

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

Brief Overview

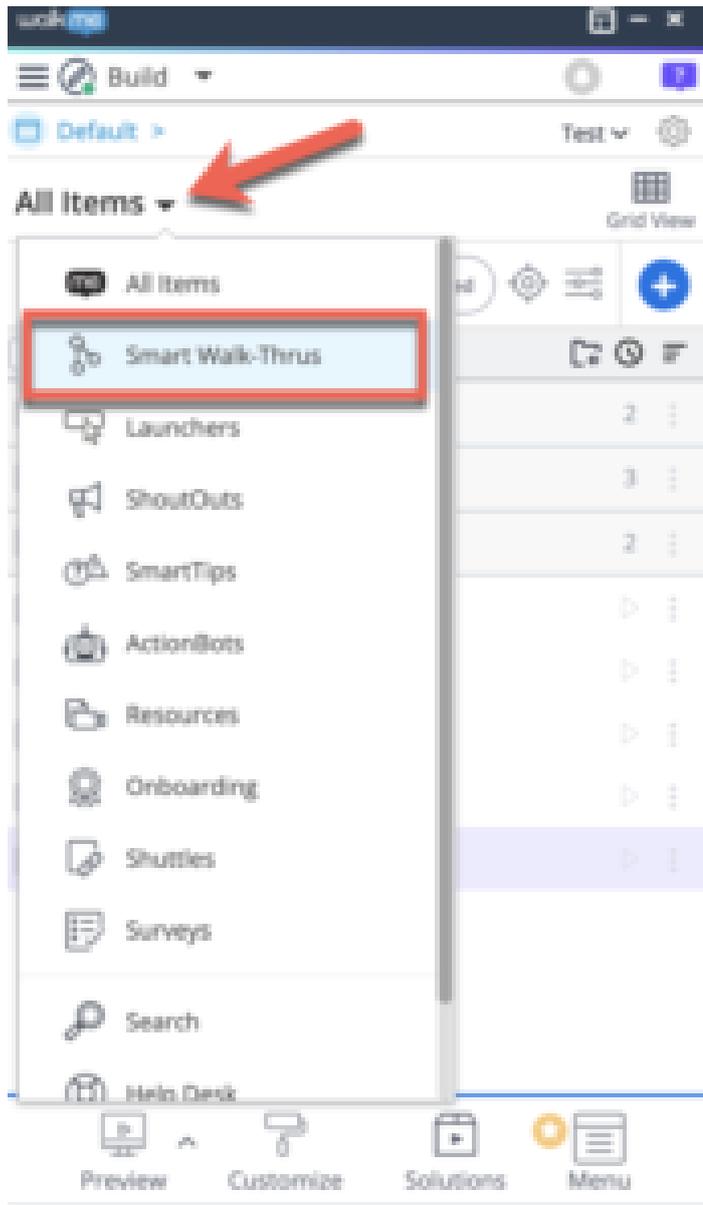
Smart Walk-Thrus are your key to WalkMe automation! Creating automation is even easier with the new Smart Walk-Thru Initiator: **Conversations**. Using this Initiator, it's easy to provide a Smart Walk-Thru with input from your users before it is launched. After a user provides all relevant data for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

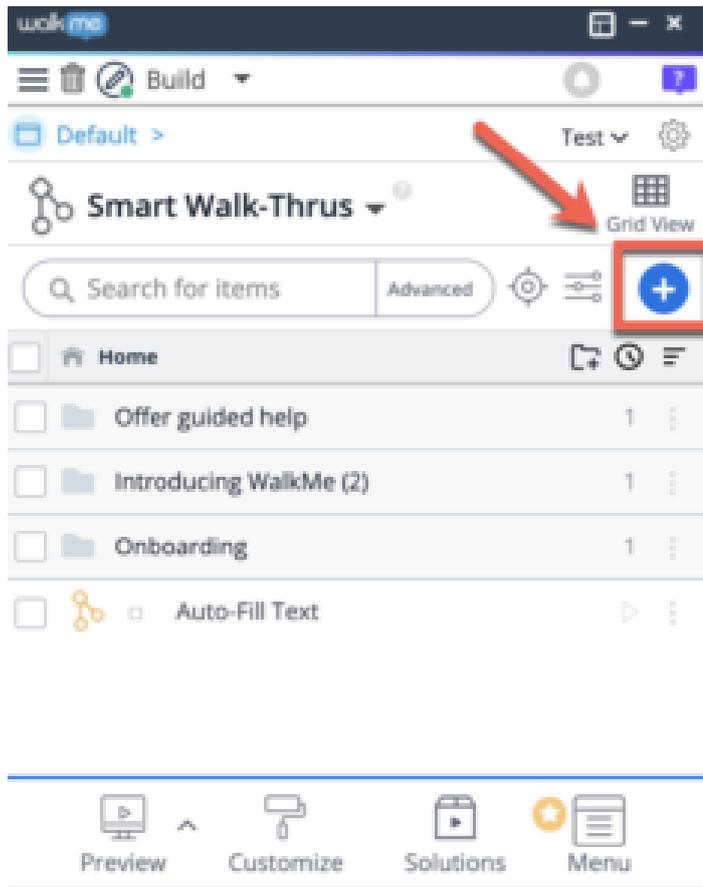
Steps for Connecting a Smart Walk-Thru to a Conversation

Step 1: Sign into your WalkMe Editor account

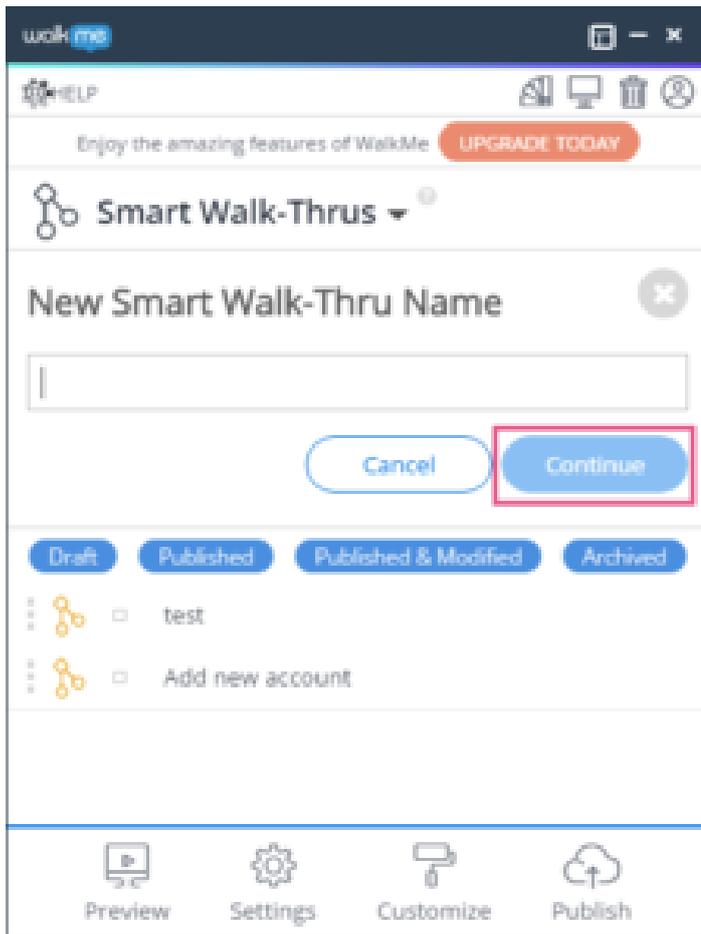
Step 2: Click the WalkMe apps dropdown triangle and select the *Smart Walk-Thrus* app:



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

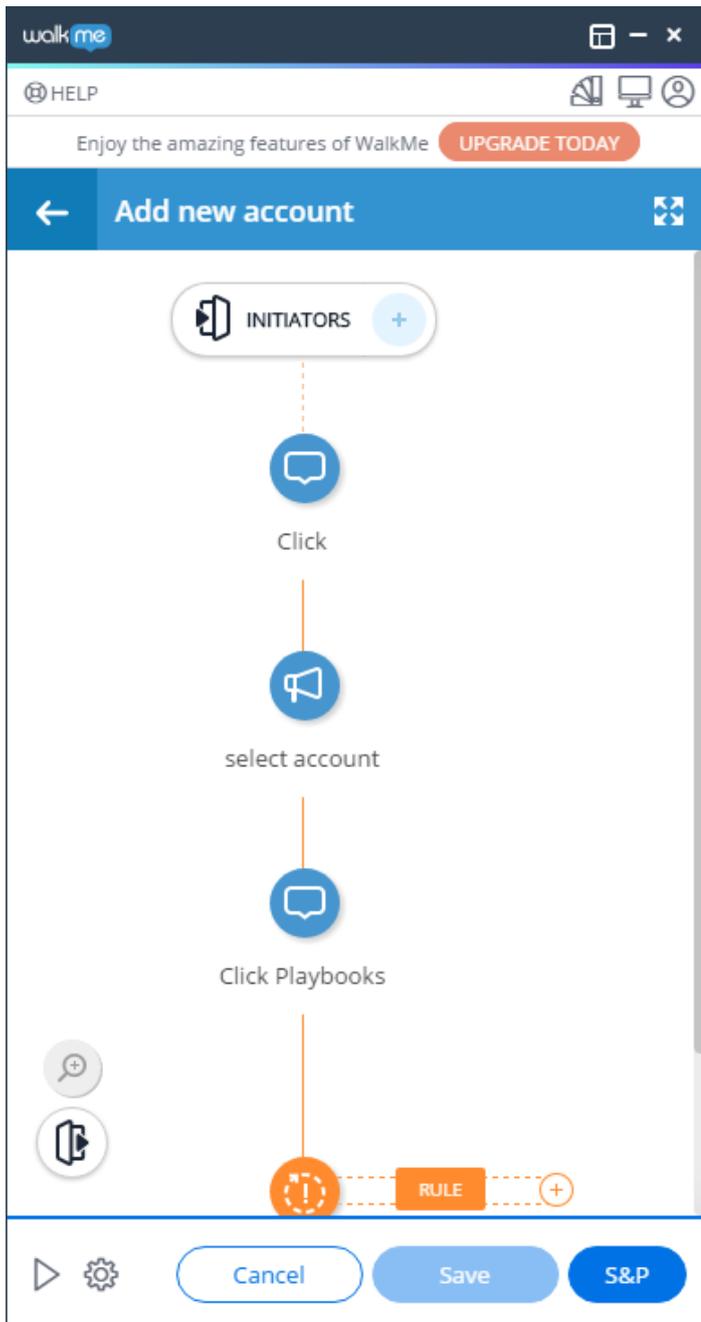


Step 4: Give your Smart Walk-Thru a name and click *Continue*



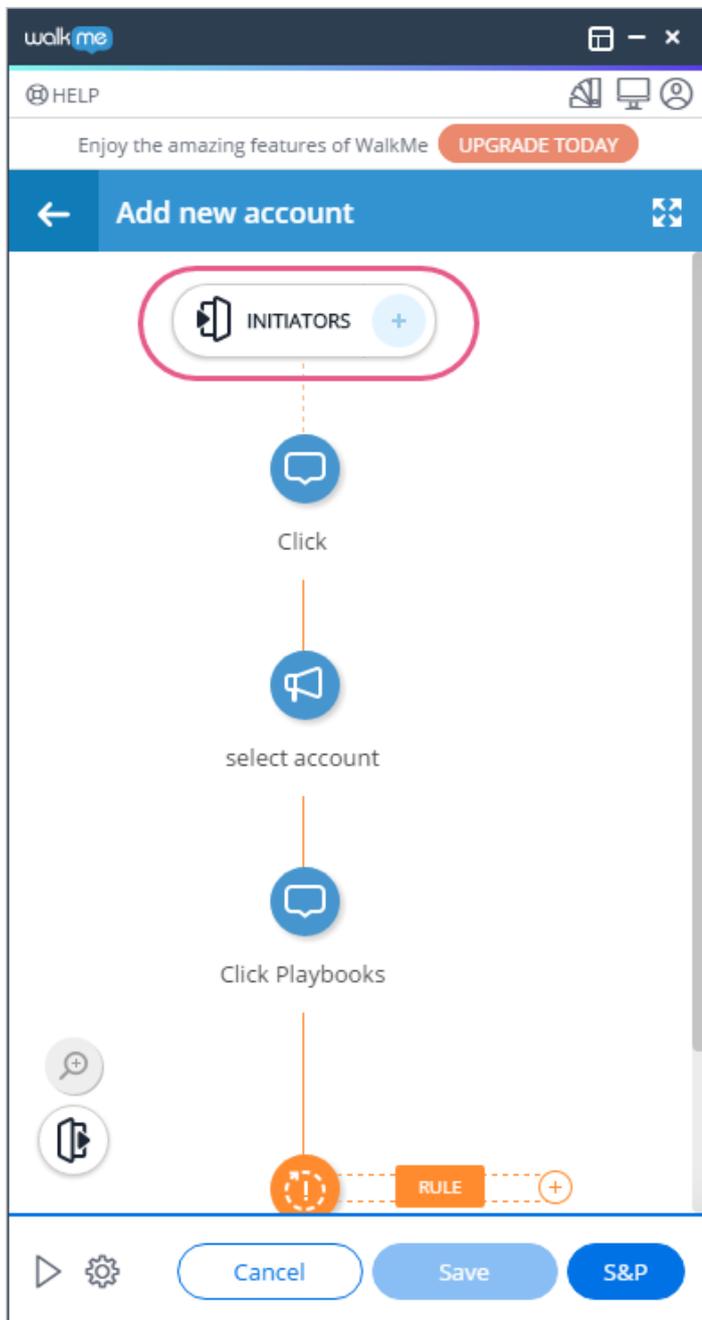
- The name you provide will be used as the name of a process in the ActionBot chat dialogue box, so please use the process you will be performing as the name of the Smart Walk-Thru; you can also have the opportunity to change the name in Step 8 below;
- Additionally, the Smart Walk-Thru name will be 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

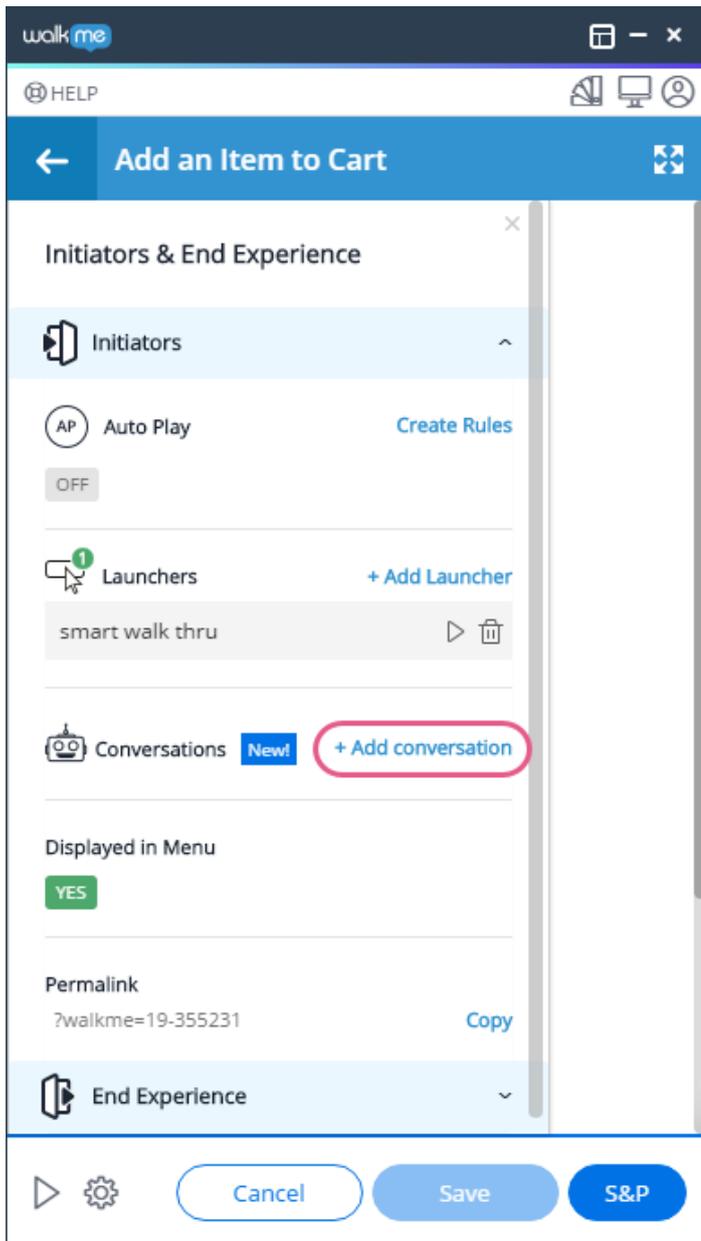


- If you do not use any Auto-Steps, the ActionBot will essentially act like a glorified Launcher;
- If you include Auto-Steps (strongly recommended) the ActionBot will launch the Smart Walk-Thru, which will then automate a process for your end-users;
 - The ActionBot will create a question for each Fill 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

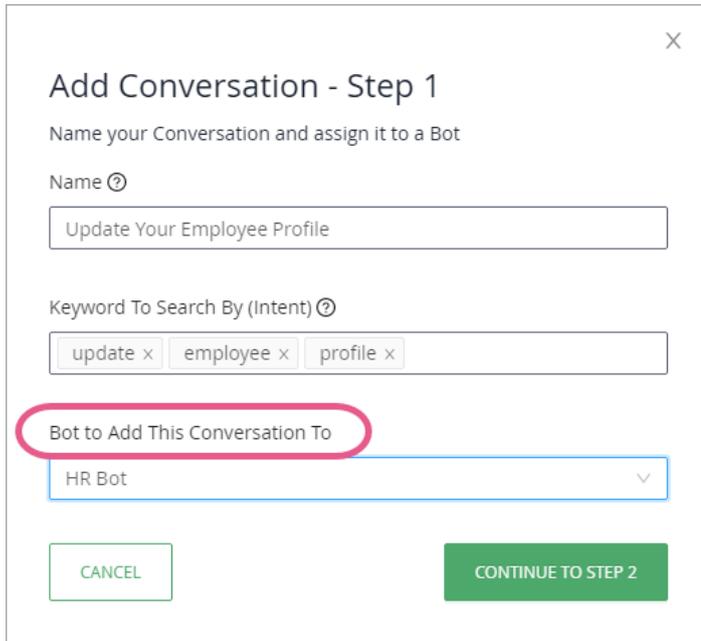


Step 7: Click + *Add conversation*



- 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



Add Conversation - Step 1

Name your Conversation and assign it to a Bot

Name ⓘ

Update Your Employee Profile

Keyword To Search By (Intent) ⓘ

update x employee x profile x

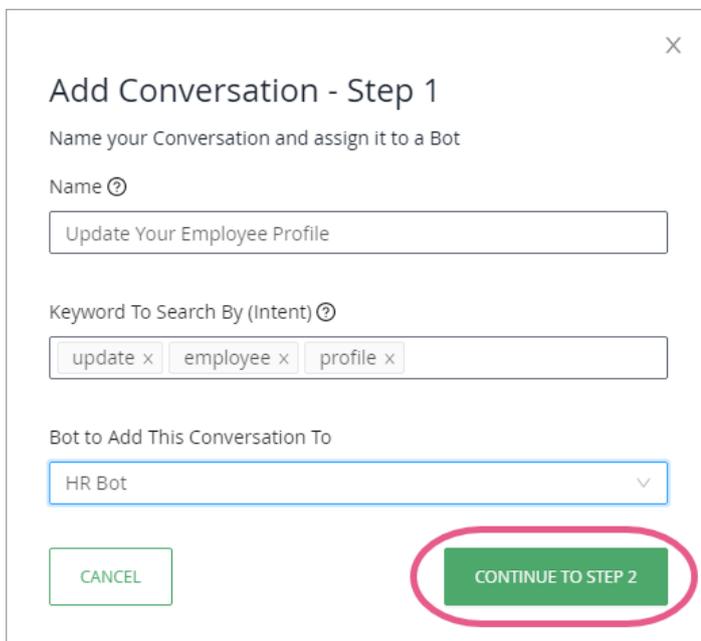
Bot to Add This Conversation To

HR Bot

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**



Add Conversation - Step 1

Name your Conversation and assign it to a Bot

Name ⓘ

Update Your Employee Profile

Keyword To Search By (Intent) ⓘ

update x employee x profile x

Bot to Add This Conversation To

HR Bot

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

move directly to Step 12.

Step 10: Re-write the question text that will appear to your end-users

Smart Walk-Thru Step numbers and names

Smart Walk-Thru Step name	New question text and name
#4 Fill Step: First Name	Fill Step: First Name
#5 Fill Step: Middle Name	Fill Step: Middle Name

Original question values (identical to Step names)

New questions we've written over the old values

Smart Walk-Thru Step name	New question text and name
#4 Fill Step: First Name	Would you like to change your first name?
#5 Fill Step: Middle Name	Would you like to add/change your middle name?

Both screenshots include a 'Back to step 1' link, a 'CANCEL' button, and a 'FINISH & CONTINUE TO CONVERSATION' button. An 'Advanced Settings' link is also present in both.

- 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

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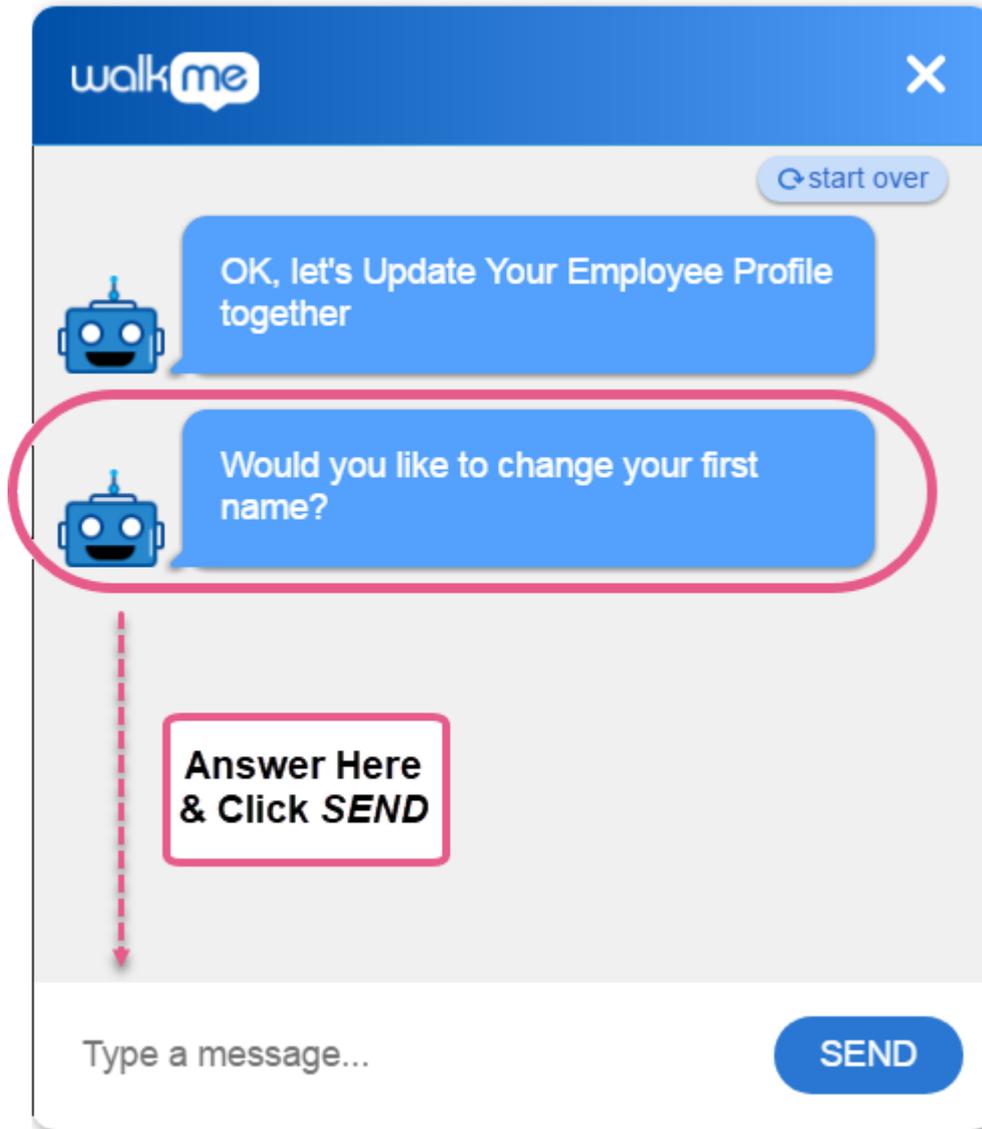
Almost Done



Please review the Conversation flow and rephrase the Questions we've created for you if needed.

PLAY THE BOT

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

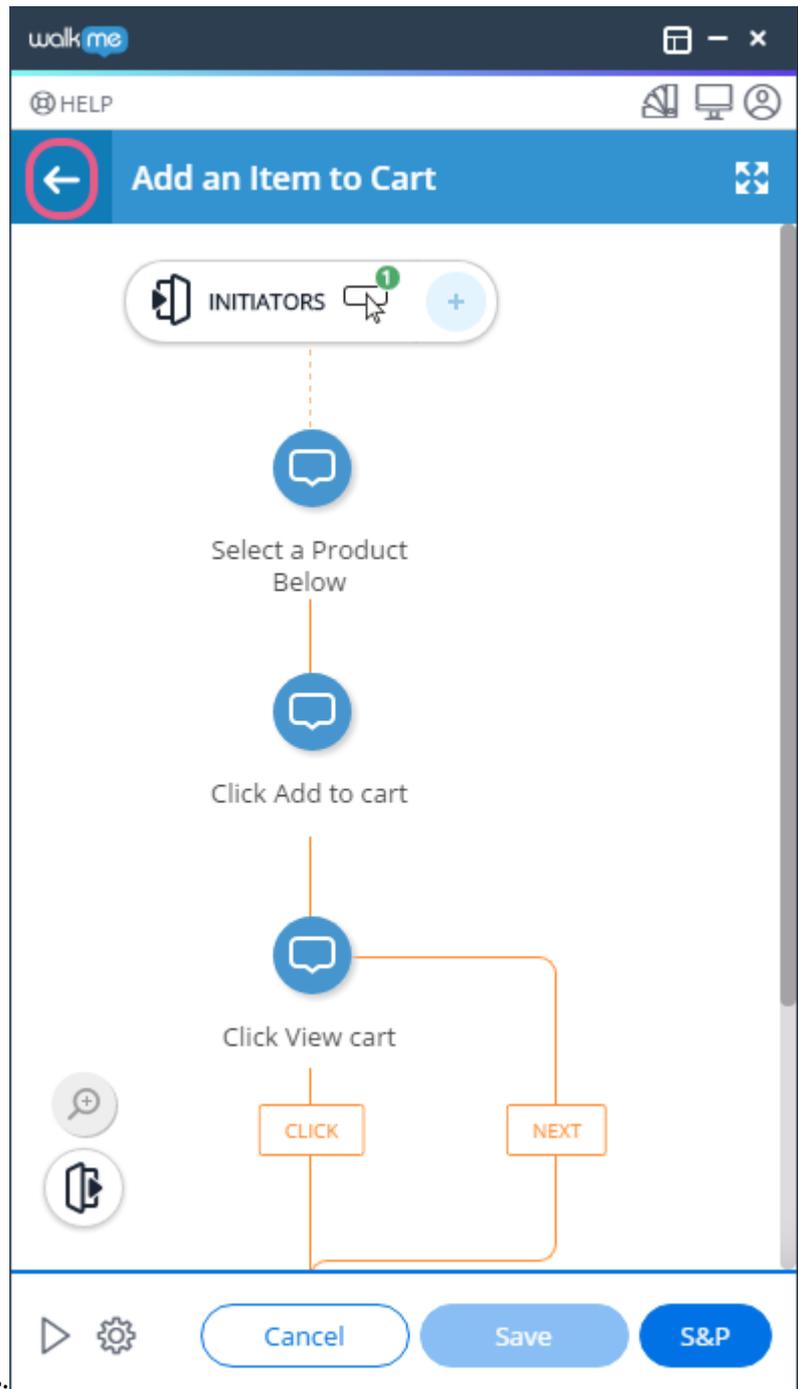
Step 14: Go through each Conversation step and alter the text to your liking

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

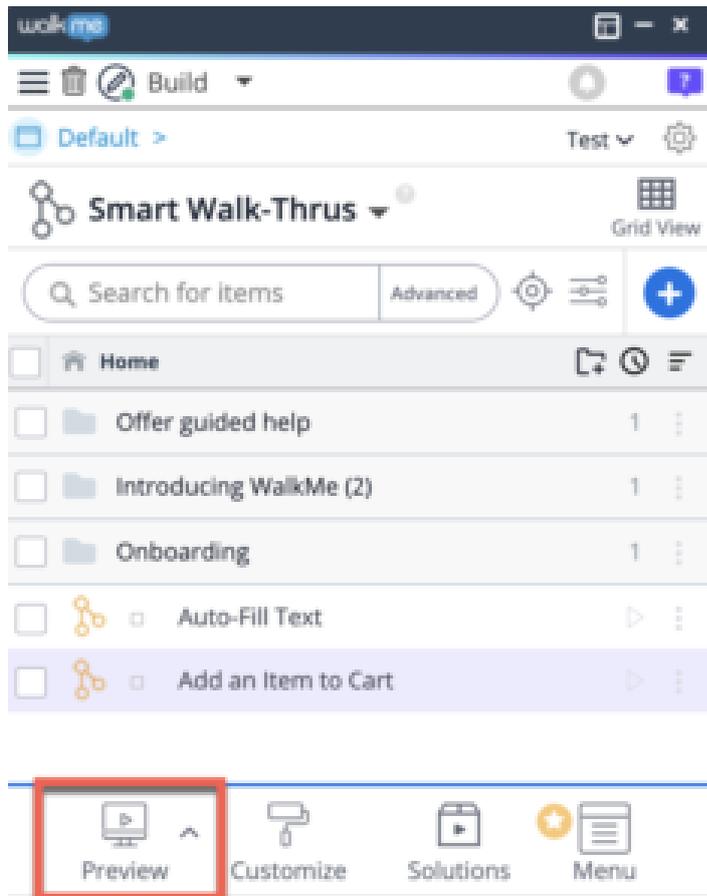
- Click *BACK TO SMART WALK-THRU*:

The screenshot shows the WalkMe ActionBots interface. At the top right, there is a button labeled "BACK TO SMART WALK-THRU" circled in red. The main content area is titled "Update Your Employee Profile" and contains a table of conversation steps. The table has columns for Type, ID, Name, Next step, and Actions. Below the table are buttons for "UNPUBLISH", "PLAY CONVERSATION", and "PUBLISH".

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		



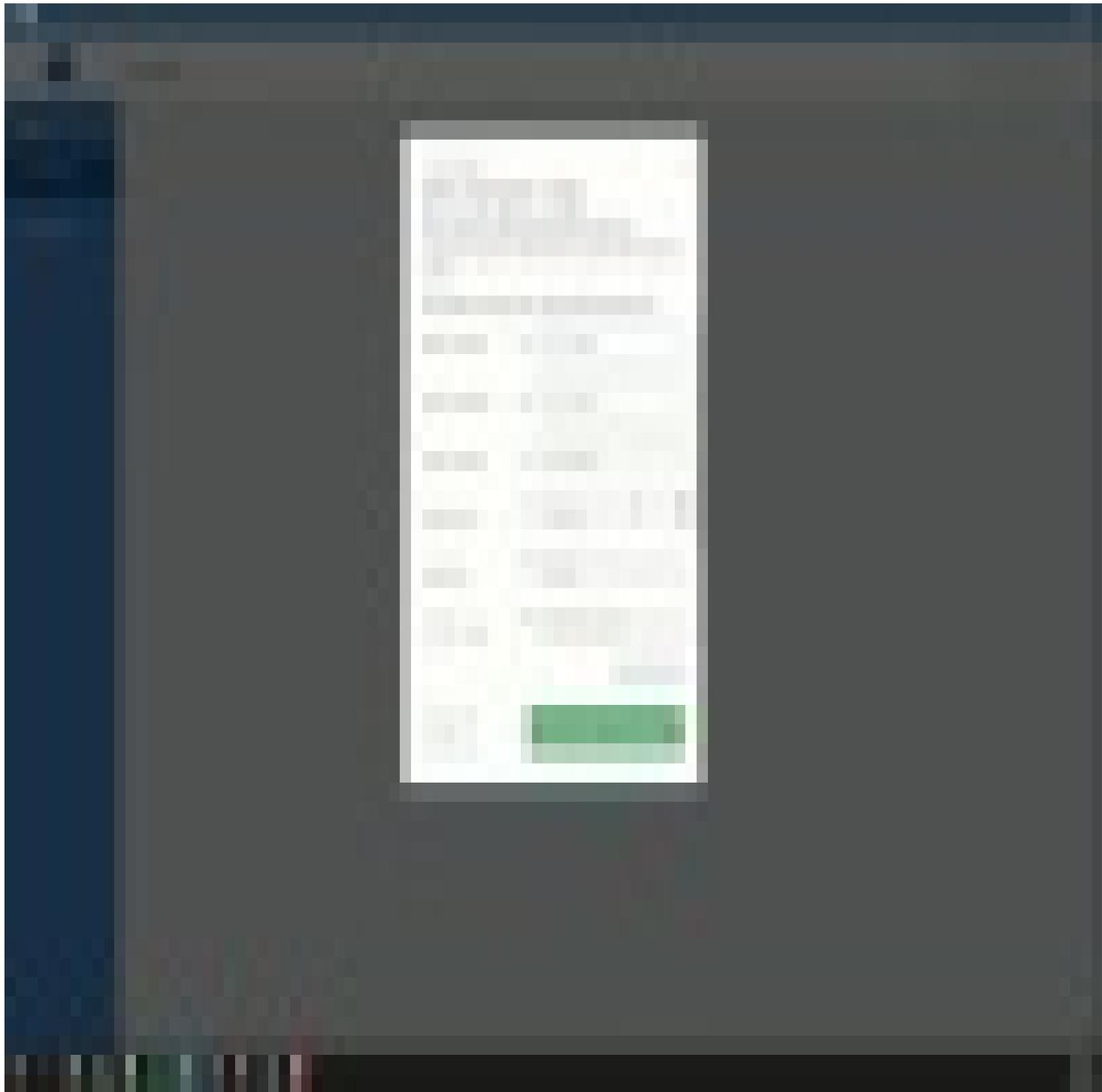
- Click the back arrow on the Editor:
- And click *Preview* in the blue Admin Bar at the bottom of the Editor:



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](#).