

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.

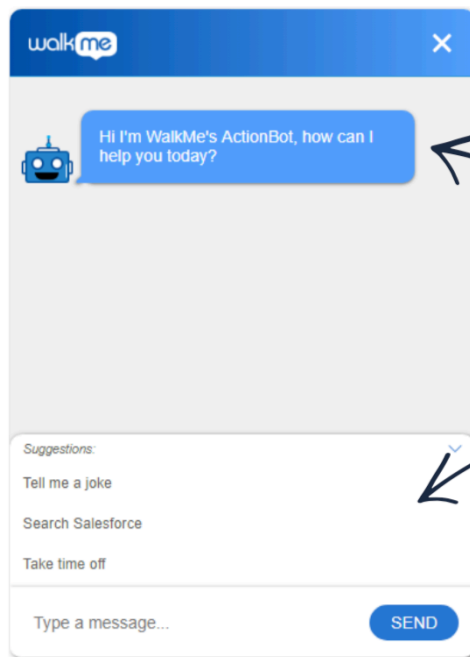
2. A Bot

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.



This is a greeting Message

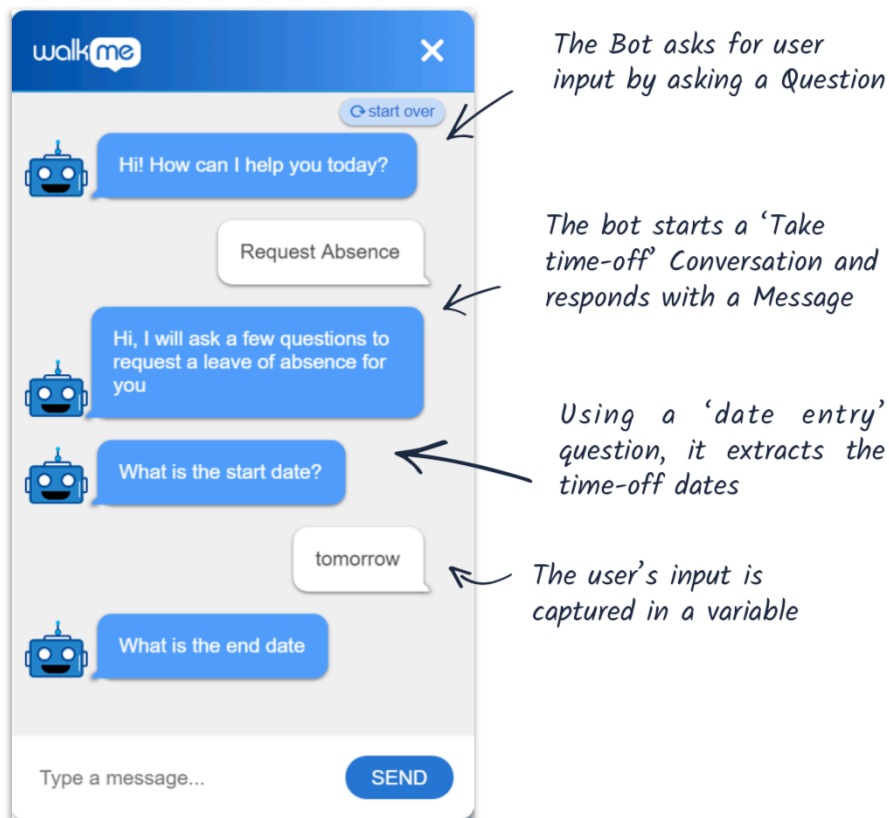
The Bot can immediately suggest a few Conversations, or otherwise ask for the user's need.

3. A Conversation

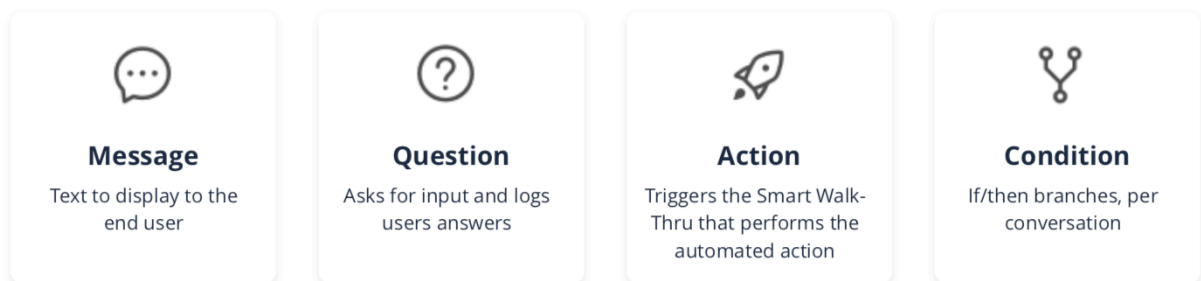
A Conversation is a process that the Bot performs. [Read more about creating a conversation.](#)

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

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

variable.

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