

How To Connect To a Conversation From a Smart Walk-Thru

Brief Overview

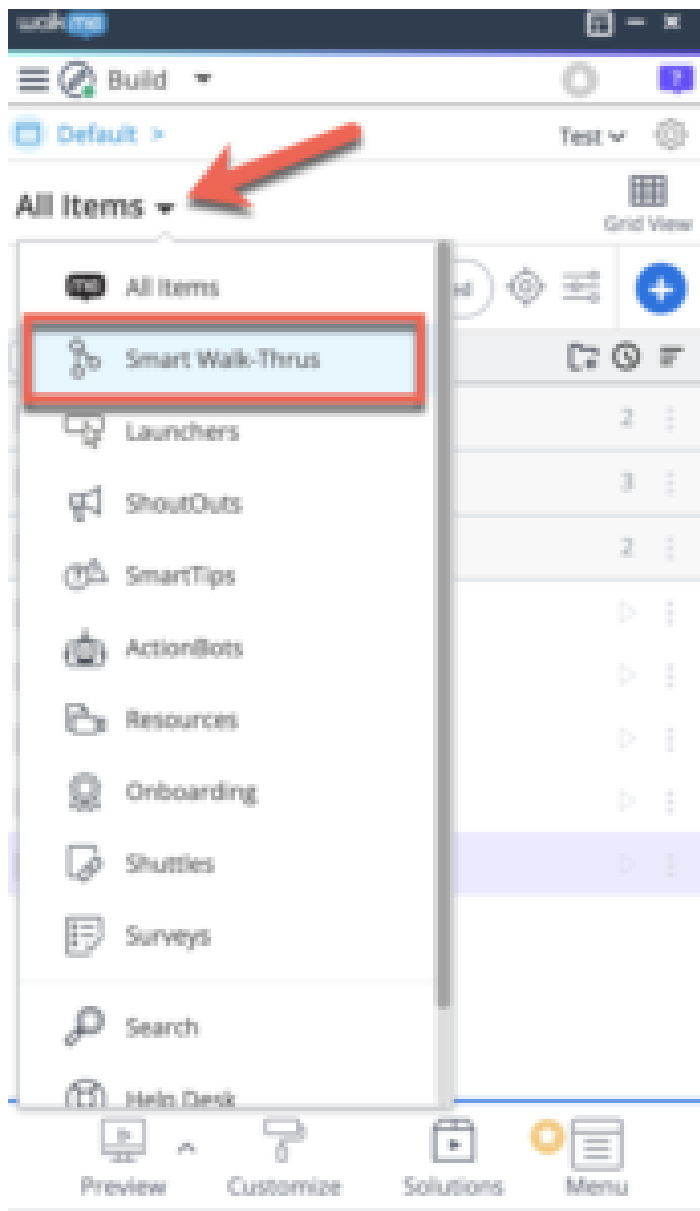
Smart Walk-Thrus are your key to WalkMe automation! Creating automation is even easier with the new Smart Walk-Thru Initiator: **Conversations**. Using this Initiator, it's easy to provide a Smart Walk-Thru with input from your users before it is launched. After a user provides all relevant data for the Smart Walk-Thru, it will begin and do everything for him/her.

With the ActionBot Conversation Initiator, it's easy to turn any Smart Walk-Thru into a full ActionBot, improving your customers' user experience and letting them use a unified conversational Bot UI that performs automated tasks for them.

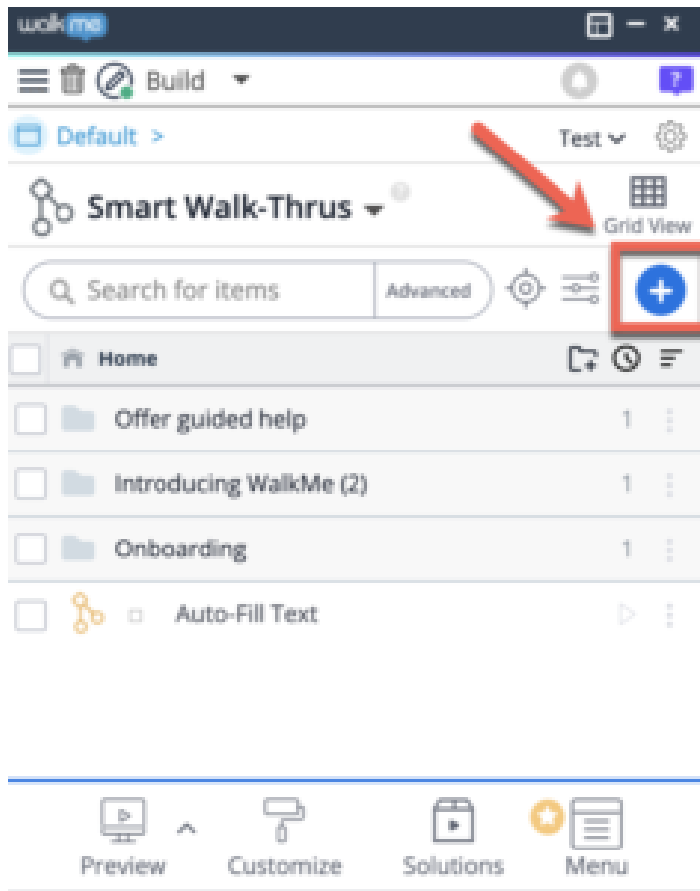
Steps for Connecting a Smart Walk-Thru to a Conversation

Step 1: Sign into your WalkMe Editor account

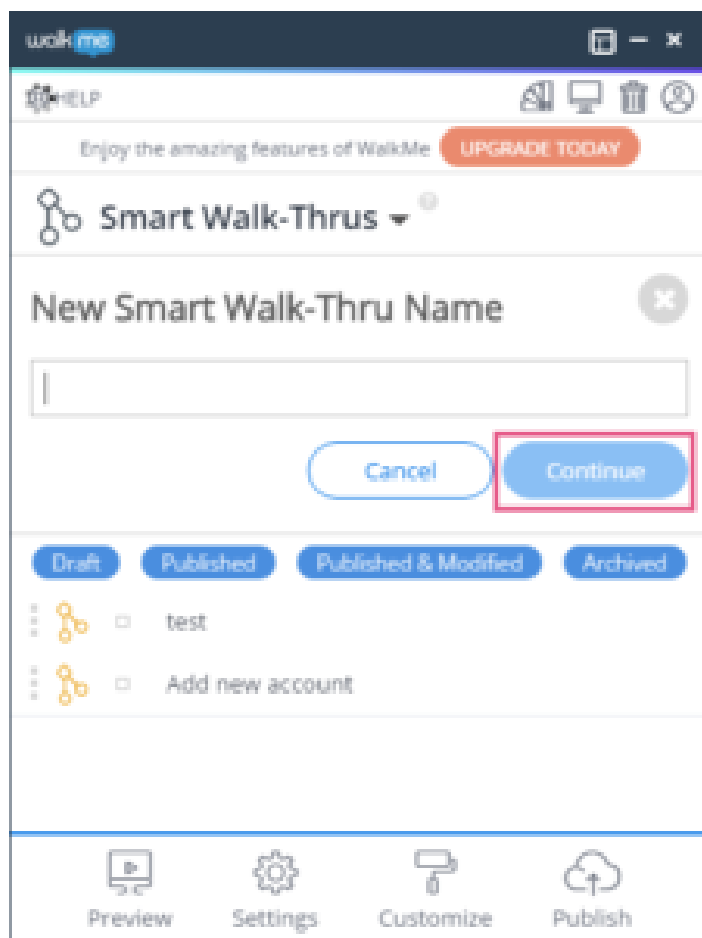
Step 2: Click the WalkMe apps dropdown triangle and select the *Smart Walk-Thrus* app:



Step 3: Click the + icon in the right-hand corner to create a new Smart Walk-Thru

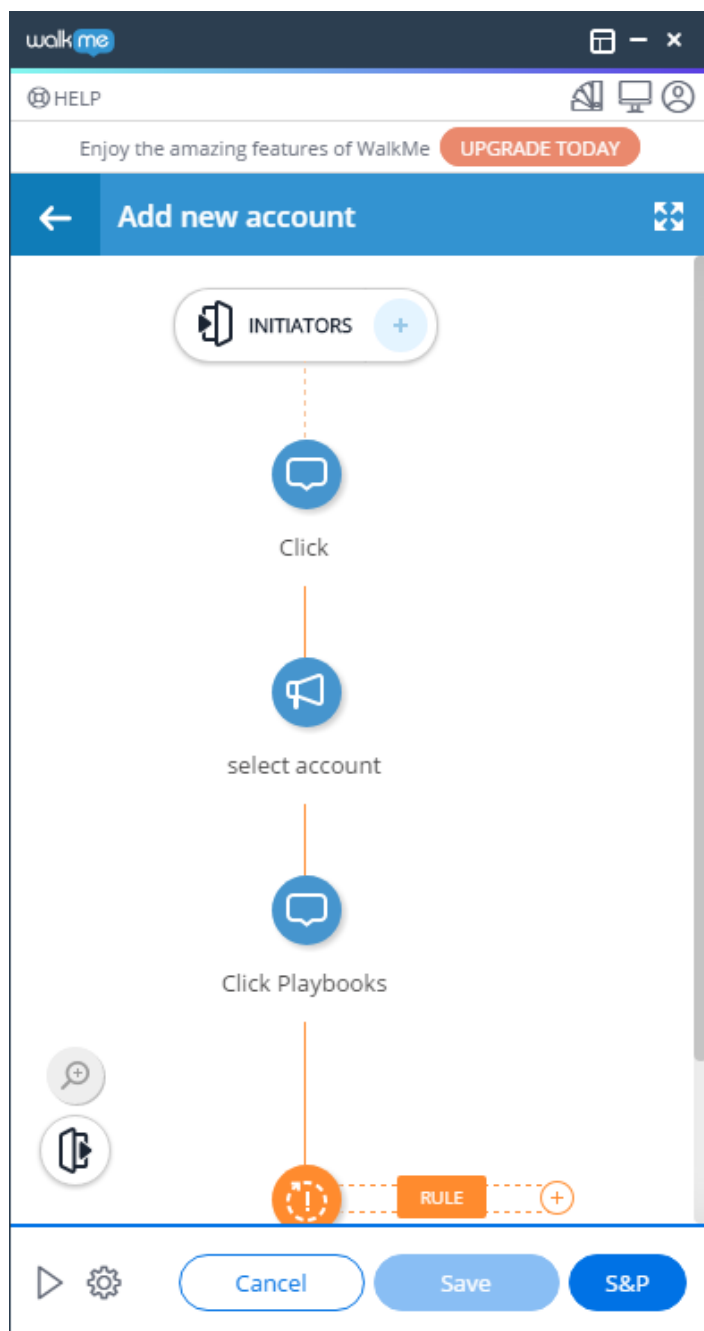


Step 4: Give your Smart Walk-Thru a name and click *Continue*



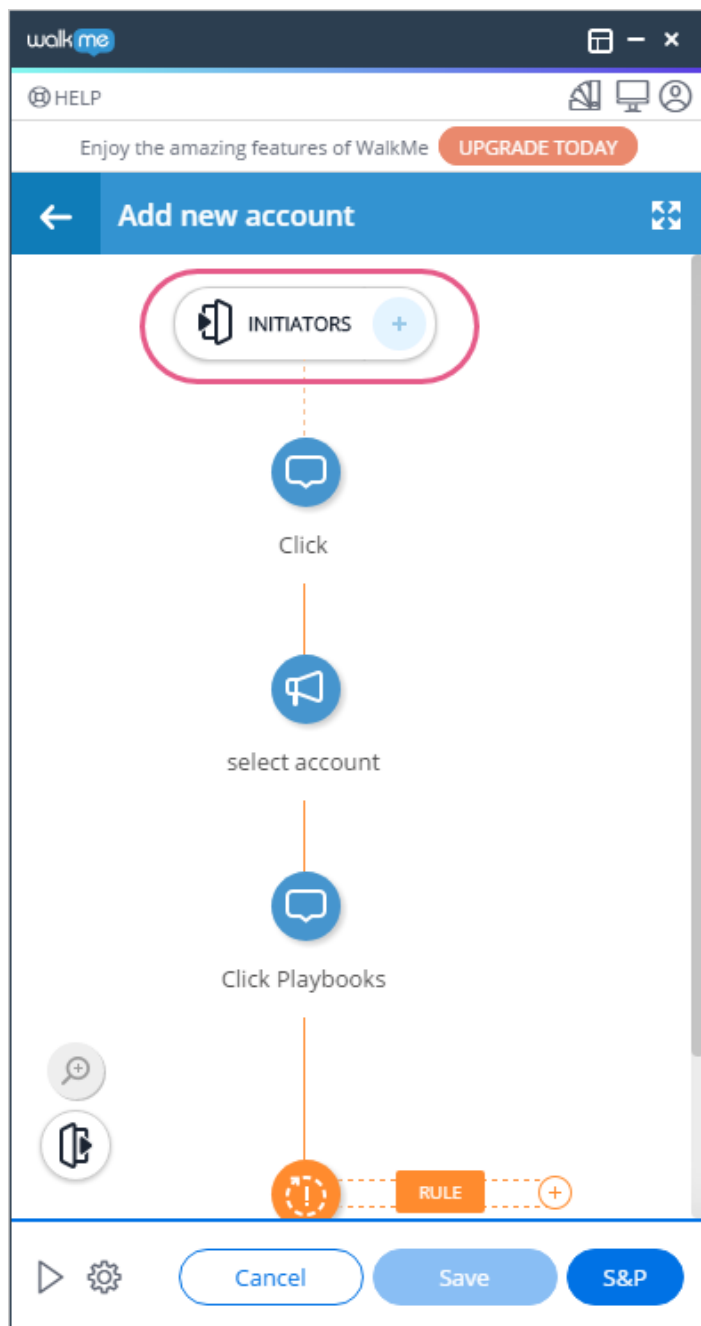
- The name you provide will be used as the name of a process in the ActionBot chat dialogue box, so please use the process you will be performing as the name of the Smart Walk-Thru; you can also have the opportunity to change the name in Step 8 below;
- Additionally, the Smart Walk-Thru name will be parsed into Keywords. If an end-user types any of the Keywords into the ActionBot chat dialogue, this Smart Walk-Thru will be given as a suggestion.

Step 5: Create all of the Steps required for the use case

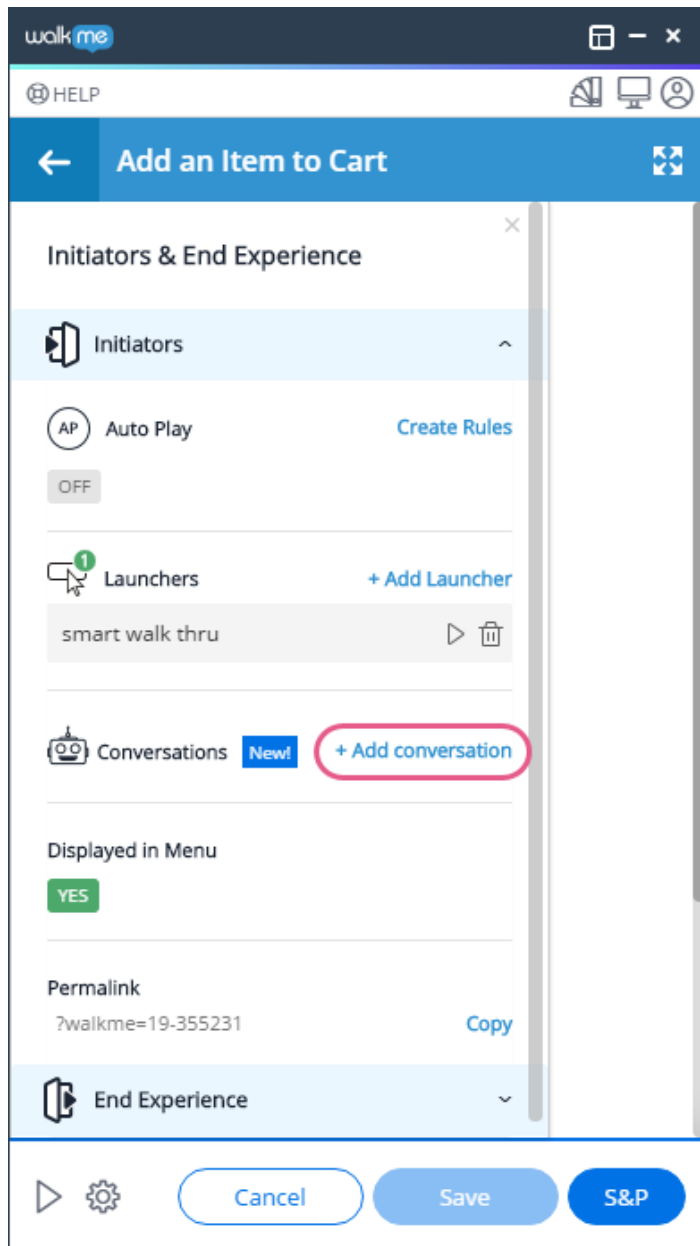


- If you do not use any Auto-Steps, the ActionBot will essentially act like a glorified Launcher;
- If you include Auto-Steps (strongly recommended) the ActionBot will launch the Smart Walk-Thru, which will then automate a process for your end-users;
 - The ActionBot will create a question for each Fill Text and Select List Value Auto-Step you include.
 - If you use the Fill Text or Select List Value Auto-Steps, write any value you want for each Step.
 - The ActionBot will later replace these values with unique variables, which you can review in the Advanced Settings section.

Step 6: Click *INITIATORS* at the top of your Smart Walk-Thru flow



Step 7: Click + *Add conversation*



- If you have not saved your Smart Walk-Thru yet, you will need to click *Save & Continue*;
- At this point WalkMe will pre-populate a popup with the name of the Conversation (the same as the name of Smart Walk-Thru), and each noun and verb of the title as Keywords;
- You can now change the name and/or Keywords if you wish.

Step 8: Click the Bot to Add This Conversation To dropdown menu and either choose an existing Bot or create a new Bot

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Add Conversation - Step 1

Name your Conversation and assign it to a Bot

Name ⓘ

Keyword To Search By (Intent) ⓘ

Bot to Add This Conversation To

CANCEL

CONTINUE TO STEP 2

- If you do not have a pre-existing Bot, you will not see this menu and a new Bot will be created for you automatically;
- If you select + Add New Bot, you will need to give you new Bot a name.

Step 9: Click **CONTINUE TO STEP 2**

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Add Conversation - Step 1

Name your Conversation and assign it to a Bot

Name ⓘ

Keyword To Search By (Intent) ⓘ

Bot to Add This Conversation To

CANCEL

CONTINUE TO STEP 2

- If you included Fill Text or Select List Value Auto-Steps in your Smart Walk-Thru, proceed to Step 10;
- If you did not include those types of Auto-Steps in your Smart Walk-Thru, skip Step 12 and

- You should write one question for each Auto-Step.

Step 11: Click **FINISH & CONTINUE TO CONVERSATION**

[← Back to step 1](#)×

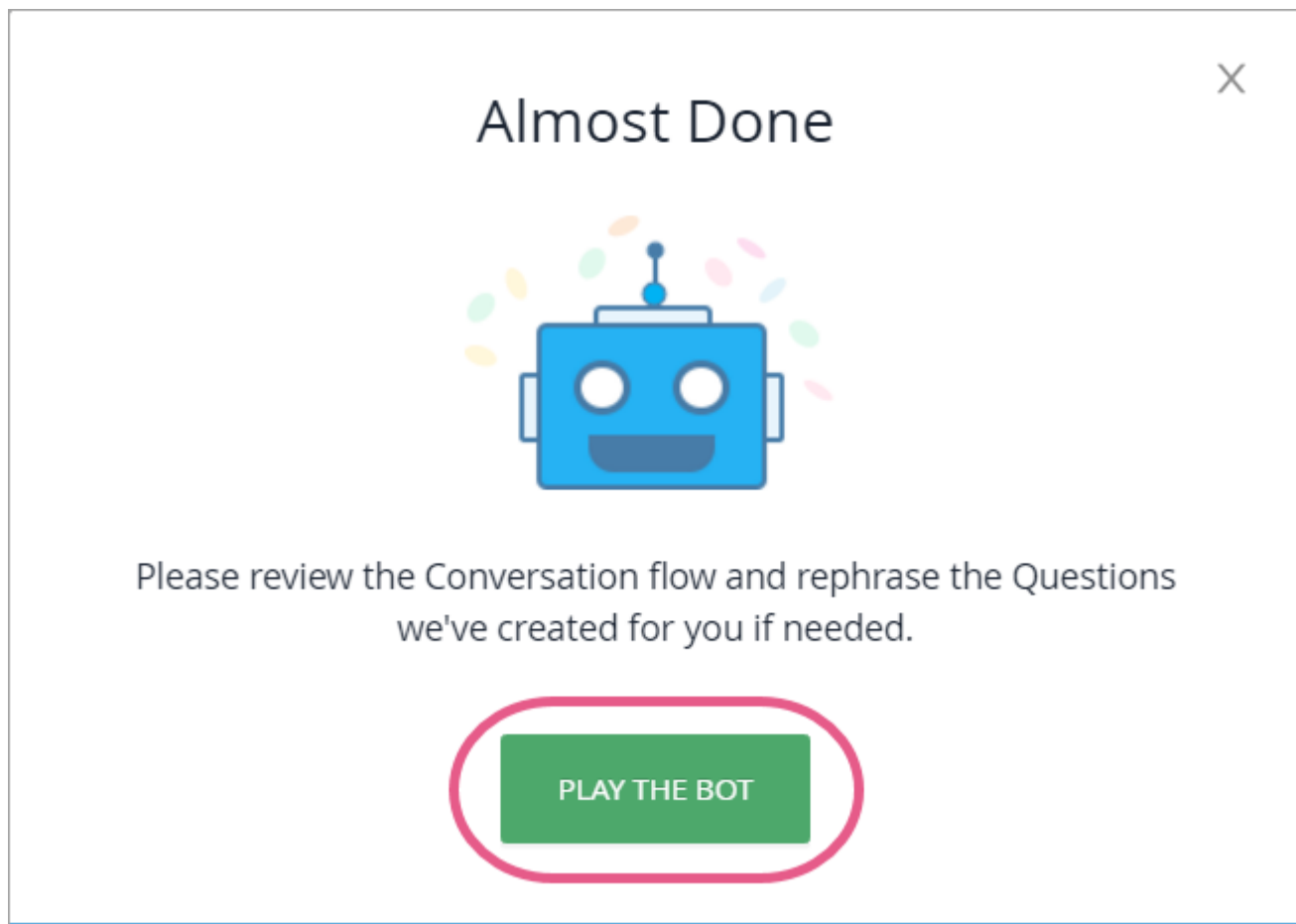
Add Conversation - Step 2

We will convert the following Smart Walk-Thru Steps into Conversation questions. Please review the question text and adjust if needed.

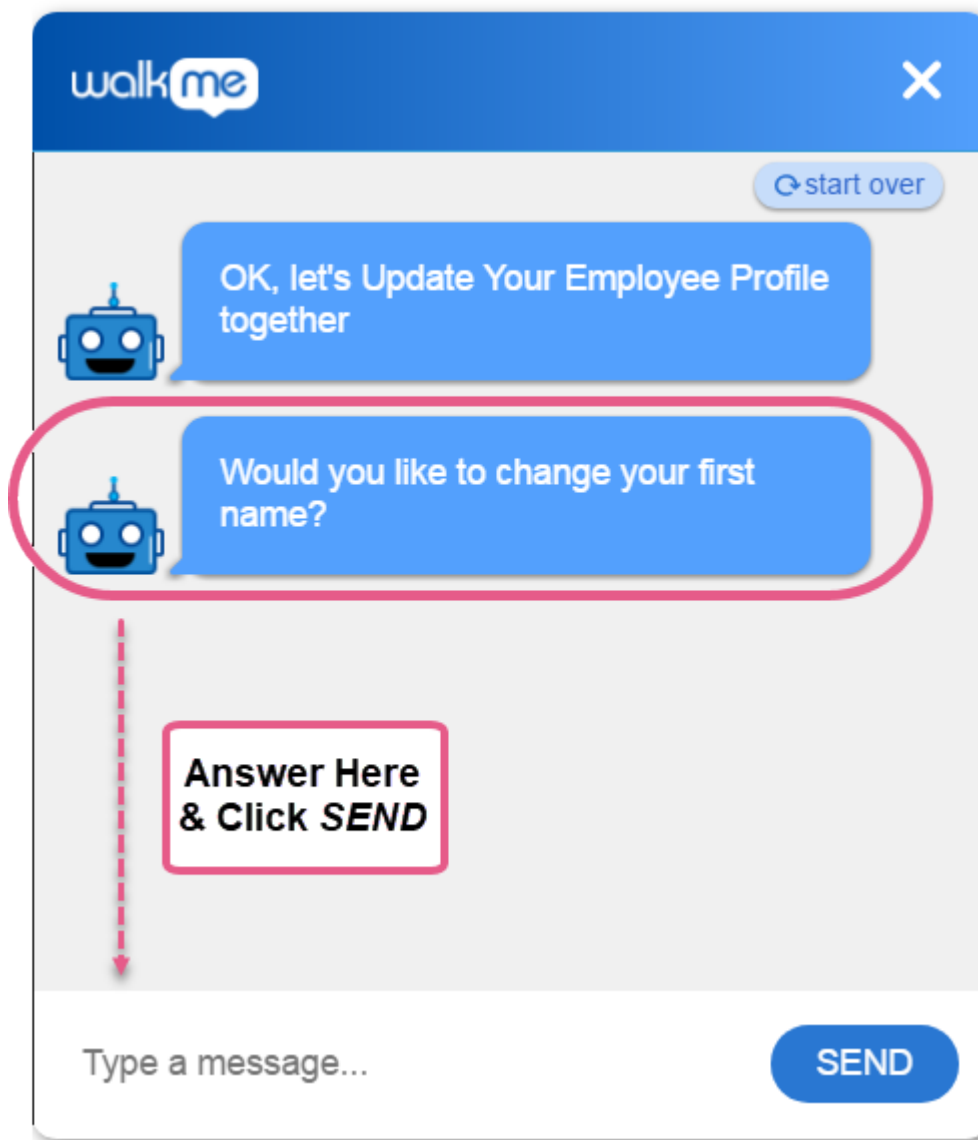
Smart Walk-Thru Step name	New question text and name
#4 Fill Step: First Name →	<input type="text" value="Would you like to change your first"/>
#5 Fill Step: Middle Name →	<input type="text" value="Would you like to add/change your"/>

[Advanced Settings](#)

Step 12: Click **PLAY THE BOT** to preview the Bot from within the application



Step 13: Answer the Bot's question(s) as though you were the end-user



- The Bot will now show you the value(s) it extracted from your answer, which, were you an end-user, would be sent to the Smart Walk-Thru to automate a process:



If an end-user were having this Conversation with the ActionBot, the below extracted values would be sent to the connected Smart Walk-Thru for use in automating a process for him/her.

The values collected during the conversation are:


Key	Extracted Value
Fill_Step :_First_ Name	Clark
Fill_Step :_Middl e_Name	J

Step 14: Go through each Conversation step and alter the text to your liking

Step 15: Test your Smart Walk-Thru-to-Conversation flow

- Click *BACK TO SMART WALK-THRU*:

walkmeBeta



Bots

Conversations

Connections

ActionBots

BACK TO SMART WALK-THRU

← ConversationsGuide me


Update Your Employee Profile

ADD MESSAGE

ADD QUESTION

ADD CONDITION

ADD ACTION

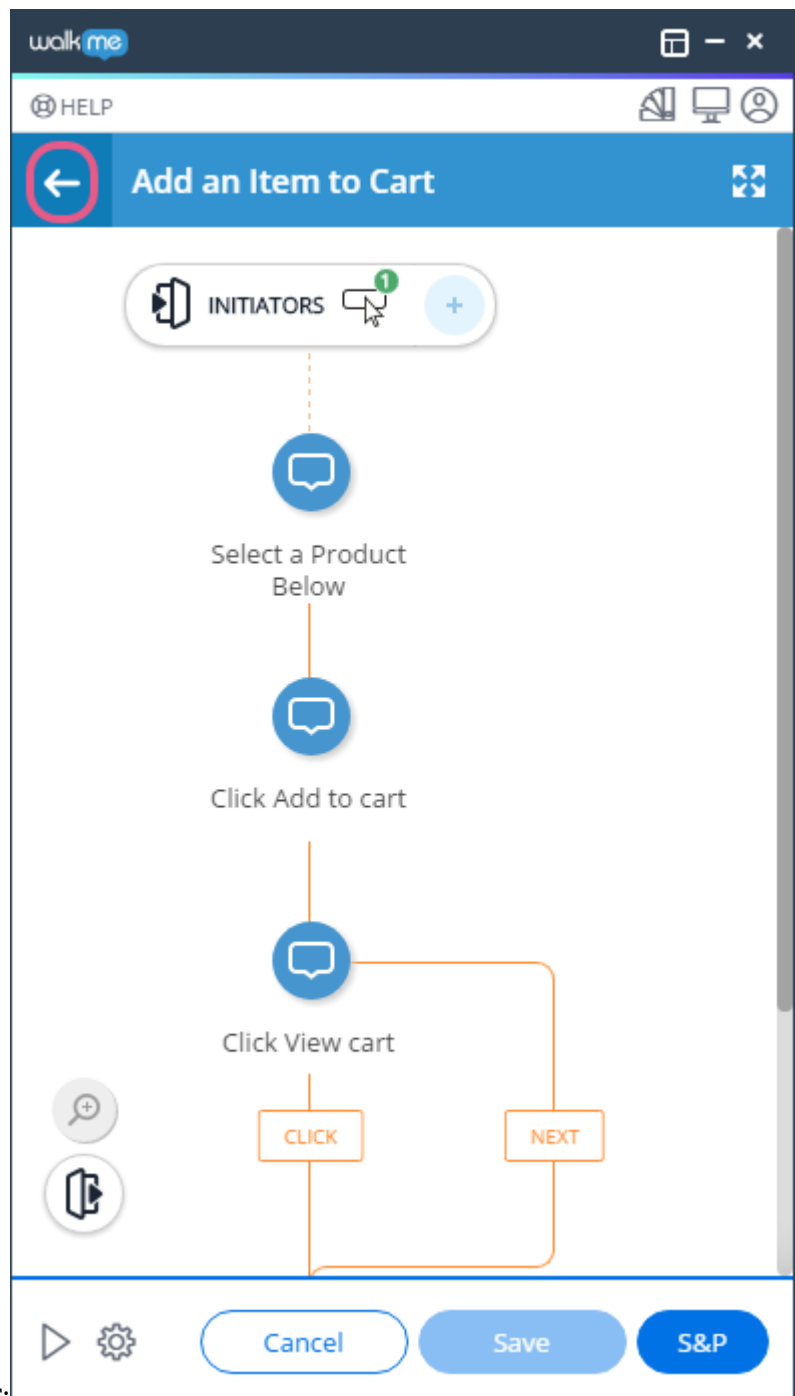
Type	ID	Name	Next step	Actions
...	97068	Initial Message	Fill Step: First Name	
?	97069	Fill Step: First Name	Fill Step: Middle Name	
?	97070	Fill Step: Middle Name	Trigger Smart Walk-Thru	
	97071	Trigger Smart Walk-Thru		

UNPUBLISH

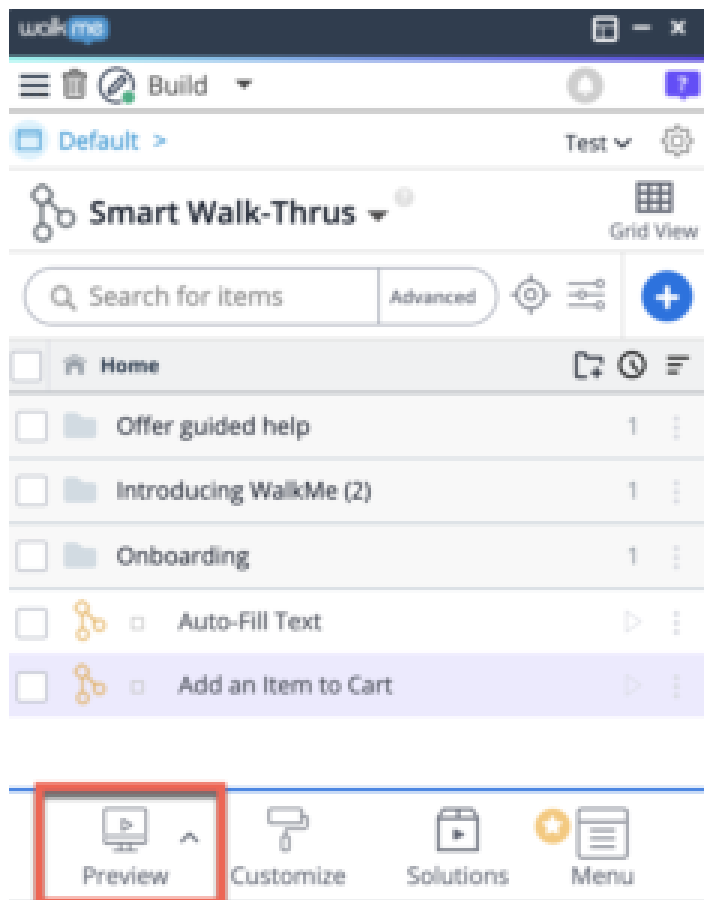
Publish Status

PLAY CONVERSATION

PUBLISH



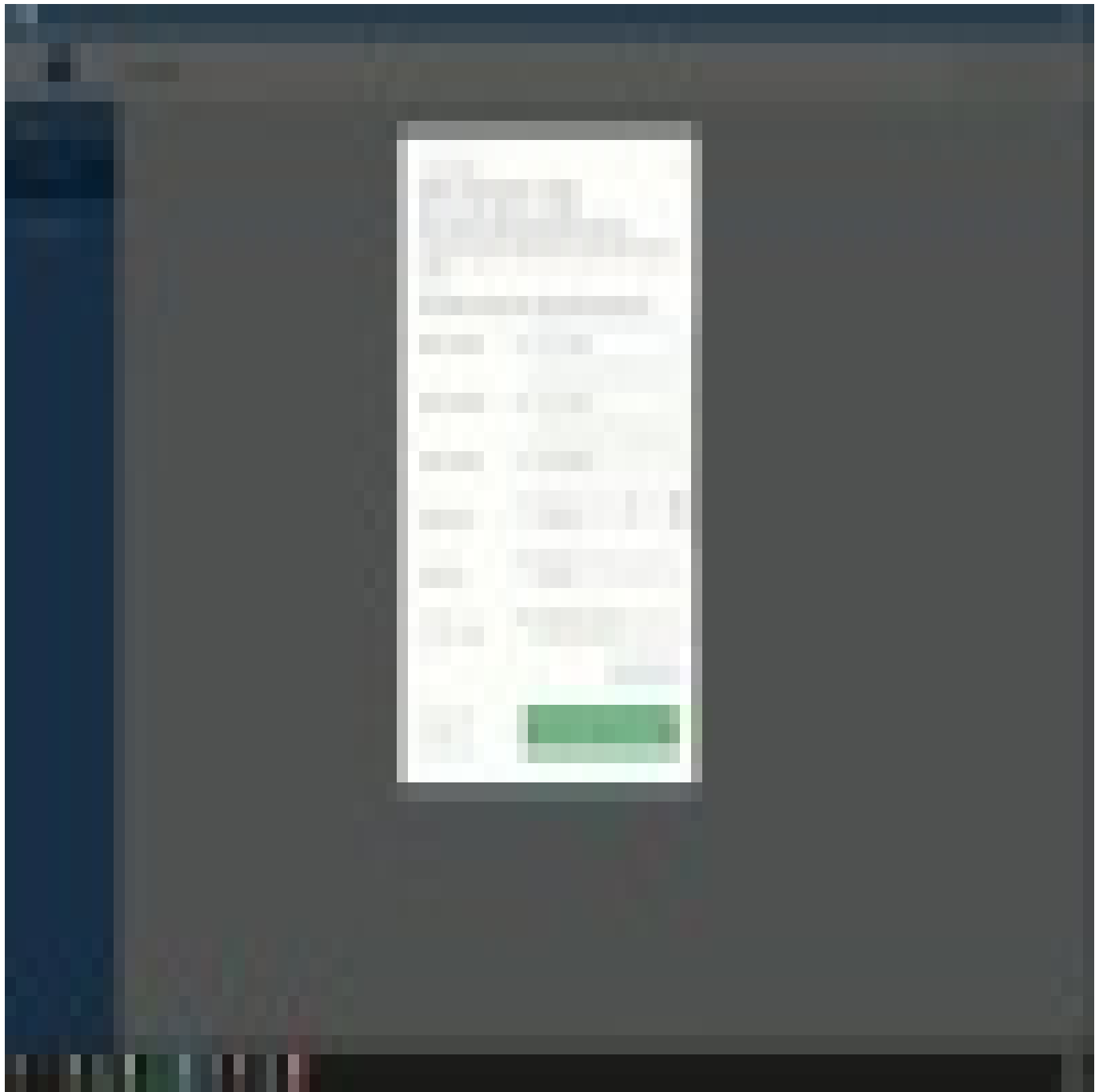
- Click the back arrow on the Editor:
- And click *Preview* in the blue Admin Bar at the bottom of the Editor:



That's it! You're now a BOT master!

Tip Tuesday Videos

You can also view a video created by a member of WalkMe's Solution Engineering team showing you how to easily create ActionBot Conversations from an automated Smart Walk-Thru below:





To see more Tip Tuesday videos on WalkMe World [click here](#).