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Designer User's Guide

Applications

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- Administrator

Create new applications and make changes to existing ones.

Related documentation:

-

From the **Applications** page, you can create new applications and manage existing ones.

Application types

Designer has three primary application types:

Default

These applications support Interactive Voice Response (IVR) and voice call routing. They also support chat if the omnichannel option is enabled in the application settings.

Important

When a Default type application is enabled for omnichannel, it can handle voice, chat, and SMS interactions. However, note that the **Menu** block does not support SMS media.

Digital

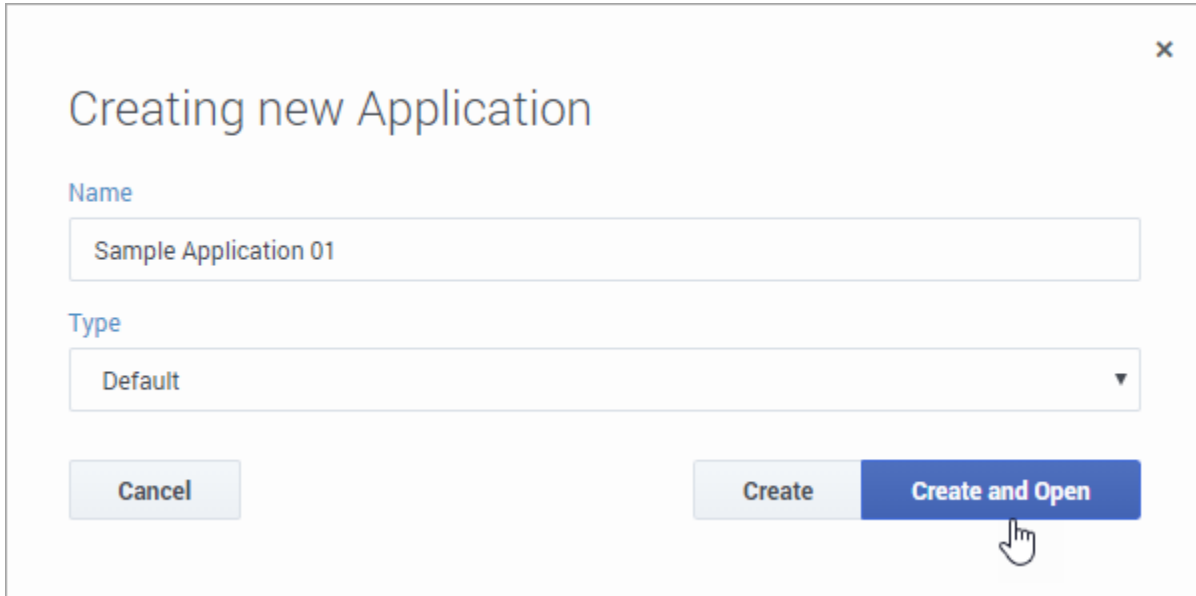
This application type supports digital interactions only, such as email and open media (no voice calls).

Callback

This application type is used for setting up outbound callbacks (voice calls only). Digital interactions are not supported. For more information about using Callback with Designer, see Provisioning Callback in Designer in the *Callback Administrator's Guide*.

Creating a new application

To create a new application, click **Add Application**.



The screenshot shows a dialog box titled "Creating new Application" with a close button (X) in the top right corner. It contains two input fields: "Name" with the text "Sample Application 01" and "Type" with a dropdown menu set to "Default". At the bottom, there are three buttons: "Cancel", "Create", and "Create and Open". A mouse cursor is pointing at the "Create and Open" button.

Enter a **Name** for the application and select the Type of application you want to create.

Click **Create** to save it and go back to the **Applications** page. Or, click **Create and Open** to save the application and open it for editing. To learn more about how to build applications using the blocks in Designer, see Using the blocks.

Viewing application properties

From the **Applications** list, click an empty spot in an application's row to display its properties on the right-hand side (if you click the application name, it will open for viewing or editing):

Applications

Applications

+ Add Application Import Application

Quick Filters Chatbots

Name	Tags	Last updated	Last published
Joules Coulomb Direct Sales Designer sample application.	Sample	Today at 3:08 PM	

Joules Coulomb Direct Sales
Designer sample application.
Sample

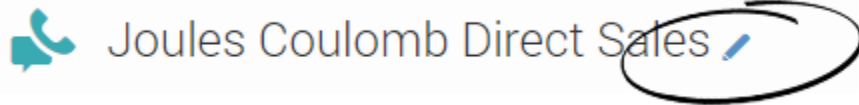
Status	Stream	Builds	Phone Numbers	Chat EndPoints
<input checked="" type="checkbox"/>	DEV	Latest Published	Unassigned	JoulesChat01_dev
<input checked="" type="checkbox"/>	QA	Select	Unassigned	JoulesChat01_qa
<input checked="" type="checkbox"/>	UAT	Select	Unassigned	JoulesChat01_uat
<input checked="" type="checkbox"/>	LIVE	Select	Unassigned	JoulesChat01_live

Clone application Export application Manage Builds

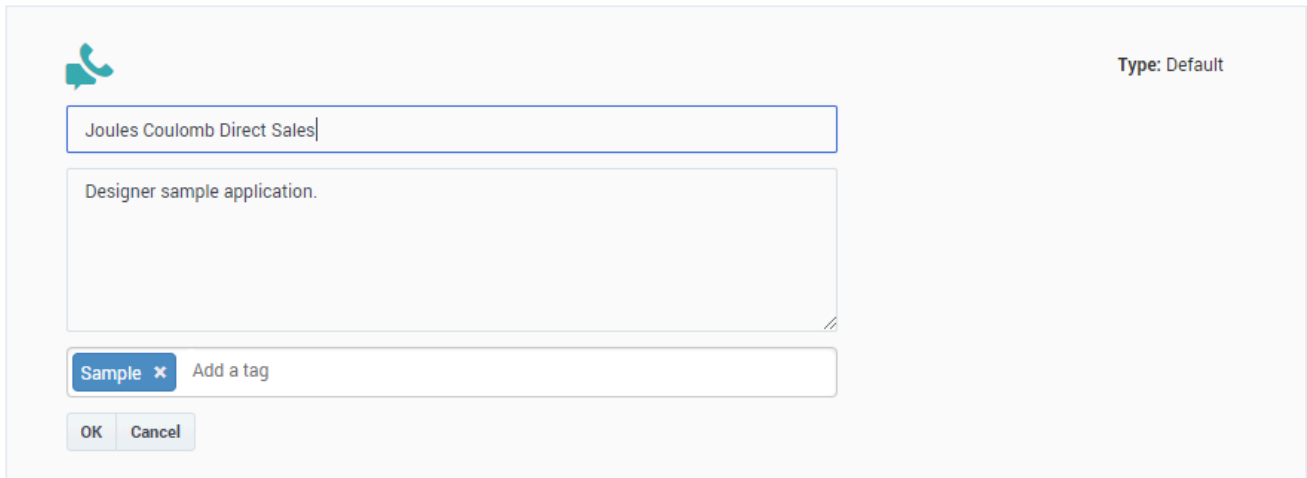
Manage Chat Endpoints Disconnect Phone Numbers & Chat EndPoint

Edit the application name, description, or tags

Click the pencil icon to open the editing view.



From the editing view, you can change the application **name**, **description**, or manage the **tags** associated with the application.



Joules Coulomb Direct Sales

Designer sample application.

Sample x Add a tag

OK Cancel

Type: Default

Tip

You can also view or make changes to the application name and description by clicking the application name when its flow is open for editing.

Change the status of an application stream

Use the sliders to change the status of an application stream to enabled or disabled.

To enable:




To disable:



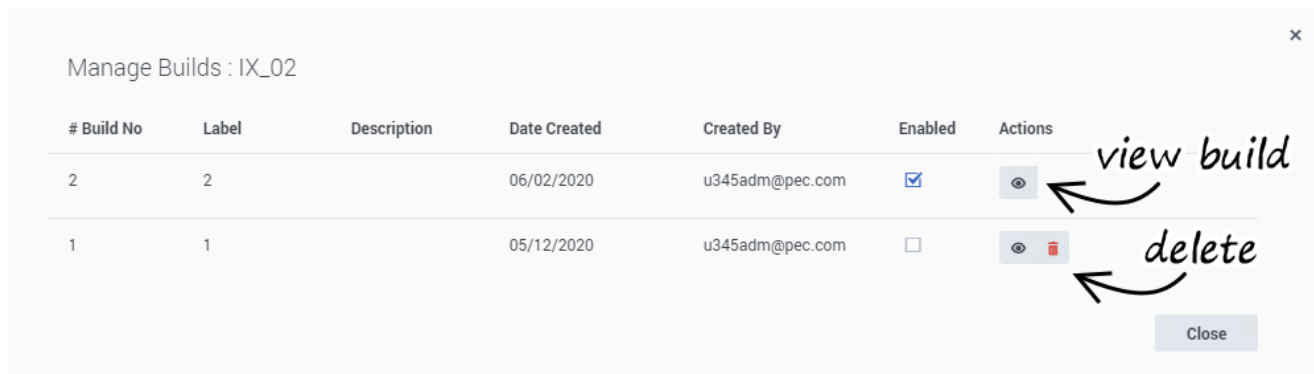
Viewing application history




Click  **Application History** to see a list of historical events for the application, such as each time it was viewed, edited, or published. You can then drill-down into each event to review its audit details. For more information, see [History View](#).

Clone an application

Click  **Clone application** to create a new application that is an exact copy of the selected application. Save the clone with a unique name and then manage it like any other application. This can be useful when you want to use the same structure as the selected application, but need to specify different settings or resources.

Manage Builds



# Build No	Label	Description	Date Created	Created By	Enabled	Actions
2	2		06/02/2020	u345adm@pec.com	<input checked="" type="checkbox"/>	
1	1		05/12/2020	u345adm@pec.com	<input type="checkbox"/>	 

Click  **Manage Builds** to manage the application builds that are available for the application.

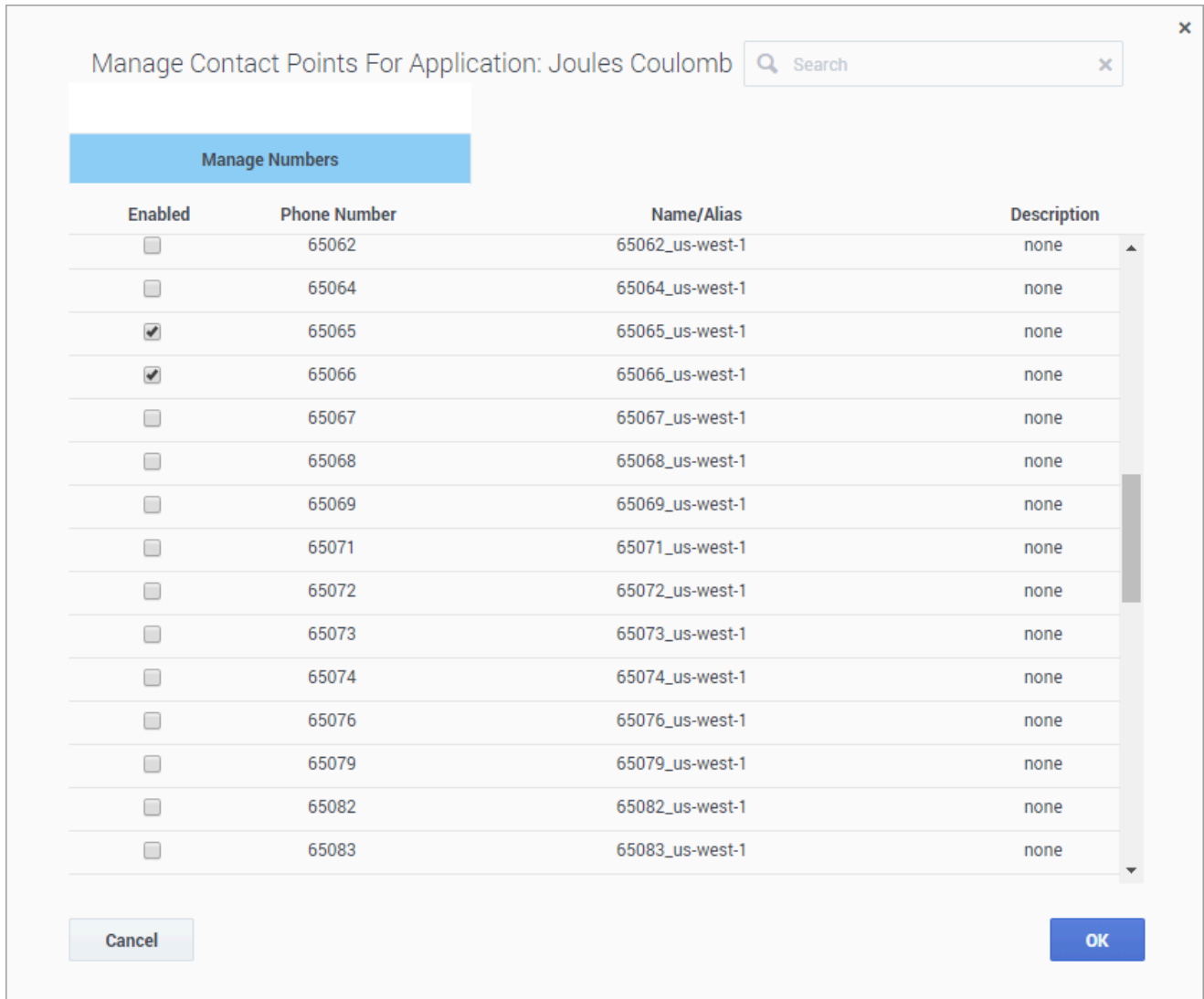
All builds are initially enabled by default. To disable a build, deselect it.

To view the application flow for a build, click the **View Build** icon under the **Actions** column. This displays the application flow as it existed when the build was generated (in read-only mode).

To delete a build, you must first disable it. This reveals a trash icon under the **Actions** column that you can click to delete the build.

For more information about builds, see Application builds.

Manage Phone Numbers



Click **Manage** in the **Phone Number** column to select and assign a phone number(s) to the application.

When assigning a phone number:

- You cannot assign a phone number to **IVR** type applications.
- You cannot assign a phone number to an application that has not been published at least once.
- You might see a warning symbol beside a phone number that is assigned to your application. This warning symbol can indicate:
 - The phone number was not assigned in Designer.
 - The application was updated but the changes were not published.

This warning symbol indicates there could be a problem with the phone number; it does not indicate whether the phone number is functional.

You can ignore the warning if you are certain the phone number is functional. If you are not sure whether the phone number is functional, contact your Genesys representative.

Batch Assign

What if you have a large list of phone numbers that you want to assign to the application? With **Batch Assign**, you can copy and paste the phone numbers into a form and assign them in a single operation.

Here's how it works:

Click **Batch Assign** and add the numbers you want to assign to the input column. Note that the numbers must be on separate lines. Designer keeps track of the numbers you've added in the **Recognized phone numbers** column.

The screenshot shows a web interface titled "Manage Contact Points For Application: Joules Coulomb Direct Sales". On the left, there is a vertical list of four steps: "1. Input Numbers" (highlighted in blue), "2. Review", "3. Assign", and "4. Complete". Below this list are two buttons: "Cancel" and "Next (review)". In the center, there is a text input field containing the following phone numbers on separate lines: 65271, 65274, 65276, 65280, 65289, and 65293. To the right of the input field, the text "Recognised phone numbers: (count: 6)" is displayed, followed by the list "65271 , 65274 , 65276 , 65280 , 65289 , 65293".

When you are finished adding numbers, click **Next (review)**.

You can review the results to see the phone numbers that are ready to be assigned, are already assigned to this application (or another application), or were not found — maybe these were entered incorrectly or are not available for use.

If you need to make changes, click **Previous**. Otherwise, click **Assign the numbers**.

Manage Contact Points For Application: Joules Coulomb Direct Sales

1. Input Numbers
2. Review
3. Assign
4. Complete

Ready to assign (count: 6)	Already assigned to this (count: 0)	Already assigned to others (count: 0)	Not Found (count: 0)
65271	None	None	None
65274			
65276			
65280			
65289			
65293			


Cancel
Previous
Assign the numbers

You can monitor the progress as Designer assigns the phone numbers to the application:

6 of 6 phone numbers provisioned. ×

Manage Contact Points For Application: Joules Coulomb Direct Sales

1. Input Numbers
2. Review
3. Assign
4. Complete



6 out of 6 done. Preparing results...

Please Wait...

When the operation completes, Designer shows you which numbers were successfully assigned and which (if any) failed.

Manage Contact Points For Application: Joules Coulomb Direct Sales

- 1. Input Numbers
- 2. Review
- 3. Assign
- 4. Complete

Success (count : 6)

Number	Name/Alias
65271	65271_us-west-1
65274	65274_us-west-1
65276	65276_us-west-1
65280	65280_us-west-1
65289	65289_us-west-1
65293	65293_us-west-1

Fail (count : 0)

Number	Name/Alias
--------	------------

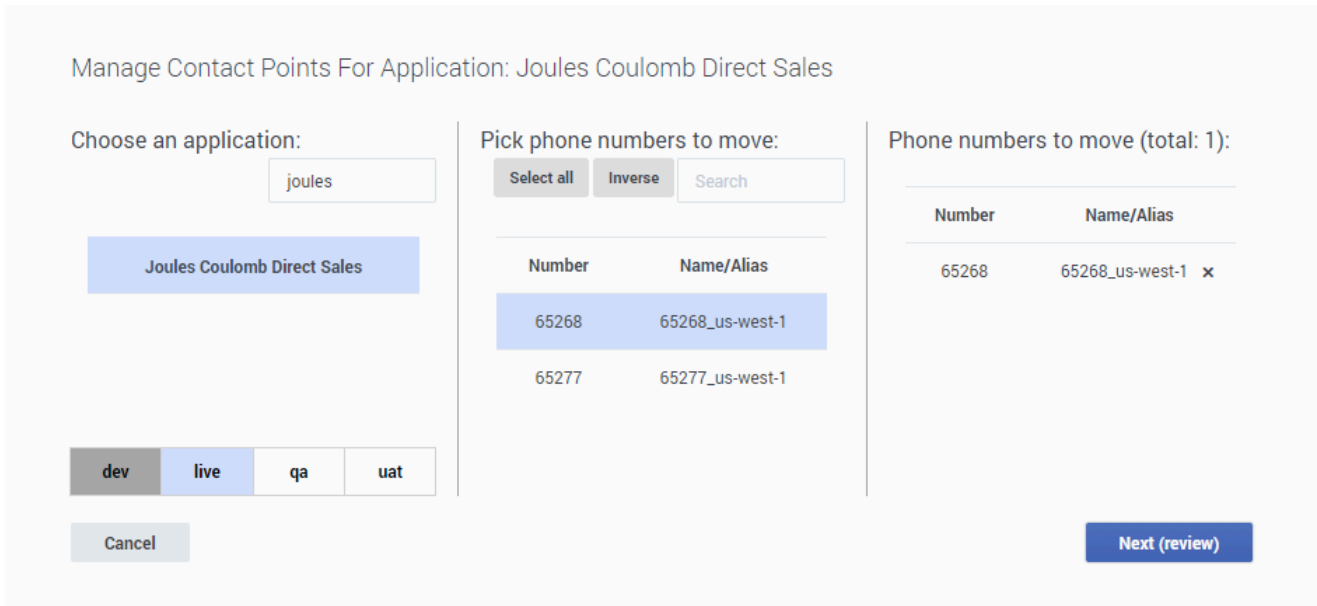
OK

Click **OK** to close the window.

Transfer from Others

Use **Transfer from Others** to transfer multiple phone numbers to another application or to other stream of the current application. To show an example of how this works, let's transfer a phone number to another stream of an application.

We've clicked **Manage Phone Numbers** for the Joules Coulomb application and selected **Transfer from Others**:

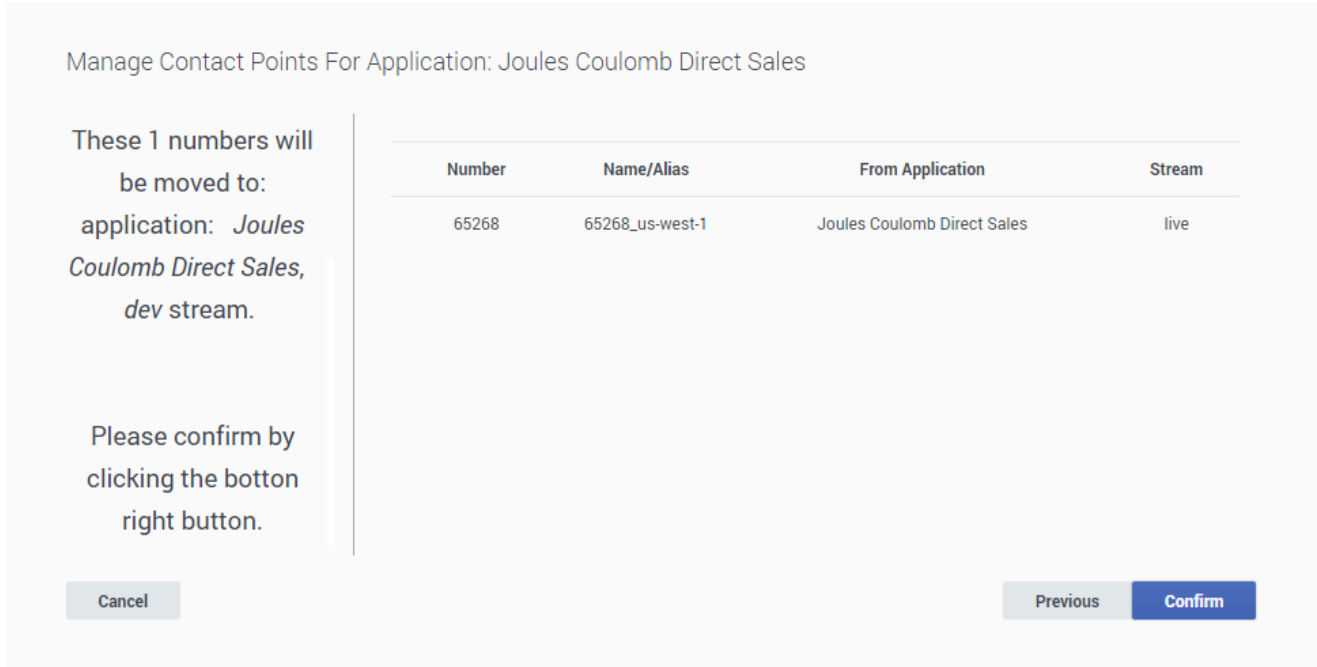


We want to transfer a number to a stream of the current application, so we use the search bar to filter the application list for "Joules". We select it, and the stream tabs appear at the bottom.

We want to move a number from LIVE to DEV, so we select the **LIVE** tab.

There are two numbers assigned to that stream, but we only want to move one of them. We select the number we want to move and click **Next (review)**.

Review the transfer details:



If you need to make any changes, click **Previous**. If everything looks ok, click **Confirm**.

Designer shows you the progress of the transfer. When it is complete, the summary lists the numbers that were successfully transferred and also any that failed.

Manage Contact Points For Application: Joules Coulomb Direct Sales

Success:

Number	Name/Alias
65268	65268_us-west-1

Fail:

Number	Name/Alias
--------	------------

Cancel OK

Click **OK** to close the transfer results window and return to the application properties.

Manage Mail Boxes

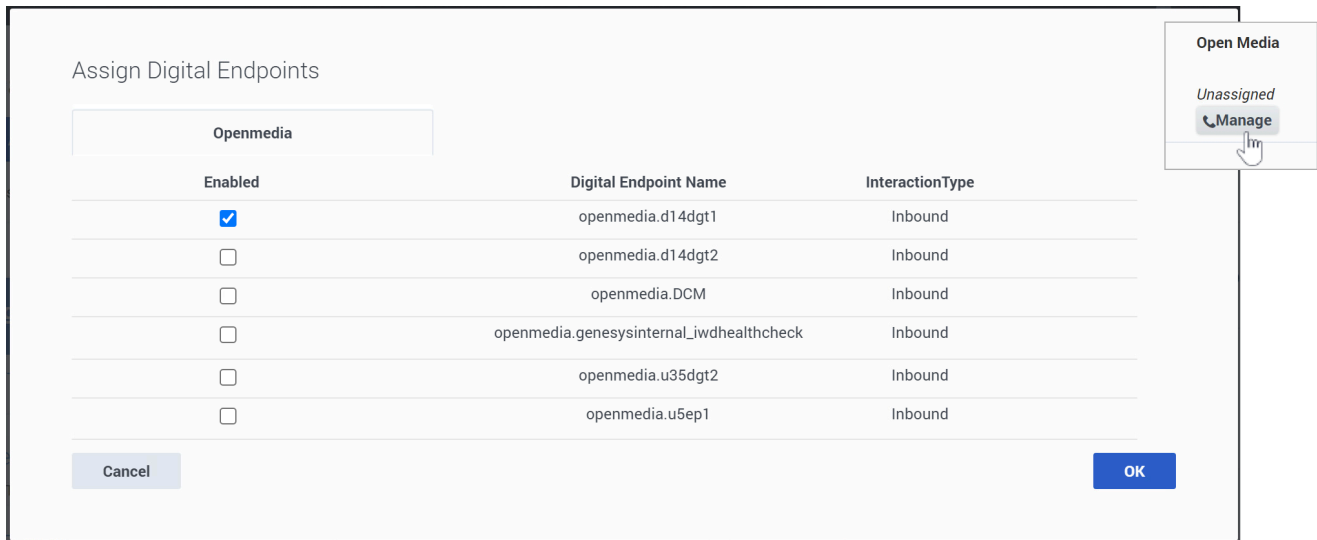
Digital IX Type Digital

Status	Stream	Builds	Mail Boxes	Open Media	Chat EndPoints
<input checked="" type="checkbox"/>	DEV	Latest Published	Unassigned Manage	Unassigned Manage	Unassigned
<input type="checkbox"/>	QA	Select	Unassigned Manage	Unassigned Manage	Unassigned
<input type="checkbox"/>	UAT	Select	Unassigned Manage	Unassigned Manage	Unassigned
<input type="checkbox"/>	LIVE	Select	Unassigned Manage	Unassigned Manage	Unassigned
<input type="checkbox"/>	LIVE B	Select	Unassigned Manage	Unassigned Manage	Unassigned

Click **Manage** in the **Mail Boxes** column to select and assign a mail box to the application.

- This option is available for **Digital** type applications only.
- The mail box is assigned only to the application stream for which it was selected.
- Mail Boxes are managed and configured in Agent Setup. For more information, contact your Genesys representative.

Manage Open Media endpoints

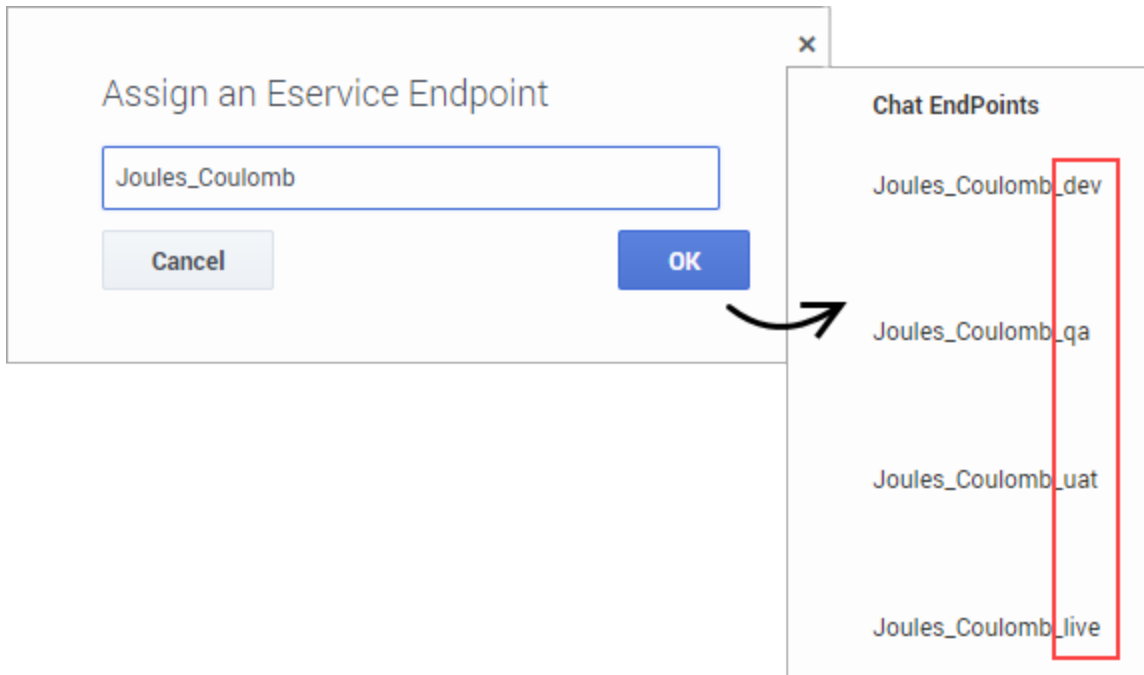



Click **Manage** under **Open Media** to select and assign an Open Media endpoint to the application.

When assigning an Open Media endpoint:

- This option is available for **Digital** type applications only.
- The endpoint is assigned only to the application stream for which it was selected.
- Open Media endpoints are managed and configured in **Agent Setup**. For more information, contact your Genesys representative.

Manage Chat Endpoints





Click  **Manage Chat Endpoints** column to assign a chat endpoint to the application.

When assigning a chat endpoint:

- You can only assign digital endpoints in **Default** type applications that are enabled for **omni-channel support** (see the digital tab in Application Settings).
- Enter a name that is unique across all applications.
- The name should indicate the origination point of the chat (for example, *sales_page* or *mortgage_division*).
- Use alphanumeric characters only. Avoid using spaces or special characters (underscores are ok).
- The selected endpoint is assigned to each of the application streams, with a naming extension that corresponds to the stream. For example, ChatEndpoint>_dev, _qa, and so on.

Manage Digital Endpoints


DialogFlowCX_CarRental_Demo Type Default					
sandy Demo Bot					
Status	Stream	Builds	Phone Numbers	Chat EndPoints	Digital Endpoints
<input checked="" type="checkbox"/>	DEV	Latest Published	Unassigned Manage	Unassigned	  Manage
<input checked="" type="checkbox"/>	QA	Select	Unassigned Manage	Unassigned	Unassigned Manage
<input checked="" type="checkbox"/>	UAT	Select	Unassigned Manage	Unassigned	Unassigned Manage
<input checked="" type="checkbox"/>	LIVE	Select	Unassigned Manage	Unassigned	Unassigned Manage
<input checked="" type="checkbox"/>	LIVE B	Select	Unassigned Manage	Unassigned	Unassigned Manage

Click **Manage** in the **Digital Endpoints** column to select and assign a digital endpoint to an application stream. Digital endpoints include platforms such as Facebook, Twitter, SMS, and WhatsApp.

When assigning a digital endpoint:

- You can only assign digital endpoints in **Default** type applications that are enabled for **omni-channel support** (see the digital tab in Application Settings).
- The endpoint is assigned only to the application stream for which it was selected.
- Digital endpoints are managed and configured outside of Designer. For more information, contact your Genesys representative.

Disconnect Phone Numbers and Chat Endpoint

Click  **Disconnect Phone Numbers and Chat Endpoint** to disconnect *all* phone numbers and the chat endpoint from the application (you might need to click **More** to see this option). Once disconnected, the phone numbers or endpoint can be assigned to other applications.

If you want to disconnect specific numbers from an application stream, click **Manage** under the **Phone Numbers** column for that stream to deselect the number(s) you want to disconnect

Enabling Your Application

After you have assigned a phone number to your application, you can enable it by clicking the switch icon in the **Status** column. The switch icon turns green when the application is enabled.

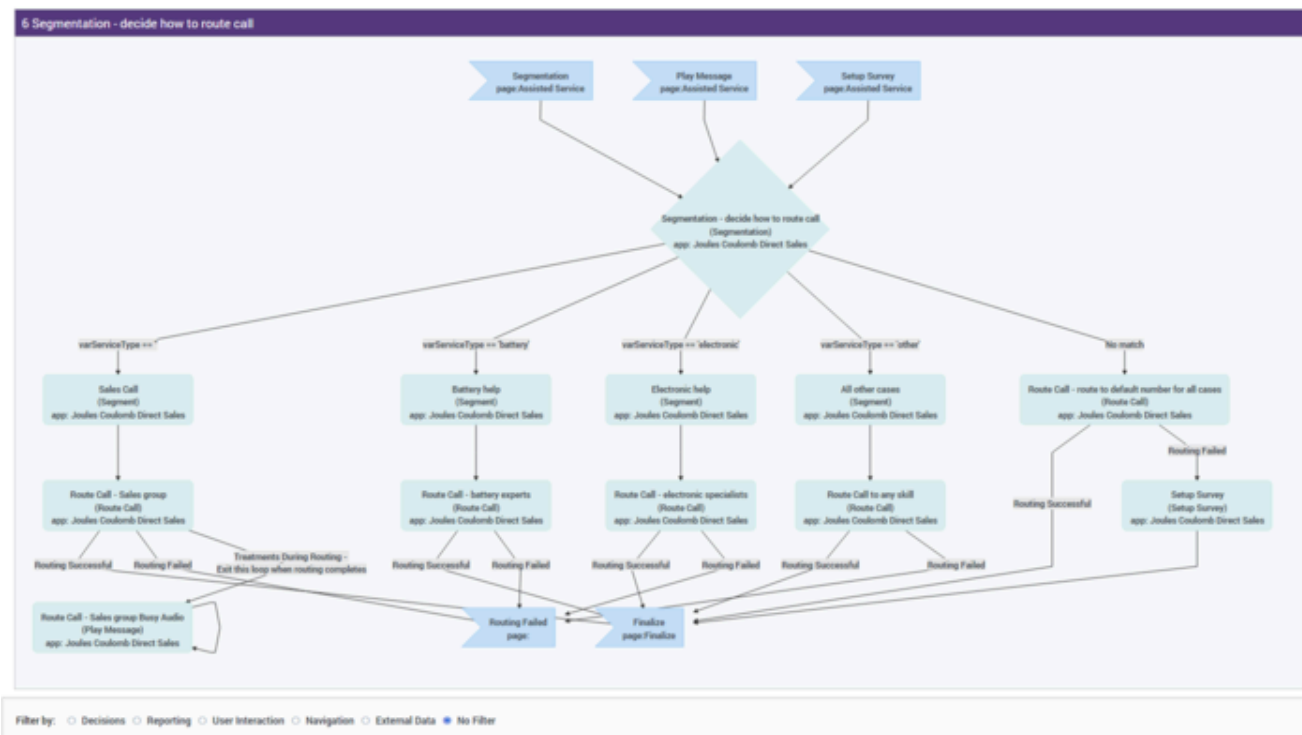
Viewing the application summary

When an application is displayed the flow section, you can use **Views > Summary** to generate a visualization of the application.

The resulting diagram is similar to a hierarchical flow-chart, with each node representing a block in the application flow:

The application summary view shows all the possible paths that an interaction can take through the application. The diagram is divided into sections for each application phase, and for nodes that need to be expanded into their own sections due to their size or complexity.

For example, this section shows a **Segmentation** node:



Filtering

Use the **Filter by** options to focus on specific details. You can choose to filter the diagram by **Decisions, Reporting, User Interaction, Navigation, or External Data.**

Select **No Filter** to clear any selected filtering options.

Session playback

You can use **Select a Timestamp to Trace** to select and display the path that a specific session took through the application, or click **Trace Last Call** to load the path of the last session that was processed.

The path that the session took is indicated by red flashing connecting lines and highlighted nodes:

The screenshot displays the 'Application Summary (BETA) - Joules Coulomb Direct' interface. At the top, it shows the version (8.5.202.57) and the user (voice_2275_admin). Below this, there is a dropdown menu labeled 'Select a Timestamp to Trace' and a button labeled 'Trace Last Call'. The main content area is divided into two sections: '1 Initialize' and '2 Self Service'. The '1 Initialize' section shows a flowchart starting with 'Initialize (Initialize) app: Joules Coulomb Direct Sales' leading to 'Self Service page:Self Service'. The '2 Self Service' section shows a flowchart starting with 'Initialize page:Initialize' leading to 'Self Service (Self Service) app: Joules Coulomb Direct Sales', which then leads to 'Emergency check (Emergency) app: Joules Coulomb Direct Sales'. On the right side, there is a vertical list of steps: 1 Initialize, 2 Self Service, 3 Menu - Main Options, 4 Service Menu Options, 5 Assisted Service, 6 Segmentation - decide how to route call, and 7 Finalize. At the bottom, there is a 'Filter by:' section with radio buttons for Decisions, Reporting, User Interaction, Navigation, External Data, and No Filter (which is selected).

Click **Reset** to clear the playback details for the selected session.

Application settings

To view and manage the settings for an application, see [Application settings](#).