2/24/23

**Use Cases by Department for OmniExpress gadget**

**Installed Sales/Service** (~6-8 agents**)**

* The main difference from the way the gadget flow works today would be that the Phone Call (Activity record) in Dynamics would associate with a Case. Right now, it associates with a Contact. As I’m writing this however, I am wondering can it do both?
* When the call comes in, the gadget will still perform a lookup on a Contact record, but then present a list of Cases associated with the Contact so that the agent may select which Case the Contact is calling about.
* All other fields pertaining to the Contact may remain the same, continuing the effort to update, maintain and complete Contact records with as much useful information as possible.
* Phone Call specific fields **Quick Notes**, **Call Reason** **and Post Contact Action** will be updated with new values specific to a Case. Disposition Code may remain the same.

**Special Order Receiving** (~4 agents)

* Functionally, this would work very similar to today’s gadget, w/ the exception that we almost always will know why the customer is calling i.e. to check the status of an order or to arrange delivery. What we would need to determine on our side is where we want to record the phone call; against the Account/Contact or the Order?
* Again, **Quick Notes**, **Call Reason** **and Post Contact Action** would be updated with new values tailored specifically to their interactions.

**Human Resources** (~4 agents)

* This has not been scoped internally, nor is the HR Dept. engaged with D365 currently. An initial thought I had was the potential for OmniExpress to integrate with another 3rd party database, in this case, ADP. The idea being that agents would be handling phone calls from employees on a variety of topics, ranging from benefits, payroll, as well as workman’s compensation claims.
* If D365 *were* to be utilized they would be engaging with a highly restrictive subset of Contacts, limited to Riverhead Building Supply employees. Security would need to be built around these Contacts in order to prevent them from being viewed by the rest of the Organization.
* **Quick Notes**, **Call Reason** **and Post Contact Action** would be updated with new values specific to the needs of the dept.