



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

☒ Restrict to currently active users

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.

Send Message

Campaigns

Team Manager

Reports

Upload

Profile

Settings

Message Management

Library Responses

User Management

Team Management

Campaign Management

Manage Users

Access To Queues

Agent Tags

Settings

Self-assignment

☒

Allow agents to self-assign conversations

☐

Agents must select oldest conversation in the queue for assignment

Blocking customers

☒

Allow agents to block customers by email address/contact number

Email

☐

Allow agents to edit the customer's email address

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' configuration page. At the top, there are tabs for 'Campaign Specific', 'Tag Adjusters', and 'Analyser Testing'. Below the tabs are 'ADD NEW' and 'SAVE CHANGES' buttons. The main area contains a table with columns: 'Tag Adjuster Name', 'Tags to remove', 'Tags to add', and an empty column. The first row shows 'Vulnerable' as the tag adjuster name, 'Balance' as the tag to remove, and 'Vulnerable' as the tag to add. Below the table, there are input fields for 'Name:' (containing 'Vulnerable'), 'Tags to remove:' (with a 'Balance' tag), and 'Tags to add:' (with a 'Vulnerable' tag). Each of these input areas has an 'ADD TAG' button.

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 Processor' configuration page. At the top, there are tabs for 'Message Analysis', 'Tag Processing', 'Workflows', and 'Import/Export'. Below the tabs are 'REORDER', 'ADD NEW', and 'SAVE CHANGES' buttons. The main area contains a table with columns: 'Match Tags', 'Action', 'When these tags NOT present', 'When these tags ARE present', and an empty column. The first row shows 'Vulnerability Identified' as the match tag, 'Apply Tag Adjuster' as the action, and empty fields for the other two columns. Below the table, there are several configuration options: 'Tags to match:' with a toggle for 'Must include all' (checked) and a list of tags including 'Vulnerability Identified'; 'Apply tag adjuster' with a dropdown for 'Select tag adjuster:' set to 'Vulnerable'; 'Stop if matched:' with a checkbox (unchecked); 'Unassign chat after tag processor action:' with a checkbox (checked); 'Only apply tagger if verification status:' with a dropdown set to 'Any'; 'Process even if the conversation has been resolved:' with a checkbox (unchecked); 'Do not match if an agent is assigned:' with a checkbox (unchecked); 'Only apply tagger if the following tags are "NOT" present:' with a text input field; and 'NOT tags apply to this message only' with a checkbox (unchecked). There is also an 'ADD TAG' button at the bottom right.

3. Known Bugs and Limitations

None