DialOAI

PLATFORM HANDBOOK

Outbound

Reach customers first by phone or email, on the days and hours you choose, and keep the numbers you must not call off every list.

Supervisor | Customer Admin

OUTBOUND HANDBOOK

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Overview

The **Outbound** tab lets your team reach customers before they call you. A campaign takes a list of contacts, and the AI agent calls or emails each one during the times you set. Every conversation is saved, so you can see whom the AI agent reached and read what each customer said.

This handbook is for:

- **Supervisors**, who create campaigns, load contacts, set calling hours and read the results
- **Customer Admins**, who manage the Do-Not-Call list (Supervisors can manage it too)

Sign in with your own account. What you see depends on your role, so if a page in this handbook is missing for you, ask your Customer Admin.

The examples follow Dial District Water. Its meters have spotted homes using far more water than usual, so the supervisor runs a voice campaign called **High usage — possible leak alert**. The AI agent calls each customer, explains what the meter shows and helps them check for a leak.

What your Dial AI team sets up first

Before your first campaign, your Dial AI team sets these up with you:

- **The flow.** A flow is the conversation the AI agent follows. Your Dial AI team builds a flow for each kind of campaign, and you pick it when you create the campaign.
- **The phone number the AI agent calls from.** Customers see it as the caller ID.
- **The voice the AI agent speaks with.**
- **For email campaigns, the email address the AI agent sends from.**

To get a new kind of campaign, a new number or a new sending address, ask your Dial AI team.

Your contact list

Keep your contact list as a CSV file. You can save one from Excel or your billing system: choose **File > Save As**, then **CSV (Comma delimited)**.

Write phone numbers in E.164 format: a plus sign, the country code, then the number, with no spaces, dashes or brackets. For example, (555) 555-0145 becomes `+15555550145`.

01 Campaigns

Create a voice campaign, add the people to call and choose when the AI agent calls them.

01 Find a campaign and check its status
02 Create a voice campaign
03 Add your contacts
04 Set the calling hours and start the campaign
05 Pause a campaign

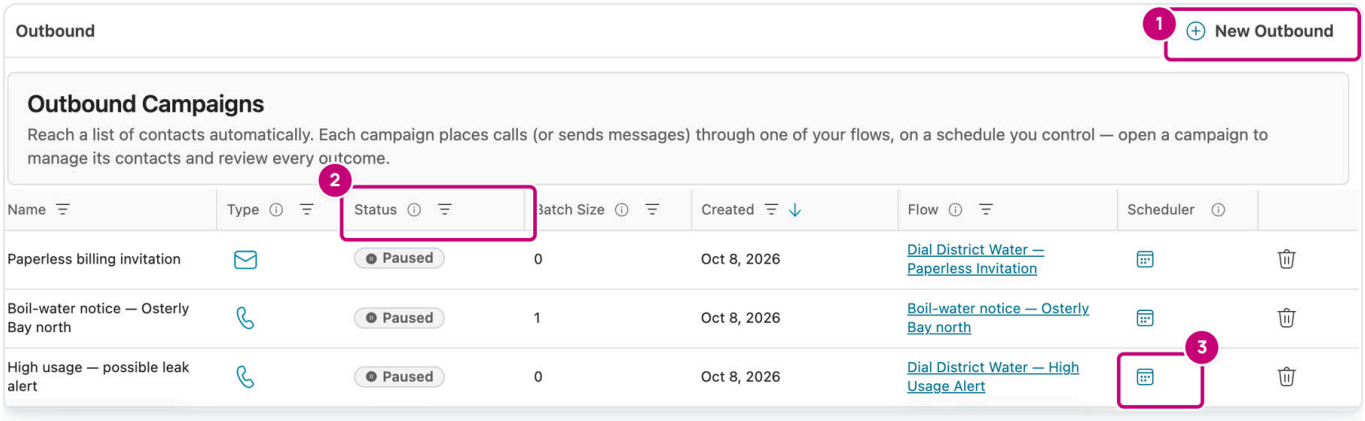
Find a campaign and check its status

The campaign list shows every campaign at a glance, so start here each day.

1. In the left sidebar, under **Outbound**, select **Campaigns**. The **Outbound Campaigns** page opens, with the newest campaigns first.
2. Look at the **Status** column. **Active** campaigns call only during their time blocks. **Paused** campaigns don't call at all.

3. Optional: to narrow the list, select the filter icon in a column heading. You can search by **Name**, or filter by **Type** (Phone, SMS or Email), **Status**, **Created** date or **Flow**.

4. To open a campaign, double-click its row. A single click doesn't open it. The campaign opens on its **Schedule** tab.



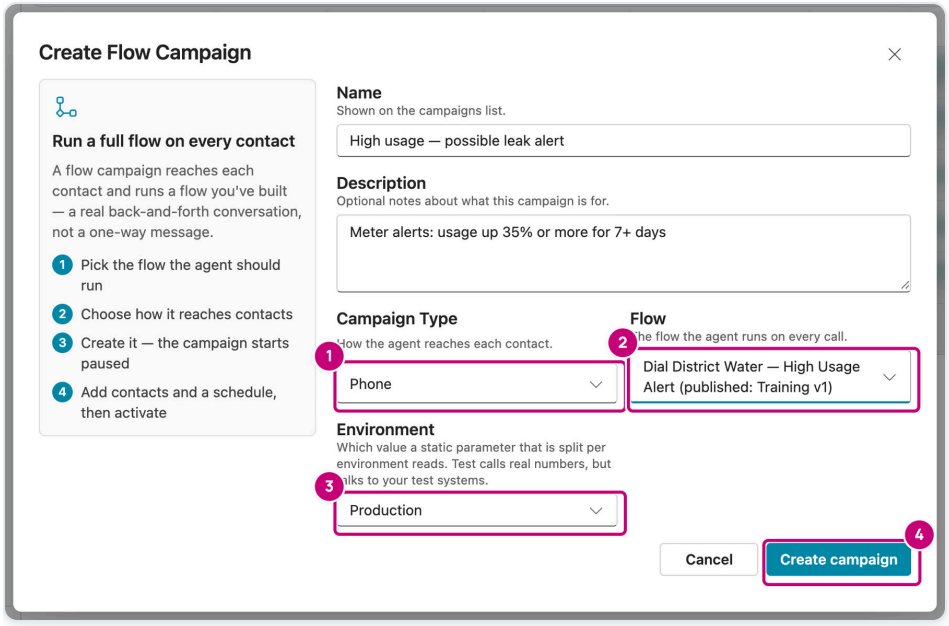
The Outbound Campaigns page: 1 New Outbound creates a campaign, 2 the Status column shows Active or Paused, 3 the calendar icon opens a campaign's schedule.

TIP Select the calendar icon in the **Scheduler** column to go straight to a campaign's calling times.

Create a voice campaign

In a flow campaign, the AI agent holds a real, two-way conversation with each customer. Every new campaign starts paused, so nothing goes out until you're ready.

1. On the **Outbound Campaigns** page, select **New Outbound**. A menu opens.
2. Select **Flow Campaign**. The **Create Flow Campaign** dialog opens.
3. In **Name**, enter a clear name your team will recognize, such as `High usage — possible leak alert`. It appears on the campaign list.
4. Optional: in **Description**, say who is on the list and why. For example, `Meter alerts: usage up 35% or more for 7+ days`.
5. In **Campaign Type**, choose **Phone**.
6. In **Flow**, choose the flow your Dial AI team built for this campaign. Each flow is listed once as a draft and once for each published version, such as **Dial District Water — High Usage Alert (published: Training v1)**.
7. Leave **Environment** set to **Production**.
8. Select **Create campaign**. The campaign opens on its **Contacts** tab, with a **Paused** badge next to its name.



The Create Flow Campaign dialog filled in for the leak alert: 1 Campaign Type, 2 Flow, 3 Environment, 4 Create campaign.

> **TIP** For a live campaign, choose a published version of the flow. A published version doesn't change while your Dial AI team works on the draft.

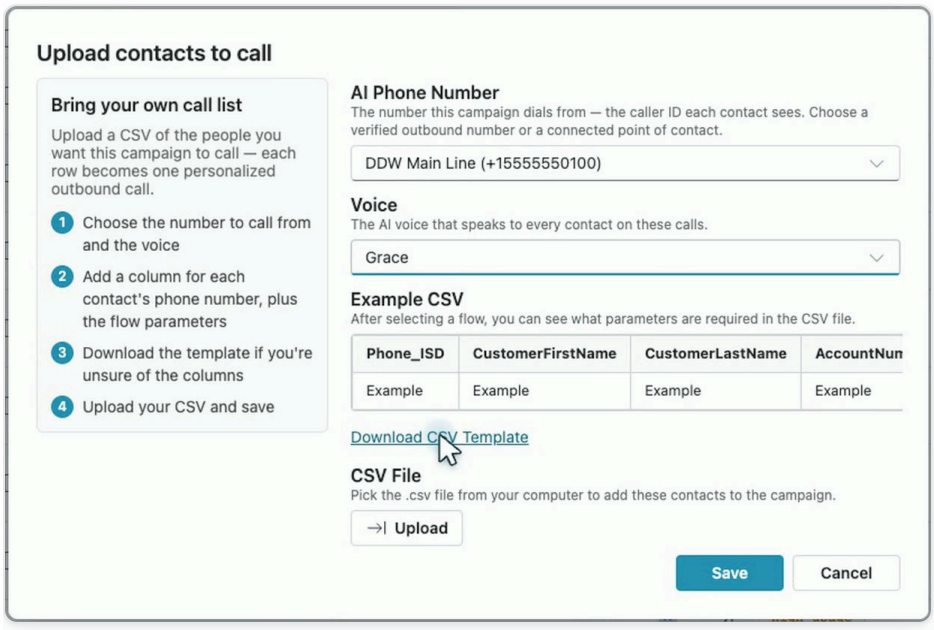
Add your contacts

Each row in your CSV file becomes one call. Extra columns, such as the customer's first name or account number, let the AI agent personalize each call.

1. Open the campaign and select the **Contacts** tab.
2. Select **Add**. If the campaign has no contacts yet, you can also select **Upload contacts** in the middle of the page. The **Upload contacts to call** dialog opens.
3. In **AI Phone Number**, choose the number customers see as the caller ID, such as **DDW Main Line (+15555550100)**.
4. In **Voice**, choose the voice the AI agent speaks with.
5. Under **Example CSV**, check the column headings. Your file needs every heading shown, spelled exactly the same. **Phone_ISD** holds each phone number, in E.164 format.
6. Optional: select **Download CSV Template** to get an empty file with the right headings.
7. Under **CSV File**, select **Upload**. The **File Upload** dialog opens.
8. Drag your file into the box, or choose it from your computer, then select **Upload**. The file name appears under **CSV File**.

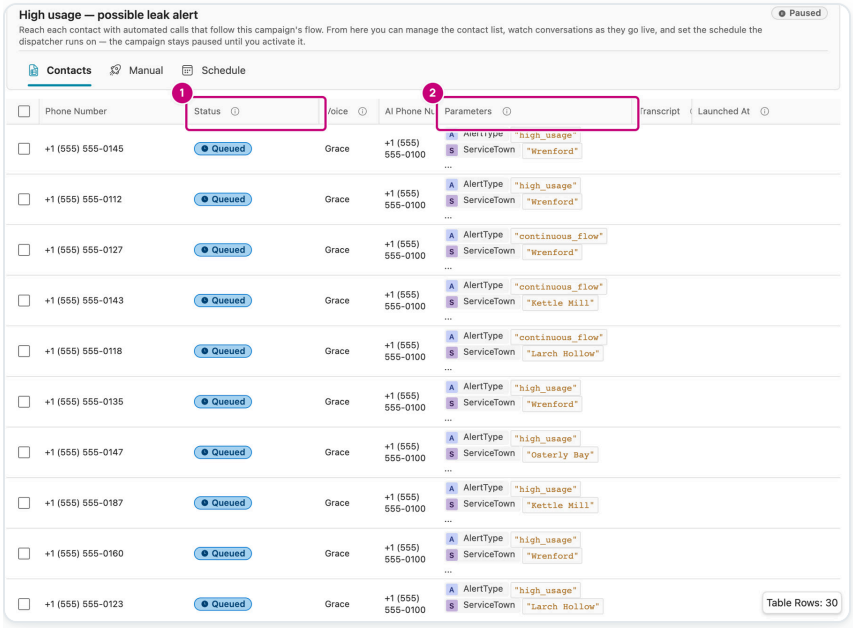
> **IMPORTANT** If a heading is missing or misspelled, or a number is already in the campaign, the whole upload fails. The message **Error uploading CSV to campaign** appears and no contacts are added. Download the template, copy your data into it and try again.

9. Select **Save**. A **CSV Uploaded** message appears, and each contact shows the status **Queued**, which means it is waiting for the schedule.



The Upload contacts to call dialog with the caller ID and voice chosen. The Example CSV shows the headings your file needs.

10 Check the **Parameters** column. It shows values from each row of your file, so you can confirm the file was read correctly.



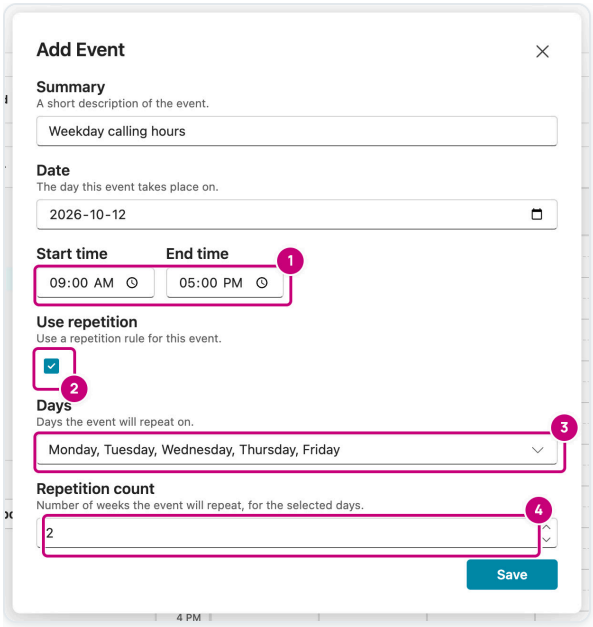
The Contacts tab after an upload: 1 every contact is Queued, 2 the Parameters column shows values from your file.

Set the calling hours and start the campaign

Time blocks set the days and hours the campaign may call. The **Schedule** switch turns calling on and off. Nothing changes until you select **Save** in the yellow **Unsaved changes** bar.

> **IMPORTANT** Add time blocks before you turn on the **Schedule** switch. A campaign with no time blocks can call at any hour.

1. Open the campaign and select the **Schedule** tab. A weekly calendar opens, with the **Schedule** switch above it.
2. Select **New time block**. The **Add Event** dialog opens.
3. In **Summary**, enter a short name, such as `Weekday calling hours`.
4. In **Date**, enter the first day you want calls.
5. In **Start time** and **End time**, set the hours, such as 9:00 a.m. to 5:00 p.m.
6. To repeat the block, select **Use repetition**. The **Days** and **Repetition count** fields turn on.
7. In **Days**, choose the days, such as **Monday** to **Friday**.
8. In **Repetition count**, enter the number of weeks to repeat, such as `2`.

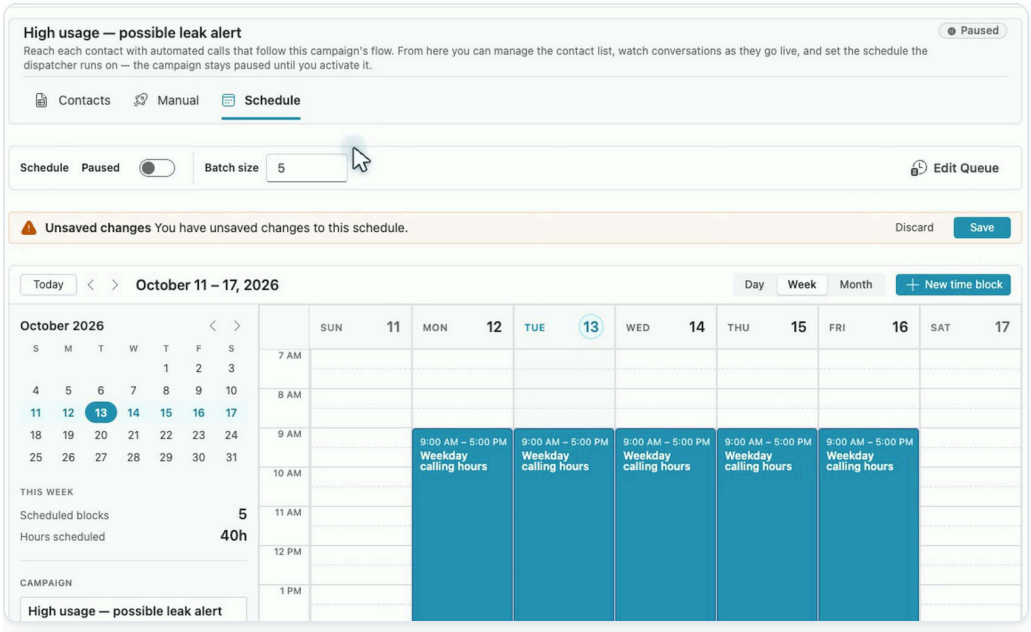


The Add Event dialog set for weekday calling from 9:00 a.m. to 5:00 p.m.: 1 Start time and End time, 2 Use repetition, 3 Days, 4 Repetition count.

9. Select **Save** in the dialog. The blocks appear on the calendar, and the yellow **Unsaved changes** bar appears above it.

> **IMPORTANT** The **Save** in the **Add Event** dialog only adds blocks to the calendar. The campaign starts only when you select **Save** in the yellow bar.

10. When your blocks are in place, turn on the **Schedule** switch. The badge changes from **Paused** to **Active**.
11. In the **Unsaved changes** bar, select **Save**. The bar disappears, and the campaign is **Active**.



Weekday time blocks on the Schedule tab, not yet saved. Turn on the Schedule switch, then select Save in the yellow bar.

The AI agent starts calling **Queued** contacts at the next time block and works through the list. **Batch size**, next to the switch, is the most calls the campaign places at the same time.

> NOTE Time blocks use your computer's time zone. If your team works across time zones, check yours before you add blocks.

Change or remove a time block

- **To move a block,** drag it to a new time in **Week** or **Day** view.
- **To change a block,** select it. The **Edit Event** dialog opens. Change the fields and select **Save**.
- **To remove a block,** select it, then select **Delete**. In the **Delete time block** dialog, select **Delete this** for one block, or **Delete all** for every block with the same summary.

After any change, select **Save** in the **Unsaved changes** bar. To throw your changes away instead, select **Discard**.

A time block must be shorter than 24 hours. The **Month** view is for looking only; make changes in **Week** or **Day** view.

Pause a campaign

Pause a campaign when calls must stop, for example during a main break.

1. Open the campaign and select the **Schedule** tab.
2. Turn off the **Schedule** switch. The badge changes to **Paused**.
3. In the **Unsaved changes** bar, select **Save**. No new calls start. Calls already in progress finish normally.

Pausing keeps your contacts and their statuses. To continue, turn the switch back on and select **Save**.

> TIP To hold back only some contacts, select **Edit Queue** on the **Schedule** tab. Held contacts show **Suspended** and aren't called until someone releases them.

02 Results

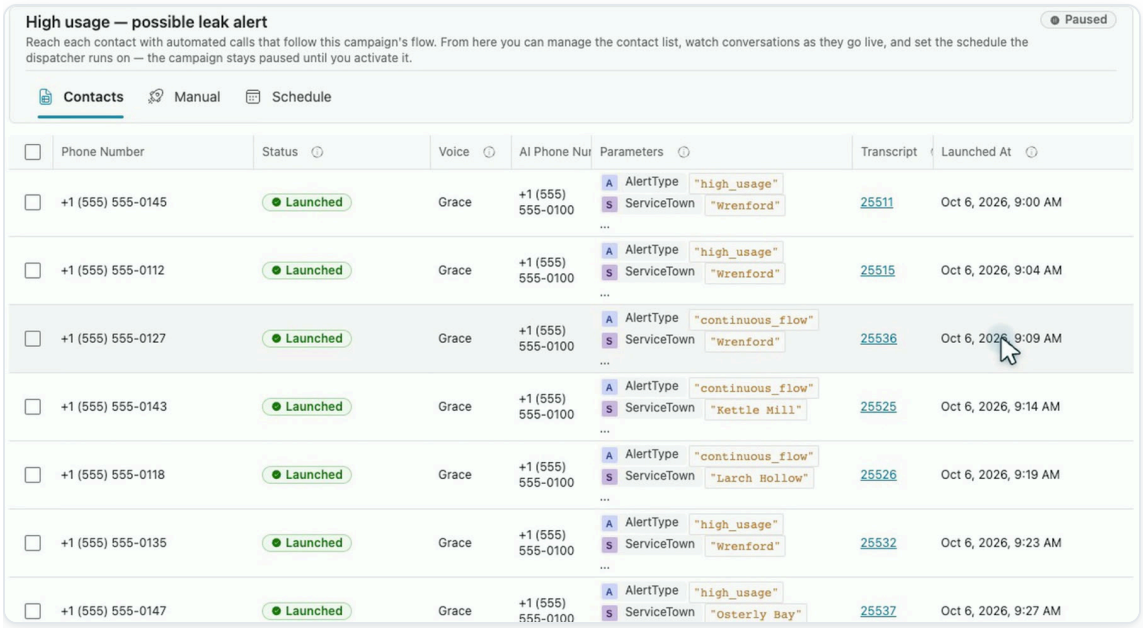
See where every contact stands and read each conversation.

01 Check each contact's status
02 Read a conversation
03 Fix or remove a contact
04 Call contacts right away

Check each contact's status

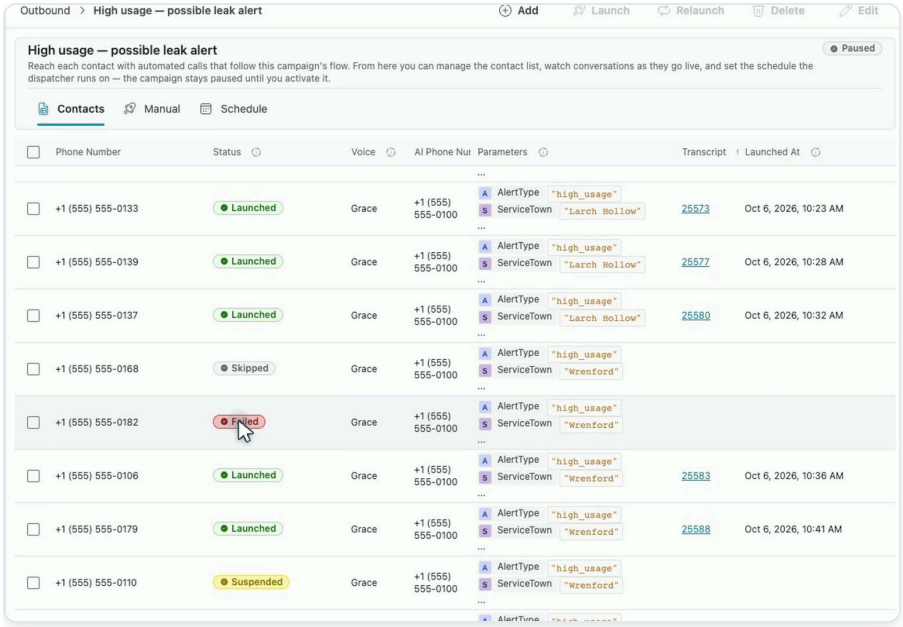
The **Contacts** tab shows where every contact is in the campaign.

1. Open the campaign and select the **Contacts** tab.
2. Read the **Status** of each contact. The table below explains each one.
3. Read across the row. **Parameters** shows values from your file, so you know who each contact is. **Launched At** shows when the AI agent placed the call. It stays empty until then.



The Contacts tab of a campaign that has run. Each Launched contact has a Transcript number and the time the AI agent placed the call.

4 To see why a contact shows **Skipped** or **Failed**, point to its status. A tooltip shows the reason, such as **Skipped - Target is on the do-not-call list**.



Further down the list: Skipped, Failed and Suspended contacts. Point to a status to read the reason.

STATUS	WHAT IT MEANS	WHAT TO DO
Queued	Waiting for the next time block.	Nothing. The AI agent calls it in turn.
Pending	The AI agent is placing the call now.	Nothing. It changes to **Launched** in a moment.
Launched	The AI agent placed the call. For an email campaign, the AI agent sent the email.	Open the transcript to see how it went.
Suspended	Someone held it back with **Edit Queue**.	Nothing. The AI agent calls it only after someone releases it.
Skipped	The AI agent left it out on purpose, for example because the number is on the Do-Not-Call list.	Point to the status to read the reason.
Failed	The call couldn't be placed.	Point to the status to read the reason, then fix the contact.
Unknown	The status couldn't be read.	Refresh the page. If it stays, contact Dial AI support.

Read a conversation

Each call or email the AI agent makes becomes a conversation you can open from the campaign.

1. Open the campaign and select the **Contacts** tab.
2. In the **Transcript** column, select the contact's number. The number appears once the call has finished.

3. The conversation opens in **Monitor > Conversations**, with the transcript and the flow the AI agent followed. For a call, you can also play the recording.
4. When you're done, use your browser's back button to return to the campaign and open the next contact.

TIP Read the most urgent conversations first. In the leak alert, customers whose **AlertType** is `continuous_flow` are the likeliest leaks.

Fix or remove a contact

1. On the **Contacts** tab, select the check box for one contact.
2. Select **Edit**. The **Edit Call** dialog opens.
3. Change **Target Phone Number**, **Source Phone Number**, **Voice** or any value under **Parameters**.
4. Select **Save**. The row updates.

IMPORTANT **Delete** removes the selected contacts at once, with no confirmation. Check your selection first.

To remove contacts, select their check boxes, then select **Delete**.

Call contacts right away

Most campaigns run on their schedule. These tools place calls now instead, even outside your time blocks.

IMPORTANT These tools call customers immediately, at any hour. Check the time before you use them.

- **Launch:** on the **Contacts** tab, select one or more contacts, then select **Launch**. In the **Launch Campaign** dialog, select **Launch**.
- **Relaunch:** to call contacts that were already **Launched** again, select them, then select **Relaunch** and confirm in the **Relaunch Campaign** dialog.
- **Manual tab:** lists **Unlaunched** and **Currently launched** contacts side by side. Select the rocket icon next to a queued contact to call it at once, with no confirmation. The **Manual** tab works for phone and SMS campaigns.

03 Do-Not-Call list

The Do-Not-Call list holds the phone numbers no campaign may call. Add a number when a customer asks you to stop calling.

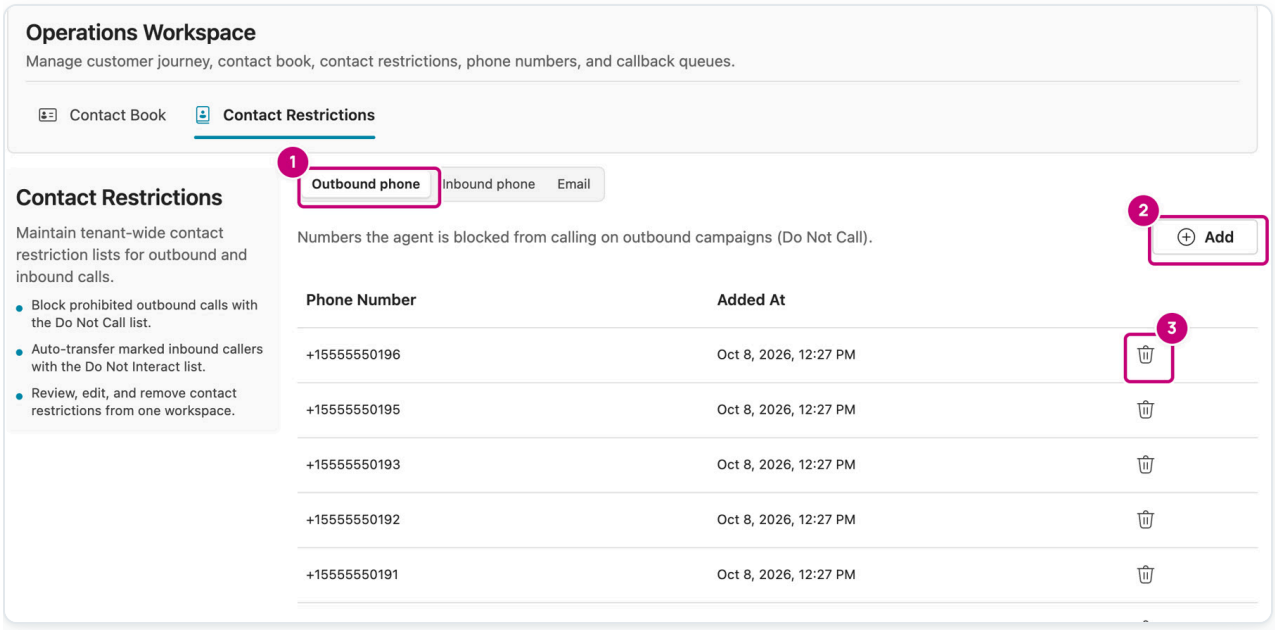
01 Add a number to the Do-Not-Call list

02 Remove a number from the Do-Not-Call list

Add a number to the Do-Not-Call list

The platform checks the list right before every call. A listed number is never dialed, and its contact shows **Skipped**. This protects the customer on every campaign, including ones you uploaded before you added the number.

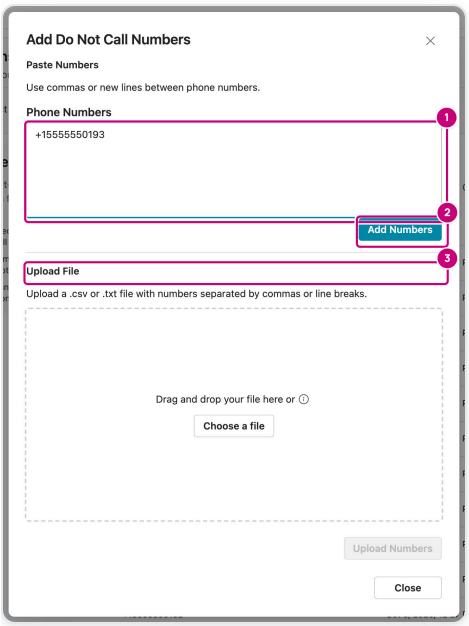
1. In the left sidebar, under **Settings**, select **Operations**. The **Operations Workspace** opens.
2. Select the **Contact Restrictions** tab.
3. Select **Outbound phone**. The Do-Not-Call list appears, with **Phone Number** and **Added At** columns.



The Do-Not-Call list: 1 Outbound phone, 2 Add, 3 the trash icon that removes a number.

4. Select **Add**. If the list is empty, select **Add Numbers** instead. The **Add Do Not Call Numbers** dialog opens.
5. Under **Paste Numbers**, enter one or more numbers in **Phone Numbers**, with a comma or a new line between them. For example, `+15555550190`.
6. Select **Add Numbers**. A message confirms how many numbers were added and how many duplicates were ignored.

7 Select **Close**. The new numbers appear in the list.



The Add Do Not Call Numbers dialog: 1 paste numbers here, 2 Add Numbers, 3 or upload a file.

To add many numbers at once, use **Upload File** in the same dialog. Choose a .csv or .txt file with the numbers separated by commas or line breaks, then select **Upload Numbers**.

NOTE The Do-Not-Call list covers phone calls only. It doesn't stop emails.

Remove a number from the Do-Not-Call list

Remove a number only when the customer agrees to be called again.

IMPORTANT The number is removed at once, with no confirmation. After that, any campaign can call that customer again.

1 Go to **Settings** › **Operations**, select the **Contact Restrictions** tab, then **Outbound phone**.

2 Select the trash icon on the number's row. The number leaves the list.

04 Other campaigns

Run an email campaign, or send a short spoken message to a list of numbers.

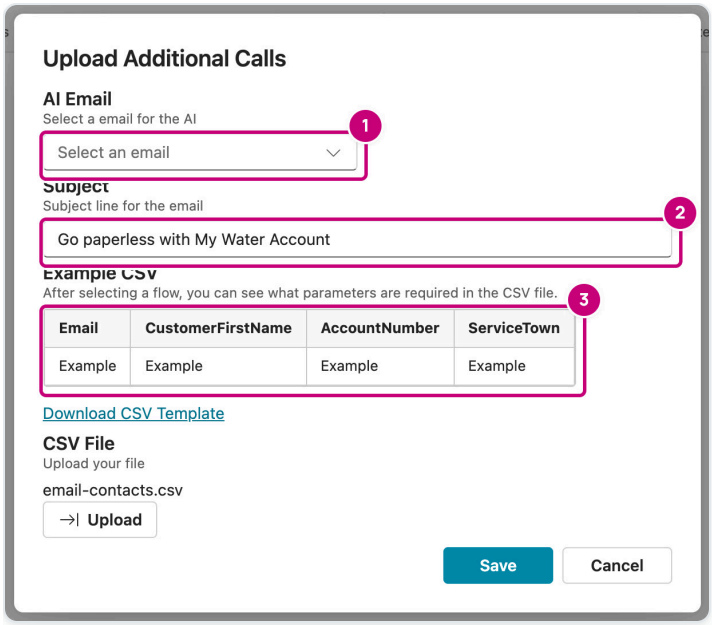
01 Run an email campaign

02 Send a spoken message to a list of numbers

Run an email campaign

In an email campaign, the AI agent sends a personalized email to each contact, following a flow. For example, Dial District Water invites customers who get paper bills to switch to paperless billing.

1. On the **Outbound Campaigns** page, select **New Outbound**, then **Flow Campaign**. The **Create Flow Campaign** dialog opens.
2. In **Name**, enter a clear name, such as `Paperless billing invitation`.
3. In **Campaign Type**, choose **Email**.
4. In **Flow**, choose your email flow. For email, the list shows only draft flows, such as **Dial District Water — Paperless Invitation (draft)**.
5. Leave **Environment** set to **Production**, then select **Create campaign**. The campaign opens on its **Contacts** tab.
6. Select **Add**. The **Upload Additional Calls** dialog opens.
7. In **AI Email**, choose the address customers will see the email come from.
8. In **Subject**, enter the subject line, such as `Go paperless with My Water Account`.
9. Check the **Example CSV** headings. Your file's address column is **Email**. Other columns, such as **CustomerFirstName**, personalize each message.
10. Under **CSV File**, select **Upload**, choose your file and select **Upload**.
11. Select **Save**. Each contact appears as **Queued**.
12. Add time blocks, turn on the **Schedule** switch and select **Save** in the **Unsaved changes** bar, the same as for a voice campaign.



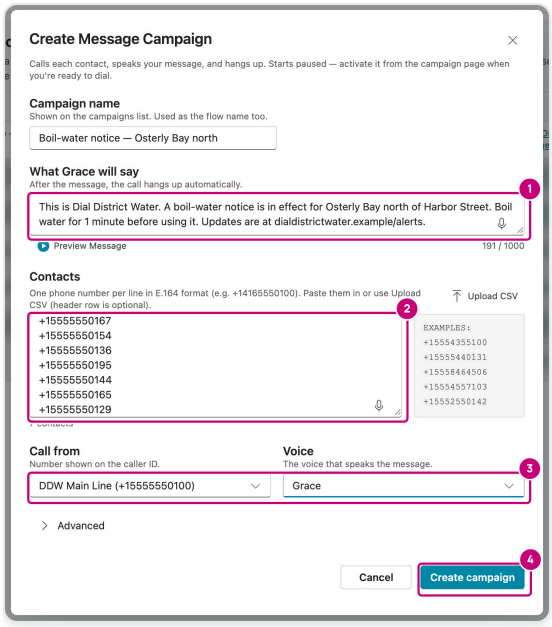
The Upload Additional Calls dialog for the paperless invitation: 1 AI Email, 2 Subject, 3 the Example CSV headings.

On an email campaign, **Launched** means the AI agent sent the email. Each email becomes a conversation you can open from the **Transcript** column.

Send a spoken message to a list of numbers

A message campaign calls each contact, speaks one message and hangs up. Use it for one-way notices, such as a boil-water notice. It doesn't need a flow.

1. On the **Outbound Campaigns** page, select **New Outbound**, then **Message Campaign**. The **Create Message Campaign** dialog opens.
2. In **Campaign name**, enter a clear name, such as `Boil-water notice — Osterly Bay north`.
3. In **What Grace will say**, enter your message, up to 1,000 characters. For example: `This is Dial District Water. A boil-water notice is in effect for Osterly Bay north of Harbor Street. Boil water for 1 minute before using it. Updates are at dialdistrictwater.example/alerts.`
4. In **Contacts**, paste the phone numbers, one per line, in E.164 format.
5. In **Call from**, choose the number customers see as the caller ID.
6. In **Voice**, choose the voice the AI agent speaks with.
7. Select **Create campaign**. The campaign opens, paused.
8. Add time blocks and start the campaign, the same as for a voice campaign.



The Create Message Campaign dialog for a boil-water notice: 1 What Grace will say, 2 Contacts, 3 Call from and Voice, 4 Create campaign.

Quick reference

Supervisor

To see every campaign and its status → **Outbound › Campaigns**, then read the **Status** column.

To open a campaign → double-click its row.

To create a voice campaign → **New Outbound › Flow Campaign**, **Campaign Type Phone**, choose the flow, **Create campaign**.

To create an email campaign → **New Outbound › Flow Campaign**, **Campaign Type Email**, choose the draft flow, **Create campaign**.

To send a spoken message to a list → **New Outbound › Message Campaign**, type the message, paste the numbers, **Create campaign**.

To add contacts → **Contacts** tab › **Add**, match the **Example CSV** headings, upload the file, **Save**.

To set calling hours → **Schedule** tab › **New time block**, set the days and hours, **Save**.

To start a campaign → **Schedule** tab, turn on the **Schedule** switch, **Save** in the **Unsaved changes** bar.

To pause a campaign → **Schedule** tab, turn off the **Schedule** switch, **Save** in the **Unsaved changes** bar.

To see why a contact wasn't called → **Contacts** tab, point to its **Skipped** or **Failed** status.

To read a conversation → **Contacts** tab, select the number in the **Transcript** column.

To add a Do-Not-Call number → **Settings** › **Operations** › **Contact Restrictions** › **Outbound phone** › **Add**.

Customer Admin

To add a Do-Not-Call number → **Settings** › **Operations** › **Contact Restrictions** › **Outbound phone** › **Add**, paste the numbers, **Add Numbers**.

To add many Do-Not-Call numbers → same dialog, **Upload File**, choose the file, **Upload Numbers**.

To remove a Do-Not-Call number → select the trash icon on its row. It's removed at once.

Good to remember

New campaigns start **Paused**. Nothing goes out until you turn on the **Schedule** switch and select **Save** in the yellow bar.

Add time blocks before you turn on the **Schedule** switch.

Write phone numbers as `+1` and 10 digits, with no spaces: `+15555550145`.

Troubleshooting

PROBLEM	WHAT TO DO
The campaign is Active, but the AI agent isn't calling anyone.	Check that the current time is inside a time block and that contacts show **Queued**. **Suspended** contacts aren't called.
My schedule changes disappeared.	Select **Save** in the **Unsaved changes** bar. The **Save** in the **Add Event** dialog doesn't save the schedule.
Calls happen at the wrong hour.	Time blocks use your computer's time zone. Check your time zone, then move the blocks.
Error uploading CSV to campaign appears.	A heading is missing or misspelled, or a number is already in the campaign. Select **Download CSV Template**, copy your data into it and upload again.
A phone number isn't accepted.	Use E.164 format: `+1` and the 10-digit number, with no spaces, dashes or brackets.
A contact shows Skipped.	Point to the status. If the number is on the Do-Not-Call list, the customer asked not to be called. Leave it.

I removed a number from the Do-Not-Call list, but the contact is still Skipped.	Skipped contacts aren't tried again on their own. Select the contact and use **Launch**, or upload it again.
A contact shows Failed.	Point to the status to read the reason. Fix the contact with **Edit**, or contact Dial AI support.
I can't find the flow I need in Flow.	For an email campaign, the list shows only draft flows. Otherwise, ask your Dial AI team to set up the flow.
I can't see Outbound in the sidebar.	Your role doesn't include campaigns. Ask your Customer Admin.

Glossary

TERM	MEANING
Campaign	A list of contacts that the AI agent reaches by phone or email, during the times you set.
Contact	One person on a campaign's list, with their phone number or email address and their parameters.
CSV file	A plain spreadsheet file, saved from Excel as "CSV (Comma delimited)".
Do-Not-Call list	Phone numbers that no campaign may call.
E.164 format	A phone number written as a plus sign, the country code and the number, with no spaces.
Flow	The conversation the AI agent follows on each call or email. Your Dial AI team builds it.
Flow campaign	A campaign where the AI agent holds a two-way conversation that follows a flow.

Message campaign	A campaign that speaks one message on each call and hangs up.
Parameters	Values from your file, such as a first name, that personalize each conversation.
Schedule switch	The switch on the **Schedule** tab that makes a campaign **Active** or **Paused**.
Time block	A window of days and hours when a campaign may call.

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