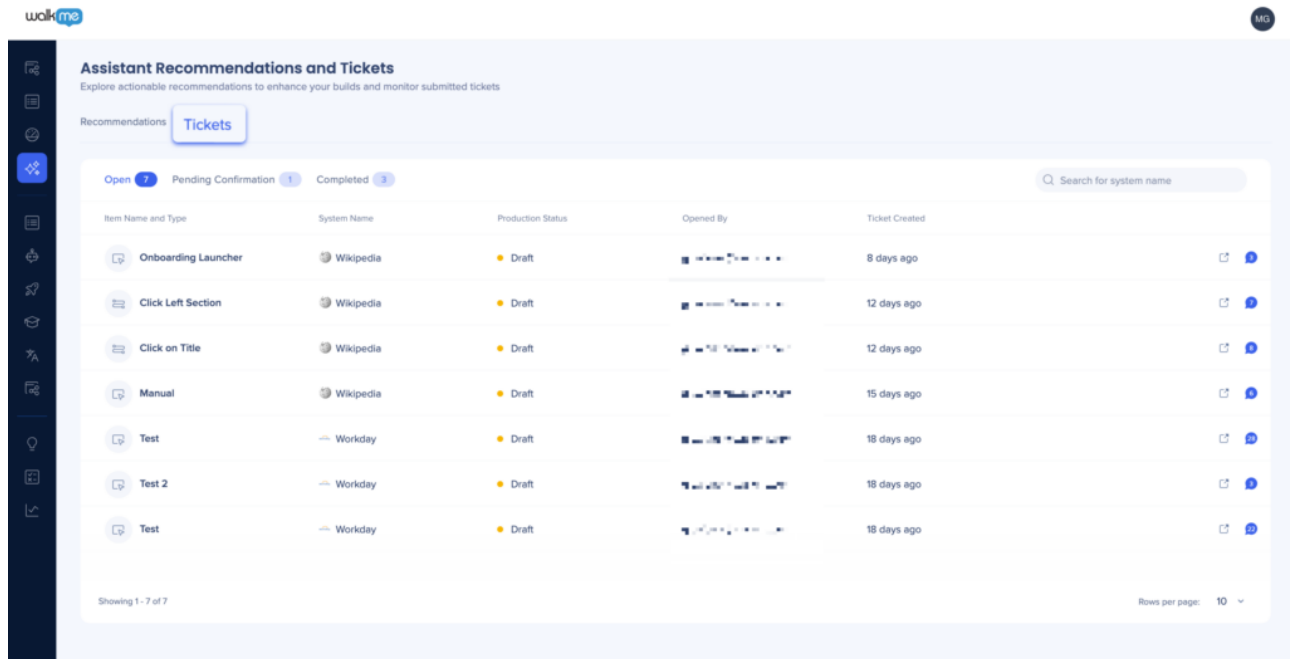
[Back](#) [Submit Support Case](#)

Assistant Ticket Dashboard

The Assistant dashboard in the Console, accessible at console.walkme.com/assistant, provides a central place to view and manage all of your Assistant tickets.

In the **Tickets** tab, you can manage all of your Assistant tickets, including those that are open, pending confirmation, and completed.

You can also filter tickets by system and reporter using the **search bar**.



Note

Users can view tickets only for systems they have access to.

Beta feature

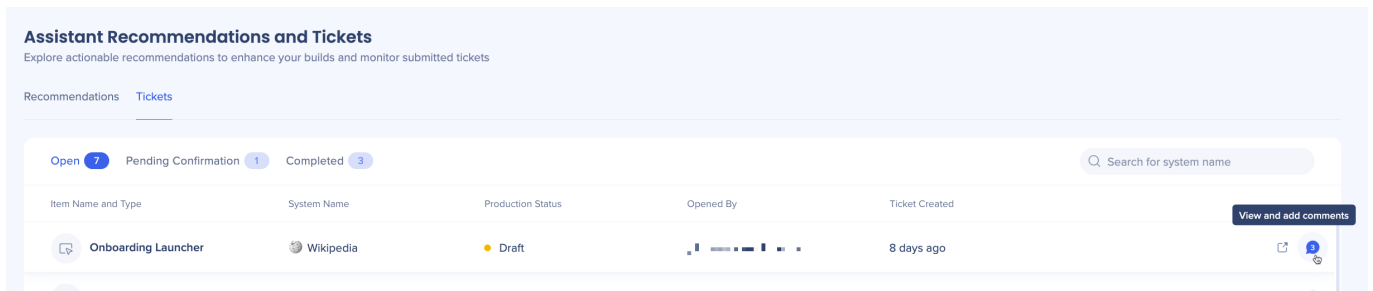
The WalkMe Assistant dashboard and recommendations are currently in beta testing. [Apply now to join the beta.](#)

Communications with Assistant Team

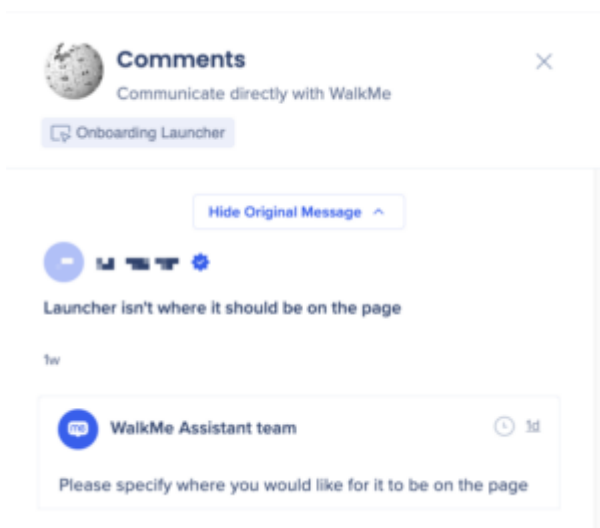
In some cases, it may be necessary for the Assistant team to contact you if they need further information. You can now message with them directly in the console.

Use cases:

- View any comments you added while reporting the ticket
- Communicate with the Assistant team on your tickets directly within the product
- Provide additional feedback before accepting solutions



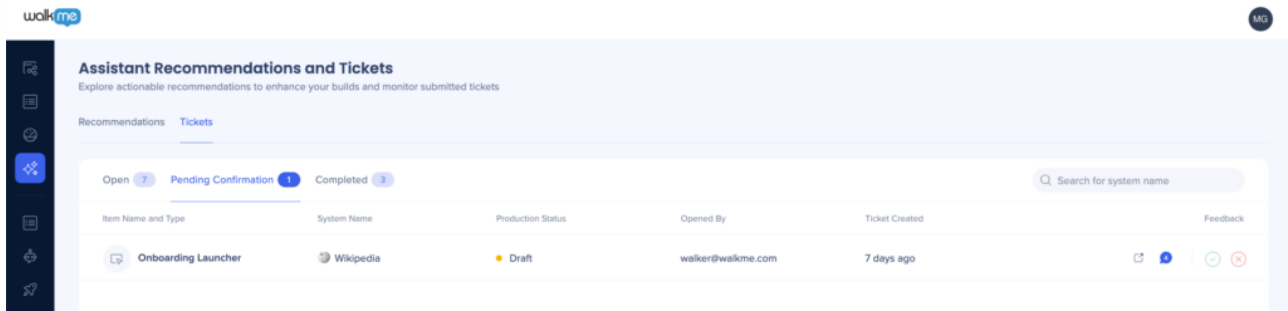
1. Click the **message bubble** to open the current conversation for you to review
2. Add a new message by clicking the **+ Add Message** button



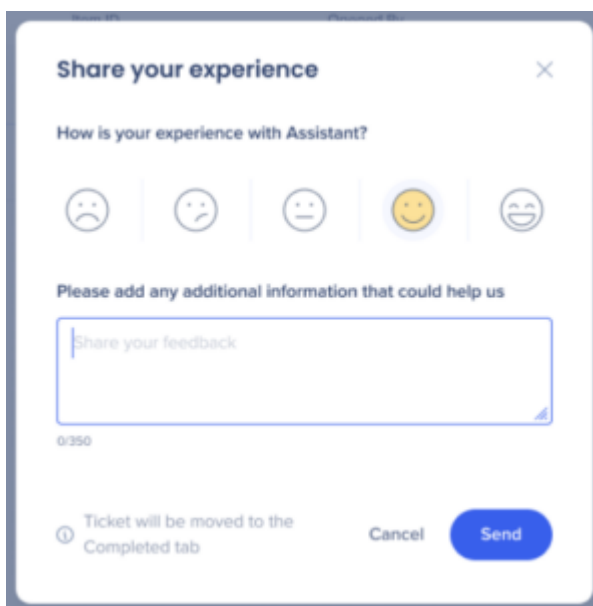
Ticket Confirmation

Before resolving an open Assistant ticket, tickets will move to the **Pending Confirmation** tab where you can choose to accept or reject a solution.

- Click the **Green check mark** to accept
- Click the **Red X** to reject



Once you accept a solution, the ticket will move to the **Completed** tab and you will be able to rate your experience using Assistant.



If you reject a solution you will be asked to provide more information and the ticket will go back to the **Open** tab.