## **Contact Management Service Version 1 Release Notes**

#### 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).

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Home > WC	Here Ork que	UES My queue								
Fi	ilter queue lis <sup>Contact type</sup>	t V	Stakeholder short code	SSC) V	Status	~	Reset filter options	Actions Assign to m Transfer to d	e organisation que	je
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Queu	ie list	CONTACT TVRS		A 1 555 (3)					A   850	A   850
	30000077	MNC	SHI	TRC	27/09/2022 09:42	Data clarification allocate	ed to agent	C   Association		0
	30000085	MNC	SHI	TRC	27/09/2022 09:53	Data clarification sent to	raising stakeholder			0
~	3000088	SUT	RECIP	REC	27/09/2022 10:00	Billing template allocate	d to agent			0
	20000000	e. 17		REC	27/09/2022 10:00	Billing template allocate	d 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'.

Contact Ma	anagement Service	Input CRN and p	oress "Enter" to search	Q		Organisation: Training Child 2 (TRC) <del>-</del>	8	Child Supervisor -	ل Menu	
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	30000077	MNC	SHI	TRC	27/09/2022 09:42	Data clarification allocate	d to agent			0
	30000085	MNC	SHI	TRC	27/09/2022 09:53	Data clarification sent to	aising stakeholder			0
	30000088	SUT	RECCo	REC	27/09/2022 10:00	Billing template allocated	i to agent			0
	30000089	SUT	RECCo	REC	27/09/2022 10:00	Billing template allocated	i to agent			0
	30000091	SUT	RECCo	REC	27/09/2022 10:02	Billing template referred	to Shipper			0

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.

		ORN () 🗘	CONTACT TYPE	RAISNO CO TYPE ()	85C ()	DATE LOGOED C	status o	ASSIGNED TO	0 MSC () 0 SOS ()	
		30000117	MNC	SHI	TRC	04/10/2022 12:20	Data clarification allocated to agent	Child Supervisor	~	5
		30000111	MNC	SHI	TRC	30/09/2022 12:27	Data clarification allocated to agent	Child Supervisor		4
		20000091	SUT	RECCo	REC	27/09/2022 10:02	Billing template referred to Shipper			0
		30000089	SUT	RECCo	REC	27/09/2022 10:00	Billing template allocated to agent	Child Supervisor		0
_	-				REC	27/09/2022 10:00	Billing template allocated to agent	Child Supervisor		0
		20000085	MNC	SHI	TRC	27/09/2022 09:53	Data clarification sent to raising stakeholder			0

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.

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								Actions	
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ĺ	Contact type	~	Stakeholder short or	ode (SSC) 🗸	Status	~		Transfer to or	ganisation queue
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	30000089	SUT	RECCo	REC	27/09/2022 10:00	Billing template referred to Sh	oper		
	20000088	SUT	RECCo	REC	27/09/2022 10:00	Billing template referred to Sh	oper		

**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'.

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	30000085	MNC	544	TRC	27/09/2022 09:53	Data clarification sent to	raising stakeholder			0
	20000088	SUT	RECCo	REC	27/09/2022 10:00	Billing template allocate	d to agent			0
	30000089	SUT	RECCo	REC	27/09/2022 10:00	Billing template allocate	d to agent			0
	20000091	SUT	RECCo	REC	27/09/2022 10:02	Billing template referred	to Shipper			0
	20000111	MNC	SHE	TRC	30/09/2022 12:27	Data clarification allocate	ed to agent			4
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Once the order of contacts has been changed, the assignee username of any assigned contacts will now be visible in the 'Assigned to' column.

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30000111	MNC	SH	TRC	30/09/2022 12:27	Data clarification allocated to agent	Child Supervisor	4
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30000069	SUT	RECCo	REC	27/09/2022 10:00	Billing template allocated to agent	Child Supervisor	0
30000088	SUT	RECCo	REC	27/09/2022 10:00	Billing template allocated to agent	Child Supervisor	0
30000065	MNC	5H	TRC	27/09/2022 09:53	Data clarification sent to raising stakeholder	-	