



Omni Reach – Release Note

Date: 15/10/2025

1. Introduction

The document communicates the new features and changes in OMNI Reach release.

2. About the Release

Changes made include:

2.1 Row Count Added to Daily Files Report

If we are able to get a row count from the file, it will be shown in the report as seen below.

Organizational Reporting

Chargeable Received Files

Today's File Uploads

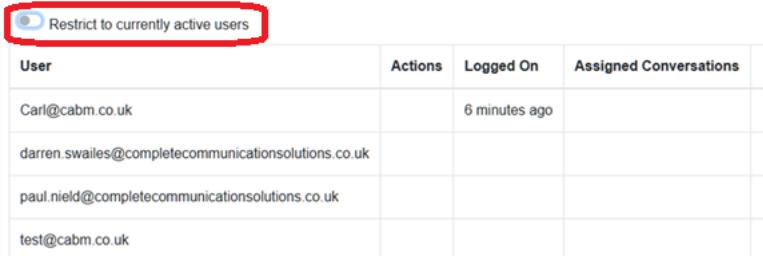
The list includes all files that have been uploaded including those that subsequently fail validation

Time	Type	Upload Type	Filename	Row Count	Status
11:09	Portal	Customer Data	6-Carl.xlsx	6	Processed
11:08	Portal	Customer Data	6-Carl.xlsx		Failed - Validation exception: A column must be provided for the customer reference, as "DebtID"

2.2 Team Manager User Management can be Restricted to Active Users Only

Turning on the switch will only show active users.

User Management

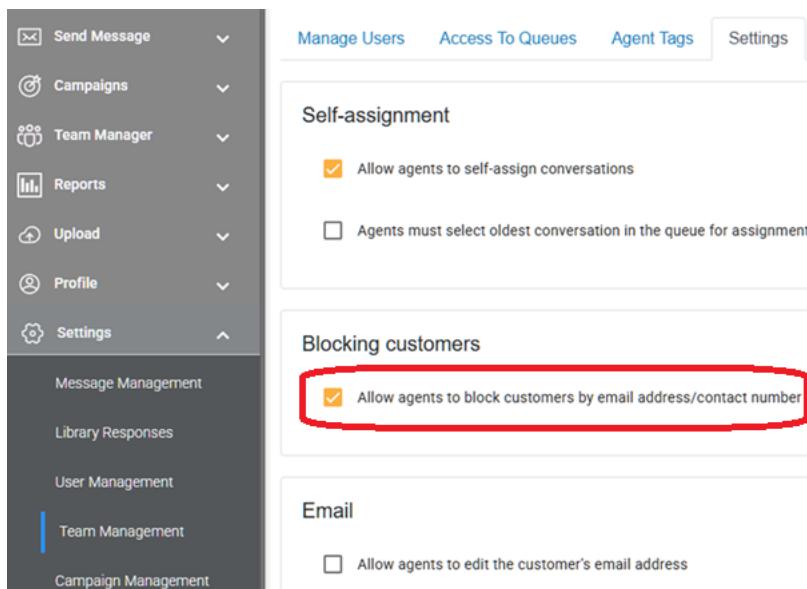


A screenshot of a user management table. The table has columns for User, Actions, Logged On, and Assigned Conversations. There are four rows of data: Carl@cabm.co.uk (logged on 6 minutes ago), darren.swailes@completecommunicationsolutions.co.uk, paul.nield@completecommunicationsolutions.co.uk, and test@cabm.co.uk. Above the table, a checkbox labeled 'Restrict to currently active users' is checked and highlighted with a red box.

User	Actions	Logged On	Assigned Conversations
Carl@cabm.co.uk		6 minutes ago	
darren.swailes@completecommunicationsolutions.co.uk			
paul.nield@completecommunicationsolutions.co.uk			
test@cabm.co.uk			

2.3 Can Disable the Block Customer Button

Turning off the option will prevent agents in this team from blocking customers.

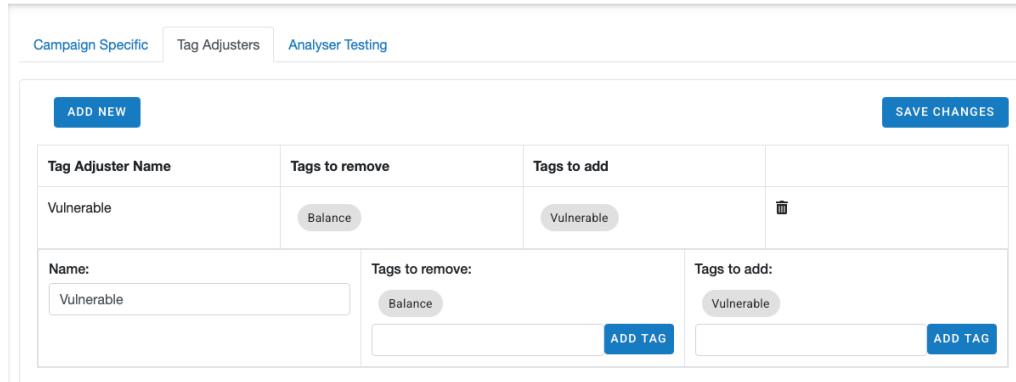


A screenshot of the 'Settings' page under 'Team Manager'. The left sidebar shows 'Send Message', 'Campaigns', 'Team Manager' (selected), 'Reports', 'Upload', 'Profile', and 'Settings'. The 'Settings' section includes 'Message Management', 'Library Responses', 'User Management', 'Team Management' (selected), and 'Campaign Management'. The main content area has tabs for 'Manage Users', 'Access To Queues', 'Agent Tags', and 'Settings'. The 'Settings' tab is active. It contains sections for 'Self-assignment' (with 'Allow agents to self-assign conversations' checked) and 'Blocking customers' (with 'Allow agents to block customers by email address/contact number' checked). The 'Email' section is also present.

2.4 Tag Processors can now Unassign Agents after Completing Processing

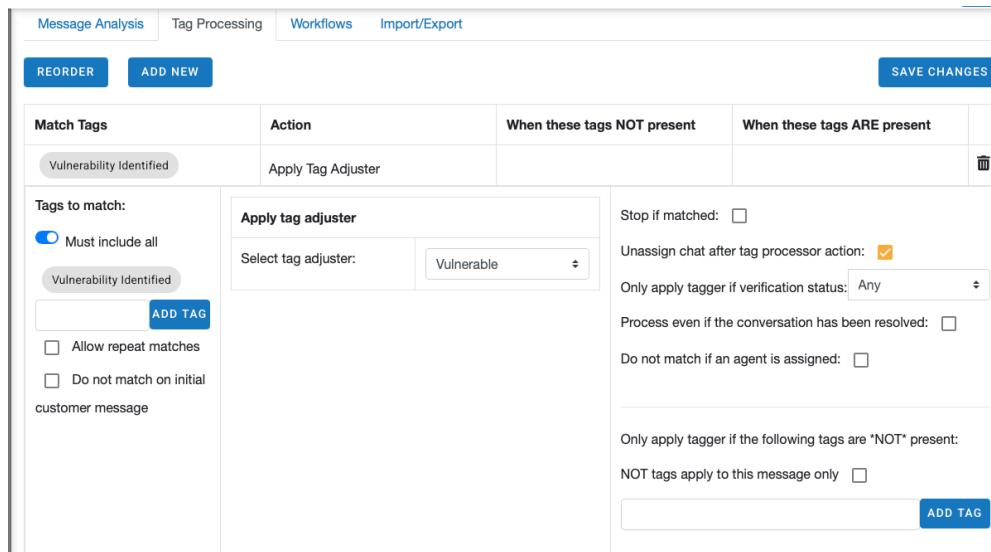
With this option set, if there is an agent assigned to the chat when the Tag Processor is finished it will unassign that agent.

An example of the use of this would be to create an agent tag (you can have a list of custom tags that an agent can add when assigned) where the action for that tag was to apply a tag adjuster. A custom tag “Vulnerability Identified” could be provided for the agent where the tag adjuster below was set as the action



The screenshot shows the 'Tag Adjusters' section of a software interface. At the top, there are tabs for 'Campaign Specific', 'Tag Adjusters', and 'Analyser Testing'. Below the tabs, there are buttons for 'ADD NEW' and 'SAVE CHANGES'. The main area contains a table with columns for 'Tag Adjuster Name', 'Tags to remove', and 'Tags to add'. A row is shown for 'Vulnerable', with 'Balance' in the 'Tags to remove' column and 'Vulnerable' in the 'Tags to add' column. Below this table, there are input fields for 'Name' (containing 'Vulnerable'), 'Tags to remove' (containing 'Balance'), and 'Tags to add' (containing 'Vulnerable'). Each input field has an 'ADD TAG' button to its right.

Here you can see that when the agent applies the custom tag of “Vulnerability Identified”, the conversation would be removed from the balance queue (since the Balance tag is being removed) and then tagged and moved to the vulnerable queue (since the Vulnerable tag is added) and the agent would then be automatically unassigned from that chat since that option is tick selected below



The screenshot shows the 'Tag Processing' section of a software interface. At the top, there are tabs for 'Message Analysis', 'Tag Processing', 'Workflows', and 'Import/Export'. Below the tabs, there are buttons for 'REORDER', 'ADD NEW', and 'SAVE CHANGES'. The main area contains a table with columns for 'Match Tags', 'Action', 'When these tags NOT present', and 'When these tags ARE present'. A row is shown for 'Vulnerability Identified' with 'Apply Tag Adjuster' in the 'Action' column. To the right of this table, there are several configuration options: 'Must include all' (radio button selected), 'Allow repeat matches' (checkbox), 'Do not match on initial customer message' (checkbox), 'Stop if matched' (checkbox), 'Unassign chat after tag processor action' (checkbox checked), 'Only apply tagger if verification status' (dropdown set to 'Any'), 'Process even if the conversation has been resolved' (checkbox), 'Do not match if an agent is assigned' (checkbox), 'Only apply tagger if the following tags are *NOT* present' (checkbox), and 'NOT tags apply to this message only' (checkbox). Each of these options has an 'ADD TAG' button to its right.

3. Known Bugs and Limitations

None