DialOAI

PLATFORM HANDBOOK

Docs

Find answers in your documents, check the source, and keep your documents and FAQs current.

CSR | Supervisor | Customer Admin

DOCS HANDBOOK

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Overview

The **Docs** tab holds the documents and FAQs that your team and the AI agent answer from. It has three pages:

- **Search**: ask a question and get a short answer, with the documents it came from listed underneath.
- **Manage**: your document library, with one card for each document.
- **FAQ**: a list of common questions, each with one short answer.

CSRs and supervisors use **Search** to answer customers quickly, and open the source to check the answer before they pass it on. They can also read the library and the FAQs. Customer Admins keep the library current: they upload, replace and delete documents, and add, edit and remove FAQs. A current library means fewer wrong answers on calls, chats, texts and emails.

To open Docs, sign in to the Dial AI platform and select **Docs** in the left menu. **Search**, **Manage** and **FAQ** appear under it.

NOTE The AI agent only uses the documents and FAQs that are linked to its flow. When you add a document or FAQ that the AI agent should use with customers, ask your Dial AI team to link it.

01 Search

Search reads the documents in your library and writes a short answer to your question. Under the answer, it lists the documents it used, so you can check the answer before you share it.

01 Ask a question
02 Check the source
03 Spot documents that disagree

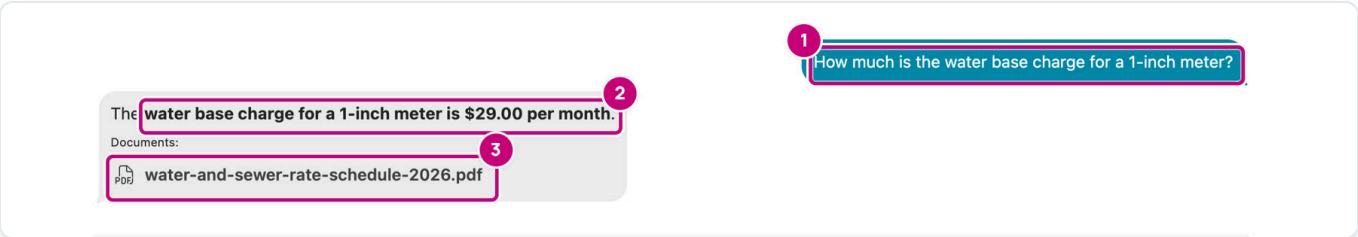
Ask a question

Use Search when a customer asks about a fee, a policy or a deadline, so you don't have to hunt through folders.

1. Select **Docs > Search**. A chat page opens with a box that says **Ask me anything...**
2. Enter a full question, the way the customer asked it. For example: "How much is the water base charge for a 1-inch meter?"

3 Press **Enter**, or select the send arrow. Your question appears, and the answer appears below it in a few seconds.

4. Read the answer. Under it, **Documents:** lists each document the answer came from, for example **water-and-sewer-rate-schedule-2026.pdf**.



A question on the Search page, the answer below it, and the rate schedule listed under Documents.

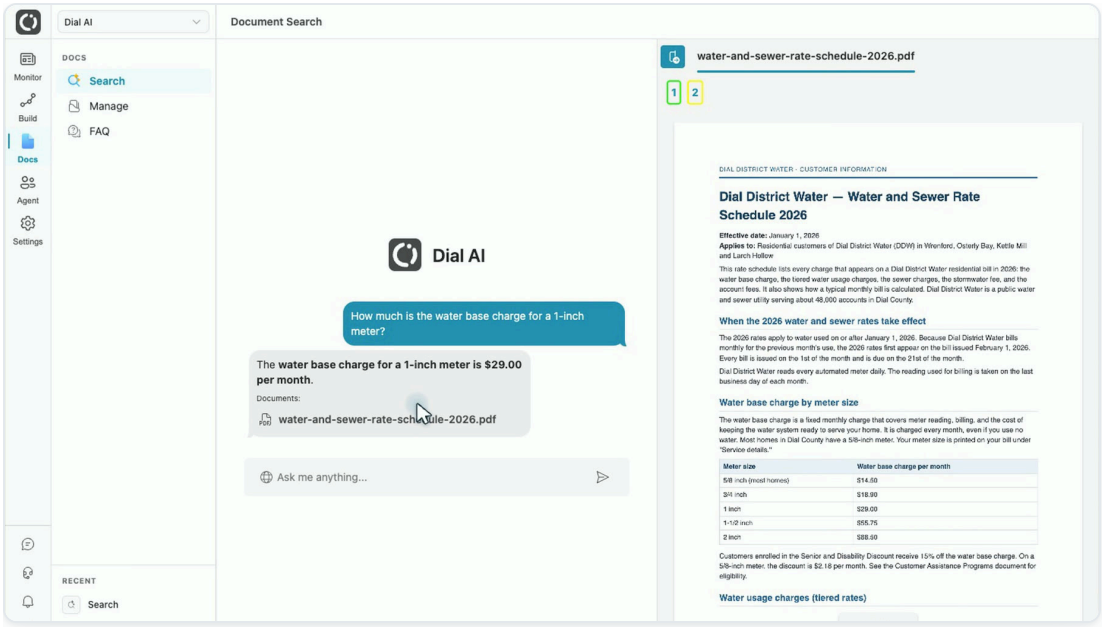
TIP Ask one full question at a time. "What is the late fee if I pay after the 21st?" works better than "late fee?"

NOTE You can't send a new question while an answer is still being written. Wait for it to finish.

Check the source

Checking the source takes a few seconds and keeps you from passing on a wrong answer. Do it before you tell a customer.

1. Under **Documents:**, select the document name. The document opens in a panel beside the answer, at the pages the answer used.
2. Look at the numbered tags above the document. Each tag is a page the answer drew on. Select a tag to jump to that page.
3. To read small print, use the zoom in and zoom out buttons under **Page 1 of 4** at the bottom of the panel. The page count matches your document.
4. Find the passage and compare it with the answer.
5. If the answer listed more than one document, select a document's name at the top of the panel to switch to it.
6. When you're done, select the arrow at the top left of the panel (**Close documents panel**). The chat fills the page again.



The cited rate schedule open in the panel beside the answer, with its numbered page tags at the top.

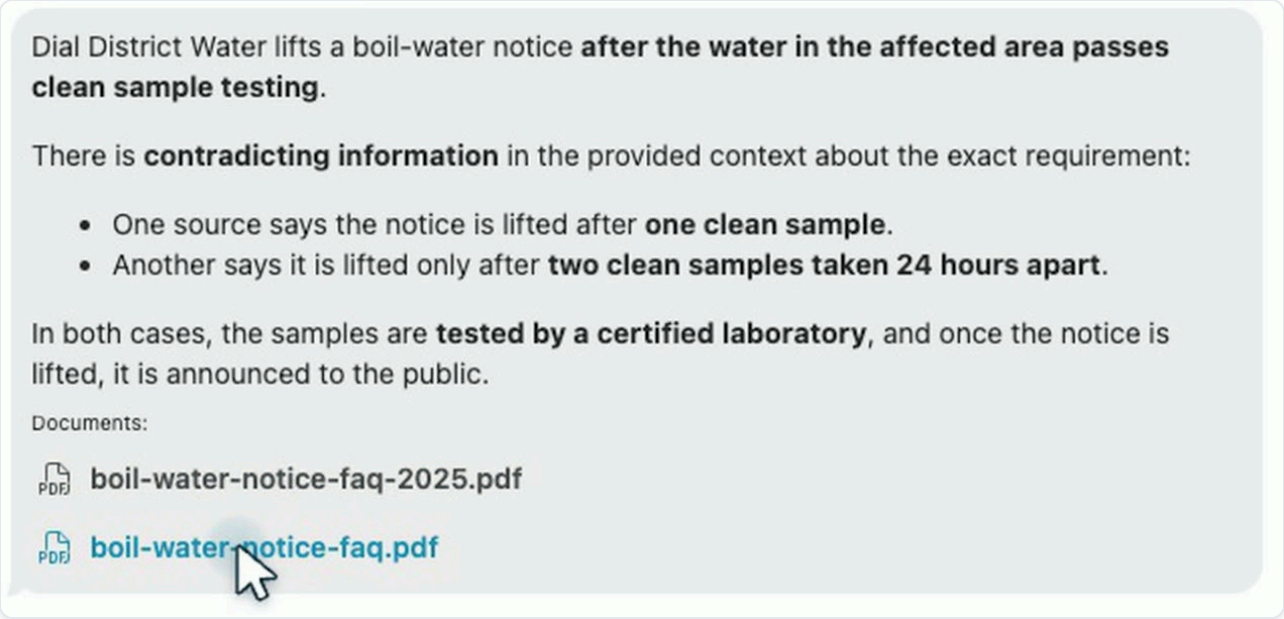
> **NOTE** PDF documents open in the panel. A document that comes from a web page opens in a new browser tab instead.

> **TIP** Every answer lists its own sources. Check them each time, even when the last answer came from a document you trust.

Spot documents that disagree

Sometimes two documents cover the same topic, and one of them is out of date. Search tells you when its sources don't agree.

1. Ask your question as usual. For example: "How do you decide when to lift a boil-water notice?"
2. Read the answer. If the sources disagree, the answer says so and gives each version.
3. Look under **Documents:**. Both files are listed, for example **boil-water-notice-faq-2025.pdf** and **boil-water-notice-faq.pdf**.
4. Open each document to see which one is current.
5. Don't guess. Tell your Customer Admin which documents disagree, so they can remove the old one.



An answer that says its sources disagree, with last year's file and the current file both listed under Documents.

TIP If an answer looks wrong, open the source and read it yourself. If the document itself is wrong or old, tell your Customer Admin. Fixing the document fixes the answer for your whole team, and for the AI agent.

02 Document library

Docs › Manage is your document library. Each card is one document, with its name and when it was uploaded. Everyone can open documents here. Only Customer Admins can change the library.

01 Open a document from the library
02 Upload a document
03 Replace an outdated document
04 Add a website as a source
05 Keep a connected source up to date

Open a document from the library

Open a document when you want to read the whole thing, not only the passage Search used.

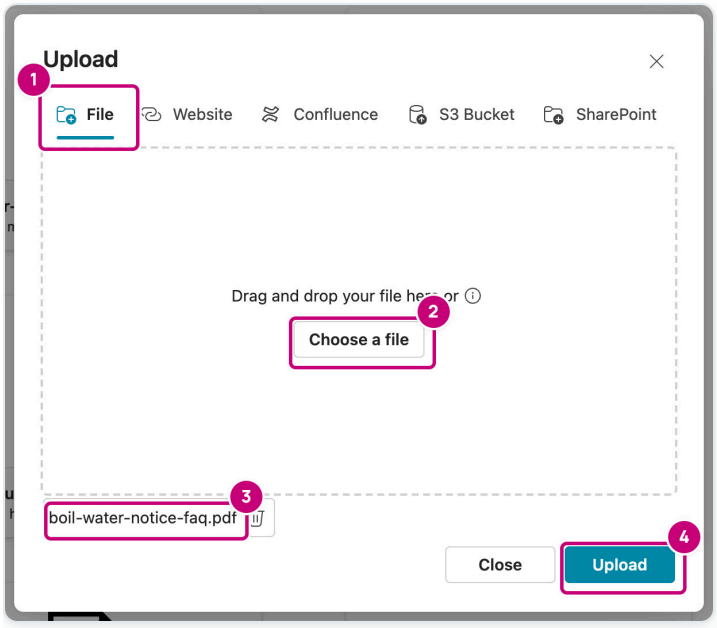
1. Select **Docs › Manage**. The **Document library** opens, with a count of documents at the top right.
2. Find the document's card.

3. Select **More actions** (the three dots) on the card. A menu opens.
4. Select **Open in New Tab**. The document opens in a new browser tab.

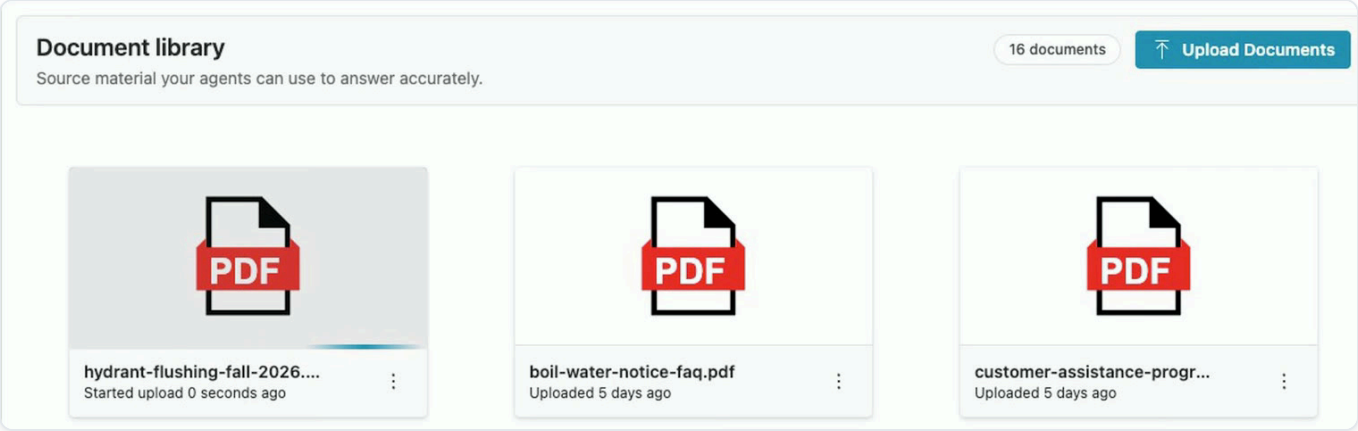
Upload a document

Upload a document when you have new reference material, such as a new rate schedule, policy or notice.

1. Select **Docs** › **Manage**.
2. Select **Upload Documents**. The **Upload** dialog opens on the **File** tab.
3. Select **Choose a file**. Your computer's file picker opens. You can also drag files onto the box that says **Drag and drop your file here or**.
4. Choose one or more files. Each file appears as a tag under the box.
5. Check the file names. To drop a file you picked by mistake, select the delete button on its tag.
6. Select **Upload**. The dialog closes. "Uploading file..." appears, then "Processing file...".
7. Find the new card. Its caption reads **Started upload**, and a progress bar runs along it while the document is read. You don't need to refresh the page.
8. Wait for the caption to change to **Uploaded**. Search can now use the document.



The Upload dialog on the File tab, with a PDF chosen and ready to upload.



A new card in the document library showing Started upload while the document is read.

File types and size

YOU CAN UPLOAD	UP TO
PDF (.pdf), Word (.docx), Excel (.xlsx), text (.txt), web page (.htm, .html), JSON (.json)	200 MB per file, unless your organization has a different limit

TIP Upload PDFs when you can. Your team can open a PDF right beside the answer in Search.

TIP Give files clear names, such as **payment-options.pdf**, not **scan_0412.pdf**. The file name is what your team sees under each answer.

NOTE The AI agent only uses documents linked to its flow. If the AI agent should use this document with customers, ask your Dial AI team to link it.

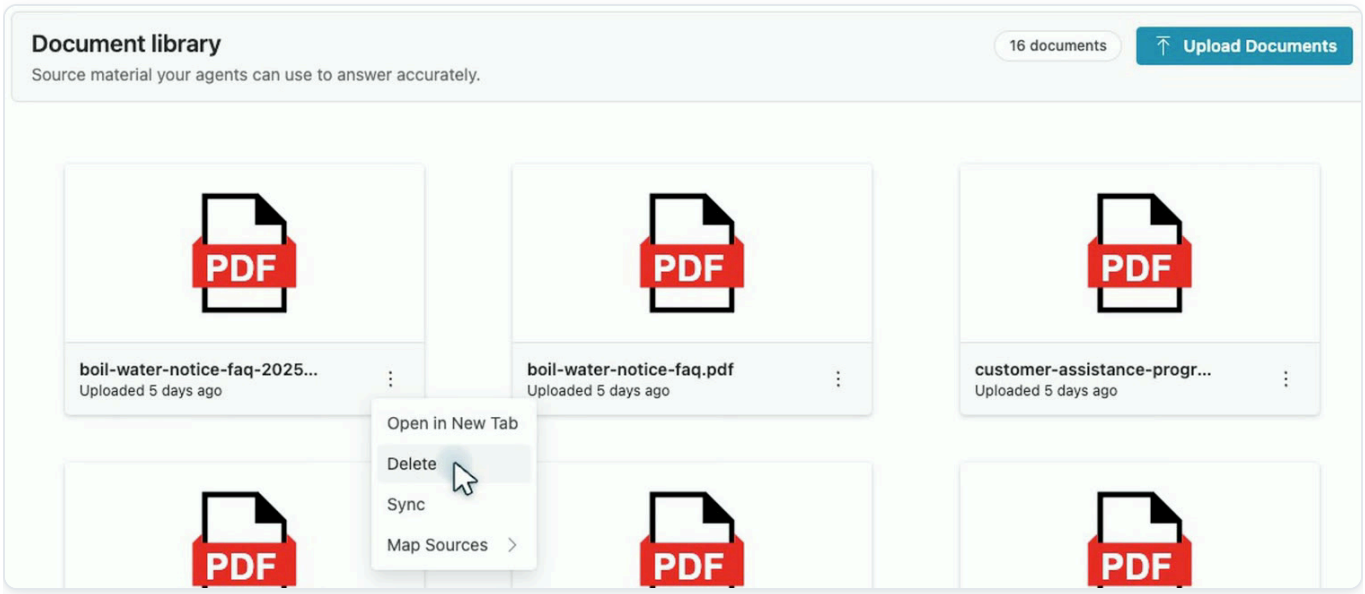
Replace an outdated document

An outdated document is worse than no document, because Search and the AI agent quote it with confidence. Uploading a new version never removes the old one, so Search keeps reading both until you delete the old card.

1. In **Docs > Search**, ask a question the document answers. For example: "How do you decide when to lift a boil-water notice?" Note the answer and the documents listed. This is your "before" check.
2. In **Docs > Manage**, upload the new version, if it isn't in the library yet. See "Upload a document".
3. Wait until the new card says **Uploaded**.
4. Find the old card, for example **boil-water-notice-faq-2025.pdf**. Read its name twice.
5. On the old card, select **More actions** (the three dots). A menu opens.

IMPORTANT **Delete** works the moment you select it. There is no "Are you sure?" step, and you can't undo it. Make sure you're on the old card.

6. Select **Delete**. "Deleting file..." appears, then "File deleted". The old card disappears.
7. In **Docs** › **Search**, ask the same question again. The answer now comes from the current document only.



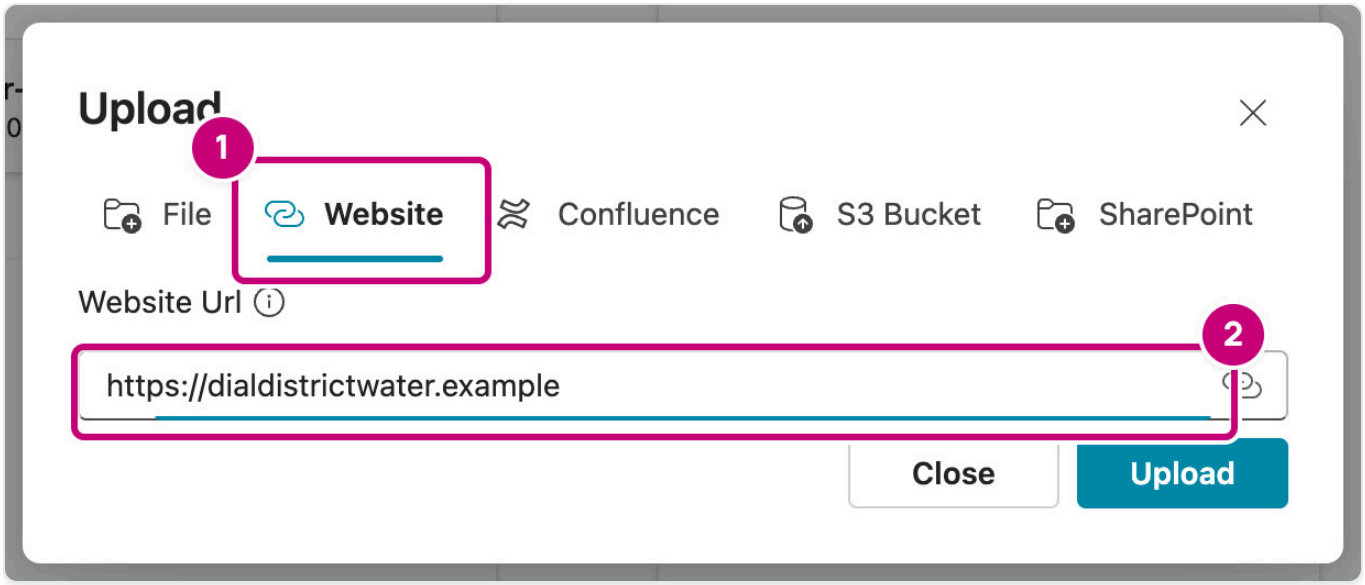
The More actions menu open on last year's boil-water file, with Delete ready to select.

NOTE If you see "Failed to delete file" and "The document is currently used by a flow", the AI agent uses this document with customers. Ask your Dial AI team to link the new version in its place, then delete the old one.

Add a website as a source

If your public website already explains a policy, you can add the site as a source instead of uploading its pages one by one.

1. Select **Docs** › **Manage**.
2. Select **Upload Documents**. The **Upload** dialog opens.
3. Select the **Website** tab.
4. In **Website Url**, enter your site's address, for example `https://dialdistrictwater.example`.
5. Select **Upload**. "Creating Document..." appears, then "Document successfully created". A new card appears for the site while its pages are read.



The Website tab of the Upload dialog with the utility's website address entered.

NOTE If the **Website** tab is grayed out, website sources aren't set up for your organization. Ask your Dial AI team to set them up.

Keep a connected source up to date

A connected source stays linked to where it lives, such as your website or a SharePoint library. **Sync** pulls in its latest changes without uploading anything.

1. Select **Docs** > **Manage**.
2. On the connected source's card, select **More actions** (the three dots). A menu opens.
3. Select **Sync**.
   - For a website, "Checking sitemap for changes..." appears, then "Refresh started" with a count, such as "3 changed, 1 new".
   - For another connected source, such as a SharePoint library, "Syncing document..." appears, then "Document synced successfully".

Sync a website on a schedule

1. On the website's card, select **More actions**, then **Schedule sync...**. The **Schedule automatic sync** dialog opens.
2. Choose **Daily**, **Weekly** or **Monthly**. Choose **Off** to stop automatic syncs.
3. Select **Save**.

Each sync checks the site's sitemap and reads again only the pages that changed.

NOTE Uploaded files don't sync. Selecting **Sync** on one shows "Cannot sync this type of document." To update an uploaded file, replace it.

TIP To connect a SharePoint library or another document system, ask your Dial AI team. Once it's connected, use **Sync** whenever it changes.

03 FAQs

An FAQ is one common question with one short, definite answer. Use an FAQ for something customers ask every day. Use a document for a topic customers ask many different questions about.

01 Read an FAQ
02 Add an FAQ
03 Edit an FAQ
04 Remove a duplicate FAQ

Read an FAQ

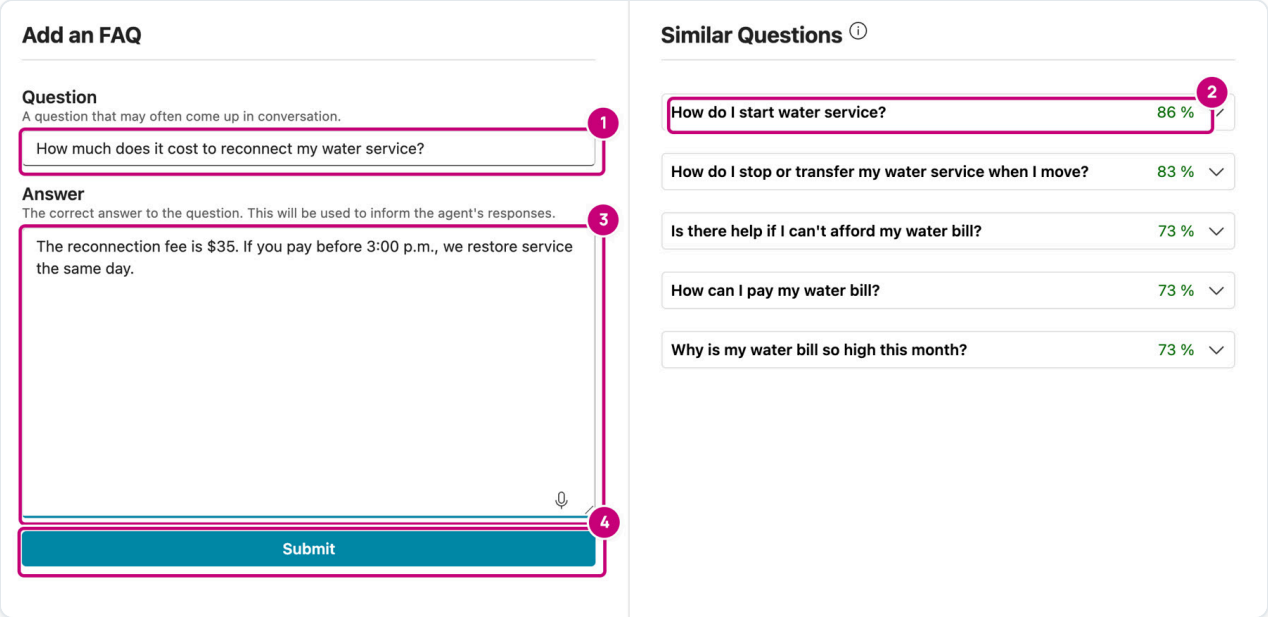
1. Select **Docs > FAQ**. The **FAQs** page opens, with a **Question** and **Answer** list on the left.
2. Select a question in the list. Its full question and answer open on the right.

Add an FAQ

Add an FAQ when customers keep asking something that your documents answer at length, or not at all. Check first that it isn't already there.

1. Select **Docs > FAQ**.
2. Select **Create FAQ**. The **Add an FAQ** page opens, with **Similar Questions** on the right.
3. In **Question**, enter the question the way a customer would ask it. For example: "How much does it cost to reconnect my water service?"
4. Look at **Similar Questions**. As you type, it lists existing FAQs that come close, each with a score. The closer a score is to 100 %, the closer the match.
5. Select a similar question to expand it and read its answer.
6. If an existing FAQ already answers the question, don't add a new one. Edit that FAQ instead.
7. In **Answer**, enter the answer in one to three sentences, with the exact fee, date or time. For example: "The reconnection fee is $35. If you pay before 3:00 p.m., we restore service the same day."
8. Select **Submit**. "Adding FAQ" appears, then "FAQ Added". The form clears, ready for another FAQ.

9 Select **Docs** › **FAQ** to see the new FAQ in the list.



The Add an FAQ page with a new reconnection-fee question and answer, and Similar Questions showing the closest existing FAQs with their scores.

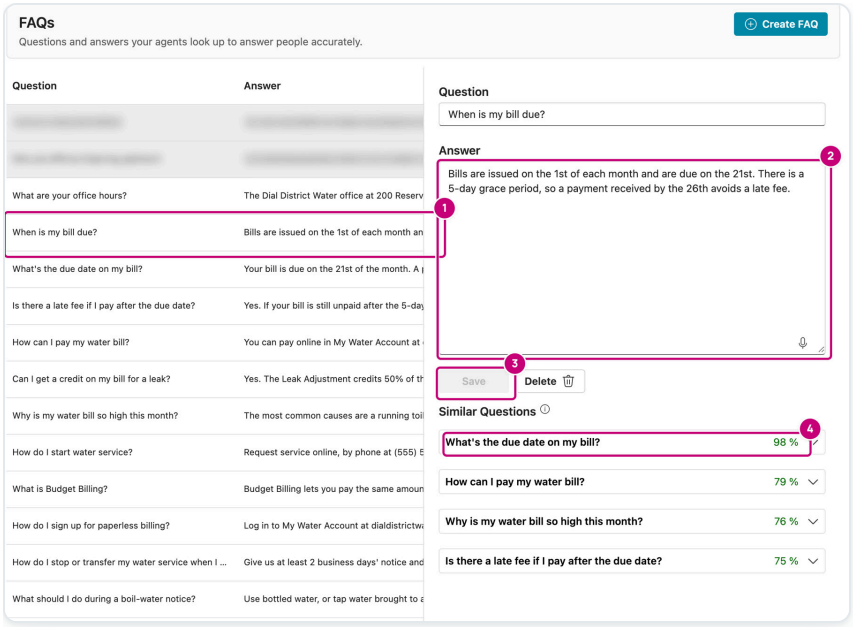
NOTE The question and the answer each need at least 5 characters. If one is too short, a message such as "Answer must be at least 5 characters" appears under it.

NOTE If the AI agent should use this FAQ with customers, ask your Dial AI team to link it to the AI agent's flow.

Edit an FAQ

Edit an FAQ whenever a policy, fee or date changes. Change any document that says the same thing at the same time, so the two never disagree.

1. Select **Docs** › **FAQ**. The right side says "Choose an FAQ".
2. Select the FAQ in the list, for example "When is my bill due?". Its **Question** and **Answer** open on the right, with **Similar Questions** below.
3. Change the question, the answer, or both. **Save** becomes available once you've made a change.
4. Select **Save**. "Updating FAQ" appears, then "FAQ Updated". The list shows the new text.



An FAQ open for editing, with Similar Questions showing a near-duplicate with a high score.

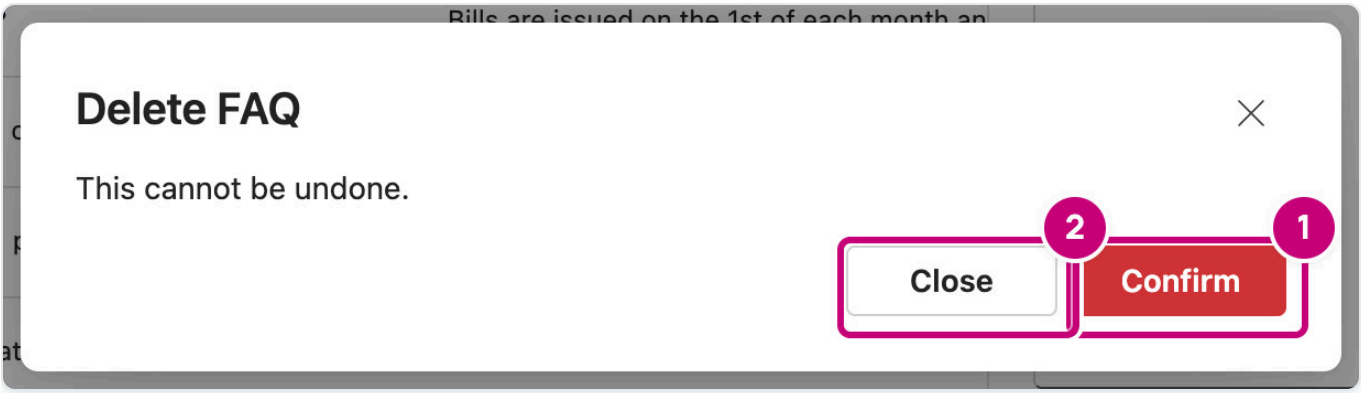
Remove a duplicate FAQ

Two FAQs that ask the same thing in different words can drift apart. When they do, customers get two different answers to one question.

1. In **Docs** > **FAQ**, select an FAQ. **Similar Questions** lists the FAQs that come closest.
2. Look for a near-duplicate with a high score, for example "What's the due date on my bill?" when you're on "When is my bill due?".
3. Decide which FAQ to keep. Copy anything useful from the other one into its **Answer**.
4. Select **Save**. "FAQ Updated" appears.
5. In the list, select the FAQ you don't need. Its **Question** and **Answer** open on the right.
6. Select **Delete**. The **Delete FAQ** dialog opens and says "This cannot be undone."

IMPORTANT You can't get a deleted FAQ back. Copy its answer somewhere first if you might need it.

7. Select **Confirm** to delete it, or **Close** to keep it. "Deleted FAQ" appears when it's gone.



The Delete FAQ dialog, with Close to keep the FAQ and Confirm to delete it.

04 Writing for Search and the AI agent

Search and the AI agent don't read a document from start to finish. They find the few passages that best match a question, and answer from those. Documents written with that in mind give better answers.

Write documents that answer well

Use these habits for every document you add.

Write each section so it stands alone

- Name the subject in every section. Write "A Leak Adjustment needs a repair receipt within 30 days of the repair," not "It must be sent within 30 days."
- Don't point elsewhere with "as described above" or "see the previous page".

Use headings that say what the section answers

- Write "How is a boil-water notice lifted?", not "Details" or "Other notes".

Keep one topic per document

- A rate schedule, a moving guide and a payment guide work better as three documents than as one long handbook.

Give exact facts

- Write the number, date, fee or list of steps: "$35", "8:00 a.m. to 5:00 p.m.", "2 business days".
- Spell out an abbreviation the first time it appears in each section, such as "Do-Not-Call (DNC)".

Use one name for one thing

- If one document says "Leak Adjustment" and another says "leak credit", pick one and use it everywhere.

Keep one current version

- Replace an outdated document. Don't upload the new one beside it.
- Make sure no two documents, and no document and FAQ, give different answers.
- Give every document an owner and a review date.

Make the text readable

- Upload documents with real text, not scanned images. A scanned page can be misread.
- Don't put a key fact only inside a picture or chart. Repeat it in the text.

Choose an FAQ or a document

USE	WHEN
FAQ	A common question with one short, definite answer
Document	Reference material that customers ask many different questions about

TIP After every upload, replacement or FAQ change, ask **Search** two or three questions customers really ask. Check that the answer is right and that the listed source is the one you expect.

Quick reference

CSR and Supervisor

To ask a question → **Docs** › **Search** › enter a full question in **Ask me anything...** › press **Enter**

To see where an answer came from → read the names under **Documents:** below the answer

To check the source → select the document name under **Documents:**

To jump to a cited page → select a numbered page tag at the top of the document panel

To read small print → zoom buttons under **Page 1 of 4** in the panel

To switch between cited documents → select the document's name at the top of the panel

To close the document → select the arrow at the top left of the panel

To open any document → **Docs** › **Manage** › **More actions** on its card › **Open in New Tab**

To read an FAQ → **Docs** › **FAQ** › select the question

To report a wrong, old or duplicate document or FAQ → tell your Customer Admin

Customer Admin

To upload a document → **Docs** › **Manage** › **Upload Documents** › **Choose a file** › **Upload**

To know a document is ready → its card caption reads **Uploaded**

To replace an outdated document → upload the new version, wait for **Uploaded**, then delete the old card

To delete a document → **More actions** on its card › **Delete** (no confirmation, can't be undone)

To add a website → **Upload Documents** › **Website** tab › **Website Url** › **Upload**

To refresh a website or connected source → **More actions** on its card › **Sync**

To sync a website on a schedule → **More actions** › **Schedule sync…** › choose how often › **Save**

To add an FAQ → **Docs** › **FAQ** › **Create FAQ** › **Question** › check **Similar Questions** › **Answer** › **Submit**

To edit an FAQ → **Docs** › **FAQ** › select the FAQ › change the text › **Save**

To delete an FAQ → select the FAQ › **Delete** › **Confirm**

To have the AI agent use a new document or FAQ → ask your Dial AI team to link it to the AI agent's flow

File types: .pdf, .docx, .xlsx, .txt, .htm, .html, .json, up to 200 MB per file.

Troubleshooting

PROBLEM	WHAT TO DO
Search's answer seems wrong.	Open the cited document and read the passage. If the document is wrong or old, tell your Customer Admin so they can replace it.
The answer says its sources disagree.	Open each listed document to find the current one. Tell your Customer Admin which document is out of date.
I can't send a new question.	Wait for the current answer to finish.
A cited document opens in a new tab, not the panel.	Only PDFs open in the panel. Documents from a web page open in a new tab.
Upload Documents is missing.	Document upload isn't turned on for your organization. Ask your Dial AI team.
The file I want isn't in the file picker.	Only .pdf, .docx, .xlsx, .txt, .htm, .html and .json files are accepted. Save the file in one of these formats.
"Error: FP1" says the file is over the upload limit.	Split the document into smaller files, one topic each.
A card shows Failed upload.	Check that the file opens on your computer, delete the failed card, then upload the file again. If it fails again, contact your Dial AI team.
Delete shows "Failed to delete file" and "The document is currently used by a flow".	The AI agent uses this document with customers. Ask your Dial AI team to link the replacement, then delete the old one.
I deleted the wrong document.	Deleting can't be undone. Upload the file again. If the AI agent used it, tell your Dial AI team so they can link it again.
Sync shows "Cannot sync this type of document."	The document is an uploaded file. Replace it instead.
Sync shows "Sync currently in progress".	Wait a few minutes, then try again.

Sync on a website shows "Can't refresh from sitemap".	The site has no usable sitemap. Select **More actions** › **Full re-crawl** to read the whole site again.
The Website tab is grayed out.	Website sources aren't set up for your organization. Ask your Dial AI team.
Save on an FAQ is grayed out.	You haven't changed anything yet. Hovering over it shows "No changes to save".
The AI agent doesn't use a document or FAQ I added.	The AI agent only uses documents and FAQs linked to its flow. Ask your Dial AI team to link it.

Glossary

TERM	MEANING
Cited document	A document that Search used for its answer, listed under **Documents:**
Connected source	A document that stays linked to where it lives, such as a website or SharePoint library, and can be refreshed with **Sync**
Document library	The **Docs** › **Manage** page, with a card for every document your organization has added
FAQ	One common question with one short, definite answer
Flow	What the AI agent follows in a conversation. The AI agent uses the documents and FAQs linked to its flow.
Similar Questions	The panel that lists existing FAQs close to the one you're writing or editing, each with a score
Sync	Pull the latest changes from a connected source into the library

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