

The Four Elements of ActionBot



[WalkMe's ActionBot](#) allows end-users to perform tasks on different platforms, while naturally conversing with the Bot, for example, requesting time-off via the ActionBot instead of logging in to the HR system.

1. The ActionBot Launcher

The **ActionBot Launcher** is displayed on your site and opens the ActionBot chatbox when clicked.

To create one:

- Once you are inside your selected Bot
- In the Initiators section, select "Default ActionBot Launcher" . The launcher will be named after the Bot.

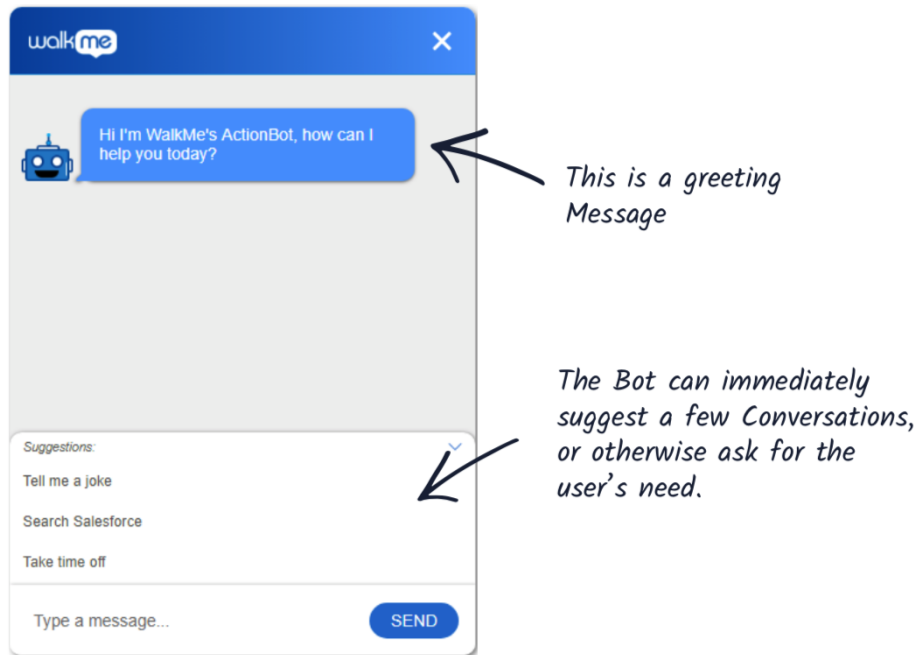
2. A Bot

A specific **Bot** 'holds' different Conversations, and works as a Dispatcher. It recognizes user intent, and assigns the right Conversation. [Read more about creating a Bot.](#)

There can be a Bot for every system you manage!

E.g. A Bot for Salesforce and another one for your external-facing system.

You can customize the Bot's look and feel, buttons, greeting and error messages, etc.

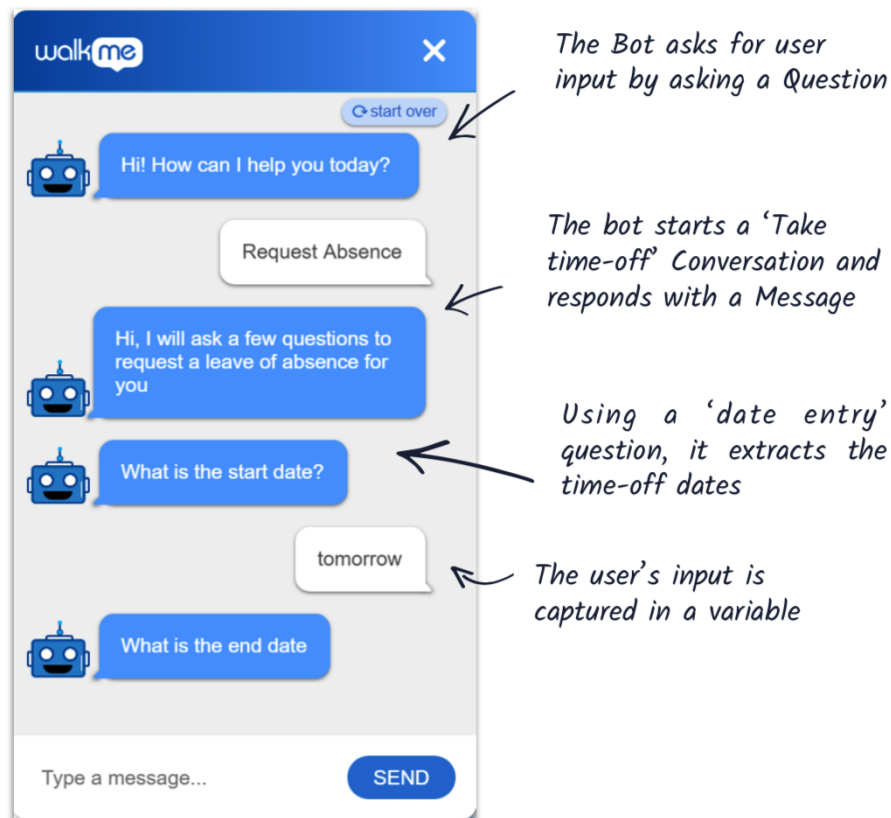


3. A Conversation

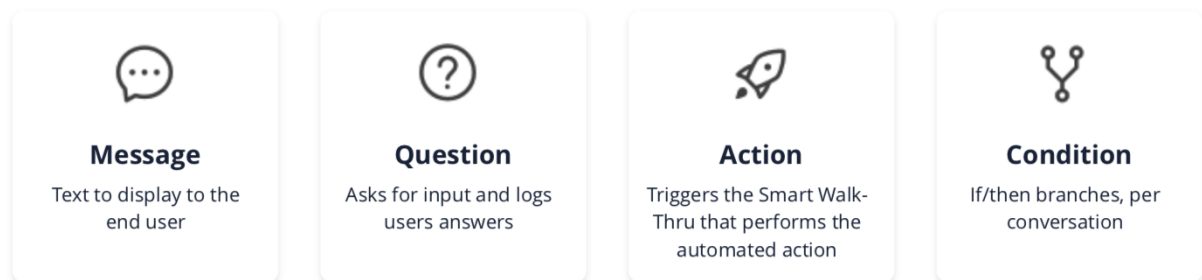
A Conversation is a process that the Bot performs. [Read more about creating a conversation.](#)

For example, a 'Take time-off' Conversation will look like this:

- Ask the user Questions;
- Log users answers as Variables;
- Insert Answers in the HR system automatically, using an Action.



The 4 Conversation elements



4. An Action

A Conversation is aimed to perform or to end with an automated action (e.g. insert the collected dates in the HR system to get time-off or receive an email when end-users complete an NPS survey.)

Actions can include sending Connections, starting a new conversation or initiating any of the following WalkMe item types: Smart Walk-Thrus, Surveys, ShoutOuts, Shuttles, Resources, Live Chat, or Open Menu.

See below sections to learn how to use Smart Walk-Thru and Connection Actions. The rest of the Actions are similar, except for Open Menu, which just requires selecting the Action type.

Smart Walk-Thru

[Read more about Automating Smart Walk-Thrus.](#)

Connect a conversation to a Smart Walk-Thru as follows:

- Create a new Smart Walk-Thru;
- Record the steps using the new Auto-Step feature;
- When using the 'Fill text' option, follow this format: `${ValueFromTheQuestion}`;
- Go to the Conversation > Action and assign the above SWT and match the variable.

Action settings

* Action Name 

insert time-off request

* Action Type

WalkMe Smart Walk-Thru

Smart Walk-Thru 

Request time-off SWT (554721)

Data The Smart Walk-Thru Requires 

Enter Start Date

Name As

`${StartDate}`



+ ADD FIELD

* Delay 

1000

Milliseconds

SAVE ACTION TO THE CONVERSATION

Connection

A connection is the ability to trigger an external API as an action of a Bot's conversation.

The conversation can collect all of the information required by the API, then trigger it and perform the action on behalf of the user.

NOTE:

The Connection Destination must be created already

Connect a conversation to a Connection destination as follows:

- Select action type walkme Connection from dropdowns
- Select existing destination
- Important to make sure that all necessary properties have been added (the NameAs property should be automatically filled, make sure it is the same as your destination platform).
- Click the button 'SAVE ACTION TO THE CONVERSATION'

Action Type

Call Connection ? ▼

Select Call Connection Destination ?

testGet (419) ▼

TEST

Stop Conversation on a failure ?

☐

Data the WalkMe Connection Call Sends ?

[raw](#) ?

UserInputA ▼ Name as inputDataA 🗑️

+ ADD FIELD

Response Data Mapping ?

Name ?	Type ?	Path ?	Default value ?	Error value ?	
OutputDataA	Boolean ▼	message.results[0].A	false ▼	false ▼	🗑️

+ ADD FIELD