Instant Chime V4 For Microsoft Teams Simple Test Plan

Last Updated	Thursday, November 9, 2023
Estimated Time To Complete + People	30 Minutes - requires 1 Manager, 1 Agent, 1 Guest (or seeker)
Tip:	Since you may be using a MS Teams meeting during testing, double check your MS Teams presence if you are agent - in case Teams sets your presence as 'Busy' or 'In Meeting' - also, you may want to save results as new file
Testing Details	Chime Server: Queue Name: Queue URL:

ACTION TAKER	ITEM	Y/N ?
ADMIN	Chime Service is up and running	
ADMIN	Queue is active (Queue Dashboard check Online and Available) or Admin\Control Panel	
ADMIN	At least 1 agent is in active\available state in Queue to pick up chat (Queue Dashboard)	
MANAGER	View My Manager Home\System Dashboard - verify queue list, agents online, queue state	
END USER	Start test chat with the Queue using MS Teams - Repeat using Web Client if using web client	
END USER	(Optional) If your Queue has an Interview, the END USER is able to route through the Interview	
END USER	Welcome message received after starting test chat session	
END USER	Periodic routing notification message received in test chat session	
MANAGER	Manager can see the chat populate in the Monitor Tab on Queue Dashboard	
AGENT	Receives notification for incoming END USER test chat session (in MS Teams or Agent Dashboard)	
AGENT	Pick chat session (via MS Teams or 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)	Charting: Basic Statistics\Inbound vs Answered view chats for today or date range	
MANAGER (Charting)	Click one of the chat datapoints and see the drilldown chats for the time period	

MANAGER (Charting)	Click on chat details list of chats - view chat details (session in blue button) - verify looks accurate
MANAGER (Charting)	Export Report as CSV and make sure data is correct (button near date selector)
MANAGER (Charting)	Click on 'Download drill down data' button - located above the list of chats
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
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 -
MANAGER (Standard Replies)	Do a basic search on standard replies
AGENT (Dashboard)	Agent views agent dashboard - they see agent dashboard
AGENT (Dashboard)	Click on 'Menu' on left of dashboard and view properties - verify list of queues, picture, name, status
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, translation, and sound on message receive are accurate
END USER (Home Page)	End user visits home page https://URL/Chime/#!/
END USER (Home Page)	See list of queues on home page
END USER (GUEST Dashboard)	View My Guest Dashboard - verify stats and chat history are accurrate
END USER (GUEST Dashboard)	If outage is active, view outage notification