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ASSEMBLE INSURANCE TANZANIA LTD

Software Requirements Specification

SAS Customer Service & CRM Module

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https://www.assemble.co.tz/

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1 Document Information

Field	Value
Project Name	SAS Customer Service & CRM Module
Version	1.0
Date	2025-10-17
Project Manager	TBD
Tech Lead	TBD
Qa Lead	TBD
Platforms	['Web', 'Mobile (iOS/Android)']
Document Status	Comprehensive Draft
Module Code	CS_CRM
Parent Project	SAS - Smart Assemble System

2 Project Overview

2.1 What Are We Building

2.1.1 System Function

Comprehensive customer service and CRM system handling multi-channel customer interactions (phone, email, live chat, WhatsApp chatbot), ticketing and case management, complaint tracking, escalation workflows, knowledge base, self-service tools, customer 360-degree view, interaction history, SLA tracking, and customer service analytics

2.1.2 Users

- Customer Service Representatives (inquiry resolution)
- Customer Service Supervisors (escalation and quality)
- Call Center Agents (phone support)
- Chat Agents (live chat and messaging support)
- Customer Service Manager (oversight and analytics)
- Members (self-service and support interactions)
- Providers (support inquiries)
- Agents/Brokers (support inquiries)

2.1.3 Problem Solved

Fragmented customer interactions across channels, no unified view of customer, delayed response times, manual ticket routing, no SLA tracking, limited self-service options, lack of knowledge base, inconsistent service quality, no chatbot for 24/7 support, manual escalation processes

2.1.4 Key Success Metric

90% first-contact resolution rate, <5 minute average response time for chat/chatbot, <24 hours for email resolution, 95% SLA compliance, 80% customer satisfaction score (CSAT), 60% self-service adoption, 50% chatbot resolution rate for routine inquiries

2.2 Scope

2.2.1 In Scope

- Multi-channel support (phone, email, live chat, WhatsApp chatbot)
- Ticketing system with case management
- Automated ticket routing and assignment
- Escalation workflows with SLA tracking
- Complaint management and tracking
- Knowledge base and FAQ management
- Self-service member portal integration
- WhatsApp chatbot with NLP (dialogflow/rasa)
- Customer 360-degree view (member profile, policies, claims, interactions)
- Interaction history across all channels
- CRM functionality (customer segmentation, campaigns)
- Quality monitoring and call recording
- Customer satisfaction surveys (CSAT, NPS)
- Real-time dashboards for service metrics
- Integration with telephony system (CTI)
- Email integration (inbox management)
- SMS notifications for ticket status
- Automated responses for common inquiries
- Service level agreement (SLA) management

2.2.2 Out Of Scope

- Outbound telemarketing campaigns (handled in Sales)
- Advanced marketing automation (future phase)
- Social media management (Twitter, Facebook monitoring)
- Video call support (future phase)
- Advanced AI sentiment analysis (future phase)

3 User Requirements

3.1 Ticketing Case Management

Feature Code	I Want To	So That I Can	Priority	Notes
FT-CS-TICKET-CREATE	Create support tickets from any channel	Track and resolve customer issues	Must	Ticket creation from: phone call, email, live chat, WhatsApp, member portal, walk-in. Auto-populate member info if authenticated.
FT-CS-TICKET-CATEGORIZATION	Categorize tickets by type and priority	Route tickets appropriately	Must	Categories: Claim inquiry, Policy inquiry, Billing inquiry, Complaint, Technical issue, Provider inquiry. Priority: Low, Medium, High, Critical.
FT-CS-TICKET-ASSIGNMENT	Auto-assign tickets based on rules	Ensure timely handling	Must	Assignment rules: round-robin, skill-based, workload-based. Manual reassignment. Team queues. Availability status.
			Must	

Feature Code	I Want To	So That I Can	Priority	Notes
FT-CS-TICKET-TRACKING	Track ticket status and history	Monitor progress to resolution		Status: New, Assigned, In Progress, Pending Customer, Resolved, Closed. Status history. Activity timeline. Attachments.
FT-CS-TICKET-MERGE-SPLIT	Merge duplicate tickets or split complex tickets	Manage tickets efficiently	Should	Merge tickets: link related tickets, maintain history. Split tickets: create child tickets for multi-issue cases.

3.2 Multi Channel Support

Feature Code	I Want To	So That I Can	Priority	Notes
FT-CS-PHONE-SUPPORT	Handle phone calls with CTI integration	Provide efficient phone support	Must	CTI integration: screen pop with member info, call logging, call recording, call transfer, conference, hold, voicemail. IVR integration.
FT-CS-EMAIL-SUPPORT	Manage email inquiries efficiently	Respond to email requests timely	Must	Email inbox integration: shared inbox, email-to-ticket conversion, email threading, canned responses, email

Feature Code	I Want To	So That I Can	Priority	Notes
				templates, attachment handling.
FT-CS-LIVE-CHAT	Provide live chat support on website/portal	Offer real-time assistance	Must	Live chat: chat widget on website, chat queue, typing indicators, file sharing, chat transfer, chat history, proactive chat invitations.
FT-CS-WHATSAPP-CHATBOT	Deploy WhatsApp chatbot for 24/7 support	Handle routine inquiries automatically	Must	WhatsApp Business API integration. NLP engine (Dialogflow/Rasa). Bot capabilities: FAQs, policy status, claim status, find provider, eligibility check. Handoff to human agent.
FT-CS-SMS-SUPPORT	Send SMS notifications for ticket updates	Keep customers informed	Must	SMS notifications: ticket created, assigned, resolved. Two-way SMS support. SMS templates.
FT-CS-CHANNEL-SWITCHING	Switch channels during conversation	Provide seamless omnichannel experience	Should	Channel handoff: chat to phone, email to chat, etc. Maintain context

Feature Code	I Want To	So That I Can	Priority	Notes
				across channels. Unified conversation view.

3.3 Escalation Sla

Feature Code	I Want To	So That I Can	Priority	Notes
FT-CS-ESCALATION-RULES	Define and automate escalation rules	Ensure critical issues are prioritized	Must	Escalation triggers: ticket age, priority, customer type (VIP), unresolved status. Escalation hierarchy: Tier 1 -> Tier 2 -> Supervisor -> Manager.
FT-CS-SLA-MANAGEMENT	Define and track SLAs for different ticket types	Meet service commitments	Must	SLA definitions: response time, resolution time by priority/ category. SLA countdown timer. Breach alerts. SLA reporting.
FT-CS-SLA-BREACH-ALERTS	Get alerted when SLA is at risk or breached	Take corrective action	Must	Alerts: email/ SMS when 75% of SLA time consumed, breach notifications. Dashboard alerts. Escalation on breach.

Feature Code	I Want To	So That I Can	Priority	Notes
FT-CS-VIP-CUSTOMER-HANDLING	Identify and prioritize VIP customers	Provide premium service	Should	VIP identification: corporate clients, high-value policies. VIP routing: dedicated queue, faster SLA. VIP indicators in interface.

3.4 Complaint Management

Feature Code	I Want To	So That I Can	Priority	Notes
FT-CS-COMPLAINT-REGISTRATION	Register formal complaints	Track and resolve complaints systematically	Must	Complaint types: service quality, claim denial, provider issue, billing dispute. Complaint severity. Regulatory complaint flag (TIRA).
FT-CS-COMPLAINT-INVESTIGATION	Conduct complaint investigation	Determine root cause and resolution	Must	Investigation workflow: assign investigator, gather facts, interview stakeholders, determine root cause, propose resolution. Investigation notes.

Feature Code	I Want To	So That I Can	Priority	Notes
FT-CS-COMPLAINT-RESOLUTION	Track complaint resolution and customer satisfaction	Close complaints properly	Must	Resolution actions: refund, policy adjustment, apology, corrective action. Resolution approval. Customer acceptance. Closure survey.
FT-CS-REGULATORY-REPORTING	Generate regulatory complaint reports	Comply with regulatory requirements	Must	TIRA complaint reporting: quarterly reports. Complaint categorization per regulatory requirements. Complaint resolution timeframes.

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3.5 Knowledge Base

Feature Code	I Want To	So That I Can	Priority	Notes
FT-CS-KB-MANAGEMENT	Create and manage knowledge base articles	Provide consistent information to agents and customers	Must	KB article types: FAQ, How-to guide, Policy document, Troubleshooting. Categories. Tags. Versioning. Approval workflow.
FT-CS-KB-SEARCH	Search knowledge base during	Quickly find answers	Must	KB search: full-text search, filters by category/tag.

Feature Code	I Want To	So That I Can	Priority	Notes
	customer interaction			Suggested articles based on ticket. Search analytics. Most viewed articles.
FT-CS-KB-SELF-SERVICE	Expose knowledge base to customers for self-service	Enable customers to help themselves	Must	Public KB portal: searchable, categorized. Helpful/not helpful feedback. Article views tracking. Related articles.
FT-CS-KB-ANALYTICS	Analyze knowledge base usage	Improve content	Should	KB analytics: article views, search terms, helpful ratings, gaps in content. Content improvement recommendations.

3.6 Chatbot Automation

Feature Code	I Want To	So That I Can	Priority	Notes
FT-CS-CHATBOT-NLP	Use NLP to understand customer intent	Provide accurate automated responses	Must	NLP engine: Dialogflow or Rasa. Intent recognition. Entity extraction. Multi-turn conversations. Context management.
FT-CS-CHATBOT-INTENTS	Configure chatbot intents for common inquiries	Automate routine responses	Must	Common intents: Check policy status, Check claim status, Find

Feature Code	I Want To	So That I Can	Priority	Notes
				provider, Check eligibility, Update contact info, FAQ. Training phrases.
FT-CS-CHATBOT-INTEGRATION	Integrate chatbot with backend systems	Provide real-time information	Must	API integration: Policy API, Claims API, Provider API, Member API. Secure authentication. Real-time data retrieval.
FT-CS-CHATBOT-HANDOFF	Transfer chatbot conversation to human agent	Handle complex issues	Must	Human handoff triggers: customer request, bot confidence low, complex inquiry. Context transfer. Agent takes over conversation. Return to bot option.
FT-CS-CHATBOT-ANALYTICS	Analyze chatbot performance	Improve bot accuracy	Must	Chatbot metrics: conversations, resolution rate, handoff rate, user satisfaction. Unrecognized intents. Training recommendations.

3.7 Customer 360

Feature Code	I Want To	So That I Can	Priority	Notes
FT-CS-CUSTOMER-PROFILE	View comprehensive customer profile	Understand customer context	Must	Customer 360: member demographics,

Feature Code	I Want To	So That I Can	Priority	Notes
				policies, claims history, payment history, interaction history, preferences, complaints, documents.
FT-CS-INTERACTION-HISTORY	View complete interaction history across channels	Provide informed service	Must	Interaction timeline: phone calls, emails, chats, WhatsApp, tickets, complaints. Chronological view. Interaction details. Agent notes.
FT-CS-RELATED-RECORDS	View related records (policies, claims, payments)	Access all relevant information	Must	Related records: active policies with details, recent claims with status, payment history, outstanding balances. Quick actions from profile.
FT-CS-CUSTOMER-NOTES	Add internal notes to customer profile	Document important information	Must	Agent notes: private notes visible to internal staff only. Note categories. Important note pinning. Note search.

3.8 Crm Functionality

Feature Code	I Want To	So That I Can	Priority	Notes
FT-CS-CUSTOMER-SEGMENTATION	Segment customers for targeted communication	Personalize customer engagement	Should	Segmentation criteria: policy type, value, claims history, tenure, engagement level. Dynamic segments. Segment analytics.
FT-CS-CAMPAIGNS	Create and manage customer communication campaigns	Engage customers proactively	Should	Campaign types: email, SMS. Campaign templates. Audience selection. Schedule campaigns. Campaign tracking (open rate, click rate).
FT-CS-MEMBER-LIFECYCLE	Track member lifecycle stages	Provide stage-appropriate service	Should	Lifecycle stages: New member, Active, At-risk, Lapsed, Renewed. Stage transitions. Stage-based workflows. Retention campaigns.
FT-CS-CUSTOMER-RETENTION	Identify at-risk customers and retention opportunities	Reduce churn	Should	At-risk indicators: late payments, complaints, low engagement, policy cancellation

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Feature Code	I Want To	So That I Can	Priority	Notes
				requests. Retention workflows. Win-back campaigns.

3.9 Quality Monitoring

Feature Code	I Want To	So That I Can	Priority	Notes
FT-CS-CALL-RECORDING	Record customer service calls	Monitor quality and provide training	Must	Call recording: automatic recording, secure storage, playback. Call tagging. Quality scoring. Regulatory compliance (consent).
FT-CS-QUALITY-SCORING	Score agent performance on interactions	Measure service quality	Must	Quality scorecard: greeting, professionalism, knowledge, problem resolution, closing. Random sampling. Supervisor scoring. Agent feedback.
FT-CS-COACHING	Provide coaching and feedback to agents	Improve agent performance	Should	Coaching sessions: scheduled coaching, feedback documentation, improvement plans. Coaching

Feature Code	I Want To	So That I Can	Priority	Notes
				templates. Performance tracking.

3.10 Customer Feedback

Feature Code	I Want To	So That I Can	Priority	Notes
FT-CS-CSAT-SURVEYS	Send customer satisfaction surveys after interactions	Measure service quality	Must	CSAT survey: sent post-interaction (SMS/email). Rating scale (1-5). Comments. Survey response rate. Trend analysis.
FT-CS-NPS-SURVEYS	Measure Net Promoter Score	Gauge customer loyalty	Should	NPS survey: periodic surveys (quarterly/annual). 0-10 scale. Promoter/Passive/Detractor classification. Follow-up workflows.
FT-CS-FEEDBACK-ANALYSIS	Analyze customer feedback	Identify improvement areas	Must	Feedback analysis: sentiment analysis, common themes, trends over time. Agent-level analysis. Category-level analysis.

3.11 Reporting Analytics

Feature Code	I Want To	So That I Can	Priority	Notes
FT-CS-TICKET-REPORTS	Generate ticket volume and resolution reports	Monitor workload and efficiency	Must	Reports: ticket volume by channel/ category/ priority, resolution time, first-contact resolution, backlog, aging tickets.
FT-CS-AGENT-PERFORMANCE	Generate agent performance reports	Evaluate individual and team performance	Must	Metrics: tickets handled, average handle time, resolution rate, CSAT scores, quality scores. Agent ranking. Performance trends.
FT-CS-SLA-REPORTS	Generate SLA compliance reports	Ensure service commitments are met	Must	SLA reports: compliance rate by SLA type, breaches by category, escalations. SLA trends. Root cause analysis.
FT-CS-CHANNEL-ANALYTICS	Analyze channel usage and performance	Optimize channel strategy	Must	Channel metrics: volume by channel, response time, resolution time, customer preference. Channel cost analysis.

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Feature Code	I Want To	So That I Can	Priority	Notes
				Channel shift trends.
FT-CS-REAL-TIME-DASHBOARD	View real-time service metrics	Monitor operations	Must	Real-time dashboard: current queue depth, average wait time, agents online, active chats, SLA at-risk tickets. Wallboard display.

4 Detailed Feature Requirements

4.1 Ft Cs Ticket Create

4.1.1 Priority

Must Have

4.1.2 User Story

As a customer service representative, I want to create support tickets from any channel so that I can track and resolve customer issues

4.1.3 Preconditions

CS representative logged in, customer contact initiated

4.1.4 Postconditions

Ticket created with unique ID, assigned to appropriate queue, customer notified

4.1.5 Test Cases

Id	Description	Weight
TICKET-CREATE-TC-001	Verify ticket can be created from phone call	High
TICKET-CREATE-TC-002	Verify ticket can be created from email	High
TICKET-CREATE-TC-003	Verify ticket can be created from live chat	High
TICKET-CREATE-TC-004	Verify ticket can be created from WhatsApp	High
TICKET-CREATE-TC-005	Verify ticket can be created from member portal	High

Id	Description	Weight
TICKET-CREATE-TC-006	Verify member info auto-populated if authenticated	High
TICKET-CREATE-TC-007	Verify unique ticket ID generated	High

4.2 Ft Cs Ticket Categorization

4.2.1 Priority

Must Have

4.2.2 User Story

As a customer service representative, I want to categorize tickets so that they are routed appropriately

4.2.3 Preconditions

Ticket being created

4.2.4 Postconditions

Ticket categorized and prioritized

4.2.5 Test Cases

Id	Description	Weight
TICKET-CATEGORIZATION-TC-001	Verify claim inquiry category available	High
TICKET-CATEGORIZATION-TC-002	Verify policy inquiry category available	High
TICKET-CATEGORIZATION-TC-003	Verify billing inquiry category available	High
TICKET-CATEGORIZATION-TC-004	Verify complaint category available	High

Id	Description	Weight
TICKET-CATEGORIZATION-TC-005	Verify priority levels (Low, Medium, High, Critical)	High
TICKET-CATEGORIZATION-TC-006	Verify category affects routing	High

4.3 Ft Cs Ticket Assignment

4.3.1 Priority

Must Have

4.3.2 User Story

As a CS supervisor, I want to auto-assign tickets based on rules so that I can ensure timely handling

4.3.3 Preconditions

Ticket created and categorized, assignment rules configured

4.3.4 Postconditions

Ticket assigned to appropriate agent or queue

4.3.5 Test Cases

Id	Description	Weight
TICKET-ASSIGNMENT-TC-001	Verify round-robin assignment	High
TICKET-ASSIGNMENT-TC-002	Verify skill-based assignment	High
TICKET-ASSIGNMENT-TC-003	Verify workload-based assignment	High
TICKET-ASSIGNMENT-TC-004	Verify manual reassignment	High

Id	Description	Weight
TICKET-ASSIGNMENT-TC-005	Verify team queue assignment	High
TICKET-ASSIGNMENT-TC-006	Verify agent availability status checked	High

4.4 Ft Cs Ticket Tracking

4.4.1 Priority

Must Have

4.4.2 User Story

As a customer service representative, I want to track ticket status and history so that I can monitor progress to resolution

4.4.3 Preconditions

Ticket exists in system

4.4.4 Postconditions

Ticket status updated, history maintained

4.4.5 Test Cases

Id	Description	Weight
TICKET-TRACKING-TC-001	Verify status transitions (New -> Assigned -> In Progress -> Resolved -> Closed)	High
TICKET-TRACKING-TC-002	Verify status history maintained	High
TICKET-TRACKING-TC-003	Verify activity timeline visible	High
TICKET-TRACKING-TC-004	Verify attachments supported	High

Id	Description	Weight
TICKET-TRACKING-TC-005	Verify Pending Customer status available	High
TICKET-TRACKING-TC-006	Verify audit trail maintained	High

4.5 Ft Cs Ticket Merge Split

4.5.1 Priority

Should Have

4.5.2 User Story

As a customer service representative, I want to merge duplicate tickets or split complex tickets so that I can manage tickets efficiently

4.5.3 Preconditions

Multiple related tickets or one complex ticket

4.5.4 Postconditions

Tickets merged or split, history maintained

4.5.5 Test Cases

Id	Description	Weight
TICKET-MERGE-SPLIT-TC-001	Verify duplicate tickets can be merged	High
TICKET-MERGE-SPLIT-TC-002	Verify related tickets can be linked	High
TICKET-MERGE-SPLIT-TC-003	Verify history maintained after merge	High
TICKET-MERGE-SPLIT-TC-004	Verify complex ticket can be split	High

Id	Description	Weight
TICKET-MERGE-SPLIT-TC-005	Verify child tickets created for multi-issue cases	High

4.6 Ft Cs Phone Support

4.6.1 Priority

Must Have

4.6.2 User Story

As a call center agent, I want CTI integration so that I can provide efficient phone support

4.6.3 Preconditions

CTI system configured, agent logged in

4.6.4 Postconditions

Call handled, logged, and recorded

4.6.5 Test Cases

Id	Description	Weight
PHONE-SUPPORT-TC-001	Verify screen pop with member info on incoming call	High
PHONE-SUPPORT-TC-002	Verify call logging automatic	High
PHONE-SUPPORT-TC-003	Verify call recording enabled	High
PHONE-SUPPORT-TC-004	Verify call transfer functionality	High
PHONE-SUPPORT-TC-005	Verify conference call functionality	High
PHONE-SUPPORT-TC-006	Verify hold/resume functionality	High

Id	Description	Weight
PHONE-SUPPORT-TC-007	Verify voicemail integration	Medium
PHONE-SUPPORT-TC-008	Verify IVR integration	High

4.7 Ft Cs Email Support

4.7.1 Priority

Must Have

4.7.2 User Story

As a customer service representative, I want to manage email inquiries efficiently so that I can respond timely

4.7.3 Preconditions

Email inbox configured

4.7.4 Postconditions

Emails converted to tickets, responses sent

4.7.5 Test Cases

Id	Description	Weight
EMAIL-SUPPORT-TC-001	Verify shared inbox accessible	High
EMAIL-SUPPORT-TC-002	Verify email-to-ticket conversion automatic	High
EMAIL-SUPPORT-TC-003	Verify email threading maintained	High
EMAIL-SUPPORT-TC-004	Verify canned responses available	High
EMAIL-SUPPORT-TC-005	Verify email templates available	High

Id	Description	Weight
EMAIL-SUPPORT-TC-006	Verify attachment handling supported	High

4.8 Ft Cs Live Chat

4.8.1 Priority

Must Have

4.8.2 User Story

As a chat agent, I want to provide live chat support so that I can offer real-time assistance

4.8.3 Preconditions

Chat system configured, agent available

4.8.4 Postconditions

Chat session handled, transcript saved

4.8.5 Test Cases

Id	Description	Weight
LIVE-CHAT-TC-001	Verify chat widget displayed on website	High
LIVE-CHAT-TC-002	Verify chat queue managed	High
LIVE-CHAT-TC-003	Verify typing indicators shown	Medium
LIVE-CHAT-TC-004	Verify file sharing supported	High
LIVE-CHAT-TC-005	Verify chat transfer to another agent	High
LIVE-CHAT-TC-006	Verify chat history maintained	High
LIVE-CHAT-TC-007	Verify proactive chat invitations	Medium

4.9 Ft Cs Whatsapp Chatbot

4.9.1 Priority

Must Have

4.9.2 User Story

As a customer service manager, I want WhatsApp chatbot for 24/7 support so that I can handle routine inquiries automatically

4.9.3 Preconditions

WhatsApp Business API configured, chatbot deployed

4.9.4 Postconditions

Routine inquiries handled by bot, complex issues escalated to human

4.9.5 Test Cases

Id	Description	Weight
WHATSAPP-CHATBOT-TC-001	Verify WhatsApp Business API integrated	High
WHATSAPP-CHATBOT-TC-002	Verify NLP engine (Dialogflow/Rasa) operational	High
WHATSAPP-CHATBOT-TC-003	Verify FAQ inquiries handled	High
WHATSAPP-CHATBOT-TC-004	Verify policy status check supported	High
WHATSAPP-CHATBOT-TC-005	Verify claim status check supported	High
WHATSAPP-CHATBOT-TC-006	Verify find provider functionality	High
WHATSAPP-CHATBOT-TC-007	Verify eligibility check supported	High

Id	Description	Weight
WHATSAPP-CHATBOT-TC-008	Verify handoff to human agent	High

4.10 Ft Cs Sms Support

4.10.1 Priority

Must Have

4.10.2 User Story

As a customer service representative, I want to send SMS notifications so that I can keep customers informed

4.10.3 Preconditions

SMS gateway configured

4.10.4 Postconditions

SMS notifications sent for ticket updates

4.10.5 Test Cases

Id	Description	Weight
SMS-SUPPORT-TC-001	Verify SMS sent when ticket created	High
SMS-SUPPORT-TC-002	Verify SMS sent when ticket assigned	High
SMS-SUPPORT-TC-003	Verify SMS sent when ticket resolved	High
SMS-SUPPORT-TC-004	Verify two-way SMS support	Medium
SMS-SUPPORT-TC-005	Verify SMS templates available	High

4.11 Ft Cs Channel Switching

4.11.1 Priority

Should Have

4.11.2 User Story

As a customer service representative, I want to switch channels during conversation so that I can provide seamless omnichannel experience

4.11.3 Preconditions

Multi-channel support configured

4.11.4 Postconditions

Channel switched, context maintained

4.11.5 Test Cases

Id	Description	Weight
CHANNEL-SWITCHING-TC-001	Verify chat to phone handoff	High
CHANNEL-SWITCHING-TC-002	Verify email to chat handoff	High
CHANNEL-SWITCHING-TC-003	Verify context maintained across channels	High
CHANNEL-SWITCHING-TC-004	Verify unified conversation view	High

4.12 Ft Cs Escalation Rules

4.12.1 Priority

Must Have

4.12.2 User Story

As a CS supervisor, I want to define and automate escalation rules so that critical issues are prioritized

4.12.3 Preconditions

Escalation rules configured

4.12.4 Postconditions

Tickets escalated per rules, appropriate parties notified

4.12.5 Test Cases

Id	Description	Weight
ESCALATION-RULES-TC-001	Verify escalation by ticket age	High
ESCALATION-RULES-TC-002	Verify escalation by priority	High
ESCALATION-RULES-TC-003	Verify escalation for VIP customers	High
ESCALATION-RULES-TC-004	Verify escalation hierarchy (Tier 1 -> Tier 2 -> Supervisor -> Manager)	High
ESCALATION-RULES-TC-005	Verify escalation notifications sent	High

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4.13 Ft Cs Sla Management

4.13.1 Priority

Must Have

4.13.2 User Story

As a CS manager, I want to define and track SLAs so that I can meet service commitments

4.13.3 Preconditions

SLA definitions configured

4.13.4 Postconditions

SLAs tracked, compliance monitored

4.13.5 Test Cases

Id	Description	Weight
SLA-MANAGEMENT-TC-001	Verify response time SLAs defined	High
SLA-MANAGEMENT-TC-002	Verify resolution time SLAs defined	High
SLA-MANAGEMENT-TC-003	Verify SLAs vary by priority	High
SLA-MANAGEMENT-TC-004	Verify SLAs vary by category	High
SLA-MANAGEMENT-TC-005	Verify SLA countdown timer visible	High
SLA-MANAGEMENT-TC-006	Verify SLA breach alerts generated	High
SLA-MANAGEMENT-TC-007	Verify SLA reporting available	High

4.14 Ft Cs Sla Breach Alerts

4.14.1 Priority

Must Have

4.14.2 User Story

As a CS agent, I want to get alerted when SLA is at risk so that I can take corrective action

4.14.3 Preconditions

SLAs configured, ticket in progress

4.14.4 Postconditions

Alerts sent when SLA at risk or breached

4.14.5 Test Cases

Id	Description	Weight
SLA-BREACH-ALERTS-TC-001	Verify alert at 75% of SLA time	High
SLA-BREACH-ALERTS-TC-002	Verify breach notification sent	High
SLA-BREACH-ALERTS-TC-003	Verify dashboard alerts displayed	High
SLA-BREACH-ALERTS-TC-004	Verify escalation triggered on breach	High
SLA-BREACH-ALERTS-TC-005	Verify email/SMS alerts configurable	Medium

4.15 Ft Cs Vip Customer Handling

4.15.1 Priority

Should Have

4.15.2 User Story

As a CS manager, I want to identify and prioritize VIP customers so that I can provide premium service

4.15.3 Preconditions

VIP customers identified

4.15.4 Postconditions

VIP customers routed to dedicated queue, faster SLA applied

4.15.5 Test Cases

Id	Description	Weight
		High

Id	Description	Weight
VIP-CUSTOMER-HANDLING-TC-001	Verify corporate clients identified as VIP	
VIP-CUSTOMER-HANDLING-TC-002	Verify high-value policies identified as VIP	High
VIP-CUSTOMER-HANDLING-TC-003	Verify VIP routing to dedicated queue	High
VIP-CUSTOMER-HANDLING-TC-004	Verify faster SLA for VIP	High
VIP-CUSTOMER-HANDLING-TC-005	Verify VIP indicator displayed in interface	High

4.16 Ft Cs Complaint Registration

4.16.1 Priority

Must Have

4.16.2 User Story

As a CS representative, I want to register formal complaints so that I can track and resolve complaints systematically

4.16.3 Preconditions

Complaint received from customer

4.16.4 Postconditions

Complaint registered, investigation initiated

4.16.5 Test Cases

Id	Description	Weight
COMPLAINT-REGISTRATION-TC-001	Verify complaint types available (service quality,	High

Id	Description	Weight
	claim denial, provider issue, billing dispute)	
COMPLAINT-REGISTRATION-TC-002	Verify complaint severity captured	High
COMPLAINT-REGISTRATION-TC-003	Verify regulatory complaint flag (TIRA)	High
COMPLAINT-REGISTRATION-TC-004	Verify complaint details captured	High
COMPLAINT-REGISTRATION-TC-005	Verify customer notified of registration	High

4.17 Ft Cs Complaint Investigation

4.17.1 Priority

Must Have

4.17.2 User Story

As a CS supervisor, I want to conduct complaint investigation so that I can determine root cause and resolution

4.17.3 Preconditions

Complaint registered

4.17.4 Postconditions

Investigation completed, root cause identified, resolution proposed

4.17.5 Test Cases

Id	Description	Weight
COMPLAINT-INVESTIGATION-TC-001	Verify investigator can be assigned	High

Id	Description	Weight
COMPLAINT-INVESTIGATION-TC-002	Verify investigation facts can be gathered	High
COMPLAINT-INVESTIGATION-TC-003	Verify stakeholder interviews documented	High
COMPLAINT-INVESTIGATION-TC-004	Verify root cause determination	High
COMPLAINT-INVESTIGATION-TC-005	Verify resolution proposal documented	High
COMPLAINT-INVESTIGATION-TC-006	Verify investigation notes maintained	High

4.18 Ft Cs Complaint Resolution

4.18.1 Priority

Must Have

4.18.2 User Story

As a CS manager, I want to track complaint resolution so that I can close complaints properly

4.18.3 Preconditions

Complaint investigation completed

4.18.4 Postconditions

Resolution implemented, customer satisfied, complaint closed

4.18.5 Test Cases

Id	Description	Weight
COMPLAINT-RESOLUTION-TC-001	Verify resolution actions available (refund, adjustment, apology, corrective action)	High

Id	Description	Weight
COMPLAINT-RESOLUTION-TC-002	Verify resolution approval workflow	High
COMPLAINT-RESOLUTION-TC-003	Verify customer acceptance tracked	High
COMPLAINT-RESOLUTION-TC-004	Verify closure survey sent	High
COMPLAINT-RESOLUTION-TC-005	Verify complaint closed after customer acceptance	High

4.19 Ft Cs Regulatory Reporting

4.19.1 Priority

Must Have

4.19.2 User Story

As a compliance officer, I want to generate regulatory complaint reports so that I can comply with regulatory requirements

4.19.3 Preconditions

Complaints tracked in system

4.19.4 Postconditions

Regulatory reports generated

4.19.5 Test Cases

Id	Description	Weight
REGULATORY-REPORTING-TC-001	Verify TIRA complaint reporting format	High
REGULATORY-REPORTING-TC-002	Verify quarterly reports generated	High

Id	Description	Weight
REGULATORY-REPORTING-TC-003	Verify complaint categorization per regulatory requirements	High
REGULATORY-REPORTING-TC-004	Verify complaint resolution timeframes tracked	High

4.20 Ft Cs Kb Management

4.20.1 Priority

Must Have

4.20.2 User Story

As a knowledge manager, I want to create and manage knowledge base articles so that I can provide consistent information

4.20.3 Preconditions

KB system configured

4.20.4 Postconditions

KB articles created, approved, published

4.20.5 Test Cases

Id	Description	Weight
KB-MANAGEMENT-TC-001	Verify FAQ articles can be created	High
KB-MANAGEMENT-TC-002	Verify How-to guides can be created	High
KB-MANAGEMENT-TC-003	Verify articles can be categorized	High
KB-MANAGEMENT-TC-004	Verify articles can be tagged	High
KB-MANAGEMENT-TC-005	Verify article versioning maintained	High
KB-MANAGEMENT-TC-006	Verify approval workflow for articles	High

4.21 Ft Cs Kb Search

4.21.1 Priority

Must Have

4.21.2 User Story

As a CS agent, I want to search knowledge base during interaction so that I can quickly find answers

4.21.3 Preconditions

KB populated with articles

4.21.4 Postconditions

Relevant articles found and presented

4.21.5 Test Cases

Id	Description	Weight
KB-SEARCH-TC-001	Verify full-text search functional	High
KB-SEARCH-TC-002	Verify filters by category/tag	High
KB-SEARCH-TC-003	Verify suggested articles based on ticket	High
KB-SEARCH-TC-004	Verify search analytics tracked	Medium
KB-SEARCH-TC-005	Verify most viewed articles displayed	Medium

4.22 Ft Cs Kb Self Service

4.22.1 Priority

Must Have

4.22.2 User Story

As a member, I want to access knowledge base so that I can help myself

4.22.3 Preconditions

Public KB portal configured

4.22.4 Postconditions

Members find answers independently

4.22.5 Test Cases

Id	Description	Weight
KB-SELF-SERVICE-TC-001	Verify public KB portal accessible	High
KB-SELF-SERVICE-TC-002	Verify articles searchable	High
KB-SELF-SERVICE-TC-003	Verify articles categorized	High
KB-SELF-SERVICE-TC-004	Verify helpful/not helpful feedback	High
KB-SELF-SERVICE-TC-005	Verify article views tracked	Medium
KB-SELF-SERVICE-TC-006	Verify related articles suggested	Medium

4.23 Ft Cs Kb Analytics

4.23.1 Priority

Should Have

4.23.2 User Story

As a knowledge manager, I want to analyze KB usage so that I can improve content

4.23.3 Preconditions

KB usage data collected

4.23.4 Postconditions

Usage analytics available, content gaps identified

4.23.5 Test Cases

Id	Description	Weight
KB-ANALYTICS-TC-001	Verify article views tracked	High
KB-ANALYTICS-TC-002	Verify search terms analyzed	High
KB-ANALYTICS-TC-003	Verify helpful ratings tracked	High
KB-ANALYTICS-TC-004	Verify content gaps identified	High
KB-ANALYTICS-TC-005	Verify content improvement recommendations	Medium

4.24 Ft Cs Chatbot Nlp

4.24.1 Priority

Must Have

4.24.2 User Story

As a chatbot administrator, I want to use NLP so that the bot can understand customer intent

4.24.3 Preconditions

NLP engine configured and trained

4.24.4 Postconditions

Customer intent accurately recognized

4.24.5 Test Cases

Id	Description	Weight
CHATBOT-NLP-TC-001	Verify Dialogflow or Rasa integrated	High
CHATBOT-NLP-TC-002	Verify intent recognition functional	High
CHATBOT-NLP-TC-003	Verify entity extraction functional	High

Id	Description	Weight
CHATBOT-NLP-TC-004	Verify multi-turn conversations supported	High
CHATBOT-NLP-TC-005	Verify context management maintained	High

4.25 Ft Cs Chatbot Intents

4.25.1 Priority

Must Have

4.25.2 User Story

As a chatbot administrator, I want to configure chatbot intents so that I can automate routine responses

4.25.3 Preconditions

NLP engine configured

4.25.4 Postconditions

Common intents configured and functional

4.25.5 Test Cases

Id	Description	Weight
CHATBOT-INTENTS-TC-001	Verify check policy status intent	High
CHATBOT-INTENTS-TC-002	Verify check claim status intent	High
CHATBOT-INTENTS-TC-003	Verify find provider intent	High
CHATBOT-INTENTS-TC-004	Verify check eligibility intent	High
CHATBOT-INTENTS-TC-005	Verify update contact info intent	High
CHATBOT-INTENTS-TC-006	Verify FAQ intent	High
CHATBOT-INTENTS-TC-007	Verify training phrases configured	High

4.26 Ft Cs Chatbot Integration

4.26.1 Priority

Must Have

4.26.2 User Story

As a chatbot administrator, I want to integrate chatbot with backend systems so that it can provide real-time information

4.26.3 Preconditions

Backend APIs available

4.26.4 Postconditions

Chatbot integrated with APIs, real-time data provided

4.26.5 Test Cases

Id	Description	Weight
CHATBOT-INTEGRATION-TC-001	Verify Policy API integration	High
CHATBOT-INTEGRATION-TC-002	Verify Claims API integration	High
CHATBOT-INTEGRATION-TC-003	Verify Provider API integration	High
CHATBOT-INTEGRATION-TC-004	Verify Member API integration	High
CHATBOT-INTEGRATION-TC-005	Verify secure authentication implemented	High
CHATBOT-INTEGRATION-TC-006	Verify real-time data retrieval functional	High

4.27 Ft Cs Chatbot Handoff

4.27.1 Priority

Must Have

4.27.2 User Story

As a chatbot user, I want to transfer to human agent when needed so that complex issues can be handled

4.27.3 Preconditions

Chatbot conversation active

4.27.4 Postconditions

Conversation transferred to human agent, context maintained

4.27.5 Test Cases

Id	Description	Weight
CHATBOT-HANDOFF-TC-001	Verify customer can request human agent	High
CHATBOT-HANDOFF-TC-002	Verify handoff triggered by low bot confidence	High
CHATBOT-HANDOFF-TC-003	Verify handoff for complex inquiries	High
CHATBOT-HANDOFF-TC-004	Verify context transferred to agent	High
CHATBOT-HANDOFF-TC-005	Verify agent takes over conversation	High
CHATBOT-HANDOFF-TC-006	Verify return to bot option available	Medium

4.28 Ft Cs Chatbot Analytics

4.28.1 Priority

Must Have

4.28.2 User Story

As a chatbot administrator, I want to analyze chatbot performance so that I can improve bot accuracy

4.28.3 Preconditions

Chatbot interactions logged

4.28.4 Postconditions

Performance metrics available, improvement recommendations provided

4.28.5 Test Cases

Id	Description	Weight
CHATBOT-ANALYTICS-TC-001	Verify conversation count tracked	High
CHATBOT-ANALYTICS-TC-002	Verify resolution rate tracked	High
CHATBOT-ANALYTICS-TC-003	Verify handoff rate tracked	High
CHATBOT-ANALYTICS-TC-004	Verify user satisfaction tracked	High
CHATBOT-ANALYTICS-TC-005	Verify unrecognized intents logged	High
CHATBOT-ANALYTICS-TC-006	Verify training recommendations provided	Medium

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4.29 Ft Cs Customer Profile

4.29.1 Priority

Must Have

4.29.2 User Story

As a CS representative, I want to view comprehensive customer profile so that I can understand customer context

4.29.3 Preconditions

Customer exists in system

4.29.4 Postconditions

360-degree customer view displayed

4.29.5 Test Cases

Id	Description	Weight
CUSTOMER-PROFILE-TC-001	Verify member demographics displayed	High
CUSTOMER-PROFILE-TC-002	Verify policies displayed	High
CUSTOMER-PROFILE-TC-003	Verify claims history displayed	High
CUSTOMER-PROFILE-TC-004	Verify payment history displayed	High
CUSTOMER-PROFILE-TC-005	Verify interaction history displayed	High
CUSTOMER-PROFILE-TC-006	Verify preferences displayed	Medium
CUSTOMER-PROFILE-TC-007	Verify complaints displayed	High
CUSTOMER-PROFILE-TC-008	Verify documents accessible	High

4.30 Ft Cs Interaction History

4.30.1 Priority

Must Have

4.30.2 User Story

As a CS representative, I want to view complete interaction history so that I can provide informed service

4.30.3 Preconditions

Interactions logged in system

4.30.4 Postconditions

Complete interaction timeline displayed

4.30.5 Test Cases

Id	Description	Weight
INTERACTION-HISTORY-TC-001	Verify phone calls in timeline	High
INTERACTION-HISTORY-TC-002	Verify emails in timeline	High
INTERACTION-HISTORY-TC-003	Verify chats in timeline	High
INTERACTION-HISTORY-TC-004	Verify WhatsApp in timeline	High
INTERACTION-HISTORY-TC-005	Verify tickets in timeline	High
INTERACTION-HISTORY-TC-006	Verify complaints in timeline	High
INTERACTION-HISTORY-TC-007	Verify chronological order	High
INTERACTION-HISTORY-TC-008	Verify agent notes visible	High

4.31 Ft Cs Related Records

4.31.1 Priority

Must Have

4.31.2 User Story

As a CS representative, I want to view related records so that I can access all relevant information

4.31.3 Preconditions

Customer profile accessed

4.31.4 Postconditions

Related policies, claims, payments displayed

4.31.5 Test Cases

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Id	Description	Weight
RELATED-RECORDS-TC-001	Verify active policies displayed with details	High
RELATED-RECORDS-TC-002	Verify recent claims displayed with status	High
RELATED-RECORDS-TC-003	Verify payment history displayed	High
RELATED-RECORDS-TC-004	Verify outstanding balances displayed	High
RELATED-RECORDS-TC-005	Verify quick actions available from profile	High

4.32 Ft Cs Customer Notes

4.32.1 Priority

Must Have

4.32.2 User Story

As a CS representative, I want to add internal notes so that I can document important information

4.32.3 Preconditions

Customer profile accessed

4.32.4 Postconditions

Notes added, visible to internal staff

4.32.5 Test Cases

Id	Description	Weight
CUSTOMER-NOTES-TC-001	Verify notes can be added	High
CUSTOMER-NOTES-TC-002	Verify notes private (not visible to customer)	High
CUSTOMER-NOTES-TC-003	Verify note categories available	Medium
CUSTOMER-NOTES-TC-004	Verify important notes can be pinned	Medium
CUSTOMER-NOTES-TC-005	Verify notes searchable	Medium

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4.33 Ft Cs Customer Segmentation

4.33.1 Priority

Should Have

4.33.2 User Story

As a CRM manager, I want to segment customers so that I can target communication

4.33.3 Preconditions

Customer data available

4.33.4 Postconditions

Customer segments created

4.33.5 Test Cases

Id	Description	Weight
CUSTOMER-SEGMENTATION-TC-001	Verify segmentation by policy type	High
CUSTOMER-SEGMENTATION-TC-002	Verify segmentation by policy value	High
CUSTOMER-SEGMENTATION-TC-003	Verify segmentation by claims history	High
CUSTOMER-SEGMENTATION-TC-004	Verify segmentation by tenure	High
CUSTOMER-SEGMENTATION-TC-005	Verify dynamic segments supported	High
CUSTOMER-SEGMENTATION-TC-006	Verify segment analytics available	Medium

4.34 Ft Cs Campaigns

4.34.1 Priority

Should Have

4.34.2 User Story

As a CRM manager, I want to create campaigns so that I can engage customers proactively

4.34.3 Preconditions

Segments defined, campaign tools configured

4.34.4 Postconditions

Campaigns created and executed

4.34.5 Test Cases

Id	Description	Weight
CAMPAIGNS-TC-001	Verify email campaigns supported	High
CAMPAIGNS-TC-002	Verify SMS campaigns supported	High
CAMPAIGNS-TC-003	Verify campaign templates available	High
CAMPAIGNS-TC-004	Verify audience selection	High
CAMPAIGNS-TC-005	Verify campaigns can be scheduled	High
CAMPAIGNS-TC-006	Verify campaign tracking (open rate, click rate)	High

4.35 Ft Cs Member Lifecycle

4.35.1 Priority

Should Have

4.35.2 User Story

As a CRM manager, I want to track member lifecycle stages so that I can provide stage-appropriate service

4.35.3 Preconditions

Lifecycle stages defined

4.35.4 Postconditions

Members assigned to stages, transitions tracked

4.35.5 Test Cases

Id	Description	Weight
MEMBER-LIFECYCLE-TC-001	Verify lifecycle stages (New, Active, At-risk, Lapsed, Renewed)	High
MEMBER-LIFECYCLE-TC-002	Verify stage transitions tracked	High
MEMBER-LIFECYCLE-TC-003	Verify stage-based workflows	High
MEMBER-LIFECYCLE-TC-004	Verify retention campaigns triggered	High

4.36 Ft Cs Customer Retention

4.36.1 Priority

Should Have

4.36.2 User Story

As a CRM manager, I want to identify at-risk customers so that I can reduce churn

4.36.3 Preconditions

Retention models configured

4.36.4 Postconditions

At-risk customers identified, retention actions initiated

4.36.5 Test Cases

Id	Description	Weight
CUSTOMER-RETENTION-TC-001	Verify at-risk indicators (late payments, complaints, low engagement)	High

Id	Description	Weight
CUSTOMER-RETENTION-TC-002	Verify policy cancellation requests flagged	High
CUSTOMER-RETENTION-TC-003	Verify retention workflows triggered	High
CUSTOMER-RETENTION-TC-004	Verify win-back campaigns supported	Medium

4.37 Ft Cs Call Recording

4.37.1 Priority

Must Have

4.37.2 User Story

As a CS supervisor, I want to record calls so that I can monitor quality

4.37.3 Preconditions

Call recording system configured

4.37.4 Postconditions

Calls recorded, stored securely, accessible for review

4.37.5 Test Cases

Id	Description	Weight
CALL-RECORDING-TC-001	Verify automatic call recording	High
CALL-RECORDING-TC-002	Verify secure storage	High
CALL-RECORDING-TC-003	Verify playback functionality	High
CALL-RECORDING-TC-004	Verify call tagging	Medium
CALL-RECORDING-TC-005	Verify quality scoring integration	High

Id	Description	Weight
CALL-RECORDING-TC-006	Verify regulatory compliance (consent)	High

4.38 Ft Cs Quality Scoring

4.38.1 Priority

Must Have

4.38.2 User Story

As a CS supervisor, I want to score agent performance so that I can measure service quality

4.38.3 Preconditions

Quality scorecard configured

4.38.4 Postconditions

Interactions scored, performance measured

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4.38.5 Test Cases

Id	Description	Weight
QUALITY-SCORING-TC-001	Verify scorecard components (greeting, professionalism, knowledge, resolution, closing)	High
QUALITY-SCORING-TC-002	Verify random sampling of interactions	High
QUALITY-SCORING-TC-003	Verify supervisor can score interactions	High
QUALITY-SCORING-TC-004	Verify agent feedback mechanism	High
QUALITY-SCORING-TC-005	Verify quality scores aggregated	High

4.39 Ft Cs Coaching

4.39.1 Priority

Should Have

4.39.2 User Story

As a CS supervisor, I want to provide coaching so that I can improve agent performance

4.39.3 Preconditions

Performance data available

4.39.4 Postconditions

Coaching sessions documented, improvement tracked

4.39.5 Test Cases

Id	Description	Weight
COACHING-TC-001	Verify coaching sessions can be scheduled	High
COACHING-TC-002	Verify feedback documentation	High
COACHING-TC-003	Verify improvement plans can be created	High
COACHING-TC-004	Verify coaching templates available	Medium
COACHING-TC-005	Verify performance tracking post-coaching	High

4.40 Ft Cs Csat Surveys

4.40.1 Priority

Must Have

4.40.2 User Story

As a CS manager, I want to send CSAT surveys so that I can measure service quality

4.40.3 Preconditions

Survey tool configured

4.40.4 Postconditions

Surveys sent, responses collected, CSAT calculated

4.40.5 Test Cases

Id	Description	Weight
CSAT-SURVEYS-TC-001	Verify survey sent post-interaction (SMS/email)	High
CSAT-SURVEYS-TC-002	Verify rating scale (1-5)	High
CSAT-SURVEYS-TC-003	Verify comments can be provided	High
CSAT-SURVEYS-TC-004	Verify survey response rate tracked	High
CSAT-SURVEYS-TC-005	Verify CSAT trend analysis	High

4.41 Ft Cs Nps Surveys

4.41.1 Priority

Should Have

4.41.2 User Story

As a CS manager, I want to measure NPS so that I can gauge customer loyalty

4.41.3 Preconditions

NPS survey tool configured

4.41.4 Postconditions

NPS surveys sent, NPS score calculated

4.41.5 Test Cases

Id	Description	Weight
NPS-SURVEYS-TC-001	Verify periodic surveys (quarterly/annual)	High
NPS-SURVEYS-TC-002	Verify 0-10 scale	High
NPS-SURVEYS-TC-003	Verify Promoter/Passive/ Detractor classification	High
NPS-SURVEYS-TC-004	Verify follow-up workflows	Medium
NPS-SURVEYS-TC-005	Verify NPS score calculated and tracked	High

4.42 Ft Cs Feedback Analysis

4.42.1 Priority

Must Have

4.42.2 User Story

As a CS manager, I want to analyze customer feedback so that I can identify improvement areas

4.42.3 Preconditions

Feedback collected

4.42.4 Postconditions

Feedback analyzed, insights generated

4.42.5 Test Cases

Id	Description	Weight
FEEDBACK-ANALYSIS-TC-001	Verify sentiment analysis performed	High

Id	Description	Weight
FEEDBACK-ANALYSIS-TC-002	Verify common themes identified	High
FEEDBACK-ANALYSIS-TC-003	Verify trends over time tracked	High
FEEDBACK-ANALYSIS-TC-004	Verify agent-level analysis available	High
FEEDBACK-ANALYSIS-TC-005	Verify category-level analysis available	High

4.43 Ft Cs Ticket Reports

4.43.1 Priority

Must Have

4.43.2 User Story

As a CS manager, I want ticket reports so that I can monitor workload and efficiency

4.43.3 Preconditions

Ticket data available

4.43.4 Postconditions

Reports generated showing volume and performance

4.43.5 Test Cases

Id	Description	Weight
TICKET-REPORTS-TC-001	Verify ticket volume by channel	High
TICKET-REPORTS-TC-002	Verify ticket volume by category	High
TICKET-REPORTS-TC-003	Verify ticket volume by priority	High
TICKET-REPORTS-TC-004	Verify resolution time tracked	High

Id	Description	Weight
TICKET-REPORTS-TC-005	Verify first-contact resolution tracked	High
TICKET-REPORTS-TC-006	Verify backlog shown	High
TICKET-REPORTS-TC-007	Verify aging tickets identified	High

4.44 Ft Cs Agent Performance

4.44.1 Priority

Must Have

4.44.2 User Story

As a CS manager, I want agent performance reports so that I can evaluate performance

4.44.3 Preconditions

Agent activity data available

4.44.4 Postconditions

Performance reports generated

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4.44.5 Test Cases

Id	Description	Weight
AGENT-PERFORMANCE-TC-001	Verify tickets handled per agent	High
AGENT-PERFORMANCE-TC-002	Verify average handle time per agent	High
AGENT-PERFORMANCE-TC-003	Verify resolution rate per agent	High
AGENT-PERFORMANCE-TC-004	Verify CSAT scores per agent	High
AGENT-PERFORMANCE-TC-005	Verify quality scores per agent	High
AGENT-PERFORMANCE-TC-006	Verify agent ranking available	Medium
AGENT-PERFORMANCE-TC-007	Verify performance trends tracked	High

4.45 Ft Cs Sla Reports

4.45.1 Priority

Must Have

4.45.2 User Story

As a CS manager, I want SLA compliance reports so that I can ensure commitments are met

4.45.3 Preconditions

SLA data tracked

4.45.4 Postconditions

SLA reports generated

4.45.5 Test Cases

Id	Description	Weight
SLA-REPORTS-TC-001	Verify compliance rate by SLA type	High
SLA-REPORTS-TC-002	Verify breaches by category	High
SLA-REPORTS-TC-003	Verify escalations tracked	High
SLA-REPORTS-TC-004	Verify SLA trends shown	High
SLA-REPORTS-TC-005	Verify root cause analysis available	Medium

4.46 Ft Cs Channel Analytics

4.46.1 Priority

Must Have

4.46.2 User Story

As a CS manager, I want channel analytics so that I can optimize channel strategy

4.46.3 Preconditions

Multi-channel data available

4.46.4 Postconditions

Channel analytics reports generated

4.46.5 Test Cases

Id	Description	Weight
CHANNEL-ANALYTICS-TC-001	Verify volume by channel	High
CHANNEL-ANALYTICS-TC-002	Verify response time by channel	High
CHANNEL-ANALYTICS-TC-003	Verify resolution time by channel	High
CHANNEL-ANALYTICS-TC-004	Verify customer preference tracked	High
CHANNEL-ANALYTICS-TC-005	Verify channel cost analysis available	Medium
CHANNEL-ANALYTICS-TC-006	Verify channel shift trends tracked	Medium

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4.47 Ft Cs Real Time Dashboard

4.47.1 Priority

Must Have

4.47.2 User Story

As a CS supervisor, I want real-time dashboard so that I can monitor operations

4.47.3 Preconditions

Real-time data streaming configured

4.47.4 Postconditions

Dashboard displays current metrics

4.47.5 Test Cases

Id	Description	Weight
REAL-TIME-DASHBOARD-TC-001	Verify current queue depth displayed	High
REAL-TIME-DASHBOARD-TC-002	Verify average wait time displayed	High
REAL-TIME-DASHBOARD-TC-003	Verify agents online displayed	High
REAL-TIME-DASHBOARD-TC-004	Verify active chats displayed	High
REAL-TIME-DASHBOARD-TC-005	Verify SLA at-risk tickets displayed	High
REAL-TIME-DASHBOARD-TC-006	Verify wallboard display mode available	Medium