**ASSA Abloy – 13/09/2021 Latest Situation**

**General Items:**

1. Agent/Admin Manuals – updates including but not limited to:
   * Warm Transfer
   * CRM Unknown Callers look up
2. Data Dump which is part of phase 2: AA to confirm what time they want the data posted.

**Phone Module:**

1. **#51** - Transfer to conference another agent into call with customer ETA 16th July – due Wed 28/07?? **Conference Could be this Friday – 06/08 – Due Wed 1/9 as per update 30/8**
2. **10/09 #172** - Log in / Away misalignment between 3CX and Omni - Jacinta to continue testing. WebClient has status of “Away” so when logging into queue in Omni it’s not sending calls as her status of 3CX of “Away” is overriding. Jacinta had not set her status to “Away” so will monitor from having herself as “Available” on WebClient from 1.15pm and see if the issue recurs.
   * **13/09 – expected fix Monday night**
   * 13/09 - Jacinta found a “pretend” user extension for testing that has never had webclient or softphone and status was “Away” as well.
3. **NEW 13/09** – Mr VoIP required to connect the other 2 x 3CX systems so that agents can look up any staff member across ANZ. Please deploy ASAP.

**E-mail Module:**

1. **NEW 13/09 #174** - An agent can only add a signature in plain text. Previously, they could amend a default or add a new signature.
   1. If possible, the requirement would be to amend the Default - but only as a "Save As New"... ie, the Agent can add their name to the default signature but keep majority the same. (This is what we could do previously).
2. **NEW 13/09 #175** - The "Close - Send Notification" option is not sending the notification. Ticket 1616 has not sent.

**Chat Module:**

1. **10/09 #173** - Chat Department: updating the Department for individual widgets is updating ALL widgets.
   1. Mani aware and team already working on this – expected update mid next week.

**Phase 2 part 1 as shown to AA team 01/09:**

**E-mail pooling/ticket assignment – Mani delivered demo Wednesday 1st/Jacinta testing**

1. **09/09 #169** - When I reassign a ticket to another Queue, I am not allocated a new ticket (i.e. to take me back to my Max = 5). Jacinta has recorded a video and it’s in the box.
   1. As demonstrated on meeting 10/09 with Mani
2. **09/09 #169A** - A reassigned ticket is not allocated an agent automatically, nor is it shown in the "Queue Tickets" unassigned view. Refer above video as well.
   1. As demonstrated on meeting 10/09 with Mani
3. **09/09 #165** – Mani’s update from 08/09 was: No, It is based on Agents, not Queue (We can limit the ticket for Agents not for Queue).
   1. From Jacinta’s testing 09/09: this is failed based on the above answer: see screen shot, where agent is being assigned the value per queue. Our preference is as described - per agent. As assuming this allows a better oldest to newest allocation when an agent is present in more than one queue.
   2. As discussed with Mani on the call 10/09, currently is per queue and Jacinta will do further testing with it later today. No action at present.

**Wallboard/Dashboard adjusted for individual – Mani delivered demo Wednesday 1st**

**E-mail auto reply based on queue - Mani delivered demo Wednesday 1st**

**Future functionality updates shown to ASSA Abloy on dates noted as being worked on but will be available when completed and no time frames:**

* 25/08/2021 - Mani showed the Teams integration and apps – 47 users will get free access app would cost for other AA staff
* 25/08/2021 - SSO – chargeable component, only Omni user would be able to use Teams with SSO – long way of development ahead
* 01/09/2021 - Talked about new functionality to come of being able to merge 2 tickets and assign to same agent etc.

**Outside Scope identified during project:**

1. Last 5 CRM interactions to pull through when call comes in (#7 on AA spreadsheet) – **put on hold for phase 3**
2. Agent availability social channels – ie available to take chats but not e-mail. (#56 on AA spreadsheet)
3. Chat - they require the ability to filter (see #’s of chats in each status) + select multiple filters similar to e-mail. (#32 on AA Spreadsheet).
4. Chats are not assigned to an agent, want a way to claim/distribute. Also ability to transfer to a more suitable agent. (#63 on AA spreadsheet)
5. E-mail reports: I cannot seem to locate reports related to emails. (#57 on AA spreadsheet)
   * For example
     + Queue Stats
       - Time in Queue before Assigned
       - Average Time taken to close
       - Count Reassigned
     + Agent Stats:
       - Time taken to close
       - Time taken to 1st Response
       - Count Closed in a period
       - Count reassigned
6. Chat Reports: cannot seem to locate reports related to relating to Chat and other Messaging (#58 on AA spreadsheet).
   * For example
     + Queue Stats
       - Time in Queue before Assigned
       - Average Time taken to close
       - Count Reassigned
     + Agent Stats:
       - Time taken to close
       - Time taken to 1st Response
       - Count Closed in a period
       - Count reassigned
7. In regard to User Story 45 - As a Ops Lead, I want to schedule reports to execute automatically, so reports are emailed to appropriate stakeholders. Unable to see functionality that supports automated reports? (#65 on AA spreadsheet).