Sequencing [1]	Req. Status	Design Status	Design Approved - Ready for Eng	Space Type	Use Case [2]	JTBDs	Agentic Value Prop	Tile Interface(s) Required	MCP Server(s) Required	Eng DRI (to Scope/Build)	Native Tool Usage [3]	Status	MCPs Created	Process Mapped	Designs Created	Functional	QA Complete	Live	Relevant Linear Issues
1	Approved	Done	☑	Support Agent Landing Page	Agent Status	* Advocate can see their current status * Advocate can change their Avail state: available lunch meeting non-core work on break technical issues training offline * Toggling to Available enables cases to be routed to the advocate * A routed case pops the case tile (see Support Cases) * This is a pinned tile		Salesforce?			N/A?			https://www.figma.com/design/HvbryXIxv0jIzQHYTbAJnh/Agent-Desktop?node-Id=529-60035&t=1izIAWpHhZZbDGE9-11				
2	Approved	Done	☑	Support Agent Landing Page	Support Cases (Messaging only)	* Show number of active support cases for an advocate Messaging channel only Concurrency is 3 max * Tile becomes active when advocate is in Available status * Tile shows number of active cases up to concurrency max * Once a case is routed, tile changes contextually to tell the advocate a new case has been assigned * Once case is assigned, clicking tile for the first case takes advocate to Case Landing Page * Second case assignment creates alert on all pages: 1 new case assigned * Second case assignment creates case tiles page * Clicking alert on any page takes advocate to case tiles page * Case tiles page includes one tile for each active case * Each case tile includes case summary title case summary customer name indicator showing if the advocate needs to respond or waiting on customer response once customer has responded, timer showing time since last advocate response visual element indicating if it is new since the advocate was last on this page channel for the case * Clicking a case tile loads the My Cases Landing Page for that case * Advocate can navigate back to case assignment page to review active assigned cases from the Case Landing Page * Advocate can navigate back to Agent Landing Page from case tiles page	* Save time managing multiple cases for Messaging advocates * Give advocates an easy, running start in a new case through the case summary tiles	Salesforce						https://www.figma.com/design/HvbryXIxv0jIzQHYTbAJnh/Agent-Desktop?node-Id=532-62248&t=EFhVzRNq3fAI5grz-11				
4	Approved	Done	☑	Support Agent Landing Page	Sev notifications	* Show only SEV information based on the advocates role and team * Show number of active SEVs impacting customers on a SEV summary tile inclusive of internal SEVs impacting Ops ability to work on cases, such as those impacting Toolbox or Regulator * Show number of SEVs resolved since the advocate's previous shift * Advocates can see number of each type of SEV in each category (XX SEV-0s, YY SEV-1s, etc.) * Clicking the SEV tile takes advocate to a My SEVs Page * My SEVs Page includes 1 tile for each SEV, organized by level of severity (SEV-0s at the top) Each SEV tile includes its title Each SEV tile indicates its severity level Each SEV tile includes a brief summary Status (Resolved, Active) Start timestamp Most recently updated timestamp * Clicking a SEV tile loads additional details if needed (not summarized within the normal-sized tile)	* Save time going through Slack channels and emails for Sev alerts * Increase precision by summarizing the critical details, providing status updates, and providing talking points	Connect to Cash sev jira board			Slack?			https://www.figma.com/design/HvbryXIxv0jIzQHYTbAJnh/Agent-Desktop?node-Id=472-52258&t=EFhVzRNq3fAI5grz-11				
3	In Progress	In Progress	☐	Support Agent Landing Page	Knowledge tile	* Show number of updates to policies relevant to the advocate Show the title of the knowledge article if number of updates is 1 Show a brief summary of the knowledge article of the number of updates is 1 Show the number of updates if 2+ (no title or summary) * If the number of updates since previous shift is 1, clicking the knowledge tile takes the advocate to the content site for the updated content * If the number of updates since previous shift is 2+, clicking the knowledge tile takes the advocate to a Knowledge Updates Page * Knowledge Landing Page includes 1 tile for each updated piece of content, organized by relevance (House or specialty specific updates should be higher priority) Each knowledge tile includes the content title Each knowledge tile indicates a brief summary Each knowledge tile is categorized as "Unread" or "Read" * "Unread" knowledge tiles show at the top * "Read" knowledge tiles load in a different section of the page, but are still accessible for 5 business days after having been flagged as "Read" * Clicking a knowledge takes the advocate to the content page for the updated content * Once an "Unread" knowledge tile is clicked through, the tile is marked as "Read" * Once a knowledge tile is marked as "Read," it moves to the "Unread" section of the Knowledge Updates Page	Give advocates a quick view into updates to content and policy, without requiring them to navigate away.	Notion, Toolbox/Contenful						https://www.figma.com/design/HvbryXIxv0jIzQHYTbAJnh/Agent-Desktop?node-Id=971-95488t=Ge3K4aQOzw8MB4wb-1				
		Done	☑	Support Agent Landing Page	Search box in footer	Bottom of page Reuse co-pilot logic													
5	In Progress	Missing Info	☐	Support Agent Landing Page	Metrics	* Advocate can click in to view their KPIs against benchmark/expectation * Metrics tile shows list of topline KPIs for the advocates team/role * Clicking the tile takes the advocate to a My Metrics Landing Page * My Metrics page includes 1 tile for each KPI Average Handle Time (Messaging) QA Evaluation Non-Acknowledged QA evaluations Average Messaging Assignment to Action (ATA) Adherence P0 Policy Violations P1 Policy Violations CSAT Resolution Rate Training completion (could move to training tile when we build it) Touches per Hour * Each metrics tile shows the advocate's current performance * Each metrics tile shows the metric and target for performance	Give advocates a snapshot of their performance against standards, without having to navigate outside the tool to two different sources.	Looker										
6	Approved	Done	☐	Support Agent Landing Page	General Tool Feedback	* Pick up from G2 * Broad based feedback. Not contextual. * Potentially feeds into a jira board for Product / Eng to review. * At a later time, we can address contextual in-line feedback.		Salesforce						https://www.figma.com/design/HvbryXIxv0jIzQHYTbAJnh/Agent-Desktop?node-Id=596-14491&t=vyf8uADqzG7dX4ez-11				

Case Landing Page

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	Approved	Done	☐	Support Case Landing Page	Agent Status (page header)	Same as above													
3	In Progress	In Progress	☐	Support Case Landing Page	Case summary tile	* Case Summary: Existing summary developed by the Co-pilot team gives advocates an up-to-date summary of the case so far, including from upstream Cashbot or other advocate interactions * Linked Cases: Relevant prior cases from the same customer for the same problem. * Linked Transactions: Transactions linked to the case either by the customer or by a previous advocate. * Tracked issues: List of the questions or issues the customer has asked about.													
2	In Progress	In Progress	☐	Support Case Landing Page	Customer tile	* Display Name * Legal Name * Relevant customer labels (e.g. denylisted) * Email * Phone number * Accounts: We need to see how many accounts the customer has, and advocates must be able to navigate between accounts. For each account, we should show: * $cashtag * BTC balance. We will display only those accounts with BTC balances by default, but we should show if the customer has other accounts. * Relevant account labels (e.g. EIDV, Risk status)		Will need CAP and Regulator MCPs. Or Transaction Store if we onboard BTC?											
1	In Progress	In Progress	☐	Support Case Landing Page	Conversation tile	* Existing messaging panel (remove QT search feature). Messaging BTC advocates can speak to a customer through this feature * Advocates receive Cashbot recommendations inline in the panel * Advocates can approve a Cashbot prompt, Decline it and fallback to existing tools, or Edit the response to customize it * If Cashbot does not have a recommendation prompt, advocates see a message to that effect * All responses are logged If approved, logged as "thumbs up" If declined, logged as "thumbs down" If edited, logged as "used with edits" or comparable (pending ML input), and all edits are captured * Advocate can toggle to wait for customer reply													
4	In Progress	In Progress	☐	Support Case Landing Page	Co-pilot tile	* Advocate asks questions about BTC policies and content * Can copy Co-pilot responses over to conversation tile													

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				Workflows															
	Not started		☐	Support Case Workflows	**Case closing**	Advocate receives a prompt to close case when all tracked issues have been answered Advocate can also manually move the case to resolved													
	Not started		☐	Support Case Workflows	**Case Transfer workflow**	* Advocate receives prompt to transfer a case if a customer has non-BTC questions * Prompt shows up in Conversation tile as a push recommendation * Recommended transfer queue?					Use new Cashbot transfer detection and filing flow, integrated into workspace								
	Not started		☐	Support Case Workflows	**Complaints filing workflow**	* Advocate proactively received prompt to confirm complaint filing if complaint language is detected * Prompt shows up in Conversation tile as a push recommendation * Complaint is summarized and advocate can submit the complaint					Use existing Complaints detection and filing, integrated into workspace								
	Not started		☐	Support Case Workflows	**BTC Withdrawals workflow**	* Advocate receives recommendations for policy and knowledge responses for withdrawal questions * Advocate receives recommendations for withdrawal related transaction status * Advocate can see if a withdrawal failed and why					Transaction Store, Toolbox, Regulator, Notion (BTC KAs are in Notion/Coda, not in CF1)								
	Not started		☐	Support Case Workflows	**BTC Deposits workflow**	* Advocate receives recommendations for policy and knowlede responses for deposit questions * Advocate receives recommendations for deposit related transaction statuses * Advocate can see if a deposit failed and why					Transaction Store, Toolbox, Regulator, Notion (BTC KAs are in Notion/Coda, not in CF1)								
	Not started		☐	Support Case Workflows	**Case Wrap up**	*Advocate sees case summary on moving to resolve replacing After Call Work * Advocate can edit or confirm as-is													
				Backlog - out of scope															
			☐	Support Agent Landing Page	**Leadership communications**	* Give advocates quick view of new critical leadership comms and how many * Click into tile gives advocates the summary of these critical comms, including a summary, from, and date * Clicking into a comm allows the advocate to read it in its entirety					Likely Gmail?								
			☐	Personal	**Calendar Agent**	Please use upcoming meetings file from G2 team													
			☐	Block-wide	**Training requirements**	* Give advocate quick view of new training materials to take * Advocate can click into the tile to see expanded list of materials * Advocate can click from the list to initiate the training					Workday								
	In Progress	Not started	☐	Support Agent Landing Page	**Weather Tile**	Show weather tile based on advocate location	Nice gesture and starts to feel friendly. When you click open Yahoo Weather Similar to iOS												

[1] Priority order for design team

[2] Short title of initiative

[3] What's the current user engagement for the native (non-agentic) tool experience