What Is the WalkMe ActionBot?

Brief Overview

WalkMe ActionBot understands what users want to do and automates tasks for them. The ActionBot is API-free and uses a natural language chat interface making digital adoption as simple as holding a conversation. The ActionBot enhances the customer and employee experience by eliminating confusion, errors, and frustration while helping users complete tasks.

By using ActionBot's intuitive chat-interface, users will be able to complete tasks without any training, even as they move across different software tools. With the ActionBot, employees no longer need to navigate sophisticated enterprise management systems, fill in complex forms, or struggle through difficult processes.

The ActionBot is built using the WalkMe Editor, requiring no R&D effort, and it can be placed on any web application where users engage in day-to-day activities. Because the ActionBot completes tasks using the UI of your software, there are no APIs required for successful implementation. Any process a user can complete may be automated by the ActionBot.

Use Cases

WalkMe ActionBot use cases include the following:

- **Reduce Support Tickets** by answering FAQs, automating common requests, and offering self-serve resources;
- **Streamline HR processes** like requesting time off, reporting missing days, answering common tax and payroll questions, performing exit interviews, and accessing, adjusting, or presenting benefit details;
- **Increase efficiency and reduce errors** in your CRM when creating and editing leads, opportunities or creating project tasks.

What Makes the WalkMe ActionBot Tick?

Digital Adoption Institute

- View the ***ActionBot* course** in the DAI
- Don't have a DAI account yet? <u>Sign up here</u>

**Here are the core building blocks of the WalkMe ActionBot:**

- **Bots:** A Bot is a chat interface that engages users in conversations that you create for it. Bots can trigger actions and automate tasks based on a conversation with a user, and multiple conversations can be added to a single Bot. Keywords may be added to identify the intent of the users and select the appropriate conversation. Bots are triggered by Launchers, so they can be placed anywhere in your website. [Read more about building ActionBots here](#).

An example of a *Bot action* is triggering a Smart Walk-Thru and inserting user-provided answers from a conversation into text fields on your website, as opposed to requiring the user to do so.

- **Conversations:** A conversation is a set of messages, questions, conditions, and actions. Once a Bot has deciphered the end-user's intent, it converses with the end-user until either the conversation is completed or it determines that it should perform an action. [Read more about building conversations here](#).
    - Different Bots can hold different conversations as well as hold the same conversations as one another.
        - For example, a Bot placed in Gmail could contain conversations related to Salesforce, HR systems, and expense reports, while a Bot that is placed in Salesforce could contain conversations related solely to Salesforce.
- **The ActionBot Editor:** In the ActionBot Editor, you can create and define Bots and conversations:
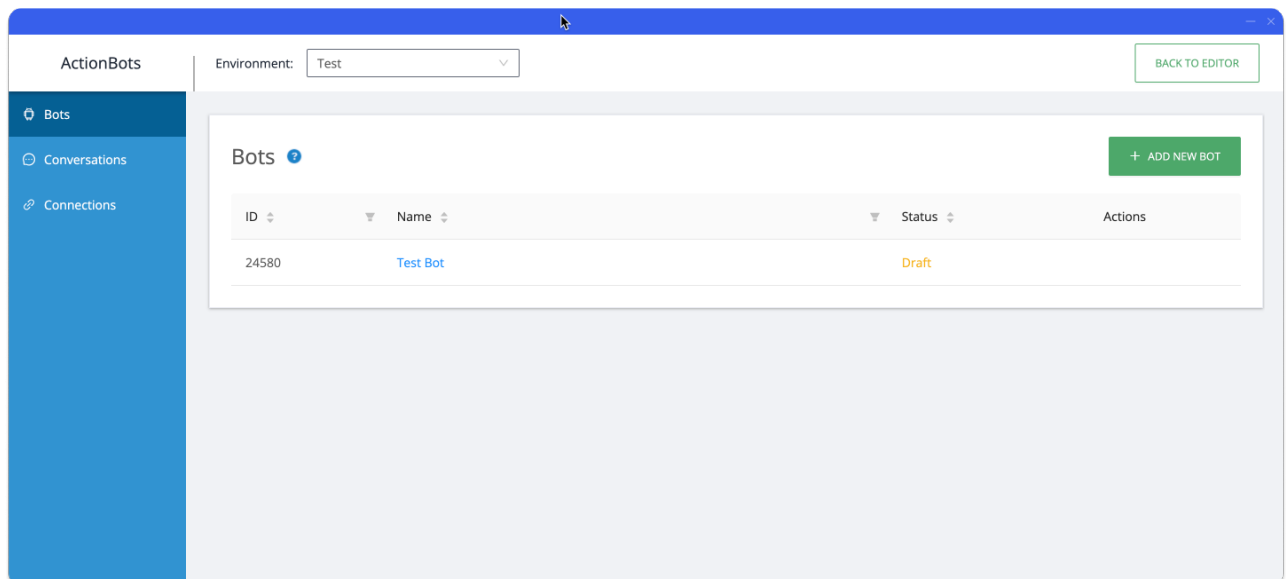
- **The chat dialog box:** The dialog box is the user's point of interaction with a Bot. From here, a Bot can engage users in conversations and perform actions for users when appropriate:
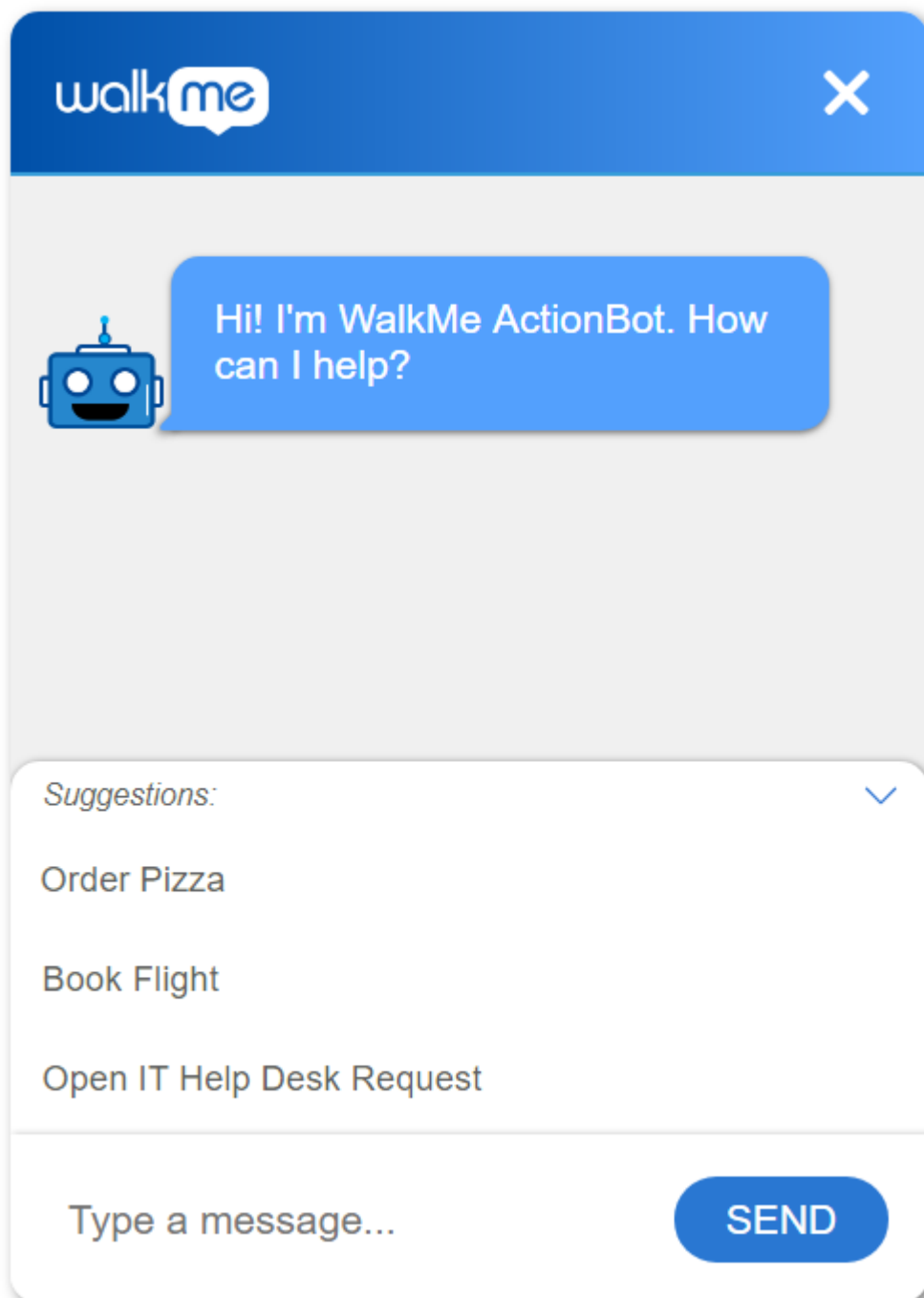
**The WalkMe items that interact with the WalkMe ActionBot include (but are not limited to) the following:**

Initiators: Bots are triggered by Initiators, which are Launchers and permalinks. Simply create or designate a Launcher and select it as the trigger in the ActionBot Editor's *Bot* section;

Make sure to assign *Action = Open ActionBot* to the Launcher, select your desired Bot, and, if

appropriate, select your desired Conversation (OPTIONAL) in order to assign it to the ActionBot. If selecting a Conversation, check the *Start a conversation* checkbox and select a Conversation from the Conversation dropdown menu:

Selected WalkMe Items: You can configure specific WalkMe items (of type Smart Walk-Thrus, Surveys, ShoutOuts, Shuttles, Resources, Live Chat, Open Menu or Connections) to be triggered during Conversations.

Create these action triggers in the ActionBot Editor's *Conversations* section, under *Conversation Flow*:
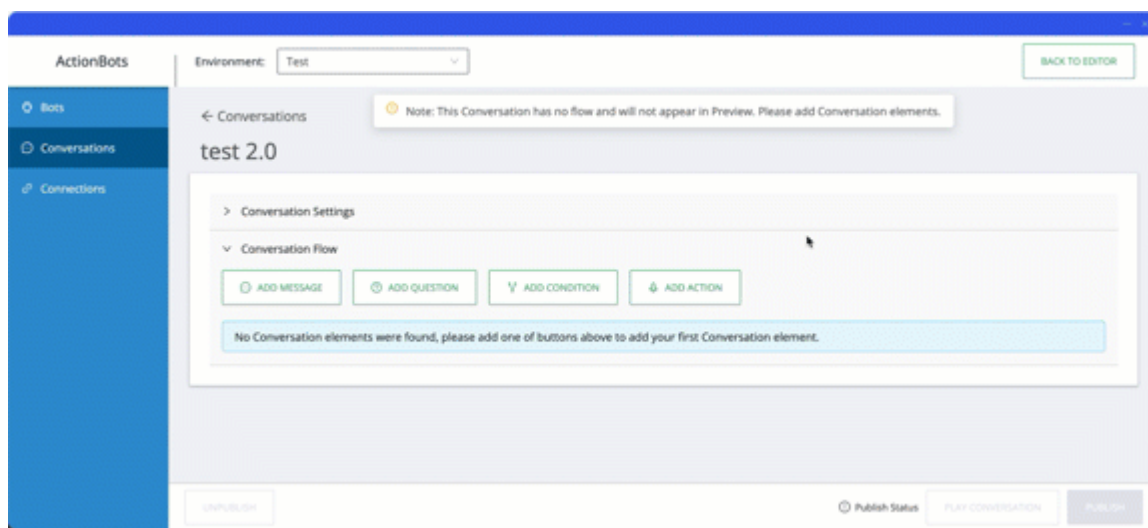
How To Build a Bot

Visit our ***[How To Build an ActionBot](#) article*** to learn how!

Supported Operating Systems and Browsers

- The WalkMe ActionBot can operate on [any browser where WalkMe Web can operate](#), except that it only supports Internet Explorer version 11 and higher
- The WalkMe ActionBot supports all operating systems
- The WalkMe ActionBot is supported in [WalkMe Mobile Web](#)

Technical Notes

- Each user answer is limited to 7000 characters

- Conversations with more than 80 steps are not supported

- It is not recommended to use loop flow in conversations. Loop flow refers to when users link steps in a way that creates a loop
- [Multi-language](#) is supported

    - This means that ActionBot can be translated into different languages. When the bot is used, it detects the user's language and if a translation was created by the builder, the conversation will be in that language