

## 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.

**Configuration**

Dashboard | Desktop | Statistics | Case browser | Monitor | Calendar | Analyze | Engage | Configure | **Publish** | Account | Plugins

**Create new configuration set**

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

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

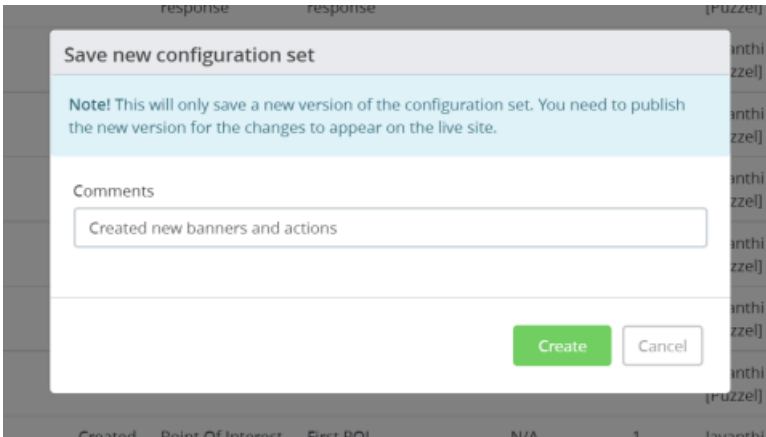
**Changes not saved in set**

| <input checked="" type="checkbox"/> | 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       | Jayanthi Kumar [Puzzel] | Wednesday Apr 6 13:38 - 2022  |
| <input checked="" type="checkbox"/> |         | Created | Group           | Booked Meeting - Demos  | N/A            | 1       | Jayanthi Kumar [Puzzel] | Tuesday Apr 5 14:40 - 2022    |
| <input checked="" type="checkbox"/> |         | Created | Group           | Booked Meeting - Demos  | N/A            | 0       | Jayanthi Kumar [Puzzel] | Tuesday Apr 5 14:39 - 2022    |
| <input checked="" type="checkbox"/> |         | Created | Canned response | Trial                   | N/A            | 0       | Jayanthi Kumar [Puzzel] | Wednesday Mar 23 11:03 - 2022 |
| <input checked="" type="checkbox"/> |         | Created | Action          | Trial                   | N/A            | 0       | Jayanthi Kumar [Puzzel] | Wednesday Mar 23 10:59 - 2022 |
| <input checked="" type="checkbox"/> |         | Created | Theme           | Trial                   | N/A            | 0       | Jayanthi Kumar [Puzzel] | Tuesday Mar 22 15:26 - 2022   |

**Create**

Jayanthi Kumar [Puzzel] @Partner Template

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 |
|----------------------------------|--------|------|------|----------------|---------|------------------|---------------|
| -                                | -      | -    | -    | -              | -       | -                | -             |

Create

### 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              |