Designer User's Guide

Genesys Multicloud CX Email

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Contents

- Administrator

Designer includes a digital application package that contains everything you need to get started with the Genesys Multicloud CX Email solution.

Related documentation:
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Introduction

Designer includes a pre-built digital application package that integrates Designer interaction handling and routing capabilities with the Genesys Multicloud CX Email functionality provided by Intelligent Workload Distribution (IWD) and Agent Workspace.

The package enables you to:

- Process incoming emails from Workload Manager and route them to the intended agents.
- Send reply emails from agents to customers (with support for Quality Assurance reviews).

For more information about Genesys Multicloud CX Email, see How email works.

How to get started

Review the package components

First, review this page to familiarize yourself with all of the package components. The package includes the following Designer objects and resources (each links to the section where they are described in more detail):

- Applications (digital type) for routing and sending emails. These applications are designed to be ready for you to publish and use.
- Modules to perform specific functions within the applications, such as checking the hours of operation, sending automated messages, and determining which routing services to use.
- Data Tables to manage the configuration settings that are specific to your operations. You'll use these to define email profiles, hours of operation, and routing criteria.
- A digital Message Collection you can use when sending auto-acknowledgement messages to customers.

Configure and publish the data tables

Next, you'll need to update the package data tables with the required configuration settings for your

site. Remember to publish the data tables after you are finished making your changes.

Publish the applications

Finally, publish the email applications.

> ### Important
> Some of the package contents in your deployment might include the term **IWD** in their names. For example, the **Send Email** application might appear as **IWD Send Email**. They are, however, the same resources as described on this page.

Applications

The package includes three pre-built digital applications that are designed to be ready-to-use. Rather than make changes to the applications directly, you can use the data tables and various business controls resources to customize the applications for your requirements. For example, you can use the data tables to create profiles that tell the application how to handle emails for certain categories, which business hours to check, or which skill expressions to target.

The package includes the following applications:

Engage Cloud Email

This is the main application that handles the processing and routing of incoming emails from Engage Cloud Email.

Here's a quick summary of the application flow:

- When an email arrives, the application checks which category the email belongs to and matches it to the appropriate Email Profile. If there is no matching profile, the default profile is used. (Emails that are determined to be automated replies are ignored.)

- The hours of operation are checked. If the contact center is closed, the email is held in a parking queue until the contact center opens. At that point, the application resumes processing the email.

- The email is routed according to its priority. If the last agent who serviced the customer is not available (or the Last Called Agent option is not enabled), the email is routed to a skill expression.

- The agent completes their handling of the email.

Each major event in the application flow adds a milestone to the reporting details that can be used to track the progress of each interaction.

Send Engage cloud Email

This application sends reply emails from agents to contacts using the Send Email block. It can also flag certain emails for supervisor review and route a percentage of those emails to a supervisor skill expression.

Here's a quick summary of the application flow:

- An agent composes a reply email using Agent Workspace. Depending on your setup, standard responses can be managed in eServices Manager or by using Standard Responses Management in Designer.
- The application checks if the email was reviewed by a supervisor. If yes, or it does not require a supervisor review, it sends the email to the recipient.
- If a certain percentage of random emails are to be sent to a supervisor for review, the application routes these to the target supervisor skill expression.

Send Engage cloud Email v2

This application shares the same basic functionality as the **Send Engage cloud Email** application, but can also perform additional handling when additional Quality Assurance (QA) reviews for email are required. For more information about email QA reviews, see Email Quality Assurance.

Here's a quick summary of the application flow:

- An agent composes and sends a reply email using Agent Workspace. Depending on your setup, standard responses can be managed in eServices Manager or by using Standard Responses Management in Designer.
- The application checks if the email was reviewed for QA and if the disposition was accepted. If yes, or the email does not require a QA review, it sends the email to the recipient. If the disposition was rejected by the reviewer, the email is sent back to the agent so that they can make the required changes.
- When the agent makes the required changes and re-submits the email, the application directs it to the original QA reviewer for their review and approval.
- If the email is approved, the application sends it to the recipient.
- If a certain percentage of random emails are to be sent to a supervisor for review, the application routes these to the target supervisor skill expression.

> ### Tip
> If you do need to make changes to an application flow, it is recommended that you clone the application. This creates a new virtual application that you can then modify as desired, while leaving the original application unchanged.

Modules

The modules are smaller chunks of application code that perform specific common functions, such as looking up information in data tables to obtain configuration settings. The Engage cloud Email package contains modules that check for hours of operation, send automated messages, and determine which email routing service to use.

The package includes the following modules:

Email HOOPS Check

This module checks the Email HOOPS Services data table for the Hours of Operation, such as Business Hours, Emergency Flags, and Special Days. If the contact center is closed, a Route Digital block parks the interaction until business hours resume. At that point, the parked interaction is processed and given a higher priority.

Email Send Automated Message

This module uses an Automated Message Block to send an auto-acknowledgement message to customers confirming that their email was received. The Email message collection contains messages you can use for this purpose.

Email Routing

This module checks the Email Routing data table to determine how the interaction is to be routed.

Data Tables

The data tables included with the package provide the configuration settings that the modules reference while performing their various functions. You can use the data tables to control how emails are handled by creating profiles that each have their own customized settings.

> ### Tip
> **Remember!** If you make changes to a data table, you must publish it for the changes to take effect. If you need more information about working with data tables, see Editing a data table.

The package includes the following data tables:

Email Profiles

Each row in this data table is a *profile* that controls how the application handles an email. You can think of a profile as being like a virtual application that can be customized to handle emails in a

specific way. For example, you could set up a profile for a particular line-of-business or segment that aligns with the categories defined in Workload Manager.

The profile ID is initially set to **default**, but can be changed if you define a new profile. If an email does not have a category, or there is no corresponding profile found, the default profile is used.

Display Name	Column ID	Description
Profile ID** (primary key)	profile_id	A unique ID that the system automatically assigns to the profile.
Profile Name	profile_name	You can assign a unique name to the profile so that it appears as a virtual application for reporting purposes. This enables you to differentiate it from any other profiles or instances of the application that are running.
Profile Description	profile_description	If desired, you can provide a description for the profile. For example, you might associate this profile with a particular line of business or customer segment.
HOOPS Service	hoops_service_id	The ID of the HOOPS Service defined for this profile in the Email HOOPS Service data table.
Routing Service	routing_service_id	The ID of the Routing Service defined for this profile in the Email Routing data table.

Email HOOPS Service

This data table is where you'll specify the Email HOOPS (Hours of Operations) service definitions. Each service can contain one of each type of Business Controls object, i.e. Business Hours, Emergency Flags, or Special Days.

Display Name	Column ID	Description
HOOPS Service ID ** (primary key)	hoops_service_id	A unique ID that the system assigns to this service.
Open Hours	business_hours	Specify the Business Hours object to use for this service.
Holidays	special_days	Specify the Special Days object to use for this service.

Routing Service

This data table is where you'll configure the settings for routing services. You can define multiple routing attempts, and each attempt can route to a different target.

> **Important**
>
> Currently, only skill expressions are supported as routing targets.

Display Name	Column ID	Description
Routing Service** (primary key)	routing_service_id	You can enter a unique name for the routing service. **Note**: Multiple attempts will use the same routing service if the attempts are related.
Routing Attempt** (primary key)	routing_attempt	Specify how many routing attempts are to be made. Attempts are made in increasing order.
Skill Expression	routing_skill	Specify the target skill expression to be used for routing.
Last Agent Routing	last_agent_routing	(Boolean) If the **Last Called Agent** option is enabled, the email is routed to the agent that last serviced the customer. Otherwise, the email is routed to the specified skill expression.
Supervisor Review	supervisor_review	(Boolean) If enabled, the email is considered for supervisor review.
Review Percent	review_percent	The percentage of emails considered for supervisor review that will be routed to the specified supervisor skill expression.
Supervisor Skill Expression	supervisor_skill	Specify the target supervisor skill expression to use for routing.
Routing Timeout	routing_timeout	Specify the timeout for routing attempts.

Message Collection

The package includes the following Message Collection:

Email

The **Email** message collection contains messages that can be used for sending auto-acknowledgment emails with the Automated Message Block. You can access this collection from the Digital Resources page.

Known issues and limitations

The following issues are known to affect certain deployments and will be addressed in future releases of Designer:

- Quality Assurance reviewers are not able to accept or reject emails sent to them for review.

- Emails that should go back to an original reviewer for a follow-up review are not reaching the intended target.