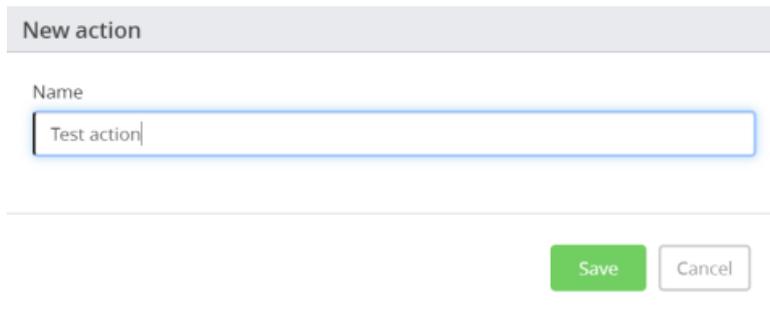# Creating and grouping actions

Actions are the activities performed by an agent while in a dialogue with the visitor. In co-browsing mode, you can send links,videos,images or documents such as pdf files.

Creating an action

To create an action,

1. Go to Configure -> Actions -> click on [+ New action] icon.

2. Enter a name for the action in the '**New action**" window and click **Save**. This will take you to the Edit action screen.
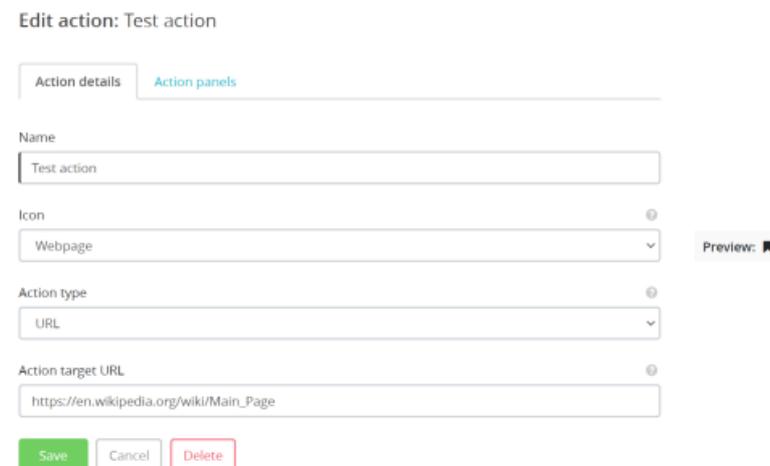
New action

Name

Test action

[Save] [Cancel]

3. In the **Action details** tab, select a suitable icon and **Action type** from the drop-down. Enter the target URL for the webpage,video,image or document.

Edit action: Test action

| Action details | Action panels |

Name

Test action

Icon

Webpage

Preview: ⚑

Action type

URL

Action target URL

https://en.wikipedia.org/wiki/Main_Page

[Save] [Cancel] [Delete]

4. Click **Save** before you proceed to the **Action panels** tab**.**

5. You can add the Action you just created to the list of Action panels available by clicking on the Action panel to select it. It will now appear on the right container to indicate that the action is now associated with the selected Action Panel. Click **Save**.

Alternatively, if you want to create a new Action Panel to add the Action into, select the Action panels option from the menu and follow the instructions in the next section.

To delete an Action, search for the action on the search bar and click on it. Press **Delete** and confirm you decision.

Grouping of actions

Action panels acts as a container for a group of related actions so that it is easier for the agents to find them. To create a new Action panel,

1. Go to Configure -> Action panels -> click on the icon.

2. Enter the Action panel name and click Save.

3. Give a description and select action/s that you would like to associate with this Action panel.

4. Click **Save**

To delete an Action panel, click Delete and confirm your decision in the Edit action panel window.

You can also search for an action panel by typing the name in the search bar and clicking on it to see the details.