

Publish

Publishing the changes is a two step process :

- Save the new configuration set
- Publish the configuration set

Save the configuration set

All the changes made, for example : banners created, updated an opportunity, new canned responses created etc , all are listed under Publish -> Configuration. The already published versions appear on the top and changes yet to be saved will be listed below. You can select all the changes listed or a subset of them you wish to publish and click on the **Create** button.

Warning

This list contains changes made by all users in the account. Please make sure you only select the changes made by yourself or have been authorised to publish others.

The screenshot shows the 'Publish' section of the Configuration page. On the left is a navigation sidebar with options like Dashboard, Desktop, Statistics, Case browser, Monitor, Calendar, Analyze, Engage, Configure, Publish, Account, and Plugins. The main content area is titled 'Configuration' and has sub-sections for 'Publish' and 'History'. A note states: 'NOTE: Creating a new version of the configuration set will NOT automatically publish the new version live'. Below this, there are two rows of configuration data:

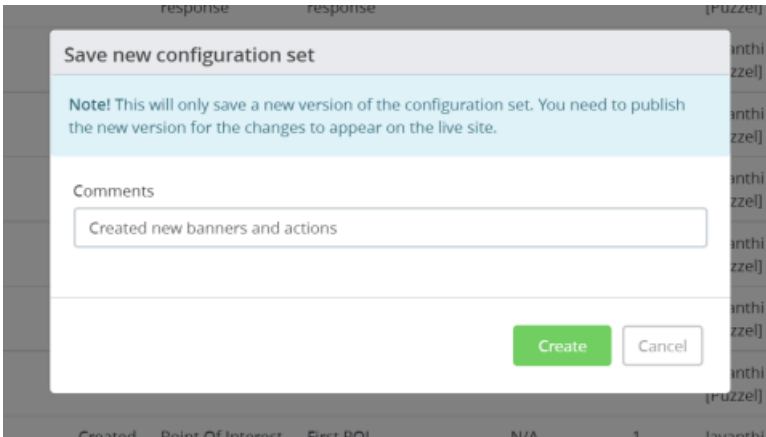
Newest version:	v.508	Friday Apr 1 12:53 - 2022	"new ones"	Jay [Puzzel]
Published version:	v.508	Friday Apr 1 12:53 - 2022	"new ones"	Jay [Puzzel]

Below this is a table titled 'Changes not saved in set' with columns: Include, Status, Type, Name, Saved in v.508, To Save, Last Modified By, and Last Modified. The table contains six rows of configuration items:

Include	Status	Type	Name	Saved in v.508	To Save	Last Modified By	Last Modified
<input checked="" type="checkbox"/>	Created	Banner	Booked meetings - demos	N/A	6	Jay [Puzzel]	Wednesday Apr 6 13:38 - 2022
<input checked="" type="checkbox"/>	Created	Group	Booked Meeting - Demos	N/A	1	Jay [Puzzel]	Tuesday Apr 5 14:40 - 2022
<input checked="" type="checkbox"/>	Created	Group	Booked Meeting - Demos	N/A	0	Jay [Puzzel]	Tuesday Apr 5 14:39 - 2022
<input checked="" type="checkbox"/>	Created	Canned response	Trial	N/A	0	Jay [Puzzel]	Wednesday Mar 23 11:03 - 2022
<input checked="" type="checkbox"/>	Created	Action	Trial	N/A	0	Jay [Puzzel]	Wednesday Mar 23 10:59 - 2022
<input checked="" type="checkbox"/>	Created	Theme	Trial	N/A	0	Jay [Puzzel]	Tuesday Mar 22 15:26 - 2022

At the bottom of the table is a green 'Create' button.

You will now see a **Save new configuration set** window popup. Enter the comments/description about the changes being made and press **Create**.



A new version of the configuration set will be created as shown in the image below.

Create new configuration set

NOTE: Creating a new version of the configuration set will NOT automatically publish the new version live

Newest version:	v.509	Thursday Apr 7 10:56 - 2022	"Created new banners and actions"	Jayanthi Kumar [Puzzel]
Published version:	v.508	Friday Apr 1 12:53 - 2022	"new ones"	Jayanthi Kumar [Puzzel]

Changes not saved in set

<input type="checkbox"/> Include	Status	Type	Name	Saved in v.509	To Save	Last Modified By	Last Modified
-	-	-	-	-	-	-	-

Note

Creating the configuration set will not automatically publish the changes on your website. You will have to publish the configuration as explained in the next section.

Publishing the configuration set

To publish the latest changes from the configuration set, go to Publish -> Publish. Here you will see the current version that is live and the newest version you want to publish. All the changes or difference between the live version and the latest are listed below. If you are happy with the changes, scroll down to the bottom of the list and click on **Publish** button.

Compare changes in newest version against published

Advanced

NOTE: Version 508 is currently live.

Newest version:	v.509	Thursday Apr 7 10:56 - 2022	"Created new banners and actions"	Jayanthi Kumar [Puzzel]
Published version:	v.508	Friday Apr 1 12:53 - 2022	"new ones"	Jayanthi Kumar [Puzzel]

Changes

Status	Type	Name	Saved in v.508	Saved in v.509
Created	Point Of Interest	First POI	N/A	1
Created	Group	Booked Meeting - Demos	N/A	1
Created	Group	Customer services	N/A	0
Created	Banner	Booked meetings -demos	N/A	6
Created	Action	Trial	N/A	0
Created	Customer case	Trial	N/A	0
Created	Group	Customer services	N/A	0
Created	Page category	New path	N/A	0
Created	Opportunity	Trial	N/A	2
Created	Action	Test action	N/A	2

Publish

You will see a **Publish configuration set** popup displaying the version that is about to go live. Confirm by clicking on the **Publish** button.

Publish configuration set

NOTE: You are about to publish version 509 of the configuration live.

Configuration set was created:
Thursday Apr 7 10:56 - 2022

Comments:
"Created new banners and actions"

Publish Cancel

If you now toggle back to Configuration option, you will see that the version is live.

Checking the historic changes

If you wish to look into the changes made in the previous versions, Go to Publish -> History and select the version number from the drop down menu. All the changes pertaining to the version will be listed.

Configuration Set history

500 ▾

👤 N/A

Tuesday Mar 1 15:54 - 2022

Comments

Added CR, etc etc

Status	Type	Name	Saved in v.500
Updated	Group	Sales	9
Created	Action	JC - video	N/A
Created	Closure	JC - Assisted completed	N/A
Created	Action	JC - blogpage	N/A
Created	Canned response	JC - canned respons	N/A
Created	Customer case	JC - sales case type	N/A
Created	Action panel	JC Proactive action panel	N/A
Updated	Banner	Dooreye	4
Updated	Template	JC - video	0