



PLATFORM HANDBOOK

Getting started

Sign in, find your way around the platform, and see which handbook covers each part of your work.

CSR

Supervisor

Customer Admin

Tester

Contents

Overview

01 Sign in

- Set up your sign-in
 - Sign out
 - Sign in
-

02 Find your way around

- Use the left menu
-

03 The tabs

- Watch conversations in Monitor
 - Control when the AI agent answers in Agent
 - Reach customers first with Outbound
 - Keep the AI agent's knowledge current in Docs
 - Manage your team in Settings
 - Check the AI agent's work in Build
 - Get AI help from Assistant
-

04 Roles

05 Getting help

- Find help
-

Quick reference Troubleshooting Glossary

Overview

The Dial AI platform is where your team works alongside the AI agent that answers your customers by phone, chat, text and email. Here you watch how the AI agent is doing, step in when a customer needs a person, keep its knowledge current, and check its work.

This handbook is for everyone on your team. It shows you how to sign in, how the screen is laid out, what each tab in the left menu is for, and who on your team uses it. Each tab has its own handbook with the step-by-step tasks.

NOTE What you see depends on your role. Your left menu shows only the tabs and pages your role allows, so it may be shorter than the pictures in this handbook.

01 Sign in

You sign in with your work email. Use a current desktop browser, such as Chrome or Edge.

01 Set up your sign-in

03 Sign out

02 Sign in

Set up your sign-in

When your Customer Admin or your Dial AI team adds you to the platform, you get an email with a link to set up your sign-in.

1. Open the email and select the link. A page opens where you set your password.
2. Follow the steps on the page. When you finish, the platform opens.
3. Bookmark the platform's address, so you can find it again.

TIP If the email doesn't arrive, check your junk folder. Then ask your Customer Admin to check the email address they entered.

Sign in

- 1 Open the platform address your Dial AI team gave you. The **Sign In** page opens.
- 2 Enter your work email and your password.
- 3 Select **Sign In**. The platform opens.

NOTE If your organization signs in with its own work accounts, the **Sign In** page shows a button for that. Select it and sign in the way you do for your other work apps.

TIP If you forget your password or can't sign in, ask your Customer Admin or your Dial AI team for a new sign-in link.

Sign out

- 1 At the bottom of the left menu, select your name. A menu opens.
- 2 Select **Log out**, then confirm. The **Sign In** page opens.

TIP The same menu has **Theme**, where you choose a light or dark screen, or let it follow your computer.

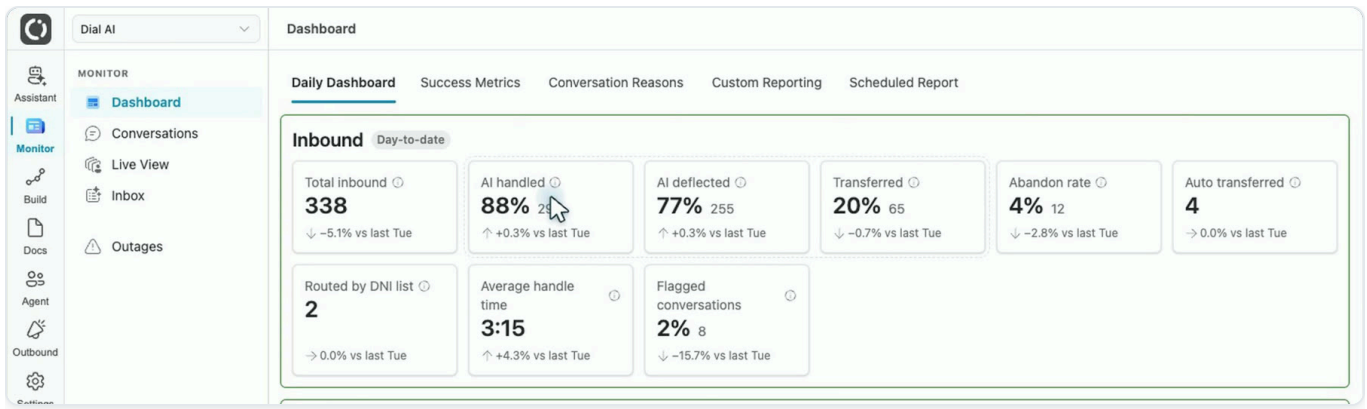
02 Find your way around

Every page has the same layout: the left menu on the left, and the page you're working on to its right.

Use the left menu

The left menu has two parts. A narrow strip of tabs runs down the far left. Beside it, a list shows the pages of the tab you're in.

1. Select a tab, such as **Monitor**. Its pages appear beside it: **Dashboard**, **Conversations**, **Live View**, **Inbox** and **Outages**.
2. Select a page, such as **Dashboard**. The page opens on the right.

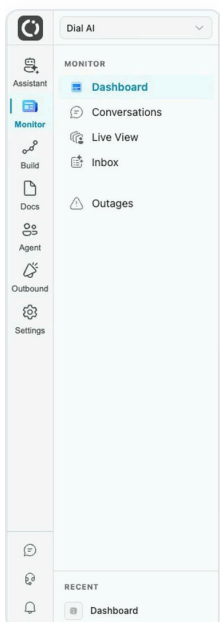


The platform with Monitor open: the tabs on the far left, the Monitor pages beside them, and the Dashboard on the right.

The tabs appear on screen in this order: **Assistant**, **Monitor**, **Build**, **Docs**, **Agent**, **Outbound** and **Settings**. This handbook goes through them in the order most people learn them.

What else is in the left menu

- **Your organization's name** sits at the top of the menu. If you work for more than one organization on the platform, select it to switch.
- **Recent** lists the pages you opened last, so you can go back quickly.
- **Pin a page:** point to a page in the list and select its star. The page stays at hand as an icon in the strip of tabs. Select the star again to unpin it.
- At the bottom of the strip you find **Ask AI** (if your role includes it), **Softphone** (if your team takes calls in the browser), **Notifications** and **Help**.
- **Your name** is at the very bottom. Select it to change the theme or log out.



The left menu up close: the strip of tabs, the Monitor pages, the Recent list and the buttons at the bottom.

TIP Press **Ctrl+B** (⌘+B on a Mac) to hide or show the list of pages and give the page more room.

03 The tabs

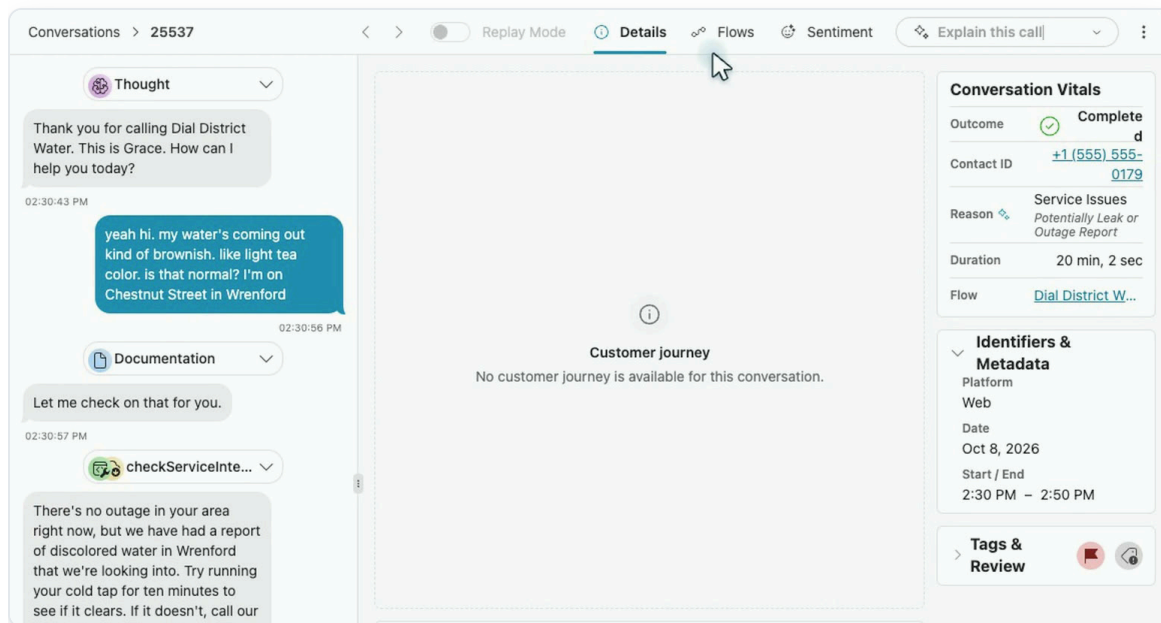
Each tab below has a short description, the people who use it most, and the handbook that teaches it. Start with Monitor, then follow the handbooks for your role.

- 01 Watch conversations in Monitor
- 02 Control when the AI agent answers in Agent
- 03 Reach customers first with Outbound
- 04 Keep the AI agent's knowledge current in Docs
- 05 Manage your team in Settings
- 06 Check the AI agent's work in Build
- 07 Get AI help from Assistant

Watch conversations in Monitor

Monitor is where most of your day happens. **Dashboard** shows how the AI agent is doing today and over time. **Conversations** holds every call, chat, text and email: open one to read the transcript, hear the recording, and see the flow the AI agent followed. **Live View** lets you listen in on calls as they happen. **Inbox** is where CSRs take over conversations that need a person. **Outages** is where you post a main break or other service interruption, so the AI agent can tell callers about it. Customer Admins and Testers also open conversations here to see how the AI agent handled them.

Covered in the **Monitor** handbook.

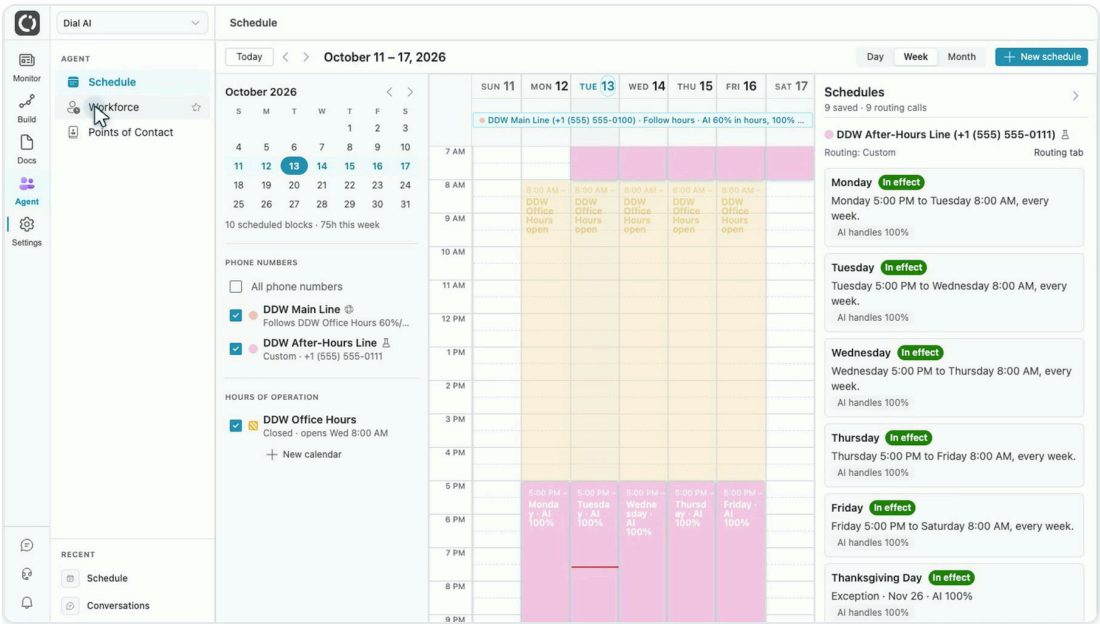


One conversation in Monitor: the transcript on the left and the conversation's details on the right.

Control when the AI agent answers in Agent

Agent controls when the AI agent answers. **Schedule** sets your AI hours for each phone number: the share of calls the AI agent takes at each time of day, plus holidays and after-hours. **Workforce** shows your team's coverage next to the AI agent's. **Points of Contact** lists the phone numbers, chats and email addresses the AI agent answers.

Covered in the **Agent** handbook.



Agent > Schedule: the week's AI hours on a calendar, with the schedules for each phone number listed on the right.

Reach customers first with Outbound

Outbound is for contacting customers before they contact you. A campaign on the **Campaigns** page calls, texts or emails a list of customers within the hours you choose. A high-usage alert is a good example. Each contact shows how it went, with a transcript. Campaigns always skip numbers on your Do-Not-Call list.

Covered in the **Outbound** handbook.

The screenshot displays the 'Outbound' section of the Dial AI interface. The top bar shows 'Dial AI' and a 'New Outbound' button. The main area is titled 'Outbound Campaigns' and contains a list of campaigns. The first campaign is 'Paperless billing invitation' with a status of 'Paused' and a batch size of 5. The second campaign is 'High usage - possible leak alert' with a status of 'Paused' and a batch size of 5. The interface also shows a 'New Outbound' button in the top right corner.

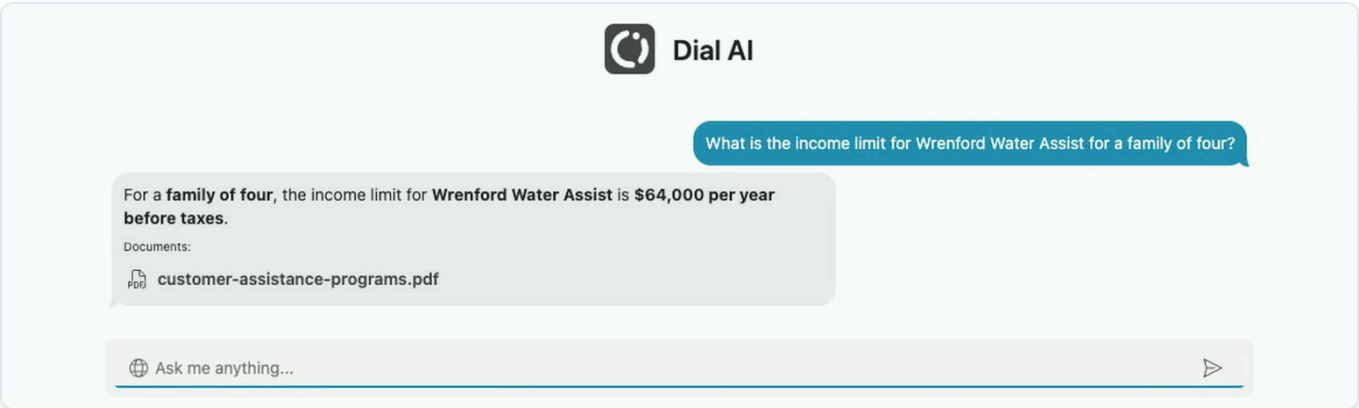
Name	Type	Status	Batch Size	Created	Flow	Scheduler
Paperless billing invitation	📧	Paused	5	Oct 8, 2026	Dial District Water — Paperless Invitation	🗑️
High usage - possible leak alert	📞	Paused	5	Oct 8, 2026	Dial District Water — High Usage Alert	🗑️

Outbound > Campaigns: the list of campaigns with their type, status and flow.

Keep the AI agent’s knowledge current in Docs

Docs holds the knowledge the AI agent answers from. **Search** lets anyone ask a question and see the answer with the document it came from. **Manage** is where you add and update documents. **FAQ** holds short answers to common questions. Keep them current, and the AI agent stays accurate.

Covered in the **Docs** handbook.

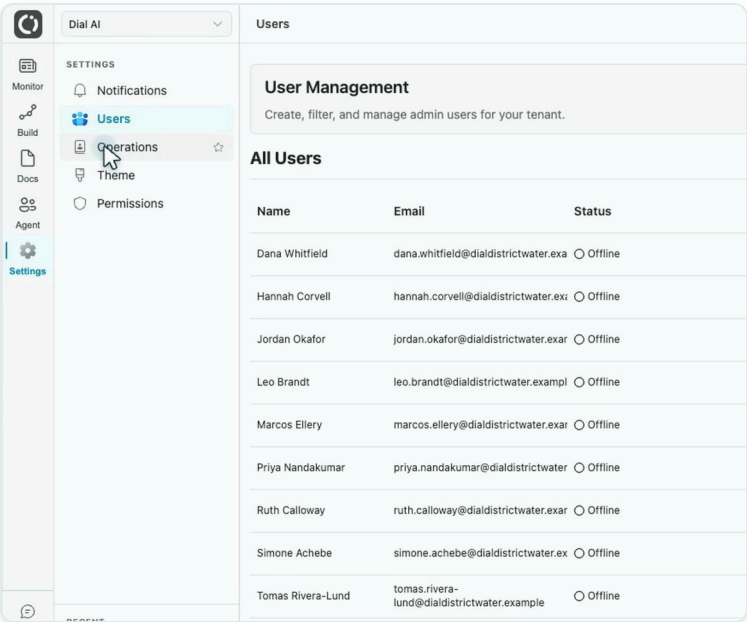


Docs > Search: a question about Wrenford Water Assist, answered with the document it came from.

Manage your team in Settings

Settings is where admins work. **Users** is where you add staff and set their access. **Notifications** controls who gets an alert, and when. **Operations** holds your transfer contacts and Do-Not-Call list. **Theme** sets your colors and logo. CSRs reach their own settings from **Monitor > Inbox**.

Covered in the **Settings** handbook.



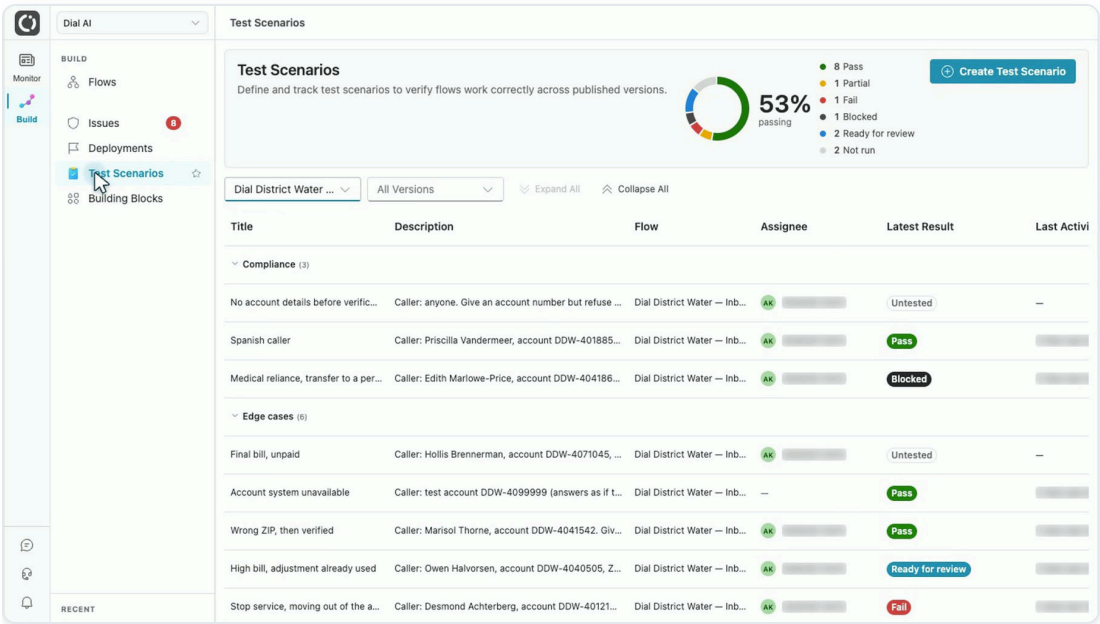
Settings > Users: the Settings pages in the left menu and the list of your team’s users.

Check the AI agent’s work in Build

Build is where you check the AI agent’s work before and after changes. On **Test Scenarios**, testers try each scenario with the AI agent and record whether it passed. **Issues** tracks anything that needs fixing.

Deployments shows how your rollout is going. Testers can also open a flow on **Flows**, read-only, to see the path the AI agent follows, and **Building Blocks** lets you preview the voices the AI agent can use.

Covered in the **Build** handbook.

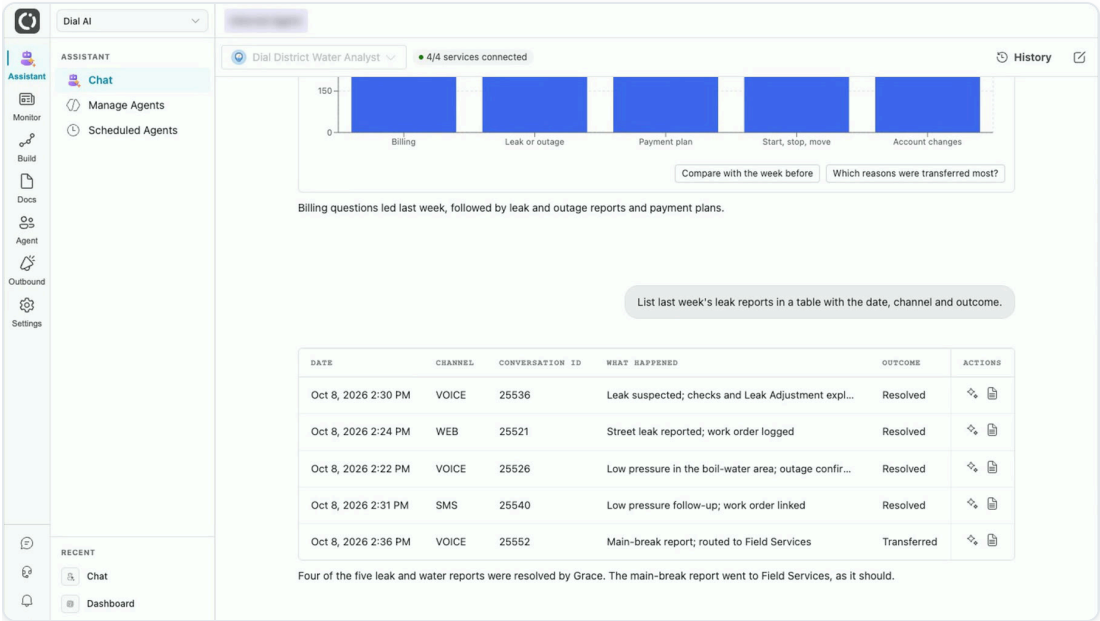


Build > Test Scenarios: scenarios for the Dial District Water flow with their latest results.

Get AI help from Assistant

Assistant holds AI helpers for your team, called analyst agents. Ask them about your conversations and performance in plain English, and get answers as tables, charts and files. Scheduled agents can have a weekly report ready when you start your day. The **Ask AI** button opens the same help over any page.

Covered in the **Assistant** handbook.



Assistant > Chat: an analyst agent's answer, with a bar chart of contact reasons and a table of leak reports.

04 Roles

Your role decides which tabs and pages you see. Your Customer Admin gives you a role when they add you. To change it, ask your Customer Admin.

ROLE	WHAT THIS PERSON TYPICALLY DOES	MAIN TABS	HANDBOOKS TO READ
CSR	Reads the Dashboard, reviews conversations, listens in on live calls, takes over conversations in the Inbox, and searches documents to answer customers.	Monitor, Docs	Monitor, Docs
Supervisor	Everything a CSR does, plus scheduled reports, flag review, coaching on live calls, posting outages, outbound campaigns, team schedules, issues, and analyst agents.	Monitor, Agent, Outbound, Docs, Build, Assistant	Monitor, Agent, Outbound, Docs, Build, Assistant
Customer Admin	Adds users and sets their access, sets up notifications, keeps transfer contacts and the Do-Not-Call list, sets AI hours and workforce, and keeps documents and FAQs current.	Settings, Agent, Docs	Monitor, Agent, Docs, Settings
Tester	Tries the AI agent against each test scenario, records the results, opens the conversations and flows behind them, and reports issues.	Build, Monitor	Monitor, Build

NOTE Some pages appear in your menu because your role needs part of what they hold. If a page isn't in your role's handbooks, you don't need it for your work.

05 Getting help

Help is always close by.

Find help

1. At the bottom of the left menu, select **Help (?)**. A small menu opens.
2. Select **Documentation** to read the platform's guides, or **Support** to contact support.

For anything about your setup, ask your Dial AI team. They set up the AI agent's flows, phone numbers, chats and email addresses, your analyst agents and your scheduled reports, and they can change them for you. For access to a tab or page, ask your Customer Admin.

Quick reference

Everyone

TO...	DO THIS
Sign in	Open your platform address → enter your work email and password → Sign In
Log out	Select your name at the bottom of the left menu → Log out
Switch light or dark screen	Select your name → Theme
Open a page	Select a tab in the left menu → select the page
Go back to a page you just used	Left menu → Recent
Keep a page at hand	Point to the page → select its star
Hide or show the list of pages	Ctrl+B (⌘+B on a Mac)
Get help	Left menu → Help → Documentation or Support

Where to go

TO...	GO TO
See how the AI agent is doing today	Monitor > Dashboard
Read a conversation	Monitor > Conversations
Listen in on a live call	Monitor > Live View
Take over a conversation	Monitor > Inbox
Post an outage	Monitor > Outages
Set when the AI agent answers	Agent > Schedule
Run a campaign	Outbound > Campaigns

Find an answer in your documents	Docs > Search
Add a user	Settings > Users
Record a test result	Build > Test Scenarios
Ask an analyst agent a question	Assistant > Chat , or Ask AI on any page

Troubleshooting

PROBLEM	WHAT TO DO
You never got the email to set up your sign-in.	Check your junk folder. Then ask your Customer Admin to check your email address on Settings > Users .
You forgot your password or can't sign in.	Ask your Customer Admin or your Dial AI team for a new sign-in link.
A tab or page in this handbook is missing from your menu.	Your role doesn't include it. If you need it for your work, ask your Customer Admin.
You see the wrong organization's name at the top of the menu.	Select the name and choose your organization.
The list of pages beside the tabs has disappeared.	Press Ctrl+B (⌘+B on a Mac), or select a tab.
Ask AI is missing.	Your role doesn't include analyst agents. Ask your Customer Admin.
You need a change to the AI agent's flows, phone numbers or analyst agents.	Ask your Dial AI team.

Glossary

TERM	MEANING
AI agent	The virtual agent that answers your customers by phone, chat, text and email.
AI hours	The share of calls the AI agent answers at a given time of day.
Analyst agent	An AI helper for your staff, on the Assistant tab, that answers questions about your conversations and performance.
Ask AI	A button that opens an analyst agent's chat over any page.
Campaign	An outbound list of customers that the AI agent calls, texts or emails within the hours you choose.
Conversation	One call, chat, text or email exchange between a customer and the AI agent.
CSR	Customer service representative: a person on your team who talks with customers.
Do-Not-Call list	Numbers that campaigns never contact.
Flow	The path the AI agent follows in a conversation.
Issue	A tracked item that someone should act on, such as a wrong answer the AI agent gave.
Role	What decides which tabs and pages you see and what you can do on them.
Test scenario	One situation a customer can be in, used to check that the AI agent handles it correctly.



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