

# Call Flow Components & Basics

“ **Module 3 Study Guide** | Source: Lecture + Verified against Genesys Cloud Resource Center (2025–2026)

## 1. What Is a Call Flow?

A **call flow** is a structured, visual representation of the sequence of events and actions that occur within a telephony or contact center system when handling incoming or outgoing calls.

- Determines **how** calls are handled, processed, and routed
- Ensures efficient operations and high-quality customer experiences
- Replaces simple "call goes to a phone" routing with intelligent, rule-based logic
- Enables: schedule-based routing, self-service options, queue management, voicemail, and more

“ **Key Concept:** Architect matches incoming interactions to flows based on criteria like the phone number dialed, then routes based on time, calendar, and logic rules.

## 2. Call Flow Components

Call flow components are **pre-built, drag-and-drop elements** used in Genesys Cloud Architect to build call flow logic.

They are organized in the **Toolbox** (right-side panel) into expandable categories:

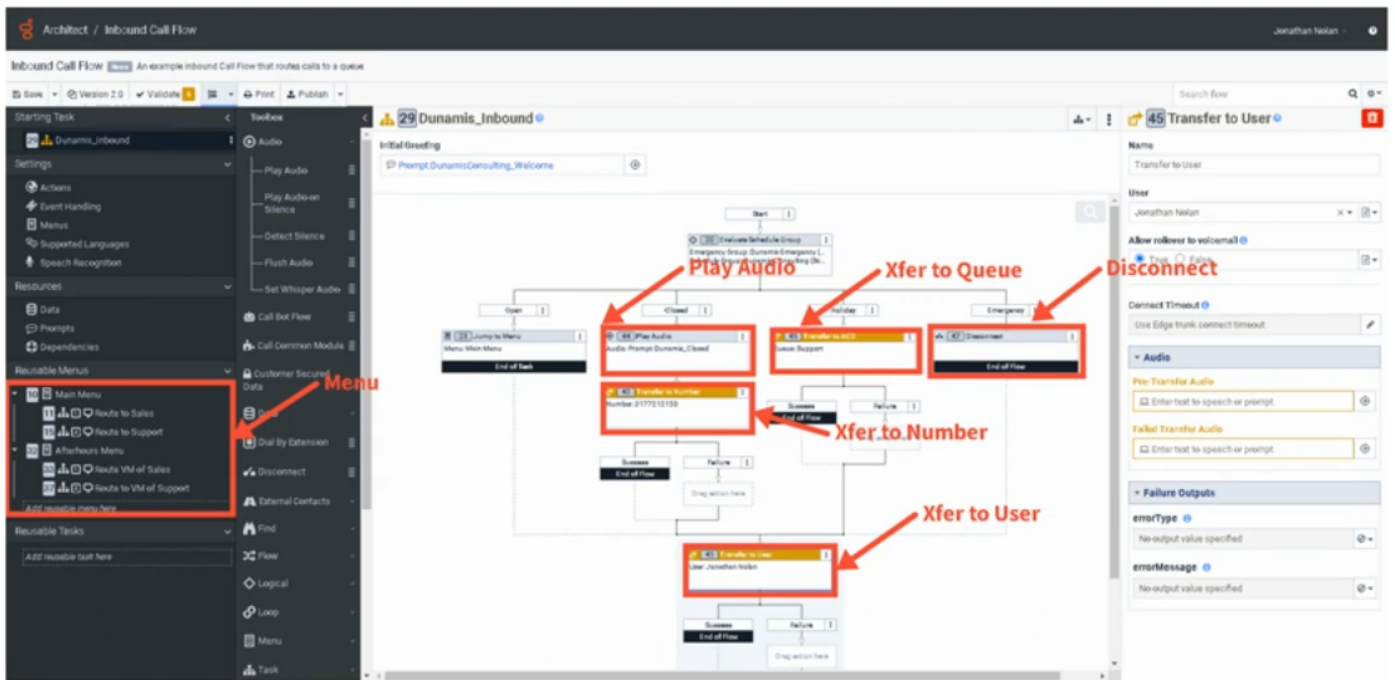
Category	Purpose
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Audio	Play prompts or TTS to callers
Bot	Integrate conversational AI bots
Common	Shared/reusable utility actions
Data	Retrieve or update data from APIs/tables
Disconnect	End the call or interaction
Find	Dynamically locate queues, users, schedules at runtime
Flow	Callbacks, screen pops, wrap-up codes
Logical	Decision, Switch, Schedule evaluation
Loops	Repeat sections of flow logic
Menus	IVR menus for caller DTMF or speech input
Tasks	Group logic into reusable routines
Transfer	Route callers to queues, agents, numbers, voicemail, other flows

“ **Note (Current as of 2026):** Action availability in the Toolbox varies by your Genesys Cloud **license plan**. The maximum number of actions Architect can run per flow invocation is **10,000** — exceeding this triggers error handling (default: disconnect).

## 3. Common Call Flow Components

These are the most frequently used components when building a basic call flow:



## ☐☐ Play Audio

- Plays a pre-recorded prompt or text-to-speech (TTS) message to the caller
- Output: a prompt file uploaded to Genesys Cloud, or a TTS string
- **Drag from Toolbox → Audio → Play Audio**

## ☐☐ Menu

- Creates an IVR menu where callers select options via DTMF keypress or speech
- Each menu choice has an output path for routing logic
- Can be **reusable** (stored and referenced multiple times in a flow)

## ➔ Transfer to ACD

- Sends the interaction to a **queue** (group of agents) for routing
- Available in: call flow menus, inbound flows, in-queue flows, chat, email, bot flows
- Supports: priority settings, preferred agents (up to 100), language skills, ACD skills
- Has **Success** and **Failure** output paths

“ ⚠ **Current Doc Note:** In **secure flows**, Genesys Cloud overrides the failure path and **disconnects the call** using blind transfers instead of consultation

transfers.

## ☐☐ Transfer to User

- Sends the call directly to a **specific agent**
- The selected user must have logged into Genesys Cloud at least once

## ☐☐ Transfer to Number

- Routes the call to an **external phone number** (e.g., after-hours vendor, third-party support)
- Flow author presets the number; callers cannot change it
- Architect tries to use the same trunk/site as the inbound call

## ☐☐ Transfer to Voicemail

- Sends caller directly to a **user's, queue's, or group's voicemail**
- Voicemail interactions retain the original call priority and route to the next available agent
- Maximum voicemail length: **3 minutes**
- Callers can: Send, Review, Re-record, or Cancel via DTMF or speech
- Voicemail must be enabled for the org; grayed-out users have no voicemail configured

## ☐ Disconnect

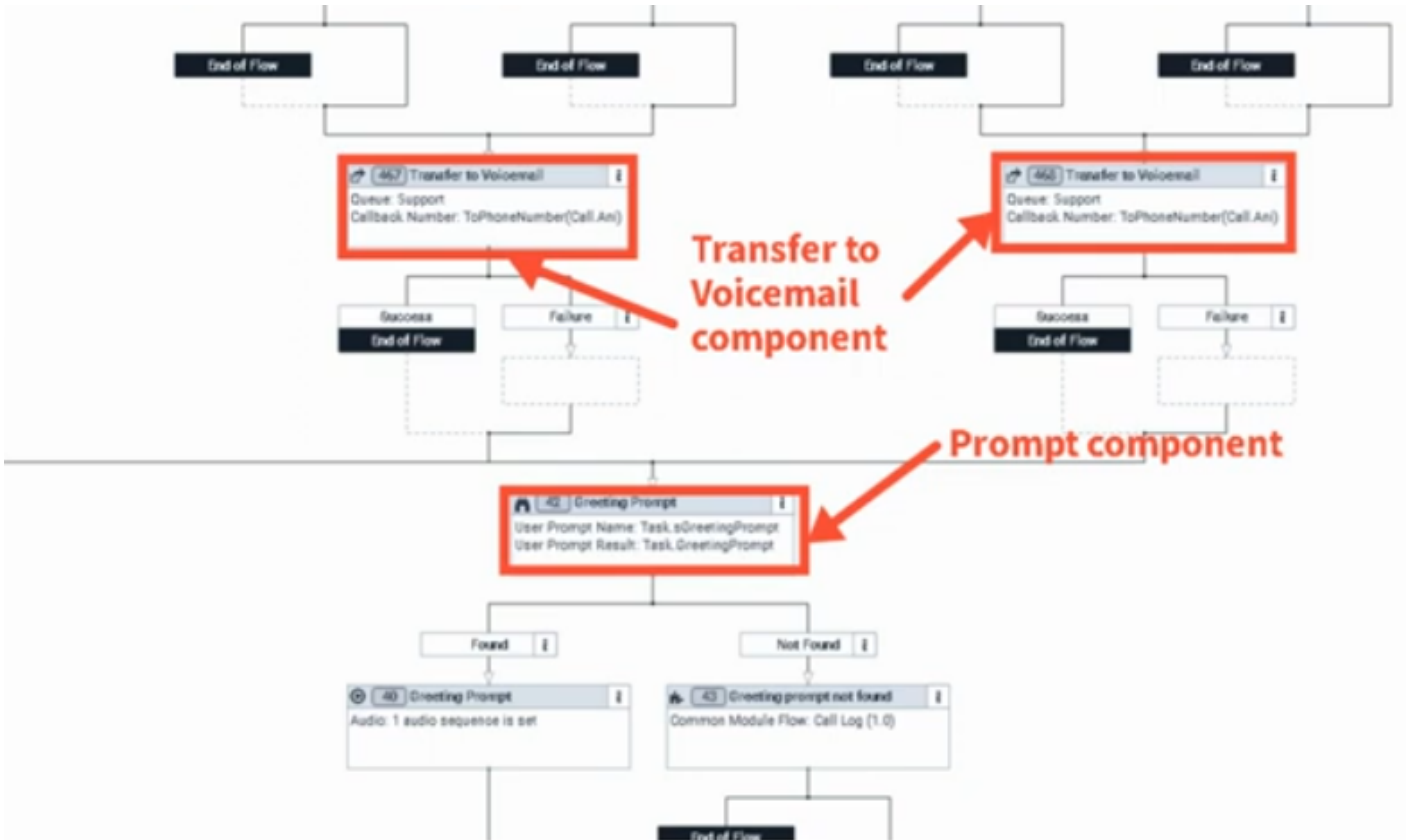
- Ends the call/interaction
- Used for: emergency closures, no-routing scenarios, end of flow logic

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# 4. Connecting Components

## How to Connect

- **Click and drag** components from the Toolbox onto the canvas
- **Reposition** by clicking and dragging to a new location
- **Right-click an arrowhead** on a component to select the next step from a context menu



## Component Outputs

Each component has one or more **output circles** on its right side representing possible outcomes:

Component	Output Example
Play Audio	TTS string or uploaded prompt file
Transfer to ACD	Queue name
Transfer to Number	External phone number
Menu	One output path per DTMF key or speech option
Decision	True / False paths

## Connection Properties

- Some components have **connection properties** (configured in the Properties Panel)
- Others (like Play Audio) have no connection properties — just an output
- **Properties Panel** shows on the right when a component is selected

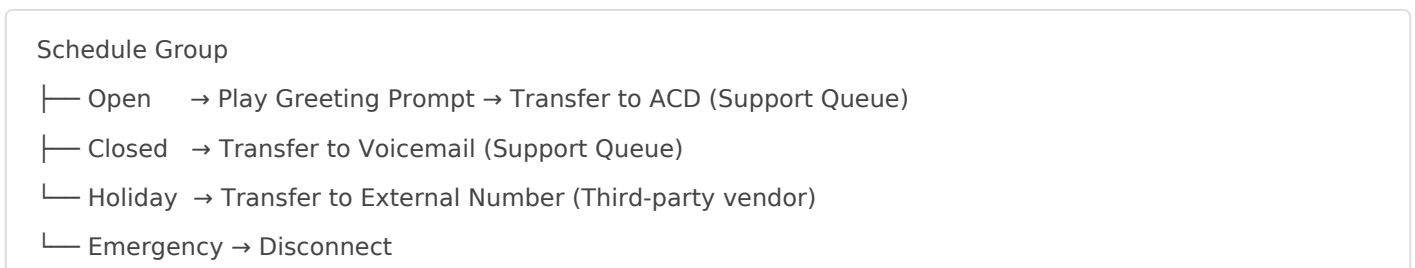
## Building the Flow

1. Drag a component to the canvas
2. Configure it in the Properties Panel
3. Connect its output arrow(s) to the next component
4. Continue until the flow ends with a Disconnect or Transfer
5. Repeat as needed

## 5. Schedule-Based Routing

### Example

A common pattern using the **Evaluate Schedule** or **Evaluate Schedule Group** action:



“□ Each branch is a separate output path from the schedule component, connecting to different actions.

## 6. Best Practices for Designing Call Flows

Practice	Why It Matters
<b>Keep it simple</b>	Easier to troubleshoot, maintain, and hand off
<b>Use Reusable Tasks</b>	Isolate logic (schedule checks, data actions) for independent editing
<b>Use Reusable Menus</b>	Avoid duplicating menus used in multiple places
<b>Use meaningful names</b>	Allows quick review without drilling into every component
<b>Test before deploying</b>	Use Architect's built-in Debug Tool before go-live

Practice	Why It Matters
<b>Consolidate Update Data actions</b>	Reduces flow size — multiple updates in one action vs. many single-update actions
<b>Avoid duplicating Data Actions</b>	Call Data Action, Create Callback, and Set Screen Pop are resource-heavy

“ **Current Doc Addition (2026):** Genesys now includes a **Flow Size indicator** under *Insights & Optimizations* to help you track resource usage and optimize before publishing. Common module flows have a **lower size limit** than other flow types.

## 7. Key UI Components (Canvas)

UI Element	Purpose
<b>Toolbox</b>	Source of all drag-and-drop actions
<b>Canvas</b>	Visual workspace where flow is built
<b>Properties Panel</b>	Configure selected component's settings
<b>Output Circles</b>	Connection points on right side of each component
<b>Arrows/Connections</b>	Visual paths between components
<b>Debug Tool</b>	Test flow internally without a real phone
<b>Validation</b>	Check for errors before publishing
<b>Flow Insights</b>	View execution frequency overlay (read-only mode, up to 7 days of history)

## 8. Additional Current Features

“ These are confirmed-current Genesys Cloud Architect features you may encounter:

- **Flow Insights** — Visual overlay showing how often each component executes; helps identify drop-off points and optimization opportunities

- **Flow Size Indicator** — Shows % of maximum flow size used; warns when approaching limits
- **AI-Powered Slots** — Bot flows now support special characters, customizable continuation prompts, and multi-turn test widget conversations
- **Virtual Agent Performance Dashboard** — Track bot containment rates, transfers, and ROI
- **Preferred Agents (Transfer to ACD)** — Supports up to 100 preferred agents with scoring

## 9. Quick Reference Cheat Sheet

I want to...	Use this component
Play a message to the caller	Play Audio
Let callers press 1 for Sales	Menu
Route to a group of agents	Transfer to ACD
Route to a specific agent	Transfer to User
Route to an outside number	Transfer to Number
Send to voicemail	Transfer to Voicemail
Check if office is open	Evaluate Schedule / Evaluate Schedule Group
Make a True/False decision	Decision
Look up data from an API	Call Data Action
End the call	Disconnect
Reuse logic across the flow	Reusable Task / Call Task

*Last verified against [Genesys Cloud Resource Center](#) — January/February 2026*

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