DialOAI

PLATFORM HANDBOOK

Assistant

AI helpers for your team. Ask about your conversations and performance, and read the reports your scheduled agents make for you.

Supervisor

ASSISTANT HANDBOOK

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Overview

The **Assistant** tab holds AI helpers for your team, called analyst agents. You ask them about your conversations and performance in plain English. They answer with numbers, tables, charts and files you can download. Some analyst agents also run on a schedule, so a report is ready when you start your week.

Analyst agents work for your staff. They never talk to your customers. The AI agent is still the agent your customers talk to by phone, chat, text and email.

This handbook is for supervisors. To use it, sign in to the Dial AI platform with your work email. In the left menu you see **Assistant**, with **Chat** and **Scheduled Agents** under it, and the **Ask AI** button near the bottom of the menu. If they are missing, ask your Customer Admin to check your role.

Your Dial AI team sets up your analyst agents and their scheduled reports. In this handbook the analyst agent is **Dial District Water Analyst** and the scheduled task is **Weekly Review**. To add an analyst agent, change what it can see, or set up a new scheduled report, ask your Dial AI team.

IMPORTANT AI writes the answers. Before you share a number, check it against **Monitor > Dashboard** for the same dates.

01 Chat with an analyst agent

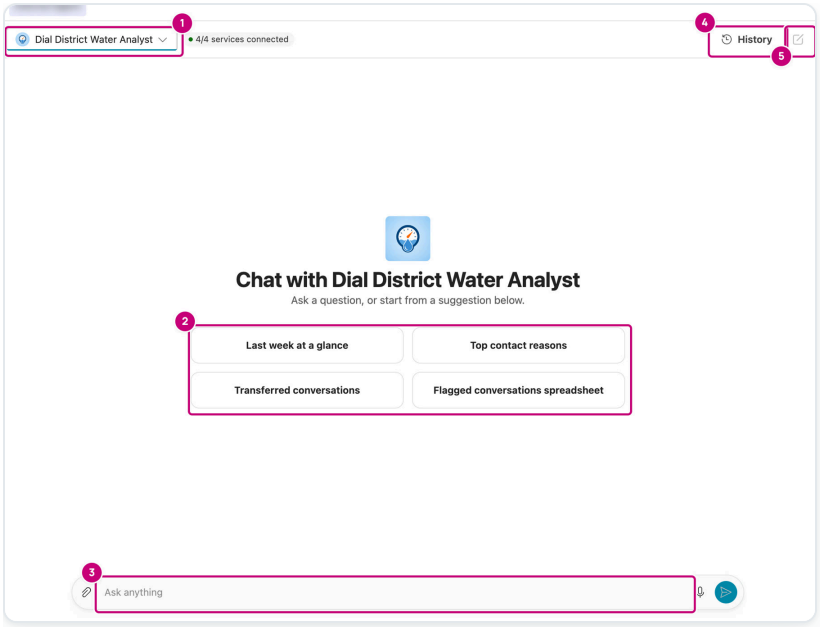
Ask a question in plain English instead of building a report by hand. This chapter covers opening the chat, asking good questions and switching agents.

01 Open the chat and choose an analyst agent
02 Start from a suggested prompt
03 Ask your own question
04 Switch to a different analyst agent

Open the chat and choose an analyst agent

Choose the analyst agent first, because each one answers about the data it was set up for.

1. In the left menu, select **Assistant > Chat**. The chat page opens with a welcome that names the current analyst agent.
2. At the top left, select the agent picker. A list of your team's analyst agents opens, each with a short description.
3. Choose **Dial District Water Analyst**. The welcome changes to **Chat with Dial District Water Analyst**, with a few suggested prompts under it.



A new chat with Dial District Water Analyst: the agent picker (1), the suggested prompts (2), the Ask anything box (3), History (4) and New Chat (5).

> NOTE The pill beside the picker, such as **4/4 services connected**, shows whether the agent can reach all of its data. If it shows fewer than all, answers may be missing data.

Start from a suggested prompt

Suggested prompts are a quick way to see what an analyst agent can do. Your Dial AI team can give each agent up to four.

1. Start a new chat with the analyst agent you want. The suggested prompts appear as cards under the welcome.
2. Select a card, such as **Last week at a glance**. The agent starts answering straight away.
3. Read the answer. Some answers lead with the headline numbers as cards, sometimes with the change from the week before.



The answer to Last week at a glance: headline numbers as cards, with a short summary under them.

Ask your own question

Be specific. The more you say about what you want, the better the answer.

1. Select the **Ask anything** box at the bottom of the chat.
2. Enter your question. Name the time period and say how you want the answer. For example: "Show the top five reasons customers contacted us in the last 7 days as a bar chart."
3. Press **Enter**, or select **Send**. The answer appears under your question, a few lines at a time.
4. To narrow the answer, enter a follow-up in the same box, such as "Only phone calls, please." The agent remembers everything earlier in the chat.

TIP A good question names the flow, the channel and the dates, such as "phone calls on the Dial District Water flow, last week". Then it says the shape you want: "as a table", "as a bar chart" or "as a spreadsheet".

TIP While the agent is answering, **Send** turns into **Cancel**. Select it to stop a long answer. To copy an answer, point to it and select **Copy**.

TIP In Chrome, select **Speech to text** (the microphone) to say your question instead of typing it. Select **Add attachment** (the paperclip) to give the agent a file to read, such as a spreadsheet.

NOTE Rows such as **Thinking** or **List calls** above an answer show the lookups the agent made. You can open them, but you don't need to.

Switch to a different analyst agent

The agent picker locks once a chat has messages, so each chat stays with one analyst agent.

1. At the top right of the chat page, select **New Chat**. A new, empty chat opens.
2. Select the agent picker and choose the analyst agent you want.

02 Charts, tables and files

Answers can hold charts, tables and files. This chapter shows how to read them, open the conversations behind them and save results to share.

01 Read a chart
02 Work with a table
03 Summarize one conversation from a table
04 Download a spreadsheet, PDF or presentation

Read a chart

A chart shows a pattern at a glance, such as what drove contact last week.

1. Ask for a chart. For example: "Show the top five reasons customers contacted us in the last 7 days as a bar chart." A bar or line chart appears in the answer.
2. Point to a bar or a point on the line. A label shows its exact number.
3. If buttons appear under the chart, such as **Compare with the week before**, select one to ask that follow-up. The agent suggests these buttons for each answer, so they change.



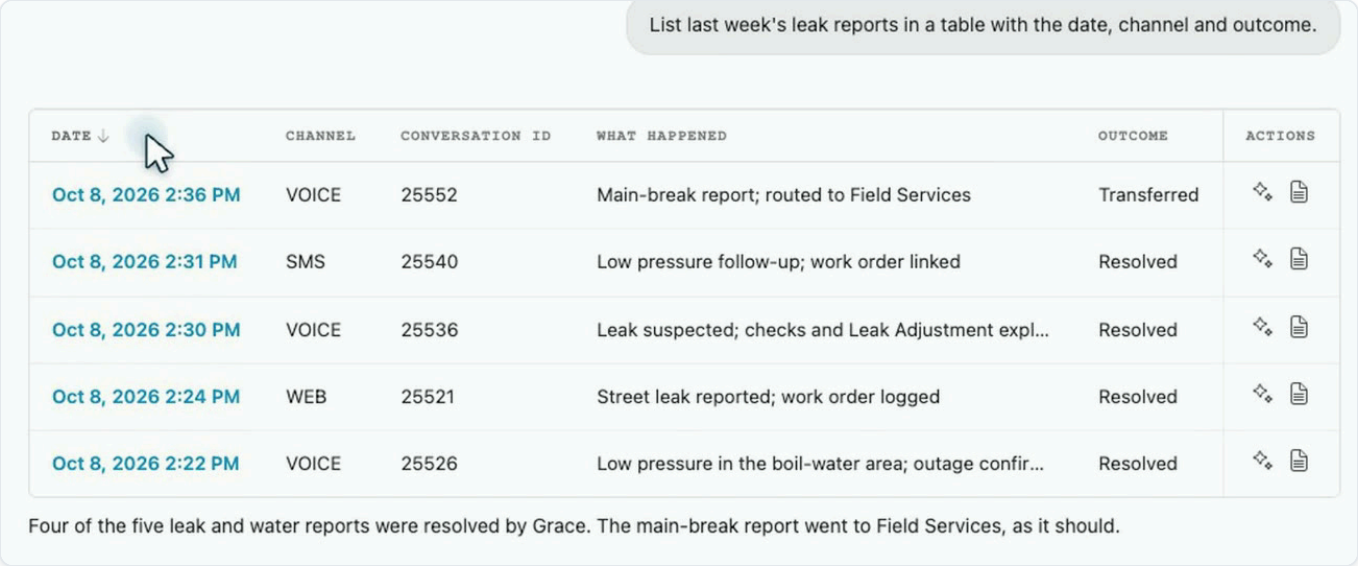
A bar chart of the top five contact reasons for the last 7 days, with two suggested follow-ups under it.

TIP Charts have no download button. To keep a chart's numbers, ask for the same data as a spreadsheet, or ask for a PDF or presentation that includes the chart.

Work with a table

A table lets you scan many conversations at once and open the ones that matter.

1. Ask for a table. For example: "List last week's leak reports in a table with the date, channel and outcome." A table appears in the answer.
2. To sort, select a column heading. Select it again to reverse the order.
3. To open a conversation, select its row. The conversation opens in a new browser tab, with its transcript and recording.

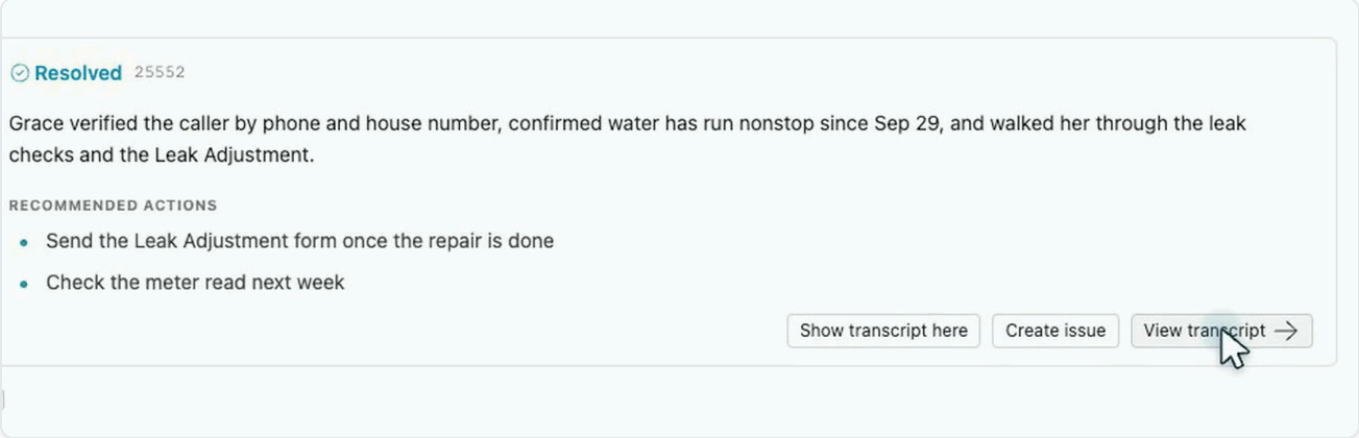


A table of last week's leak reports, sorted by date, with the Summarize and Show transcript buttons in the Actions column.

Summarize one conversation from a table

Read what happened on one conversation without leaving the chat.

1. In the table, go to the conversation's row and find the **Actions** column.
2. Select **Summarize** (the sparkle). A call summary appears in the chat, marked **Resolved** or **Unresolved**, with **Recommended actions**.
3. To read the whole conversation, select **Show transcript here** to see it in the chat, or **View transcript** to open it in a new tab.



A call summary marked Resolved, with recommended actions and the Show transcript here, Create issue and View transcript buttons.

TIP The second button in the **Actions** column, **Show transcript**, shows the transcript in the chat straight away.

NOTE **Create issue** on a call summary files an issue with the conversation attached, so someone can follow it up on **Build > Issues**.

Download a spreadsheet, PDF or presentation

Ask for a file when you need to share results or work with them in Excel.

IMPORTANT Downloaded files can hold customer details, such as names and phone numbers. Store and share them the way your organization's privacy policy requires.

1. Ask for the file by type. For example: "Make a spreadsheet of last week's transferred Dial District Water conversations, with the date, channel and transfer reason." A file card appears in the answer, with the file's title and its type: **Table**, **Spreadsheet**, **PDF** or **Presentation**.
2. For a table or a spreadsheet, select the card. A viewer opens beside the chat and shows what's in the file.
3. In the viewer's top bar, select the download arrow. The file saves to your computer: a table as a .csv file, a spreadsheet as an .xlsx file.
4. To close the viewer, select the **X** in its top bar. The chat fills the page again.
5. For a PDF or a presentation, select **Download** on the card. The file opens in a new tab, where you can save it.

TIP To give the viewer more room, drag the divider between the viewer and the chat.

NOTE A PDF or presentation link works for a limited time. The card shows how long, for example "link expires in ~14 min". If it has expired, ask the agent to make the file again.

03 Chat history

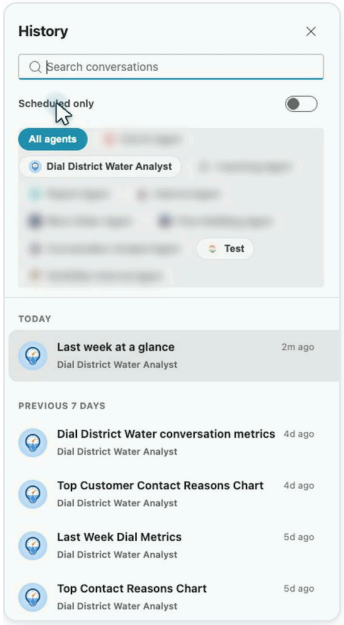
The platform saves every chat, so you can pick up where you left off.

01 Open a past chat

02 Delete a chat

Open a past chat

1. At the top right of the chat page, select **History**. A panel lists your chats under **Today**, **Yesterday**, **Previous 7 days** and **Older**.
2. To find a chat, enter part of its title in **Search conversations**, or select an analyst agent's name to see only its chats. Select **All agents** to see them all again.
3. Select a chat. The panel closes and the chat opens. You can keep asking in it.



The History panel, with Search conversations, the Scheduled only switch, the agent filters and past chats grouped by day.

TIP Turn on **Scheduled only** to see only the reports your scheduled agents made. See "Read a scheduled report".

Delete a chat

1. Select **History**, then point to the chat you want to remove.
2. Select **More options** (...) on its row, then **Delete**. A message asks you to confirm.
3. Select **Confirm**. The chat leaves your history.

04 Scheduled reports

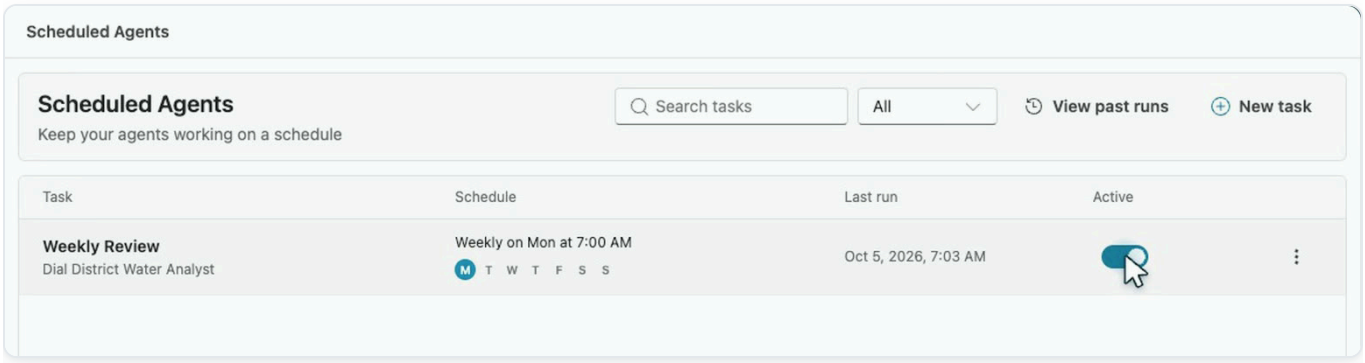
A scheduled agent runs a saved request on a timetable, such as a review of last week every Monday morning. The platform saves each run as a chat, so the report is waiting for you.

01 See your scheduled agents
02 Read a scheduled report
03 Ask about a scheduled report

See your scheduled agents

1. In the left menu, select **Assistant > Scheduled Agents**. The **Scheduled Agents** page lists your team's scheduled tasks.
2. Read each row. **Task** shows the task's name and its analyst agent. **Schedule** shows when it runs, such as **Weekly on Mon at 7:00 AM**. **Last run** shows the date and time of the latest run, or **No runs yet**.

3. Check the **Active** switch. On means the task runs on its schedule. Off means it is paused.
4. To find a task, enter part of its name in **Search tasks**, or choose **Active** or **Inactive** in the filter beside it.

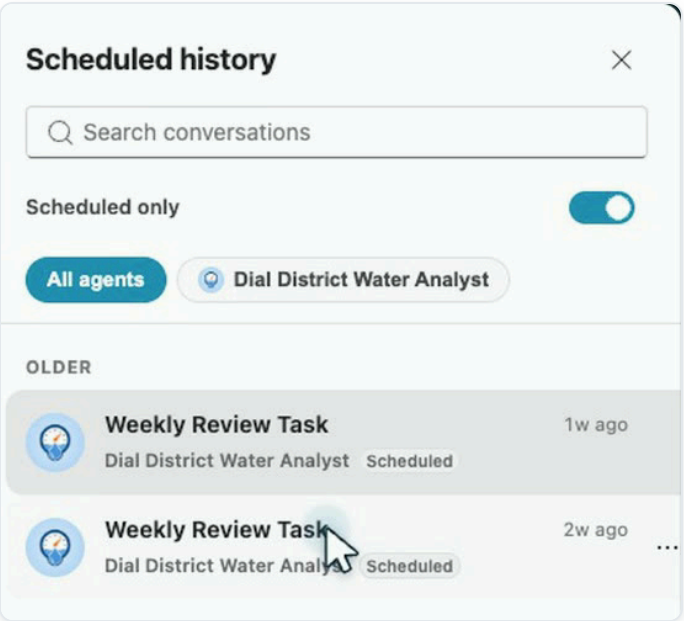


The Scheduled Agents page with the Weekly Review task: its analyst agent, its schedule, its last run and the Active switch turned on.

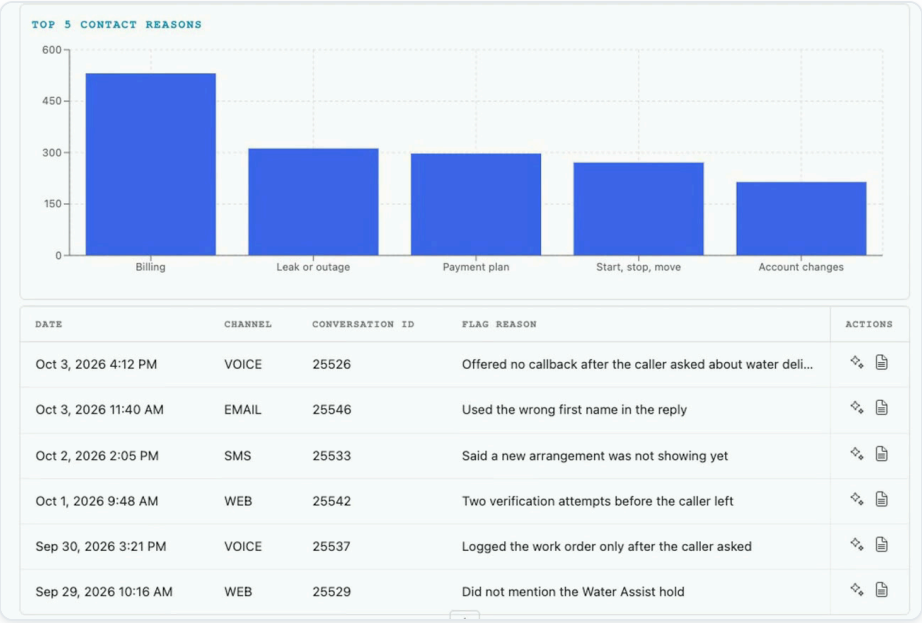
NOTE To pause a task, change its schedule or add a new one, ask your Dial AI team.

Read a scheduled report

1. On the **Scheduled Agents** page, select **View past runs**. The chat page opens with the **Scheduled history** panel, showing only scheduled runs, newest first. Each run is marked **Scheduled**.
2. Select the latest run, such as **Weekly Review Task**. The panel closes and the run opens: the task's request at the top, then the agent's answer.
3. Read the report as you would any chat. Charts, tables and file cards work the same way. Select a table row to open that conversation in a new tab.



The Scheduled history panel with Scheduled only turned on and two Weekly Review runs, each marked Scheduled.



Part of a weekly report: a bar chart of the top contact reasons and a table of conversations flagged for review.

TIP You can also reach past runs from the chat page. Select **History**, then turn on **Scheduled only**.

NOTE Scheduled runs are shared. Everyone on your team who uses the Assistant tab sees the same runs.

Ask about a scheduled report

1. Open the run you want, as in "Read a scheduled report".
2. In **Ask anything**, enter a follow-up, such as "Which of these flagged conversations were repeat callers?" The agent answers under it.

NOTE A run shows your data as it was when the task ran. For today's numbers, start a new chat.

05 Ask AI from any page

You don't have to leave the page you're on to ask a question. Ask AI opens a chat card over any page.

01 Open Ask AI
02 Explain a conversation
03 Ask about a list of conversations
04 Ask about an emailed report

Open Ask AI

1. In the left menu, select **Ask AI**, or press **Ctrl+Space**. A chat card opens over the page.
2. Enter your question and press **Enter**. The card uses your team's default analyst agent, and it tells the agent which page you're on.
3. To close the card, select **Close (Esc)** or press **Esc**. To keep it for later, select **Minimize**.

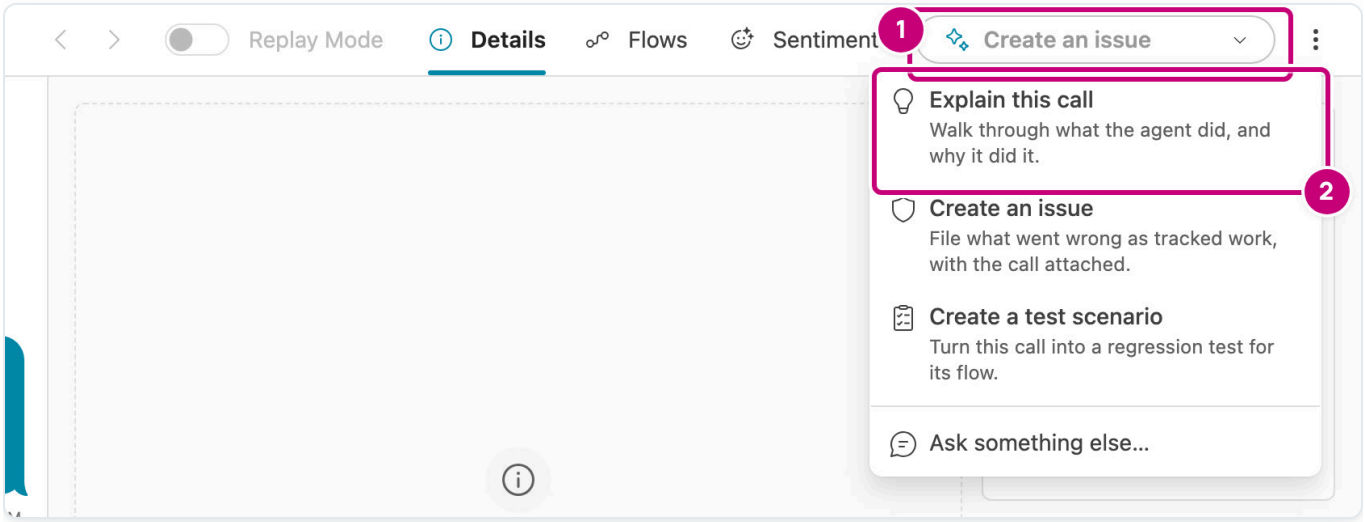
The card's top bar also has **History** (your past chats), **New conversation** and **Open in full page**, which moves the chat to the full chat page. Select **+** in the card's box to attach a file or a screenshot of the page.

TIP On a Mac, Control+Space can switch your keyboard language. If it does, select **Ask AI** in the left menu instead.

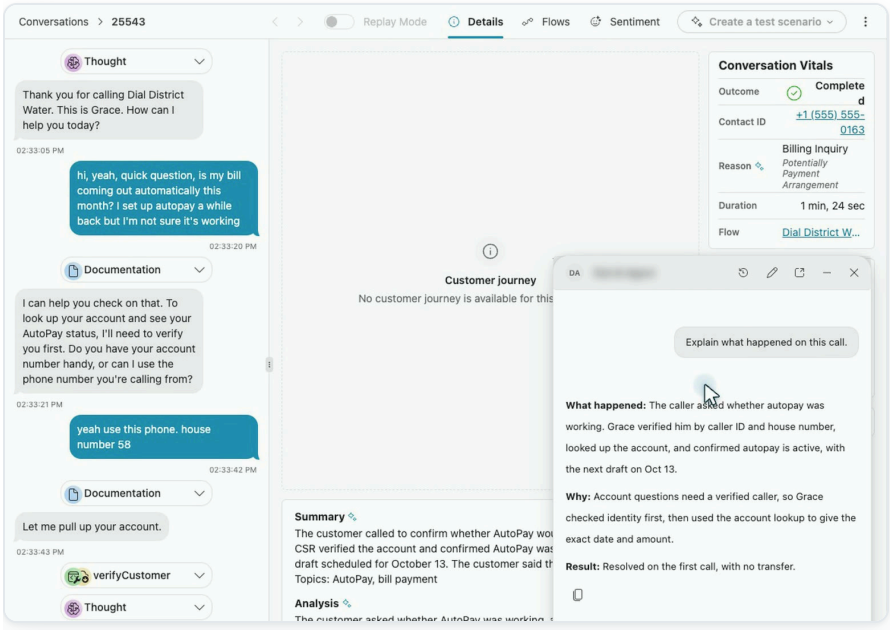
Explain a conversation

Use this to understand what the AI agent did on a conversation, and why.

1. Open the conversation from **Monitor > Conversations**.
2. At the top right, select the **Ask AI** button, marked with a sparkle. Its label types out what it can do, such as **Explain this call**. A list opens.
3. Select **Explain this call**. The chat card opens and walks you through what happened, why the AI agent did what it did, and the result.



The Ask AI list on a conversation, with Explain this call at the top.



A conversation with the Ask AI card open, explaining what happened on the call, why, and the result.

NOTE Depending on your role, the list also offers **Create an issue** and **Create a test scenario**. Select **Ask something else…** to type your own question.

Ask about a list of conversations

1. Select **Monitor** › **Conversations** and set the filters you want.
2. At the top right of the page, select the **Ask AI** button, marked with a sparkle. Its label types out what it can do, such as **Compare to last week**. A list opens.
3. Choose **What went wrong in these calls?** or **What changed vs last week?** The agent answers about the conversations your filters show.

Ask about an emailed report

Scheduled report emails from **Monitor** › **Dashboard** have an **Ask Dial AI about this report** button.

1. In the report email, select **Ask Dial AI about this report**. The platform opens a chat that already has that report's data.
2. Ask your question, such as "Why did transfers go up on Tuesday?"

Quick reference

Supervisor

TO…	DO THIS
Ask an analyst agent a question	**Assistant** › **Chat** → choose the agent → enter your question in **Ask anything** → press **Enter**
Start from a suggested prompt	On a new chat, select a suggestion card under the welcome
Switch to a different analyst agent	**New Chat** → choose the agent in the picker

Stop a long answer	Select **Cancel**
See the exact number on a chart	Point to the bar or point
Sort a table in an answer	Select the column heading; select it again to reverse
Open a conversation from a table	Select its row; it opens in a new tab

Read a conversation inside the chat	In the **Actions** column, select **Summarize**
Download a table or spreadsheet	Select the file card → select the download arrow
Download a PDF or presentation	Select **Download** on its card
Reopen a past chat	**History** → search or pick a chat
See your scheduled tasks	**Assistant > Scheduled Agents**
Read a scheduled report	**Assistant > Scheduled Agents** → **View past runs** → select a run
Ask about the page you're on	Select **Ask AI** or press **Ctrl+Space**
Understand one conversation	Open the conversation → **Ask AI** → **Explain this call**

Troubleshooting

PROBLEM	WHAT TO DO
Assistant or Ask AI is missing from the left menu.	Your role doesn't include it. Ask your Customer Admin.
The chat page says No Agents Available.	No analyst agent is set up for your team yet. Ask your Dial AI team.
You can't change the agent in the picker.	The picker locks once a chat has messages. Select **New Chat**, then choose the agent.
The pill beside the picker shows fewer services than it should, such as 2/3 services connected.	One of the agent's data sources can't be reached, so answers may be missing data. Try again later. If it stays, tell your Dial AI team.
The answer says Failed to generate response.	Ask again. If it happens twice, select **New Chat** and ask there.
The agent's numbers don't match the Dashboard.	Ask the agent which dates, flow and channels it counted. Then compare with **Monitor > Dashboard** for the same dates.
A PDF or presentation link no longer works.	The link has expired. Ask the agent to make the file again.
You want to save a chart.	Ask for the same data as a spreadsheet, or as a PDF or presentation.

A scheduled task shows No runs yet.	It hasn't reached its first run time, or it is paused. Check the **Active** switch and the **Schedule**.
The Active column shows Initialize instead of a switch.	The task isn't allowed to run yet. Ask your Dial AI team to finish setting it up.
A task shows Re-consent to keep running.	The task has stopped running until it is renewed. Ask your Dial AI team.
Speech to text is missing.	It works in Chrome only. Switch to Chrome, or type your question.

Glossary

TERM	MEANING
AI agent	The virtual agent that answers your customers by phone, chat, text and email.
Analyst agent	An AI helper for your staff that answers questions about your conversations and performance. It never talks to customers.
Ask AI	A chat card you can open over any page, plus a button of ready-made questions on some pages.
Call summary	A short account of one conversation in the chat, marked Resolved or Unresolved, with recommended actions.
Conversation	One call, chat, text or email exchange between a customer and the AI agent.
File card	A card in an answer that holds a table, spreadsheet, PDF or presentation you can open and download.

Flag	A mark that sets a conversation aside for review.
Run	One time a scheduled task ran, saved as a chat.
Scheduled agent	An analyst agent that runs a saved request on a timetable, such as every Monday morning.
Suggested prompt	A ready-made question shown as a card when you start a new chat.

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