

Synthetic Dataset – Product Feedback Email Threads

THREAD 01 – Sales dashboard (medium)

[EVENT: question_sent | timestamp: 2025-10-01 09:14:23 | actor: team_member | status: open]

From: "Ana Torres" <ana.torres@acme.com>
To: "Carlos López" <carlos.lopez@client.com>
Subject: Follow-up on your opinion about the new sales dashboard
Date: Wed, 01 Oct 2025 09:14:23 -0600

Hi Carlos,

This is Ana from the Acme Analytics product team 😊.

We'd love to hear your opinion about the new sales dashboard we released last week.

A few specific questions:

1. Is it easy for you to find the date and branch filters?
2. Do you feel the charts load quickly, or do they feel slow?
3. Is there any metric you miss on the main panel?

Any comment, even a short one, helps us a lot.

Thanks in advance!

Best,

Ana Torres

Product Specialist – Acme Analytics

[EVENT: customer_reply_received | timestamp: 2025-10-01 11:02:09 | actor: customer | status: pending]

From: "Carlos López" <carlos.lopez@client.com>
To: "Ana Torres" <ana.torres@acme.com>
Subject: Re: Follow-up on your opinion about the new sales dashboard
Date: Wed, 01 Oct 2025 11:02:09 -0600

Hi Ana,

To be honest I only started using it yesterday.

- I did see the filters, but the branch filter is a bit hidden, it took me a while to find it.
- About performance, some days it's fine and other days it feels “super slow” (I didn't measure, but it definitely feels slow).
- As for metrics, it might be useful to see the average ticket right on the main screen.

I haven't checked all the reports yet, so I might see more things later.

Regards,
Carlos

On Wed, Oct 1, 2025 at 9:14 AM, Ana Torres <ana.torres@acme.com> wrote:

> We'd love to hear your opinion about the new sales dashboard...

[EVENT: summary_forwarded_to_lead | timestamp: 2025-10-01 11:35:40 | actor: team_member | status: pending]

From: "Ana Torres" <ana.torres@acme.com>
To: "Laura Méndez" <laura.mendez@acme.com>
Subject: Feedback summary – Client Carlos López – Sales dashboard
Date: Wed, 01 Oct 2025 11:35:40 -0600

Hi Laura,

Here's a summary of the feedback from Carlos López (Retail Norte client) about the new dashboard:

- He can find the filters, but says the branch filter is “hidden”.
- He perceives intermittent performance: some days okay, other days “very slow” (no exact measurements).
- Suggests adding average ticket on the main screen.
- He hasn't checked all reports yet but says he'll keep testing.

Case status: open, waiting for your indication to close or follow up.

Best,
Ana

(Previous thread with the client attached)

[EVENT: lead_approved | timestamp: 2025-10-01 12:01:05 | actor: team_lead | status: closed]

From: "Laura Méndez" <laura.mendez@acme.com>
To: "Ana Torres" <ana.torres@acme.com>
Subject: Re: Feedback summary – Client Carlos López – Sales dashboard
Date: Wed, 01 Oct 2025 12:01:05 -0600

Thanks, Ana.

This level of detail is enough for now.

Let's add to the backlog:

- Improve visibility of the branch filter.
- Evaluate performance during peak hours.
- Add average ticket to the main panel.

You can close this case and move on to the next client.

Laura

On Wed, Oct 1, 2025 at 11:35 AM, Ana Torres <ana.torres@acme.com> wrote:

> Here's a summary of the feedback from Carlos López...

THREAD 02 – Mobile app push notifications (long with follow-up)

[EVENT: question_sent | timestamp: 2025-10-03 08:47:12 | actor: team_member | status: open]

From: "Diego Ramírez" <diego.ramirez@acme.com>
To: "Mariana Pérez" <mariana.perez@client.com>
Subject: Feedback about mobile app notifications
Date: Fri, 03 Oct 2025 08:47:12 -0600

Hi Mariana,

I'm Diego from the mobile product team.
We're reviewing the experience of push notifications in the app.

Could you help us by answering these questions?

1. On a normal day, how often do you receive notifications from us?
2. Do they feel useful or mostly “noise”?
3. Have you had any issues disabling or configuring them?

Whatever you can share is perfect, it doesn't have to be very detailed.

Best,
Diego

[EVENT: customer_reply_received | timestamp: 2025-10-03 13:19:03 | actor: customer | status: pending]

From: "Mariana Pérez" <mariana.perez@client.com>
To: "Diego Ramírez" <diego.ramirez@acme.com>
Subject: Re: Feedback about mobile app notifications
Date: Fri, 03 Oct 2025 13:19:03 -0600

Hi Diego,

I don't have the exact number, but I feel I get a lot of them.
Especially “cart reminder” and “deal of the day”, that's a bit annoying.

Configuring them is a bit confusing; I opened the menu and didn't really understand the difference between “alerts” and “important messages”. In the end I just turned almost everything off.

Not sure if I answered everything, but that's what I remember.

Mariana

On Fri, Oct 3, 2025 at 8:47 AM, Diego Ramírez <diego.ramirez@acme.com> wrote:
> On a normal day, how often do you receive notifications...?

[EVENT: summary_forwarded_to_lead | timestamp: 2025-10-03 14:02:55 | actor: team_member | status: pending]

From: "Diego Ramírez" <diego.ramirez@acme.com>
To: "José Martínez" <jose.martinez@acme.com>
Subject: Feedback summary – Push notifications – Client Mariana Pérez
Date: Fri, 03 Oct 2025 14:02:55 -0600

Hi José,

Here's the summary of Mariana Pérez's feedback on push notifications:

- She feels she gets “a lot” of notifications, especially cart reminders and daily promotions.
- She says the settings menu is confusing (doesn't understand “alerts” vs “important messages”).
- She ended up disabling almost everything out of frustration.

I suggest:

1. Reducing the frequency of marketing notifications for this segment.
2. Simplifying the settings menu with clearer labels.

Let me know if you want us to follow up.

Diego

[EVENT: lead_requested_followup | timestamp: 2025-10-03 14:25:31 | actor: team_lead | status: open]

From: "José Martínez" <jose.martinez@acme.com>
To: "Diego Ramírez" <diego.ramirez@acme.com>
Subject: Re: Feedback summary – Push notifications – Client Mariana Pérez
Date: Fri, 03 Oct 2025 14:25:31 -0600

Thanks, Diego.

Before making product decisions, please check whether the issue is consistent:

- Ask if the notifications that bother her most are every day or only during campaigns.
- Confirm whether she has ever considered uninstalling the app because of this.

After that, send me a brief follow-up summary.

José

[EVENT: followup_sent_to_customer | timestamp: 2025-10-03 15:02:10 | actor: team_member | status: pending]

From: "Diego Ramírez" <diego.ramirez@acme.com>
To: "Mariana Pérez" <mariana.perez@client.com>
Subject: Re: Feedback about mobile app notifications
Date: Fri, 03 Oct 2025 15:02:10 -0600

Hi again, Mariana,

Thanks a lot for your previous reply! Just a couple of quick follow-up questions:

1. Do you feel the annoying notifications come almost every day, or only during certain periods (for example, special promotions)?
2. Did you ever think about uninstalling the app because of this, or did you only disable notifications?

This helps us a lot to prioritize changes.

Best,
Diego

On Fri, Oct 3, 2025 at 1:19 PM, Mariana Pérez <mariana.perez@client.com> wrote:
> Configuring them is a bit confusing...

[EVENT: customer_followup_reply | timestamp: 2025-10-03 17:40:55 | actor: customer | status: pending]

From: "Mariana Pérez" <mariana.perez@client.com>
To: "Diego Ramírez" <diego.ramirez@acme.com>
Subject: Re: Feedback about mobile app notifications
Date: Fri, 03 Oct 2025 17:40:55 -0600

Hi Diego,

Quick answers:

1. I'd say it's almost daily, especially the cart reminders.
2. I haven't uninstalled the app, but I did think about it twice. In the end I preferred to turn notifications off because the app is useful for buying.

Hope this helps.

Mariana

[EVENT: summary_forwarded_to_lead | timestamp: 2025-10-03 18:05:12 | actor: team_member | status: pending]

From: "Diego Ramírez" <diego.ramirez@acme.com>
To: "José Martínez" <jose.martinez@acme.com>
Subject: Follow-up summary – Push notifications – Mariana Pérez
Date: Fri, 03 Oct 2025 18:05:12 -0600

Hi José,

Follow-up on Mariana's case:

- Annoying notifications: almost daily, especially cart reminders.
- She did consider uninstalling the app, but decided to disable notifications instead because the app is still useful for purchases.

I propose:

- Lower frequency of cart reminder notifications.
- Adjust segmentation so she doesn't get daily promotions.

Let me know your thoughts.

Diego

[EVENT: lead_approved | timestamp: 2025-10-03 18:21:47 | actor: team_lead | status: closed]

From: "José Martínez" <jose.martinez@acme.com>
To: "Diego Ramírez" <diego.ramirez@acme.com>
Subject: Re: Follow-up summary – Push notifications – Mariana Pérez
Date: Fri, 03 Oct 2025 18:21:47 -0600

Perfect, Diego.

This is enough.

I approve including this case in the Q4 notification strategy adjustments.

You can mark the case as closed.

José

THREAD 03 – Excel export (short, no team lead)

[EVENT: question_sent | timestamp: 2025-10-05 10:10:00 | actor: team_member | status: open]

From: "Sofía Herrera" <sofia.herrera@acme.com>
To: "Luis Gómez" <luis.gomez@client.com>
Subject: Opinion about the new Excel export
Date: Sun, 05 Oct 2025 10:10:00 -0600

Hi Luis,

We just released a new version of the Excel export in the reports module.

Could you briefly tell me:

1. If the file opens correctly in your version of Excel.
2. If the columns are clear or if you had to reorganize everything.

2–3 lines are perfect.

Best,
Sofía

[EVENT: customer_reply_received | timestamp: 2025-10-05 11:05:42 | actor: customer | status: closed]

From: "Luis Gómez" <luis.gomez@client.com>
To: "Sofía Herrera" <sofia.herrera@acme.com>
Subject: Re: Opinion about the new Excel export
Date: Sun, 05 Oct 2025 11:05:42 -0600

Hi,

The file opens fine, but the date format changes (it shows up as text).

The columns are clearer than before, I barely had to move anything.

From my side it's all good if you fix the date formatting.

Luis

On Sun, Oct 5, 2025 at 10:10 AM, Sofía Herrera <sofia.herrera@acme.com> wrote:
> Could you briefly tell me...?

THREAD 04 – Report module loading times (medium)

[EVENT: question_sent | timestamp: 2025-10-06 09:00:05 | actor: team_member | status: open]

From: "Miguel Pineda" <miguel.pineda@acme.com>
To: "Fernanda Díaz" <fernanda.diaz@client.com>
Subject: Follow-up on report loading times
Date: Mon, 06 Oct 2025 09:00:05 -0600

Hi Fernanda,

We heard that the reports module sometimes takes a long time to load in your account.

Could you let us know:

1. Approximately how long it takes to open your heaviest report.
2. Whether this happens only at certain times of day or all day long.
3. If other users on your team have mentioned the same issue.

Thanks for your help,

Miguel

[EVENT: customer_reply_received | timestamp: 2025-10-06 12:17:39 | actor: customer | status: pending]

From: "Fernanda Díaz" <fernanda.diaz@client.com>
To: "Miguel Pineda" <miguel.pineda@acme.com>
Subject: Re: Follow-up on report loading times
Date: Mon, 06 Oct 2025 12:17:39 -0600

Hi Miguel,

I haven't timed it, but the monthly sales report takes quite a while, I think more than 1 minute.

It happens mainly in the morning, when we open the whole system.

From the rest of the team, I know at least 2 people have complained, but I don't have their info handy.

Fernanda

[EVENT: summary_forwarded_to_lead | timestamp: 2025-10-06 13:05:00 | actor: team_member | status: pending]

From: "Miguel Pineda" <miguel.pineda@acme.com>
To: "Patricia León" <patricia.leon@acme.com>
Subject: Summary – Performance issue in reports – Client Fernanda Díaz
Date: Mon, 06 Oct 2025 13:05:00 -0600

Hi Patricia,

Summary of Fernanda Díaz's case (Ventas Sur client):

- Monthly sales report takes ~1 minute or more.

- It mainly happens in the morning.
- She says at least 2 other users have the same issue.

Suggestion: review logs between 8:00–10:00 and check if it's a usage peak issue.

Should we leave it like this or ask for additional follow-up?

Miguel

[EVENT: lead_approved | timestamp: 2025-10-06 13:25:12 | actor: team_lead | status: closed]

From: "Patricia León" <patricia.leon@acme.com>
To: "Miguel Pineda" <miguel.pineda@acme.com>
Subject: Re: Summary – Performance issue in reports – Client Fernanda Díaz
Date: Mon, 06 Oct 2025 13:25:12 -0600

Thanks, Miguel.

This level of detail is fine.

I'll prioritize it in the performance sprint, and we can close the case with the client (no extra follow-up needed for now).

Patricia

THREAD 05 – Advanced search (short with evasive answer)

[EVENT: question_sent | timestamp: 2025-10-07 15:10:44 | actor: team_member | status: open]

From: "Valeria Núñez" <valeria.nunez@acme.com>
To: "Roberto Aguilar" <roberto.aguilar@client.com>
Subject: Feedback about the new advanced search
Date: Tue, 07 Oct 2025 15:10:44 -0600

Hi Roberto,

A few days ago we released advanced search in the product catalog.

Has it been useful?

Is there anything that was hard to understand or use?

Best,
Valeria

[EVENT: customer_reply_received | timestamp: 2025-10-07 18:59:10 | actor: customer | status: closed]

From: "Roberto Aguilar" <roberto.aguilar@client.com>
To: "Valeria Núñez" <valeria.nunez@acme.com>
Subject: Re: Feedback about the new advanced search
Date: Tue, 07 Oct 2025 18:59:10 -0600

Hi,

I haven't used it much, I usually just search by code like before.

I tried the filters once, but honestly I didn't pay much attention.

When I have more time I'll take a better look.

Roberto

THREAD 06 – Support ticket panel (long)

[EVENT: question_sent | timestamp: 2025-10-08 09:30:00 | actor: team_member | status: open]

From: "Jorge Rojas" <jorge.rojas@acme.com>
To: "Lucía Ortega" <lucia.ortega@client.com>
Subject: Follow-up on the new ticket panel
Date: Wed, 08 Oct 2025 09:30:00 -0600

Hi Lucía,

I'm Jorge from the customer success team.
We recently activated the new support ticket panel in your account.

I'd like to know:

1. If the status of each ticket is clear (open, in progress, resolved).
2. If you can quickly find old tickets.
3. If anything has confused you or that you simply don't like.

Thanks for your time,
Jorge

[EVENT: customer_reply_received | timestamp: 2025-10-08 10:45:18 | actor: customer | status: pending]

From: "Lucía Ortega" <lucia.ortega@client.com>
To: "Jorge Rojas" <jorge.rojas@acme.com>
Subject: Re: Follow-up on the new ticket panel
Date: Wed, 08 Oct 2025 10:45:18 -0600

Hi Jorge,

Overall it looks better than before.
– The status is understandable, but sometimes I don't really know when a ticket is actually closed.
– It's hard for me to search for old tickets, the date filter is not very intuitive.
– What I don't like is that there are too many colors, I get a bit lost.

Lucía

[EVENT: summary_forwarded_to_lead | timestamp: 2025-10-08 11:20:40 | actor: team_member | status: pending]

From: "Jorge Rojas" <jorge.rojas@acme.com>
To: "Raúl Villalobos" <raul.villalobos@acme.com>
Subject: Summary – Ticket panel feedback – Lucía Ortega
Date: Wed, 08 Oct 2025 11:20:40 -0600

Hi Raúl,

Summary of Lucía's feedback:

- Ticket status is clear, but she can't easily tell when a ticket is really closed.
- Difficulty searching old tickets (date filter not intuitive).
- Too many colors in the panel; it's confusing for her.

Should we request follow-up or is this enough?

Jorge

[EVENT: lead_requested_followup | timestamp: 2025-10-08 11:45:03 | actor: team_lead | status: open]

From: "Raúl Villalobos" <raul.villalobos@acme.com>
To: "Jorge Rojas" <jorge.rojas@acme.com>
Subject: Re: Summary – Ticket panel feedback – Lucía Ortega
Date: Wed, 08 Oct 2025 11:45:03 -0600

Jorge,

Ask her for more detail about how she interprets the colors and what she'd expect to see to better distinguish closed tickets.

Then send me the updated summary.

Raúl

[EVENT: followup_sent_to_customer | timestamp: 2025-10-08 12:10:22 | actor: team_member | status: pending]

From: "Jorge Rojas" <jorge.rojas@acme.com>
To: "Lucía Ortega" <lucia.ortega@client.com>
Subject: Re: Follow-up on the new ticket panel
Date: Wed, 08 Oct 2025 12:10:22 -0600

Hi Lucía,

Thanks for your previous feedback 🙌.

Just to better understand:

1. When you say there are too many colors, which ones confuse you the most (for example, orange, purple, etc.)?
2. What would help you better distinguish tickets that are already closed? (icon, bigger label, extra column, etc.)

Your comments are very useful for us.

Best,
Jorge

[EVENT: customer_followup_reply | timestamp: 2025-10-08 13:05:10 | actor: customer | status: pending]

From: "Lucía Ortega" <lucia.ortega@client.com>
To: "Jorge Rojas" <jorge.rojas@acme.com>
Subject: Re: Follow-up on the new ticket panel
Date: Wed, 08 Oct 2025 13:05:10 -0600

Hi,

Mainly orange and purple look too similar, and I don't remember which one means "waiting for reply" and which one is "under review".

For closed tickets, I'd like them to show in a light gray and clearly say "CLOSED" instead of just an icon.

Lucía

[EVENT: summary_forwarded_to_lead | timestamp: 2025-10-08 13:40:32 | actor: team_member | status: pending]

From: "Jorge Rojas" <jorge.rojas@acme.com>
To: "Raúl Villalobos" <raul.villalobos@acme.com>
Subject: Follow-up – Ticket panel colors feedback – Lucía Ortega
Date: Wed, 08 Oct 2025 13:40:32 -0600

Raúl,

Follow-up from Lucía:

- Colors that confuse her most: orange and purple (she doesn't remember what each one means).
- She'd like closed tickets to be in light gray with an explicit "CLOSED" label.

I suggest adjusting the color palette and adding that textual label.

Jorge

[EVENT: lead_approved | timestamp: 2025-10-08 14:00:00 | actor: team_lead | status: closed]

From: "Raúl Villalobos" <raul.villalobos@acme.com>
To: "Jorge Rojas" <jorge.rojas@acme.com>
Subject: Re: Follow-up – Ticket panel colors feedback – Lucía Ortega
Date: Wed, 08 Oct 2025 14:00:00 -0600

Perfect.

Approved to include in the next UI iteration.

Thanks for the detailed follow-up.

Raúl

THREAD 07 – Billing module (medium, partial answer)

[EVENT: question_sent | timestamp: 2025-10-09 09:15:11 | actor: team_member | status: open]

From: "Elena Cruz" <elena.cruz@acme.com>
To: "Javier Ruiz" <javier.ruiz@client.com>
Subject: Feedback about the new billing module
Date: Thu, 09 Oct 2025 09:15:11 -0600

Hi Javier,

I'd like to hear about your experience with the new billing module:

1. Was it easy to create an invoice from scratch?
2. Did you get any errors when stamping or validating the tax ID?
3. Is there anything you would definitely change on the main screen?

Best regards,
Elena

[EVENT: customer_reply_received | timestamp: 2025-10-09 12:00:40 | actor: customer | status: pending]

From: "Javier Ruiz" <javier.ruiz@client.com>
To: "Elena Cruz" <elena.cruz@acme.com>
Subject: Re: Feedback about the new billing module
Date: Thu, 09 Oct 2025 12:00:40 -0600

Hi Elena,

Creating the invoice wasn't too bad, although at first I couldn't find where to set the payment method.
I barely had stamping errors, just once because I typed the tax ID wrong (my fault).

As for the main screen I'm not sure what to say, I just feel it's "a bit cluttered".

Javier

[EVENT: summary_forwarded_to_lead | timestamp: 2025-10-09 13:10:05 | actor: team_member | status: pending]

From: "Elena Cruz" <elena.cruz@acme.com>
To: "Teresa Cano" <teresa.cano@acme.com>
Subject: Summary – Billing module feedback – Javier Ruiz
Date: Thu, 09 Oct 2025 13:10:05 -0600

Hi Teresa,

Summary of Javier's case:

- He had trouble finding the payment method field when creating an invoice.
- Only one stamping error due to a mistyped tax ID (user error).

- He perceives the main screen as "a bit cluttered" but without specific details.

I suggest adding to the backlog: improve visibility of the payment method and simplify visual elements.

Is this enough for you?

Elena

[EVENT: lead_approved | timestamp: 2025-10-09 13:25:47 | actor: team_lead | status: closed]

From: "Teresa Cano" <teresa.cano@acme.com>
To: "Elena Cruz" <elena.cruz@acme.com>
Subject: Re: Summary – Billing module feedback – Javier Ruiz
Date: Thu, 09 Oct 2025 13:25:47 -0600

Yes, this is fine.

Approved as a usability improvement. Please document it and close the case.

Teresa

THREAD 08 – Offline inventory app (short, delayed reply)

[EVENT: question_sent | timestamp: 2025-10-10 16:25:00 | actor: team_member | status: open]

From: "Ricardo Salas" <ricardo.salas@acme.com>
To: "Paola Medina" <paola.medina@client.com>
Subject: Opinion about the offline inventory mode
Date: Fri, 10 Oct 2025 16:25:00 -0600

Hi Paola,

I'm Ricardo from the product team.
A few weeks ago we enabled the offline mode in the inventory app.

Has it worked well for you when you don't have a connection?
Have you lost any data during sync?

Regards,
Ricardo

[EVENT: customer_reply_received | timestamp: 2025-10-14 09:02:18 | actor: customer | status: closed]

From: "Paola Medina" <paola.medina@client.com>
To: "Ricardo Salas" <ricardo.salas@acme.com>
Subject: Re: Opinion about the offline inventory mode
Date: Tue, 14 Oct 2025 09:02:18 -0600

Hi Ricardo,

Sorry for replying so late, the email slipped my mind 😊.

I've used it a few times, and when I did, it did save the records and synced fine afterwards.
I only noticed that syncing is slow if I do a lot of movements (I didn't measure how much).

Paola

THREAD 09 – Integration API (medium, technical)

[EVENT: question_sent | timestamp: 2025-10-11 08:40:33 | actor: team_member | status: open]

From: "Ana Torres" <ana.torres@acme.com>
To: "Andrés Campos" <andres.campos@client.com>
Subject: Follow-up on the new integration API usage
Date: Sat, 11 Oct 2025 08:40:33 -0600

Hi Andrés,

We'd like to know how things went with the new version of our API for integrating with your ERP.

1. Were you able to implement the orders endpoint without issues?
2. Was the authentication documentation clear?
3. Anything that blocked you or made you waste time?

Best,
Ana

[EVENT: customer_reply_received | timestamp: 2025-10-11 11:01:10 | actor: customer | status: pending]

From: "Andrés Campos" <andres.campos@client.com>
To: "Ana Torres" <ana.torres@acme.com>
Subject: Re: Follow-up on the new integration API usage
Date: Sat, 11 Oct 2025 11:01:10 -0600

Hi Ana,

I implemented the orders endpoint, but I had to guess some fields because they weren't clearly documented. Authentication is fine, though the cURL example took me a bit to understand.

What took the most time was debugging a 400 error with no clear message.

Andrés

[EVENT: summary_forwarded_to_lead | timestamp: 2025-10-11 11:35:27 | actor: team_member | status: pending]

From: "Ana Torres" <ana.torres@acme.com>
To: "Laura Méndez" <laura.mendez@acme.com>
Subject: Summary – Integration API usage – Andrés Campos
Date: Sat, 11 Oct 2025 11:35:27 -0600

Hi Laura,

Summary of Andrés' feedback:

- Implemented the orders endpoint but had to guess some fields (incomplete documentation).
- Authentication OK, but cURL example not very clear.

- He lost time debugging a 400 error without a detailed message.

I propose:

- Completing the field descriptions in the docs.
- Improving error messages for 4xx codes.

Shall we leave it like this?

Ana

[EVENT: lead_approved | timestamp: 2025-10-11 11:50:00 | actor: team_lead | status: closed]

From: "Laura Méndez" <laura.mendez@acme.com>
To: "Ana Torres" <ana.torres@acme.com>
Subject: Re: Summary – Integration API usage – Andrés Campos
Date: Sat, 11 Oct 2025 11:50:00 -0600

Yes, Ana.

I approve adding these items to the technical documentation improvements and closing the case.

Laura

THREAD 10 – Branch performance report (short, 2 emails)

[EVENT: question_sent | timestamp: 2025-10-12 10:00:00 | actor: team_member | status: open]

From: "Sofía Herrera" <sofia.herrera@acme.com>
To: "Daniela Flores" <daniela.flores@client.com>
Subject: Feedback about the branch performance report
Date: Sun, 12 Oct 2025 10:00:00 -0600

Hi Daniela,

We want to know if the new branch performance report is helping you.

Do you find the comparisons between branches and productivity indicators clear?
Would you change anything about the format?

Best,
Sofía

[EVENT: customer_reply_received | timestamp: 2025-10-12 10:40:45 | actor: customer | status: closed]

From: "Daniela Flores" <daniela.flores@client.com>
To: "Sofía Herrera" <sofia.herrera@acme.com>
Subject: Re: Feedback about the branch performance report
Date: Sun, 12 Oct 2025 10:40:45 -0600

Hi Sofía,

Overall it's good. I'd only like to be able to sort branches by indicator (for example, from highest to lowest productivity).
Other than that, everything is clear.

Daniela

THREAD 11 – In-app help center (medium, vague answer)

[EVENT: question_sent | timestamp: 2025-10-13 09:05:12 | actor: team_member | status: open]

From: "Diego Ramírez" <diego.ramirez@acme.com>
To: "Sergio Navarro" <sergio.navarro@client.com>
Subject: Follow-up on the new in-app help center
Date: Mon, 13 Oct 2025 09:05:12 -0600

Hi Sergio,

We recently enabled the help center inside the app (FAQ, tutorials, etc.).

Have you used it?

If yes, did it help you solve your questions or did you still end up contacting support?

Thanks,
Diego

[EVENT: customer_reply_received | timestamp: 2025-10-13 15:30:02 | actor: customer | status: pending]

From: "Sergio Navarro" <sergio.navarro@client.com>
To: "Diego Ramírez" <diego.ramirez@acme.com>
Subject: Re: Follow-up on the new in-app help center
Date: Mon, 13 Oct 2025 15:30:02 -0600

Hi,

I glanced at it, but I almost always prefer to use the live chat.
I read one FAQ but then didn't keep going.

I'm not really sure if it helped me, to be honest.

Sergio

[EVENT: summary_forwarded_to_lead | timestamp: 2025-10-13 16:00:00 | actor: team_member | status: pending]

From: "Diego Ramírez" <diego.ramirez@acme.com>
To: "José Martínez" <jose.martinez@acme.com>
Subject: Summary – Help center usage – Sergio Navarro
Date: Mon, 13 Oct 2025 16:00:00 -0600

José,

Summary of Sergio's case:

- He just glanced at the help center, doesn't use it much.
- He prefers live chat.
- Not sure if it was useful; his answer is vague.

I suggest using this case as an example of low help center adoption.

Diego

[EVENT: lead_approved | timestamp: 2025-10-13 16:20:10 | actor: team_lead | status: closed]

From: "José Martínez" <jose.martinez@acme.com>
To: "Diego Ramírez" <diego.ramirez@acme.com>
Subject: Re: Summary – Help center usage – Sergio Navarro
Date: Mon, 13 Oct 2025 16:20:10 -0600

Thanks, Diego.

Approved.

Let's log this for our analysis of preferred channels (chat vs FAQ).

José

THREAD 12 – Date filters in financial dashboard (long, client error)

[EVENT: question_sent | timestamp: 2025-10-14 08:50:00 | actor: team_member | status: open]

From: "Valeria Núñez" <valeria.nunez@acme.com>
To: "Karla Jiménez" <karla.jimenez@client.com>
Subject: Feedback about the date filters in the financial dashboard
Date: Tue, 14 Oct 2025 08:50:00 -0600

Hi Karla,

I'd like to know how the new date filters in the financial dashboard are working for you.

1. Are they easy to understand (today, yesterday, last 7 days, custom range)?
2. Have you noticed any strange data when changing the date range?

Best,
Valeria

[EVENT: customer_reply_received | timestamp: 2025-10-14 09:25:17 | actor: customer | status: pending]

From: "Karla Jiménez" <karla.jimenez@client.com>
To: "Valeria Núñez" <valeria.nunez@acme.com>
Subject: Re: Feedback about the date filters in the financial dashboard
Date: Tue, 14 Oct 2025 09:25:17 -0600

Hi Valeria,

At first I thought the filter wasn't working because I didn't see any data, but I later realized I had set the range backwards (from 12/31 to 01/01).

Other than that, they're clear.

Once I thought data was missing, but I think it was because the day hadn't closed yet.

Karla

[EVENT: summary_forwarded_to_lead | timestamp: 2025-10-14 09:55:00 | actor: team_member | status: pending]

From: "Valeria Núñez" <valeria.nunez@acme.com>
To: "Teresa Cano" <teresa.cano@acme.com>
Subject: Summary – Date filters in financial dashboard – Karla Jiménez
Date: Tue, 14 Oct 2025 09:55:00 -0600

Hi Teresa,

Summary of Karla's case:

- At first she thought the filter was broken, but it was due to reversed dates (start/end inverted).
- After that, she understood it and finds it clear.

- Once she thought data was missing, but the day hadn't closed yet.

I suggest:

- Adding a validation when the start date is later than the end date.
- Showing a notice if the current day's data is still in progress.

Is this sufficient?

Valeria

[EVENT: lead_approved | timestamp: 2025-10-14 10:10:10 | actor: team_lead | status: closed]

From: "Teresa Cano" <teresa.cano@acme.com>
To: "Valeria Núñez" <valeria.nunez@acme.com>
Subject: Re: Summary – Date filters in financial dashboard – Karla Jiménez
Date: Tue, 14 Oct 2025 10:10:10 -0600

Yes, very clear.

Approved to include as a validation improvement in the backlog.

Teresa

THREAD 13 – Internal comments feature (short, 3 emails)

[EVENT: question_sent | timestamp: 2025-10-15 09:45:00 | actor: team_member | status: open]

From: "Miguel Pineda" <miguel.pineda@acme.com>
To: "Carlos López" <carlos.lopez@client.com>
Subject: Opinion about the new internal comments section
Date: Wed, 15 Oct 2025 09:45:00 -0600

Hi Carlos,

We added an internal comments section to each order (only visible to your team).

Have you used it?

If yes, does it help you coordinate better with your team, or do you barely use it?

Miguel

[EVENT: customer_reply_received | timestamp: 2025-10-15 10:20:30 | actor: customer | status: pending]

From: "Carlos López" <carlos.lopez@client.com>
To: "Miguel Pineda" <miguel.pineda@acme.com>
Subject: Re: Opinion about the new internal comments section
Date: Wed, 15 Oct 2025 10:20:30 -0600

Hi,

We use it only on some complicated orders.

It helps, but people sometimes prefer WhatsApp, it's already a habit.

Carlos

[EVENT: summary_forwarded_to_lead | timestamp: 2025-10-15 11:00:00 | actor: team_member | status: closed]

From: "Miguel Pineda" <miguel.pineda@acme.com>
To: "Patricia León" <patricia.leon@acme.com>
Subject: Summary – Internal comments – Client Carlos López
Date: Wed, 15 Oct 2025 11:00:00 -0600

Patricia,

Carlos uses internal comments only for complex orders, but the main channel is still WhatsApp.

I'm logging it as partial usage with no need for additional follow-up.

Miguel

THREAD 14 – Dark mode UI (medium with short follow-up)

[EVENT: question_sent | timestamp: 2025-10-16 08:35:00 | actor: team_member | status: open]

From: "Elena Cruz" <elena.cruz@acme.com>
To: "Mariana Pérez" <mariana.perez@client.com>
Subject: Feedback about the new dark mode
Date: Thu, 16 Oct 2025 08:35:00 -0600

Hi Mariana,

We enabled dark mode on the web platform.

Have you tried it?

Do you find it more comfortable than light mode, or you don't notice much difference?

Best,
Elena

[EVENT: customer_reply_received | timestamp: 2025-10-16 09:10:00 | actor: customer | status: pending]

From: "Mariana Pérez" <mariana.perez@client.com>
To: "Elena Cruz" <elena.cruz@acme.com>
Subject: Re: Feedback about the new dark mode
Date: Thu, 16 Oct 2025 09:10:00 -0600

Hi,

Yes, I tried it. I like it for working at night, but during the day I still use light mode.

One weird thing is that some tables look very high-contrast, it makes my eyes a bit tired.

Mariana

[EVENT: summary_forwarded_to_lead | timestamp: 2025-10-16 09:40:20 | actor: team_member | status: pending]

From: "Elena Cruz" <elena.cruz@acme.com>
To: "Teresa Cano" <teresa.cano@acme.com>
Subject: Summary – Dark mode – Mariana Pérez
Date: Thu, 16 Oct 2025 09:40:20 -0600

Teresa,

Mariana uses dark mode only at night; during the day she prefers light mode.

She says some tables have too strong a contrast and it tires her eyes.

I suggest reviewing the color palette for tables specifically.

Elena

[EVENT: lead_approved | timestamp: 2025-10-16 10:00:00 | actor: team_lead | status: closed]

From: "Teresa Cano" <teresa.cano@acme.com>
To: "Elena Cruz" <elena.cruz@acme.com>
Subject: Re: Summary – Dark mode – Mariana Pérez
Date: Thu, 16 Oct 2025 10:00:00 -0600

Agreed, Elena.

Approved for the next design iteration.

Please close the case.

Teresa

THREAD 15 – Pending task reminders (long, customer confusion)

[EVENT: question_sent | timestamp: 2025-10-17 09:00:00 | actor: team_member | status: open]

From: "Jorge Rojas" <jorge.rojas@acme.com>
To: "Luis Gómez" <luis.gomez@client.com>
Subject: Follow-up on pending task reminders
Date: Fri, 17 Oct 2025 09:00:00 -0600

Hi Luis,

We recently activated automatic pending task reminders in your account.

Have you been receiving them?

If yes, do they arrive at helpful times, or do you feel they're not very useful?

Best,
Jorge

[EVENT: customer_reply_received | timestamp: 2025-10-17 09:50:33 | actor: customer | status: pending]

From: "Luis Gómez" <luis.gomez@client.com>
To: "Jorge Rojas" <jorge.rojas@acme.com>
Subject: Re: Follow-up on pending task reminders
Date: Fri, 17 Oct 2025 09:50:33 -0600

Hi Jorge,

Yes, I get them, but I'm not really sure which task each reminder refers to.

It just says "You have pending tasks today", but I can't tell which ones.

So sometimes I ignore it because of that.

Luis

[EVENT: summary_forwarded_to_lead | timestamp: 2025-10-17 10:20:00 | actor: team_member | status: pending]

From: "Jorge Rojas" <jorge.rojas@acme.com>
To: "Raúl Villalobos" <raul.villalobos@acme.com>
Subject: Summary – Task reminders – Luis Gómez
Date: Fri, 17 Oct 2025 10:20:00 -0600

Raúl,

Luis receives the reminders, but he doesn't understand which tasks they refer to because the text is generic ("You have pending tasks today").

That's why he often ignores them.

I suggest asking him for more detail on what information he would like to see in the email.

Jorge

[EVENT: lead_requested_followup | timestamp: 2025-10-17 10:35:47 | actor: team_lead | status: open]

From: "Raúl Villalobos" <raul.villalobos@acme.com>
To: "Jorge Rojas" <jorge.rojas@acme.com>
Subject: Re: Summary – Task reminders – Luis Gómez
Date: Fri, 17 Oct 2025 10:35:47 -0600

Jorge,

Exactly, ask him for examples of what he'd like to see: task names, due dates, etc.
After that, send me the updated summary.

Raúl

[EVENT: followup_sent_to_customer | timestamp: 2025-10-17 11:05:10 | actor: team_member | status: pending]

From: "Jorge Rojas" <jorge.rojas@acme.com>
To: "Luis Gómez" <luis.gomez@client.com>
Subject: Re: Follow-up on pending task reminders
Date: Fri, 17 Oct 2025 11:05:10 -0600

Hi again, Luis,

To better understand how to improve the reminders:

1. Would it help if the email listed the names of the pending tasks?
2. Would you like to see the due date of each task in that same email as well?

With your input we can adjust the design.

Best,
Jorge

[EVENT: customer_followup_reply | timestamp: 2025-10-17 11:40:30 | actor: customer | status: pending]

From: "Luis Gómez" <luis.gomez@client.com>
To: "Jorge Rojas" <jorge.rojas@acme.com>
Subject: Re: Follow-up on pending task reminders
Date: Fri, 17 Oct 2025 11:40:30 -0600

Hi,

Yes, exactly that: show the task names and the due date, and if possible, the person responsible for each task.
That would make the emails more useful.

Luis

[EVENT: summary_forwarded_to_lead | timestamp: 2025-10-17 12:05:55 | actor: team_member | status: pending]

From: "Jorge Rojas" <jorge.rojas@acme.com>
To: "Raúl Villalobos" <raul.villalobos@acme.com>
Subject: Follow-up – Task reminders – Luis Gómez
Date: Fri, 17 Oct 2025 12:05:55 -0600

Raúl,

Follow-up on Luis' case:

- He wants the reminder to include the task name, due date, and responsible person.
- With that, he says he'd use the reminder emails more.

I propose updating the reminder templates with this information.

Jorge

[EVENT: lead_approved | timestamp: 2025-10-17 12:20:00 | actor: team_lead | status: closed]

From: "Raúl Villalobos" <raul.villalobos@acme.com>
To: "Jorge Rojas" <jorge.rojas@acme.com>
Subject: Re: Follow-up – Task reminders – Luis Gómez
Date: Fri, 17 Oct 2025 12:20:00 -0600

Perfect.

Approved for the next update to the email templates.

Case closed.

Raúl