

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

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.

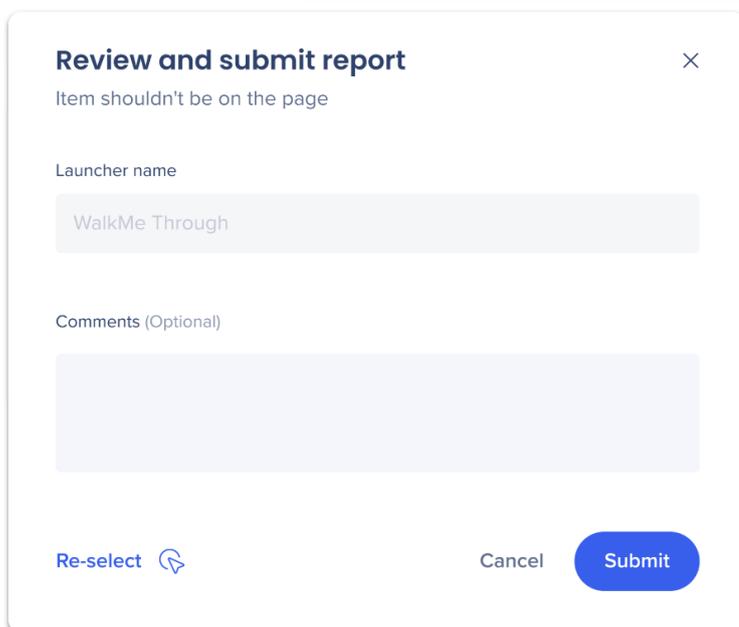
- **Option 4: Something else** None of the other options match my issue

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



- 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

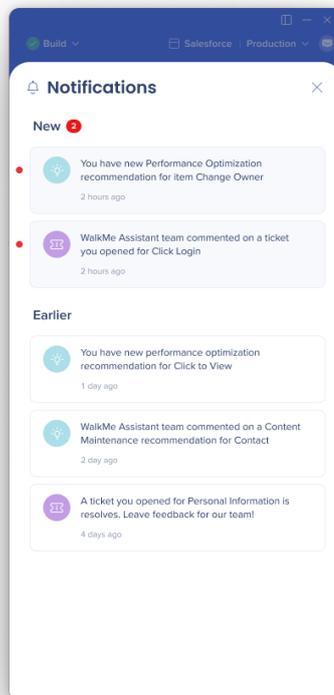
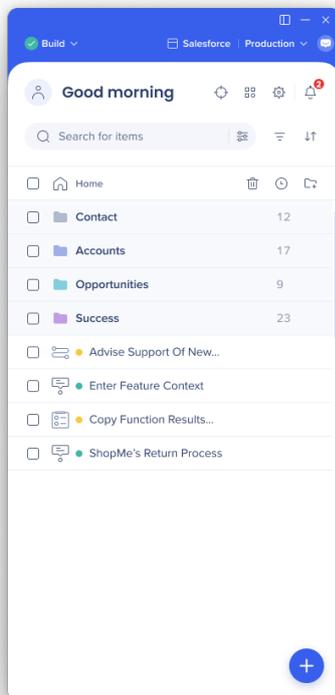
the Support Portal in the Community.

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

The screenshot shows the 'Assistant Recommendations and Tickets' interface. It features a table with the following columns: Item Name and Type, System Name, Production Status, Opened By, Ticket Created, and Feedback. The table contains 12 rows of data, including items like 'Next Steps', 'Select Stage', 'Enter Name', 'Click new opportunity', 'Information Recommendations', 'Personal Information', 'New Report', 'Start Open Enrollment', 'Change Owner', and 'WD Personal Information'. The 'Production Status' column shows 'Published' or 'Published and Modified'. The 'Ticket Created' column shows various time intervals like '8 minutes ago', '32 minutes ago', '49 minutes ago', '1 hour ago', '1 day ago', and '3 days ago'.

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

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](#)

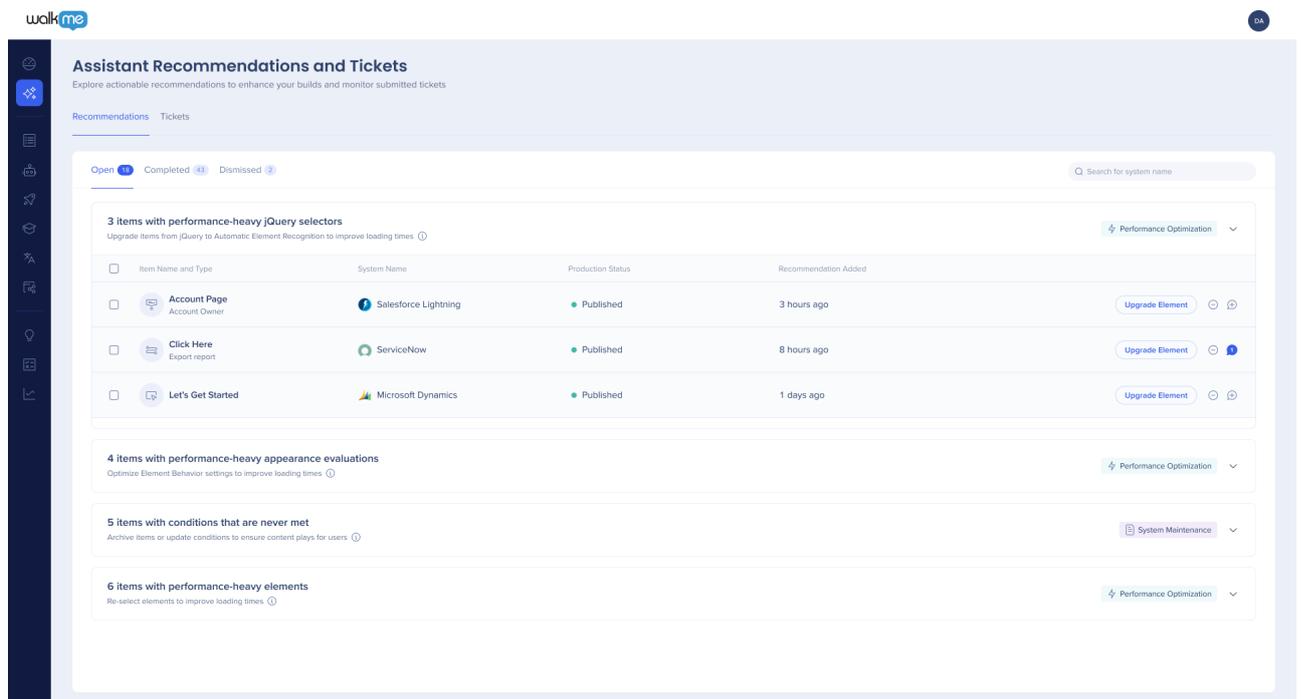
Get to Know Builder Assistant Recommendations

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



The screenshot displays the 'Assistant Recommendations and Tickets' interface. It features a sidebar with navigation icons and a main content area. The main area is titled 'Assistant Recommendations and Tickets' and includes a search bar. Below the search bar, there are tabs for 'Recommendations' and 'Tickets'. The 'Recommendations' tab is active, showing a list of recommendations. The list is organized into sections with titles and descriptions. Each section contains a table of items with columns for 'Item Name and Type', 'System Name', 'Production Status', and 'Recommendation Added'. Action buttons like 'Upgrade Element' and 'Performance Optimization' are present for each item.

Item Name and Type	System Name	Production Status	Recommendation Added
Account Page Account Owner	Salesforce Lightning	Published	3 hours ago
Click Here Export report	ServiceNow	Published	8 hours ago
Let's Get Started	Microsoft Dynamics	Published	1 days ago

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

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

4. Publish the changes directly from here

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

[WalkMe Assistant: Recommendations](#)