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Designer User's Guide

Applications

12/26/2025

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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

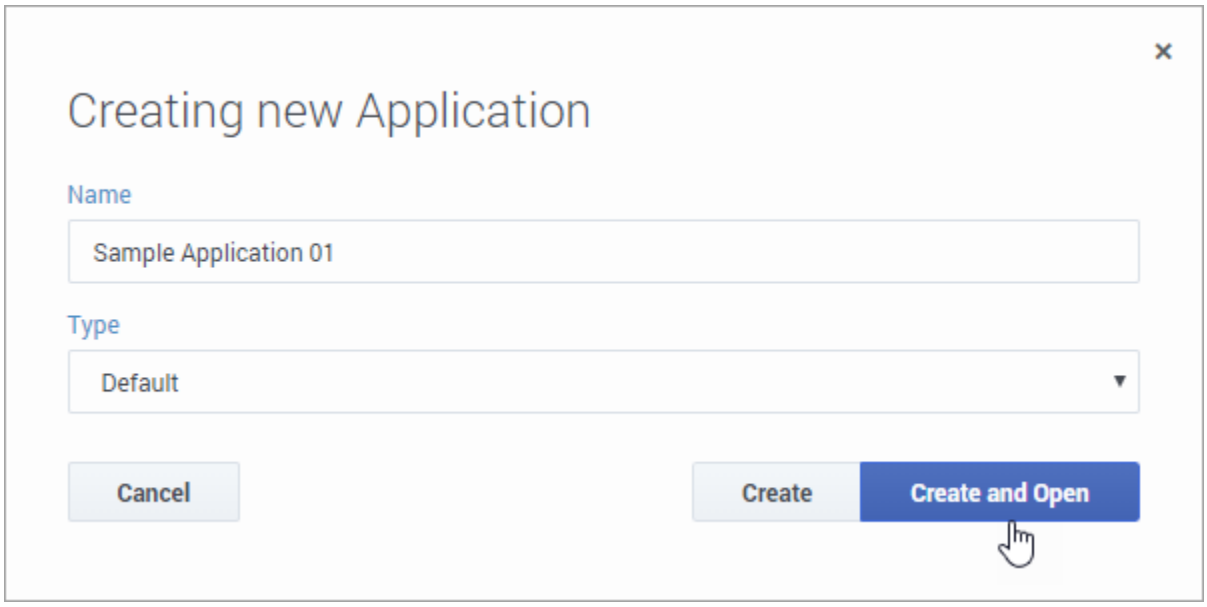
This application type supports digital interactions only, such as email and open media (no voice calls).

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**.

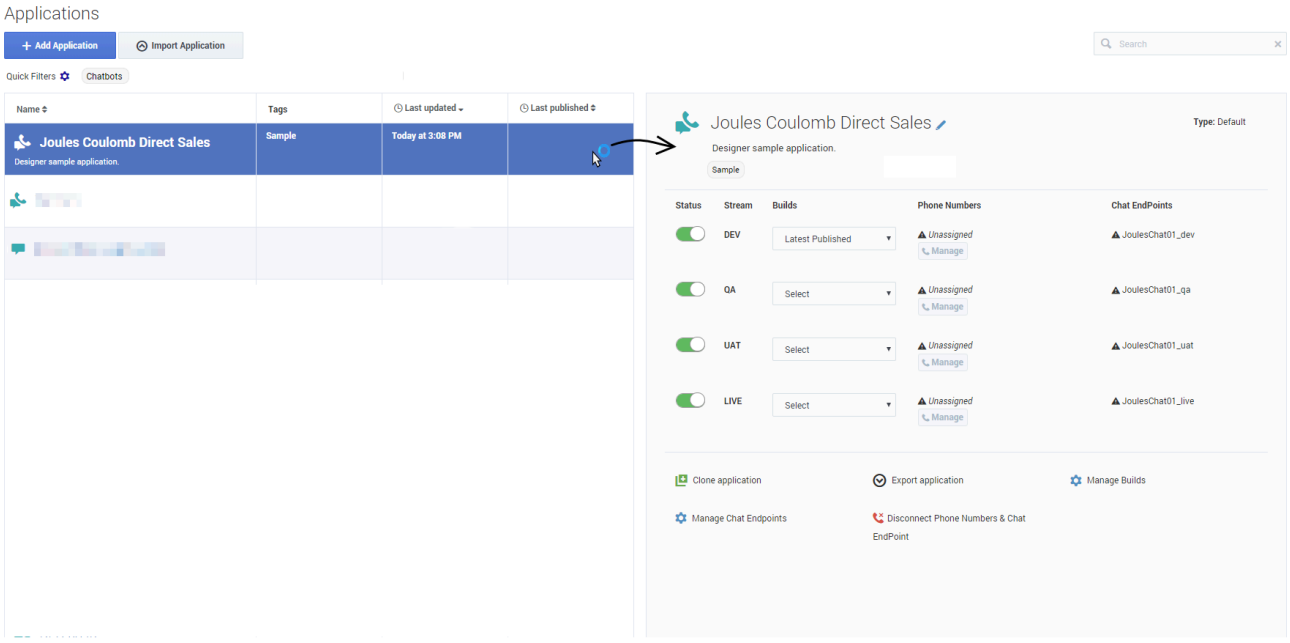


Enter a **Name** for the application and select the Type of application you want to create.

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.

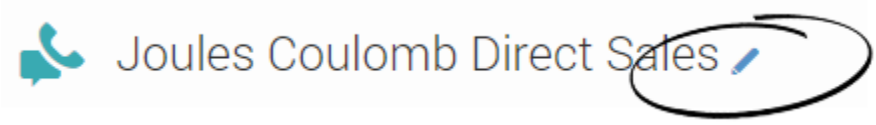
Viewing application properties

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):

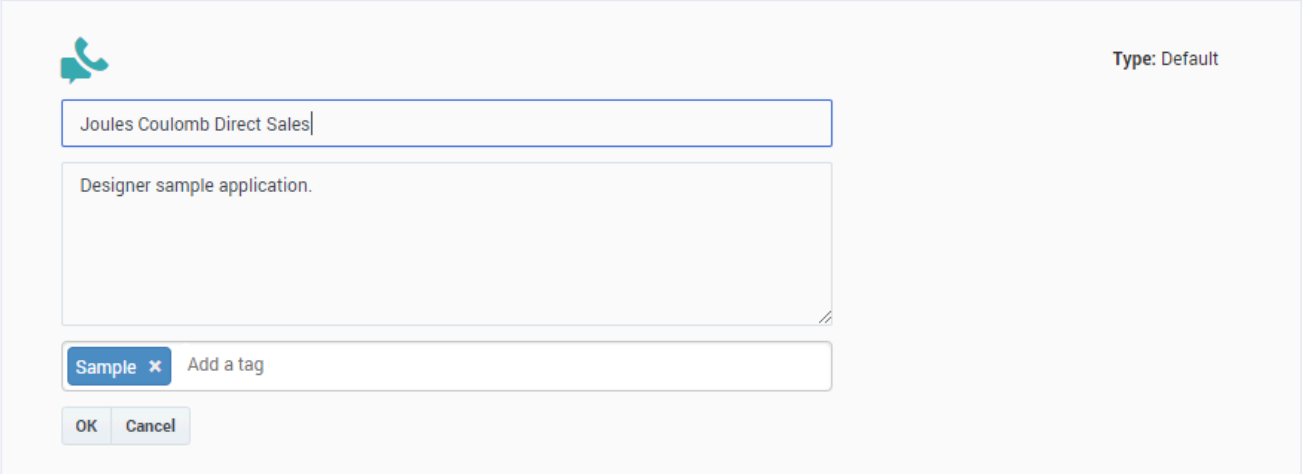


Edit the application name, description, or tags

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.



> **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:

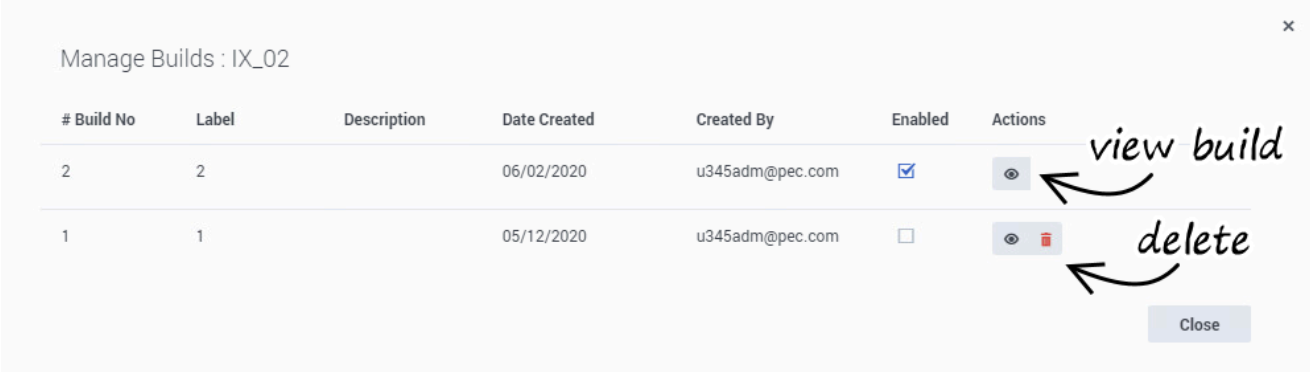
Viewing application history

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



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

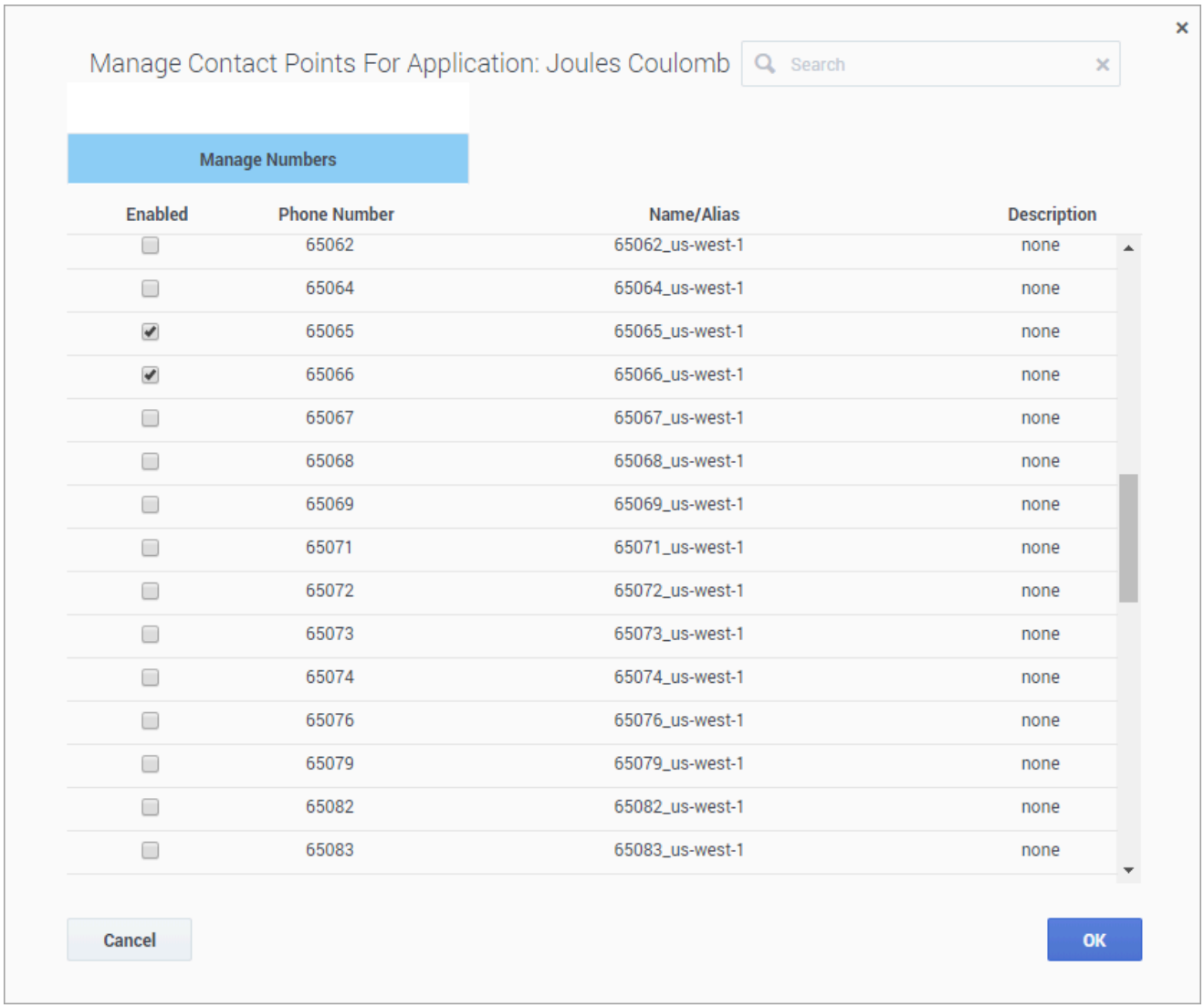
All builds are initially enabled by default. To disable a build, deselect it.

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.

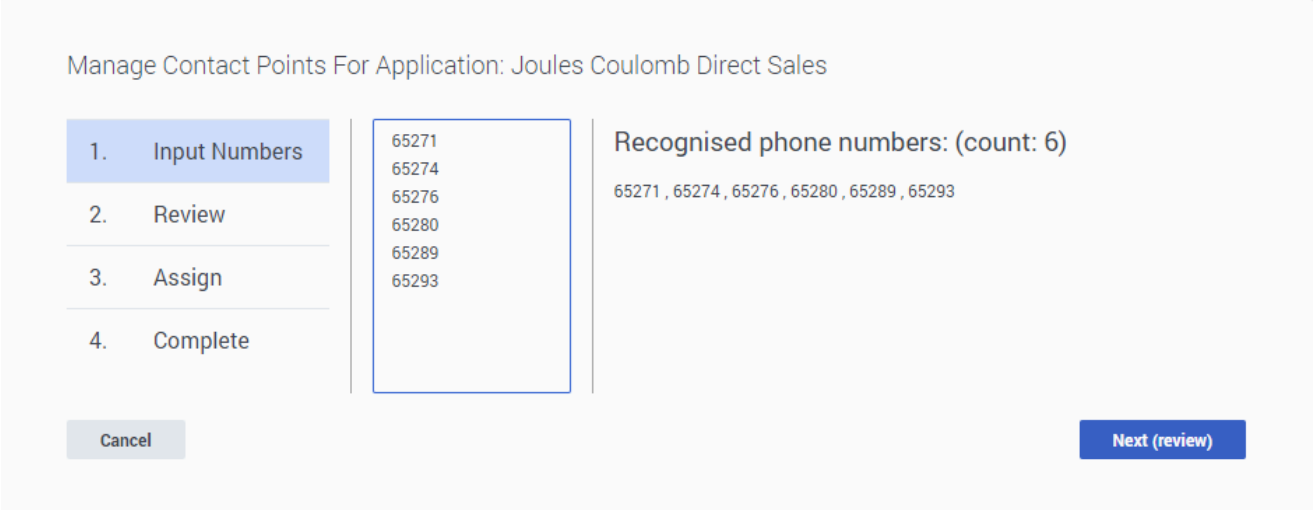
You can ignore the warning if you are certain the phone number is functional. If you are not sure whether the phone number is functional, contact your Genesys representative.

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:

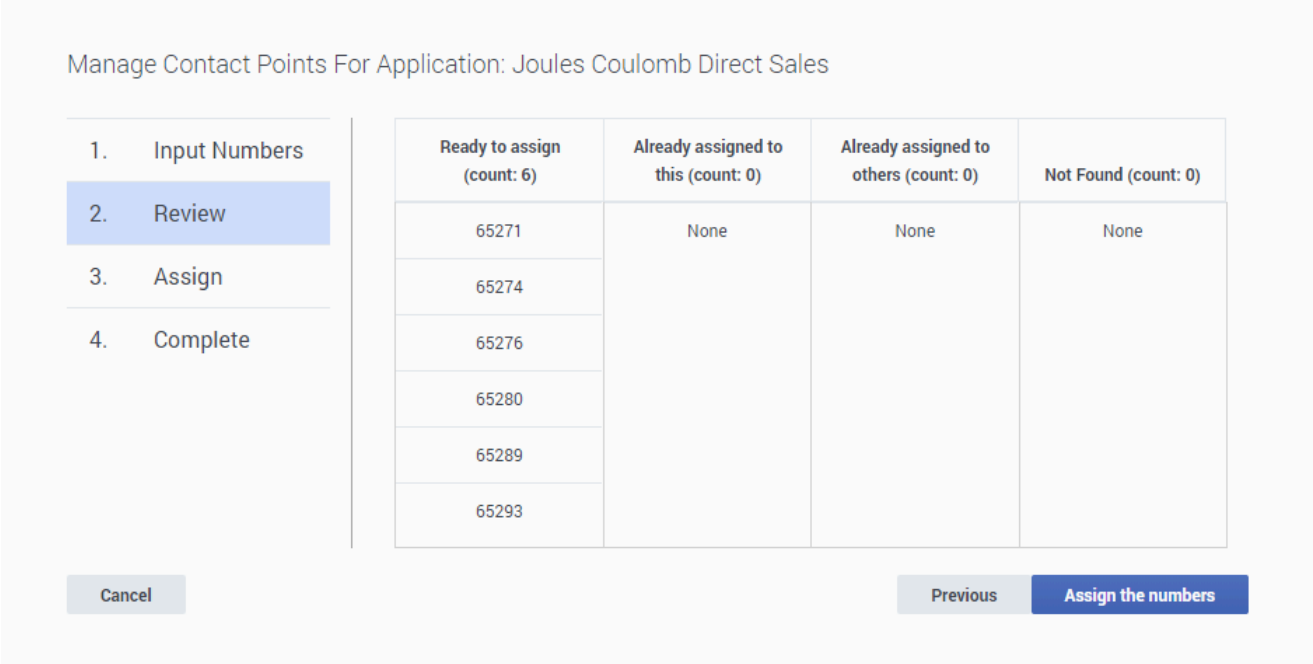
Click **Batch Assign** and add the numbers you want to assign to the input column. Note that the numbers must be on separate lines. Designer keeps track of the numbers you've added in the **Recognized phone numbers** column.



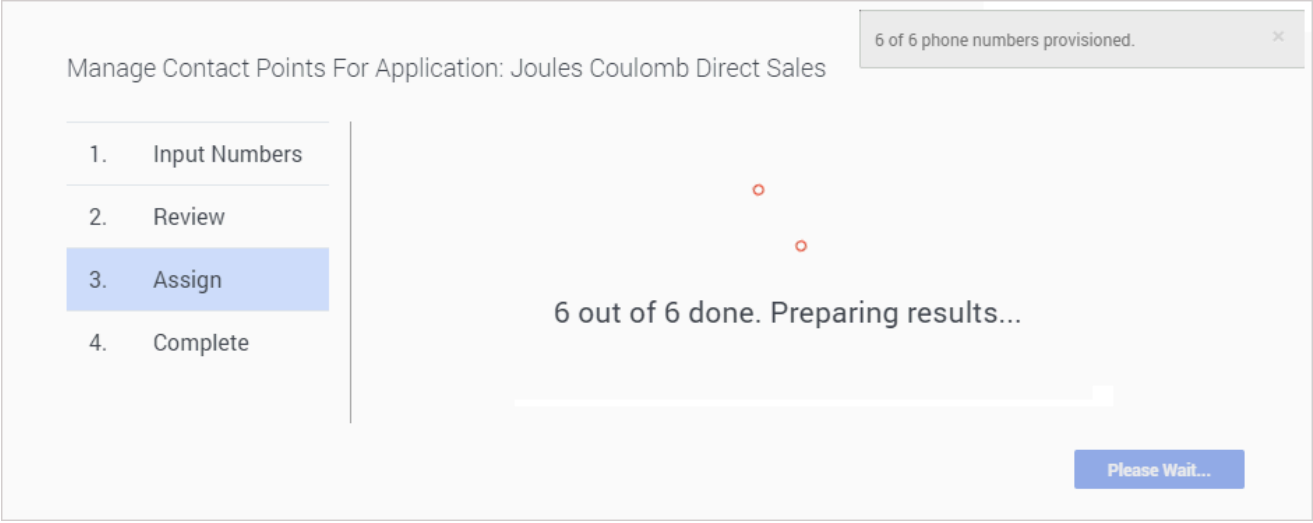
When you are finished adding numbers, click **Next (review)**.

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.

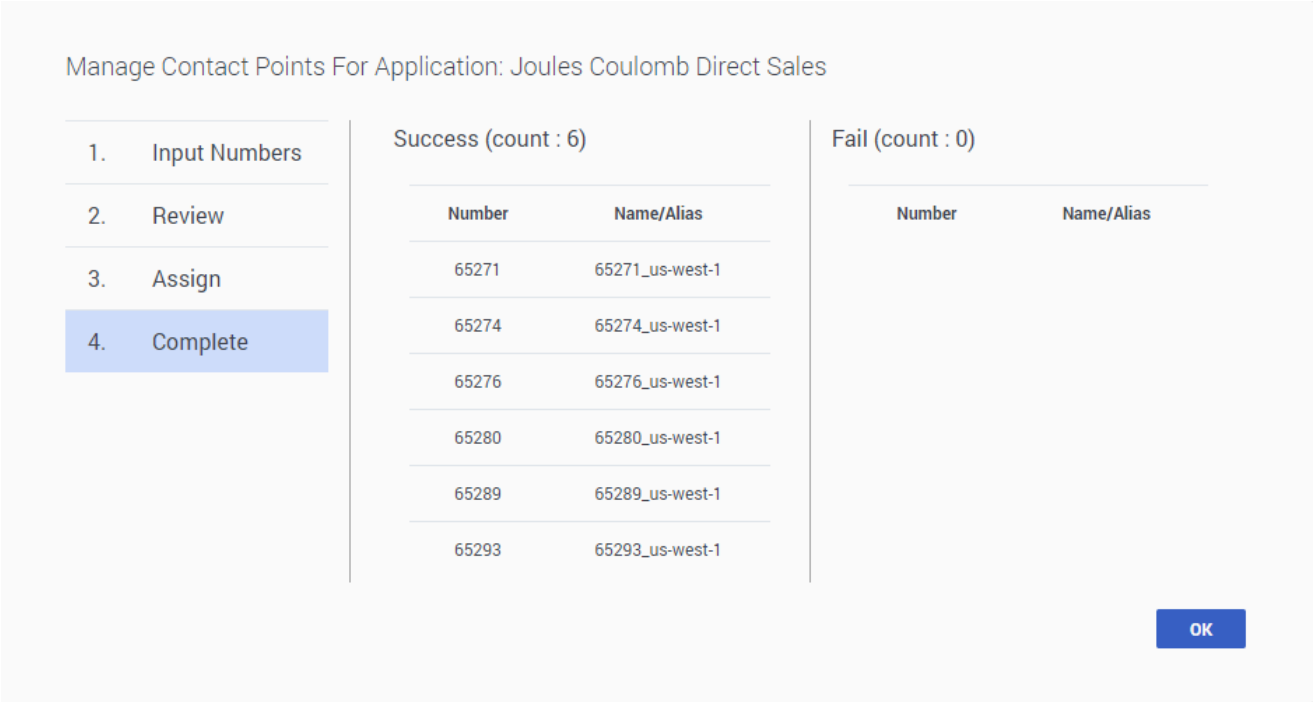
If you need to make changes, click **Previous**. Otherwise, click **Assign the numbers**.



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



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

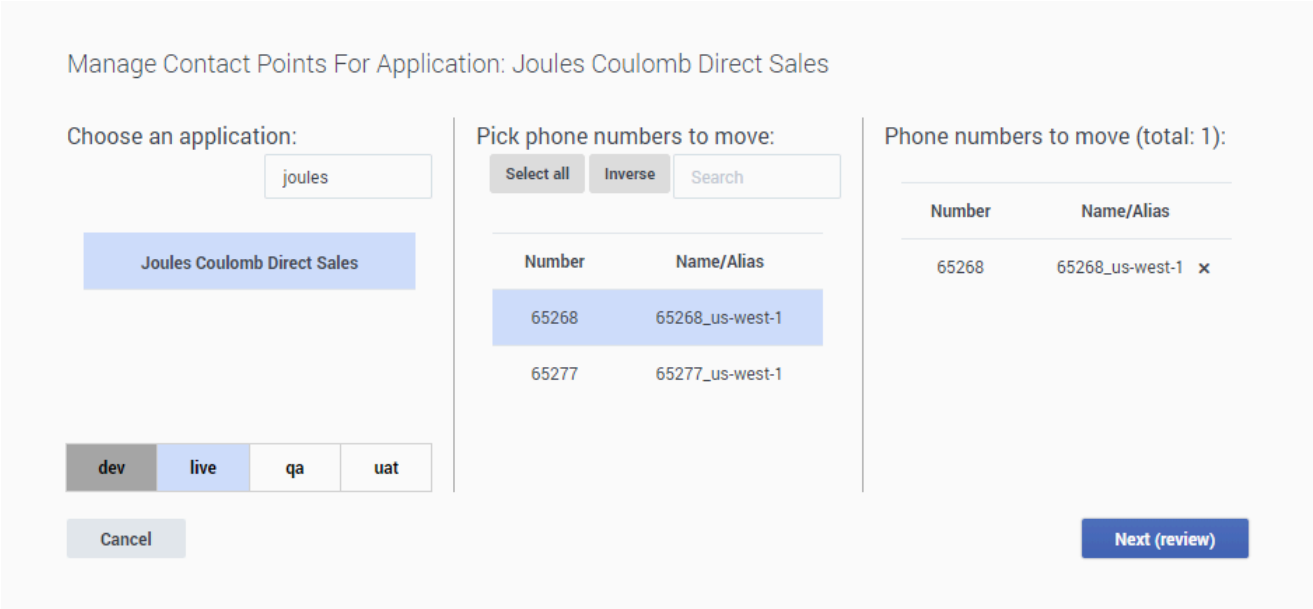


Click **OK** to close the window.

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**:

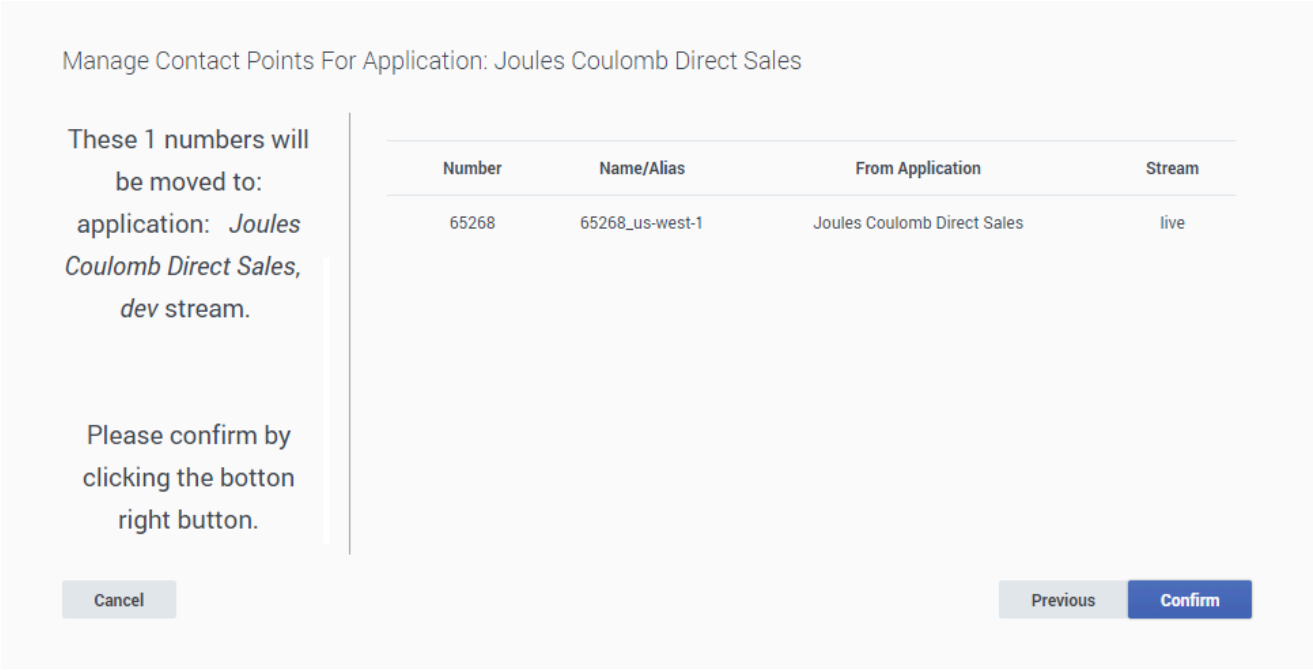


We want to transfer a number to a stream of the current application, so we use the search bar to filter the application list for "Joules". We select it, and the stream tabs appear at the bottom.

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

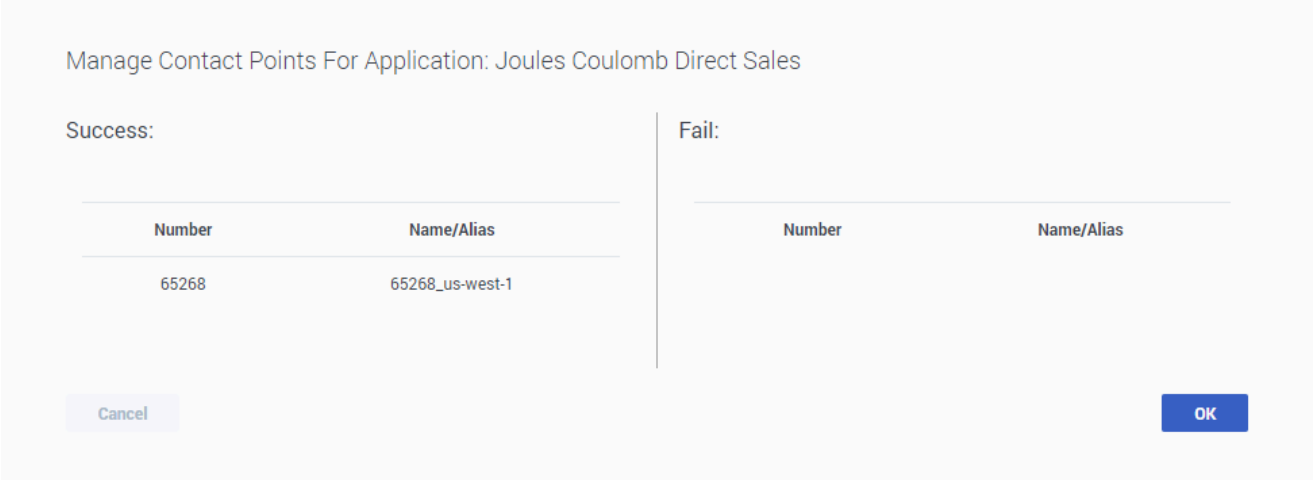
There are two numbers assigned to that stream, but we only want to move one of them. We select the number we want to move and click **Next (review)**.

Review the transfer details:



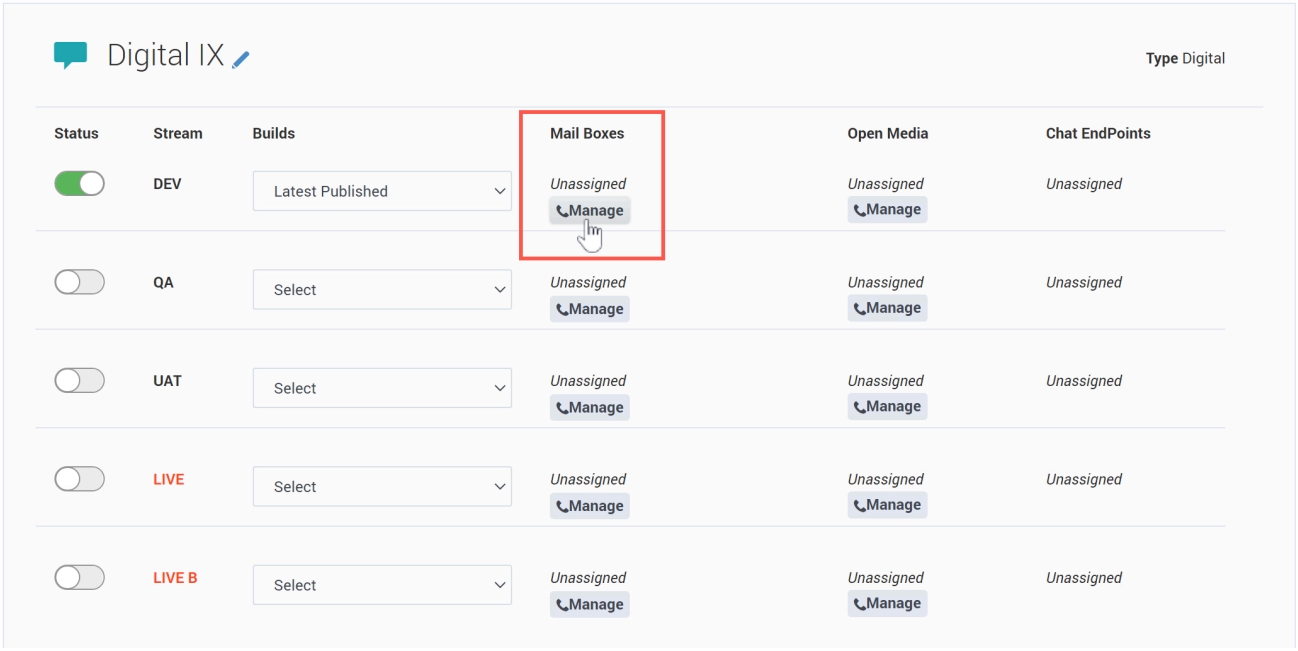
If you need to make any changes, click **Previous**. If everything looks ok, click **Confirm**.

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.



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

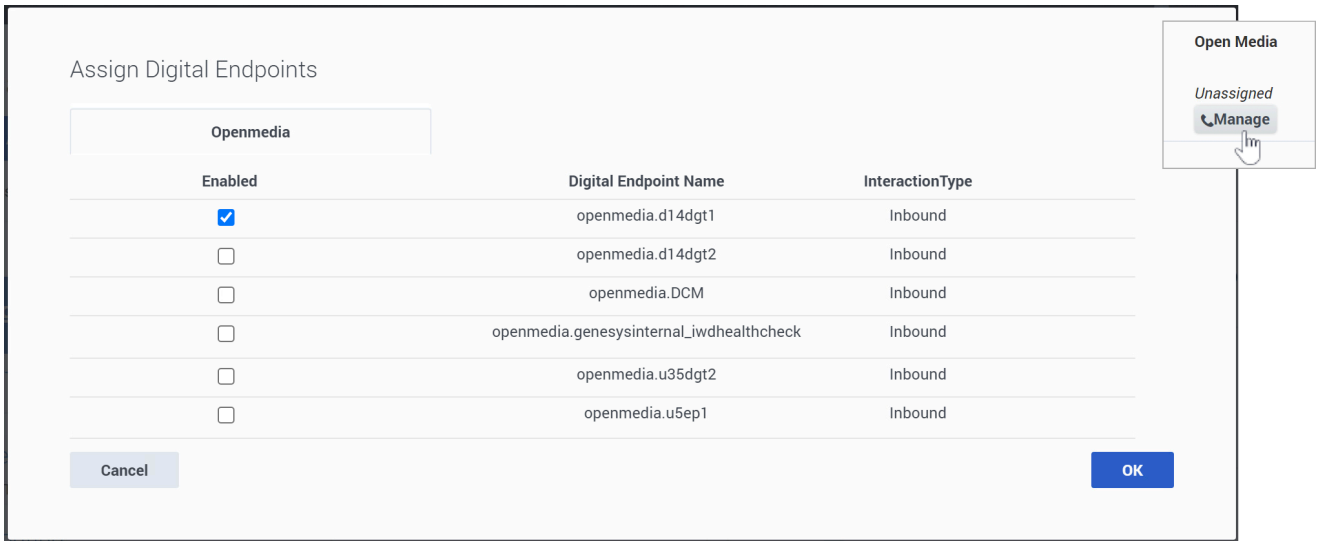
Manage Mail Boxes



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

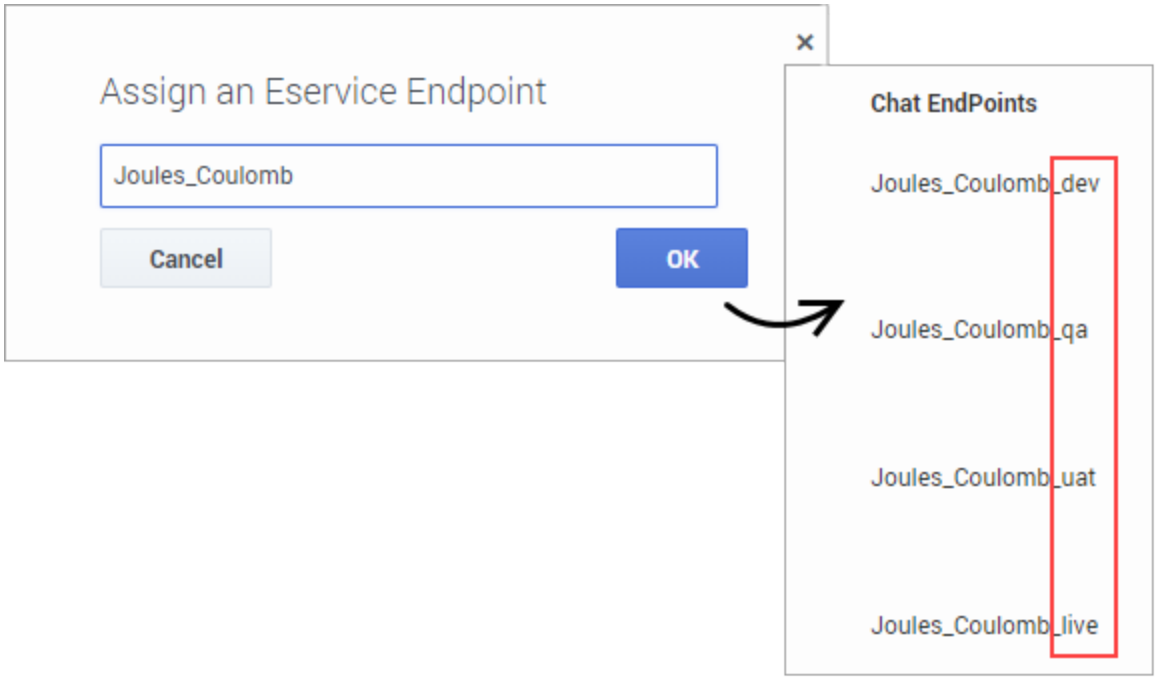


Click **Manage** under **Open Media** to select and assign an Open Media endpoint to the application.

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

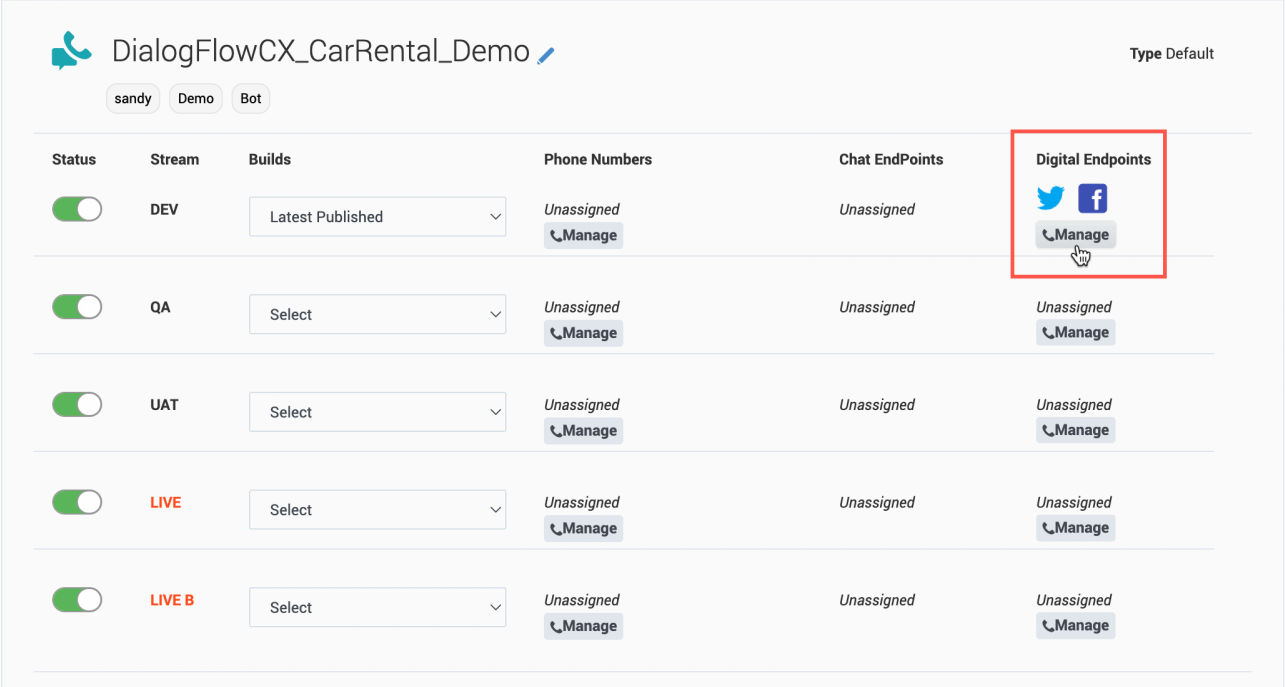


Click **Manage Chat Endpoints** column to assign a chat endpoint to the application.

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



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.

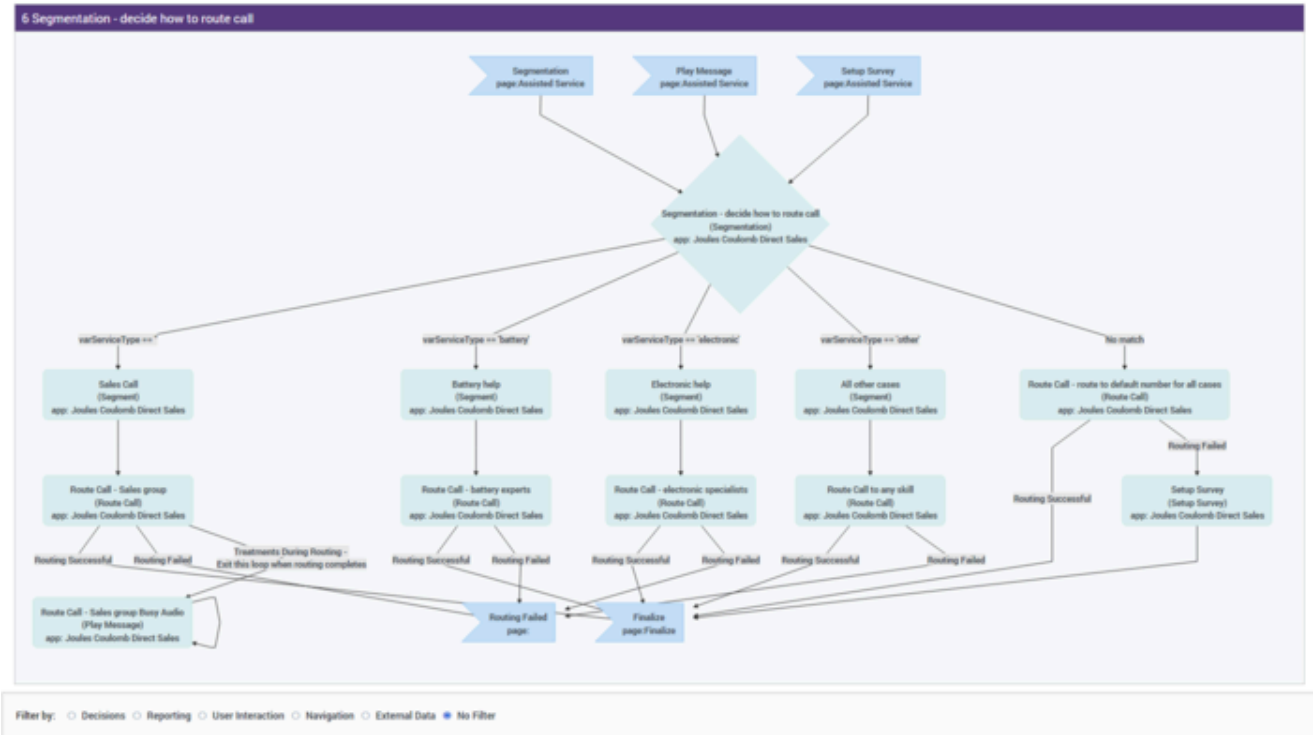
Viewing the application summary

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

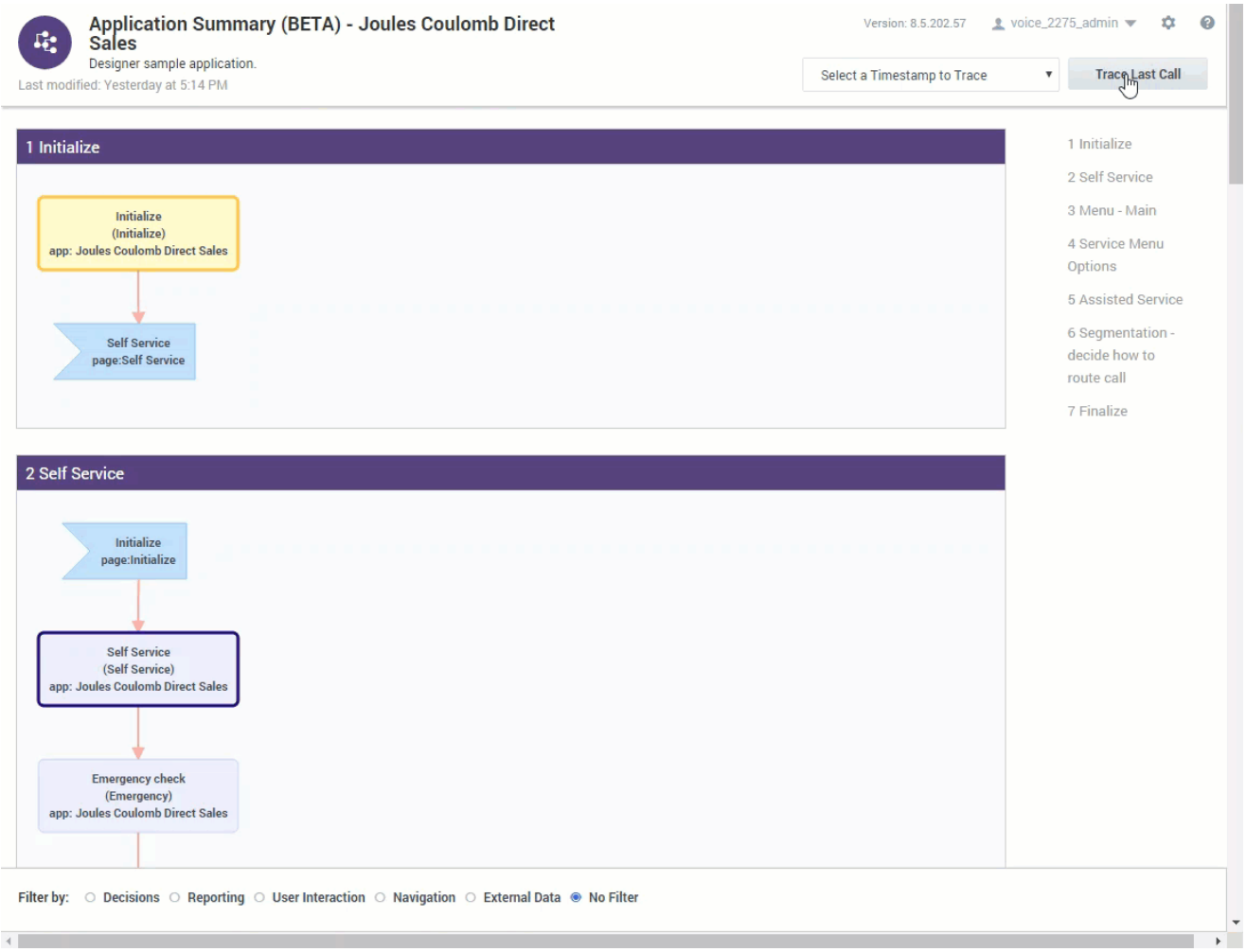
Use the **Filter by** options to focus on specific details. You can choose to filter the diagram by **Decisions**, **Reporting**, **User Interaction**, **Navigation**, or **External Data**.

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:



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.