



Conversation editor

Purpose

Use the Playbook to read and edit one conversation skill from top to bottom. Each expandable step keeps its message and outcomes together, while the optional Expert Map keeps the full node-based editor available for complex routing.

Prerequisites

- A tenant with a skill set on the Blueprints page.
- Open the editor from an Edit flow, Edit Scaffold, or Edit Exit button so the editor knows which skill set contains the skill.
- Platform administrators see the extra AI and NLU controls noted below. Regular members get the standard editor.

Steps

1 Step 1

The screenshot shows the Ringle Blueprints interface. On the left is a sidebar with the Ringle logo and a user profile 'Demo Auto Shop @demo-autoshop'. Below this are sections: 'OVERVIEW' with 'Dashboard' and 'Analytics'; 'CONVERSATIONS & AI' with 'Blueprints' (selected), 'Experiments', 'Intents', 'LLM Prompts', 'Capabilities', and 'Engine Behavior'; 'TEST DRIVE' with 'Text Chat' and 'Voice Demo'; and 'VOICE & MESSAGING' with 'Voice Config', 'Account Settings', and 'User Guide'. At the bottom of the sidebar is a 'Demo Owner' toggle and a 'Log Out' button. The main area is titled 'Blueprints' and has an 'Experiments' button in the top right. It displays a skill set 'autoshop-booking' with 'inbound' and 'v1' tags, and a 'Publish' button. Below this is a 'Capabilities' table:

Capabilities				
Booking	v1	On	9 nodes	all
Transfer	v1	On	1 nodes	all

⚡ Action: On the Blueprints page, find the skill you want to edit. Click its Edit flow button, or use Edit Scaffold for the shared welcome and routing steps.

✅ What you should see: The editor opens with the skill set and skill in the URL. The full-width editor replaces the normal content area. Playbook is selected unless this browser remembers a different surface.

2 Step 2

Screenshot not available (the Playbook surface has not reached the production portal used for guide captures)

⚡ **Action:** Look over the Playbook before opening a step. Use the Channel and Language controls to choose the customer experience you want to review. On a wide screen, use the Conversation skills rail to move between skills. On a narrower screen, click Skills to open the same list in a drawer.

✓ **What you should see:** The playbook is centered in the available space and reads from top to bottom. Numbered cards show the reachable steps in conversation order. A More steps below cue appears while more content is available, and End of playbook confirms the bottom. Any step that cannot be reached from the start stays visible under Unconnected steps with repair guidance.

3 Step 3

Screenshot not available (the Playbook surface has not reached the production portal used for guide captures)

⚡ **Action:** Open a step card. Review its Name, Purpose, What Ringle says, and What happens next sections. Change the message or an outcome only if you intend to update the draft. Turn on Customize for this channel when the selected channel needs different wording.

✓ **What you should see:** The card expands in place. The message follows the Channel and Language choices at the top of the page. Without a channel override, the editor says it is using the default language message. Outcomes describe what the customer does and where the conversation goes next. Conditions and channel rules, plus the full type-specific controls, stay collapsed until you open them. Draft edits save automatically after a short pause; the Save button remains available for an immediate save.

4 Step 4

Screenshot not available (the Playbook preview has not reached the production portal used for guide captures)

⚡ **Action:** Click Preview, then click Start preview. Reply as the customer to walk through the selected channel and language. Close the drawer when you finish.

✓ **What you should see:** A drawer opens from the right and runs the current draft, including edits that have not finished saving. External actions use sample responses, so the preview does not send a message, place an order, create a booking, or change another system. Voice preview uses a text transcript and does not start a phone call or produce audio. The active Playbook step opens as the preview moves through the conversation.

5 Step 5

Screenshot not available (the Playbook and Expert Map selector has not reached the production portal used for guide captures)

⚡ **Action:** Click Expert Map when a branch is easier to understand spatially. Select a node to open its detail panel. Use Playbook to return to the step-by-step document. If you need technical configuration, turn on Advanced Mode.

✓ **What you should see:** Expert Map shows the same steps and outcomes as a connected node graph, with a palette, search, zoom, fit-view, and minimap. Selecting a node opens the type-specific panel on the right. Advanced Mode adds JSON and lower-level graph, channel, and settings controls. Switching surfaces does not create a copy or lose fields; both views edit the same draft.

Troubleshooting

- The playbook appears to stop early: scroll inside the playbook region. Look for More steps below and confirm that End of playbook becomes visible at the true bottom.
- A step appears under Unconnected steps: one of its outcomes is not connected to that step. Choose it as an outcome target or repair the route in Expert Map.
- The playbook says the entry step does not exist: choose an entry step in conversation settings, or use Expert Map to repair the flow.
- Skills is not visible as a left rail: at narrower window sizes it becomes a Skills button and drawer.
- Preview will not start: open the skill from its skill set on the Blueprints page, then try again.
- Save reports that the playbook changed in another editor: refresh before editing again so the other person's work is not overwritten.

Notes

- Preferred route: `/conversation-editor/:blueprintSlug/:slug` . `/conversation-editor/:slug` remains as a compatibility route, but it may not have enough context for skill navigation or preview.
- Saving updates the draft only. Publishing saves the current draft first, records a new version, and attempts to rebuild the live conversation. Read the result message to confirm whether the new version is live. If a rebuild or smoke test fails, customers stay on the previous version.
- The status alert identifies the version being edited and the version customers currently receive. After publishing, the editor can move forward to a new draft while customers continue to receive the published version.
- The editor remembers the Playbook or Expert Map choice and the Advanced Mode preference in this browser.
- Platform administrator controls include the NLU tab on prompt steps and creation or configuration of AI Response steps. Existing AI Response steps remain visible to regular members but cannot be configured.
- Source components: `features/flow-editor/components/ConversationEditorShell.jsx` , `PlaybookEditor.jsx` , `PlaybookStepCard.jsx` , `SkillRail.jsx` , `ConversationPreviewPanel.jsx` , `FlowEditor.jsx` , and `NodeDetailPanel.jsx` in the portal app.