

# Contact Management Service

## Version 1 Release Notes

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### 1. Overview

The new version of CMS went live on 26<sup>th</sup> October 2022, the first version included two Contact types:

1. Shipper raised MNumber creation (MNC) process
2. Supplier raised theft of gas (SUT) process

Please note, while the SUT process functionality has been fully built and developed in the system, it is not currently available for use as we await an industry decision for the go live date.

### 2. Available functionality

The following functionality is available in the live service:

- Log single MNC contacts
- Instant validations, rejection, and acceptance messages
- PAF address look up and auto-population of detail in logging form
- Organisation and personal work queues
- Assigning, reassigning, and unassigning of contacts within work queues
- Assigning, reassigning, and unassigning of contacts within contact detail pages
- Contact referrals
- - Data Clarifications (DC) and responses
- - Site Visit requestions (SV) and responses
- Full history of contacts and details visible within contact detail page
- Fully transparent contact statuses and visible descriptions
- Full audit history
- Third party visibility of contacts, i.e. retain visibility following referral and response
- Notifications – receiving and reviewing of resolved contact information
- Previously Submitted CPLeontacts (PSC) - challenge to resolution
- Quick search
- Advanced search (configurable)
- User management - Create/disable/enable/modify user accounts/details (LSO activities)

### 3. Available functionality requiring refinement

There are two items of functionality that are being refined and need a workaround, which are detailed below:

- Assigning Contacts to yourself from work queues
- Viewing the assignee username in the 'Assigned to' column in Organisation work queue

### Assigning Contacts to yourself from work queues

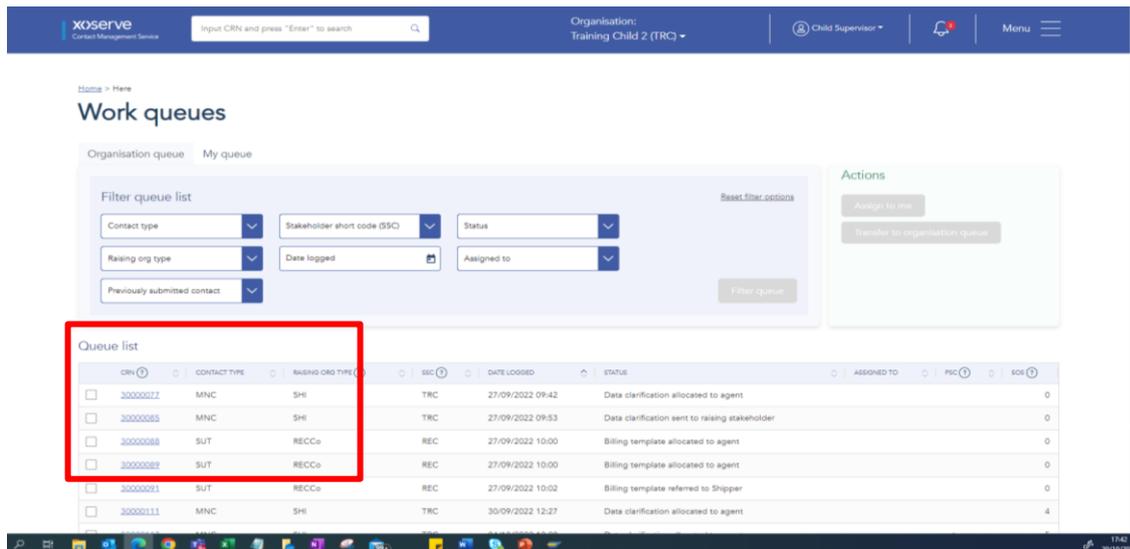
When in either the 'Organisation queue', or your own 'Work queue', the functionality to 'Assign to me' or 'Transfer to organisation queue' either one or multiple contacts requires a workaround.

When you select one or multiple contacts and select to either assign or transfer, the two action buttons will be greyed out (de-selecting the contacts makes the action buttons available again).

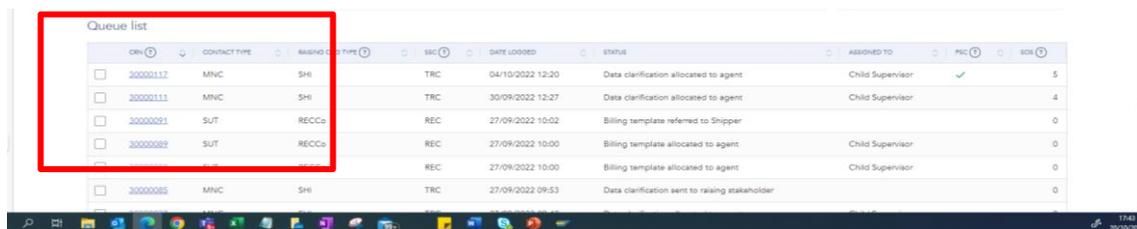
The screenshot shows the Xoserve Contact Management Service interface. The top navigation bar includes the Xoserve logo, a search bar, and the current organisation 'Training Child 2 (TRC)'. The main content area is titled 'Work queues' and has two tabs: 'Organisation queue' and 'My queue'. Below the tabs is a 'Filter queue list' section with several dropdown menus for 'Contact type', 'Stakeholder short code (SSC)', 'Status', 'Raising org type', 'Date logged', and 'Assigned to'. A 'Filter queue' button is located to the right of the filters. Below the filters is a 'Queue list' table with columns for 'CRN', 'CONTACT TYPE', 'RAISING ORG TYPE', 'SSC', 'DATE LOGGED', 'STATUS', 'ASSIGNED TO', 'PEC', and 'SOS'. The first three rows of the table are highlighted with a red box. To the right of the table is an 'Actions' panel, also highlighted with a red box, containing two buttons: 'Assign to me' and 'Transfer to organisation queue'.

CRN	CONTACT TYPE	RAISING ORG TYPE	SSC	DATE LOGGED	STATUS	ASSIGNED TO	PEC	SOS
30000027	MNC	SHI	TRC	27/09/2022 09:42	Data clarification allocated to agent			0
30000085	MNC	SHI	TRC	27/09/2022 09:53	Data clarification sent to raising stakeholder			0
30000088	SUT	RECCo	REC	27/09/2022 10:00	Billing template allocated to agent			0
30000090	SUT	RECCo	REC	27/09/2022 10:00	Billing template allocated to agent			0
30000091	SUT	RECCo	REC	27/09/2022 10:02	Billing template referred to Shipper			0

**Work around:** On opening either the 'Organisation queue', or your own 'Work queue', before selecting any contacts, sort the ordering of the contacts in the 'Queue list'. This can be done by clicking any of the column headers in the list, for example 'CRN'.



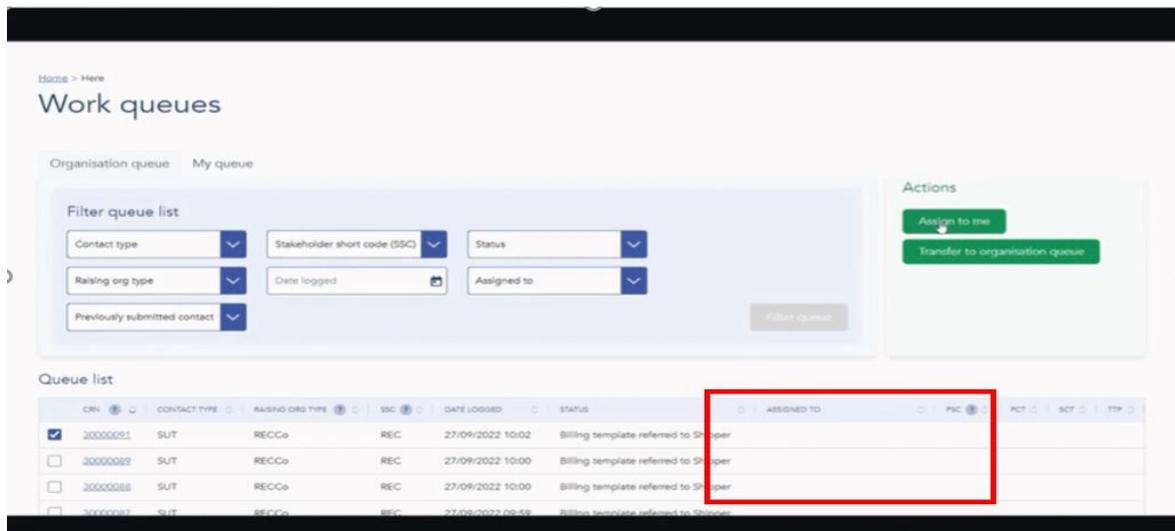
If there are multiple contacts in the list you will see the order of the contacts change. You can keep the ordering as is, or click the same column header again to return to the original order.



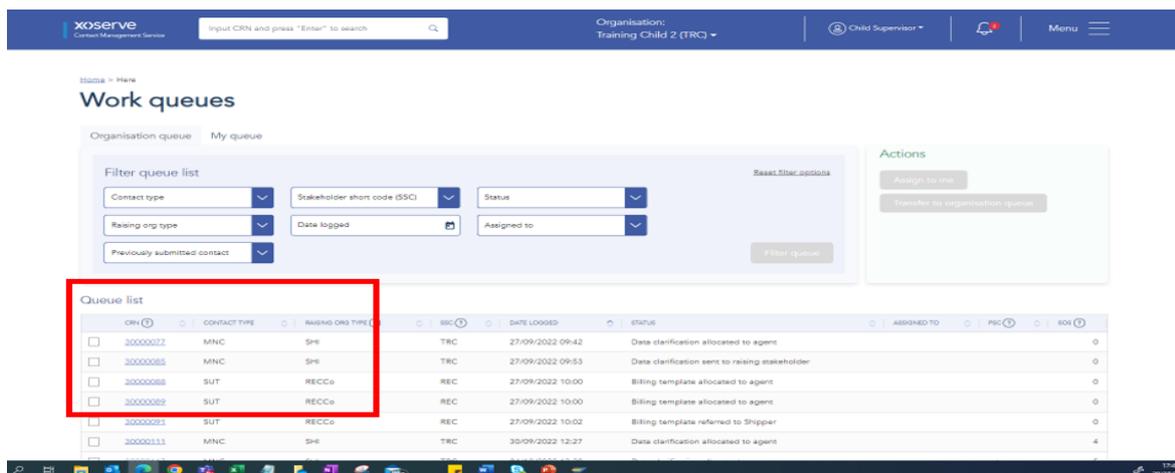
You will now be able to select the contact(s) you wish to assign and transfer, then click the appropriate button in the 'Actions' section, and the chosen activity will be successfully actioned.

## Viewing assignee username in the 'Assigned to' column of Organisation work queue

**What is happening:** On first accessing the Organisation work queue tab from another page, the list of contacts does not contain the assignee name.



**Work around:** On opening Organisation queue, sort the ordering of the contacts in the 'Queue list'. This can be done by clicking any of the column headers in the list, for example 'CRN'.



Once the order of contacts has been changed, the assignee username of any assigned contacts will now be visible in the 'Assigned to' column.

