Improvements

- Automated system to identify client within an email and populate Client entity in case information
- Open two things at the same time (two email chains for example)
- More filtering, customizable - save filters as presets
- Notifications; too many. Need to turn on and off for specific queues
- no way to re-attach information from a previous email to show that information was already sent-- have to take a screenshot instead
- wants to see who the email is going to; and all just general information.
- would be useful to have an unmerge case option if a case is accidentally merged to the wrong client
- **Search by sender of an email**
- **Spell check when sending emails**
- **Would like to be able to filter grid by specific people-- right now can only filter alphabetically and by cases that are assigned/ unassigned to you**
- if they incorrectly send an email, there are no options to recall (30 second unsend or recall function?)
- Saving grid state when tab is switched/closed (sorting, filtering, etc)
- Visuals/dashboards need to be expanded - more types of cases (revisit for specifics)
- Integration with Merlin/Swift with autoupdates
- Ability to export information
- after clicking into a specific case on the grid and then closing it, would be nice if the grid stayed in the same place as opposed to bringing him all the way to the top again (preserve scroll position)
- Needs to see more email information; who its from
- In the details view of the tab, for the ones you have to hover over, they want to be able to pin that at the top. or customize which tabs they want (this is in the case details not the top tabs)
- **would like more formatting options for emails (example: html for mainframe). In chrome, it becomes an image, but in Firefox it pastes the text...but not formatted correctly**
- **Bulk mark as risky / bulk edit**
- Should be able to tell the difference between internal & external emails in the email square
- Wants to apply template in the Classification square (only 1 person asked for this)
- Move the "View more" button to the top of the email section
- Templates that are used often should be recigonized and suggested
- would like for all related cases (continuations and their assist cases) to be listed together
- High volume of inquries - wants an automated confirmation email sent to acknowledge the inquiry
- Quick filters/column filters. ability to filter any column
- **Unable to prioritize cases within a queue. Wants to highlight urgent cases**
- **keyword should be populated; has to look up keyword for a case in a different system-- and then after the keyword is assigned, the team needs to manually assign the case to themselves**
- **View pending cases for respective team members**

Doesn't Work

- Assign to me button (when assigned to someone else)
- Can't filter by user
- cases being closed in eCRM are being reoopened by emails being sent
- In the assist case details, there is no information, it's just a link to the case. Users want to see the info
- Cant copy and paste the attatchment from the origin case to the assist case; it should automatically come over
- Manually enters information because it ends up being faster than using templates
- auto-save causes work to be lost while using emails
- Case history is difficult to understand - when a case is canceled, information still gets updated to it - this shouldn't happen
- **if someone is added to a case, a new case is created. This should not happen-- if someone forwards the email or changes the subject line, it will create a new case**
- when # of unassigned cases exceeds 250, that maxes out the # of cases that can be shown on a page, and when filtering is applied, it's only applied to the first page, and not whatever cases are on the second page.
- Can't have two tabs open (would be helpful for comparision purposes)
- Notifications are broken - too many to the point that they're useless
- can't see full email name in grid
- cant copy and paste a distribution list (12/15 emails at a time)
- Templates sometimes don't fill in the information correctly
- Global search is unable to find cases & if you search subject line it won't work either
- Dot ellipses in emails do not consistently work-- happens every time a relationship manager is attached?
- **when origin case is resolved, assist still remains open. Assist should close with origin**
- **sometimes screenshots work, sometimes they don't-- has to download screenshot to see it**
- **cancelled/resolved cases listed in grid are not always the queus she has access to too-- has to filter by cases relevant to her team**
- Templates are helpful but they are annoying to use
- Has an issue with chrome vs.firefox
- Attachment issue; cant attatch documents to assist cases
- errors when trying to apply templates; some entitlement error pops up
- When copying & pasting into eCRM it messes up the format
- If someone gets removed from a case, they should be removed from the distribution list; they dont right now
- Diagrams should be link to the cases - there seems to be a data issue
- **Unable to search by account number**
- **Cant copy and paste case information**
- **classification is pulling incorrect information (machine learning not great)**
- **selecting one signature in an email does not swap out the other one**

Confusion

- Can't attach anything to a case (Jack W)
- Generic account (Jack W)
- possibility that an email may be sent to the wrong person-- autosearch on names should be disabled?
- doesn't make sense to click the box at the top of the templates page to see his templates
- Scrolling for emails is tedious

Too Clicky

- Creating a Case
- Creating an Assist
- Resolving a Case
- Assigning Case to myself when already assigned to someone else

Too Slow

- ... are super slow
- ... an Assist
- **When trying to resolve a case, after updating it takes a while before the system registers & lets you resolve it**

****bolded items have to be reviewed still**