

Instant Chime V5 For Microsoft Teams Simple Test Plan

Last Updated	Tuesday, December 12, 2023
Estimated Time To Complete + People	30 Minutes -
Participants	3 people with 1 Manager, 1 Agent, and 1 Guest coming in via MS Teams or web client
Tip:	You may want to start a MS Teams meeting during the testing to discuss steps and/or items covered.
Testing Details	Chime Instance (your tenant URL):

ACTION TAKER	ITEM	Y/N ?
ADMIN	Chime instance is up and running (can login to instance)	
ADMIN	View list of agents and managers and verify that agents and managers are available	
ADMIN	At least 1 agent is in active\available state in Queue to pick up chat (Queue Dashboard)	
MANAGER	View Manager Dashboard - possibly add agent list to dashboard - inspect ASA and other metrics	
END USER	Start test chat with the Chime V5 using MS Teams - Repeat using Web Client if using web client	
END USER	(Optional) If your default pipeline a conditional flow, then verify that the flow is working as expected	
END USER	Welcome message received after starting test chat session	
END USER	Periodic routing notification message received in test chat session (when routing to an agent list)	
MANAGER	Manager can see the chat populate in the manager dashboard and active chats panel	
AGENT	Receives notification for incoming END USER test chat session (in MS Teams or Agent Dashboard)	
AGENT	Pick chat session notified via MS Teams channel, MS Teams direct message, or Agent Web Client	
END USER	Optional (Start chat using web client - test web client)	
AGENT	Check Agent Dashboard for new active chat and all user information is correct	
END USER	Receives notification for chat accepted by AGENT	
AGENT	Receives notification that they are connected with END USER	
END USER	Do text messages go through clearly?	
AGENT	Do text messages go through clearly?	
END USER	Do images go through clearly?	
AGENT	Do images go through clearly?	
END USER	Do attachments (i.e. pdf) go through clearly?	
AGENT	Do attachments (i.e. pdf) go through clearly?	
AGENT	Do Standard Replies get sent to END USER?	
END USER	Is able to close chat session with /end command	
AGENT	Is able to close chat session with /end command	
END USER	Receives chat closure message	
AGENT	Receives chat closure message	
Virtual Agent (optional)	Ticket is created with chat session information	
MANAGER (Charting)	Reports: Basic Stats\Inbound vs Connected view chats for today or date range	

MANAGER (Charting)	Export Report as CSV and make sure data is correct (button near date selector)
MANAGER (Details Dashboard)	Open the Session Details for the chat session (Queue Dashboard - Details)
MANAGER (View Chat Session)	Export Session Details for the chat (Export Details blue button)
MANAGER (View Agents)	View agent list (left side manager UI) - verify list of agents
MANAGER (View Agents)	Confirm agent count is correct - and status is accurate
MANAAGER (View Agents)	Select data range for a few days, refresh report for that agent - confirm data populating
MANAGER (Standard Replies)	Verify standard replies are visible - (Content\Standard Replies)
MANAGER (Standard Replies)	Do a basic search on standard replies
AGENT (Dashboard)	Agent views agent dashboard - they see agent dashboard
AGENT (Dashboard)	Click on agent profile (name drop down and then agent profile)
AGENT (Dashboard)	Agent can change status (available\offline) and it reflects to manager and other agents
AGENT (Dashboard)	Optional - agent sees inbound chat waiting as chat is routed to agent
AGENT (Dashboard)	Agent accepts chat conversation from agent dashboard
AGENT (Dashboard)	Verify agent settings for end session and sound on message receive are accurate