

How To Create an ActionBot Conversation

Alternative Method Available

If you only plan to connect a Conversation to a single Smart Walk-Thru, consider building your Conversation from within the Smart Walk-Thru itself, as this method is quicker. [Click here to learn how.](#)

Brief Overview

This article explains how to build a Conversation which can be assigned to one or more ActionBots.

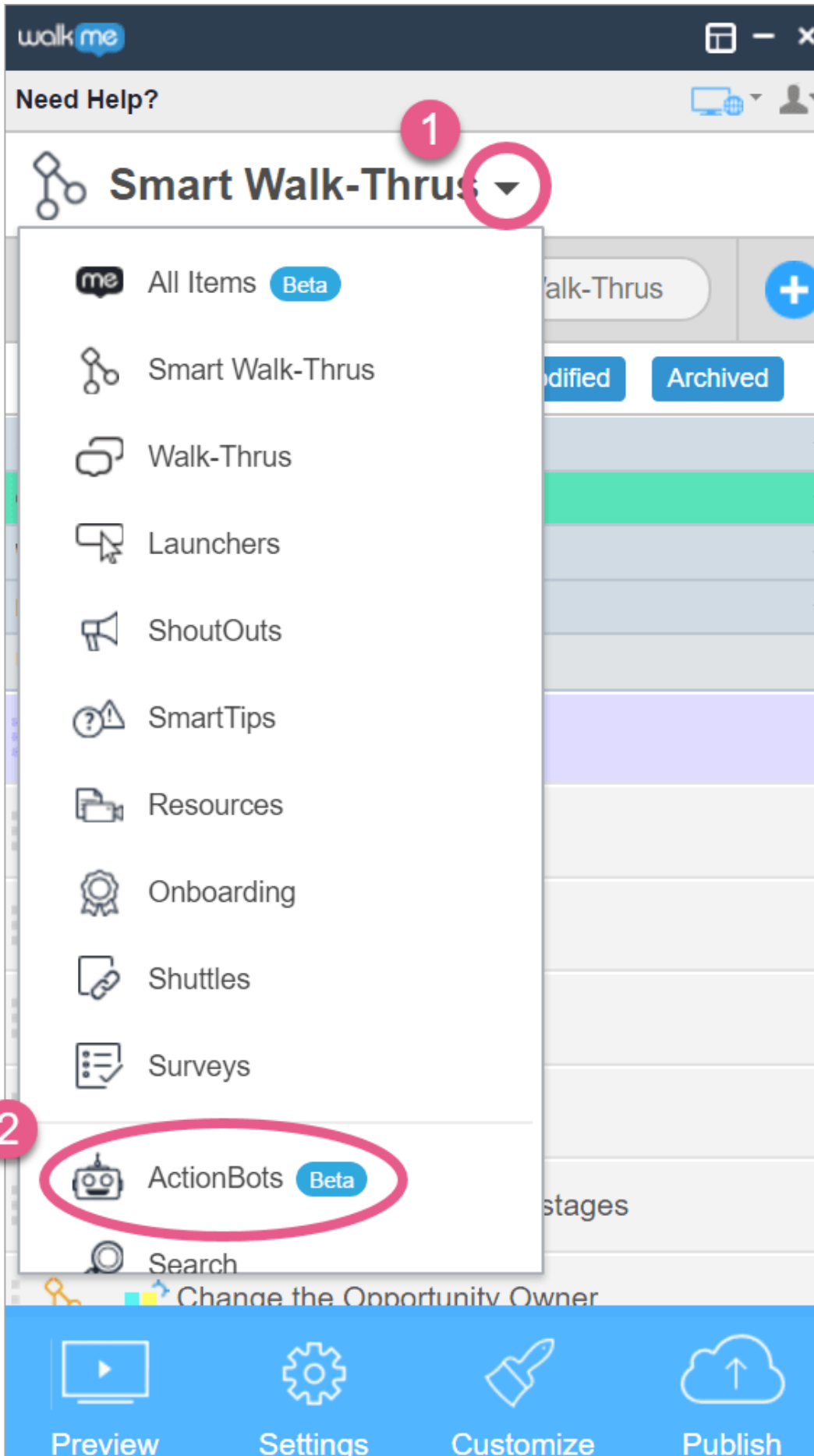
Conversations are built without any coding and allow you to answer the end-user's question and/or collect information that later can be used to automate a process using a Smart Walk-Thru. Conversations can be used to complete common tasks, triage a support topic, navigate the end-user to a section of your application, or even provide a personalized search experience, all by using a simple chat interface.

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

Steps For Building a Conversation

Step 1: Sign into your WalkMe Editor account

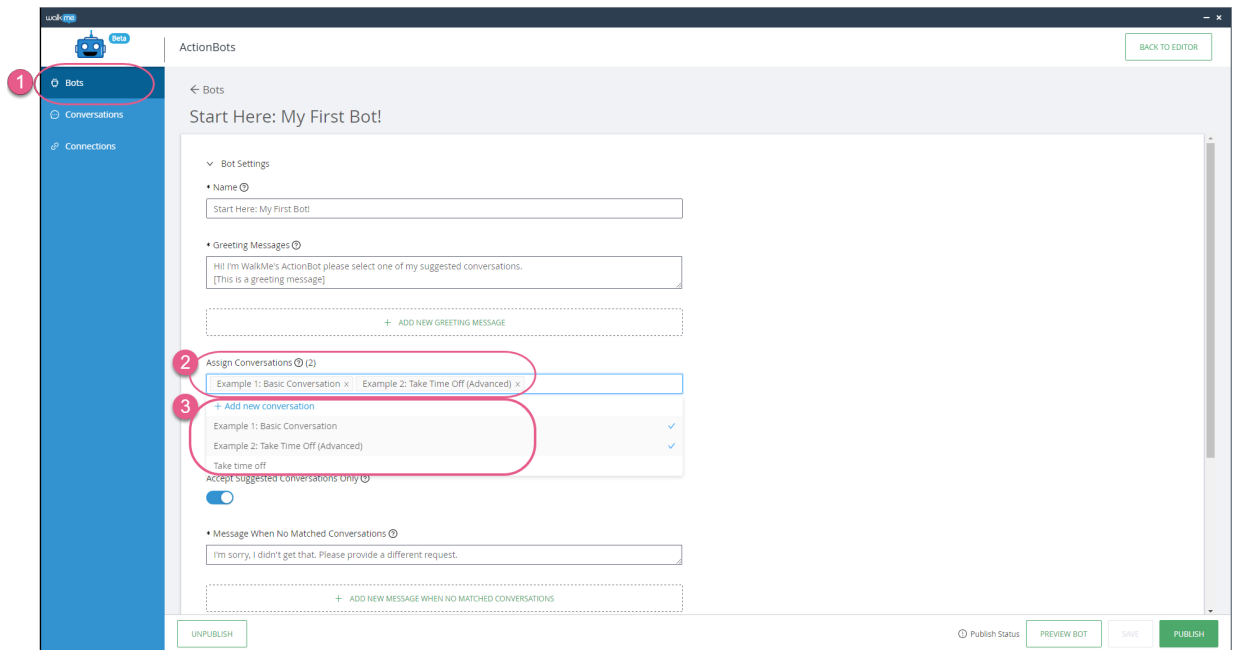
Step 2: Click the WalkMe apps dropdown triangle and select the ActionBots app



Step 3: Add a new Conversation

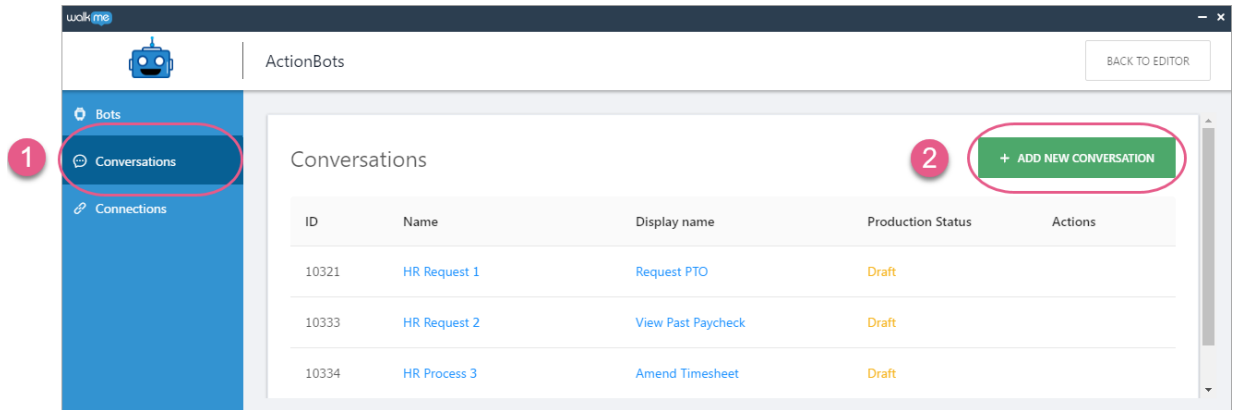
Recommended method, from within an already-existing Bot

- In the Bots tab, select an already-existing Bot;
- Click the Assign Conversations field to open a dropdown menu;
- Click + Add new conversation:



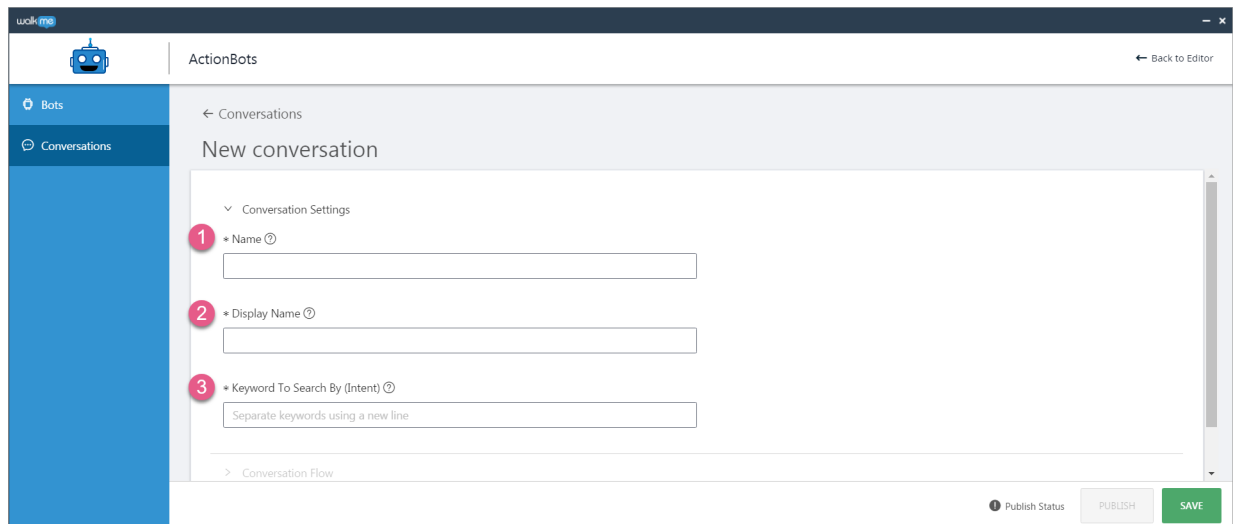
Alternative method, from scratch

- Click on Conversations in the left sidebar;
- Click + ADD NEW CONVERSATION in the upper-right corner:

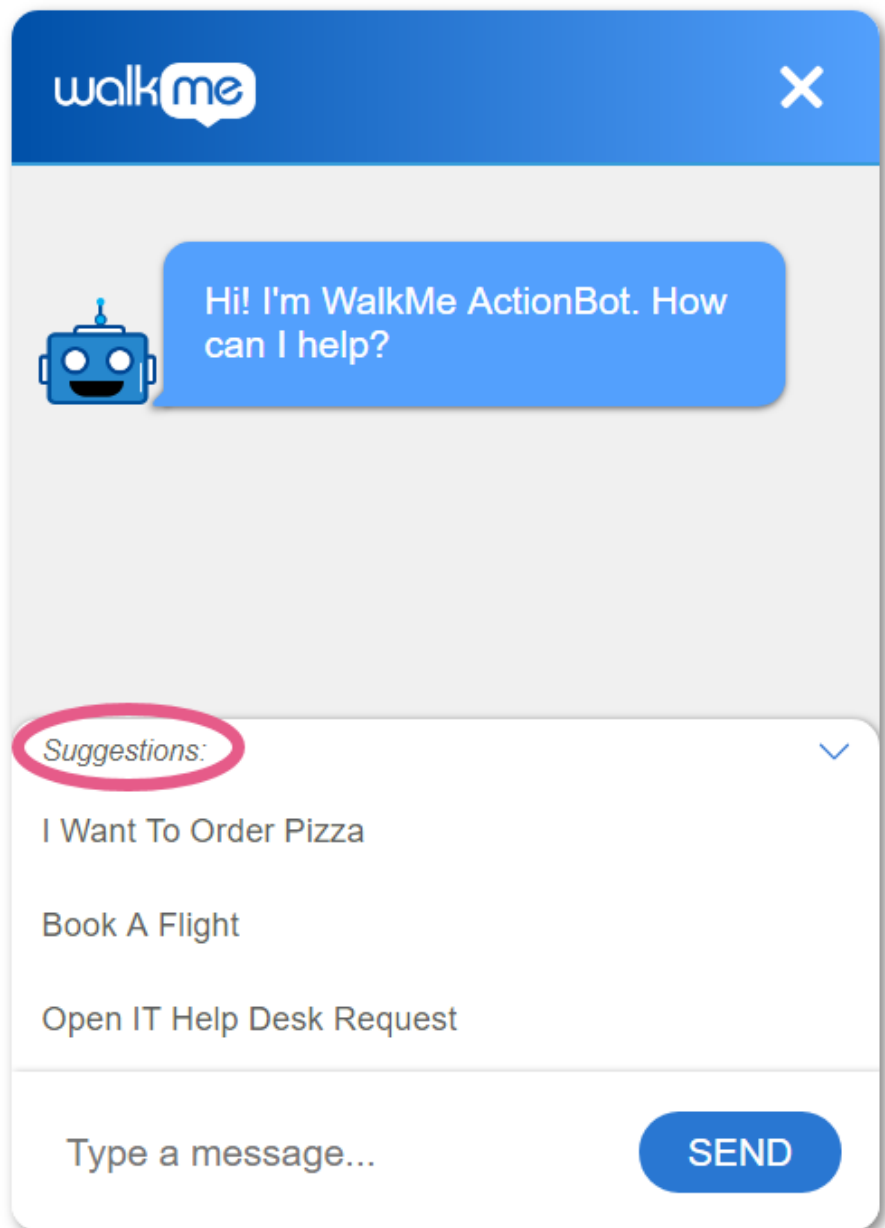


Step 4: Configure the question settings

- On the New conversation page, fill in the following mandatory fields:



- Name:
 - This is the private name (for identification purposes) that only you (and your fellow Conversation-builders) will see. The end-user will not see it.
- Display Name:
 - This is the name your end-user will see if this Conversation is assigned to a Bot and appears in the chat dialogue box under the "Suggestions:" header text:



- Keyword To Search By (Intent):
 - If the end-user types any of these keywords into the chat dialogue box of a Bot containing this Conversation, this Conversation will be triggered;
 - Enter as many keywords as you want. Simply type one, hit Enter, type another, hit Enter, etc.;
 - Pro-Tips:
 - Keywords are not case sensitive;
 - WalkMe recommends using analytics to see what end-users search for and updating your keywords accordingly.

- Click SAVE.

Step 5: Create your Conversation's flow

Create your Conversation flow using one or more of the Conversation building blocks. You must use at least one building block type, but it can be any one. None is mandatory per se.

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MESSAGE

- Messages consist of text you write that a Bot may present to the end-user in the course of the Conversation;
- Common uses of messages include providing end-users with useful links, explanations, and answers to questions.

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QUESTION

- Questions consist of text you write that a Bot may present to the end-user in the form of a question in the course of the Conversation;
- The Bot will await the end user's response to the question before continuing to the next step (which may be dependent on the end user's answer);
- You must select a type for each question. the options include Text, Boolean, Number, Regex, Phone, Date, Choice, and Choice - Salesforce:

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Text Type Questions

- No natural language processing (NLP) is used;
- The ActionBot will log the end user's entire input as the answer to the question and may re-use answers in follow-up questions.

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Date Type Questions

- This question type uses NLP. This means the ActionBot can interpret numerous date responses, e.g., "Tomorrow," "Next week," "1.2," and "1-9-1990";
- You must select your preferred date format (DD/MM/YYYY or MM/DD/YYYY). This will determine the format used for the extracted answer;
- The ActionBot can also extract date-time responses;
- Advanced: You can configure the extracted date to a different format in a Smart Walk-Thru by using specialized values in the Smart Walk-Thru:



Current Format

Requested
Format

Value to Use in
the Smart Walk-
Thru

MM/DD/YYYY
(12/03/2018)