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

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

- **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**
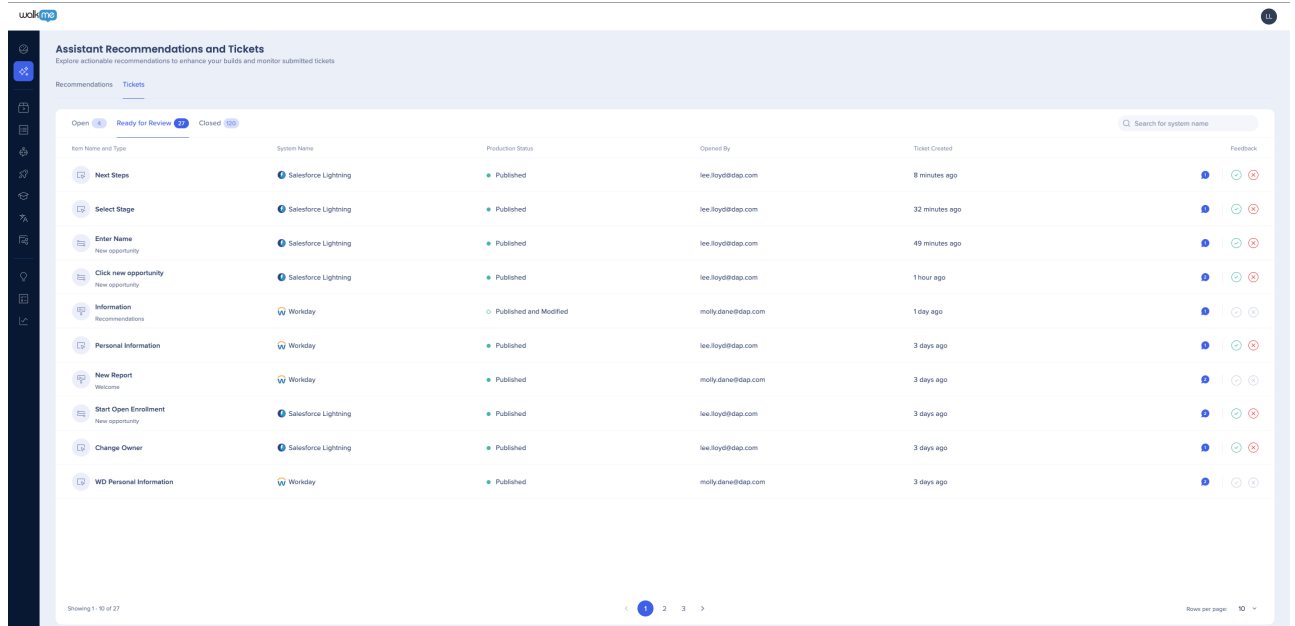

   - For option 4 (Something else), you'll be prompted to fill in additional information and a support case will be opened on your behalf. You'll be able to track the ticket progress in
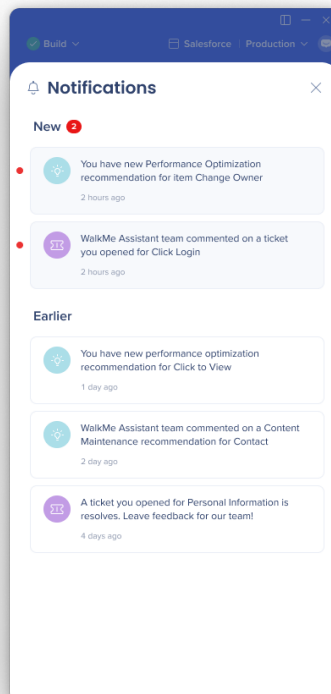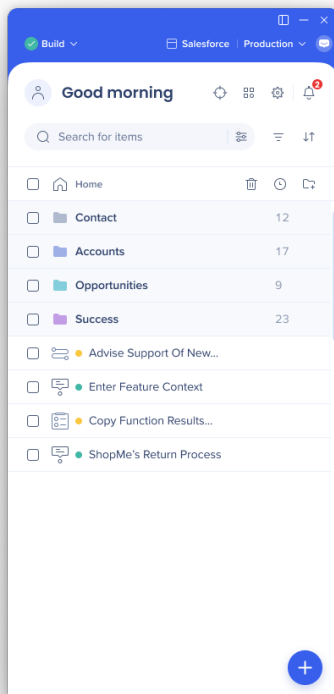
the Support Portal in the Community.

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

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
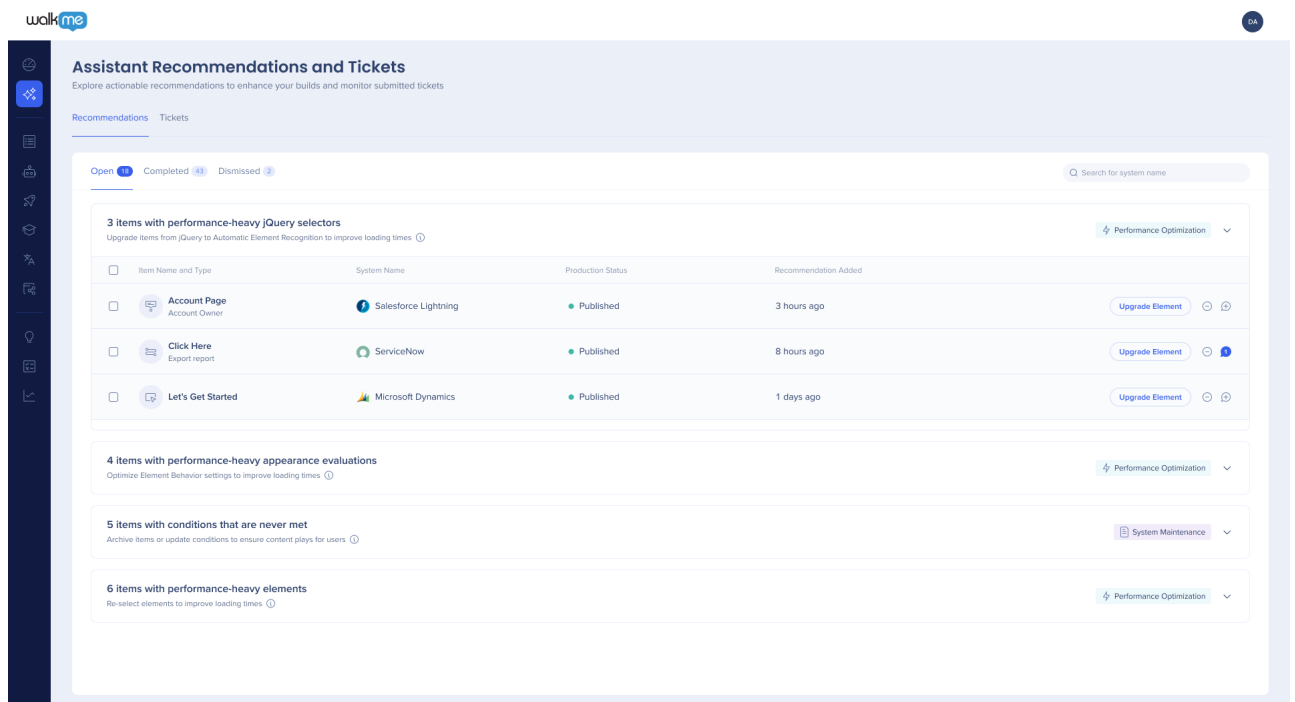
Get to Know Builder Assistant Recommendations

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

4. **Publish the changes** directly from here

[WalkMe Assistant: Recommendations](#)