

WalkMe Builder Assistant: Getting Started Guide

Brief Overview

WalkMe Builder Assistant helps you to submit a ticket directly from the editor with just a couple of clicks and have it quickly resolved by the Builder Assistant team. It also provides you with personalized recommendations on how to improve your content.

Supported item types

Builder Assistant is currently available for:

- Launchers
- SmartTips
- Smart Walk-Thru steps:
 - Builder Assistant can be used to report any steps for which you capture an on-screen element. Currently, elements which are not linked to an on-screen element are not supported.
 - Supported steps: Step, Auto Step
 - Unsupported steps: Triggers, Popup, Split Action, Wait for

For unsupported items, you can use [the Issue Recorder](#).

Get to Know Builder Assistant Tickets

How does it work?

1. **In the editor**, open the item you're experiencing issues with on the relevant system
2. Click the **Assist Me** button in the upper right corner

Save&New

Launcher Options

Assist Me

Interaction

Display condition

Appearance

Selected Element

Notes

Interaction

Name:

Save&New

Tooltip:

Launcher:

Change Launcher

Preview:

Walk Me Through

Action:

None

Display Style:

☒ Always
 ☐ On Hover

Edit on Page

View Launcher

Re-select element

Cancel

Save

3. Select **the issue** you're experiencing

Assist Me

Report issue to WalkMe

Choose one of the issues below:

Launcher shouldn't be on the page

Launcher is missing from the page

Next: Select the element the item is currently connected to

Select element

Review and submit report

Launcher is missing from the page

Launcher name

New Request

Comments (Optional)

Default Text

Re-Select

Cancel

Submit

- **Option 1: Item shouldn't be on the page**

There is a WalkMe item on the page I am on, and it shouldn't be here. If the item was built on Salesforce Lightning, then Builder Assistant may be able to solve the problem with [Context](#).

- **Option 2: Item is missing from the page** I'm on a page where an item should be, but it's not being displayed.

- **Option 3: Item isn't where it should be on the page** I'm on the correct page, but the item is displaying in a different location on the page than I intend for it to be.

- **Option 4: Something else** None of the other options match my issue

4. Select the **element** based on your issue

Issue	Element
1. Item shouldn't be on the page	Select the element that the item is connected to but shouldn't be.
2. Item is missing from the page	Select the element the item should be connected to.
3. Item isn't where it should be on the page	Select the element the item should be connected to.
4. Something else	Select the element that the item is connected to.

5. **Submit** the ticket

- For options 1-3, review and submit the ticket. You'll be able to track its progress in the Console, accessible at console.walkme.com/assistant

Review and submit report

×

Item shouldn't be on the page

Launcher name

WalkMe Through

Comments (Optional)

Re-select ↶

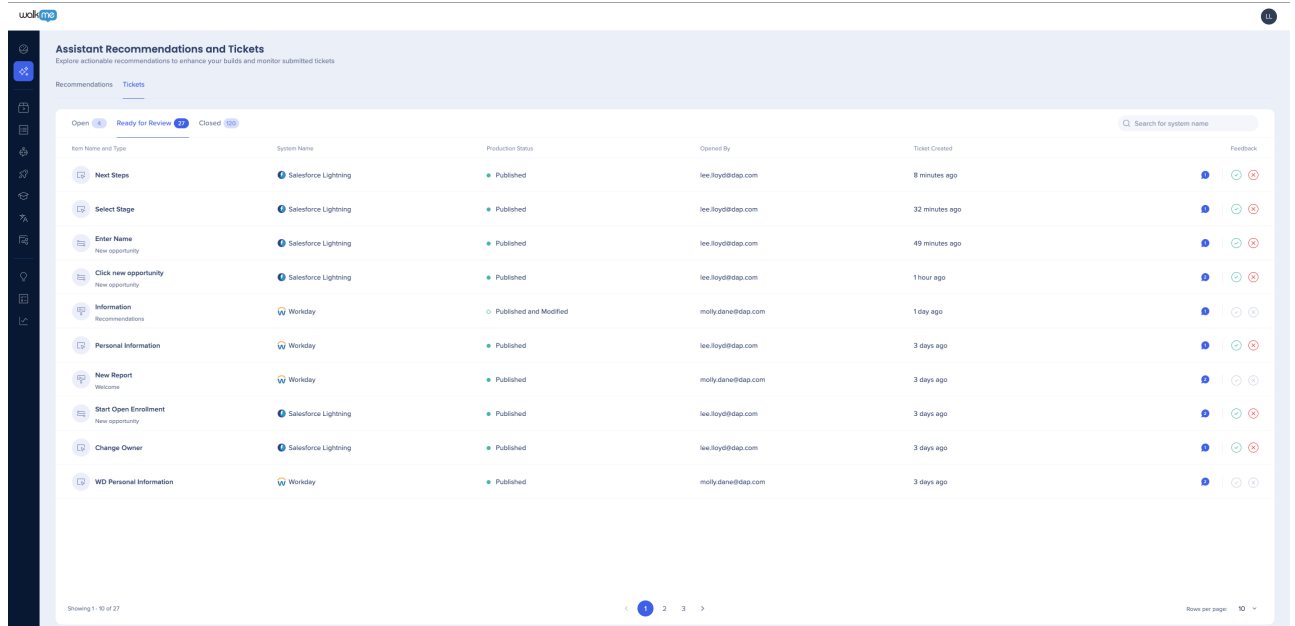
Cancel

Submit

- For option 4 (Something else), you'll be prompted to fill in additional information and a support case will be opened on your behalf. You'll be able to track the ticket progress in

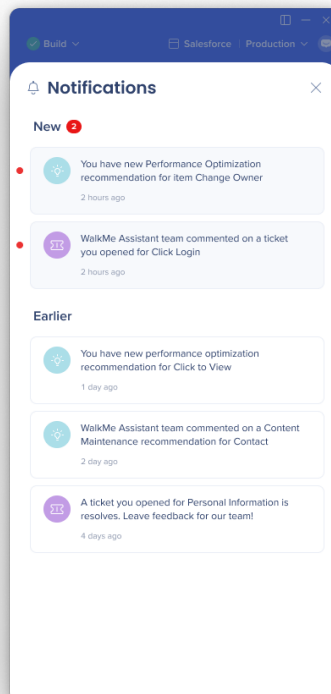
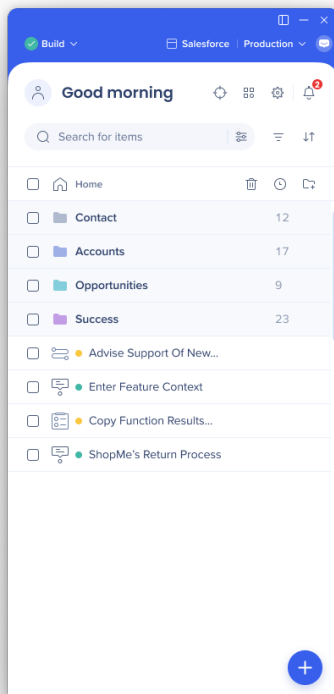
the Support Portal in the Community.

6. Go to **Assistant** → **Tickets** to see a dedicated table with all your tickets and their statuses



Item Name and Type	System Name	Production Status	Opened By	Ticket Created	Feedback
Next Steps	Salesforce Lightning	Published	lee.loyd@dap.com	8 minutes ago	👍 🗑️
Select Stage	Salesforce Lightning	Published	lee.loyd@dap.com	32 minutes ago	👍 🗑️
Enter Name	Salesforce Lightning	Published	lee.loyd@dap.com	49 minutes ago	👍 🗑️
Click new opportunity	Salesforce Lightning	Published	lee.loyd@dap.com	1 hour ago	👍 🗑️
Information	Workday	Published and Modified	molly.dane@dap.com	1 day ago	👍 🗑️
Personal Information	Workday	Published	lee.loyd@dap.com	3 days ago	👍 🗑️
New Report	Workday	Published	molly.dane@dap.com	3 days ago	👍 🗑️
Start Open Enrollment	Salesforce Lightning	Published	lee.loyd@dap.com	3 days ago	👍 🗑️
Change Owner	Salesforce Lightning	Published	lee.loyd@dap.com	3 days ago	👍 🗑️
WD Personal Information	Workday	Published	molly.dane@dap.com	3 days ago	👍 🗑️

7. You will receive **notifications in the editor** when a ticket status changes or you have a new message or recommendation from the Builder Assistant team



[WalkMe Assistant: Tickets](#)

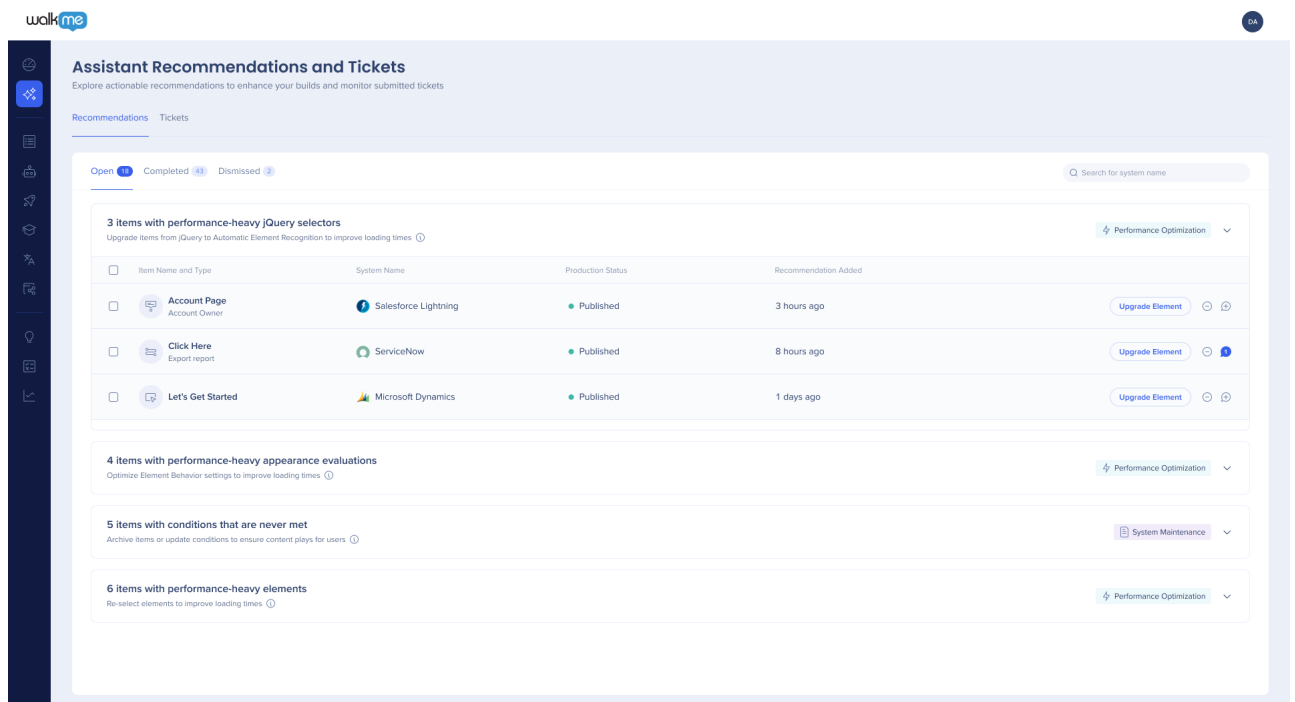
Get to Know Builder Assistant Recommendations

How does it work?

No action needed!

There is no requirement to submit tickets or do anything else for recommendations to be generated.

1. Open **the Builder Assistant** in Console
2. In the **Open tab**, you'll see all the current and most up-to-date recommendations from the Builder Assistant team



3. Click on the CTA **to apply the recommendation**
 - Some recommendation types (for example, the ones that require upgrading an element) are applied automatically with one click – no need to go to the editor
 - Other types (for example, when the element can't be found) might take you to the editor for reviewing the item and its conditions

Tip

Use bulk action to apply a few similar recommendations at once

3 items with performance-heavy jQuery selectors				Performance Optimization
Upgrade items from jQuery to Smart Element Recognition to improve loading times ⓘ				
Item Name and Type	System Name	Production Status	Recommendation Added	
<input checked="" type="checkbox"/> Account Page Account Owner	Salesforce Lightning	Published	3 hours ago	Upgrade Element ⓘ ⓘ
<input checked="" type="checkbox"/> Open Request	ServiceNow	Published	4 hours ago	Upgrade Element ⓘ ⓘ
<input type="checkbox"/> Check out Chatter				Upgrade Element ⓘ ⓘ

2 Recommendations selected Upgrade Element ×

4. Publish the changes directly from here

5 items with performance-heavy jQuery selectors				Performance Optimization
Upgrade items from jQuery to Smart Element Recognition to improve loading times ⓘ				
Item Name and Type	System Name	Production Status	Recommendation Added	
<input checked="" type="checkbox"/> Onboarding Launcher	Salesforce Lightning	Published	3 hours ago	Publish ⓘ ⓘ
<input checked="" type="checkbox"/> Open Resource	ServiceNow	Published	3 hours ago	Publish ⓘ ⓘ
<input type="checkbox"/> Open Request	Microsoft Dynamics	Published	4 hours ago	Upgrade Element ⓘ ⓘ
<input type="checkbox"/> Account Page Account Owner	Oracle	Published	4 hours ago	Upgrade Element ⓘ ⓘ
<input type="checkbox"/> Check out Chatter				Upgrade Element ⓘ ⓘ

2 Recommendations selected Publish ×

[WalkMe Assistant: Recommendations](#)