



PLATFORM HANDBOOK

Agent

Set when the AI agent answers, plan your team's shifts, and make sure every hour is covered.

Customer Admin

Supervisor

CSR

Contents

Overview

01 Schedule

- Read the Schedule page
 - Set your office hours and holidays
 - Change or delete an hours calendar
 - Choose how the AI agent answers a phone number
 - Set a weekly AI schedule
 - Add holidays to a weekly AI schedule
 - Add a time block that spans several days
 - Change or pause a time block
 - See each number's routing at a glance
-

02 Workforce

- Add a team
 - Add a CSR to the workforce
 - Change a CSR's team, skills or status
 - Create a skill
 - Schedule a CSR's shifts
 - Check that every hour is covered
 - Change or remove a shift
 - See your own schedule
-

[Quick reference](#) [Troubleshooting](#) [Glossary](#)

Overview

The **Agent** section of the left menu decides when your AI agent answers your phone numbers and who on your team is there to help it. It has three pages:

- **Schedule** holds your office hours and holidays, and shows how much of each phone number’s calls the AI agent takes at each time of day. We call this your AI hours.
- **Workforce** plans your team’s shifts beside the AI agent’s hours, so you can see at a glance that every hour of the day is covered.
- **Points of Contact** lists the phone numbers, text numbers and email addresses the AI agent answers. From here you open a phone number to change how the AI agent answers it.

ROLE	WHAT YOU DO IN THE AGENT SECTION
Customer Admin	Set office hours, holidays and AI hours. Choose how the AI agent answers each phone number. Add CSRs, teams and skills to the workforce, and plan shifts.
Supervisor	Read your AI hours. Plan and change shifts, and check coverage.
CSR	See your own schedule.

To get started, sign in to the Dial AI platform and find **Agent** in the left menu. You see the pages your role can use.

IMPORTANT Changes to AI hours, routing and skills apply to live calls as soon as you save. Make them outside your busiest times, then check the result on the **Schedule** page.

NOTE The **Schedule** page and its dialogs show times in your computer’s time zone. An hours-of-operation calendar keeps its own time zone. If your computer is set to a different zone from your office, the times on the page are converted for you.

Your Dial AI team sets up your phone numbers, text numbers and email addresses, and chooses the flow each one runs. To add a new number or change what the AI agent says on it, ask your Dial AI team.

01 Schedule

The **Schedule** page shows when the AI agent answers each phone number and what share of calls it takes. It also holds your office hours and holidays.

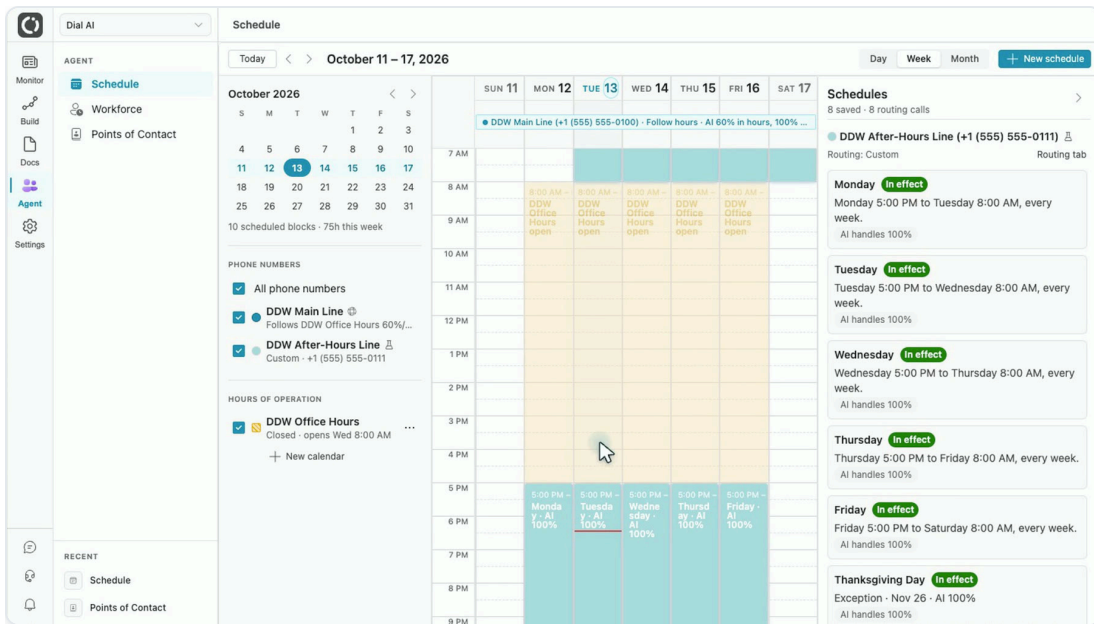
- 01 Read the Schedule page
- 02 Set your office hours and holidays
- 03 Change or delete an hours calendar
- 04 Choose how the AI agent answers a phone number
- 05 Set a weekly AI schedule
- 06 Add holidays to a weekly AI schedule
- 07 Add a time block that spans several days
- 08 Change or pause a time block
- 09 See each number's routing at a glance

Read the Schedule page

Use the Schedule page to answer one question quickly: is the AI agent taking calls on this number right now, and how many?

1. Select **Agent > Schedule**. A week calendar opens. The left rail shows a small month, **Phone numbers** and **Hours of operation**. The right panel lists **Schedules**.
2. In the **Phone numbers** rail, read the line under each number. It says how the number is routed, for example **Always on 100%**, **Custom**, or **Follows DDW Office Hours 60%/100%**.

- 3 To see fewer numbers, clear **All phone numbers**, then select the numbers you want, such as **DDW Main Line** and **DDW After-Hours Line**.
- 4 Read the calendar. A number that answers the same way all week shows one banner across the top, for example "DDW Main Line · Follow hours · AI 60% in hours, 100% outside". A number on its own schedule shows a colored block for each time window.
- 5 Point to a block. A tooltip shows the schedule name, the phone number and the share the AI agent handles.
- 6 Read the **Schedules** panel. Its header says how many schedules are saved and how many are routing calls. Each schedule has a badge.
- 7 In the toolbar, select **Day**, **Week** or **Month** to change the view. Select **Today** to come back to this week.



The Schedule page in Week view. DDW Main Line shows a Follow hours banner, DDW After-Hours Line shows its weeknight blocks, and the DDW Office Hours calendar is laid over the week.

BADGE	WHAT IT MEANS
In effect	This schedule decides how calls are routed during its time.
Disabled	The schedule is switched off. Open it to turn it back on.
Not in use	The phone number isn't on Custom schedule , so its schedules are kept but ignored.

TIP Under **Hours of operation**, select a calendar's checkbox to lay its open hours over the week. Gaps in the AI agent's hours then stand out.

NOTE **Month** is an overview. Select a day in it to open that week.

Set your office hours and holidays

An hours-of-operation calendar records when your office is open: weekly hours, holidays and days off, in one time zone. A phone number set to **Follow hours** uses it to change the AI agent's share when you close. The AI agent can also read it during a conversation, for example to check that your office is open before it offers a transfer.

- 1 Select **Agent > Schedule**.
- 2 In the left rail, under **Hours of operation**, select **New calendar**. The **New hours-of-operation calendar** dialog opens.
- 3 In **Name**, enter a clear name, such as "DDW Office Hours".

- 4 Optional: in **Description**, add a line such as "Customer service office, 200 Reservoir Way, Wrenford".
- 5 In **Time zone**, type the name of a city in your zone, such as "New York", and choose it from the list.
- 6 Under **Weekly hours**, set Monday's **From** and **To** times. A new calendar starts at Monday to Friday, 9:00 a.m. to 5:00 p.m. For Dial District Water, set Monday's **From** to 8:00 a.m.
- 7 Select **Apply Monday to weekdays**. Tuesday to Friday change to match. Saturday and Sunday stay **Closed**.
- 8 Read **What the agent sees** on the left. It repeats your hours in plain words, for example "DDW Office Hours hours: Monday to Friday 8:00 AM to 5:00 PM." This is what the AI agent reads.

New hours-of-operation calendar

Name * 1
DDW Office Hours

Description
Customer service office, 200 Reservoir Way, Wrenford

Time zone 2
Eastern Time — New York (UTC-4)

WHAT THE AGENT SEES
DDW Office Hours hours: Monday to Friday 8:00 AM to 5:00 PM.
Customer service office, 200 Reservoir Way, Wrenford
Next closure: Columbus Day · Oct 12

Weekly hours 4
Apply Monday to weekdays Copy Monday to all days Clear all

Day	Open	From	To	Overnight
Monday	☒	8:00 AM	5:00 PM	☐
Tuesday	☒	8:00 AM	5:00 PM	☐
Wednesday	☒	8:00 AM	5:00 PM	☐
Thursday	☒	8:00 AM	5:00 PM	☐
Friday	☒	8:00 AM	5:00 PM	☐
Saturday	☐ Closed			
Sunday	☐ Closed			

The New hours-of-operation calendar dialog with the name, the time zone, What the agent sees, and weekly hours of 8:00 a.m. to 5:00 p.m. on weekdays.

- 9 Scroll down to **Closures (holidays and days off)**. A new calendar already lists the US federal holidays for the rest of this year and all of next year.
- 10 Remove the holidays your office works. Select **Remove closure** (the trash icon) on each one. Dial District Water works on Columbus Day and Veterans Day, for example.
- 11 To add a day off of your own, select **Add closure**. A new row appears.
- 12 In the new row, enter a name, such as "Day after Thanksgiving", and pick the date. Leave **All day** on.
- 13 Repeat steps 11 and 12 for each day off, such as Christmas Eve.
- 14 Select **Create calendar**. The calendar appears in the rail with its live status, such as "Open · closes 5:00 PM".

Name	Dates	All day	Times
2026			
Thanksgiving Day	Nov 26, 2026 - Nov 26, 2026	☒	
Day after Thanksgiving	Nov 27, 2026 - Nov 27, 2026	☒	
Christmas Eve	Dec 24, 2026 - Dec 24, 2026	☒	
Christmas Day	Dec 25, 2026 - Dec 25, 2026	☒	
2027			
New Year's Day	Jan 1, 2027 - Jan 1, 2027	☒	
Memorial Day	May 31, 2027 - May 31, 2027	☒	
Independence Day	Jul 5, 2027 - Jul 5, 2027	☒	
Labor Day	Sep 6, 2027 - Sep 6, 2027	☒	
Thanksgiving Day	Nov 25, 2027 - Nov 25, 2027	☒	
Christmas Day	Dec 24, 2027 - Dec 24, 2027	☒	
New Year's Day	Dec 31, 2027 - Dec 31, 2027	☒	

Mon-Fri · 5 open days · 11 closures

[Cancel](#) [Create calendar](#)

The Closures section with the Day after Thanksgiving and Christmas Eve added, the All day switches, and the Create calendar button.

TIP For an early close, such as 2:00 p.m. on Christmas Eve, turn off **All day** on that row and set the times.

TIP Each new year, open the calendar and select **Add US federal holidays**. It adds only the holidays the list doesn't have yet. Then remove the ones your office works.

Change or delete an hours calendar

- 1 Select **Agent > Schedule**.
- 2 In the **Hours of operation** rail, select **Actions for** (the ... button) beside the calendar, then **Edit**.
- 3 Make your changes, then select **Save calendar**.

IMPORTANT **Delete** in the same menu removes the calendar after you confirm. Phone numbers and conversations that use it can no longer find it, and a **Follow hours** number that loses its calendar gives the AI agent its "closed" share all the time.

Choose how the AI agent answers a phone number

Each phone number has a routing mode. It decides what share of calls the AI agent takes, and when. Calls it doesn't take go to the number's fallback contact, a number from your Contact Book.

ROUTING MODE	WHAT IT DOES	USE IT WHEN
Always on	The AI agent takes one fixed share of calls all day.	The AI agent answers around the clock at one level. Set 0% to send every call to the fallback contact.
Follow hours	The AI agent takes one share while your office is open and another while it's closed. Closures in the calendar count as closed.	Your staffing follows your office hours. This is the simplest choice for most utilities.
Custom schedule	You choose the AI agent's hours and share for each day. Outside those windows, every call goes to the fallback contact.	The AI agent covers only certain times, such as nights.

Dial District Water runs its main line on **Follow hours**: the AI agent takes 60% of calls while the office is open and every call while it's closed.

- 1 Select **Agent > Points of Contact**. The **Phone** tab lists your phone numbers.
 - 2 On the number's row, select the pencil icon in the **Edit** column. The phone number's page opens.
 - 3 Select the **Routing** tab. The **How the AI answers** card shows the three modes.
 - 4 Select **Follow hours**. Its settings open under it.
 - 5 In **Calendar**, choose your hours calendar, such as **DDW Office Hours**. A line under it repeats the calendar's hours.
 - 6 Set **AI share when open**, for example to 60%. Your team takes the rest of the calls while you're open.
- IMPORTANT** If you set **AI share when closed** below 100%, a warning appears. That share of callers goes to your fallback contact while the office is closed. Only lower it if someone answers that line after hours.
- 7 Set **AI share when closed**, usually to 100%. The AI agent then takes every call at night, on weekends and on your closures.
 - 8 Read the line under the sliders. It says what callers get right now, for example "Right now: open (closes 5:00 PM) → the AI takes 60% of calls."
 - 9 Under **Fallback contact**, check the contact that gets the calls the AI agent doesn't take, such as **Customer Service Team**.
 - 10 At the bottom of the page, select **Save**. The bar changes from "Unsaved changes" to "All changes saved".

☐ Always on
The AI takes a fixed share of calls, all day.

1 ☒ Follow hours
One share when open, another when closed.

2 Calendar
DDW Office Hours
DDW Office Hours hours (ET): Monday to Friday 8:00 AM to 5:00 PM.

3 AI share when open: 60%
AI share when closed: 100%
Right now: open (closes 5:00 PM) → the AI takes 60% of calls.

☐ Custom schedule
Choose the AI's hours and share for each day.

4 Fallback contact
Calls the AI doesn't take go here.
Customer Service Team — +15555550101

Unsaved changes Discard **5** Save

The Routing tab with Follow hours selected, the DDW Office Hours calendar, AI share when open at 60%, AI share when closed at 100%, the fallback contact and the Save button.

NOTE If **Follow hours** is grayed out, you don't have an hours calendar yet. Select **Set hours of operation** under it to create one, then come back.

TIP To send every call to your team for a while, choose **Always on** and set **AI share** to 0%. Set it back when you're ready.

Set a weekly AI schedule

Use **Custom schedule** when the AI agent covers only part of the week. Dial District Water's after-hours line works this way: the AI agent answers it from 5:00 p.m. to 8:00 a.m. on weeknights. At other times, calls go to Field Services Dispatch.

- 1** Select **Agent > Points of Contact**, then the pencil icon in the **Edit** column of the number's row. Select the **Routing** tab.
- 2** Under **How the AI answers**, select **Custom schedule**. Two buttons appear: **Edit schedule** and **Advanced editor**.
- 3** Select **Edit schedule**. The **Weekly AI schedule** dialog opens. It shows the phone number, the time zone and a row for each day.
- 4** In **Default AI handle %**, enter the share the AI agent should take, such as 100. Each day you turn on starts at this share.
- 5** On the **Monday** row, turn on the switch. The row fills in 5:00 p.m. to 8:00 a.m., with **ends next day** selected.

- 6 Change **From** or **To** if your hours differ.
- 7 Select **Apply Monday to weekdays**. Tuesday to Friday get the same window.
- 8 Read **What callers get**. It describes the result in plain words, for example "AI answers Monday to Friday 5:00 PM to 8:00 AM the next day (100% of calls). Other times, calls transfer to Field Services Dispatch."
- 9 Select **Save schedule**. The dialog closes.
- 10 At the bottom of the page, select **Save** to keep the routing mode. The bar shows "All changes saved".

Weekly AI schedule

Phone number
+1 555 555 0111

Time zone
America/New_York
Every window below is saved as a wall-clock time in this zone.

1 **Default AI handle %**
100 [Apply to all days](#)
Seeds a day you switch on; each day keeps its own percentage after that.

5 **WHAT CALLERS GET**
AI answers Monday to Friday 5:00 PM to 8:00 AM the next day (100% of calls).
Other times, calls transfer to Field Services Dispatch.

Weekly AI windows

Start from **Apply Monday to weekdays** [Copy Monday to all days](#) [Clear all](#)

Shaded behind the bars: DDW Office Hours open hours.

Day	From	To	Ends next day	AI %
Monday	5:00 PM	8:00 AM	☒ ends next day	100
Tuesday	5:00 PM	8:00 AM	☒ ends next day	100
Wednesday	5:00 PM	8:00 AM	☒ ends next day	100
Thursday	5:00 PM	8:00 AM	☒ ends next day	100
Friday	5:00 PM	8:00 AM	☒ ends next day	100
Saturday	☐ No AI — every call transfers to the fallback contact			
Sunday	☐ No AI — every call transfers to the fallback contact			

The Weekly AI schedule dialog with weeknight windows from 5:00 p.m. to 8:00 a.m., ends next day selected, 100% on each day, and the What callers get summary.

IMPORTANT On **Custom schedule**, the AI agent takes 0% of calls outside your windows. A day you leave off sends every call to the fallback contact. Check **What callers get** before you save.

TIP If a number already has time blocks, the **Schedules** panel on the **Schedule** page links straight to its routing: **Change routing**, or **Routing tab** for a number already on **Custom schedule**.

TIP **Start from** fills the whole week for you, from one of your hours calendars or from a **Blank week**. It asks before it replaces your rows, and it leaves your exceptions alone.

NOTE The weekly editor holds one window per day. For two windows on one day, or one window that runs across several days, use the **Advanced editor** or the **Schedule** page. After that, **Edit schedule** is grayed out for this number, and the caption under the buttons says why. Make later changes in the **Advanced editor**.

Add holidays to a weekly AI schedule

A number on **Custom schedule** doesn't know about your holidays. If the AI agent should answer it all day on a holiday, add the day as an exception.

- 1 Open the number's **Routing** tab. On the **Schedule** page, select **Routing tab** beside the number in the **Schedules** panel. You can also go through **Agent > Points of Contact** and the pencil icon on the number's row.
- 2 Select **Edit schedule**. The **Weekly AI schedule** dialog opens.
- 3 Scroll down to **Exceptions (specific dates)**.
- 4 Select **Add exception**. A new row appears.
- 5 In the new row, enter a name, such as "Christmas Day", and pick the date. Leave **All day** on.
- 6 In **AI %**, enter the share the AI agent should take that day, such as 100.
- 7 Repeat steps 4 to 6 for each holiday.
- 8 Select **Save schedule**. The AI agent now covers the line on those days.

Sunday ☐ No AI — every call transfers to the fallback contact

Exceptions (specific dates) Add US federal holidays + Add exception

Name	Dates	All day	Times	AI %
2026				
Thanksgiving Day	Nov 26, 2026 — Nov 26, 2026	☒		100
Day after Thanksgiving	Nov 27, 2026 — Nov 27, 2026	☒		100
Christmas Eve	Dec 24, 2026 — Dec 24, 2026	☒		100
Christmas Day	Dec 25, 2026 — Dec 25, 2026	☒		100

Mon–Fri · 5 scheduled days · avg 100% AI · 4 exceptions

Cancel Save schedule

The Exceptions section with Thanksgiving Day, Day after Thanksgiving, Christmas Eve and Christmas Day, each all day at 100%, and the Save schedule button.

TIP **Add US federal holidays** adds the year's federal holidays as exceptions in one step. Remove the ones you don't need.

NOTE Two exceptions can't cover the same time. If a row says it overlaps another, change one of the dates or remove one row.

Add a time block that spans several days

The **Schedule** page can add a weekly window of any length, including one the weekly editor can't hold, such as a weekend from Friday evening to Monday morning.

IMPORTANT A number's time blocks route calls only while the number is on **Custom schedule**. If you pick a number on another mode, the dialog shows "Won't route calls yet". Change its routing first.

- 1 Select **Agent > Schedule**, then select **New schedule** in the toolbar. The **Add Schedule** dialog opens. Times are in your computer's time zone.
- 2 In **Phone Number**, choose the number.
- 3 In **Name**, enter what the window is for, such as "Weekend".
- 4 Set **AI Handle Percentage** with the slider, such as 100%. The rest of the calls go to the fallback contact.
- 5 Under **Time Block**, set **From**: **Day** Friday, **Time** 5:00 p.m.
- 6 Set **To**: **Day** Monday, **Time** 8:00 a.m.
- 7 Under **Status**, make sure **Enabled** is selected.
- 8 Select **Add**. The message "Created schedule" appears. The block shows on the calendar, and the **Schedules** panel shows it as **In effect**.

The screenshot shows the 'Add Schedule' dialog box. It has a title bar 'Add Schedule' and a subtitle 'Choose a weekly time block from a start day/time to an end day/time. It repeats every week. Example: Saturday 5:00 PM to Monday 8:00 AM. Times are in your time zone (America/New_York)'. Below this are fields for 'Phone Number' (DDW After-Hours Line (+1 (555) 555-0111)), 'Name' (Weekend), 'AI Handle Percentage' (a slider set to 100%), 'Time Block' (From: Day Friday, Time 05:00 PM; To: Day Monday, Time 08:00 AM), and 'Status' (Enabled). At the bottom are 'Cancel' and 'Add' buttons. Numbered callouts 1 through 5 point to the AI Handle Percentage slider, the 'From' time block fields, the 'To' time block fields, the 'Status' checkbox, and the 'Add' button respectively.

The Add Schedule dialog for DDW After-Hours Line with a Weekend block from Friday 5:00 p.m. to Monday 8:00 a.m. at 100%, and Enabled selected.

TIP In **Day** or **Week** view, drag across empty time on the calendar to open **Add Schedule** with those times filled in. A drag can't make a block of 24 hours or more. For a longer block, use **New schedule**.

Change or pause a time block

- 1 On **Agent > Schedule**, select the block on the calendar, or its card in the **Schedules** panel. The **Edit Schedule** dialog opens.
- 2 Change the name, the share or the times. To pause the block and keep it for later, clear **Enabled**.
- 3 Select **Save**. The message "Updated schedule" appears. A paused block shows the **Disabled** badge.

TIP You can also drag a block to move it. Nothing is saved until you select **Save**.

IMPORTANT **Delete** in the **Edit Schedule** dialog removes the block for good after you confirm. Pause a block instead if you might need it again.

NOTE A holiday exception from the weekly editor also shows on the calendar. Selecting it sends you to the number's **Routing** tab, because you change exceptions with **Edit schedule**.

See each number's routing at a glance

- 1 Select **Agent > Points of Contact**. The **Phone** tab opens.
- 2 Read each row:
 - **Flow** is what the AI agent follows on that number.
 - **AI Handle / Mode** shows the routing, such as **Always on (100%)**, **Follows hours (60% / 100%)** or **Custom**.
 - **Fallback Contact** shows the Contact Book name and number that gets the calls the AI agent doesn't take.
- 3 To change a number's routing, select the pencil icon in its **Edit** column, then the **Routing** tab.

02 Workforce

Workforce plans your team's shifts beside your AI hours. On the Workforce pages, **agents** are the members of your team who appear on the schedule, such as your CSRs. Everywhere else, and in this handbook, "agent" or "the virtual agent" means the AI agent.

01 Add a team

02 Add a CSR to the workforce

03 Change a CSR's team, skills or status

04 Create a skill

05 Schedule a CSR's shifts

06 Check that every hour is covered

07 Change or remove a shift

08 See your own schedule

Add a team

Teams group people in the planner and give their rows a color.

1. Select **Agent > Workforce**, then the **Admin** tab. The **Workforce admin** page shows **Teams** and **Agents**.
2. Under **Teams**, select **Add team**. The **Add team** dialog opens.

3 In **Team name**, enter the team's name, such as "Water Quality".

4 In **Color**, choose a color, such as **Teal**. It shows as a swatch on this team's rows in the planner.

5 Select **Create**. The team appears in the **Teams** table.

IMPORTANT The trash icon on a team deletes it at once, with no confirmation. Everyone on that team is left with no team.

Add a CSR to the workforce

Before you can schedule someone, add them to the workforce and put them on a team. You can add only people who already have a platform sign-in.

1 Select **Agent > Workforce**, then the **Admin** tab.

2 Under **Agents**, select **Add agent**. The **Add agent** dialog opens.

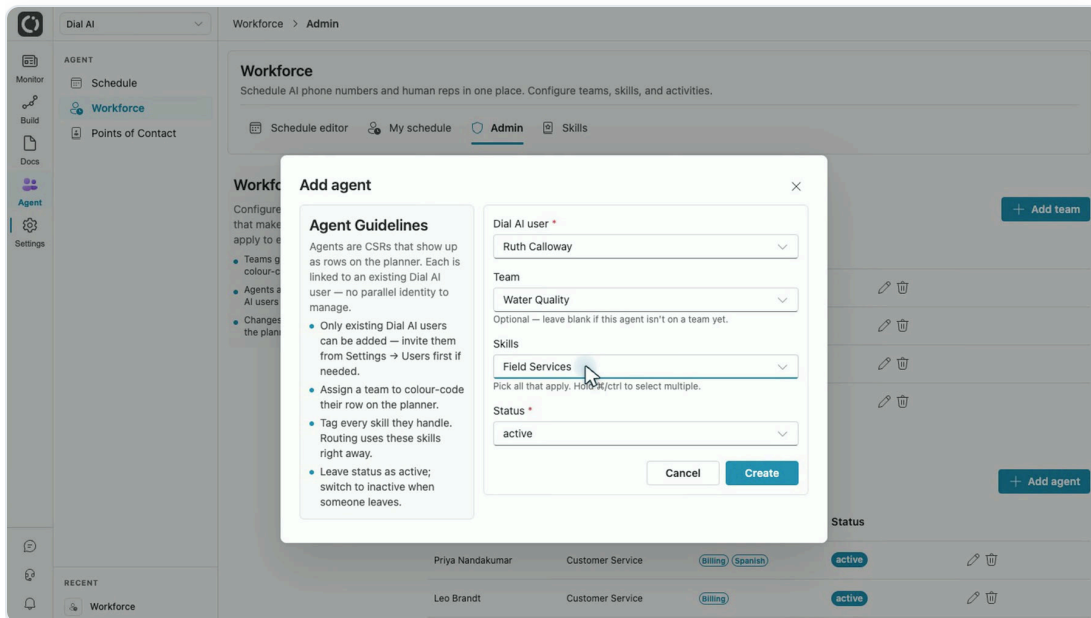
3 In **Dial AI user**, choose the person, such as **Ruth Calloway**. **Skills** fills in with the skills they already have.

4 In **Team**, choose their team, such as **Water Quality**.

IMPORTANT Skills apply to routing as soon as you save. Conversations that need a skill go to people who have it.

5 In **Skills**, choose every skill they handle. Hold Ctrl (⌘ on a Mac) to choose more than one.

- 6 Leave **Status** as **active**.
- 7 Select **Create**. The person appears in the **Agents** table with their team, skills and status.



The Add agent dialog for Ruth Calloway, with the Water Quality team, a skill and the active status filled in.

NOTE If someone is missing from **Dial AI user**, add them in **Settings > Users** first.

Change a CSR's team, skills or status

- 1 Select **Agent > Workforce**, then the **Admin** tab.
- 2 In the **Agents** table, select the pencil icon on the person's row. The **Edit agent** dialog opens.
- 3 Change their **Team**, **Skills** or **Status**, then select **Save**.

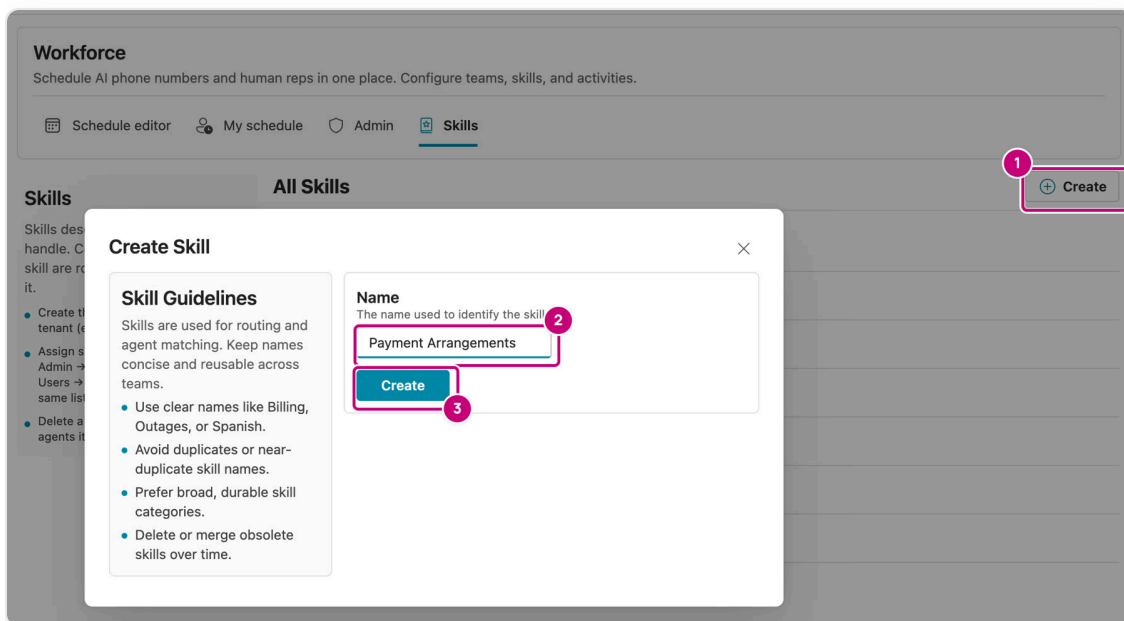
TIP When someone leaves, set **Status** to **inactive**. They drop off the planner and stay in your records.

IMPORTANT The trash icon on a person's row deletes them at once, with no confirmation. Set them to **inactive** instead.

Create a skill

Skills describe what someone on your team can handle, such as billing or field work. Conversations that need a skill go to people who have it.

- 1 Select **Agent > Workforce**, then the **Skills** tab. The **All Skills** list appears.
- 2 Select **Create**. The **Create Skill** dialog opens.
- 3 In **Name**, enter the skill, such as "Payment Arrangements".
- 4 Select **Create**. The skill appears in **All Skills**.
- 5 Give the skill to the right people on the **Admin** tab, in each person's **Skills** field.



The Skills tab with the Create Skill dialog open and the name Payment Arrangements entered.

TIP Keep skill names short and broad, like Billing, Spanish or Field Services. Avoid near-duplicates.

IMPORTANT **Delete skill** (the trash icon) deletes the skill at once, with no confirmation, and removes it from everyone who has it.

NOTE Skills are the same list as the one in **Settings > Users > Status & CSR**. A change in either place shows in both.

Schedule a CSR's shifts

The **Schedule editor** is a day planner. The AI agent's phone numbers sit at the top. Your team appears below, each person with their team.

- 1 Select **Agent > Workforce**. The **Schedule editor** tab opens on today, in **Day** view.
- 2 Use the arrows (**Previous day** and **Next day**) to go to the first day of the shift, such as next Monday.
- 3 On the person's row, select the empty space at the start time, such as 8:00 a.m. The **Add activity** dialog opens with a one-hour slot.
- 4 Check that **Agent** shows the right person.
- 5 In **Activity**, choose **Shift**.
- 6 Set **Start** and **End**, such as 8:00 a.m. and 5:00 p.m.
- 7 If the shift repeats, select **Repeat weekly**. More fields appear, and **Date** becomes **First occurrence**.
- 8 Under **Days of week**, select each day the shift happens, such as **Mon to Fri**.
- 9 Under **Ends**, leave **Never (indefinite)**, or choose **On date** and pick the last day.
- 10 Select **Create**. The shift appears on the person's row for each day you chose.

The screenshot shows the 'Add activity' dialog box. It contains the following fields and options:

- Agent ***: A dropdown menu showing 'Priya Nandakumar'.
- Activity ***: A dropdown menu with 'Shift' selected. A pink box and number 1 highlight this field.
- First occurrence ***: A date field showing '2026-10-12'. A pink box and number 2 highlight this field.
- Start *** and **End ***: Time fields showing '08:00 AM' and '05:00 PM' respectively. A pink box and number 3 highlight these fields.
- Repeat weekly**: A checked checkbox. A pink box and number 4 highlight this checkbox.
- Days of week**: A row of checkboxes for 'Mon', 'Tue', 'Wed', 'Thu', 'Fri', 'Sat', and 'Sun'. 'Mon' through 'Fri' are checked. A pink box and number 4 highlight this section.
- Ends**: Two radio button options: 'Never (indefinite)' (selected) and 'On date'.
- Cancel** and **Create** buttons at the bottom. A pink box and number 5 highlight the 'Create' button.

At the bottom of the dialog, there is a small note: 'One row per series — occurrences are computed at read time, not stored individually.'

The Add activity dialog with Shift, 8:00 a.m. to 5:00 p.m., Repeat weekly, and Monday to Friday selected.

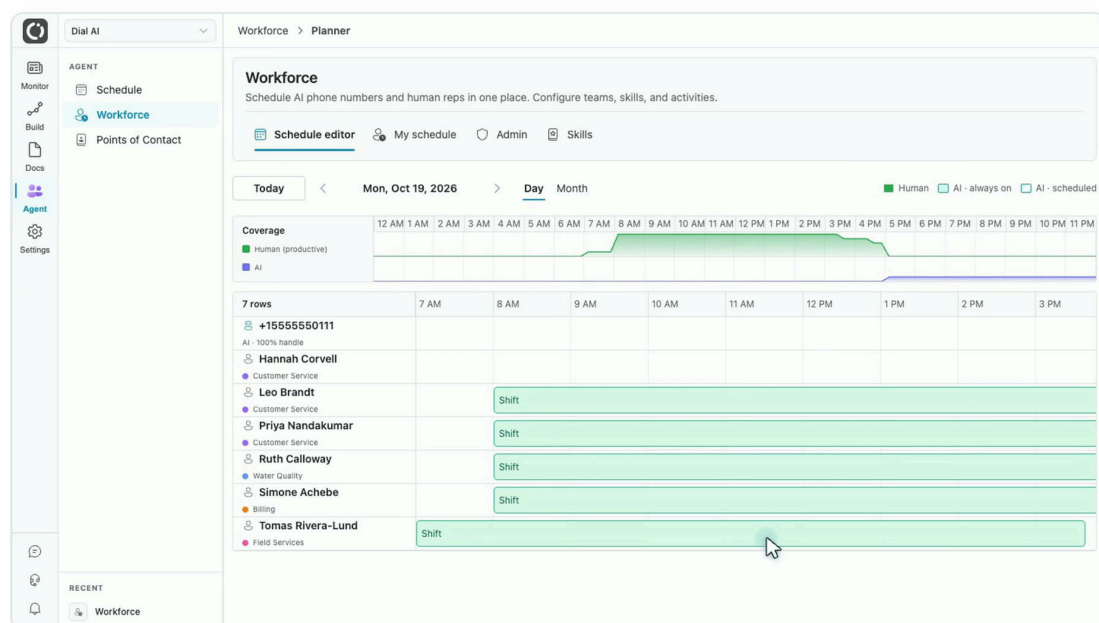
The activities are **Shift**, **Break**, **Lunch**, **Meeting** and **Training**. Only **Shift** and **Meeting** count toward human coverage.

TIP A **Lunch** or **Break** placed on top of a **Shift** doesn't lower the coverage line. To show a lunch gap, schedule the shift in two parts with the lunch between them, such as 8:00 a.m. to 12:00 p.m. and 1:00 p.m. to 5:00 p.m.

Check that every hour is covered

The **Coverage** strip at the top of the planner shows how many people and AI phone numbers are working through the day. Use it to find hours when nobody is on.

- 1 Select **Agent > Workforce**. The **Schedule editor** opens.
- 2 Go to the day you want to check with the arrows, or select **Today**.
- 3 Read the **Coverage** strip. The **Human (productive)** line counts people on a **Shift** or in a **Meeting**. The **AI** line counts the phone numbers where the AI agent is answering.
- 4 Point to any time on the strip. A tooltip shows the count for that 15 minutes, such as "10:15 AM – 10:30 AM · 3 human".
- 5 Read the rows. Each AI row shows the AI agent's share on that number, such as "AI · 100% handle". Each person's row shows their team.
- 6 Read the blocks. The legend at the top right explains them: **Human** (solid green), **AI · always on** (solid teal) and **AI · scheduled** (stripes).



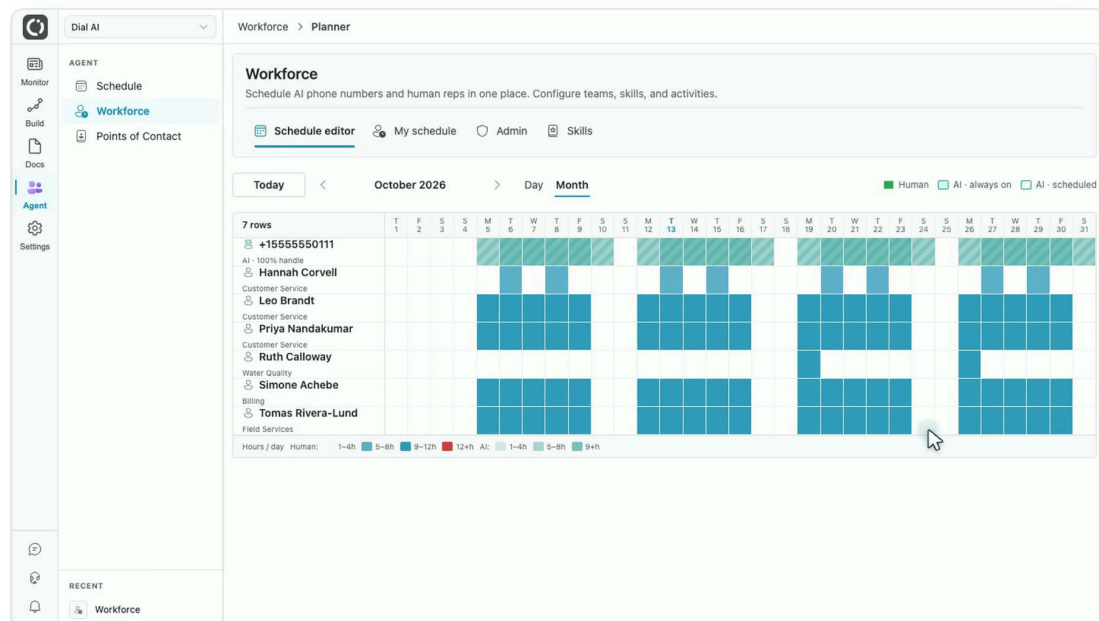
The Schedule editor in Day view. The Coverage strip shows the human line rising during office hours and the AI line rising after 5:00 p.m., above the after-hours line and the team's shifts.

- 7 Look for gaps. In the evening your team goes home and the AI agent's line should rise. Where both lines are low at the same time, add a shift, or raise the AI agent's share for that time on the **Schedule** page.
- 8 To read a number's AI hours, select its AI block. The **Schedules for** dialog opens for that number. Select **Done** to close it.

NOTE Supervisors can read a number's AI hours in the **Schedules for** dialog. Changing them is up to your Customer Admin.

See the whole month

- 1 In the planner toolbar, select **Month**. Each row shows a grid of hours per day for each person and each phone number.
- 2 Read the shading. Darker cells mean longer days, so a light week stands out.
- 3 Select a day to open it in **Day** view.



The Schedule editor in Month view, with a row of daily hours for the after-hours line and for each person on the team.

Change or remove a shift

IMPORTANT If the shift repeats, a change applies to the whole series, not only the day you selected.

- 1 On the **Schedule editor**, select the shift. The **Edit activity** dialog opens.
- 2 Change the **Activity**, **Start**, **End** or days.
- 3 Select **Save**. The planner updates.

IMPORTANT **Delete** (or **Delete series** for a repeating shift) removes it at once, with no confirmation.

TIP To change a repeating shift from a certain day on, end the series the day before with **Ends > On date**, then add the new shift.

See your own schedule

My schedule shows the shifts and activities planned for you. You can read it but not change it.

- 1 Select **Agent > Workforce**.
- 2 Select the **My schedule** tab. Your name and email appear at the top.
- 3 Read **Today**. Each activity shows its name and times. "Nothing scheduled for today." means you have no activities today.
- 4 Read **This week**. Each day shows its activities, or **Off**.
- 5 Read **Next 4 weeks**. Each day shows the hours you're scheduled, such as "9.0h".

Workforce > My

Workforce
Schedule AI phone numbers and human reps in one place. Configure teams, skills, and activities.

Schedule editor **My schedule** Admin Skills

Priya Nandakumar
priya.nandakumar@dialdistrictwater.example [Active](#)

TODAY
Shift
8:00 AM – 5:00 PM

THIS WEEK

Mon Oct 5	Tue Oct 6	Wed Oct 7	Thu Oct 8	Fri Oct 9	Sat Oct 10	Sun Oct 11
Shift 8:00 AM	Shift 8:00 AM	Shift 8:00 AM	Shift 8:00 AM	Shift 8:00 AM	Off	Off

NEXT 4 WEEKS

Mon Oct 5	Tue Oct 6	Wed Oct 7	Thu Oct 8	Fri Oct 9	Sat Oct 10	Sun Oct 11
9.0h	9.0h	9.0h	9.0h	9.0h	Off	Off
Mon Oct 12	Tue Oct 13	Wed Oct 14	Thu Oct 15	Fri Oct 16	Sat Oct 17	Sun Oct 18
9.0h	9.0h	9.0h	9.0h	9.0h	Off	Off
Mon Oct 19	Tue Oct 20	Wed Oct 21	Thu Oct 22	Fri Oct 23	Sat Oct 24	Sun Oct 25
9.0h	9.0h	9.0h	9.0h	9.0h	Off	Off

My schedule for Priya Nandakumar, with today's shift, this week's days and her hours for the next four weeks.

NOTE If **Workforce** opens on a page that says "Couldn't load planner", select the **My schedule** tab. The planner is for the people who plan shifts.

NOTE If you see "You're not on a workforce schedule yet", ask your Customer Admin to add you on the **Admin** tab. To change a shift, ask your supervisor.

Quick reference

Customer Admin

TO...	DO THIS
See your AI hours	Agent > Schedule. Read the line under each number, the banners and blocks, and the badges in Schedules .
Set office hours and holidays	Agent > Schedule > New calendar > Weekly hours > Closures (holidays and days off) > Create calendar
Change an hours calendar	Hours of operation > Actions for (...) > Edit > Save calendar
Add next year's holidays	Open the calendar > Add US federal holidays > remove the days you work > Save calendar
Change how the AI agent answers a number	Agent > Points of Contact > pencil icon on the number > Routing > choose a mode > Save
Follow your office hours	Routing > Follow hours > Calendar > set AI share when open and AI share when closed > Save
Set weekly AI windows	Routing > Custom schedule > Edit schedule > turn on days > Save schedule > Save
Add a holiday to a Custom number	Edit schedule > Add exception > name, date, All day , AI % > Save schedule
Add a window that spans days	Agent > Schedule > New schedule > Time Block > Add
Pause a time block	Select the block > clear Enabled > Save
Add a team	Agent > Workforce > Admin > Add team > name, color > Create
Add a CSR to the workforce	Admin > Add agent > person, team, skills > Create
Create a skill	Agent > Workforce > Skills > Create > Name > Create
Take someone off the planner	Admin > pencil icon on their row > Status inactive > Save

Supervisor

TO...	DO THIS
Open the planner	Agent > Workforce > Schedule editor
Go to another day	Previous day / Next day arrows, or Today
Add a shift	Select empty space on the person's row > Activity Shift > Start / End > Create
Repeat a shift every week	In Add activity , select Repeat weekly > Days of week
Change a shift	Select the shift > Edit activity > Save
Check coverage	Read the Coverage strip: Human (productive) and AI
Read a number's AI hours	Select its AI block > Schedules for dialog > Done
See the whole month	Month > select a day to open it
See your AI hours for the week	Agent > Schedule

CSR

TO...	DO THIS
See your schedule	Agent > Workforce > My schedule
See today's activities	Read Today
See this week	Read This week : each day's activities, or Off
See your hours ahead	Read Next 4 weeks : hours per day
Get a shift changed	Ask your supervisor

Troubleshooting

PROBLEM	WHAT TO DO
There's no New schedule button, and blocks don't open.	Your role can read AI hours but not change them. Ask your Customer Admin.
A schedule shows Not in use.	The number isn't on Custom schedule . Open its Routing tab, choose Custom schedule , and select Save .
Add Schedule says "Won't route calls yet".	The number isn't on Custom schedule . The block saves, but it won't route calls until you change the number's routing.
Follow hours is grayed out.	You don't have an hours calendar yet. Select Set hours of operation , create one, then choose it.
Edit schedule is grayed out.	The number has a window the weekly editor can't show. Read the caption under the buttons, then use Advanced editor .
Callers reached the fallback contact at night or on a holiday.	On Custom schedule , the AI agent takes 0% outside your windows. Add a window or an exception for that time, or switch to Follow hours .
A Follow hours number treated a working day as closed.	Check the calendar's Closures (holidays and days off) . Remove any holiday your office works.
Times look a few hours off.	The page shows times in your computer's time zone. Check your computer's time zone, and the calendar's own Time zone .
"Invalid schedule block" appears when you drag.	A drag can't make a block of 24 hours or more. Select New schedule and set the days and times in the dialog.
"End time must be after start time when From day and To day are the same."	Choose a later To time, or a later To day for an overnight window.
An exception says it overlaps another.	Two exceptions can't cover the same time. Change the dates or remove one.
Workforce says "Couldn't load planner".	The planner is for the people who plan shifts. Select My schedule to see your own.

Someone is missing from the planner.	On the Admin tab, check their Status . The planner hides inactive people. If they aren't listed, select Add agent .
Someone is missing from Dial AI user.	They need a platform sign-in first. Add them in Settings > Users .
A lunch doesn't show as a dip in coverage.	Coverage ignores a Lunch on top of a Shift . Split the shift around the lunch.
You need a new phone number, or a number should run a different flow.	Ask your Dial AI team.

Glossary

TERM	MEANING
Activity	A Shift, Break, Lunch, Meeting or Training on someone's schedule.
Agent (on the Workforce pages)	A member of your team on the workforce schedule, such as a CSR. Everywhere else, "agent" means the AI agent.
AI hours	The share of calls the AI agent answers at a given time.
AI share, AI handle %	The percentage of calls the AI agent takes. The rest go to the fallback contact.
Closure	A holiday or day off in an hours calendar. The office counts as closed.
Coverage	How many people and AI phone numbers are working at each time of day.
Exception	A one-off date in a weekly AI schedule, such as a holiday, with its own AI share.
Fallback contact	The Contact Book number that gets the calls the AI agent doesn't take.
Flow	What the AI agent follows in a conversation on a given number or channel.

Hours-of-operation calendar	Your office's weekly hours, holidays and days off, in one time zone.
Routing mode	How a phone number decides the AI agent's share: Always on , Follow hours or Custom schedule .
Skill	A label for what someone on your team can handle. Conversations that need it go to people who have it.
Time block	One weekly window of AI hours on the Schedule page.



Need a hand?

Your Dial AI team is here to help with anything this handbook doesn't cover, and with changes only Dial AI makes, such as editing a flow or adding a phone number.

Email support@dialai.ca