

PLATFORM HANDBOOK

Monitor

Watch conversations, read your numbers, and step in when a customer needs a person.

Supervisor

CSR

Customer Admin

Tester

Contents

Overview

01 Dashboard

- Read today's numbers
- Track trends in Success Metrics
- See why customers get in touch
- View a custom report
- Schedule a weekly report
- Change, pause, send or delete a scheduled report

02 Conversations

- Find conversations with filters
- Save a view for your team
- Export conversations to a CSV file
- Read a conversation
- Follow the AI agent's path on the Flows tab
- Get a conversation explained
- Play or download a recording
- Review a flagged conversation
- Tag a conversation
- Follow a customer's journey
- See how the customer felt

03 Live View

- Watch live conversations
- Listen in on a call
- Coach the AI agent during a conversation
- Transfer a call to a person
- Send a conversation to a queue
- Answer a chat, text or email yourself
- End a conversation
- Set up Live View

04 Inbox

- Set up your Inbox
- Set your status
- Accept or reject a conversation
- Approve or redirect an action the AI agent prepares
- Reply to a chat or text
- Answer an incoming call
- Answer an email
- Take over a waiting conversation
- Wrap up a conversation
- Use the customer panel

05 Outages

- Review caller-reported outages
- Post an outage
- Update an outage
- Resolve, invalidate or reopen an outage

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

Overview

The **Monitor** tab is where your team sees what your AI agent is doing and steps in when a customer needs a person. It has five pages:

PAGE	WHAT IT'S FOR
Dashboard	Today's numbers, trends over time, why customers get in touch, and scheduled email reports
Conversations	Every call, chat, text and email, with the transcript, summary, recording and the path the AI agent took
Live View	Conversations happening right now, so you can listen in, coach the AI agent or hand a conversation to a person
Inbox	Where CSRs pick up and answer the conversations routed to them
Outages	Service interruptions you post for the AI agent to share with callers, and the problems customers report

This handbook is for supervisors, CSRs, customer admins and testers. If a button in a task is missing for you, your role doesn't include it. Ask your administrator.

To start, sign in to the platform and select **Monitor** in the left menu. The pages your role can use appear under it.

01 Dashboard

The Dashboard shows how today is going, how things have moved over time, and why customers get in touch. Supervisors also use it to email reports to people who don't sign in.

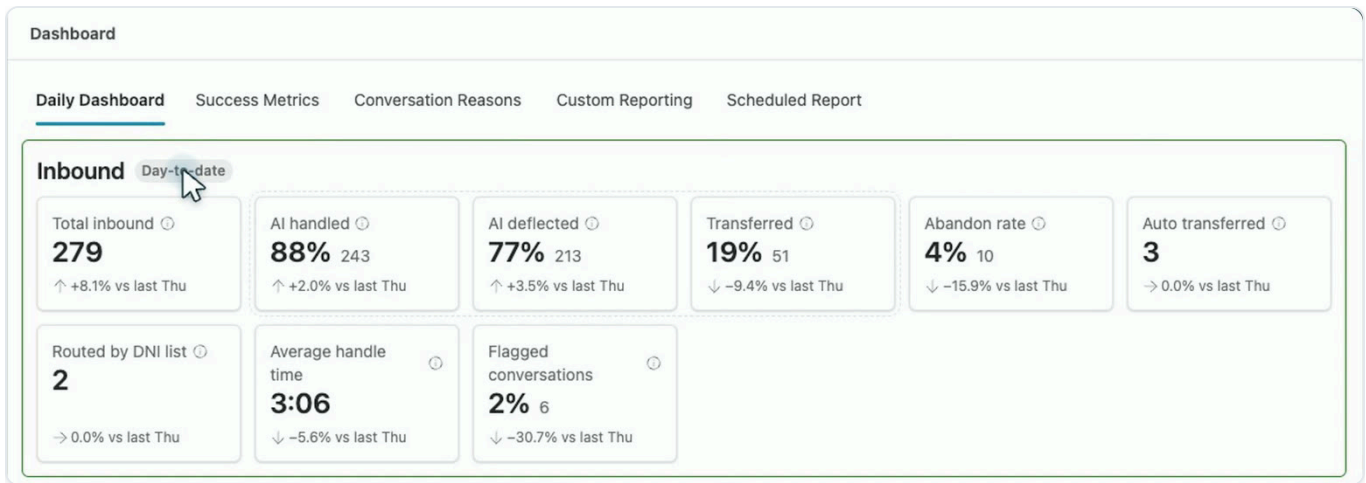
- | | |
|------------------------------------|---|
| 01 Read today's numbers | 04 View a custom report |
| 02 Track trends in Success Metrics | 05 Schedule a weekly report |
| 03 See why customers get in touch | 06 Change, pause, send or delete a scheduled report |

Read today's numbers

The Daily Dashboard answers one question: how is today going? Check it a few times a day, and after anything unusual, such as a main break.

1. Select **Monitor > Dashboard**. The dashboard opens on the **Daily Dashboard** tab.
2. Read the **Inbound** section. It's marked **Day-to-date**, so it counts from midnight until now.

- 3 Under each number, read the change, for example "vs last Thu". It compares today with the same weekday last week, up to the same time of day.
- 4 To see exactly what a card counts, hover over the small info icon beside its name.
- 5 Scroll to **Transfer health**. It shows how today's transfers to your team went: how many were started and completed, how many met a busy line or no answer, and how long callers waited.
- 6 If your team runs outbound campaigns, scroll to **Outbound** to see today's outbound calls.
- 7 Scroll to **Conversation Reasons** to see today's top reasons customers got in touch. Select the arrow beside a reason to see how those conversations ended.
- 8 Scroll to **Snapshot**, marked **Live**. It shows what is happening right now. **Active in Dial AI** is how many conversations are open, and **By Channel** breaks them down by voice, web chat, text and email.
- 9 If your team answers conversations in the Inbox, read **Lifecycle**, **Live Skill Queues** and **Agent Workload**. They show how many conversations are queued, assigned and in wrap-up, and how busy each CSR is.



The Inbound section of the Daily Dashboard, with each card's change from the same weekday last week.

What the Inbound cards mean

CARD	WHAT IT COUNTS
Total inbound	Inbound conversations so far today
AI handled	The share the AI agent took care of: conversations it completed, plus transfers where it did everything the flow asks before handing off
AI deflected	The share the AI agent finished with no person involved, including callers sent to an automated line such as the payments line
Transferred	The share handed to a person on your team
Abandon rate	The share of customers who left before the conversation was resolved
Auto transferred	Conversations sent straight to a person, outside the AI agent's flow. They aren't part of Total inbound .
Routed by DNI list	Callers on your Do-Not-Interact list, sent straight to a person without the AI agent. They're part of Auto transferred .
Average handle time	How long your team spends on a conversation, from assignment to completion
Flagged conversations	The share of today's conversations flagged for review

TIP If **Busy** or **No answer** starts to climb under **Transfer health**, you may be short of people on the phones.

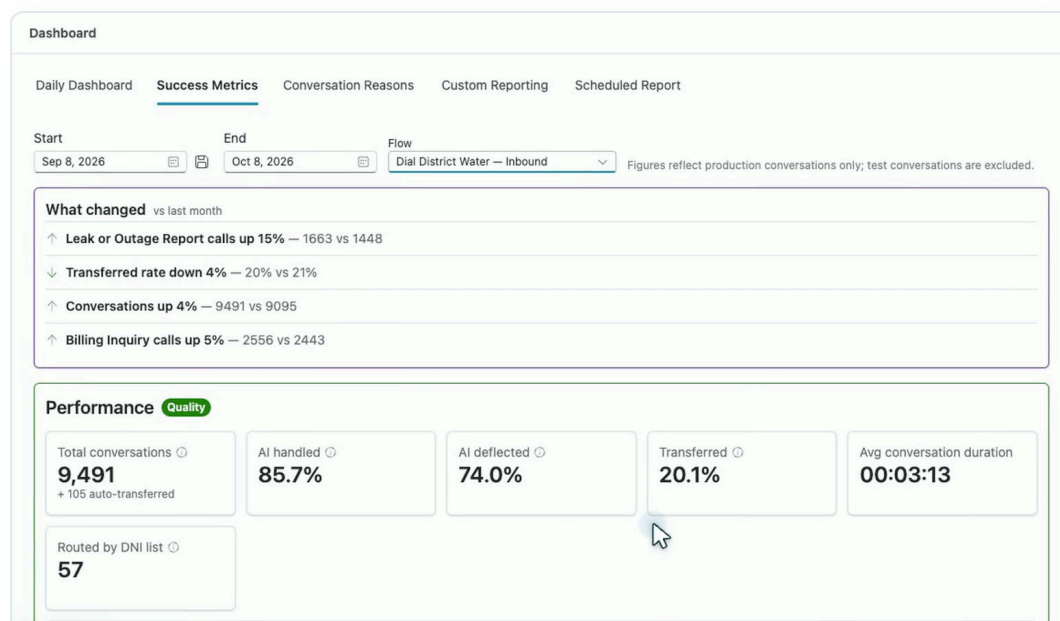
NOTE The **Live** numbers refresh on their own. You don't need to reload the page.

NOTE The Daily Dashboard counts every flow in your organization. For one flow's numbers, use **Success Metrics**.

Track trends in Success Metrics

Success Metrics shows how your numbers moved over a period you choose, for one flow or all of them.

- 1 On the Dashboard, select the **Success Metrics** tab. **Start**, **End** and **Flow** appear at the top.
- 2 Set **Start** and **End** to the period you want. The last 30 days is a good place to start.
- 3 Open **Flow** and choose your flow, for example **Dial District Water – Inbound**. The charts redraw for that flow. With no flow chosen, the page shows all flows.
- 4 Read **What changed**. It sums up the biggest moves compared with the period before, in plain words, such as a lower transfer rate or more leak reports.
- 5 Read the **Performance** tiles for the period at a glance: **Total conversations**, **AI handled**, **AI deflected**, **Transferred**, **Avg conversation duration** and **Routed by DNI list**.
- 6 Read **Resolution Trends** to see how each rate moved, day by day.
- 7 Read **Conversation Volume** to see when customers get in touch. A spike often matches an event, such as the day of a main break.
- 8 Use **Inbound conversations by hour of day** to plan staffing. Hover over any bar to see the exact number.
- 9 Read **Flow Behaviour**. **State Outcomes** shows the steps of the flow where conversations most often ended.

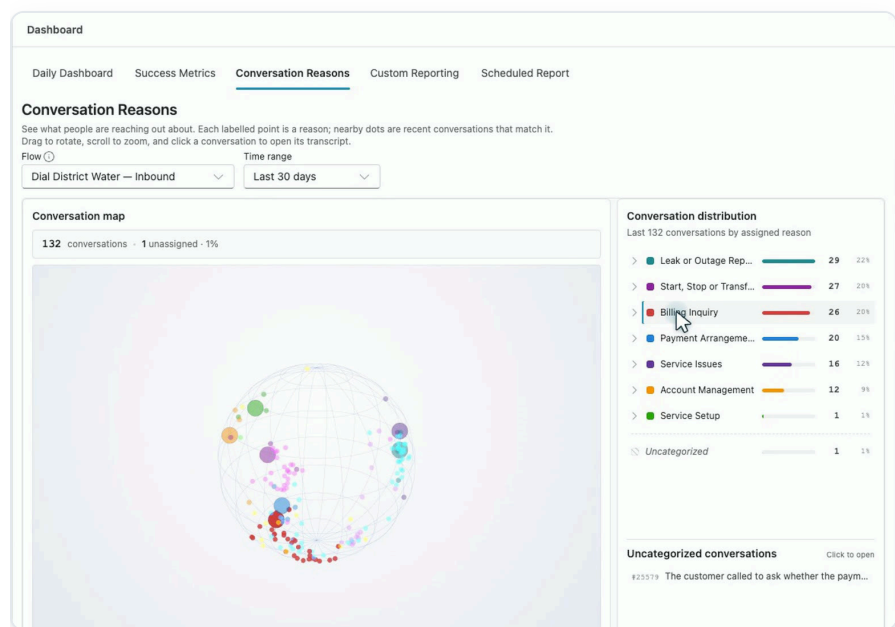


Success Metrics for the Dial District Water flow over 30 days, with What changed and the Performance tiles.

See why customers get in touch

Conversation Reasons groups conversations by why the customer got in touch, such as a billing question or a leak report.

- 1 On the Dashboard, select the **Conversation Reasons** tab. A map and a list appear.
- 2 Under **Flow**, choose your flow, for example **Dial District Water – Inbound**.
- 3 Under **Time range**, choose a period, such as **Last 30 days**.
- 4 Read **Conversation distribution** on the right. It counts recent conversations by reason, for example **Billing Inquiry** or **Leak or Outage Report**.
- 5 Select a reason in the list. Its conversations light up on the **Conversation map**. Each dot is one conversation.
- 6 Drag the map to turn it, and scroll to zoom.
- 7 Select a dot. That conversation's transcript opens.



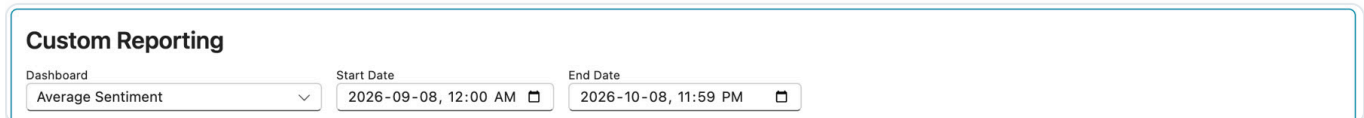
Conversation Reasons for the Dial District Water flow, with Billing Inquiry selected in the list.

TIP Check **Uncategorized** now and then. A big group of uncategorized conversations about the same topic may mean you need a new reason. Ask your Dial AI team to add it.

View a custom report

Custom Reporting shows dashboards built for your organization, such as a weekly view for your leadership team.

- 1 On the Dashboard, select the **Custom Reporting** tab. The **Dashboard** list and two date fields appear at the top.
- 2 Under **Dashboard**, choose the dashboard you want. Its charts appear.
- 3 Set **Start Date** and **End Date**. The charts redraw for that period.

A screenshot of the 'Custom Reporting' interface. It features a title 'Custom Reporting' at the top left. Below it, there are three controls: a 'Dashboard' dropdown menu currently showing 'Average Sentiment', a 'Start Date' field with the value '2026-09-08, 12:00 AM' and a calendar icon, and an 'End Date' field with the value '2026-10-08, 11:59 PM' and a calendar icon.

The Custom Reporting controls: the Dashboard list, Start Date and End Date.

NOTE If the tab says "No dashboards found", none has been set up for you yet. Ask your Dial AI team.

TIP For the rows behind the numbers, export a CSV file from **Conversations**. See "Export conversations to a CSV file".

Schedule a weekly report

A scheduled report emails a summary to the people you choose, on the days you choose. Anyone on the list gets it, even without a sign-in.

- 1 On the Dashboard, select the **Scheduled Report** tab. Your team's reports appear as cards.
- 2 Select **Schedule Report**. The **Create Scheduled Report** dialog opens.
- 3 In **Report Name**, enter a name your team knows, for example "DDW weekly summary".
- 4 In **Recipients (Comma or New Line Separated)**, enter each email address on its own line, for example marcos.ellery@dialdistrictwater.example and dana.whitfield@dialdistrictwater.example.
- 5 Open **Frequency** and choose **Weekly**. The **Days** check boxes appear.
- 6 Under **Days**, select **Mon**.
- 7 In **Send Time**, enter 8:00 a.m. The time is in your computer's time zone.
- 8 Open **Report Window** and choose **7 Days**. Each report then covers the 7 days before it's sent.
- 9 Under **Report Content**, select the sections to include, for example **Conversation Summary**, **Success Metrics** and **Conversation Reasons**.
- 10 Under **Status**, check that the switch shows **Active**. An inactive report is saved but never sent.

- 11 Select **Create**. The dialog closes, and the new card shows who gets the report, when it sends, the time frame it covers, and when it last went out.

Create Scheduled Report

1 **Report Name**
DDW weekly summary

2 **Recipients (Comma or New Line Separated)**
marcos.elery@dialdistrictwater.example
dana.whitfield@dialdistrictwater.example

3 **Frequency**
Weekly

Days
☒ Mon ☐ Tue ☐ Wed ☐ Thu
☐ Fri ☐ Sat ☐ Sun

Send Time
08:00 AM

4 **Report Window**
7 Days

5 **Report Content**
Choose which sections to include in this report.
☒ Conversation Summary
☐ Outbound Summary
☒ Success Metrics
☒ Conversation Reasons
☐ By Platform
☐ Agent Activity

Status
☒ Active

6 **Create**

The Create Scheduled Report dialog filled in for a report every Monday at 8:00 a.m.

TIP Select **Send Now** instead of **Create** to save the report and send the first copy right away. It's a good way to check how the email looks.

Report options

FIELD	CHOICES
Frequency	Daily or Weekly (with the days you pick)
Report Window	12 Hours, 24 Hours, 48 Hours, 7 Days or 1 Month
Report Content	Conversation Summary, Outbound Summary, Success Metrics, Conversation Reasons, By Platform and Agent Activity

Change, pause, send or delete a scheduled report

Each report card has four buttons: **Edit**, **Pause** (or **Resume**), **Send Now** and **Delete**.

- 1 To change a report, select **Edit** on its card. The **Edit Scheduled Report** dialog opens.
- 2 Make your changes and select **Save**.
- 3 To stop a report for a while, select **Pause**. The card's badge changes from **Active** to **Inactive**.
- 4 To start it again, select **Resume**.

- 5 To send a report right now, select **Send Now** on its card. **Last sent** updates on the card.

IMPORTANT Deleting a report can't be undone.

- 6 To remove a report for good, select **Delete** on its card. The **Delete scheduled report** dialog opens.
- 7 Check the report name, then select **Delete**.

02 Conversations

Conversations holds every call, chat, text and email. Open one to read what was said, see what the AI agent did behind the scenes, and check whether anything went wrong.

- | | |
|--|----------------------------------|
| 01 Find conversations with filters | 07 Play or download a recording |
| 02 Save a view for your team | 08 Review a flagged conversation |
| 03 Export conversations to a CSV file | 09 Tag a conversation |
| 04 Read a conversation | 10 Follow a customer's journey |
| 05 Follow the AI agent's path on the Flows tab | 11 See how the customer felt |
| 06 Get a conversation explained | |

Find conversations with filters

1. Select **Monitor > Conversations**. The list opens with the newest conversations first.
2. In the column headers, select the funnel icon beside **Flow**. A list of flows opens.

- 3 Choose your flow, for example **Dial District Water – Inbound**. The list shows only that flow.
- 4 Select the funnel beside **Date**. **Start date** and **End date** appear.
- 5 Set the dates, then select **Apply**. The list shows only that period.
- 6 Use the other column funnels the same way, for example **Platform**, **Status**, **Flagged** or **Tags**. To see only flagged conversations, select the funnel beside **Flagged** and choose **Flagged**.
- 7 Use the row of filters above the list for searches that have no column, such as **Direction**, **Repeat contacts**, **Content**, **Semantic** and **Call reason**.
- 8 To clear one filter, select the **x** beside it. To clear them all, select **Clear all**.

Conversations										
1 Direction Environment Repeat contacts Content Semantic Call reason Clear all 4 Export Compare to last week 3 View: Unsaved changes										
ID	Platform	Contact	Status	Flow	Duration	Last Message	Date	Flagged	Functions	
25631		rafael.okorodunn@ex...			0 min, 42 sec	8 minutes ago	Oct 8, 2026, 2:07 PM			...
25537		+1 (555) 555-0179			20 min, 2 sec	2 hours ago	Oct 8, 2026, 11:30 AM			C R E ...
25588		anselm.becker@exa...			0 min, 59 sec	2 hours ago	Oct 8, 2026, 11:49 AM			C EC ...
25589		elowen.strand@exa...			0 min, 54 sec	2 hours ago	Oct 8, 2026, 11:49 AM			EC ...
25587		theo.marchetti@exa...			1 min, 15 sec	2 hours ago	Oct 8, 2026, 11:48 AM			...
25586		gullpointdental@exa...			1 min, 20 sec	2 hours ago	Oct 8, 2026, 11:48 AM			C ...
25585		odessa.vantonger...			1 min, 8 sec	2 hours ago	Oct 8, 2026, 11:48 AM			S ...
25580		owen.halvorsen@exa...			1 min, 5 sec	2 hours ago	Oct 8, 2026, 11:47 AM			V G E ...

The Conversations list filtered to the Dial District Water flow, with the filter row above it.

TIP **Content** looks for exact words in the transcript. **Semantic** finds conversations by meaning, even when those words were never said. Select **Semantic**, describe the kind of conversation, such as "caller upset about a high bill", and select **Search**. If nothing comes back, lower **Minimum similarity**.

TIP To find customers who keep getting in touch, use **Repeat contacts** and set how many conversations count as repeat.

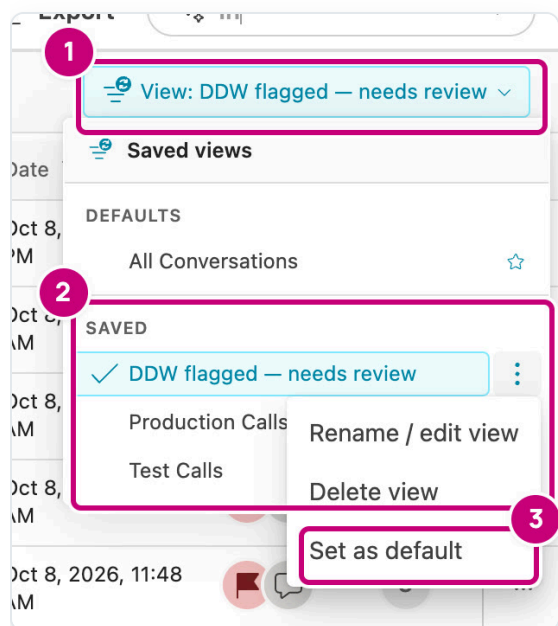
Save a view for your team

A saved view keeps a set of filters, so you can come back to them in one step.

- 1 Set up the filters you want, for example your flow and **Flagged**. The **View:** button at the end of the filter row shows **Unsaved changes**.
- 2 Select the save icon beside the **View:** button.
- 3 Select **Save as new view**. The **Save View** dialog opens.
- 4 In **View name**, enter a clear name, for example "DDW flagged — needs review".
- 5 Select **Save**. The **View:** button now shows your view's name.
- 6 To open a view later, select the **View:** button and choose it under **Saved**.

IMPORTANT Saved views are shared with everyone in your organization. Renaming, overwriting or deleting a view changes it for your whole team. Save your own view instead of changing someone else's.

- 7 (Supervisor) To make a view the one everyone sees first, select **View:**, open the **:** menu beside the view, and select **Set as default**. A star marks the default view.



The saved views list, with the **:** menu open beside a team view showing Set as default.

NOTE **All Conversations**, under **Defaults**, is the built-in view. Select it to clear your filters.

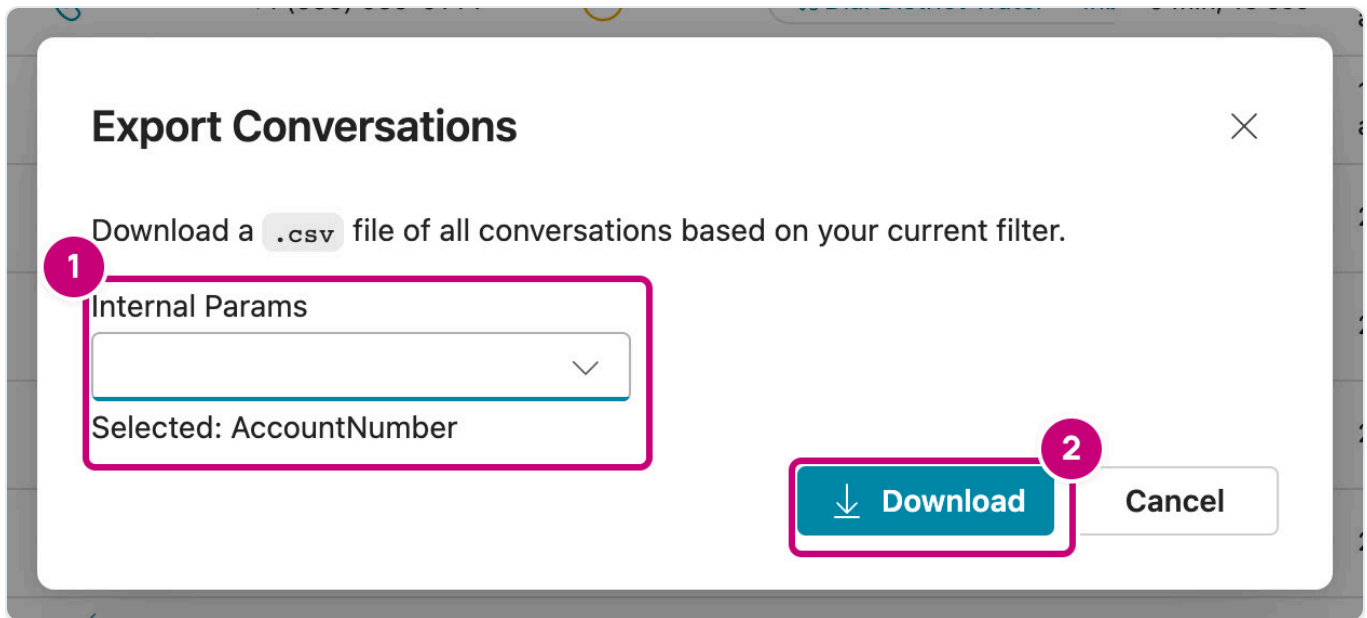
Export conversations to a CSV file

Export downloads the conversations in your current filter as a spreadsheet file.

- 1 Filter the list to what you need, or open a saved view.
- 2 Select **Export**. The **Export Conversations** dialog opens.
- 3 Optional: under **Internal Params**, choose extra details to add as columns, for example an account number.

IMPORTANT The file can contain customer names, phone numbers and account details. Store and share it the way your organization handles customer data.

- 4 Select **Download**. A file named **exported-conversations.csv** downloads.

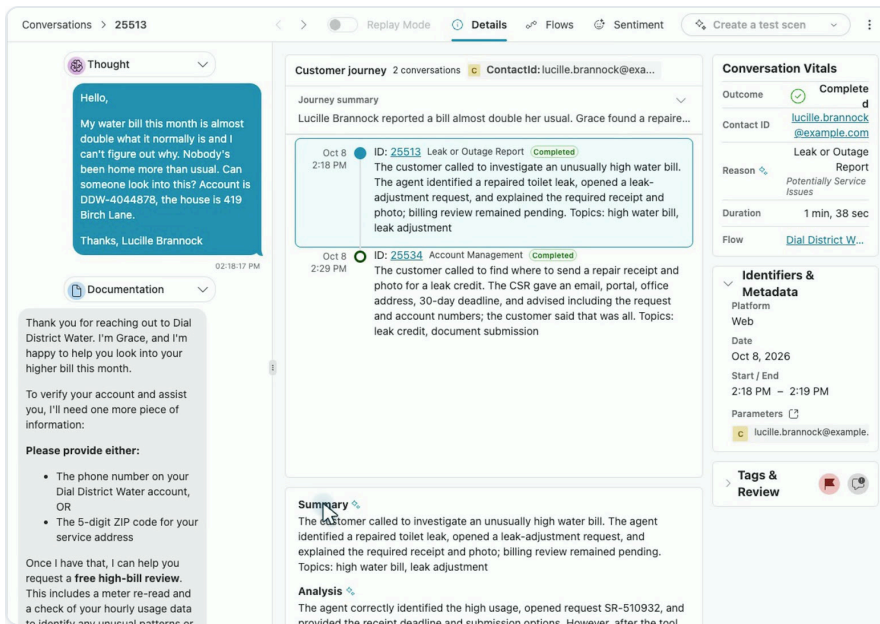


The Export Conversations dialog with an account number added under Internal Params.

Read a conversation

The transcript is the word-for-word record of the conversation. The **Details** tab saves you reading every line.

- 1 In the list, select a conversation. It opens with the messages on the left and the **Details** tab on the right.
- 2 Read the messages from top to bottom. The customer and the AI agent are on opposite sides.
- 3 Between the messages, small rows show what the AI agent did behind the scenes, such as looking up an account. Expand a row to see what the AI agent sent and what came back.
- 4 Look for a **Transfer Suggested** or **Forced Transfer** marker. It shows where the conversation was handed toward a person.
- 5 On the **Details** tab, read **Summary**. It tells the story in a few sentences. Select **Show more** if it's cut off.
- 6 Read **Analysis**. When a conversation is flagged, it explains why.
- 7 Read **Conversation Vitals** for the **Outcome**, the **Contact ID** and the **Reason**, the conversation reason. If the reason is wrong, select it and choose the right one.
- 8 If the conversation has **Key details**, such as an account number, select a value to copy it.
- 9 Select **Identifiers & Metadata** to see the platform, the date, and the start and end times.
- 10 To move to the previous or next conversation in your list, use the arrows at the top.



A conversation with the messages on the left and the Details tab showing the customer journey, Conversation Vitals and the Summary.

TIP If a lookup failed, its row shows it. That often explains why a conversation went wrong.

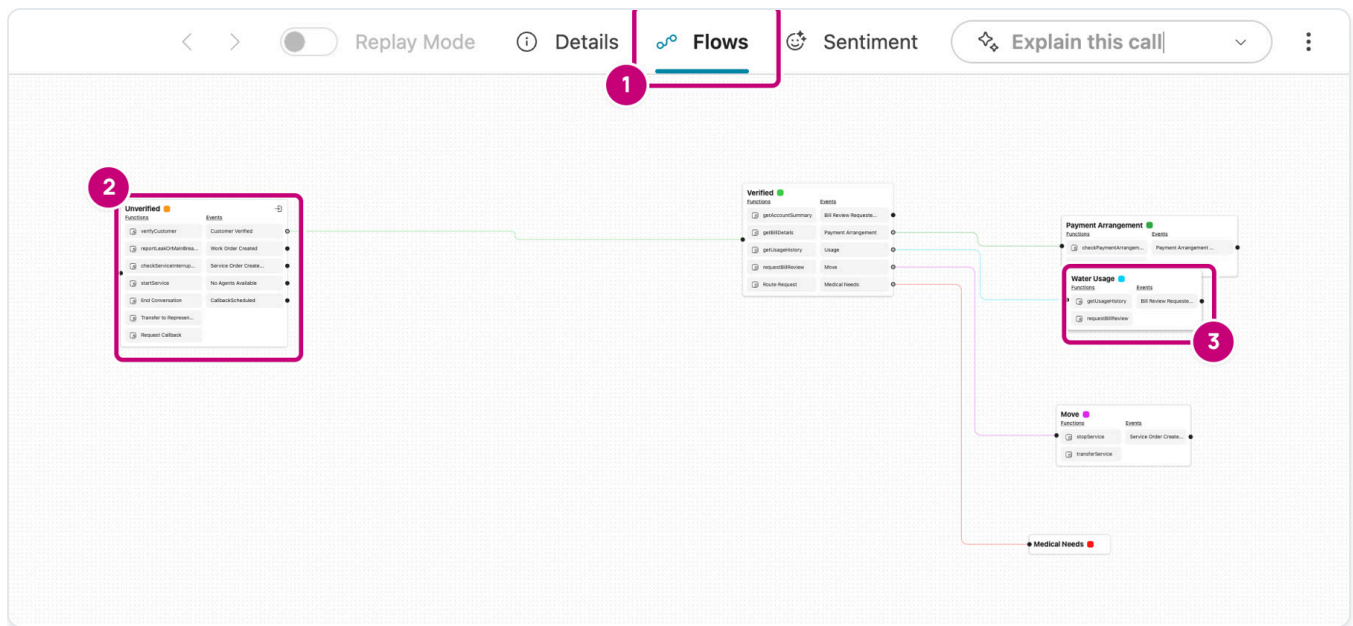
NOTE AI writes the Summary, Analysis and Reason. They're usually right, but the transcript is always the record.

NOTE Card numbers are never shown in full. If a customer reads out or types a card number, the transcript masks it.

Follow the AI agent's path on the Flows tab

A flow is the set of steps the AI agent follows in a conversation. The **Flows** tab shows the flow and where this conversation went in it.

- 1 Open a conversation.
- 2 Select the **Flows** tab. The flow appears as a diagram of steps joined by lines, and it opens on the step the conversation reached.
- 3 Follow the lines to see where the AI agent could go next.
- 4 Drag to move around the diagram, and scroll to zoom.



The Flows tab showing the Dial District Water flow, from the first step to the step this conversation reached.

NOTE You can look at the flow, but you can't change it here. If the flow should behave differently, report an issue or ask your Dial AI team.

NOTE A conversation that didn't run a flow shows "No Flow".

Get a conversation explained

Explain this call asks an analyst agent to walk through what the AI agent did in a conversation, and why.

- 1 Open a conversation.
- 2 Select **Ask AI**, the sparkle button beside the tabs. A short list of tasks opens.
- 3 Select **Explain this call**. A chat panel opens, and the analyst agent writes its explanation.
- 4 Read the explanation. Ask a follow-up question in the chat if you need more.

TIP Try it on a flagged or transferred conversation. Ask, for example, "Why did the AI agent transfer this call instead of setting up the payment arrangement?"

NOTE The explanation is written by AI. Check anything important against the transcript and the **Flows** tab.

Play or download a recording

Phone calls have a recording, which plays on the **Details** tab.

- 1 Open a phone call. The recording player sits on the **Details** tab.
- 2 Select **Play**. The recording starts.
- 3 Select anywhere on the waveform. Playback jumps to that moment.
- 4 Hover over the colored band on the waveform to see how likely the caller was to want a person at that moment.
- 5 To slow down or speed up, select **More Actions**, then **Playback Speed**.
- 6 To save the file, select **More Actions**, then **Download**.

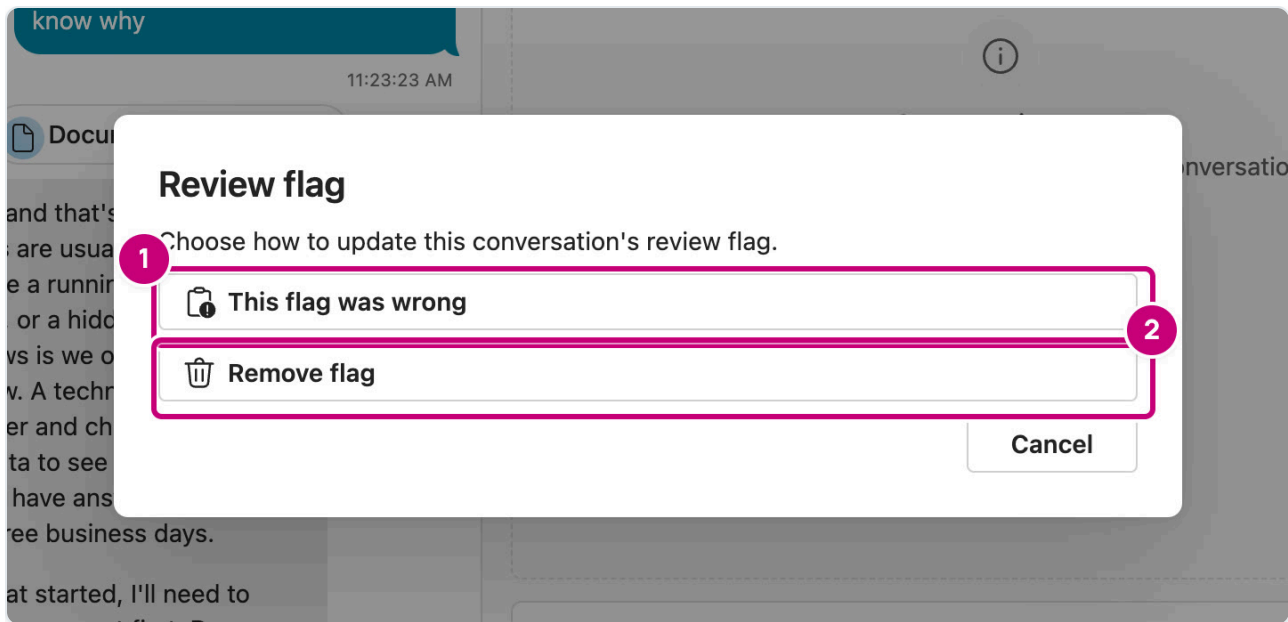
NOTE A red break mark on the waveform, such as "0:47 not recorded", is a gap in the recording. Recording stops while a caller enters card details, so card numbers are never recorded.

TIP You can also download from the Actions menu (:) at the top right. Under **Export**, choose the transcript or the recording.

Review a flagged conversation

After each conversation, an AI reviewer reads it and flags any that need a person to look. A red flag means the reviewer thinks something went wrong. Your job is to check whether it was right.

- 1 On **Conversations**, filter **Flagged** to **Flagged**. The list shows only flagged conversations.
- 2 Open a flagged conversation. The **Details** tab opens.
- 3 Read **Analysis** to see why the reviewer flagged it.
- 4 Read the transcript yourself before you decide.
- 5 If the flag was right, leave it, and deal with the problem through your usual process, such as reporting an issue.
- 6 If the flag was wrong, select **Tags & Review** on the **Details** tab. The section opens.
- 7 Select **Review actions**. The **Review flag** dialog opens.
- 8 (Supervisor) Select **This flag was wrong**. A box opens for your explanation.
- 9 (Supervisor) Explain what the reviewer missed. For example: "The caller asked a general question. The grace period and due date are the same for every customer, so no verification was needed."
- 10 (Supervisor) Select **Record correction**. Your correction is saved and used to improve how this flow's conversations are reviewed.



The Review flag dialog with This flag was wrong and Remove flag.

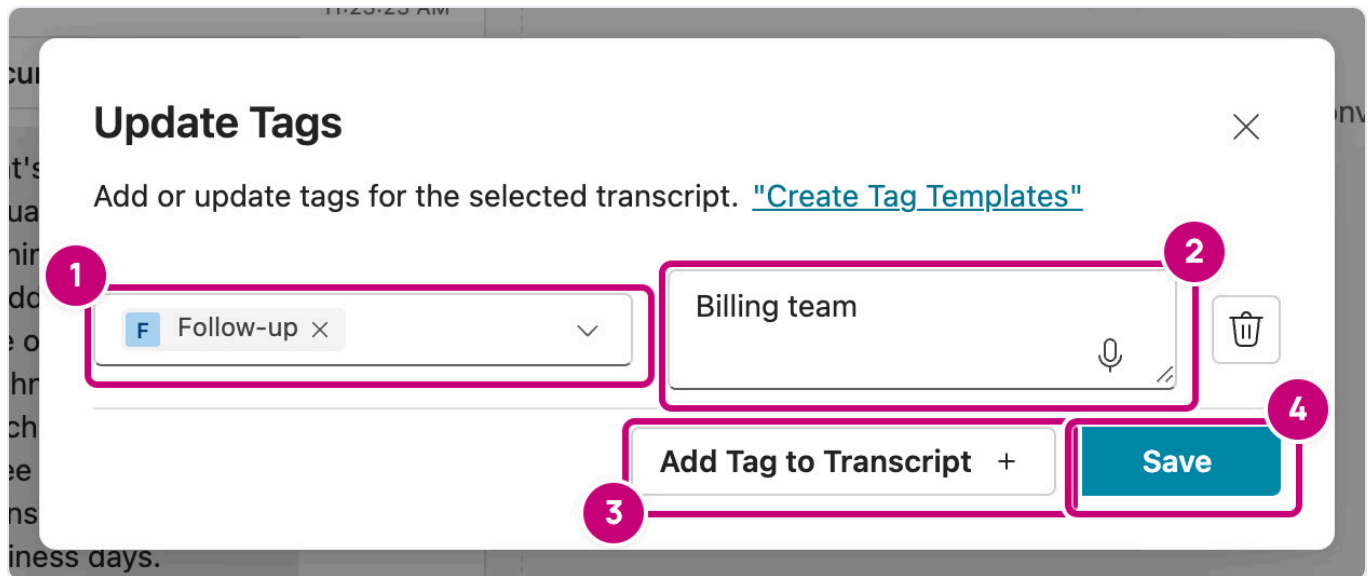
IMPORTANT **Remove flag** deletes the flag and its reason from the conversation and saves no correction. Use **This flag was wrong** when the reviewer made a mistake. Use **Remove flag** once the issue has been dealt with and the flag needs no more attention.

- 11 To clear a flag, select **Review actions**, then **Remove flag**, then confirm. A message confirms the flag and its reason were removed.

Tag a conversation

Tags label a conversation so you can find it later, for example to mark conversations the billing team should follow up.

- 1 Open a conversation. The **Details** tab opens.
- 2 Select **Tags & Review**. The section opens.
- 3 Under **Tags**, select **Add**. If the conversation already has tags, select **Tags** instead. The **Update Tags** dialog opens.
- 4 If no tag row is showing, select **Add Tag to Transcript**. A new row appears.
- 5 Choose a tag key, for example **Follow-up**.
- 6 Enter a value, for example "Billing team".
- 7 Select **Save**. The tag appears under **Tags**.
- 8 To remove a tag, open **Update Tags**, select the delete icon on its row, and select **Save**.



The Update Tags dialog with the tag Follow-up set to Billing team.

NOTE You can only use tag keys your organization has set up for the flow. Ask your Dial AI team to add a new one.

Follow a customer's journey

The customer journey lists every conversation with the same customer, so you can see what happened before and after this one.

- 1 Open a conversation. On the **Details** tab, **Customer journey** sits in the middle.
- 2 Read the journey. Each conversation with this customer appears in order, with its reason, outcome and a short summary.
- 3 Read **Journey summary** for the whole story in one line. Expand it to read more.
- 4 Select a conversation number to open that conversation.
- 5 To see every conversation from this phone number or email address, select the **Contact ID** under **Conversation Vitals**. The list opens in a new tab.

Customer journey 2 conversations c ContactId: lorcan.whitlow@examp...

Journey summary

Lorcan Whitlow first note in about his bill but could not be verified, and was p...

Oct 8 2:31 PM

ID: [25542](#) Account Management Completed

The customer called to check their bill amount. Account verification failed with the provided account number and ZIP code, then house number; the customer became frustrated, declined a representative, and ended the call after being directed to an online account portal. Topics: bill inquiry, accou...

Oct 8 2:42 PM

ID: [25571](#) Billing Inquiry Completed

The customer called to ask whether paying a water bill a few days late would incur a fee. The agent gave specific grace-period, due-date, and late-fee information without verification or a supporting lookup, and the customer ended the call. Topics:

A customer journey with two conversations and the journey summary at the top.

TIP In the Conversations list, you can also open a row's ⋮ menu and select **Past Contacts**.

TIP (Supervisor, CSR) To leave a note on the journey, such as "Called back about the disconnect notice, arrangement set up", open the Actions menu (:) and select **Add Note**.

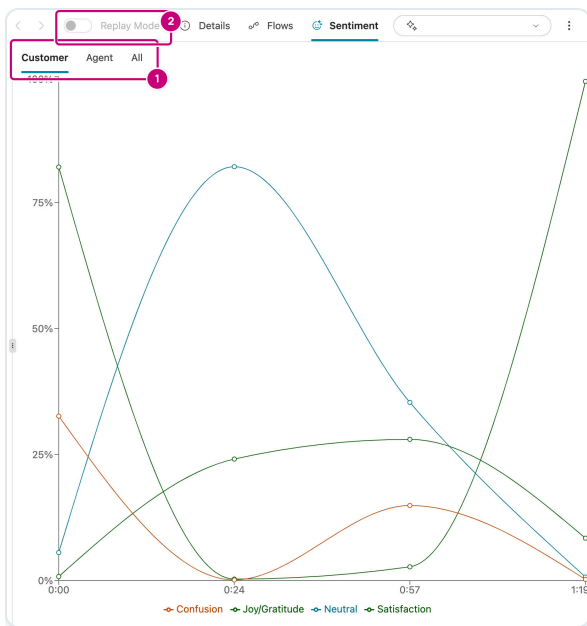
See how the customer felt

The **Sentiment** tab charts emotions over the conversation, such as confusion, satisfaction or gratitude. It helps you find the moment a conversation turned.

- 1 Open a conversation and select the **Sentiment** tab. The chart appears.
- 2 Select **Customer**, **Agent** or **All** to choose whose emotions you see. **Agent** means the AI agent.
- 3 On a phone call, turn on **Replay Mode** at the top. The recording plays while the transcript builds line by line, which is a good way to show a new team member how a call unfolded.

Dial AI · Monitor handbook

18



The Sentiment tab with the Customer view selected and the Replay Mode switch at the top.

03 Live View

Live View lists every conversation happening right now, on every channel. From here you can listen to a call, coach the AI agent, or hand a conversation to a person.

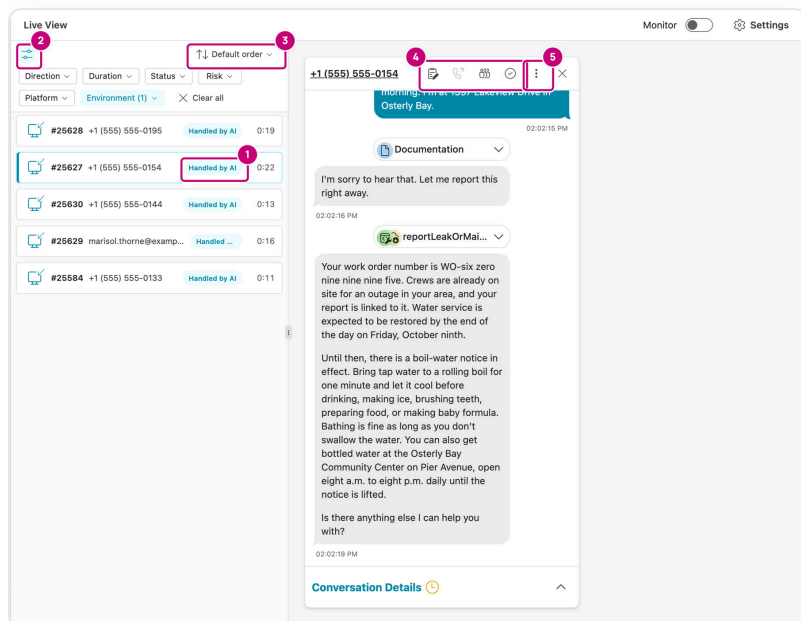
- | | |
|---|--|
| 01 Watch live conversations | 05 Send a conversation to a queue |
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Watch live conversations

1. Select **Monitor > Live View**. Each live conversation appears as a card with its channel, conversation number, customer, status and how long it has run.
2. Read the status on each card. It tells you who has the conversation: **Handled by AI**, **In queue**, **Assigned to CSR**, **Taken over by CSR** or **On hold**.

- 3 Watch the card's color on calls. A red or amber tint means a high or medium risk that the caller wants a person.
- 4 To narrow the list, select **Show filters**. Use **Direction**, **Duration**, **Status**, **Risk** or **Platform**.

- 5 To change the order, open the sort menu and choose **Longest first**. Long conversations are often where callers need help.
- 6 Select a card. The conversation opens beside the list, and its transcript follows the conversation as it happens.
- 7 Optional: select more cards. They open side by side.
- 8 To open the full conversation page, select the number on the card.
- 9 To close a panel, select **Close conversation** (the X).



Live View with the list of live conversations on the left and one conversation open on the right.

TIP Filters stay in place, so you can leave Live View open on a second screen.

NOTE The buttons in a conversation's header are icons. Hover over one to see its name: **Add Coaching**, **Transfer**, **Enqueue** and **End**. The Actions menu (:) holds the rest.

NOTE If the list says "No Conversations", there are no live conversations, or none match your filters.

Listen in on a call

Listening in lets you hear a live call in your browser. The caller and the AI agent don't hear you.

- 1 In Live View, select a phone call's card. Its panel opens.
- 2 In the panel header, open the Actions menu (:).
- 3 Select **Listen In**. The call's audio plays in your headset.

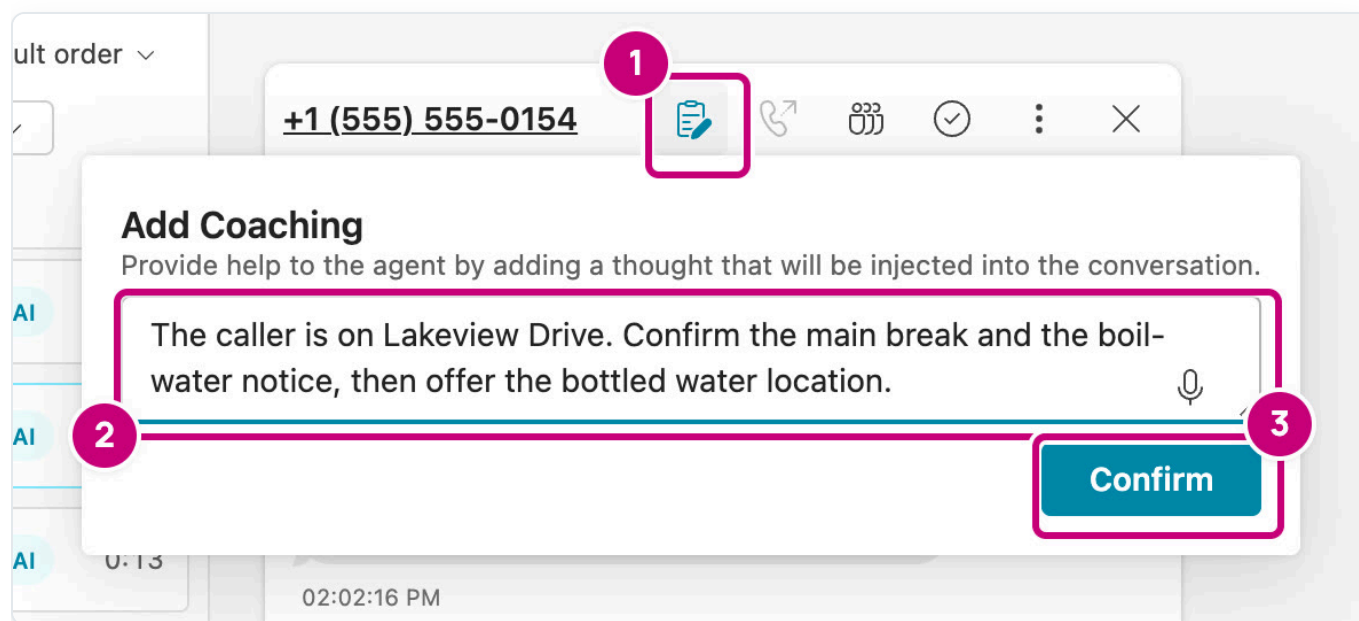
- 4 To stop, open the Actions menu again and select **Stop Listening**.

NOTE **Listen In** works on phone calls only. It isn't available while a call waits in the queue or is in wrap-up.

Coach the AI agent during a conversation

Coaching sends the AI agent a private instruction in the middle of a conversation. The customer never sees or hears it.

- 1 Open a live conversation in Live View.
- 2 In the panel header, select **Add Coaching**. A box opens.
- 3 Enter a short instruction, for example: "The caller is on Lakeview Drive. Confirm the main break and the boil-water notice, then offer the bottled water location."
- 4 Select **Confirm**. A message says "Coaching added."



The Add Coaching box open over a live conversation, with an instruction typed in.

The AI agent uses the coaching on its next reply. The coaching shows as its own event in the transcript, so anyone reviewing the conversation later knows you stepped in.

NOTE You can't coach a conversation that a person is handling, or one that has ended.

Transfer a call to a person

Transfer hands a live phone call to one of your team's contacts, such as Field Services Dispatch. It works on phone calls only.

IMPORTANT The call leaves the AI agent right away. Check the contact before you confirm.

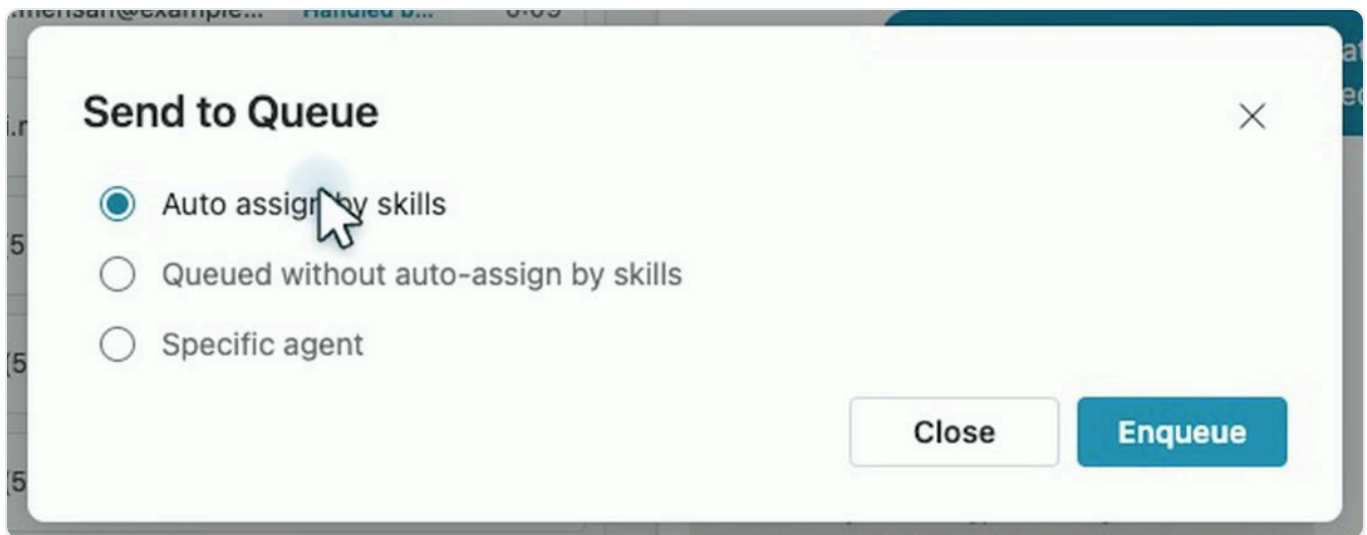
- 1 Open a live phone call in Live View.
- 2 In the panel header, select **Transfer**. The **Transfer Call** dialog opens and asks "Which contact would you like to transfer the call to?"
- 3 Choose a contact, for example **Field Services Dispatch**.
- 4 Select **Confirm**. A message shows the transfer starting, then confirms it.

NOTE The contacts come from your organization's Contact Book. If a contact is missing, ask your customer admin to add it.

Send a conversation to a queue

Sending a conversation to a queue hands it to your team's Inbox.

- 1 Open a live conversation in Live View.
- 2 In the panel header, select **Enqueue**. The **Send to Queue** dialog opens.
- 3 Choose how to route it:
 - **Auto assign by skills**: the next available person with the right skills gets it.
 - **Queued without auto-assign by skills**: it waits in the queue for anyone to take it.
 - **Specific agent** (Supervisor): choose a person under **Select agent**, for example Simone Achebe for a billing question.
- 4 Select **Enqueue**. The card's status changes to **In queue** or **Assigned to CSR**.



The Send to Queue dialog with its three routing choices.

NOTE On this screen, "agent" in **Specific agent** and **Select agent** means a person on your team, not the AI agent.

Answer a chat, text or email yourself

Self Assign takes a chat, text or email from the AI agent so you can answer it yourself.

- 1 Open a live chat, text or email in Live View.
- 2 Open the Actions menu (:) and select **Self Assign**. The conversation is assigned to you.
- 3 Reply from your **Inbox**. See "Reply to a chat or text".
- 4 When the AI agent can carry on, open the Actions menu and select **Return to AI**. The AI agent picks the conversation back up.

NOTE **Self Assign** isn't available on phone calls. For a call, use **Transfer** or **Enqueue**.

End a conversation

IMPORTANT Ending a conversation hangs up the call or closes the chat for the customer. It can't be undone. Use it only when the conversation is truly over.

- 1 Open the live conversation in Live View.
- 2 In the panel header, select **End**. The **End Conversation** dialog asks you to confirm.
- 3 Select **Confirm**.

Set up Live View

Two controls at the top right change how Live View behaves.

- **Monitor** is a switch that turns on monitoring mode. Live conversations are shared out among everyone monitoring and open on their own. When you turn it off, your open conversations go to the other monitors. It also turns off on its own if the browser tab stays hidden for a minute.
- **Settings** opens **Live View Settings**. **Auto Open** opens new conversations as they appear, **Audio Alert** plays a sound for each new one, **Auto Clear** removes conversations when they finish, and **Max Conversations** limits how many open at once.

04 Inbox

The Inbox is where CSRs pick up the conversations routed to them: calls, chats, texts and emails, all in one place.

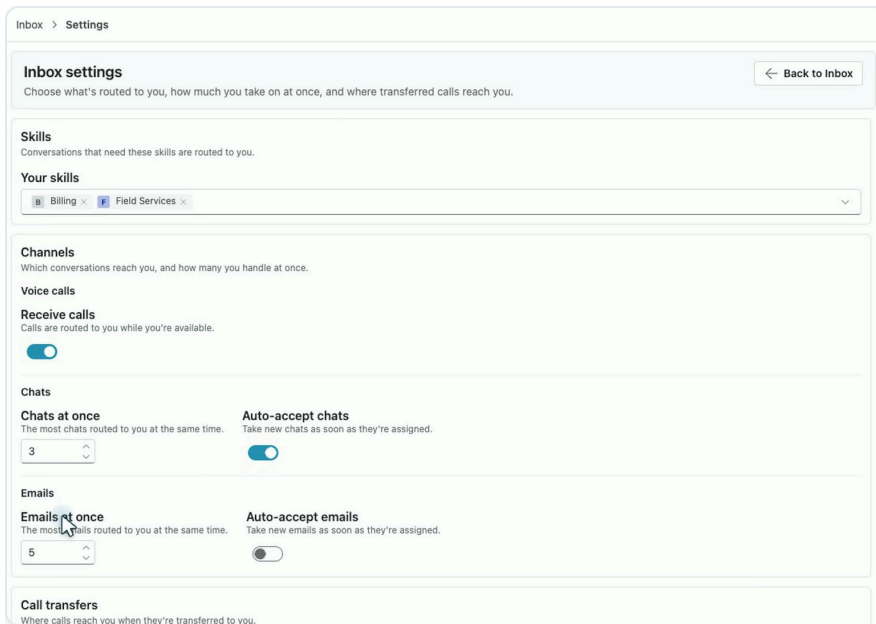
- | | |
|--|-------------------------------------|
| 01 Set up your Inbox | 06 Answer an incoming call |
| 02 Set your status | 07 Answer an email |
| 03 Accept or reject a conversation | 08 Take over a waiting conversation |
| 04 Approve or redirect an action the AI agent prepares | 09 Wrap up a conversation |
| 05 Reply to a chat or text | 10 Use the customer panel |

Set up your Inbox

Your Inbox settings decide which conversations reach you and how many you take at once.

1. Select **Monitor > Inbox**, then select **Configure Inbox**. The **Inbox settings** page opens.
2. Under **Skills**, check **Your skills**. Conversations that need these skills are routed to you.

- 3 Under **Channels**, turn on **Receive calls** to take phone calls.
- 4 Set **Chats at once** and **Emails at once** to how many you can handle together.
- 5 Optional: turn on **Auto-accept chats** or **Auto-accept emails** to take new ones as soon as they're assigned.
- 6 Under **Call transfers**, enter a **Mobile phone number** if transferred calls should ring your phone. Leave it empty to take calls in the browser.
- 7 Select **Save**.
- 8 Select **Back to Inbox**. The Inbox opens again.



The Inbox settings page with skills, channels and limits.

Set your status

Your status decides whether new conversations reach you.

- 1 In the Inbox, next to **Set Status:**, open the status menu.
- 2 Choose **Available** to start receiving conversations.

IMPORTANT When you choose **Busy** or **Offline**, new conversations go to your teammates, and any conversations routed to you by skill go back to the queue.

- 3 Taking a break? Choose **Busy**. At the end of your shift, choose **Offline**.



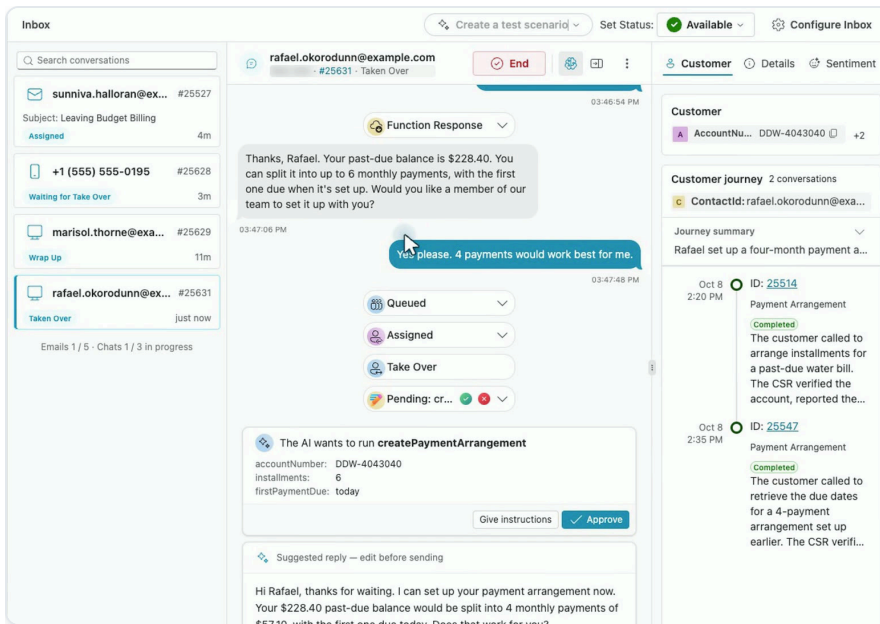
The status menu open with Available, Busy and Offline, beside Configure Inbox.

NOTE You stay available only while the platform is open, so keep the tab open during your shift.

Accept or reject a conversation

Your conversations line up on the left. Each card shows the channel, the customer, the status and how long it has waited.

- 1 In the queue, select a conversation. It opens in the middle of the page, with the customer's details on the right.
- 2 Read the conversation so far, and the customer panel. **Customer** shows their account details and their journey with you. Reading it first saves the customer from repeating themselves.
- 3 Select **Accept** to take the conversation. You can now reply.
- 4 If you can't take it, select **Reject**. It goes back to the queue for the next person with the right skills.



The Inbox with the queue on the left, a web chat open in the middle and the customer panel on the right.

TIP To find a conversation by name or number, type in **Search conversations** above the queue.

TIP To skip accepting, turn on auto-accept in **Configure Inbox**.

NOTE The line under the queue shows how many chats and emails you have in progress, out of your limit.

Approve or redirect an action the AI agent prepares

Sometimes the AI agent prepares an action, such as setting up a payment arrangement, and waits for a person to approve it. Nothing happens until you approve.

- 1 Find the card that starts "The AI wants to run". It shows the action and its details, such as the number of installments.
- 2 Check the details against what the customer asked for.
- 3 If it's right, select **Approve**. The AI agent carries it out.
- 4 If it needs a change, select **Give instructions**. The **Give the AI instructions** box opens.
- 5 Enter what to change, for example "Set up 4 installments, not 6."
- 6 Select **Send instructions**. The AI agent prepares a new version for you to check.

The AI wants to run **createPaymentArrangement**

accountNumber: DDW-4043040
installments: 6
firstPaymentDue: today

Give instructions Approve

Suggested reply — edit before sending

Hi Rafael, thanks for waiting. I can set up your payment arrangement now. Your \$228.40 past-due balance would be split into 4 monthly payments of \$57.10, with the first one due today. Does that work for you?

B I [List Icons] [Copy Icon] Discard Regenerate Send

A payment arrangement waiting for approval, with Give instructions and Approve, and the AI agent's suggested reply below it.

Reply to a chat or text

- 1 Accept or take over the chat. The reply box at the bottom shows the AI agent's suggested reply, marked "Suggested reply — edit before sending".
- 2 Read the suggestion and edit it so it sounds like you.
- 3 Select **Send**, or press **Enter**. Your reply reaches the customer.
- 4 To clear the box, select **Discard**.

TIP Press **Shift + Enter** for a new line without sending.

NOTE If the AI agent drafts a newer suggestion while you're typing, "A new suggested reply is ready" appears. Select **Replace my reply** to use it.

NOTE (Supervisor) To get a different suggestion, select **Regenerate**, say what to change, and select **Regenerate** again.

Answer an incoming call

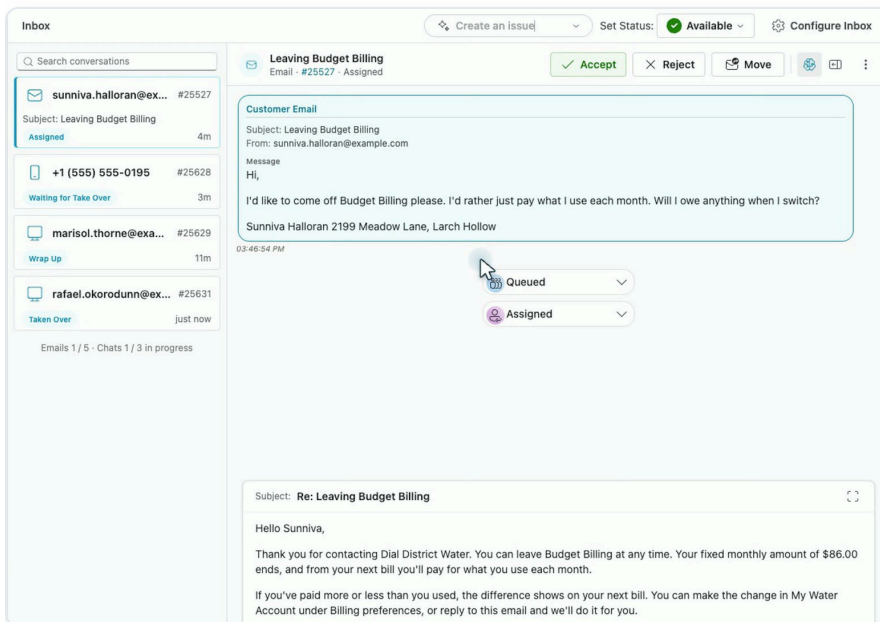
- 1 When a call is routed to you, an **Incoming call** dialog appears with the caller's details.
- 2 Select **Accept**. You join the call, and the call controls appear.
- 3 Use **Mute** and **Unmute**, and **Hold** and **Resume**, as you need.

- 4 To pass the call on, select **Transfer** and choose a contact, as in Live View.
- 5 When the call is over, select **Hangup**.

NOTE If **Accept** is grayed out with "Connect your softphone or add a phone number to accept calls", add a **Mobile phone number** in **Configure Inbox**, or ask your supervisor.

Answer an email

- 1 Select the email in the queue. The AI agent's draft reply is ready under the customer's email, with the **Subject:** line.
- 2 Select **Accept**.
- 3 Read and edit the draft. Use the toolbar for bold, lists and headings.
- 4 Select **Send**. The reply goes to the customer.



An email in the Inbox with Accept, Reject and Move at the top and the AI agent's draft reply below.

TIP If you need to reply again after wrapping up, select **Reopen**.

Move an email to a mailbox folder

Move puts the email thread in a mailbox folder for a person to work. It appears only on email addresses set up with mailbox folders.

IMPORTANT After **Move**, the AI agent won't answer that thread again. Use it only when the thread belongs with a person from now on. If you're not sure, ask your supervisor.

- 1 Select **Move**. A dialog with your mailbox folders opens.
- 2 Choose the folder and select **Move**. The email moves to that folder.

To give an email back to the AI agent instead, open the Actions menu (:) and select **Return to AI**.

Take over a waiting conversation

Some conversations wait in the queue for anyone to pick up. Their card says **Waiting for Take Over**.

- 1 In the queue, select the waiting conversation.
- 2 Select **Take Over**. It's assigned to you straight away, and you can reply.

Wrap up a conversation

Wrap-up is the time after a conversation to finish your notes and tags. The next conversation won't reach you until you wrap up.

- 1 End the conversation: select **Hangup** on a call, or **End** on a chat.
- 2 Finish your work, such as adding tags, or a note from the Actions menu (:).
- 3 Select **Wrap Up**. The conversation leaves your queue, and you can receive the next one.

TIP If the AI agent can carry on instead of you, open the Actions menu (:) and select **Return to AI**.

Use the customer panel

The right side of the Inbox shows what you need to know about the customer.

- 1 Select **Customer** to see their account details and their journey with you.
- 2 Select **Details** for the AI agent's summary and the conversation details.
- 3 Select **Sentiment** to see how the customer has been feeling.
- 4 To make more room, select **Hide customer context**. To see the AI agent's behind-the-scenes steps in the conversation, select **Show AI activity**.

05 Outages

When you post an outage, the AI agent tells callers about it. The **Reported** tab shows the problems customers have told you about.

- 01 Review caller-reported outages

02 Post an outage
- 03 Update an outage

04 Resolve, invalidate or reopen an outage

Review caller-reported outages

1. Select **Monitor > Outages**, then select the **Reported** tab. Each report shows **Description**, **Address**, **Source** and **Reported**.

2. Read **Source**. **Transcript #** with a number means the AI agent logged the report during that conversation. Select it to open the conversation. **Taken by user** means a staff member entered it.
- 3 Look for several reports on the same street. That is often the first sign of an outage worth posting.

4 If you see a cluster, post an outage (Supervisor) or tell your supervisor (CSR).

Report Outage

Description	Address	Source	Reported	
Brown, discolored water from the kitchen tap (CR-2210).	1668 Chestnut STREET Wrenford 00110 United States of America	Transcript #25537	Oct 8, 2026, 12:32 PM	
Water running down Gull Point Road; caller asked if it is a new break.	599 Bayberry LANE Osterly Bay 00120 United States of America	Transcript #25552	Oct 8, 2026, 12:32 PM	
Pressure still low this afternoon (follow-up text).	1962 Lighthouse ROAD Osterly Bay 00120 United States of America	Transcript #25540	Oct 8, 2026, 12:32 PM	
Very low water pressure; elderly caller asked about water delivery.	1962 Lighthouse ROAD Osterly Bay 00120 United States of America	Transcript #25526	Oct 8, 2026, 12:32 PM	
No water at all since early morning; baby at home.	1597 Lakeview DRIVE Osterly Bay 00120 United States of America	Transcript #25511	Oct 8, 2026, 12:32 PM	
No water at the house since this morning, near the Lakeview Drive main break.	871 Lakeview DRIVE Osterly Bay 00120 United States of America	Transcript #25577	Oct 8, 2026, 12:32 PM	

The Reported tab with several no-water and low-pressure reports from Osterly Bay, each linked to the conversation where the AI agent logged it.

NOTE CSRs can see both tabs, so they can tell customers the same thing the AI agent does.

Post an outage

The AI agent shares a posted outage with callers who ask. A clear post means fewer transfers during a busy event.

What to put in the description. The AI agent shares it with callers, so write it the way you want it said:

- What's affected, such as no water, low pressure or a boil-water notice
- Where, by street names and the area covered
- What customers should do, such as where to get bottled water
- Plain words, with no internal codes or shorthand

- 1 Select **Monitor > Outages**. The **Outages** tab lists posted outages with their **Status**, **Description** and **Expected resolution**.
- 2 Select **Post outage**. The **Post outage** dialog opens, with **Posting tips** on the left.
- 3 In **Description**, say what's affected, where, and what customers should do. For example: "Water main break at Lakeview Drive and Gull Point Road, Osterly Bay. Crews on site. Boil-water notice for Osterly Bay north of Harbor Street. Bottled water at Osterly Bay Community Center, Pier Avenue, 8:00 a.m. to 8:00 p.m."
- 4 Under **Expected resolution**, choose the date and enter the time you expect service back, for example tomorrow at 6:00 p.m.
- 5 If you don't know yet, select **Unknown** instead, and update it later. The date and time fields are grayed out.
- 6 Read the description once more, the way a caller would hear it.
- 7 Select **Post outage**. The dialog closes, and the outage appears at the top of the list as **Ongoing**. The AI agent can tell callers about it straight away.

The Post outage dialog filled in for the Lakeview Drive main break, with posting tips on the left.

TIP Be specific. "Water main break at Lakeview Drive and Gull Point Road" helps callers more than "outage in Osterly Bay".

TIP Post as soon as crews confirm the problem. An estimated time helps callers plan, even if it changes.

Update an outage

Keep the outage current, so the AI agent tells callers the latest news.

- 1 On the **Outages** tab, select the pencil (**Edit outage**) on the outage's row. The **Edit outage** dialog opens.
- 2 Change the **Description**. For example, add "Water restored. Boil-water notice remains until two clean samples 24 hours apart."
- 3 Optional: change the **Expected resolution** date and time whenever crews give you a new one, or select **Unknown**.
- 4 Select **Save**. The dialog closes, and the row shows your changes.

NOTE A boil-water notice often lasts longer than the repair. When the main is fixed but the notice is still on, say so in the description and leave the outage open.

Resolve, invalidate or reopen an outage

IMPORTANT Once you mark an outage resolved, the AI agent stops telling callers about it. Don't resolve too early. Check that nothing is left to tell them, such as a boil-water notice.

- 1 When there's nothing left to tell callers, select **More actions** (:) on the outage's row. A menu opens.
- 2 Choose **Mark as resolved**. The status changes to **Resolved**.
- 3 If you posted an outage by mistake, open **More actions** and choose **Mark as invalid**. The status changes to **Invalid**.
- 4 If a problem comes back after you resolved it, open **More actions** on that outage and choose **Reopen as ongoing**. The status changes to **Ongoing**.
- 5 After reopening, edit the description so callers hear what's happening now.

NOTE You can't delete a posted outage. Mark a mistake as **Invalid**.

Quick reference

Supervisor

TO...	DO THIS
See how today is going	Monitor > Dashboard > Daily Dashboard; read Inbound and the "vs last" lines
See one flow's trends	Success Metrics > set Start , End and Flow > read What changed
Schedule a weekly report	Scheduled Report > Schedule Report > fill in > Weekly , Days , Report Window > Create
Test, pause or resume a report	On its card: Send Now , Pause or Resume
Export conversations	Conversations > filter or pick a View : > Export > Download
Set the team's default view	View : > : beside the view > Set as default
Get a conversation explained	Open the conversation > Ask AI > Explain this call
Correct a wrong flag	Tags & Review > Review actions > This flag was wrong > explain > Record correction

Coach the AI agent on a live conversation	Live View > select the card > Add Coaching > type > Confirm
Send to a specific person	Live View > Enqueue > Specific agent > Select agent > Enqueue
Transfer a live call	Live View > Transfer > choose a contact > Confirm
Post or resolve an outage	Outages > Post outage > fill in > Post outage ; later, row : > Mark as resolved

CSR

TO...	DO THIS
Start or pause taking conversations	Monitor > Inbox > Set Status: > Available (or Busy for a break)
Change skills or limits	Inbox > Configure Inbox > change > Save
Pick up an assigned conversation	Select it in the queue > Accept (or Reject to return it)
Pick up a waiting conversation	Select it in the queue > Take Over
Reply to a chat or text	Edit the suggested reply > Send
Approve the AI agent's action	Approve , or Give instructions > type > Send instructions
Answer an email	Select it > Accept > edit the AI agent's draft > Send
Finish a conversation	Hangup or End > notes and tags > Wrap Up
Find a conversation	Monitor > Conversations > column funnels (Flow , Date , Status)
Tag a conversation	Details > Tags & Review > Add > choose key, enter value > Save
Listen in on a live call	Live View > select the card > : > Listen In
See outages and customer reports	Monitor > Outages > Outages tab, or the Reported tab

Customer Admin and Tester

TO...	DO THIS
See how today is going (Customer Admin)	Monitor > Dashboard > Daily Dashboard
Open a conversation	Monitor > Conversations > filter > select the row
See the path the AI agent took	Open the conversation > Flows tab
Tag a conversation (Tester)	Details > Tags & Review > Add > choose key, enter value > Save
Clear a flag that's been dealt with (Tester)	Tags & Review > Review actions > Remove flag

Troubleshooting

PROBLEM	WHAT TO DO
A tab or button in this handbook is missing.	Your role doesn't include it. Ask your administrator.
The Daily Dashboard numbers look higher than your flow's traffic.	The Daily Dashboard counts every flow in your organization. Use Success Metrics and choose your flow under Flow .
Conversation Reasons shows no reasons for your flow.	Reasons haven't been set up for that flow yet. Ask your Dial AI team.
Custom Reporting says "No dashboards found".	No dashboard has been set up for you yet. Ask your Dial AI team.
A scheduled report didn't arrive.	Check the card shows Active and the right recipients. Select Send Now to test, and check your spam folder.
Export is missing.	Exporting needs the Supervisor role.
A tag key you need isn't in the list.	Ask your Dial AI team to add it for your flow.
The Flows tab says "No Flow".	The conversation didn't run a flow, so there's no path to show.
Listen In is grayed out.	It works on live phone calls only, and not while a call waits in the queue or is in wrap-up.
Transfer is grayed out.	Transfer works on live phone calls only. For a chat, text or email, use Enqueue or Self Assign .

Self Assign is grayed out.	It works on live chats, texts and emails only. For a call, use Transfer or Enqueue .
A contact is missing from the transfer list.	Ask your customer admin to add it to the Contact Book.
Your Inbox stays empty.	Check your status is Available , your skills are set in Configure Inbox , and the platform is open in your browser.
Accept is grayed out on a call.	Add a Mobile phone number in Configure Inbox , or ask your supervisor.
Move doesn't appear on an email.	Your email address isn't set up with mailbox folders. Use Return to AI , or answer it yourself.
You posted an outage by mistake.	Select More actions on its row and choose Mark as invalid . You can't delete an outage.

Glossary

TERM	MEANING
Agent, AI agent	The virtual agent that answers your customers. On a few screens, "agent" means a person on your team: Specific agent , Select agent and Agent Workload .
AI deflected	The share of conversations the AI agent finished with no person involved.
AI handled	The share of conversations the AI agent completed, plus transfers where it did everything the flow asks before handing off.
Coaching	A private instruction you send the AI agent during a live conversation.
Contact Book	Your organization's list of transfer contacts, such as Field Services Dispatch.
Conversation	One call, chat, text or email.
Conversation reason	Why the customer got in touch, such as a billing question.
CSR	Customer service representative: a person on your team who answers conversations.
Customer journey	All the conversations with one customer, in order.
Do-Not-Interact (DNI) list	Callers who go straight to a person without the AI agent.
Flag	A mark from the AI reviewer that a conversation needs a person to look at it.

Flow	The steps the AI agent follows in a conversation.
Outage	A service interruption you post so the AI agent can tell callers about it.
Queue	Where conversations wait for a person to pick them up.
Saved view	A named set of Conversations filters, shared with your organization.
Self Assign	Taking a chat, text or email from the AI agent to answer it yourself.
Skill	What a conversation needs from the person who answers it, such as Billing or Spanish. Conversations are routed to people with the right skills.
Tag	A label on a conversation, made of a key and a value.
Wrap-up	The time after a conversation to finish notes and tags, before the next one reaches you.



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