FLOGPT

Complete Manual

Every screen, field, and permission, documented in full.

AI Chat & Voice Agents platform with a built-in CRM
flogpt.com/docs

Contents

5. Call Centre

The human calling floor: dialer, lead queue, inbound handling, scripts, routing, and supervision.

6. Chat

Put an AI chat widget on your site and build the conversation workflows behind it.

7. Knowledge

Feed your agents your own content so answers come from your business, not guesswork.

8. Support

The human side: live chat inbox, tickets, contacts, call takeover, CRM analytics, and the Users section's team management.

9. Data

Capture structured data from conversations, take bookings, and read the visitor analytics behind both.

10. Integrations

Connect Shopify, your CRM, Google Sheets, Meta, LinkedIn, email, and SMS.

11. Setup

Profile, organization policies, security, API keys, billing, usage, and referrals.

COMPLETE MANUAL · SECTION 1

Start here

Create your workspace, invite your team, and get your first AI agent answering.

This is the reference version of first-run setup. It covers the concepts the rest of the manual assumes you already know: organizations, roles, the navigation model, and the order in which the pieces have to exist.

If you just want to get something working, read the Quick Start instead and come back here when something does not behave as you expected.

The model in one page

FloGPT has four layers, and things break mostly when people build them out of order.

1. **Organization** — the tenant. Every widget, contact, call, and setting belongs to exactly one organization. Nothing is shared between organizations, ever. A user account can belong to several, and switches between them in the workspace switcher.
2. **Knowledge** — the content the AI is allowed to answer from. Knowledge bases are org-scoped and can be attached to any number of chat widgets and call agents.
3. **Agents** — the things that talk to customers. A **chat widget** on your website, a **call widget** on a phone number. Each optionally attached to a knowledge base and a workflow or call pipeline.
4. **People and records** — the CRM inbox, tickets, contacts, leads, and the human reps who work them.

The dependency runs downwards. An agent with no knowledge base falls back to its prompt. A call agent with no phone number cannot be activated at all.

Accounts, organizations, and the switcher

An **organization** is created either during signup or from **Setup → Organization** if you signed up without one. Until an organization exists, most sections are unreachable — this is deliberate rather than a bug, and the pages say so.

Multiple organizations are supported. The switcher at the top of the sidebar changes which one you are looking at, and everything on screen re-scopes to it. Your role can differ per organization: owner of one, agent in another.

Organization settings reference

Setup → Organization, saved with **Update Organization**.

Field	What it does
Organization ID	Read-only, click to copy. Quote it when contacting support.
Organization Name	Display name in the switcher and in outbound templates.
Domain	Your primary website, stored normalised. A live helper shows the normalised form as you type.
Organization Logo	JPEG, PNG, GIF, SVG, or WebP, up to 5 MB.
Timezone	Interpreted by every calling window, business-hours rule, scheduled report, and campaign.
Billing Currency	Set once; affects invoices and displayed pricing.
Allowed Domains	Org-level domain allowlist, comma separated.
Max Chat Sessions	Cap on concurrent chat sessions.
Retention Days	How long conversation data is kept.
Enable Analytics	Whether analytics collection runs for this workspace.
Transcript PII Redaction	Turn on **Enable PII Redaction** and choose **Entity types to scrub** to strip personal data from stored transcripts.

Timezone is the field to get right first. It is not cosmetic. A campaign calling window of 09:00–18:00 means 09:00–18:00 *in this timezone*, and changing it later re-interprets every existing schedule.

Roles and what they gate

Roles are per organization, not per user account.

Role	Sees	Notably cannot
Owner	Everything	—
Admin	Everything operational, including API keys and billing views	Change organization-level settings reserved to owners
Editor	Builds and configures agents, workflows, knowledge	See billing; open Floor, Routing, or Follow-ups
Supervisor	The support and calling floor, every rep's activity, org-wide CRM analytics	See what the workspace is billed
Agent	Their own conversations, calls, and leads	See other reps, configuration, analytics beyond their own

Two role behaviours are worth internalising because they explain most "why can't I see that" questions:

- **AI Calls**, **Chat**, **Knowledge**, **Data**, and **Integrations** are hidden entirely from agents and supervisors. Those roles are staffing a floor, not configuring a product.
- The **analytics pages under Dashboard** are hidden from agents, who get the landing page and nothing else in that section. They are further gated among the other roles: **Agent Analytics** and **Supervisor Analytics** need supervisor or owner.

Manage people from the **Users** section, which only owners and admins see: **Agents** and **Supervisors** are owner-only, **Admins** is open to owners and admins.

Navigation

The sidebar is a two-part rail: icons for the ten top-level groups, and a sub-panel listing the pages in the selected group.

Groups are **Dashboard**, **AI Calls**, **Call Centre**, **Chat**, **Knowledge**, **Support**, **Users**, **Data**, **Integrations**, **Setup**. Every group has a guide in these docs under the same name, with two exceptions: **Users**, whose pages are documented in the Support manual, and the analytics pages under **Dashboard**, which have their own Insights manual. Otherwise the labels in the docs are the labels in the product.

Dashboard holds both the landing page and every analytics page. There used to be a separate **Insights** group for the latter; folding it in put the summary and the detail behind it in one place.

Owners and admins can hide groups they do not use, which declutters the rail for everyone in the workspace. Hiding is cosmetic only — it never changes permissions, and a direct link to a hidden section still resolves. **Dashboard** and **Setup** cannot be hidden, because doing so would strand members with no route back to their profile or billing. One consequence of the move: the analytics pages now sit inside a group that cannot be hidden, so they can no longer be hidden either.

There is also a `/hq` surface for FloGPT platform staff. It is not part of your workspace and is not documented here.

The Dashboard

Dashboard → Overview is the post-login landing page. Owners and admins see:

- Four tiles over the last 30 days: **Total Sessions**, **Total Calls**, **Total Messages**, **Avg Satisfaction** (out of 5).
- **Chat Summary** over the last 7 days: **Sessions**, **Messages**, **Visitors**, **CSAT**.
- **Call Summary** over the last 7 days: **Calls**, **Completed**, **Failed**, **Avg Duration**.
- **Recent Calls** — latest activity from your call widgets.
- Quick-action cards for **Workflows**, **Knowledge Base**, and **Analytics**.

Agents and supervisors get a different, role-appropriate dashboard.

The guided walkthrough

New workspaces are offered **Start Your Walkthrough** — a six-step in-product tour. Its steps are **Welcome to floGPT!**, **Knowledge Base Setup**, **Workflow Configuration**, **Chat Widget Installation**, **Test Your Assistant**, and **You're All Set!**. Each has its own advance button, plus **Skip This Step**.

The walkthrough adapts step 3 to the business type you selected at signup, so an e-commerce workspace is offered an order-and-returns workflow rather than a generic one.

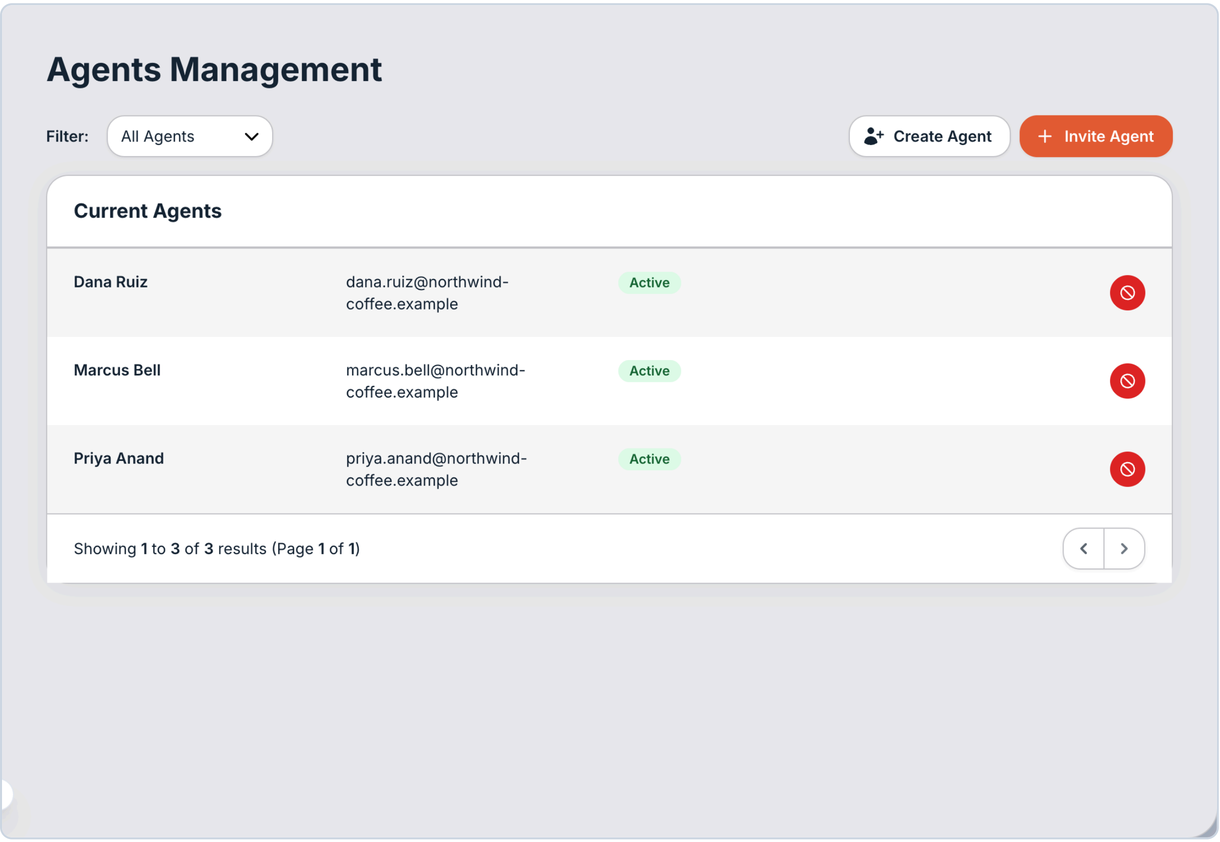
You can dismiss it with **Skip** and it will not block anything. Everything it does can be done from the sections directly.

Building it in the right order

The order that avoids rework:

1. **Organization** — name, domain, timezone.
2. **Knowledge** — create a knowledge base, crawl your site, upload documents. Verify it returns sensible answers before attaching it to anything.
3. **Chat** — one widget, attached to that knowledge base, installed on the site. Test it.
4. **Workflows** — only once you know what the AI gets wrong. Building a workflow before you have seen real conversations is guesswork.
5. **AI Calls** — the guided wizard, then a real test call and a read of the transcript.
6. **Integrations** — Shopify, your CRM, calendars. These make the agents more useful but none of them are prerequisites.
7. **People** — invite the team once there is something for them to work.
8. **Call Centre** — if you have human reps, set up **Numbers**, then **Routing**, then let reps into the **Dialer**.

Inviting your team



Managing agents. Owner-only, under Users → Agents.

Invite from the **Users** section: **Agents**, **Supervisors**, **Admins**. Bear in mind that a support agent or supervisor sees a much narrower product than you do — if you are writing internal instructions for them, check them against the role table above rather than against your own screen.

For a fully staffed human support team provided by FloGPT rather than hired by you, see **Support → Managed Support**.

Where to go next

Each section has both tiers:

- AI Calls — voice agents, pipelines, numbers, campaigns
- Call Centre — the human calling floor
- Chat — widgets and workflows
- Dashboard and Insights — the landing page and the analytics under it
- Knowledge, Support, Data, Integrations, Setup
- FloGPT for Shopify — a separate, deeper integration guide

COMPLETE MANUAL · SECTION 2

Dashboard

Your post-login landing page: what the tiles mean and how the view changes by role.

Dashboard sidebar: Dashboard

Complete reference for the **Dashboard** — the page you land on after signing in, at `/dashboard`.

Nothing is configured here. It is a read-only summary of chat and call activity, and the single most useful thing to understand about it is that **the numbers are deliberately different from the ones on the analytics pages** in the same sidebar section. This page explains each figure precisely enough that a discrepancy stops being alarming.

The **Dashboard** section is this page — reached from **Dashboard → Overview** — plus every analytics page under it. The analytics used to be a separate **Insights** section; they moved here so the summary and the detail behind it sit one click apart, and they are documented in the Insights guide.

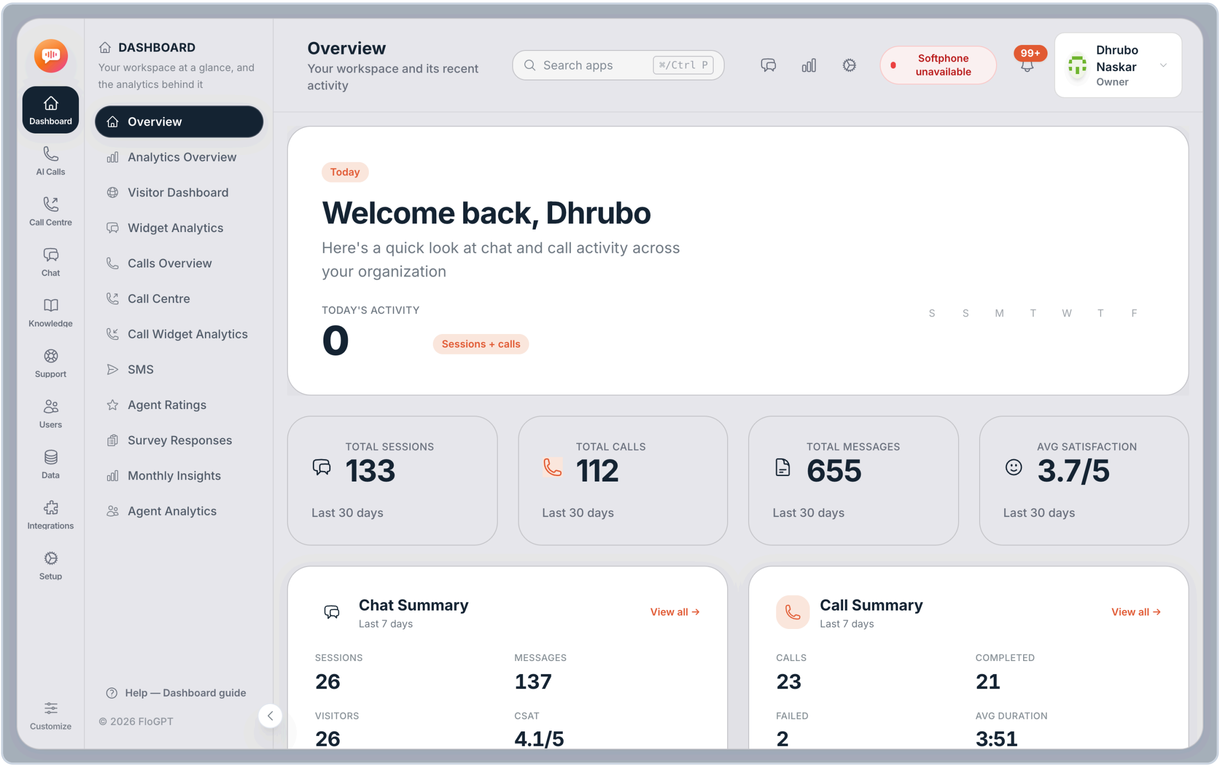
For the short version, use the Quick Start.

Which dashboard you get

The page branches on your organization role before rendering anything.

Role	What renders
Owner, **Admin**, **Editor**	The full workspace dashboard described below
Agent	A separate personal support dashboard
Supervisor	The same personal dashboard, styled differently

Owners, admins, and editors see an identical page — there is no further role-conditional content within it. Agents and supervisors never see the workspace tiles, the chat and call summaries, recent calls, or the quick actions.



The Dashboard as an owner or admin sees it.

The greeting and the activity chart

The header shows a **Today** pill, **Welcome back, {your first name}** — first name only, taken from your profile — and *Here's a quick look at chat and call activity across your organization*.

Beneath that, **Today's activity** is a single number with a **Sessions + calls** pill. It is exactly what it says: chat sessions plus calls, for one day. It is not a rolling total, and it is not the same as any tile below it.

The bar chart to the right plots the **last 7 days**, one bar per day, each bar being that day's sessions plus calls. The busiest day in the window is filled dark and labelled with its value. The chart is hidden on narrow screens, so on a laptop at a small window size you will see the number without the chart.

The four tiles

All four cover the **last 30 days** and say so underneath.

Tile	What it counts
Total Sessions	Chat conversations started in the window
Total Calls	Every call log in the window, inbound and outbound, AI and human
Total Messages	Messages inside chat conversations **plus** direct support messages
Avg Satisfaction	Out of 5 — see below

Avg Satisfaction has two sources and prefers the first: the average customer rating left on direct support messages, and, only if there are none, the average satisfaction rating recorded on chat conversations. The two are matched on different dates — a support rating counts on the day it was *given*, a conversation rating on the day the conversation *started*. It is rounded to one decimal place. A workspace with no ratings at all reads `0/5`, which means "nothing to average", not "everyone was unhappy".

Chat Summary

Covers the **last 7 days**. **View all** goes to `/analytics`, which is **Dashboard → Analytics Overview** — the entry directly below this page in the sidebar.

Metric	What it means
Sessions	Chat sessions across the seven days
Messages	Conversation messages plus direct messages
Visitors	See the warning below
CSAT	The most recent day that had a rating

Two of these are easy to misread.

Visitors is the sum of each day's unique visitor count, not the number of unique people across the week. Someone who chats on Monday, Wednesday and Friday counts three times. Treat it as "visitor-days", and use Analytics Overview if you need a true unique count.

CSAT is the *latest* day with a non-zero score, not an average of the week. One good rating yesterday will show a high number even after a poor week.

The area chart below the metrics plots daily sessions.

Call Summary

Also the **last 7 days**. **View all** goes to `/call`.

Metric	What it means
Calls	Every call in the window
Completed	Calls whose status is completed
Failed	Only calls whose status is literally *failed*
Avg Duration	Total talk time divided by **all** calls

Failed is narrower than most people expect. A call that went unanswered, hit a busy signal, or was cancelled is not counted here — only a call the telephony provider marked as failed. If you are chasing unanswered calls, the call logs in AI Calls are the right place, not this tile.

Avg Duration divides by every call, including the failed and zero-length ones, so a run of failures pulls the average down even though the connected calls were normal length.

Recent Calls

Latest activity from your call widgets. Five rows, newest first, and **no date window at all** — these are the five most recent calls in the workspace however old they are. A call shown here may well fall outside the seven days the Call Summary above is counting.

Each row shows an inbound or outbound arrow, the other party's number (or **Unknown**), the call widget's name (or **Untitled widget**) with a relative timestamp, a status pill, and the duration. Rows are not clickable; use **View all**.

Before your first call the panel reads *No calls yet — Activity will appear here once your call widgets are live.*

Quick actions

Three cards at the bottom.

Card	Description	Button
Workflows	*Manage your chat workflows and automation*	**View Workflows**
Knowledge Base	*{n} knowledge base(s) created*, or *No knowledge bases yet*	**Manage Knowledge Base** / **Create Knowledge Base**
Analytics	*View detailed analytics and insights*	**View Analytics**

The Knowledge Base card is the only one that changes: with no knowledge bases it switches to **Create Knowledge Base**, which is the correct first move in a new workspace.

The agent and supervisor dashboards

Agents and supervisors get a four-card personal summary instead.

Card	Description
Daily Resolved	*Tickets resolved today*
Weekly Resolved	*Tickets resolved this week*
Monthly Resolved	*Tickets resolved this month*
Active Chats	*Currently handling*

The supervisor version is the same four cards with different colours and the heading **Welcome back, Supervisor {first name}!**. It shows **the supervisor's own numbers, not their team's** — which surprises people who expect an oversight view. Team-wide figures live on **Dashboard → Agent Analytics** and the supervisor CRM analytics page.

These two dashboards refresh themselves every 60 seconds. The main dashboard does not.

Refresh, timezone, and errors

There is no refresh button. The workspace dashboard loads once when you open it and does not poll. To get fresh numbers, navigate away and back, or reload the page.

Every window on this page is measured in UTC, not your organization's timezone. If your workspace runs in, say, Sydney or Los Angeles, "today" here starts and ends at UTC midnight, so late-evening or early-morning activity can land on a different day than you would expect. The one part of the product that does honour the organization timezone is **Dashboard → Call Centre**, which is another reason its numbers differ.

The agent and supervisor dashboards use the *server's* local day boundaries, which is a third convention again.

If the data fails to load you get a toast, and the page renders with zeros rather than an error screen — so a page full of zeros can mean either an empty workspace or a failed load. Reload before concluding anything.

Why a number here differs from the analytics pages

This comes up constantly — more so now that both are in the same sidebar section — and every cause is legitimate.

Cause	Effect
Fixed vs chosen window	This page is locked to 30 and 7 days; the analytics pages use whatever range you pick
Visitor deduplication	This page sums daily uniques; they count uniques over the range
CSAT method	This page shows the latest rated day; they average the range
Message definition	The two count conversation and direct messages differently
Recent Calls has no window	It is the latest five calls ever, unrelated to the 7-day summary
Timezone	Everything here is UTC; **Dashboard → Call Centre** is in your organization timezone

If you need one authoritative number for a report, take it from the analytics pages with the date range set explicitly. Treat this page as a glance, not a source.

Troubleshooting

Symptom	Usual cause
Every number is zero	A genuinely new workspace, or a failed load — reload and watch for a toast
Avg Satisfaction reads `0/5`	No ratings collected yet, not poor scores
Weekly visitors look too high	The metric sums daily uniques, so repeat visitors count once per day
CSAT jumped overnight	It shows the latest rated day, not a weekly average
Failed calls look too low	Only the literal *failed* status counts; unanswered and busy do not
A call in Recent Calls is missing from Call Summary	Recent Calls ignores the date window
Numbers disagree with the analytics pages	Different window, timezone, or method — see the table above
Supervisor sees only their own stats	Expected; team views are the analytics pages below this one, and Support
Numbers look stale	There is no auto-refresh on this page; reload

Related

- Dashboard quick start
- Insights — the analytics pages under this section, which these tiles summarise
- Start here — first-run setup
- AI Calls — the call logs behind Recent Calls
- Chat — the widgets behind the session counts

COMPLETE MANUAL · SECTION 3

Insights

Analytics across chat, voice, the calling floor, SMS, agent ratings, surveys, and website visitors — all under Dashboard.

Dashboard sidebar: Dashboard

Who can see this: Every entry here is hidden from agents, who see only the Dashboard overview.

Complete reference for every analytics screen in the product — what each metric actually measures, and which role can open it.

These pages live in the sidebar's **Dashboard** section. They were their own **Insights** section until recently; the pages, paths and permissions are unchanged, and this guide keeps the name because "the analytics" is what it covers. What changed is where you click: **Dashboard → Widget Analytics** rather than **Insights → Widget Analytics**.

Every page here is hidden from agents, who see only **Dashboard → Overview**, the landing page. Beyond that the gating is per-tab and is not uniform, so read Who can see what before assuming a colleague sees the same tabs you do.

For the fast path, use the Quick Start.

Section map

Everything below sits under **Dashboard**, after the **Overview** entry that opens the landing page documented in the Dashboard manual.

Sidebar page	Path	What it measures
Analytics Overview	`/analytics/overview`	Top-line chat activity
Widget Analytics	`/analytics/widgets`	One chat widget at a time
Calls Overview	`/analytics/calls`	Every call in the workspace
Call Widget Analytics	`/analytics/call-widgets`	One voice agent at a time
Call Centre	`/analytics/call-centre`	Humans dialling — reps, queues, pipeline
SMS	`/analytics/sms`	SMS volume and spend
Agent Ratings	`/analytics/agent-ratings`	Customer ratings of your people
Survey Responses	`/analytics/survey-responses`	Post-chat surveys, CSAT and NPS
Monthly Insights	`/analytics/monthly-insights`	Month-over-month sentiment and topics
Agent Analytics	`/agent-analytics`	Per-agent chat resolution, for supervisors
Visitor Dashboard	`/visitor-dashboard`	Who visited the sites carrying your chat widget

Visitor Dashboard moved here from the old Audience section. It is not an `/analytics/*` tab, so it does not share the date range below, and it is documented in full in the Data manual.

`/analytics` redirects to `/analytics/overview`. Every `/analytics/*` tab is one page switching on the URL, which is why the date range persists as you move between them.

Who can see what

An agent's Dashboard section contains **Overview** and nothing else — every analytics entry is hidden from them individually, rather than by hiding the section, since the section is now their landing page too. For everyone else:

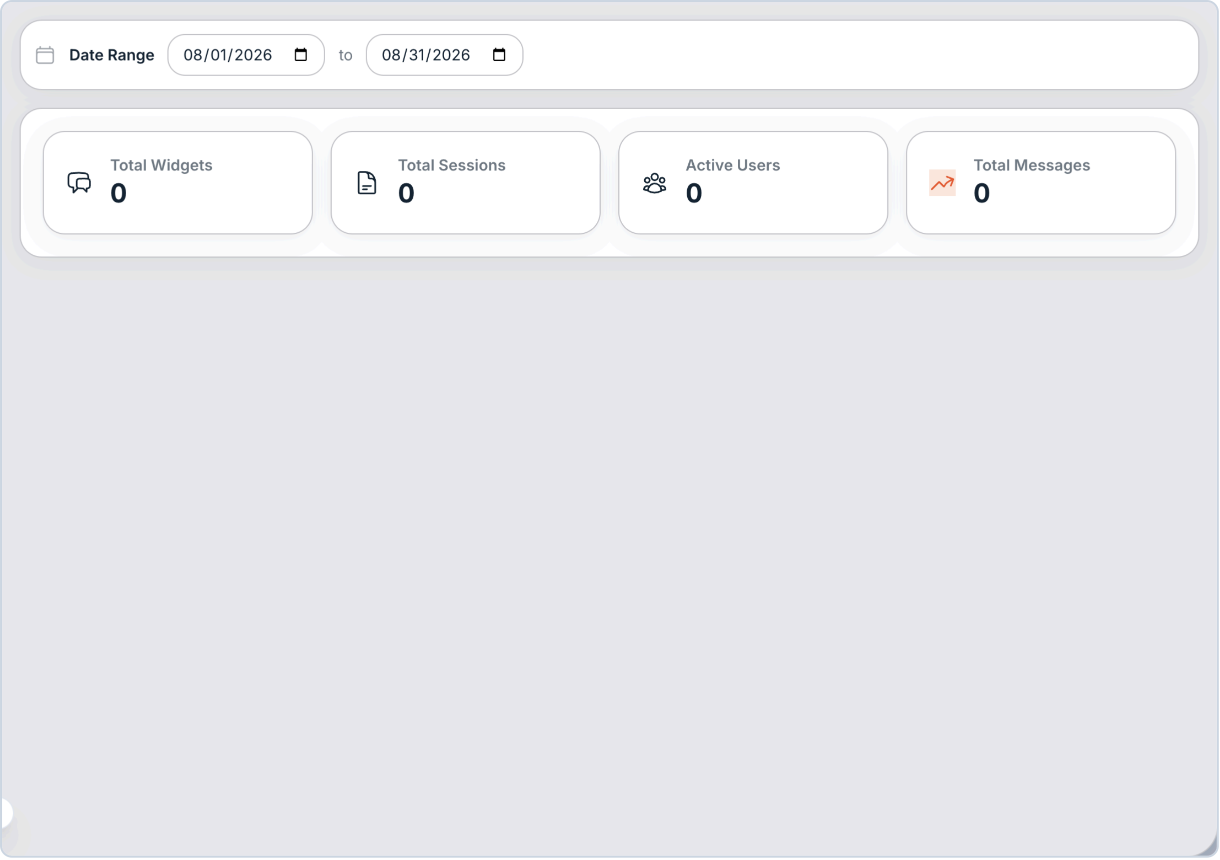
Tab	Visible to
Analytics Overview, Widget Analytics, Calls Overview, Call Widget Analytics, SMS, Agent Ratings, Survey Responses, Monthly Insights, **Visitor Dashboard**	Owner, admin
Call Centre	Owner, admin, **supervisor**
Agent Analytics	**Supervisor**, owner

Note the asymmetry: **supervisors do not see most of these pages**. They get Call Centre and Agent Analytics, and that is it.

An owner can narrow this further per role, but never widen it: the table above is the ceiling.

Only `/agent-analytics` is guarded at the route level. The `/analytics/*` tabs rely on the sidebar hiding them plus server-side authorisation, so a pasted URL may render a tab your role would not normally offer while the data behind it stays authorised.

The date range



Dashboard → Analytics Overview, with the shared Date Range control.

One **Date Range** control — two date inputs separated by **to** — sits at the top of most tabs and is shared between them. It defaults to the **last 30 days ending today**, the end date cannot be set past today, and there are no preset buttons.

Three tabs behave differently:

Tab	Window
Monthly Insights	Its own month and year selectors, defaulting to the current month
Agent Ratings	All-time ratings; the resolution counts use fixed today / this week / this month windows
Agent Analytics	Fixed today / this week / this month windows

Timezone

Chat, call, SMS, and monthly figures are computed in **UTC** — day boundaries are UTC midnight regardless of where your business is.

Call Centre is the sole exception: it is computed in your **organization's timezone**, the one set on **Setup → Organization**. This is correct — a calling floor's "day" is a local day — but it means the Call Centre tab and the Calls Overview tab can attribute the same call to different days.

Exports

There are no exports on any of these pages. No CSV, no Excel, no PDF, on any tab. The only download-adjacent controls are pagination and the Call Centre transcript-mining button. To get rows out of the product, export leads from Call Centre or a data collection from Data.

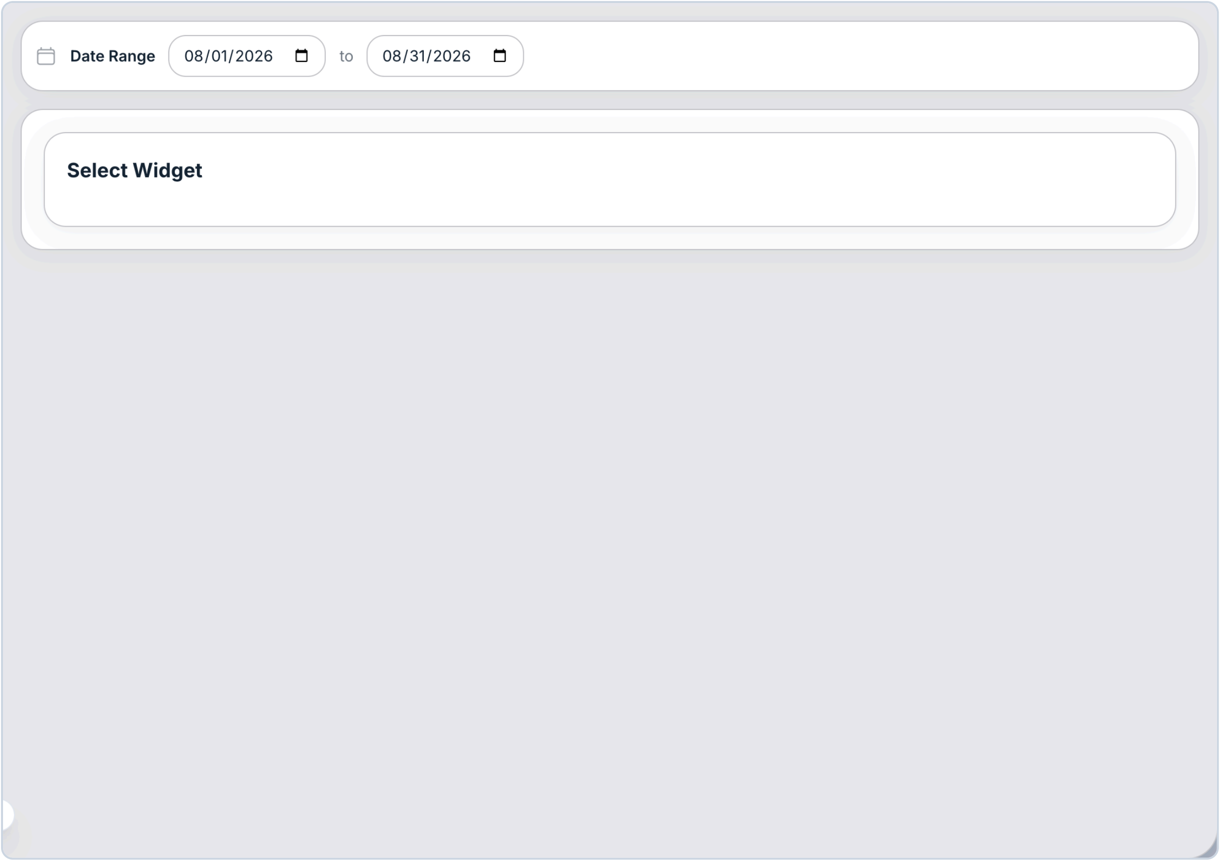
Analytics Overview

Tile	What it counts
Total Widgets	Chat widgets in the workspace — not date-filtered
Total Sessions	Conversations started in the range
Active Users	Distinct visitors whose conversation had at least one message
Total Messages	Visitor-sent conversation messages plus direct support messages

Total Widgets ignoring the date range is deliberate but easy to misread — it is a current count, not "widgets created in this period".

Two charts follow: **Trends Over Time**, an area chart with **Sessions**, **Messages**, and **Unique Visitors** series, and **Widget Performance**, a horizontal bar chart of **Sessions** and **Messages** per production widget. Test widgets are excluded from **Widget Performance**.

Widget Analytics



Widget Analytics, after selecting a widget.

Nothing renders until you pick a widget from the **Select Widget** grid — a grid of buttons, not a dropdown.

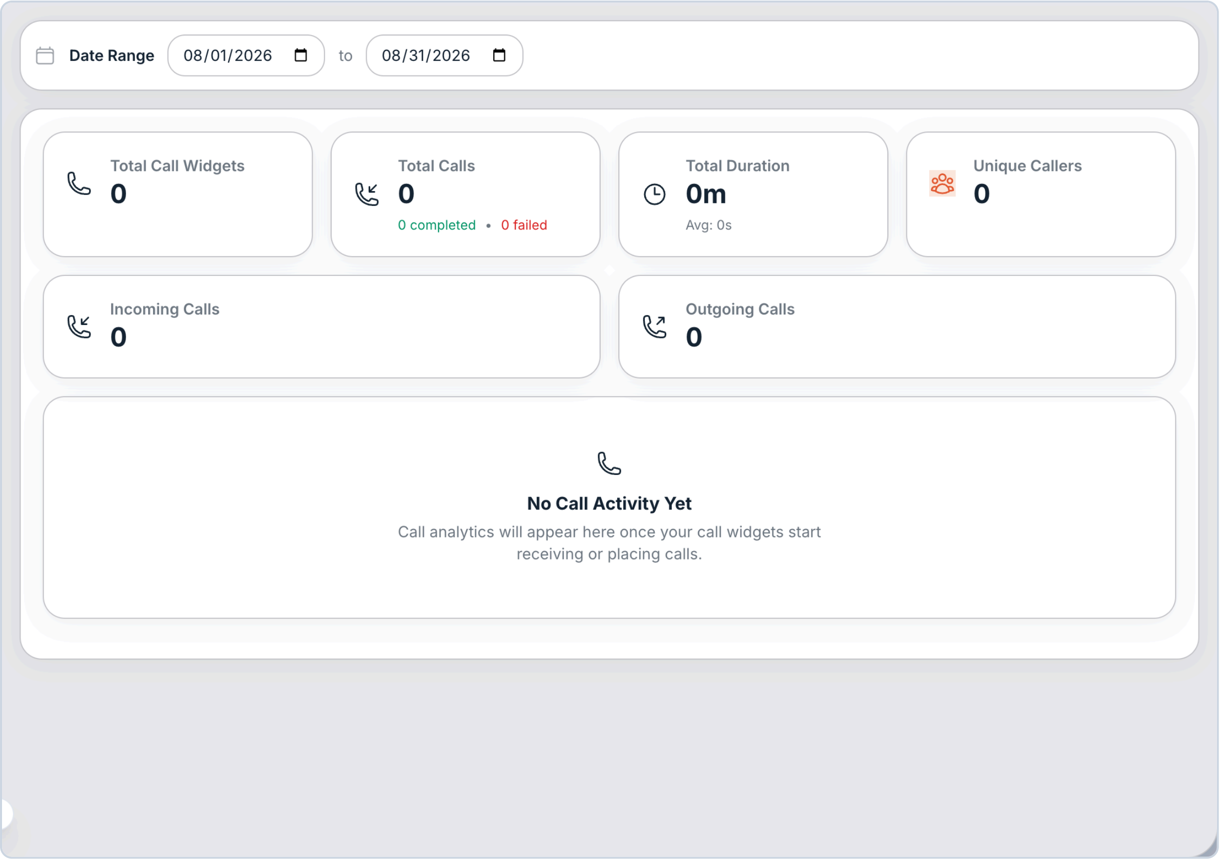
Tile	What it means
Total Sessions	Conversations for this widget in the range
Total Messages	Conversation messages plus direct messages
Avg Duration	Mean conversation length, from first to last message
Satisfaction	Average rating out of 5, or **N/A**

Satisfaction prefers support-message ratings and falls back to the conversation satisfaction rating. **N/A** means no ratings exist, which is a different statement from a low score.

Four charts: **Messages by Day**, **Top Intents** (percentages, from the AI's classification of each conversation), **Device Breakdown** (donut), and **Location Breakdown** (by country).

Top Intents is the most actionable panel of the lot. It is a ranked list of what people came to ask, and a high-volume intent your knowledge base answers badly is the clearest possible instruction about what to write next.

Calls Overview



Calls Overview.

Every call in the range — AI-handled and human-handled, inbound and outbound, across all providers.

Tile	What it counts
Total Call Widgets	Voice agents in the workspace
Total Calls	All calls, with **{n} completed** and **{n} failed** underneath
Total Duration	Total talk time, with **Avg:** underneath
Unique Callers	Distinct numbers, combining inbound callers and outbound recipients
Incoming Calls	Inbound only
Outgoing Calls	Outbound only

Empty state: **No Call Activity Yet** — *Call analytics will appear here once your call widgets start receiving or placing calls.*

Charts: **Calls Over Time** (**Total Calls**, **Completed**, **Failed**), **Talk Time (minutes)**, **Call Widget Performance**, and donuts for **Status Breakdown**, **Sentiment**, and **Provider Breakdown**.

Sentiment comes from the AI's post-call classification. It is a useful trend and a poor absolute — read the direction of travel, not the exact split.

Call Widget Analytics

Pick one voice agent from **Select Call Widget**; each entry is labelled with its direction and id. With none created you get *No call widgets yet — create one to see per-widget analytics.*

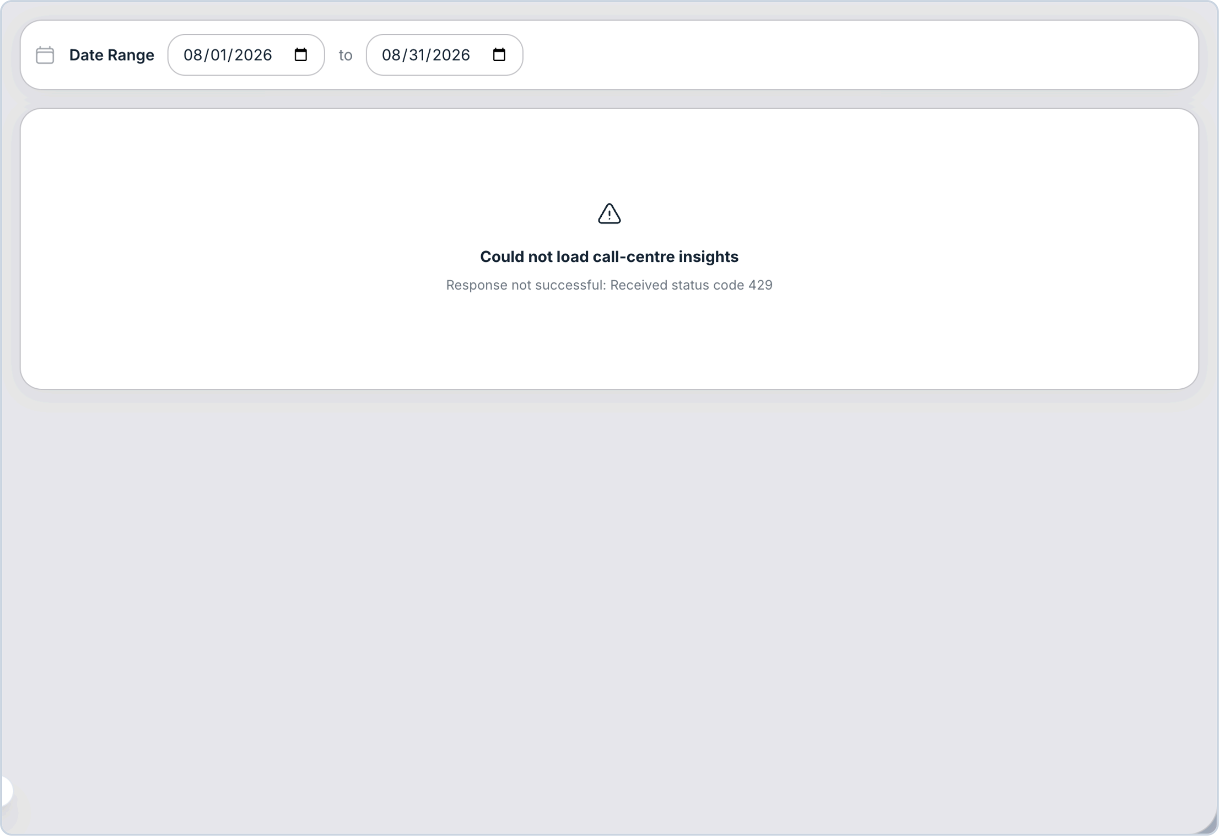
First row of tiles: **Total Calls**, **Completed** (with a completion percentage), **Failed**, **Avg Duration** (with the total underneath).

Second row: **Incoming**, **Outgoing**, **Unique Callers**, and **LLM Tokens** — the last carrying **{n} tools • {n} barge-ins** underneath.

LLM Tokens, tool calls, and barge-ins are the diagnostic row. A high barge-in count means callers are interrupting the agent, which usually means its turns are too long. Tool calls tell you whether the agent is actually using the abilities you gave it.

Then **Calls by Day**, **Talk Time by Day (minutes)**, **Top Intents**, and donuts for **Status Breakdown** and **Sentiment**. Empty: *No calls for this widget in the selected date range.*

Call Centre



Dashboard → Call Centre.

The only tab about **human** calling, and the only one in your organization's timezone. It covers rep calls only — AI calls are excluded.

Two prerequisites: your role must be owner, admin, or supervisor, and the workspace must have call-centre phone numbers. Without numbers the tab errors rather than showing zeros. The maximum range is **366 days**.

A caption under the header states the range and timezone explicitly — *"{n} day(s), counted in {timezone}. Rep calls only."* — which is worth reading before comparing anything here to another tab.

Summary and queue tiles

Tile	What it means
Dials	Total rep calls, with the inbound/outbound split underneath
Connect rate	Connected calls as a share of dials
Talk time	Total, with average and longest underneath
Wrap-up filed	Share of dials where the rep filed a wrap-up

Wrap-up filed is a data-quality metric disguised as a performance one. Every other figure on this page — dispositions, pipeline, win rate — depends on reps filing wrap-ups. If this is low, distrust the rest of the tab.

A second row appears only when calls were offered to a queue: **Service level**, **Answered**, **Abandoned**, **Average wait**.

Panels

Panel	What it shows
Day by day	Dials in outline, connects filled, per local day
Where calls landed	Disposition mix, including an **unset** slice for unfiled wrap-ups
Speed to lead	**Within five minutes**, **Within an hour**, **Within a day**, **Never rung**
By rep	Sortable by **Dials**, **Connect**, **Talk**, **Won**, plus wrap-up and lead counts
When the phones are busy	Hour-by-weekday heatmap in local time, showing only hours with calls
Pipeline	**Closed in this range** and **Open leads by time in status, now**
What callers said	Keyword mining, behind a **Mine transcripts** button

Speed to lead measures lead creation to first human call, for leads created in the range. **Never rung** is the number to act on — it is a direct count of leads nobody called.

By rep shows target attainment as **{n}% of target**, calculated against each rep's daily target multiplied by the number of days in the range. A short range including a weekend will therefore understate attainment.

Pipeline → Open leads by time in status buckets as **under a day**, **1-3 days**, **4-7 days**, **1-4 weeks**, **over a month**. It is a snapshot of *now*, not of the range.

What callers said does not run automatically — it reads transcripts on demand, and reports how many it read.

Empty state: **No rep calls in this range**. Load failure: **Could not load call-centre insights**.

SMS

Covers SMS volume and money. The window is derived from the shared date range and clamped to between 1 and 365 days.

Tile	What it means
SMS Sent	Messages sent, with segment count underneath
Charges (period)	Spend in the window
Failed	With a failure rate, or **No deliveries yet**
Lifetime Sent	All-time, with total billed

A **Pending charges by carrier** table follows, with **Carrier**, **Pending**, **Period sent**, **Period segments**, **Period charges**, and **Lifetime billed**, plus an **Unattributed (legacy)** row for older traffic. Carriers appear as **AI Assistant**, **Twilio**, **MSG91**, **Jio**, and **Stub (test)**.

Charts: **SMS volume over time** (**Sent**, **Failed**, **Charges** on a dual axis), **Segments by carrier (period)**, **Sends by source (period)**.

Two banners matter. If SMS is suspended you get **SMS sending is suspended** with a reason — resolve it in billing before anything else, because sends are being dropped. With no traffic at all you get **No SMS activity yet**, pointing you at Integrations to configure a provider.

If the charts are empty but the tiles are not, widen the range: *No SMS sent in the selected window. Try widening the date range.*

Agent Ratings

All-time, not filtered by the date range.

Tile	What it means
Total Agents	Agents in the workspace
Agents with Ratings	How many have at least one rating
Average Rating	The mean of each agent's average

Average Rating is a mean of means, so an agent with two ratings weighs as heavily as one with two hundred. Read the per-agent list rather than this tile when the counts are uneven.

Three panels: **Agent Performance** (**Daily**, **Weekly**, **Monthly** resolved counts), **Rating Distribution** (agents per star band), and **Agent Ratings** (per-agent stars with a rating count and resolution counts). A separate **Agents Without Ratings** panel lists the rest.

Ratings come from customers rating resolved support conversations. Empty: **No Agent Ratings Yet** — *Agent ratings will appear here after customers rate resolved queries.*

Survey Responses

Post-chat surveys, over the shared date range. Configure the survey itself from the **Survey** action on a widget card in Chat.

A channel filter offers **All channels**, **AI-only chats**, and **Agent-resolved chats**.

Card	What it means
Total responses	Surveys completed in the range
Average CSAT	Shown as **{n} / 5**
NPS	Percentage of promoters minus percentage of detractors
AI vs agent	How many were resolved by each

NPS is the standard calculation — scores of 9 and 10 are promoters, 6 and below are detractors — so it ranges from −100 to +100 and is not a percentage of anything.

The **AI vs agent** split is the most strategically useful number here: it tells you what share of resolved conversations needed a human, which is the real measure of whether your knowledge base and workflows are working.

Responses are listed 25 at a time with **Previous** / **Next**, each row pilled with its CSAT, NPS, and channel, and expandable to **All {n} answer(s)**.

Monthly Insights

Its own **month** and **year** selectors, defaulting to the current month; month boundaries are UTC.

Four cards, each with a month-over-month delta: **Total chats**, **Total calls**, **Avg CSAT** (out of 5), **Avg NPS**.

Then **Chat sentiment breakdown** and **Call sentiment breakdown** pies, and ranked lists for **Top chat keywords**, **Top chat topics**, and **Top call intents**.

Empty states are specific and worth knowing: pies show **No sentiment data yet**, and the ranked lists show *No data yet — needs enriched conversations.* The second one means the AI enrichment pass has not run over your conversations, not that you had no conversations.

The emailed version

Separately from this tab, a scheduled job compiles the **previous** calendar month and sends it out on the **1st of each month at 09:00 (Asia/Kolkata)** with the subject **Monthly Insights — {organization} — {month}**. It can go by email and optionally to Teams or WhatsApp.

It only runs for organizations that have scheduled reports enabled, and the recipients come from that same configuration — see Setup → Reports.

Agent Analytics

A standalone page at `/agent-analytics`, for **supervisors and owners**, and the only one of these pages guarded at the route.

Heading **Agent Analytics** — *Monitor performance metrics for all agents in your organization*. There is a **Refresh** button and a search box (*Search agents by name or email...*).

Table columns: **Agent**, **Daily Resolved**, **Weekly Resolved**, **Monthly Resolved**, **Active Chats**. Ten rows per page with **Previous** / **Next** and a *Showing {a} to {b} of {n} results* caption. No export.

Empty: *No agents found matching your search.*

How it differs from the other agent views

There are three separate "agent performance" screens in the product, and they measure different things:

Page	Measures
Dashboard → Agent Analytics	Resolved **chat support requests** and active chats
Dashboard → Call Centre → By rep	**Telephony**: dials, connect rate, talk time, wins
Support → CRM analytics	**Tickets**: throughput, response and resolution times

None of them is a superset of the others. An agent who looks idle in Agent Analytics may have spent the day on the phone, which only shows up under Call Centre.

Why these numbers differ from Dashboard → Overview

Both are correct; they answer different questions. The two are now one click apart in the same sidebar section, which makes the discrepancy easier to notice — and no less deliberate.

Cause	Effect
Window	The landing page is fixed at 30 and 7 days; these pages use your chosen range
Visitor deduplication	The landing page sums daily uniques; these pages count uniques over the range
CSAT method	The landing page shows the latest rated day; these pages average
Message definition	The two count conversation and direct messages differently
Timezone	Both are UTC — except **Call Centre**, which is local

See Dashboard for the other side of this comparison.

Troubleshooting

Symptom	Usual cause
A tab is missing from the sidebar	Role gating — see Who can see what; supervisors see only Call Centre and Agent Analytics
Widget Analytics is blank	No widget selected — pick one from the grid
Call Centre errors instead of showing zeros	No call-centre phone numbers on the workspace, or your role lacks floor access
Call Centre disagrees with Calls Overview	Call Centre counts rep calls only, in local time; Calls Overview counts everything, in UTC
Satisfaction reads **N/A** or `0`	No ratings collected, not low scores
Weekly visitor counts look inflated	Daily uniques summed, so repeat visitors count once per day
Ranked lists say *needs enriched conversations*	The AI enrichment pass has not run yet
Agent Ratings ignores my date range	It is all-time by design
A rep's target attainment looks low	Attainment divides by every day in the range, weekends included
Dispositions show a large **unset** slice	Reps are not filing wrap-ups; fix that before trusting the pipeline figures
I cannot find an export button	There are none on any of these pages — export from the source instead
SMS charts empty but tiles populated	Widen the date range

Related

- Insights quick start

- Dashboard — the landing page these pages now sit under
- Call Centre — the floor the Call Centre tab measures
- Chat — widgets and the post-chat survey
- AI Calls — call widgets and call logs
- Support — CRM ticket analytics
- Setup — organization timezone and scheduled reports

COMPLETE MANUAL · SECTION 4

AI Calls

Stand up an AI voice agent that answers your phone, then route, log, and dial out with it.

Dashboard sidebar: AI Calls

Who can see this: Hidden from agents and supervisors.

Complete reference for the **AI Calls** section: the AI voice agent that answers your phone and places calls out.

The section is hidden from agents and supervisors. If you cannot see it in your sidebar, your role is one of those two.

For the fast path to a working agent, use the Quick Start. This page documents every page, field, and behaviour, including the parts that will bite you.

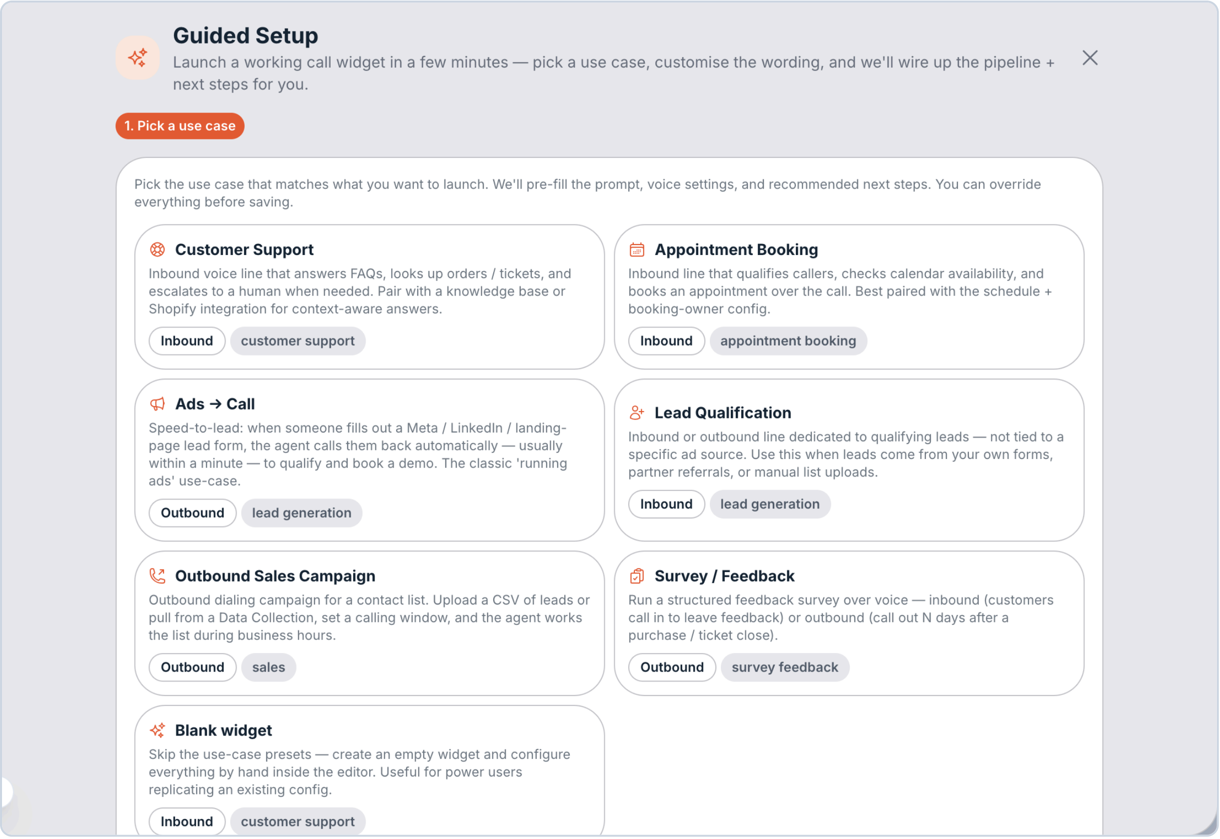
Section map

Sidebar page	Path	What it is
Call Widgets	`/call/widget`	The voice agents themselves
Call Pipeline	`/call/pipelines`	Branching conversation flows that route by intent
Phone Numbers	`/call/phone-numbers`	Numbers on this workspace and what answers them
Call Logs	`/call/call-logs`	Inbound and outbound call history, transcripts, recordings
Campaigns	`/call/campaigns`	Outbound calling campaigns from a contact list

`/call` redirects to `/call/widget`. Note the singular `widget` in the URL against the plural **Call Widgets** label.

Guided Setup

AI Calls → Call Widgets → Guided Setup (`/call/setup`). Described as: *Launch a working call widget in a few minutes — pick a use case, customise the wording, and we'll wire up the pipeline + next steps for you.*



Guided Setup, step one: "Pick a use case".

The stepper is **dynamic**. It always begins with **Pick a use case** and always ends with **Review**; which of the middle steps appear depends on the blueprint you chose. **Finish setup** is appended after the widget is created. The footer shows *Step n of m* with a percentage.

Pick a use case

Blueprint cards, each pre-filling the prompt, voice settings, and recommended next steps. Cards carry pills for **Inbound** or **Outbound**, the widget type, and the vertical pack where one applies. The blueprint families are customer support, appointment booking, ads-to-call, lead generation, outbound sales, survey and feedback, and blank.

The blueprint catalogue is served from the backend, so the exact wording on each card can change without a release. Everything it sets is editable before you save.

Next stays disabled until a blueprint is selected.

Identity

Field	Notes
Widget name	Required. Validation message: *Give your widget a name.*
Primary language	16 voice locales: English (US, Canada, UK, Australia, Ireland, New Zealand, India), Hindi, Tamil, Telugu, Bengali, Marathi, Gujarati, Kannada, Malayalam, Punjabi.
Operating country	Required. Drives provider routing and what the phone step can offer.

Countries divide into two groups, and this is the most consequential choice in the wizard:

- **Self-serve · instant** — United States, Canada, United Kingdom, Australia, Ireland, New Zealand. You can buy a number yourself, immediately.
- **Manual provisioning · admin reviews within 1 business day** — India, United Arab Emirates, Singapore, Philippines, Indonesia, Malaysia, Mexico, Brazil. Carrier paperwork such as DLT and KYC requires a human step, so these are marked *(manual provisioning)* in the dropdown.

Voice behavior

Field	Guidance given in the product
Welcome message	*Spoken at the start of the call. Keep it short (under 15 seconds).*
System prompt	*The full instruction the LLM follows for every call. 100–500 words is the sweet spot.*

Both are pre-filled from the blueprint. The highest-value edits are negative constraints: what the agent must never promise, quote, diagnose, or commit to, and the conditions under which it should hand over to a person.

Phone number

Four options:

Option	When to use it
Link an existing number	You already own a number on this workspace that is free for this direction. Disabled with an explanation when none is free.
Buy a phone number	Self-serve countries only. Instant purchase; adds a recurring item to your subscription.
Request a number	Manual-provisioning countries. Files a request with the ops team. Optional **Preferred area code** and **Notes**.
Skip for now	Create the agent and attach a number later from the Phone Numbers page.

Validation blocks **Next** if you choose to link but pick no number: *Pick a number to link, or choose another option.*

Lead source

Only appears for blueprints that expect one. Framed as *Where do the leads come from?* — when a lead form is submitted, FloGPT queues a call automatically, usually within a minute.

Source	How it works
Meta lead ads	Facebook and Instagram lead forms. Meta posts each submission to FloGPT. Native integration with a signed webhook, per-form filtering, and deduplication — not a Zapier workaround. Configure the **Integration**, **Lead form** (or *Every form on this page*), and **Phone field name** (Meta's default is `phone_number`).
LinkedIn lead gen	LinkedIn Lead Gen Forms, **polled every 5 minutes** rather than pushed, so these calls go out a few minutes behind the submission.
Website or landing-page form	Any form that can POST. You get a webhook URL and a sample payload after the widget is created.
Skip for now	Add a source later from the widget's **Triggers** tab.

A **Qualification preset** decides what the agent asks and what gets captured. Presets are server-defined and everything is editable afterwards.

If nothing is connected yet, the step offers a **Connect a...** link and a **Re-check** button so you can wire the integration and come back without restarting.

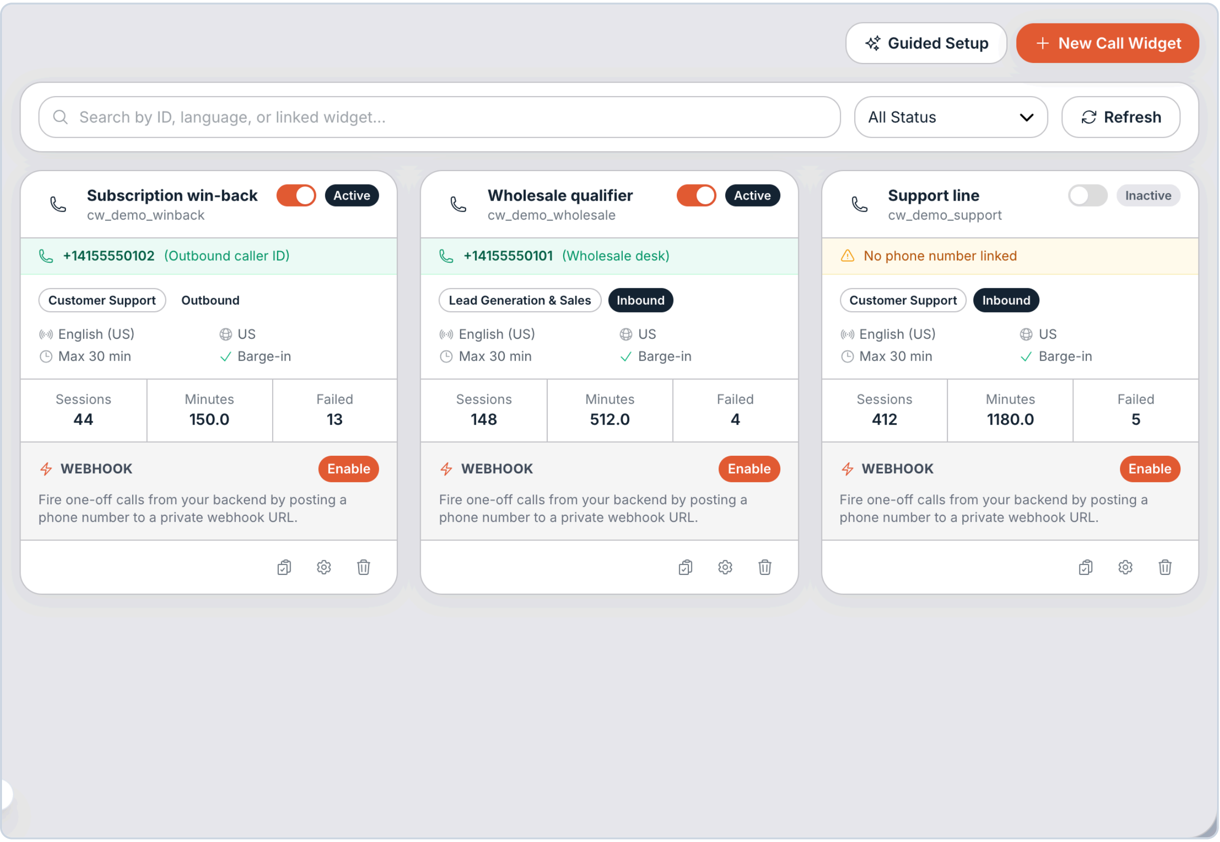
Review and create

Summary cards for **Blueprint**, **Identity**, **Behavior**, and **Phone number**. Press **Create widget**. On success you get *Widget created — finish the setup steps below*.

Finish setup

A generated checklist of what still stands between you and a working call, driven by what you skipped. Possible items include linking or buying a phone number, creating the lead trigger, creating a campaign, configuring the schedule, and getting the embed snippet. Each has **Mark as done** / **Re-open**, and the footer reads **Finish & view widget** once everything is done, or **Finish anyway** if not.

Call Widgets



The Call Widgets page.

Toolbar: a search box (*Search by ID, language, or linked widget...*), a status filter (**All Status / Active / Inactive**), and **Refresh**. Top-right: **Guided Setup** and **New Call Widget**.

Creating a widget manually

New Call Widget opens **Create Call Widget**.

Type — pick one:

Type	Description
Customer Support	Handle inbound support queries via voice
Appointment Booking	Schedule appointments and reservations over call
Lead Generation & Sales	Qualify leads and drive conversions through voice
Survey / Feedback	Run feedback surveys over voice — inbound or outbound

Types not yet available carry a **Coming Soon** pill.

Direction — **Inbound** (*Answers calls placed to the linked phone number*) or **Outbound** (*Powers calls dialed out from the linked phone number*). A phone number can host one inbound widget and one outbound widget at the same time.

Then **Name** (required), **Language**, **Country**, **Link to Chat Widget (optional)** — which enables voice calling inside your web chatbot — **Welcome Message**, and **System Prompt**. The prompt field has an **Auto-generate** button that drafts a starter prompt from the selected call type, and a word counter against the maximum.

The **Country** field predefines voice and SMS providers. India routes through DLT-compliant Jio and MSG91; the self-serve countries route through your purchased Telnyx number.

The widget card

Each card shows the name, the linked chat widget or the call widget ID, an **Active** / **Inactive** toggle, the linked phone number or *No phone number linked*, the type and direction, the maximum call length, and whether barge-in is on.

The Active toggle is disabled until a phone number is linked — the tooltip reads *Link a phone number to activate*. This is the first thing to check when an agent appears not to work.

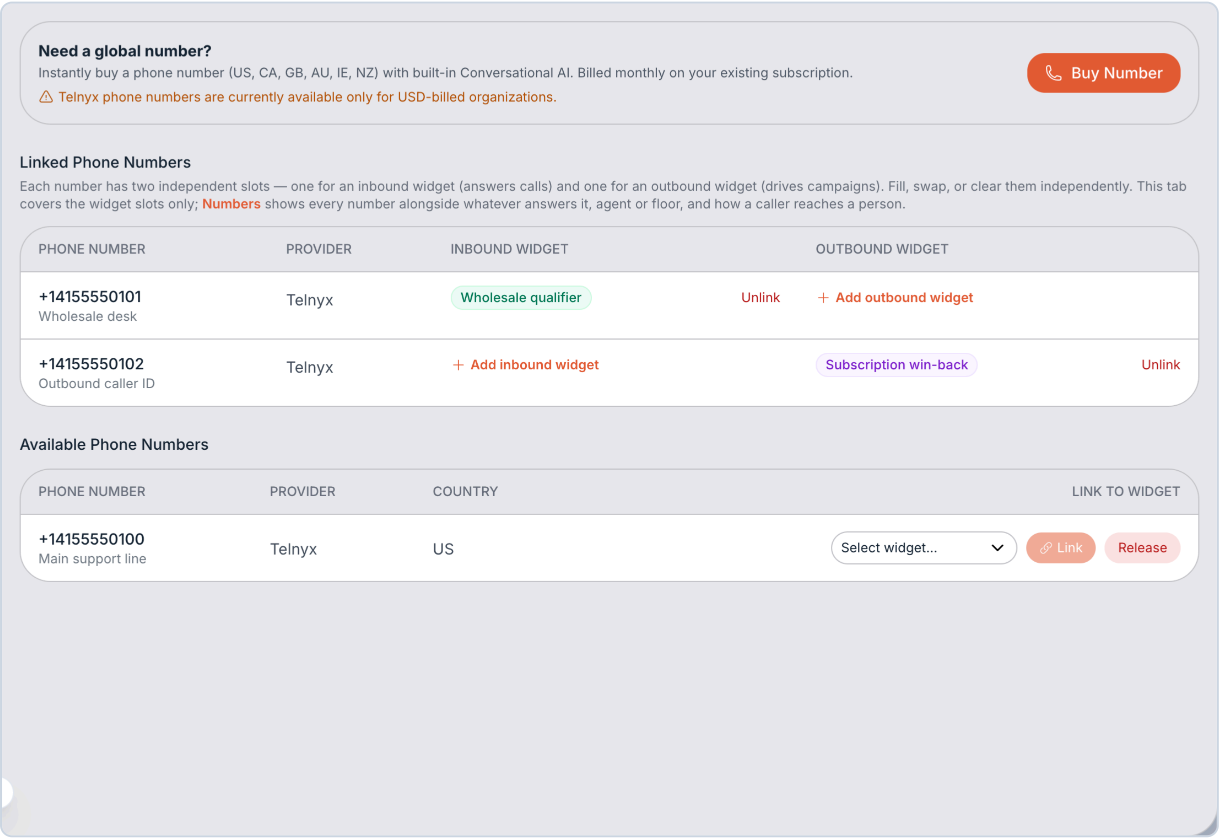
Card actions: **Configure**, **Delete**, and a post-call survey button.

Configuration tabs

Configure opens a dialog with tabs: **Phone Number**, **Pipeline**, **Voice & Language**, **LLM**, **Behavior**, **Schedule** (where the widget type uses one), and **Triggers**.

Triggers is where post-call actions live, and it is the most under-used part of the product. Actions can be conditioned on what the call captured — intent, sentiment, which fields were filled, keywords, or call duration — and can send SMS, WhatsApp, Messenger, or Instagram messages, send email, fire an HMAC-signed webhook, book an appointment, schedule a follow-up, write a Data Collection row, open a support ticket, or send a survey.

Phone Numbers



The Phone Numbers page.

The two-slot model

Every number has **two independent slots**: one inbound widget that answers calls, and one outbound widget that drives campaigns. You fill, swap, or clear them independently. This is why one number can both answer your front desk and dial your campaign list.

Linked Phone Numbers lists **Phone Number**, **Provider**, **Inbound widget**, **Outbound widget**.

Available Phone Numbers lists **Phone Number**, **Provider**, **Country**, and a **Link to Widget** control: choose a widget from the dropdown and press **Link**. Telnyx numbers also offer **Release**, which returns the number to the carrier and stops charges. Releasing cannot be undone.

This page covers the **widget** slots only. **Call Centre → Numbers** is the wider view: every number alongside whatever answers it, agent or human floor, and how a caller reaches a person.

Buying a number

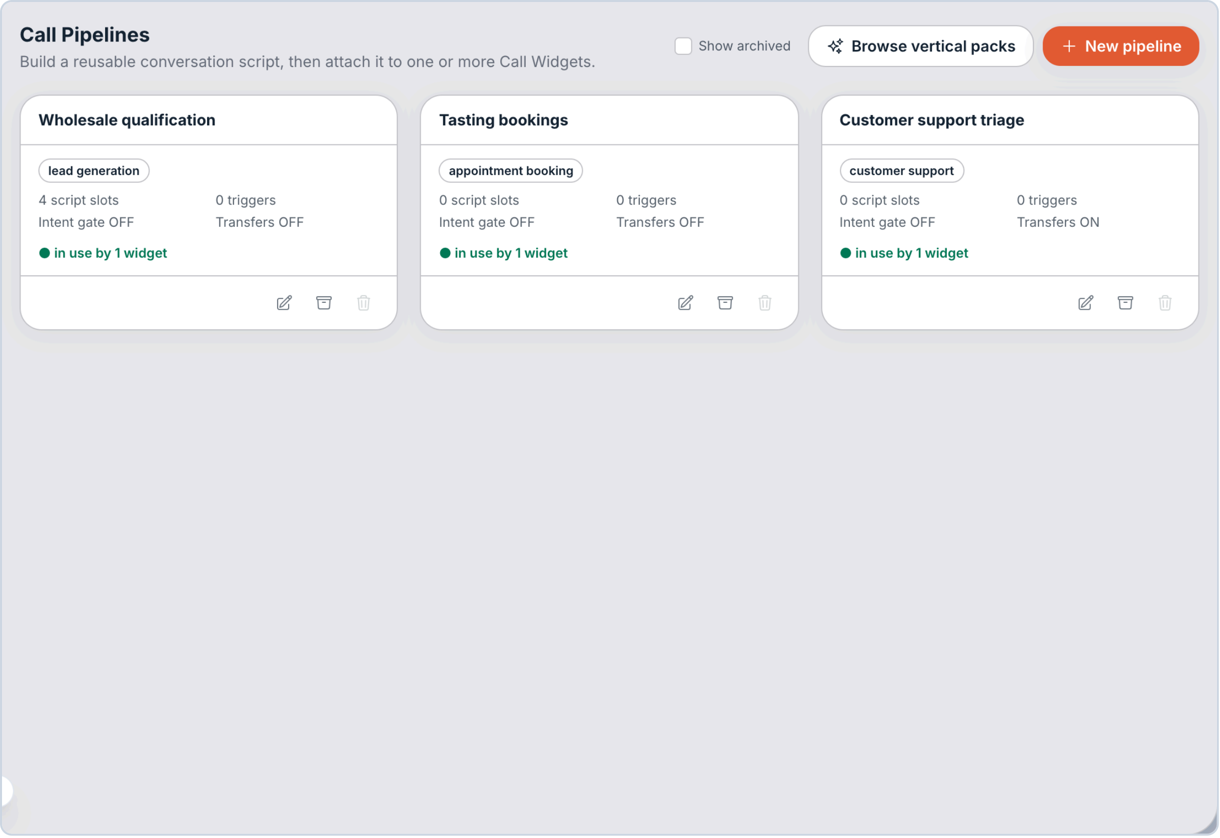
Buy Number opens **Buy a Phone Number** — *Search and instantly provision a global number with built-in conversational AI.*

Available countries: United States (+1), Canada (+1), United Kingdom (+44), Australia (+61), Ireland (+353), New Zealand (+64). Types: **Local**, **Toll-free**, **National**, **Mobile**. Filters for **Area code** and **Starts with**.

Results show **Number**, **Location**, **Features**, **Monthly**, with an **Instant** pill on quickship numbers. **Confirm Purchase** bills monthly to the card on file.

If your workspace is not eligible you will see either *Choose a Shopify plan first* or *Not eligible to purchase* with an **Add Payment Method** action.

Call Pipeline



The Call Pipeline editor.

A pipeline turns a single prompt into a branching conversation. Where a prompt says "help the caller", a pipeline routes on detected intent and captures specific, typed fields.

Field capture is stricter than it looks, and worth understanding:

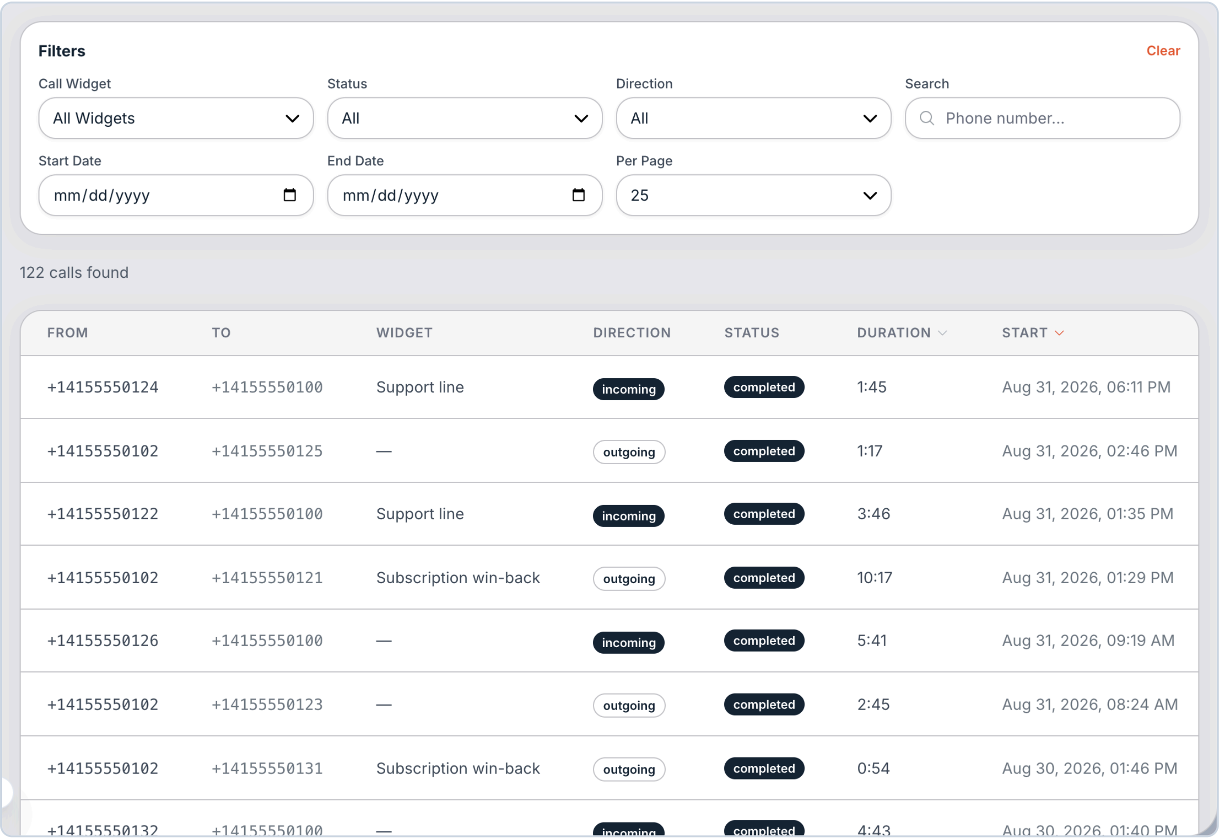
- Each field is **typed** — string, phone, email, date, datetime, number, enum, or boolean — with optional regex, minimum, and maximum validation, optional confirm-back to the caller, and a skip-if-already-known rule.
- Fields are collected **live during the call** and re-asked until valid.
- After the call an LLM re-reads the **text transcript** as a backfill pass. It never overwrites a value captured mid-call.
- The backfill is **attribution-checked**: a value is kept only if the model can cite the transcript line where the agent asked and the later line where the caller answered. Values that fail the check are discarded rather than guessed.

Post-call extraction reads the transcript text only — capped to the last 80 lines — and never the audio recording.

Captured fields land on the call log and can be written to a spreadsheet-style **Data Collection**, one row per call, with **Call ID**, **Caller Name**, **Caller Number**, and **Call Time** columns provisioned automatically, and optional Google or Microsoft Sheet sync.

They do **not** flow onto CRM contact custom fields. The only CRM write from a call creates a ticket and upserts the contact's name, email, and phone identifiers.

Call Logs



Call Logs with its filters.

Filters: **Call Widget** (default **All Widgets**), **Status** (**All**, **Completed**, **Failed**, **Active**), **Direction** (**All**, **Incoming**, **Outgoing**), a **Search** box for phone numbers, **Start Date** and **End Date**, and **Per Page**.

Columns: **From**, **To**, **Widget**, **Direction**, **Status**, **Duration**, **Start**, **End**, **Sentiment**, **Actions**. Duration, Start, and End are sortable.

Rows can carry automated-answer badges: **Voicemail**, **Call screened**, **No audio**. The **Actions** column has a call-back button and **Transcript**, which opens the transcript and the recording where one exists.

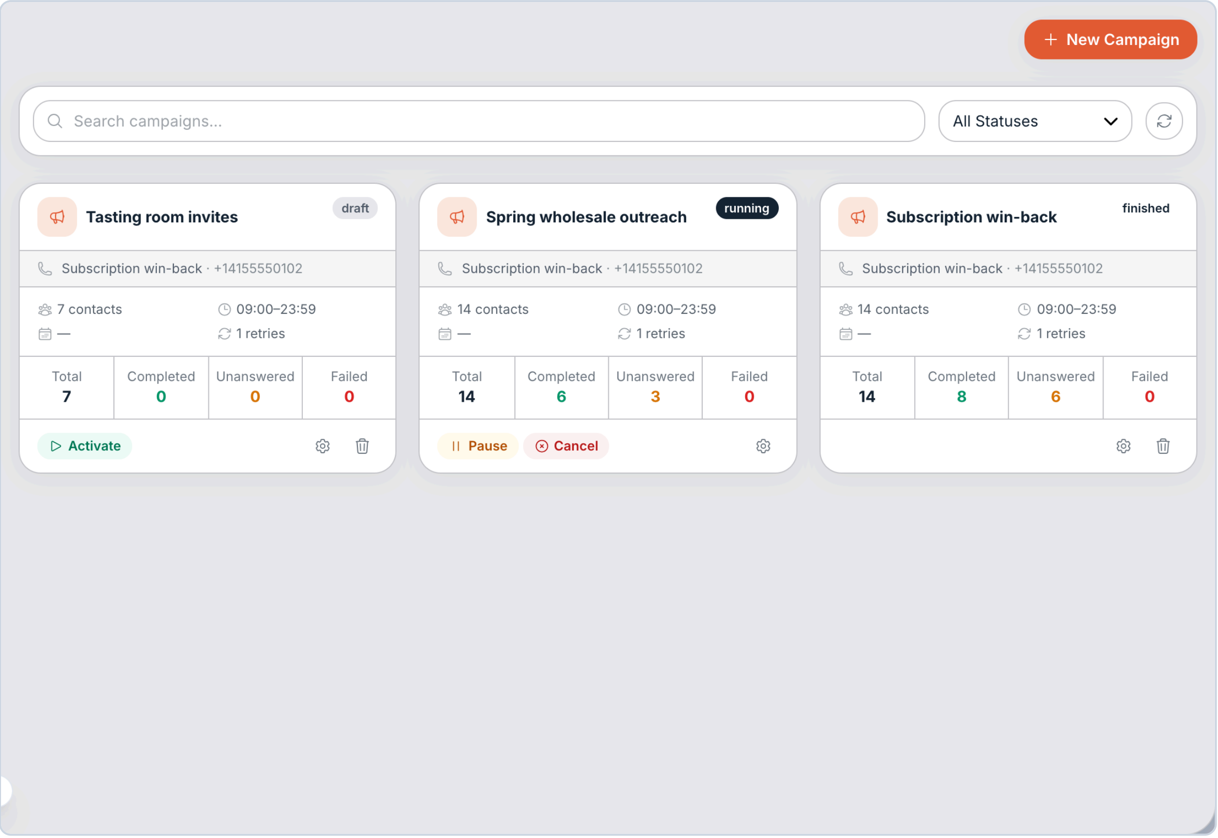
Every call records a **sentiment** (positive, negative, or neutral), a two-to-four sentence **summary**, and an **intent** with a confidence score.

What status does and does not mean

`Status` on a call log is only **ringing**, **active**, **completed**, or **failed**. There is no per-call disposition on inbound calls. Disposition-style columns — call status, attempts, summary — are written **only for outbound campaign calls**, into that campaign's source Data Collection.

If you need dispositions on inbound human-answered calls, that is the Call Centre wrap-up flow, not this page.

Campaigns



The Campaigns page.

New Campaign opens **Create Campaign**.

Field	Notes
Name	Internal.
Call Widget	Only **outbound** widgets appear here. If the list is empty you need an outbound widget first.
Starts At	Optional. Empty means start as soon as the campaign is activated.
Ends At	Optional. Calls stop after this moment.
Calling Window Start / End	Default 09:00 to 23:59, interpreted in the campaign timezone.
Timezone	Per campaign.
Concurrent Calls	1 to 50.
Retries	0 to 5, with backoff.
Retry Interval (min)	Gap between attempts.
Contacts	Optional at creation; can be attached later from campaign settings.

Card and detail actions: **Activate** / **Resume**, **Pause**, **Cancel**, **Manage campaign**, **Delete**. Statuses are **Draft**, **Active**, **Running**, **Paused**, **Finished**, **Cancelled**, **Errored**. Stats show **Total**, **Completed**, **Unanswered**, **Failed**.

The detail page (`/call/campaigns/:id`) has tabs **Contacts**, **Activity**, **Call Logs**, and **Details**, with **Manage campaign** opening **Contact source** and **Settings**. Deleting a campaign removes it and its contact list; call logs are kept.

Outbound calling responsibilities

Read this before you dial anyone. FloGPT gives you **controls**, not automatic compliance, and the gap between the two is where the legal risk lives.

- **Quiet hours and the do-not-call block list are off by default.** They are per-organization settings you have to switch on.

- **Uploaded-list campaigns do not apply them at all.** Only the campaign's own calling window applies. Quiet hours, the DNC list, and the TCPA gate are enforced on the trigger-ingest path, not on `dispatchCampaignCalls`. If you are calling an uploaded list, the calling window is your only automatic guard.
- The do-not-call list is a **manually maintained per-organization list**. There is no national DNC registry integration.
- The TCPA control is an acknowledgement checkbox that gates `+1` numbers. It does not capture or verify per-contact prior express consent.
- **The agent does not identify itself as an AI** unless your prompt tells it to. Several jurisdictions require this for outbound bots. If you operate in one, put it in the welcome message.
- **Calls are recorded, and there is no automatic announcement or opt-in.** Two-party-consent jurisdictions require disclosure. Add it to your welcome message.
- There is no automatic handling of SMS **STOP** replies. If a template invites one, someone has to action it.

Speed, honestly stated: ingest of a lead is immediate, but the dial is queued and picked up by a job that runs every minute, then has to wait for a free concurrency slot. Time-to-dial is normally under a minute, and bursts queue behind each other.

Troubleshooting

Symptom	Usual cause
Widget will not activate	No phone number linked. The toggle is disabled with that tooltip.
Calls ring but nothing answers	Number has no inbound widget in its inbound slot — check **Linked Phone Numbers**.
Campaign created but never dials	Campaign is still **Draft**; press **Activate**. Or the current time is outside the calling window in the campaign's timezone.
No outbound widget in the campaign dropdown	Campaigns only accept outbound-direction widgets. Create one.
Agent answers but ignores your business facts	No knowledge base attached, or the knowledge base is empty. See Knowledge.
Lead forms submitted, no calls	For LinkedIn, polling is every 5 minutes. For Meta, check the page is still connected and the phone field name matches your form.
Captured fields missing from the call log	Attribution check discarded them — the transcript did not clearly contain both the question and the answer.
Cannot see the AI Calls section	Your role is agent or supervisor.

Related

- AI Calls quick start
- Call Centre — human reps, dispositions, routing
- Knowledge — grounding the agent
- Insights — **Calls Overview** and **Call Widget Analytics**
- FloGPT for Shopify — in-call Shopify tools

COMPLETE MANUAL · SECTION 5

Call Centre

The human calling floor: dialer, lead queue, inbound handling, scripts, routing, and supervision.

Dashboard sidebar: Call Centre

Who can see this: Every role sees this section, but Follow-ups, Floor, Routing, Numbers, and Usage are gated.

Complete reference for **Call Centre** — the section where human reps make and take calls, and where supervisors run the floor.

Unlike **AI Calls**, this section is visible to every role in an organization. Individual pages are then gated, because a rep-facing dialer and a supervisor's wallboard are very different things.

For a rep's first day, use the Quick Start.

Prerequisites and the access gate

Two conditions have to hold before any page here does anything:

1. **The workspace owns a phone number.** Without one you see *You do not have a phone number yet — The call centre runs on a number your team answers. Get one, point it at a ring group, and the floor is live.* — with a **Get a number** action.
2. **Telephony is configured.** Without it you see *Telephony is not configured* — this needs a FloGPT administrator and is not something you can fix from the dashboard.

A rep additionally needs a **softphone credential**, which is created automatically the first time they open the call centre. Until then, calls cannot ring them. The **Incoming** and **Floor** pages both warn about reps in that state.

Numbers is the one page that opens without call centre access, because it is the page you need in order to get a number in the first place.

Section map and role gates

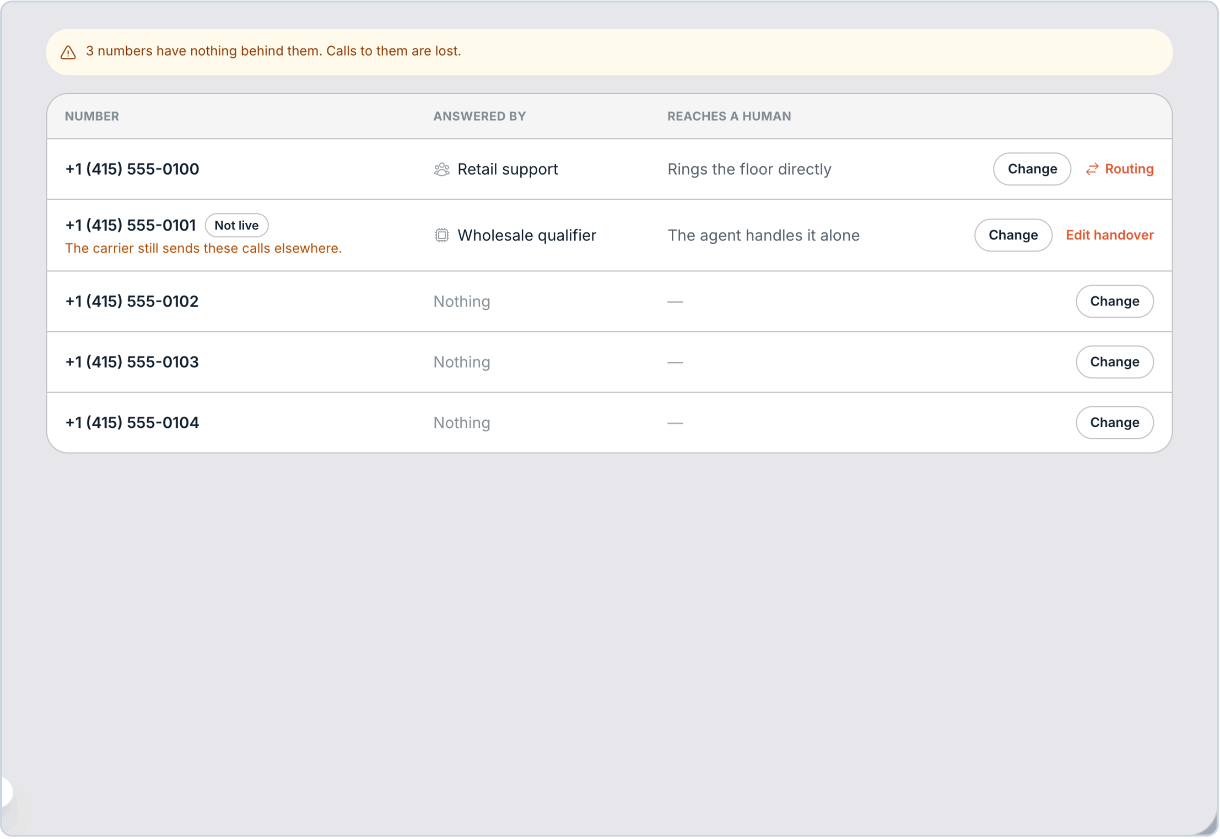
Page	Path	Who can open it
Dialer	`/call-centre/dialer`	Any role that can take calls
Queue	`/call-centre/queue`	Any role that can take calls
Leads	`/call-centre/leads`	All; agents are scoped to their own book
Incoming	`/call-centre/incoming`	All; the floor roster is supervisor and above
Missed	`/call-centre/missed`	All
History	`/call-centre/history`	All; the rep filter is supervisor and above
Scripts	`/call-centre/scripts`	All; publishing workspace-wide is supervisor and above
Templates	`/call-centre/templates`	All; editing needs owner, admin, supervisor, or editor
Follow-ups	`/call-centre/follow-ups`	Not agents, not editors
Floor	`/call-centre/floor`	Not agents, not editors
Numbers	`/call-centre/numbers`	Not agents
Routing	`/call-centre/routing`	Not agents, not editors
Usage	`/call-centre/usage`	Owners and admins only

Gate messages are explicit about the reason. **Floor** and **Routing** tell an agent *Supervisors only — This view shows the whole floor. Your own calls are on the History tab.* **Usage** tells a supervisor *This is the bill for the floor rather than the floor itself.*

Setting up the floor

Do this before letting reps in, in this order.

1. Numbers — decide what answers each number



Call Centre → Numbers: every number and what answers it.

Columns: **Number**, **Answered by**, **Reaches a human**, and actions.

Answered by is exclusive — a number has one inbound owner. It is either an AI voice agent, an IVR menu, a ring group, or **Nothing**. **Change** opens a picker that spells out the consequence before you commit, including *Nothing will answer this number. Every call to it is lost until you point it somewhere.*

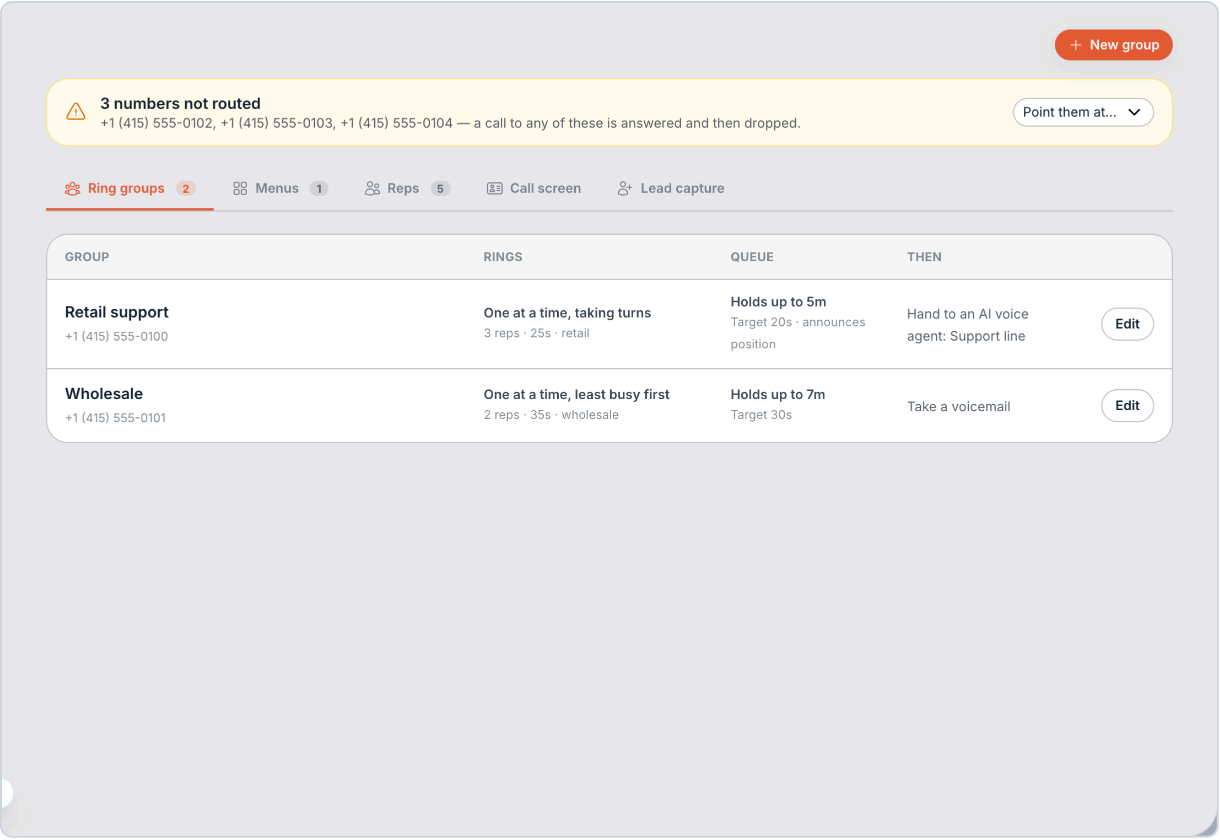
Reaches a human is the handover path. For AI-agent numbers, **Edit handover** opens a three-rung ladder:

1. **A rep on the call centre floor** — optionally a specific ring group.
2. **Ring the dashboard** — anyone with the dashboard open gets a ringing call they can claim; first to answer wins.
3. **Forward to a phone number**.

If you switch handover on but set no rung, the page warns you: *The agent will promise a person it cannot reach.* Either pick a rung or switch handover off so the agent offers a callback instead.

Banners on this page catch the four ways a floor silently fails: no live ring group at all, numbers that promise a human they cannot reach, numbers routed to the floor **on a carrier that cannot deliver it** (only Telnyx numbers can ring the floor), and numbers with nothing behind them.

2. Routing — ring groups, menus, and reps



Call Centre → Routing.

Five tabs: **Ring groups**, **Menus**, **Reps**, **Call screen**, **Lead capture**.

Ring groups are the set of reps a number rings. Per group you configure:

- **Strategy** — **Ring everyone**, **One at a time, in order**, **One at a time, taking turns**, or **One at a time, least busy first**.
- **Ring each rep for** — seconds before moving on.
- **Reps**, with an order for sequential strategies and optional **required skills**.
- **Numbers** that ring this group.
- An optional **queue**: what callers hear first, hold music, whether their place is announced and how often, when to give up, how deep the queue may get, and the **answer target** that service level is measured against.
- **When nobody answers** — **Take a voicemail**, **Say goodbye and hang up**, **Hand to an AI voice agent**, or **Forward to another number**.

Turning a group off sends its numbers straight to the overflow action.

Menus are IVR: the call is answered and the caller is asked to press a key. Each option has a digit, a label, and a destination — **Ring a group**, **Take a voicemail**, **Hand to an AI voice agent**, **Go to another menu**, **Forward to a number**, **Say goodbye and hang up**, or **Repeat this menu**. You also set how long to wait for a keypress, how many times to re-ask, what to say on a wrong key, and a final fallback. The editor warns if two options share a digit, since only the first would ever be reachable.

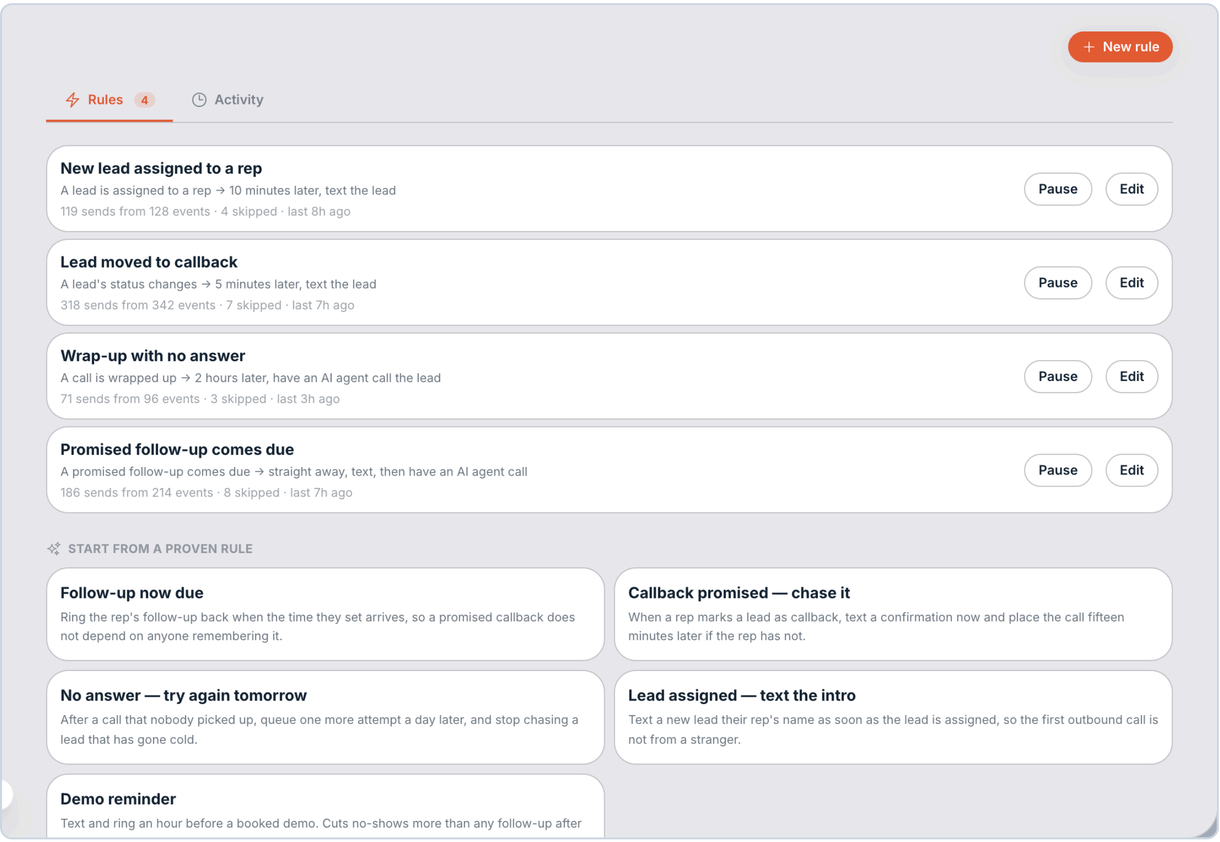
Reps covers per-person setup: whether they can take calls at all, their **skills**, **working hours** in their own timezone (including runs-past-midnight), their **outbound caller ID**, their **daily call target**, and which groups they ring for.

Turning **Can take calls** off keeps a rep's softphone but stops inbound calls reaching them — the right tool for someone on leave, rather than removing them from every group.

Call screen chooses which lead columns appear while a call rings, up to eight, workspace-wide. Empty fields are omitted rather than shown blank. Leave it unset and FloGPT guesses.

Lead capture designates the data collection new leads are filed into. **Until you pick a list, the Create lead action stays hidden** for every rep — this is the usual reason "Create lead" seems to be missing. Only lists this workspace can write to are offered; a list an integration owns is read-only. You can also name the **company column** so the Leads page can group accounts.

3. Follow-ups — rules that chase a lead automatically



Call Centre → Follow-ups.

Two tabs: **Rules** and **Activity**.

The problem this solves, as the empty state puts it: *Right now every promised callback depends on a rep remembering it.*

A rule has four parts:

- **When** — the event, plus a **delay** in minutes, hours, or days, either **after the event** or **before the event**.
- **Then** — how to reach the lead: an AI agent that places a call, an approved template, a text message, or an email with its own subject and body.
- **Only when** — conditions on lead fields, combined with **match all** or **match any**. Operators include *is*, *is not*, *is any of*, *is none of*, *includes*, *does not include*, *is set*, *is empty*, *is more than N days ago*, *is within the last N days*, *is more than*, and *is less than*.
- **Limits** — how long to leave a lead alone, and the most fires per hour.

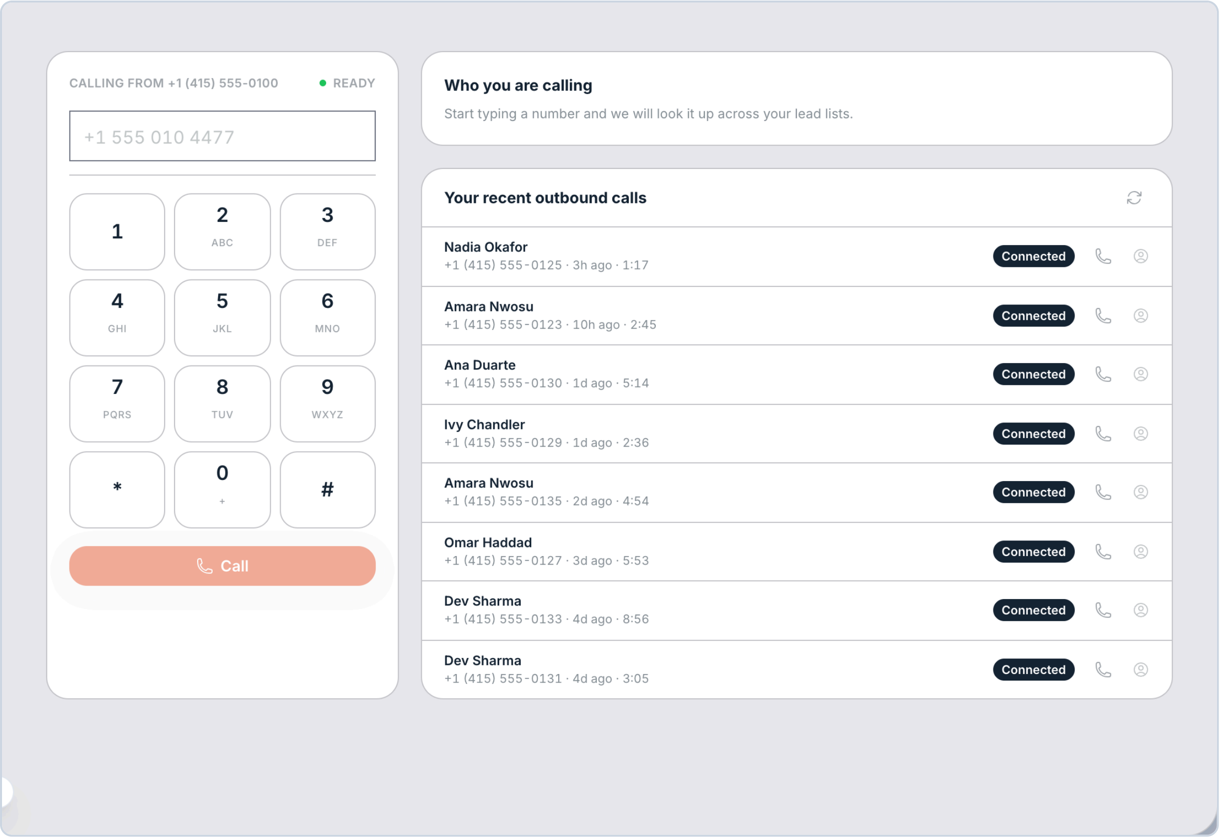
Rules can be paused, which keeps the configuration and the delivery record. Deleting takes the history with it, so pausing is usually what you want.

Activity shows every time a rule saw its event. **Queued** means it acted; anything else is the reason it did not — deduped, filtered, or an error.

Because these rules spend the workspace's call and message budget, they are gated to owners, admins, and supervisors, with the in-page message *Follow-up rules contact customers and spend the workspace's call and message budget.*

Rep-facing pages

Dialer



The Dialer.

Top-left shows **Calling from** with the rep's assigned caller ID, or *No caller ID assigned*, and the registration state — **Ready** when the softphone has registered. If no number is assigned, outbound calls show the workspace default.

To dial: type into the input, use the keypad, or type digits anywhere on the page. Backspace deletes, Enter dials. As the number becomes dialable, FloGPT debounces and looks it up across the lead lists, showing the match under **Who you are calling** with pipeline status, **Opted out** where it applies, owner, last contact, and follow-up date.

Call is disabled while another call is up, when the softphone is not connected, or when the number is not dialable. During a call it reads **On a call**.

Your day at the top of the page tracks **Dials**, **Connected**, **Connect rate**, **Talk time**, **Leads touched**, and **Won** against the rep's daily target, plus the share of their calls that are dispositioned — because an undispositioned call cannot move a lead through the pipeline.

Your recent outbound calls lists recent calls with a **Call again** button per row.

A microphone selector appears when more than one input device is available.

In-call controls

While a call is up, the dock in the corner offers **Mute**, **Hold** (with or without hold music), **Transfer**, **Add someone to this call**, **Scripts and knowledge base**, **Keypad** for sending tones to IVR menus and extensions, **Open lead**, and **Hang up**. Warm transfers add **Hand over** and **Back to caller**.

If the softphone drops you get *Softphone disconnected — You will not receive calls until this reconnects* with a **Reconnect** button.

The wrap-up

When a call ends, **Log call** opens.

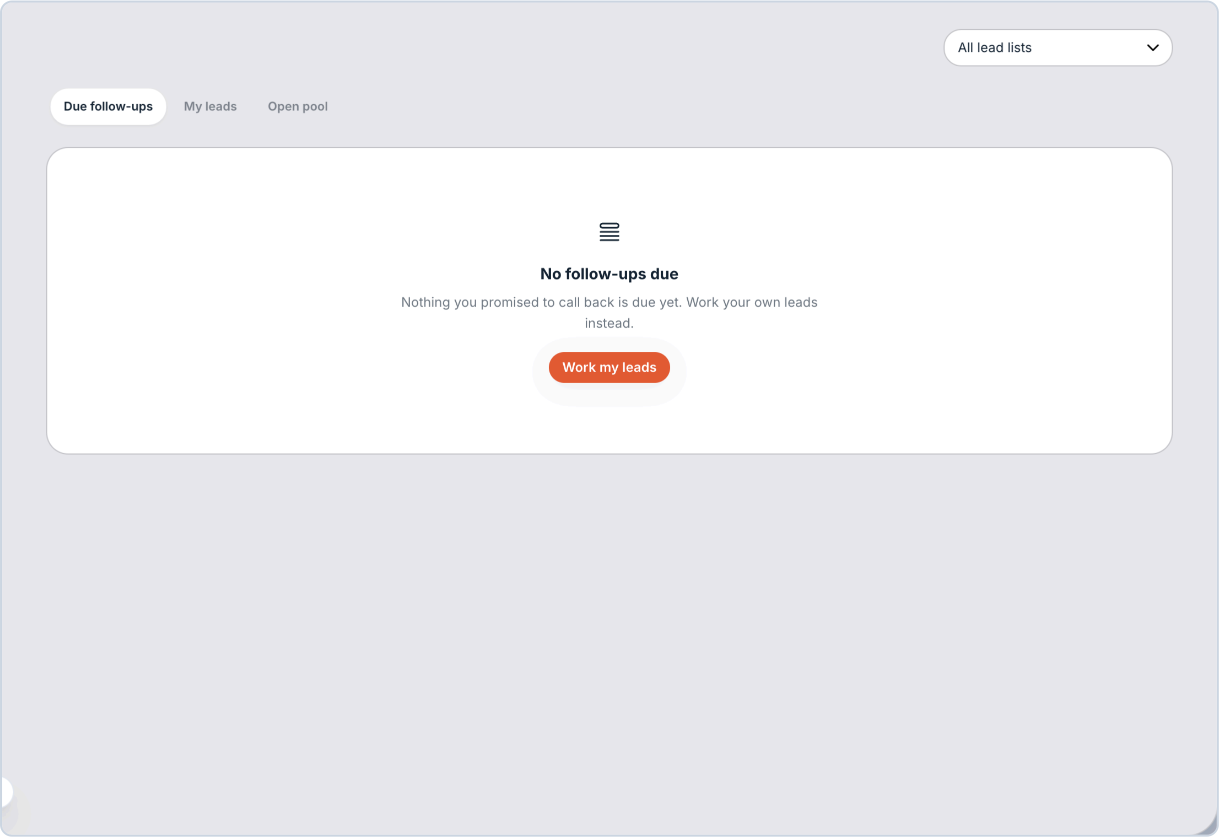
Outcome is one of **Connected**, **No answer**, **Busy**, **Unreachable**, **Voicemail**, **Wrong number**, **Failed**. FloGPT pre-selects one from the carrier's hangup reason — *Change it if you know better.*

Then **Your note** (*Internal. What you took away from the call.*) and **What the caller said** (*Verbatim where you can. This is what coaching reads.*).

On a matched lead you can also set **Pipeline status**, **Potential**, and **Follow up**, each defaulting to *Leave unchanged*. If the number is in no lead list, the call is still logged but there is nothing to update.

Closing without saving asks *Discard this wrap-up? The call will stay undispositioned.*

Queue



The Queue.

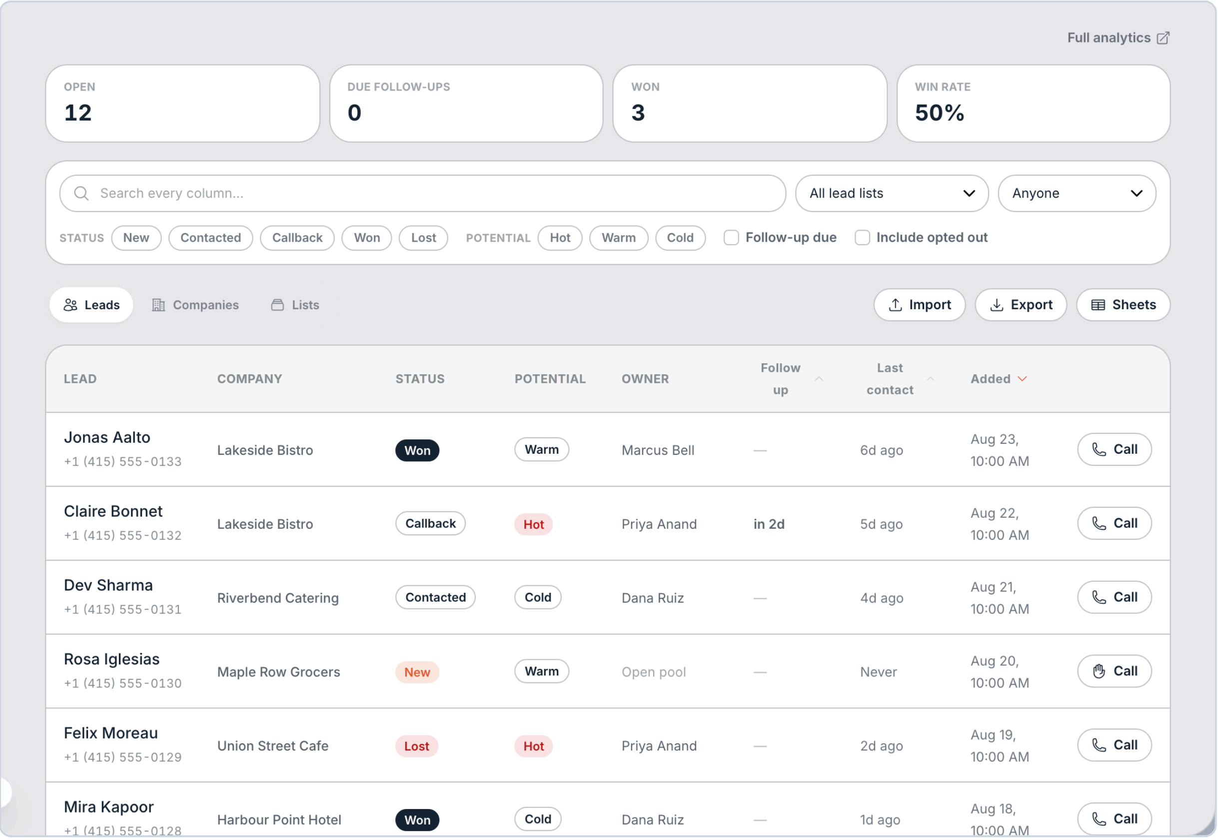
Three tabs: **Due follow-ups**, **My leads**, **Open pool**. A **Lead list** selector scopes to one collection or **All lead lists**.

One lead at a time, with its pipeline status, potential, **Opted out** flag, phone and email, when a callback was promised, last contact, tags, and a position counter. Actions are **Call** (or **Claim this lead** in the pool), **Skip**, and a reload. **Up next** on the right previews the following leads, with counts by status at the bottom.

Each tab's empty state points at the next useful tab: clear follow-ups sends you to **My leads**, an empty book sends you to the **Open pool**.

Claiming is race-safe — if another rep took the lead first you get *Another rep just took that lead.*

Leads



The Leads page.

Tiles: **Open**, **Due follow-ups**, **Won**, **Win rate**.

Filters: a search across every column, lead list, owner (**Anyone**, **Mine**, **Open pool**), **Status** chips (**New**, **Contacted**, **Callback**, **Won**, **Lost**), **Potential** chips (**Hot**, **Warm**, **Cold**), and **Follow-up due** / **Include opted out** checkboxes.

Three tabs:

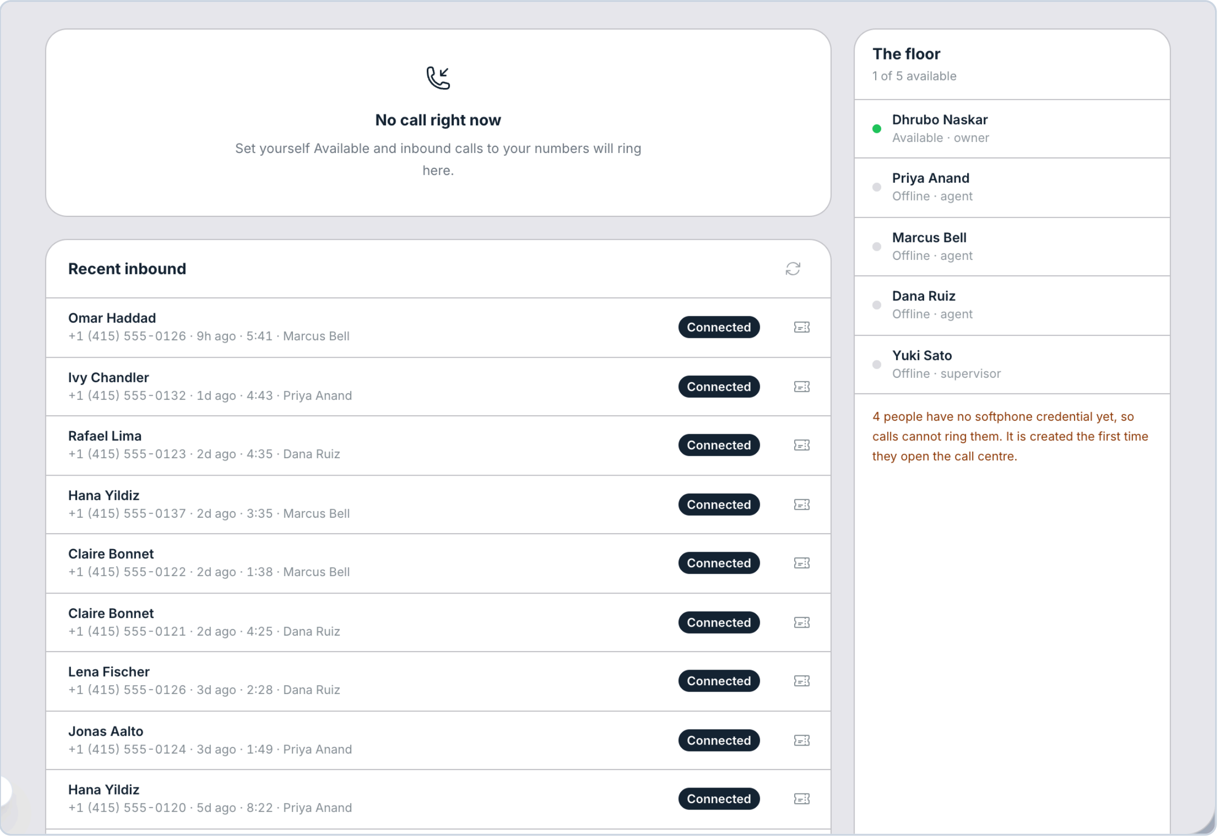
- **Leads** — columns **Lead**, **Company**, **Status**, **Potential**, **Owner** (or **Open pool**), **Follow up**, **Last contact**, **Added**, plus a **Call** button.
- **Companies** — **Company**, **Leads**, **Open**, **Won**, **Win rate**, **Next follow up**, **Last contact**. Grouping needs a company column named under **Routing → Lead capture**.
- **Lists** — **List**, **Leads**, **Open**, **Unclaimed**, **Due**, **Won**, **Win rate**, with sheet-connection state.

Clicking a row opens the lead drawer: pipeline **Status**, **Potential**, **Follow up**, **Tags**, an **Opted out of contact** checkbox, and a **History** timeline of everything that has happened to the lead. Owners, admins, and supervisors can **Claim** or **Return to pool**.

Import accepts CSV and Excel up to 7 MB. A row that matches an existing lead **updates** it rather than adding a second copy, and empty cells leave existing values alone — so a partly filled file only changes what it fills in. **Export** produces CSV or Excel of the current filter (capped at 50,000 rows) and can also download an empty template with the headers the importer understands. **Sheets** connects a lead list to a spreadsheet and keeps them in step both ways.

Agents are scoped to their own book: the owner filter defaults to **Mine**, and the **Anyone** option and the analytics link are hidden.

Incoming



Call Centre → Incoming.

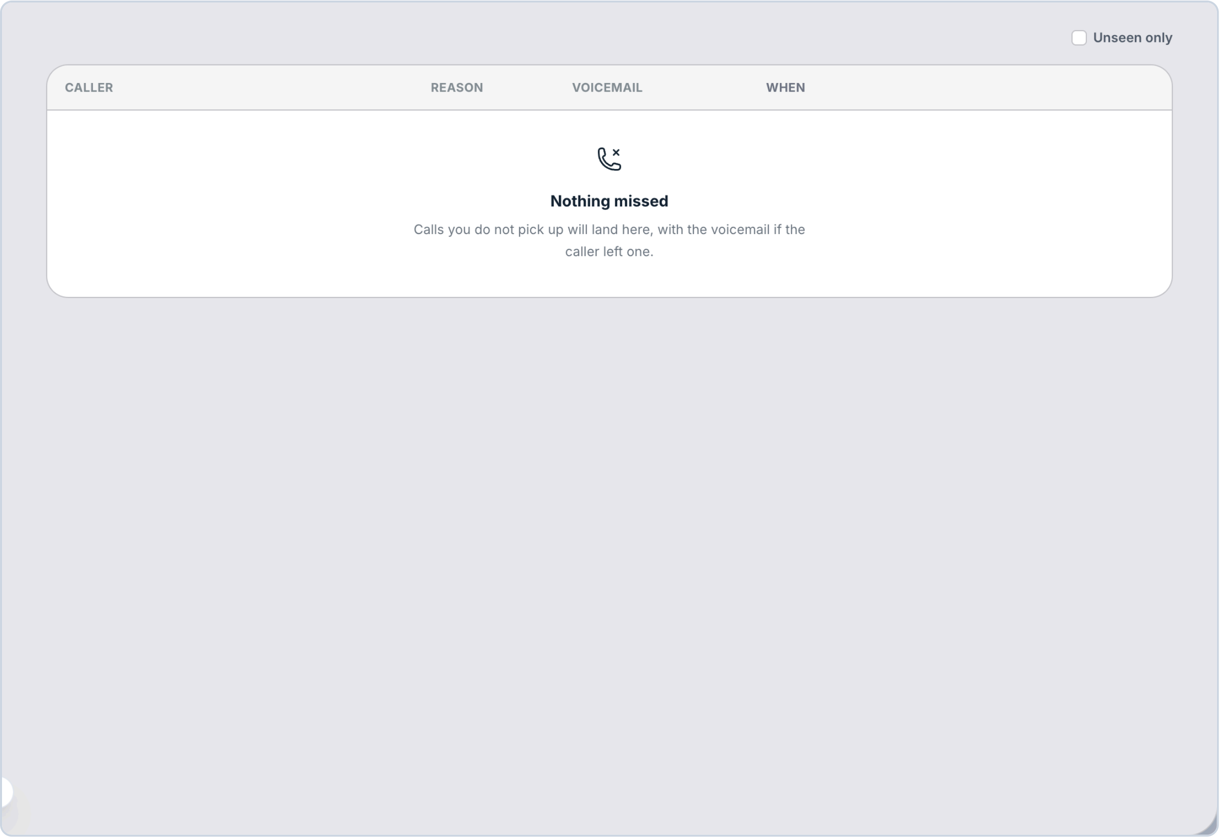
A ringing call shows **Incoming call** with the caller, the number they dialled, and **Answer** / **Decline**. During a call it shows **On a call**, noting that a matched lead means the wrap-up will offer to move its pipeline status.

The empty state is diagnostic. If someone is available it reads *Set yourself Available and inbound calls to your numbers will ring here.* If nobody on the floor is available it reads *Nobody on the floor is available, so inbound calls are going to voicemail.*

Recent inbound lists answered calls. Supervisors and above also get **The floor** — the roster with each rep's status, role, and a warning counting people with no softphone credential yet.

Presence is set from the header: **available** (*Inbound calls will ring you*), **busy** (*Skipped by inbound calls; you can still dial out*), or **away** (*Off the floor*).

Missed

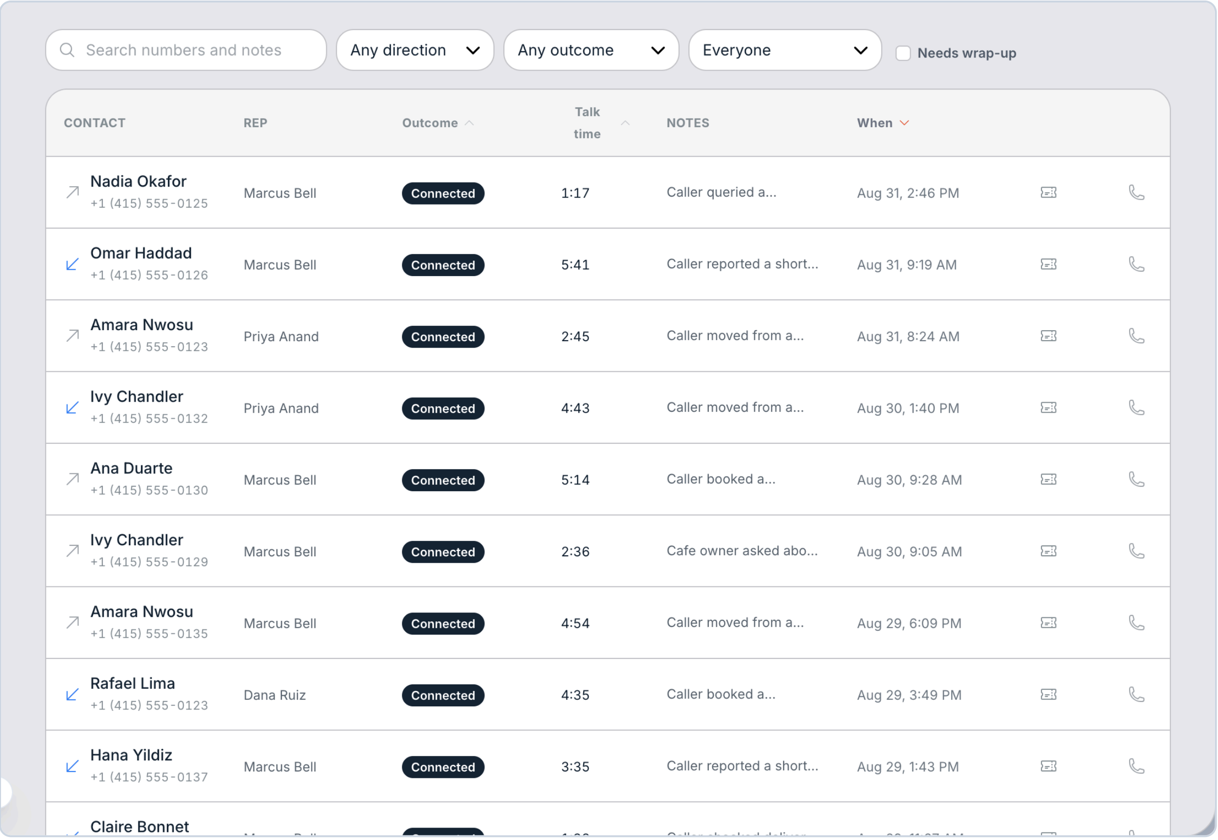


Call Centre → Missed.

Columns: **Caller** (with an unseen marker and the number dialled), **Reason**, **Voicemail**, **When**, capture actions, and either **Returned** or a **Call back** button. An **Unseen only** checkbox filters the list.

Reasons are **No answer**, **Busy**, **Failed**, **Cancelled**, **Sent to voicemail**, **Unavailable**.

History



Call Centre → History.

Filters: a search over numbers and notes, **Direction** (**Any direction**, **Inbound**, **Outbound**), **Outcome** (any disposition), a **Rep** filter for supervisors and above, and a **Needs wrap-up** checkbox.

Columns: **Contact**, **Rep** (supervisors only), **Outcome**, **Talk time**, **Notes**, **When**, capture actions, and redial.

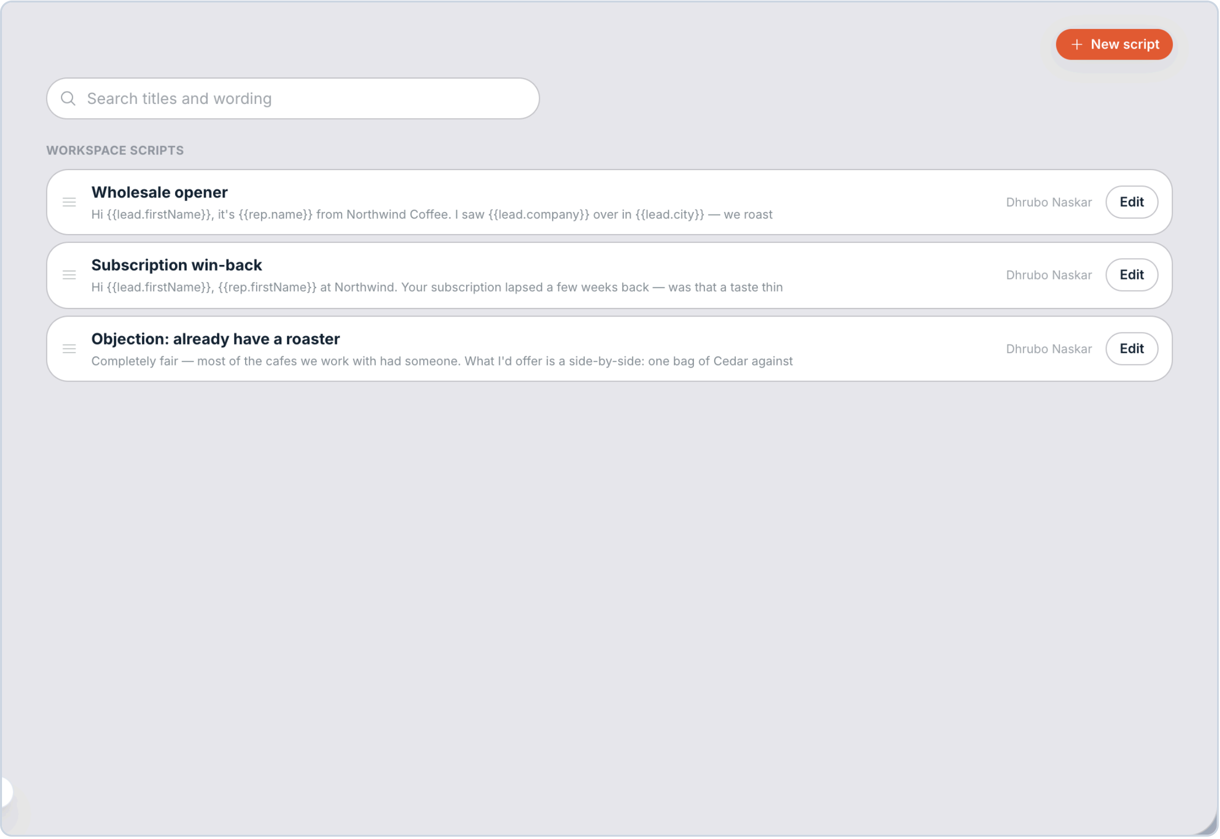
Clicking a row opens the call drawer with tabs **Summary**, **Transcript**, and **Notes** (or **Wrap-up** if the call was never dispositioned). Summary shows the AI summary, the rep's note, what the caller said, and who hung up. Only recorded calls are transcribed; the drawer distinguishes not-recorded, still-transcribing, and failed transcription.

You can disposition a call retrospectively from the **Wrap-up** tab. Saving again replaces the existing disposition and notes.

Capturing from a call

Create lead appears on missed and completed calls once **Routing → Lead capture** designates a list. **Create ticket** opens a support ticket for the call, prefilled, and tells you if the call already had one.

Scripts



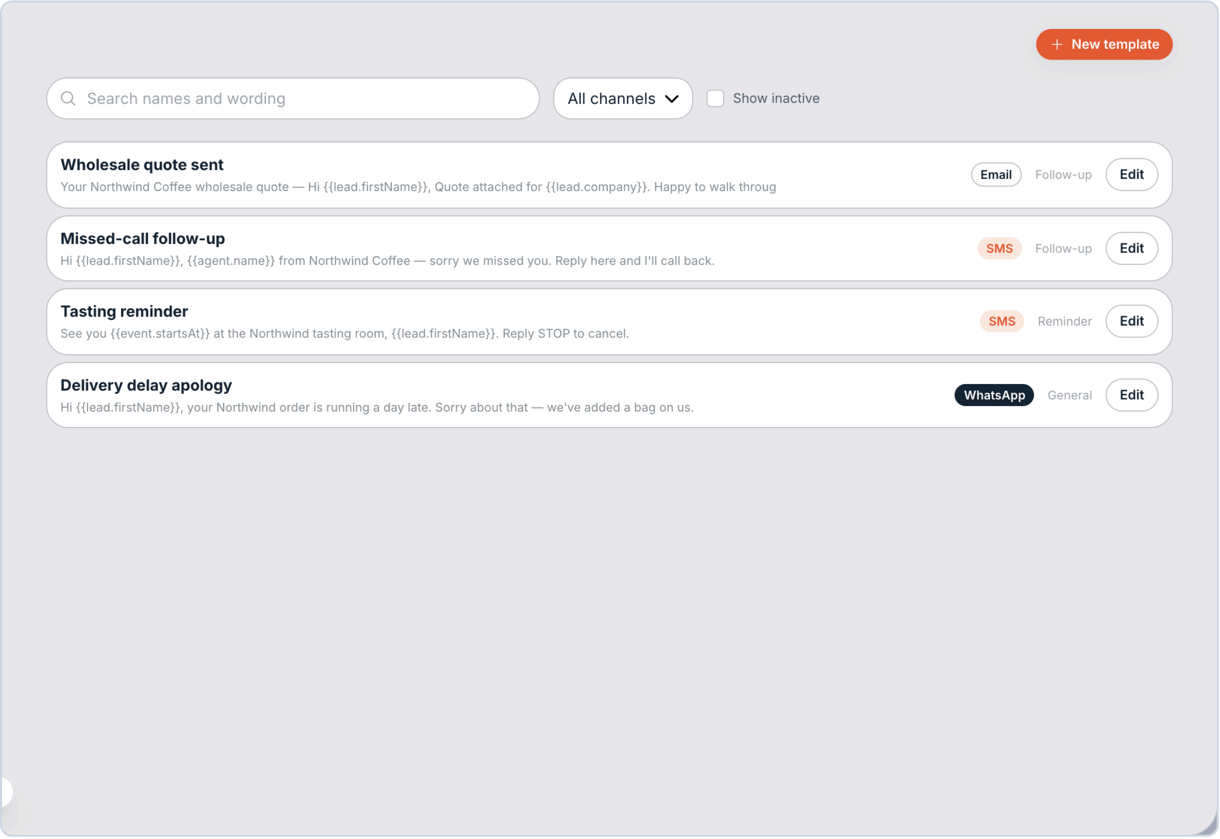
Call Centre → Scripts.

Talk tracks that appear in the in-call panel with the lead's own details filled in. Two scopes: **Workspace scripts** (*The whole workspace* — appears in every rep's in-call panel) and **Yours only** (*Just me*).

Any rep can write personal scripts. **Only supervisors and above can publish to the workspace.** A rep who cannot publish sees the lock and the note *Ask a supervisor to publish it once you are happy with the wording.*

The editor has a **Title**, a **Script** body, an **Insert a detail** token picker, and a **Preview** showing the script as a rep would read it for a sample lead.

Templates



Call Centre → Templates.

Approved copy that reps and automations send without rewriting it. Channels: **SMS**, **Email**, **WhatsApp**, **Messenger**, **Instagram**, **Voice call**. Purposes, which are only a grouping label: **General**, **Follow-up**, **Demo**, **Reminder**, **Nurture**.

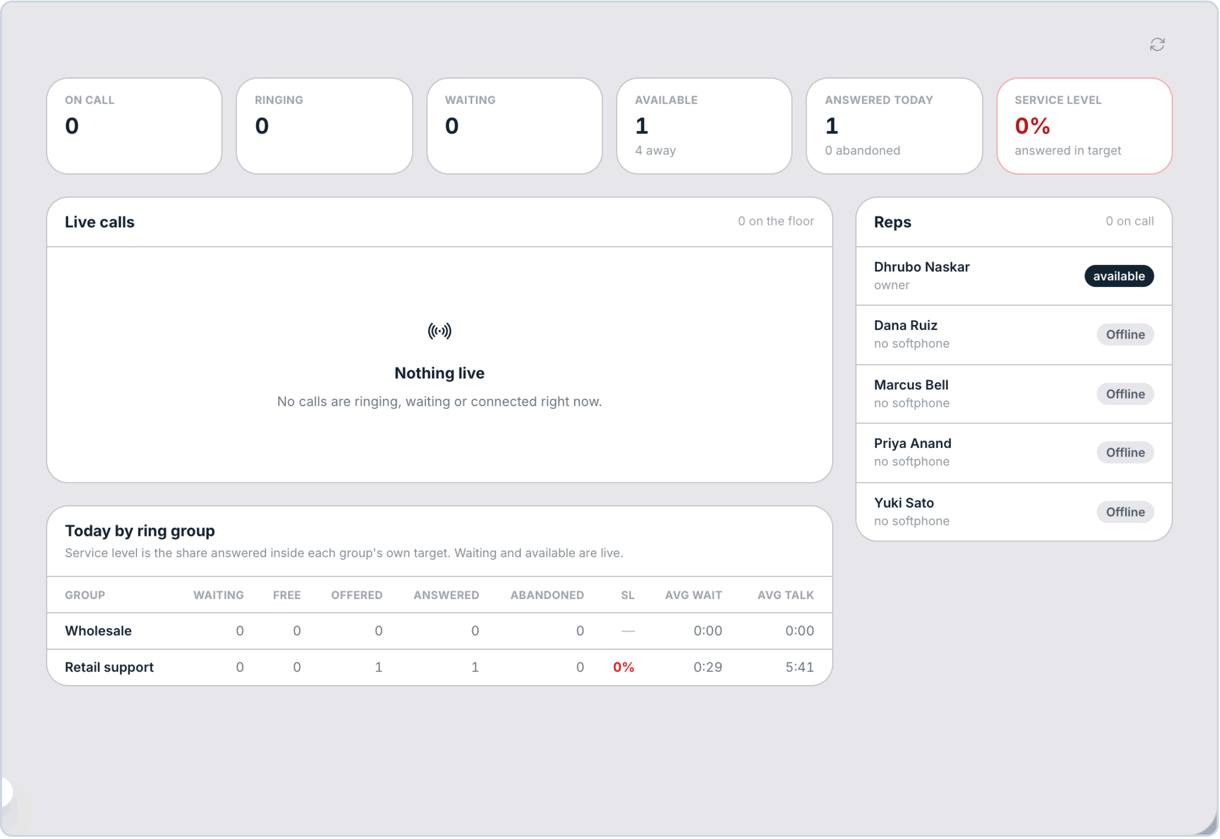
Per template: **Name**, **Channel**, **Purpose**, an **Active** flag, **Subject** for email, **Body**, a token picker, and a **Preview** against sample lead data. WhatsApp templates additionally need a **Meta template name** and **positional slots**. Indian numbers need a **DLT template id**, required by TRAI.

Turning a template **inactive** keeps it in place but removes it from pickers. That is usually what you want instead of deleting — an automation still pointing at a template will block the delete and name itself.

Editing needs owner, admin, supervisor, or editor. Everyone else gets **View**.

Supervision and billing

Floor



Call Centre → Floor.

Live totals: **On call**, **Ringing**, **Waiting** (with the longest wait), **Available** (with how many are away), **Answered today** (with abandoned), and **Service level**.

Live calls lists everything ringing, waiting, or connected, with the caller, the number dialled, the ring group, who answered and after how long, queue position, and age.

Three monitor modes per call:

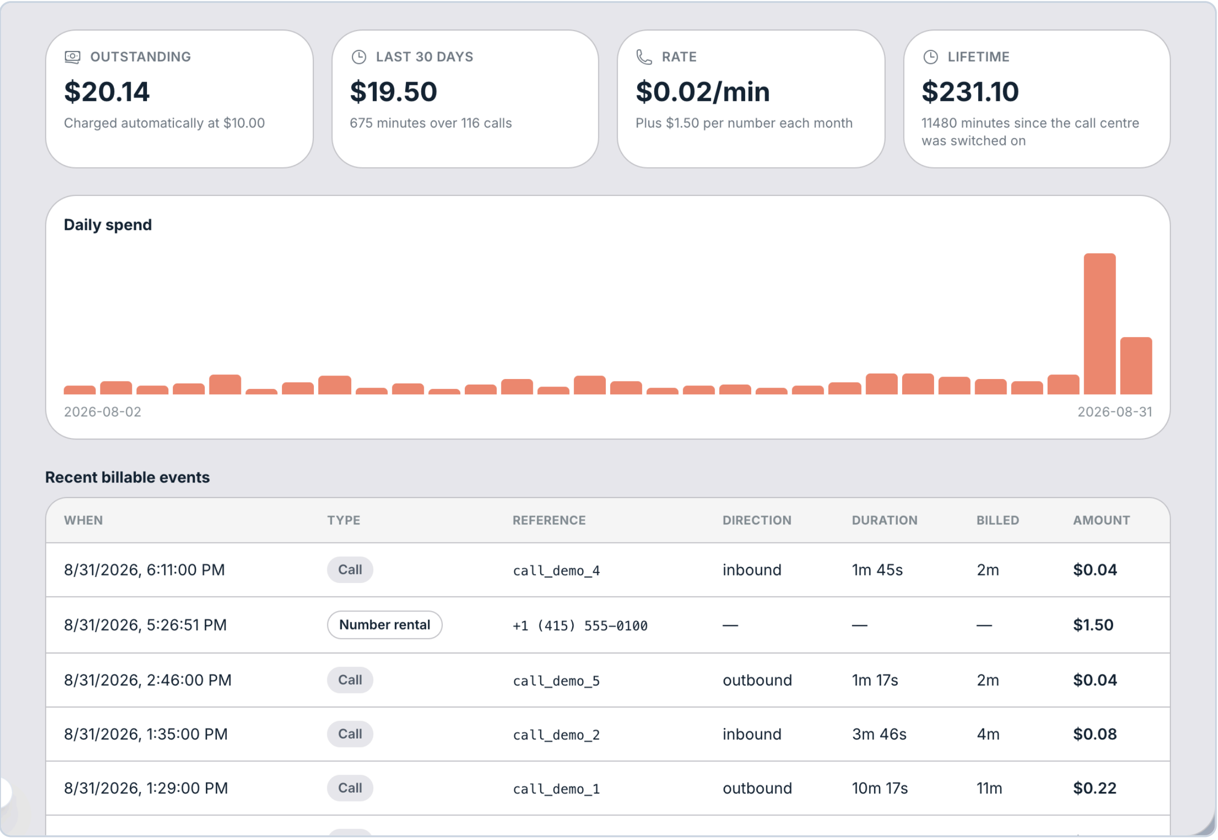
Mode	Effect
Listen	Hear the call. Nobody hears you.
Whisper	Coach the rep. The caller cannot hear you.
Join	Join the conversation. Everyone hears you.

End ends the call for everyone.

Today by ring group reports **Group**, **Waiting**, **Free**, **Offered**, **Answered**, **Abandoned**, **SL**, **Avg wait**, **Avg talk**. Service level is the share answered inside each group's own target. Inbound calls need a ring group before any of this can be measured.

The **Reps** aside lists each rep with their provisioning state and whether they are on a call.

Usage



Call Centre → Usage.

Owners and admins only, twice over — the section gate and an in-page check.

Tiles: **Outstanding**, **Last 30 days** (with minutes and call count), **Rate** (plus per-number monthly rental), and **Lifetime**. A **Daily spend** chart, then **Recent billable events** with **When**, **Type** (**Call** or **Number rental**), **Reference**, **Direction**, **Duration**, **Billed**, **Amount**.

Troubleshooting

Symptom	Usual cause
Softphone never reaches **Ready**	The rep has no softphone credential yet, or telephony is not configured.
Inbound calls go straight to voicemail	Nobody on the floor is set **Available**; the Incoming empty state says so explicitly.
A number rings nobody	No ring group is live, or the number is on a non-Telnyx carrier — only Telnyx numbers can ring the floor. The Numbers page banners this.
Create lead button missing	**Routing → Lead capture** has no designated list.
Companies tab empty	No company column named under **Routing → Lead capture**, or no list has one.
Agent cannot see other reps' leads	Working as intended; agents are scoped to **Mine**.
Cannot open Floor or Routing	Agents and editors are gated out.
Follow-up rule never fires	Check **Activity** — the result tells you whether it was deduped, filtered, or errored.
Import created duplicates	The matching column did not line up. Download the template from **Export → Download template** and re-import.
Lead won't move through the pipeline	The call was never dispositioned. Use **History → Needs wrap-up**.

Related

- Call Centre quick start
- AI Calls — the AI answering the same numbers
- Data — data collections, which lead lists are built on
- Insights — **Call Centre** analytics: dials, connect rates, scorecards, speed to lead

COMPLETE MANUAL · SECTION 6

Chat

Put an AI chat widget on your site and build the conversation workflows behind it.

Dashboard sidebar: Chat

Who can see this: Hidden from agents and supervisors.

Complete reference for the **Chat** section: the AI chat widget you embed on your website, the appearance customizer, sandbox test widgets, and the visual workflow builder.

The section is hidden from agents and supervisors.

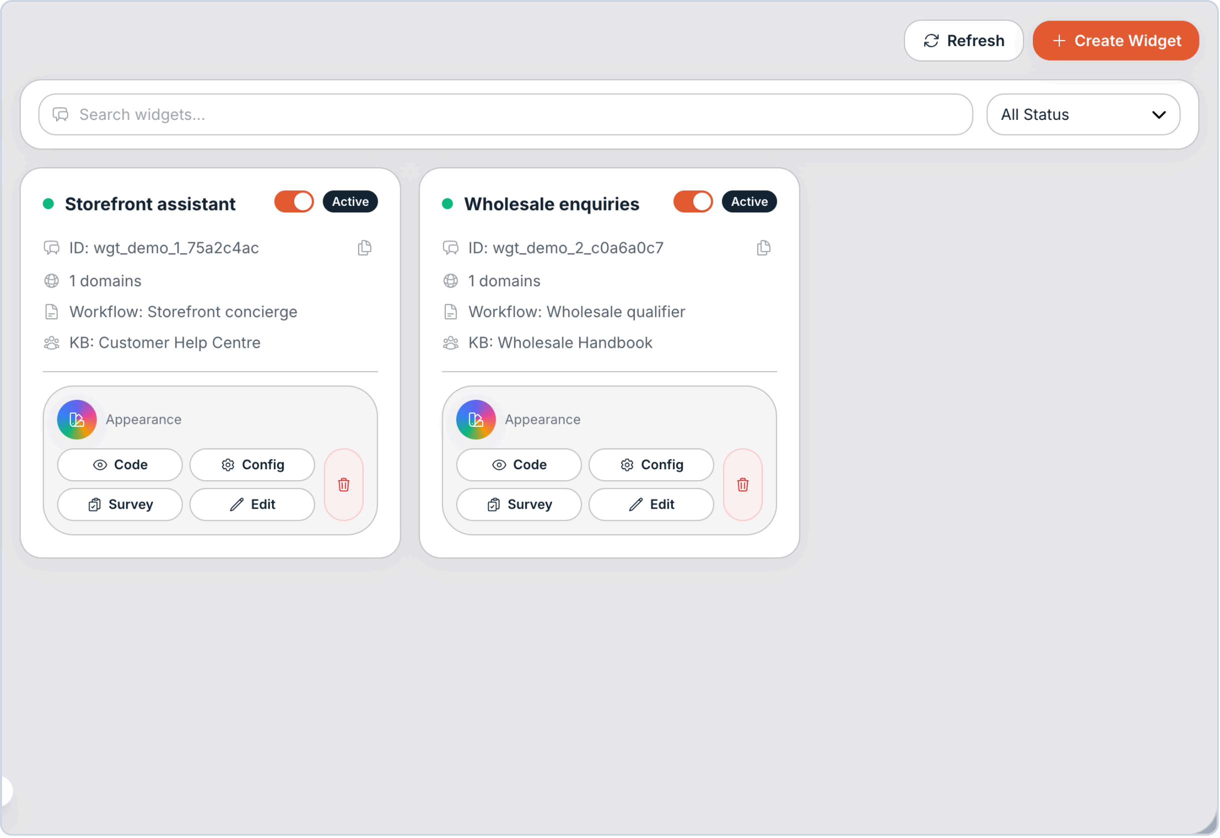
For the fast path, use the Quick Start.

Section map

Sidebar page	Path	What it is
Widgets	`/chat-widgets/widgets`	Live chat widgets you have deployed
Test Widgets	`/chat-widgets/test-widgets`	Sandbox clones for safe experiments
Workflows	`/workflows`	The conversation flows widgets execute

`/chat-widgets` redirects to `/chat-widgets/widgets`. The **Chat** group owns both URL trees, which is why **Workflows** lives here rather than in its own section.

Widgets



The Widgets page.

Toolbar: a search box (*Search widgets...*), a status filter (**All Status** / **Active** / **Inactive**), **Refresh**, and **Create Widget**.

Creating a widget

Create Chat Widget has four fields:

Field	Notes
Widget Name	Required, up to 60 characters. Internal.
Allowed Domains (comma-separated)	Domains or full URLs permitted to load the widget. Accepts `example.com`, `https://example.com/`, `www.example.com`.
Workflow (Optional)	Defaults to **No Workflow**.
Knowledge Base (Optional)	Defaults to **No Knowledge Base**. Attach one.

Allowed Domains is the single most common cause of "the widget doesn't appear". It is an exact-host allowlist: `example.com` and `www.example.com` are different entries, and both need listing if both serve your site.

Attaching a **Knowledge Base** is what makes the widget answer from your business, with inline citations, rather than from general knowledge. A widget without one is not broken, but it is a much weaker product.

The widget card

Each card shows the widget name, its **ID** with a copy button, its active state, and six actions:

Action	Opens
Appearance	The appearance customizer
Code	**Widget Configuration**, containing the install snippet
Config	**Advanced Configuration** — appearance, behavior, and LLM settings
Survey	Post-chat survey configuration
Edit	**Edit Chat Widget** — the same four creation fields
Delete	A confirmation

Installing the widget

Code opens **Widget Configuration**. Under **Integration Code** is a `<script>` block. Copy it and paste it into your site's HTML, immediately before the closing `</body>` tag.

The snippet is a self-executing function that pushes your widget id and the API and socket URLs onto a global queue, then loads the widget UI bundle followed by the widget runtime. It is asynchronous, requires no build step, and works in any CMS or theme that lets you insert raw HTML.

The dialog also shows **Widget Settings** (status and widget id) and the **Allowed Domains** currently in force — check them here when debugging. **Copy Widget ID** copies the id only, not the whole snippet, so use the code block itself for the install.

Advanced Configuration at the bottom of the dialog opens the deeper per-widget settings for appearance, behavior, and LLM configuration.

> The widget is a standalone bundle, not part of the dashboard's React app. If you are a developer editing the widget source in the repo, it has to be rebuilt separately.

The appearance customizer

Reached from **Appearance** on a widget card. A live preview sits beside the controls, and **View Full Screen** expands it.

The header shows the active theme, or **Custom (unsaved)** when you have edits with no theme, plus an **Unsaved changes** indicator.

Save, Save As, Publish — the distinction that matters

Button	What it does
Save	Stores your changes. Does **not** affect the live widget.
Save As	Saves the current settings as a named, reusable theme with a **Theme Name** and **Description**.
Publish	Pushes the saved appearance to the live widget your visitors see.
Reset	Discards local edits.

You can iterate with **Save** as much as you like without changing anything publicly. Nothing your visitors see changes until you **Publish**.

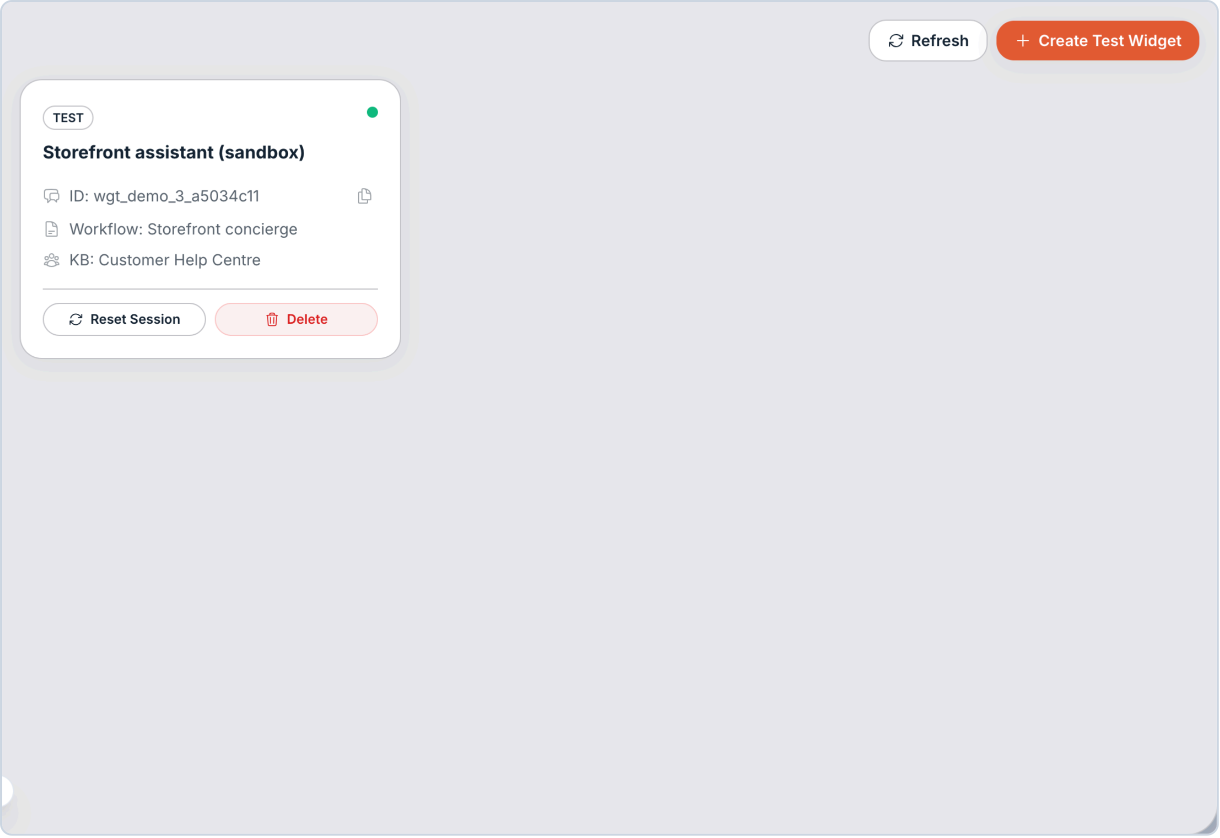
Switching theme with unsaved edits prompts **Unsaved Changes** — *You have unsaved changes. Discard them to switch themes, or go back to save first.* — with **Go Back** and **Discard & Switch**.

Setting groups

Group	Contains
Themes	Preset starting points
Chat Interface Style	A complete look for the chat window — bubbles, input field, background. Your colour choices below still override individual elements on top of the preset.
Colors	**Primary Color**, **Secondary Color**, **Message Text Color**
Shape & Layout	**Border Radius**, **Widget Position** (all four corners), **Theme Mode** (light, dark, auto)
Logo	**Upload Logo** or **Or Logo URL**
Advanced Styling	**Background Darkness**, **Message Opacity**, **Message Font Size**, **Font Family**
Suggested Question Buttons	**Button Radius**, **Button Color**, **Button Text Color**
Input Field	**Background Color**, **Text Color**, **Border Color**
Header Gradient	**Gradient From**, **Gradient To**
Custom CSS	Overrides using `.chatflow-*` selectors
Floating Button	The launcher: **Style Preset**, **Animation**, **Avatar Icon**, **Border Radius**, **Background Color**, **Text Color**, **Glow Color**, **Show Border**, **Greeting Text**
Widget Text	**Title**, **Subtitle**, **Welcome Message**, **Greeting Text**, **Placeholder Text**, **Widget Status**

Widget Text is where the words your visitors read live, and it is worth more attention than the colours. A **Welcome Message** that names what the assistant can actually do outperforms a generic greeting.

Test Widgets



Test Widgets.

A test widget is a clone of a live widget that you can experiment on without touching real traffic. Create one before making meaningful changes to a widget customers are using.

Create Test Widget asks for a **Source Widget**, then what to bring across under **Include in Test Widget**:

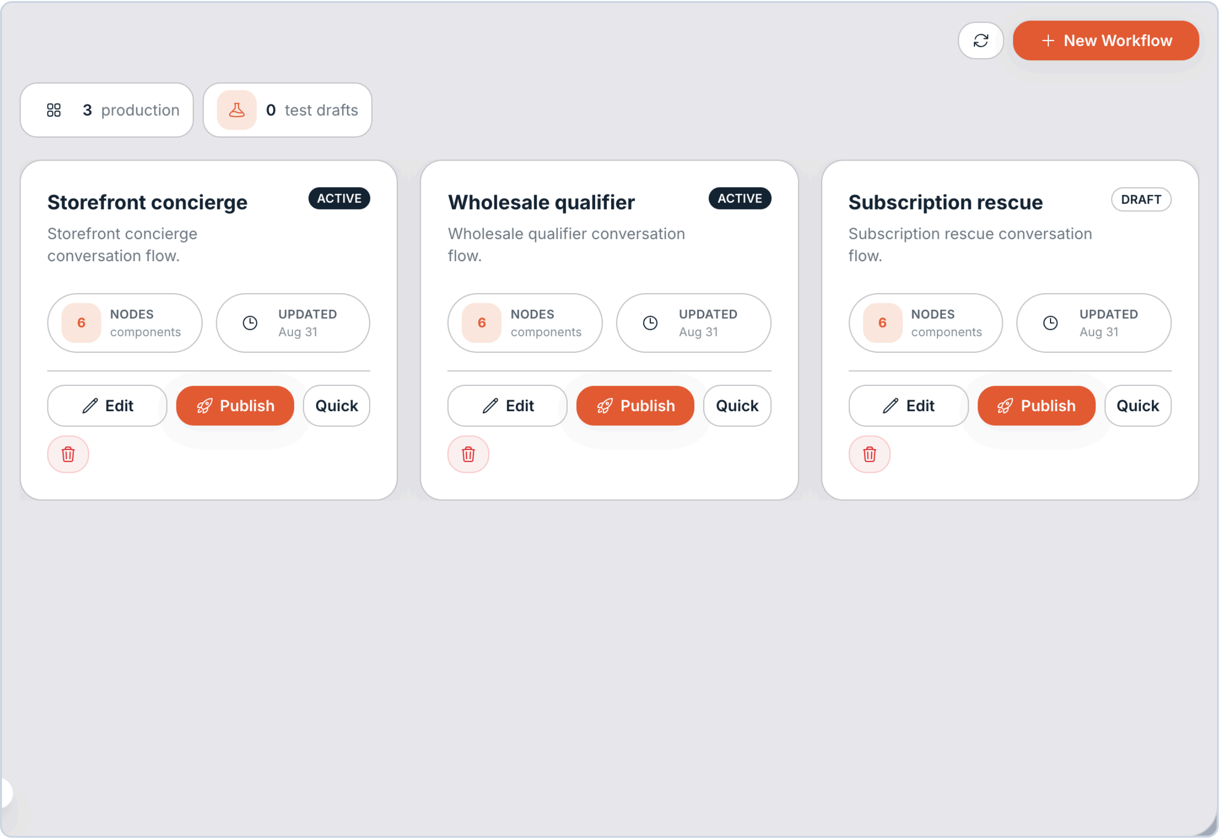
Option	Behaviour
Workflow	Clones the workflow into a separate test copy
Knowledge Base	References the **same** knowledge base — not a copy
Prompt Overrides	Copies prompt override settings
Appearance	Copies theme, colours, and styling

Note the asymmetry: the workflow is **cloned**, so editing the test copy is safe. The knowledge base is **shared by reference**, so editing that content does affect the live widget.

Test widget cards carry a **TEST** pill and add **Reset Session**, which clears the conversation so you can start from the first message again. This is the fastest way to test a workflow's opening branch repeatedly.

Deleting a test widget also deletes its cloned workflow.

Workflows



The Workflows list.

A workflow is a defined conversation: a graph of nodes the widget walks through. Use one when the conversation has to *do* something in a particular order — qualify, book, look up, escalate. For open-ended question answering, a knowledge base alone is usually better.

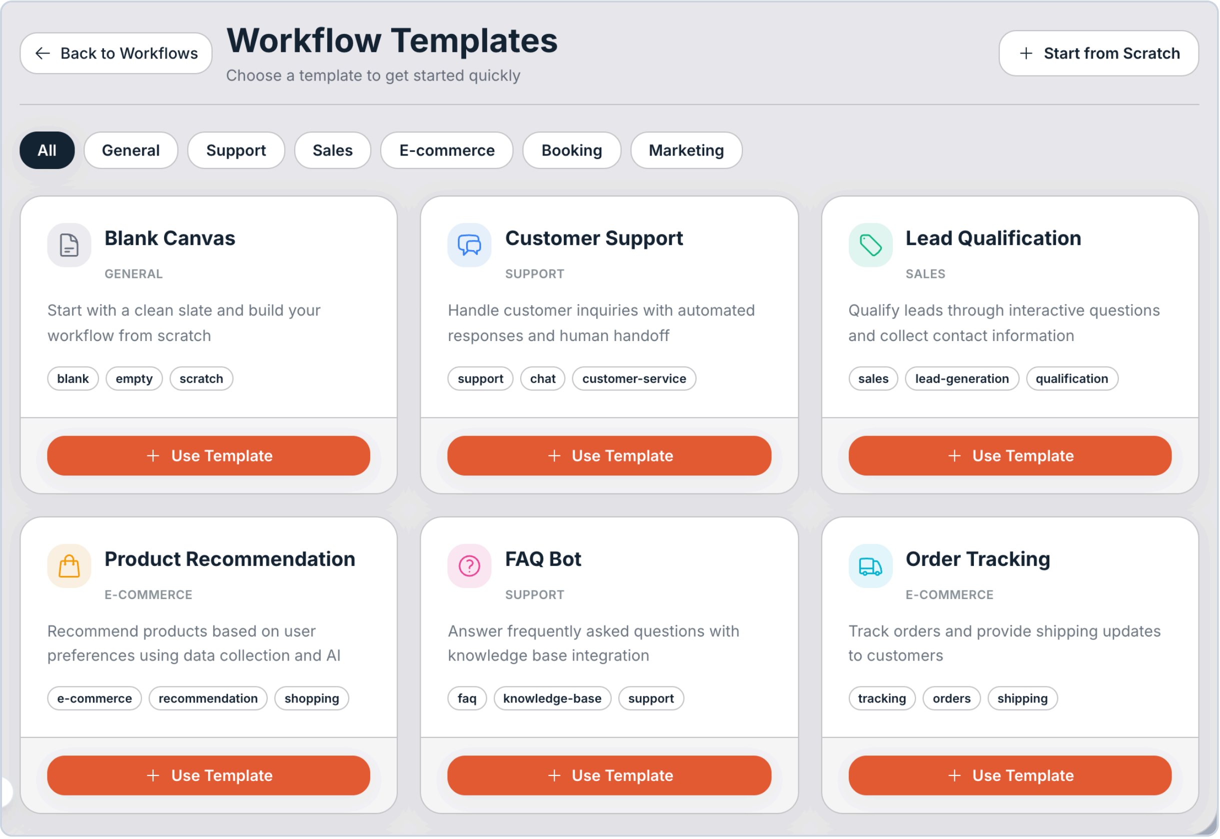
The list shows production workflows with a count of each, plus **test drafts** nested under their production parent. **Show only items with test drafts** filters to work in progress.

Creating one

New Workflow opens **Create New Workflow** — *Choose how you'd like to get started*:

- **Start from Scratch** — *Build a custom workflow tailored to your specific needs with complete control.*
- **Choose a Template** — *Select from pre-built workflow templates to get started quickly.*

Templates



Workflow templates.

Filterable by category: **All**, **General**, **Support**, **Sales**, **E-commerce**, **Booking**, **Marketing**.

Template	Category
Blank Canvas	General
Customer Support	Support
FAQ Bot	Support
Feedback Collection	Support
Technical Support	Support
Welcome & Routing	Support
Out of Office	Support
Lead Qualification	Sales
Product Inquiry	Sales
Product Recommendation	E-commerce
Order Tracking	E-commerce
Newsletter Signup	Marketing
User Onboarding	Marketing

Starting from a template and deleting what you do not need is consistently faster than building from **Blank Canvas**.

The builder

Drag nodes from the **Components** panel onto the canvas and connect them. **Show Advanced Components** reveals the rest; advanced nodes are marked **PRO**.

Categories are **Core Flow Control**, **Communication**, **AI & Processing**, **Data & Storage**, **Integration & APIs**, **Advanced Features**, **Analytics & Tracking**, **Security & Validation**, **Custom & Extensions**, and **Industry Solutions**.

The nodes you will use most:

Node	What it does
Start	Workflow entry point
End	Workflow termination point
Message	Send text messages
Button Message	Messages with action buttons
Image Message	Send images
Condition	Branch based on conditions
LLM Process	AI-powered responses
Local Data Call	Query data from data collections
API Call	Make HTTP requests
Shopify	Shopify store integration
Human Handoff	Transfer to human agent

Advanced nodes include **Switch** (multiple condition branches), **Loop** (repeat actions), **Carousel** (display multiple items), **Video Message**, **Form Message** (collect user input), **Webhook** (trigger external services), **Email**, **Schedule**, and **JavaScript**.

Human Handoff is the node most workflows are missing. Without it, a conversation the AI cannot resolve has nowhere to go. It hands the conversation to a person with the full transcript attached — see Support.

Execution modes

Two toggles in the builder header:

- **Agentic** or **Graph**. Graph follows your node connections strictly. Agentic gives the model latitude within the flow.
- **Auto-start: On / Off** — whether the workflow begins on its own when a visitor opens the widget.

Saving, publishing, activating

Button	What it does
Save	Saves the current workflow. On a new workflow the button reads **Create**.
Publish	Promotes the current state to production
Activate / Deactivate	Whether this workflow runs for live traffic
Run	Tests the workflow in place
New	Starts a fresh workflow

Status pills show whether you are looking at a **Test Draft** or **Production**, and whether it is **Active** or **Inactive**.

Save, publish, and activate are three separate steps. A saved workflow that is published but not activated will not run. If a workflow appears to be ignored, check all three, and then check that the widget's **Edit** dialog actually has that workflow selected in the **Workflow** field.

Test drafts

Saving a test workflow from the builder creates a test draft under its production parent. From the list you can **Edit** it, **Promote** it to production, or discard it. This is the safe way to change a workflow serving live traffic.

Chat and voice together

Setting **Link to Chat Widget** on a call widget enables voice calling inside your web chatbot — a visitor can escalate from typing to talking without leaving the page. That field is on the call widget, not the chat widget: see AI Calls.

Languages

Chat supports **50+ languages**. This is a different figure from the **16 voice languages** available to call widgets, and the two lists are not the same. Do not assume a language available in chat is available in voice, or the reverse.

Troubleshooting

Symptom	Usual cause
Widget does not appear on the site	The host is not in **Allowed Domains**. `www.` and bare domains are separate entries.
Widget appears but answers generically	No knowledge base attached, or it is empty. Check **Knowledge → Overview** for document counts.
Appearance changes not visible to visitors	You saved but did not **Publish**.
Theme reverts when switching themes	You switched with unsaved edits and chose **Discard & Switch**.
Workflow is ignored	Not activated, not published, or not selected in the widget's **Edit** dialog.
Workflow gets stuck	No path to an **End** node, or a **Condition** with no matching branch.
Conversation with an unhappy visitor dead-ends	The workflow has no **Human Handoff** node.
Editing a test widget changed the live one	The knowledge base is shared by reference, not cloned. Only the workflow is cloned.
Cannot see the Chat section	Your role is agent or supervisor.

Related

- Chat quick start
- Knowledge — what the widget answers from
- Support — where handed-over conversations land
- Data — visitor tracking, data collections, calendars
- Insights — **Widget Analytics**, **Survey Responses**
- FloGPT for Shopify — the storefront widget and Shopify tools

COMPLETE MANUAL · SECTION 7

Knowledge

Feed your agents your own content so answers come from your business, not guesswork.

Dashboard sidebar: Knowledge

Who can see this: Hidden from agents and supervisors.

Complete reference for the **Knowledge** section — knowledge bases, documents, sources, the web crawler, and retrieval settings.

Hidden from agents and supervisors.

For the fast path, use the Quick Start.

Section map

Sidebar page	Path	What it is
Overview	`/knowledge-base/overview`	Knowledge bases, their state, and embedding controls
Documents	`/knowledge-base/documents`	Individual documents, uploaded or hand-written
Sources	`/knowledge-base/sources`	Recurring feeds that keep content fresh
Web Crawler	`/knowledge-base/crawler`	One-off crawls and their job history
Settings	`/knowledge-base/settings`	Per-knowledge-base chunking and retrieval

`/knowledge-base` redirects to `/knowledge-base/overview`. **Add Knowledge Base** is available from every tab.

Roles

Action	Required role
Viewing the section in the sidebar	Everyone except **agent** and **supervisor**
Creating and editing knowledge bases, adding and editing documents, uploading, syncing, generating embeddings	**Owner**, **admin**, or **editor**
Deleting a knowledge base	**Owner** or **admin**

Two things follow from this. **Editors can build but not delete** — a useful split, since deleting a knowledge base also removes every document and source under it. And the section is hidden from the sidebar for agents and supervisors rather than blocked at the route, so someone who knows the URL can still open the page; the mutations themselves are enforced on the server, which is where it matters.

How retrieval works

Content goes through four stages, and knowing them explains almost every problem in this section.

Stage	What happens
Ingestion	A crawl, an upload, a source sync, or a manual entry produces a document
Chunking	The document is split into passages sized by **Chunk Size**, overlapping by **Chunk Overlap**
Embedding	Each chunk becomes a vector — this is the step you trigger explicitly
Retrieval	At answer time the closest chunks are fetched and cited

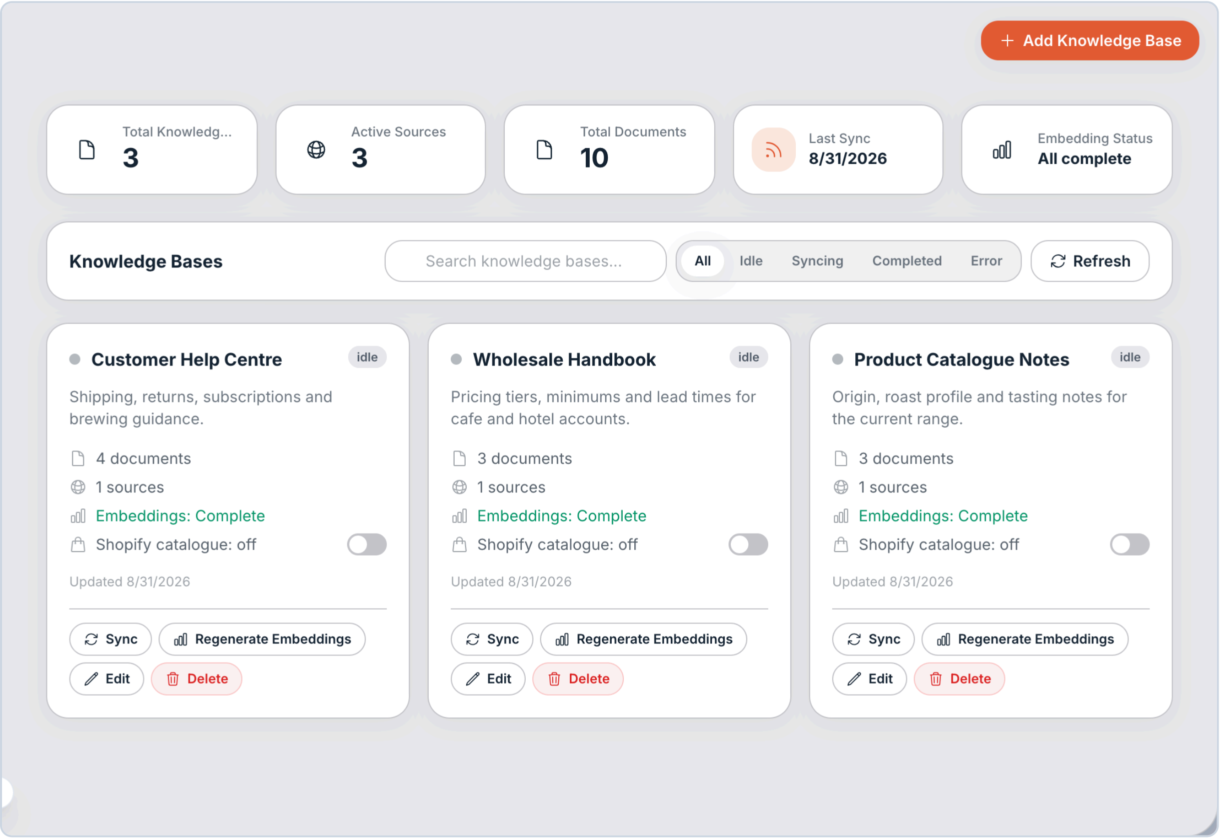
The critical implication: **a document is invisible until it has been embedded.** Ingestion and embedding are separate, and the second is manual unless **Auto-update** is on. This is the cause of most "the AI ignores my content" reports.

Chunk size is a genuine trade-off. Small chunks retrieve precisely but can lose the context around a fact; large chunks keep context but dilute the match. The defaults are reasonable — change them only when you have a specific failure to fix.

One knowledge base or several

A widget or call agent attaches to **exactly one** knowledge base. Split only when the content should not mix — separate brands, or public versus internal material. Splitting content that belongs together means one widget can no longer answer questions that span both halves.

Overview



Knowledge → Overview.

Tiles

Tile	What it shows
Total Knowledge Bases	Count
Active Sources	Sources across all knowledge bases
Total Documents	Documents across all knowledge bases
Last Sync	Most recent update
Embedding Status	A rollup — **All complete**, **Not generated**, **{n} need update**, **{n}/{total} complete**, or **N/A**

Creating and editing

Add Knowledge Base opens **Create Knowledge Base** with a **Name** (required) and a **Description**.

Edit Knowledge Base adds one control that is easy to miss:

Website crawling — *Allow website sources to be crawled and embedded. When off, sync skips website sources.*

With it off, **Sync** is disabled on the card and the tooltip explains why: *Website crawling is disabled for this knowledge base. Enable it in Edit to sync website sources.* Uploaded documents are unaffected.

Deleting warns: *Are you sure you want to delete this knowledge base? This action cannot be undone. All associated documents and sources will also be removed.*

Filters

A search box (*Search knowledge bases...*), a status filter (**all**, **idle**, **syncing**, **completed**, **error**), and **Refresh**. Empty: **No knowledge bases found** — *Create your first knowledge base to get started.*

While anything is syncing the page refreshes itself every 10 seconds, so you can watch progress without reloading.

Reading a card

Each card shows the name, a status pill, document and source counts, **Embeddings:** with its state, the **Shopify catalogue** row, and when it was last updated.

Embedding status

State	Button	Meaning
No Documents	**Generate Embeddings**	Nothing to embed; the button is disabled
Not Generated	**Generate Embeddings**	Content has never been embedded
Needs Update	**Update Embeddings**	A document was created or edited after the last run
Complete	**Regenerate Embeddings**	Up to date

Needs Update is highlighted in amber because it is the state that quietly breaks answers. It appears the moment any document's created or updated timestamp is newer than the last embedding run — so it will appear after every edit, upload, and completed crawl.

On success: *Embeddings generated successfully! {n} documents processed in {n}s.*

Set **Auto-update sources and embeddings** in **Settings** to have this happen without you.

Card actions

Action	Notes
Sync	Re-crawls website sources. Disabled when **Website crawling** is off
Embeddings button	Per the table above
Sync Catalogue	Appears only when the Shopify catalogue toggle is on
Edit	Name, description, website crawling
Delete	Removes the knowledge base, its documents, and its sources

The Shopify catalogue

Each card has a **Shopify catalogue** toggle — *Embed the Shopify product catalogue into this knowledge base. Requires a connected Shopify store.*

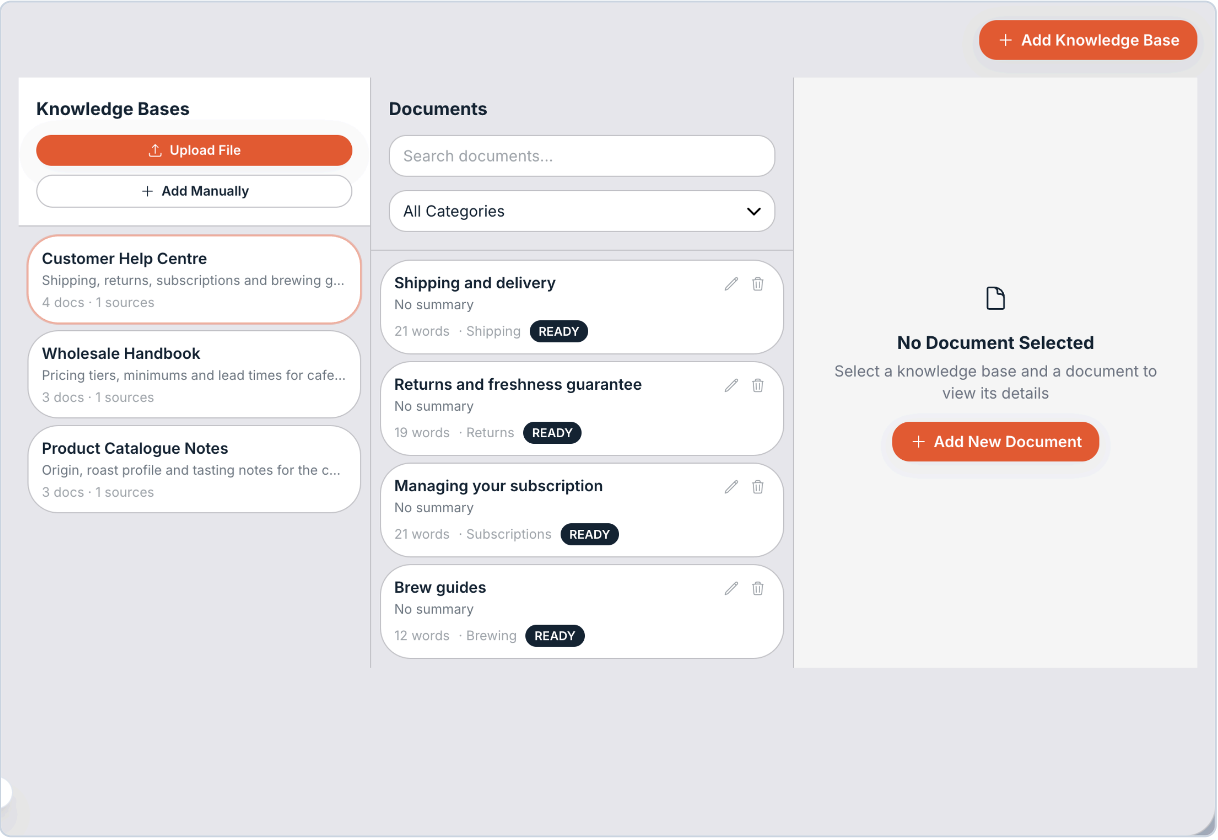
The row reads **off**, **syncing...**, **error**, or a product count. Switching it on starts embedding immediately (*Product catalogue enabled — embedding started*), and a **Sync Catalogue** button appears for manual refreshes.

This is what lets the AI answer product questions — specifications, variants, availability — during a chat or a call, without you writing any of it down.

If the FloGPT Shopify app has been uninstalled, the knowledge base moves to a deactivated state and every sync control is locked with the explanation: *The floGPT Shopify app has been uninstalled from this store. Reinstall it to re-enable syncing.*

See Integrations and FloGPT for Shopify.

Documents



Knowledge → Documents.

Three panes: knowledge bases, their documents, and the selected document.

Adding content

Control	Behaviour
Upload File	Opens a file picker
Add Manually	Opens **Add New Document**

Supported uploads are PDF, Word `.docx`, and any plain-text format (`.txt`, `.md`, `.csv` and similar). Legacy `.doc` is **not** supported — resave as `.docx`.

There is no type filter on the picker and no enforced size cap, and — importantly — **an unsupported file does not fail loudly.** Anything the parser does not recognise is read as raw UTF-8, so a binary format lands as gibberish or as an empty document while the upload still reports success. Open the document after uploading an unusual format and confirm the **Content** looks like prose. Gibberish that reaches the embedding stage degrades retrieval across the whole knowledge base, so delete it rather than leaving it in place.

Add New Document takes:

Field	Notes
Title *	Required
Summary	Optional; prepended to the content
Content *	Required, with a live character count
Tags	*Separate tags with commas*
Author	Optional

Writing a short manual document is the fastest way to fix a wrong or missing answer — much faster than editing a source page and re-crawling.

Browsing

A search box (*Search documents...*) matches title, summary, and tags, and a category filter offers **All Categories** plus whatever categories exist on your documents.

The list shows **5 documents at a time** with a **Load more ({n} remaining)** control, ending in *All {n} documents*. With a large knowledge base, search rather than scroll.

Each row shows the title, the summary (or **No summary**), a word count, its category, and a status pill.

Viewing and editing

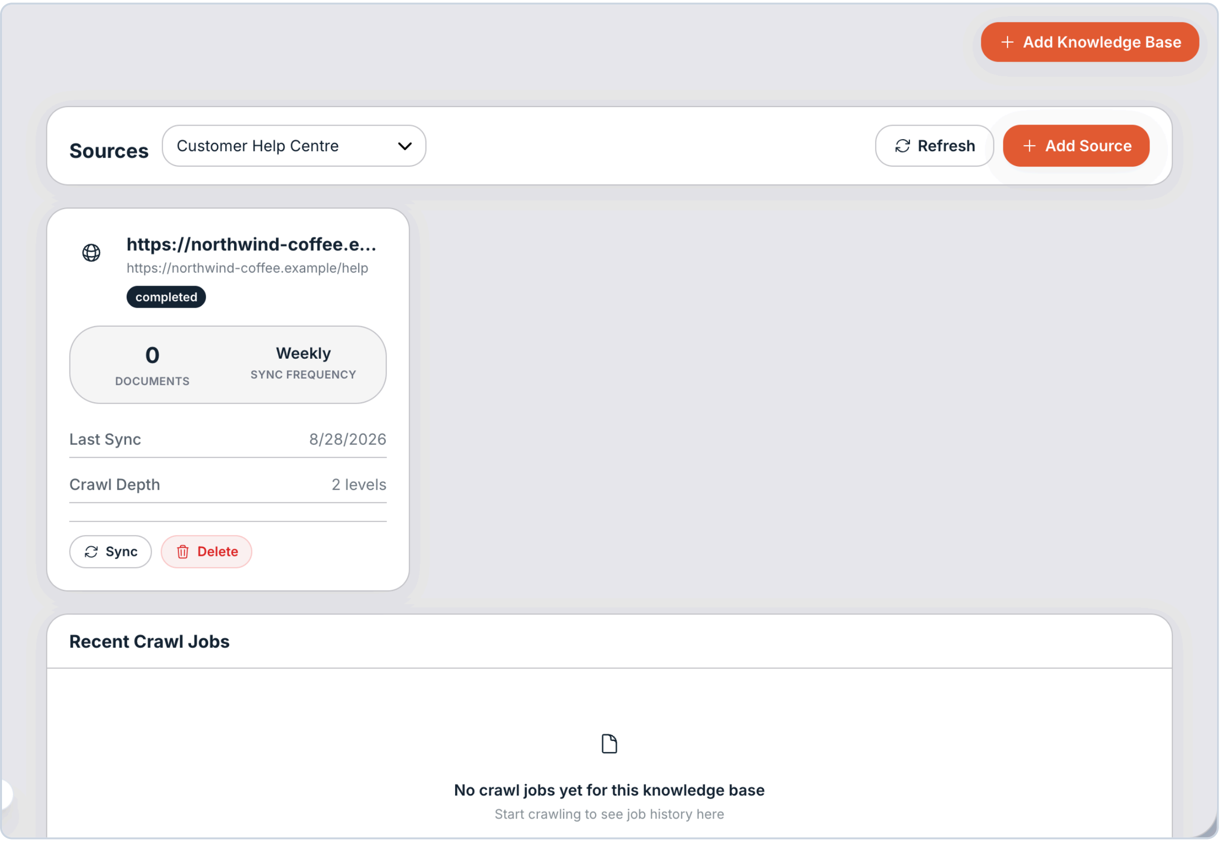
The detail pane shows the title, status, **Type**, **Summary**, **Content**, and a metadata row of **Language**, **Word Count**, **Reading Time**, and **Category**, followed by **Tags** and **Author**.

Edit Document — *Update document details and content* — allows **Title**, **Summary**, **Content**, **Tags**, and **Author**. **Category is read-only**: it is derived rather than set by hand.

Empty states: **No Document Selected** — *Select a knowledge base and a document to view its details*; and *No documents for this knowledge base.*

Editing a document flips its knowledge base to **Needs Update**. Re-embed when you are done with a batch of edits rather than after each one.

Sources



Knowledge → Sources.

A **source** is a recurring feed, as opposed to the one-off crawls on the Web Crawler tab. Pick a knowledge base first — *Choose a knowledge base to view and manage its sources.*

Adding a source

Add New Source:

Field	Options
Type	**Website**, **Sitemap**, **RSS Feed**, **API Endpoint**
Name	*Source name*
URL	`example.com` or the full address
Sync Frequency	**Manual**, **Daily**, **Weekly**, **Monthly** — defaults to **Daily**

Sitemap is usually a better choice than **Website** for a site of any size: it enumerates pages directly instead of relying on link discovery, so nothing orphaned gets missed.

Source cards

Each card shows the URL, a sync status pill (**idle**, **syncing**, **completed**, **error**) with a live percentage while running, and:

Field	Meaning
Documents	Documents attributed to this source
Sync Frequency	As configured
Last Sync	Date of the most recent run
Crawl Depth	How many levels deep it follows, shown as *{n} levels*

A source is added with a **Crawl Depth of 3** and there is no field for it on this page, so a site that buries content deeper than three clicks needs a one-off crawl from the **Web Crawler** tab, where **Max Depth** goes to 10.

Actions are **Sync** and **Delete**. While anything is syncing the page refreshes every 10 seconds.

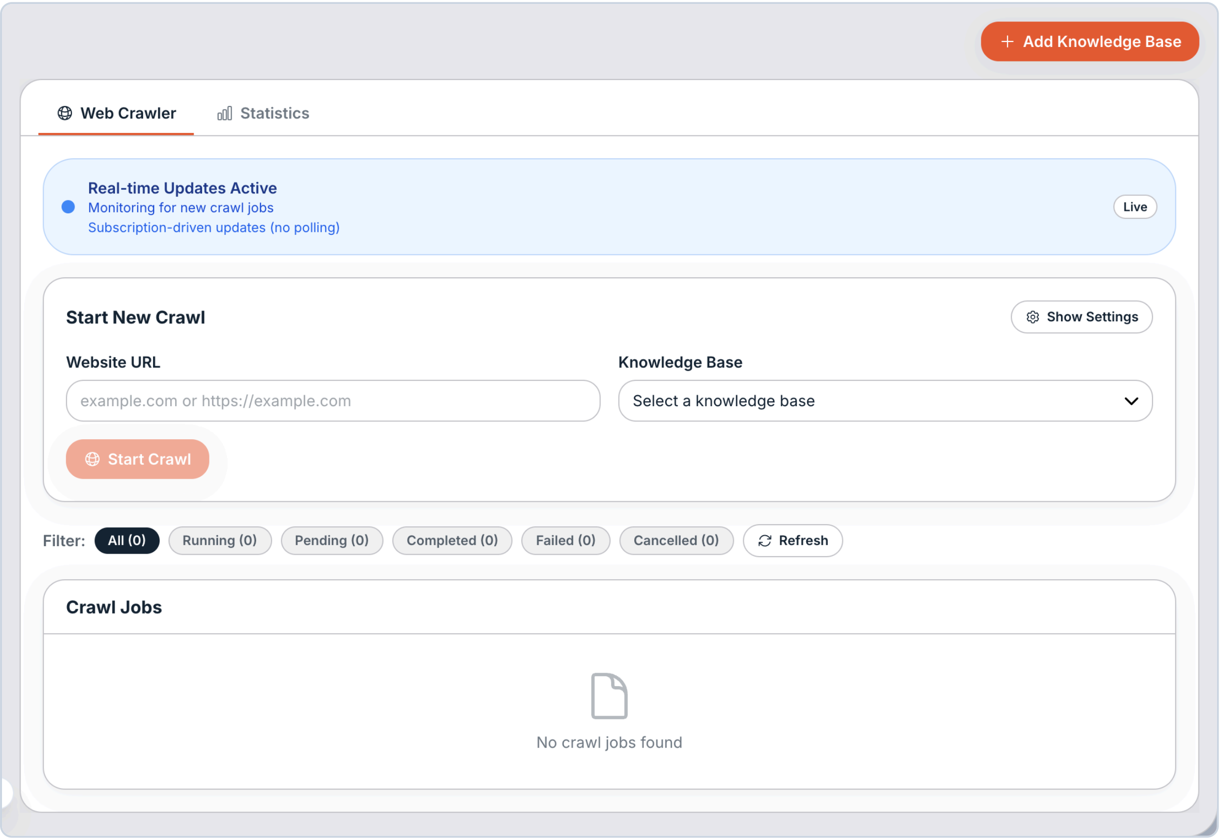
Empty: **No sources found** — *Add your first source to start building your knowledge base*, with **Add Your First Source**.

Recent Crawl Jobs

Below the cards, the five most recent crawl jobs for this knowledge base, each with its URL, status, *{n} pages processed*, a percentage while running, and *Duration*. Empty: **No crawl jobs yet for this knowledge base** — *Start crawling to see job history here.*

For full job history, filters, and per-job details, use the **Web Crawler** tab.

Web Crawler



Knowledge → Web Crawler.

Two tabs: **Web Crawler** and **Statistics**.

A banner at the top reports the live connection — **Real-time Updates Active** with a **Live** pill, or **Real-time Updates Disconnected** with **Offline** — and notes *Subscription-driven updates (no polling)*. If it goes offline you get *Real-time updates temporarily unavailable*; jobs keep running, but you will need **Refresh** to see progress.

Starting a crawl

Field	Notes
Website URL	*example.com or https://example.com*
Knowledge Base	Required

Both are required — *Please enter a URL and select a knowledge base.* An unparseable address gives *Please enter a valid URL (e.g., example.com or https://example.com).*

Show Settings reveals:

Setting	Default	Range
Max Depth	5	1–10
Max Pages	100	1–1000
Delay (ms)	1000	0–10000
Chunk Size	1000	100–5000
Respect robots.txt	on	
Follow external links	off	

Delay (ms) is politeness — the pause between requests. Lowering it on your own site is usually fine; lowering it against a site you do not control is not.

Follow external links is off deliberately. Turning it on means the crawler can wander onto sites you do not own and embed their content into your knowledge base, which is both a quality and a licensing problem.

> **Chunk Size here is not the same field as Chunk Size in Settings.** This one applies to the crawl and accepts 100–5000; the one on the Settings tab governs the knowledge base and accepts 0–800. They are separate values with different limits — a source of real confusion.

What the crawler will not read

The crawler follows HTML pages and **skips URLs ending in `.pdf`, `.doc`, `.docx`, `.xls`, `.xlsx`, `.ppt`, `.pptx`**, archives, executables, images, and stylesheets.

So a policy document or price list published as a PDF on your website **will not be picked up by a crawl**, no matter how prominently it is linked. Upload those on the **Documents** tab. This is the most common reason a crawl "misses" important content.

Jobs

Filter by **all**, **running**, **pending**, **completed**, **failed**, **cancelled**, each with a count, plus **Refresh**.

A running job shows a progress bar, **{n}% Complete**, and **{processed} / {found} pages**, with **Stop**. Finished jobs show final progress and can be deleted — **Delete** appears only once a job is no longer running, so stop a runaway crawl first.

Show Details exposes **Job ID**, **Created By**, **Knowledge Base**, **Progress**, **Pages Found**, **Pages Processed**, and the raw **Configuration**. Quote the **Job ID** when reporting a problem.

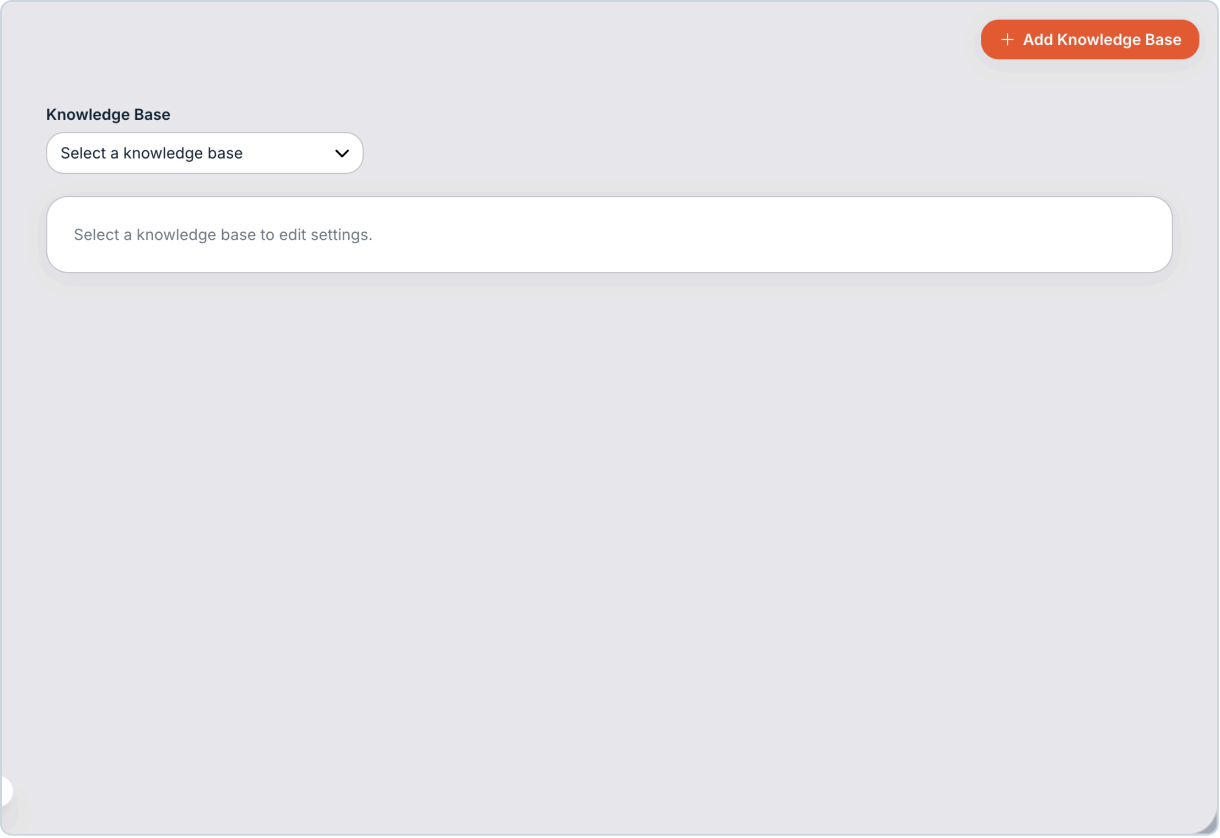
Completion and failure are announced: *Crawl job completed! Processed {n} pages.* and *Crawl job failed for {url}.*

Empty: **No crawl jobs found**.

Statistics

Tiles for **Total Jobs**, **Running**, **Completed**, **Failed**, **Pending**, **Cancelled**, and a **Status Distribution** breakdown with counts and percentages. Useful for spotting a source that fails consistently.

Settings



Knowledge → Settings.

Per knowledge base — pick one first (*Select a knowledge base to edit settings.*).

Setting	Default	Range
Chunk Size	800	0–800
Chunk Overlap	100	0–100
Language	English	English, Spanish, French, German, Italian, Portuguese, Hindi, Japanese
Auto-update sources and embeddings	on	

Both numeric fields **default to their maximum**, which is the right starting point — reduce them only to fix a specific retrieval problem, and re-embed afterwards so the change takes effect.

Validation is explicit: *Chunk size must be between 0 and 800.* and *Chunk overlap must be between 0 and 100.*

Auto-update sources and embeddings is the setting worth leaving on. With it off, every document change leaves the knowledge base in **Needs Update** until someone notices.

Language is a hint for processing, not a restriction on what your widget can answer in — Chat supports 50+ languages regardless.

Save Settings commits.

Troubleshooting

Symptom	Usual cause
The AI ignores content that is clearly there	Embeddings not generated — check for **Not Generated** or **Needs Update**
Answers were right, then went stale	A document changed and was never re-embedded; turn on **Auto-update**
A crawl finished with far fewer pages than expected	**Max Pages** or **Max Depth** hit, `robots.txt` disallowing, or orphaned pages — try a **Sitemap** source
A PDF on my website is never cited	The crawler skips document URLs; upload it on the **Documents** tab
An uploaded document contains gibberish	Unsupported formats are read as raw text and still report success — delete it and resave as `.docx` or PDF
A `.doc` upload appears to work but answers nothing	Only `.docx` is supported; the old format parses to garbage rather than erroring
A source misses pages deeper in the site	Sources are fixed at a crawl depth of 3 — run a one-off crawl with a higher **Max Depth**
Delete is missing on a knowledge base	Deleting needs owner or admin; editors can create and edit only
Sync is greyed out on a card	**Website crawling** is off in **Edit**
Every Shopify sync control is locked	The FloGPT Shopify app was uninstalled; reinstall it
Shopify catalogue shows **error**	Hover the row for the sync error
Cannot delete a crawl job	It is still running — **Stop** it first
Crawl progress appears frozen	The real-time connection dropped; press **Refresh**
Chunk Size will not accept 1000 on the Settings tab	That field caps at 800; the 100–5000 field is on the Web Crawler tab

Symptom	Usual cause
Category cannot be edited on a document	It is derived and read-only by design
Documents list seems to hold only five	It pages five at a time — use **Load more** or search
A widget answers from general knowledge	No knowledge base is attached to it — check the widget's **Edit** dialog

Related

- Knowledge quick start
- Chat — attaching a knowledge base to a widget
- AI Calls — attaching one to a voice agent
- Integrations — connecting a Shopify store
- Start here — where knowledge fits in first-run setup
- FloGPT for Shopify — catalogue embedding

COMPLETE MANUAL · SECTION 8

Support

The human side: live chat inbox, tickets, contacts, call takeover, CRM analytics, and the Users section's team management.

Dashboard sidebar: Support

Who can see this: Support is visible to every role, with the analytics and settings entries owner or admin only. The Users pages it documents sit in their own owner-and-admin section, and Permissions within it is owner-only.

Complete reference for the **Support** section — the live chat inbox, outsourced staffing, live-call takeover, the CRM (tickets and contacts), support analytics, and per-channel ticket rules. It also covers team management and member permissions, which sit in their own **Users** section of the sidebar.

Every role sees this section, but which pages and which controls differ substantially by role. See Roles and permissions.

For the fast path, use the Quick Start.

Section map

Sidebar page	Path	What it is
Support Chat	`/support-chats`	Live inbox for conversations handed over by the AI
Managed Support	`/managed-support`	Outsourced human agents and supervisors, staffed by FloGPT
Live Calls	`/support/live-calls`	Monitor and take over in-progress AI calls
Tickets	`/crm/tickets`	The ticket queue
Contacts	`/crm/contacts`	Customer records and their identifiers
My Analytics	`/crm/analytics/self`	Your own ticket analytics
Agent Analytics	`/crm/analytics/agent`	Per-agent CRM analytics
Supervisor Analytics	`/crm/analytics/supervisor`	Org-wide analytics with a leaderboard
Settings	`/crm/settings`	Which channels create tickets

`/support-tickets` redirects to `/crm/tickets`.

The people pages are no longer here. **Admins** (`/admins`), **Agents** (`/agents`), and **Supervisors** (`/supervisors`) live in the **Users** section of the sidebar, alongside **Permissions** (`/users/permissions`), and are documented under Team management and Member permissions below.

Roles and permissions

The roles are **owner**, **admin**, **supervisor**, and **agent**. **Editor** and **viewer** exist in the underlying data model and in the 2FA policy's role list, but no invite or create flow can assign either one, so no member holds them.

Page	Who sees it
Support Chat, **Live Calls**, **Tickets**, **Contacts**, **My Analytics**	Everyone
Managed Support	Owner or admin
Agent Analytics	Supervisor or owner
Supervisor Analytics, **Settings**	Owner

The **Users** section is visible to owners and admins only. Within it, **Admins** is open to both, while **Agents** and **Supervisors** are owner-only — so an admin sees a Users section containing just **Admins**.

These are the defaults. An owner can narrow them per role on the **Users → Permissions** page, documented under Member permissions below, which can only take capabilities away, never add them. Two entries there bear on this section: revoking *View team members* removes the **Users** section entirely for that role, and revoking *Invite and deactivate team members* leaves the lists readable without the invite, create, and deactivate controls. A third, *See the whole lead book*, scopes a role to leads assigned to them plus the open pool — the same restriction agents have by default.

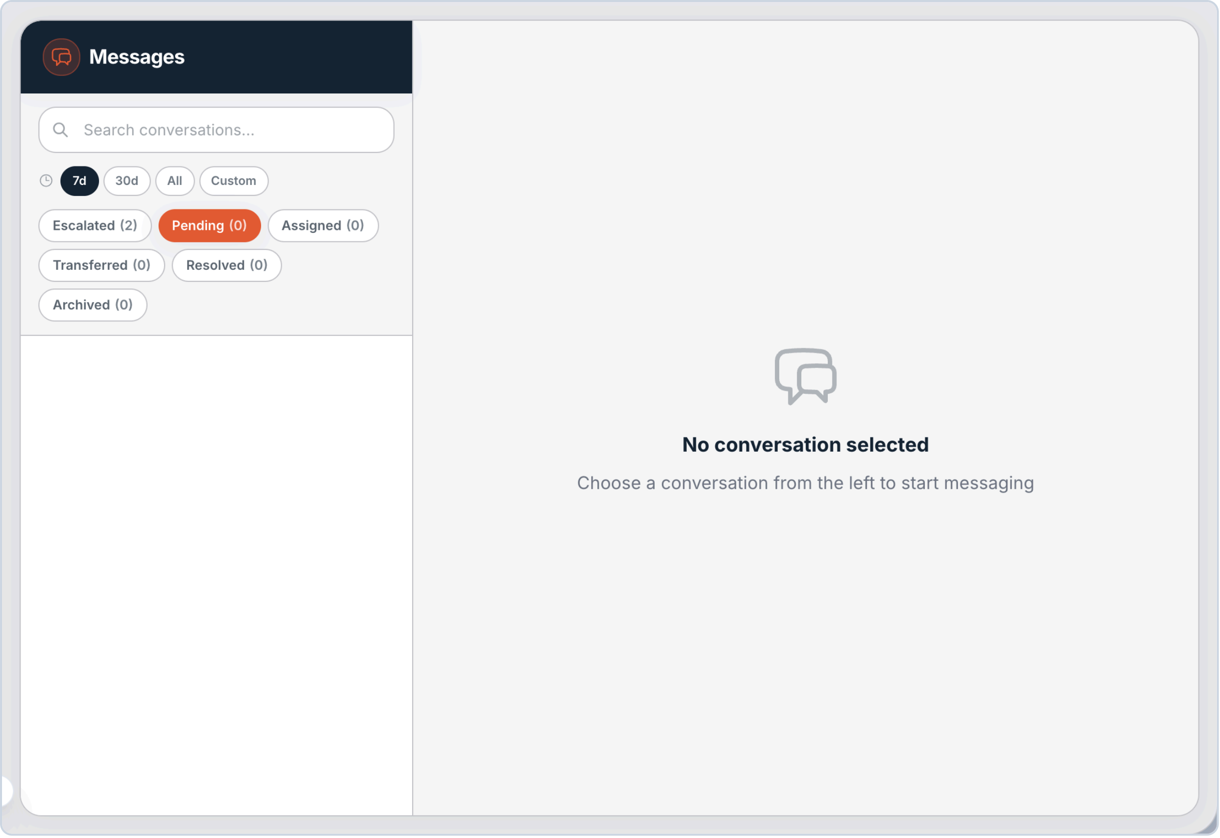
Within the CRM, owner, admin, and supervisor are treated as **privileged** and unlock:

- The agent filter on Tickets and the bulk-actions bar
- Reassigning a ticket to someone else
- Editing tags
- Creating a contact

Agents are scoped to their own work. An agent can only edit a ticket assigned to them — an unassigned ticket is read-only until claimed, and a colleague's ticket shows *Only the assigned agent can edit this ticket.*

> One inconsistency worth knowing: **Settings** is only listed for owners, though the page is readable more widely and editable by owners and admins.

Support Chat



The Support Chat inbox.

The live inbox. Left panel is titled **Messages**.

How a conversation gets here

A widget conversation is handed over when the visitor asks for a person — the AI watches for phrasing like *human agent* and *escalate* — or when a workflow reaches a **Human Handoff** node (see Chat). A support request is created with status **pending** and appears in this list.

If no agent is available, the bot tells the visitor so: *Our support agents are currently unavailable. Your request is pending. The nearest available time to connect is {time}.* The request is **not dropped** — it waits. Availability comes from **Support Agent Business Hours** in Setup, so an over-restrictive schedule is the usual cause of requests sitting untouched.

Conversations can also be flagged **Escalated** automatically by the idle-time rules in Setup → Escalation.

Filters

Control	Options
Search	*Search conversations...*
Date range	**7d**, **30d**, **All**, **Custom** (with **From** / **To**)
Status	**Escalated**, **Pending**, **Assigned**, **Transferred**, **Resolved**, **Archived**, each with a live count

The conversation list

A row is titled **User · Ticket #{number}** when a ticket exists, otherwise by visitor name or **User**. Unread counts, platform icons, and pills for **Escalated**, **Transferred**, **Assigned**, **Resolved**, and priority appear inline.

Action	When it appears
Assign me	Unclaimed conversations
Connect	A conversation transferred to you that you have not yet joined
Archive	On resolved rows, via the row menu

Working a conversation

Selecting nothing shows **No conversation selected** — *Choose a conversation from the left to start messaging.*

The transcript shows the whole history, with a **Support Handoff · {date}** separator marking where the AI stopped and the human part begins. Read the AI's last turns first — the customer has already explained the problem once, and repeating the questions is the fastest way to annoy them.

The composer reads *Reply to customer...* with the hint *Press Enter to send, Shift+Enter for a new line*. On a resolved chat it is disabled: *Resolved chat cannot receive new messages.*

The action bar offers:

Control	Behaviour
Create CRM Ticket / **Open CRM Ticket**	*Picks up the visitor as contact (or creates one) and files a general ticket linked to this chat.* Takes a **Priority** (**Low**, **Medium**, **High**, **Urgent**) and an optional subject
Resolve	Opens **Resolve Chat** with optional remarks
Assignment menu	**Resolve Conversation**, **Transfer Conversation**, **Assign to Me**

The transfer list is searchable and grouped into **Agents ({n})** and **Supervisors ({n})**.

Managed Support

Owner or admin. This page is not an inbox — it is how you buy human staffing.

Managed Customer Support — *Add trained human agents and supervisors to your team — hired, managed, and staffed by us. Available worldwide.*

Two seat types, priced per month:

Seat	Does
Support Agent	*Handles live chat, tickets, and email in your support inbox.*
Supervisor	*Oversees your agents, quality, and escalations.*

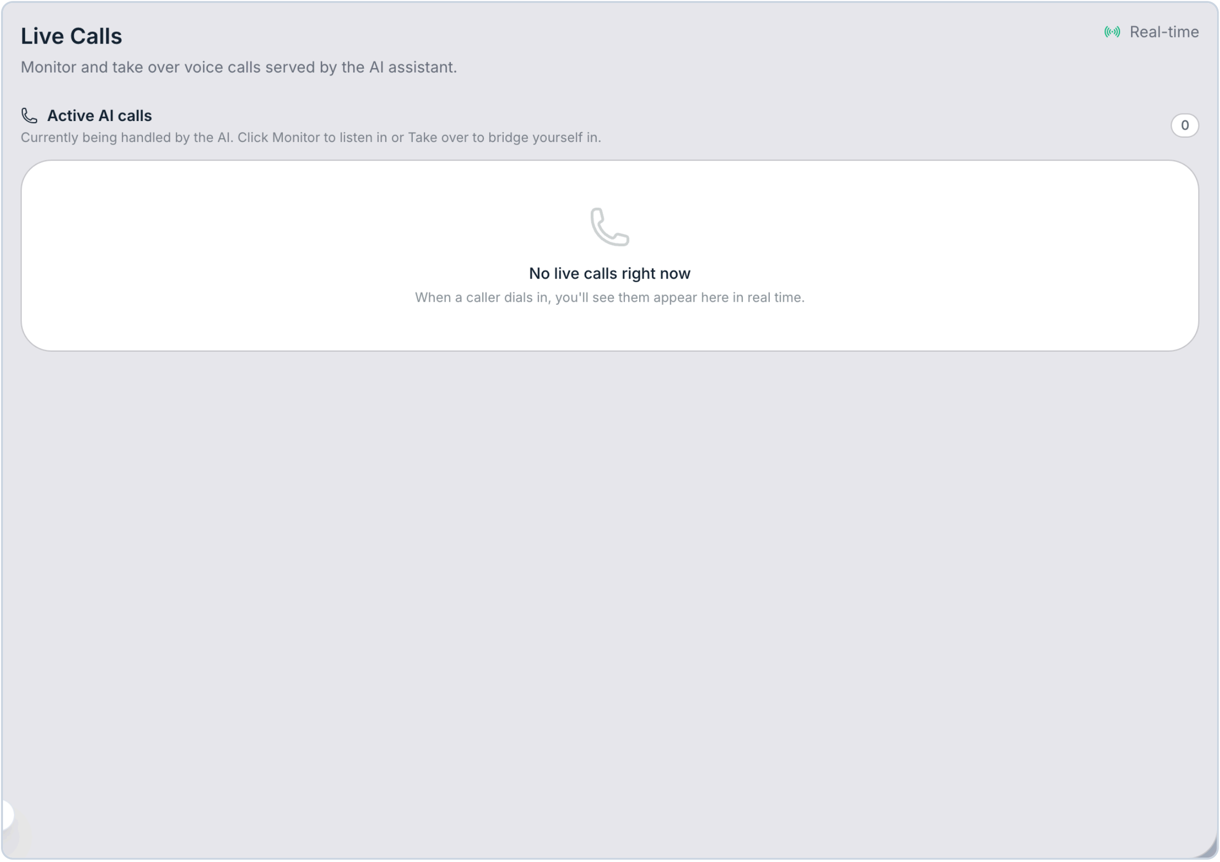
Your managed support shows the status (**Not requested**, **Awaiting payment**, **Active**, **Payment past due**, **Canceled**) with **Agent seats**, **Supervisor seats**, and **Assigned staff**.

The flow is: **Request managed support** → choose seat counts → pay → **schedule your kickoff meeting** (a date and time, plus optional context — *Support hours, tools, product areas, languages...*) → FloGPT assigns staff. Until the kickoff, *Staff will be assigned by our team after your kickoff meeting.*

Cancellation is at period end, and a scheduled cancellation can be reversed with **Keep subscription**.

Shopify-billed organizations must choose a Shopify plan first — *Choose a Shopify plan first.*

Live Calls



Live Calls.

Live Calls — *Monitor and take over voice calls served by the AI assistant.* Visible to every role, real-time.

Two groups:

Group	Meaning
Ringing now	*Caller waiting for a human agent. First click wins.*
Active AI calls	*Currently being handled by the AI. Click Monitor to listen in or Take over to bridge yourself in.*

Each card shows who controls the call (**AI** or an agent's name), the caller, the last turn, and for ringing calls a **Reason:**. The button reads **Pick up**, **Open**, or **Take over** depending on state.

Empty: **No live calls right now** — *When a caller dials in, you'll see them appear here in real time.*

Inside a call

Opening a call starts you listening, with a live transcript alongside **Sentiment:**, **Summary:**, and **Known caller:**. Turns are tagged **Caller** or **AI**, and marked **interrupted** where the caller cut in. Before the first turn: *Waiting for the conversation to start...*

Your microphone status shows **Mic live**, **Listening**, or **—**.

Control	Effect
Pick up	Answer a ringing caller
Take over	Bridge your microphone into an AI call
Release	Hand control back to the AI
Hang up / End call	Finish the call
Decline	Refuse a ringing call

Take over rather than calling back — the caller stays connected and you inherit the full context.

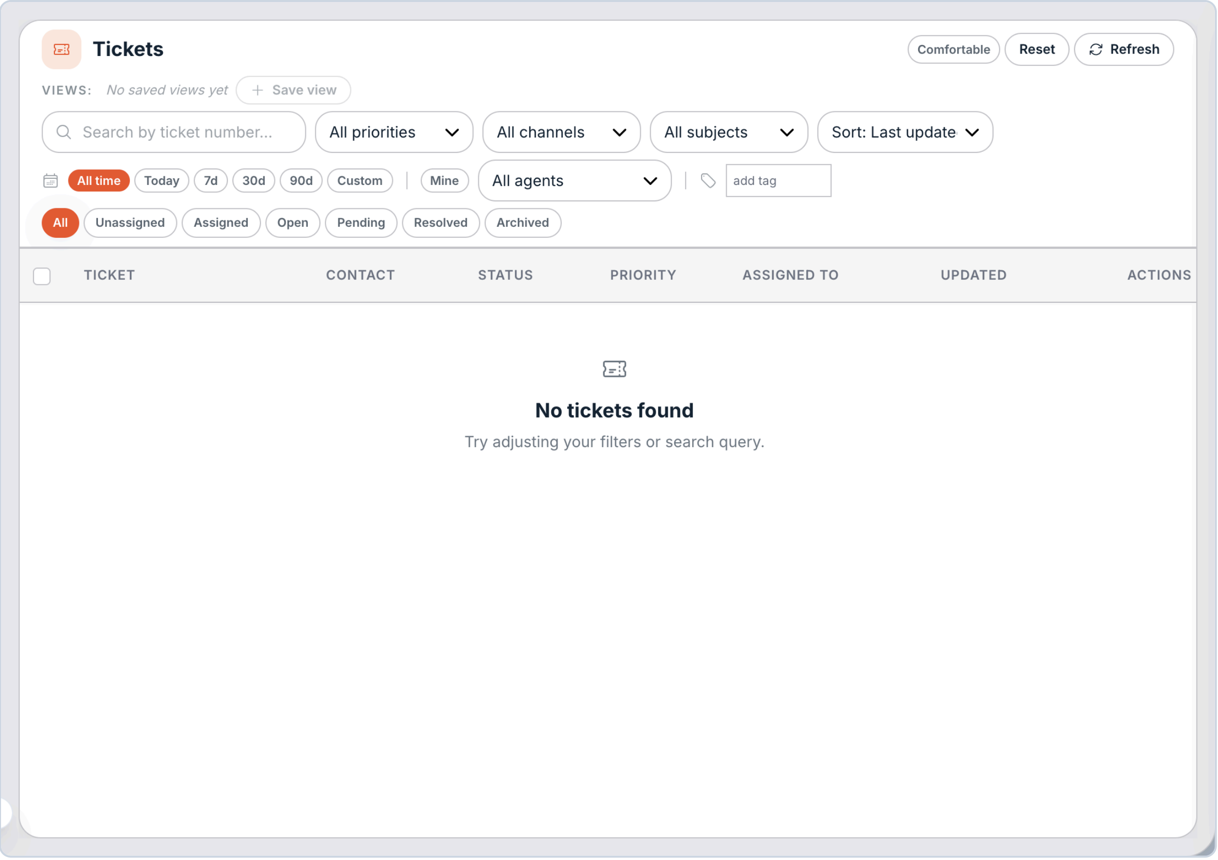
Control errors

These messages are precise and tell you exactly what happened:

Message	Meaning
Only the agent handling this call, or a supervisor, can end it.	You do not hold the call
Another agent already picked up this call.	Lost the race
This call has already ended.	Too late
Too many agents are already listening to this call.	Listener cap reached
Live audio for this call is unavailable right now. The transcript is still live.	Audio bridge unreachable — you can still read along

Ending an AI-held call is restricted to owners, admins, and supervisors.

Tickets



The ticket queue.

Ticket numbers

Every ticket gets `{ORG_PREFIX}-{six digits}` — for example `ACME-000042` — from a per-organization counter. The prefix is derived from your organization. Search accepts the ticket number directly: *Search by ticket number...*

Statuses, priorities, and channels

Set	Values
Status	`unassigned`, `assigned`, `open`, `pending`, `resolved`, `closed`
Priority	**Low**, **Medium**, **High**, **Urgent**
Source channel	**Chat**, **Call**, **Email**, **WhatsApp**, **Instagram**, **Facebook**, **SMS**, **Manual**
Subject	**Order**, **Product**, **Subscription**, **Service**, **General**

Archived is a separate flag rather than a status, which is why the pills read **All**, **Unassigned**, **Assigned**, **Open**, **Pending**, **Resolved**, **Archived**.

The list

Columns: **Ticket**, **Contact**, **Status**, **Priority**, **Assigned To**, **Updated**, **Actions**.

Two counts sit by the heading — tickets matching the current filters, and *All tickets in the org (incl. archived)*.

Filters: search, priority, channel, subject, a sort selector (**Last updated**, **Oldest update**, **Newly created**, **Oldest first**, **Last message**), and a time range (**All time**, **Today**, **7d**, **30d**, **90d**, **Custom**). Privileged roles also get a **Mine** toggle, an agent selector, and tag filtering.

A **Compact** / **Comfortable** density toggle and a **Reset** control sit in the header. Empty: **No tickets found** — *Try adjusting your filters or search query.*

Saved views let you pin the current filter set by name, optionally **Share with the entire organization** — though *Only you can edit or delete this view, even when shared.* This is the fastest way to give a team a shared definition of "my urgent queue".

Bulk actions

Privileged roles only — others see *Bulk actions are available to owner/admin/supervisor only.*

Assign..., **Set priority...**, **Add tag...**, **Archive**. Results report *Updated {n} of {total} tickets.* Selecting tickets not assigned to you when you lack permission warns *{n} ticket(s) not assigned to you — deselect to enable.*

The Manage drawer

Tabs: **Overview**, **Conversation**, **Notes & Activity**, **Contact**, **Internal**.

Overview holds **Assigned to**, **Priority**, **Status**, **Resolution summary**, and **Tags**. Assignment offers **Self assign** and **Assign agent** / **Reassign** with a searchable member list.

Status moves are explicit rather than a free dropdown:

From	Action
`assigned`	**Open ticket**
`open`	**Resolve** or **Put on hold**
`pending`	**Resume**
`resolved`	**Close ticket**

Resolve opens a dialog — *Add an optional summary — stored on the ticket and copied into the action history.* Write it. It is what the next person reads.

Contact shows the contact, their identifiers, linked external CRMs, and deep links (**Open chat**, **Open WhatsApp chat**, **Open call log**).

Internal is the raw record — every id and timestamp, including **Ticket ID**, **Conversation ID**, **Call Log ID**, **Email Thread ID**, and **Last Message Direction**. This is the tab to open when something needs escalating to support or debugging against the API.

Notes, replies, and file requests

The composer on **Notes & Activity** has three modes:

Mode	Behaviour
Internal note	Teammates only. Supports **@ Mention**
Reply to customer	Sends over **Email**, **SMS**, **WhatsApp**, **Instagram**, or **Facebook**
Request files	Sends a secure upload link

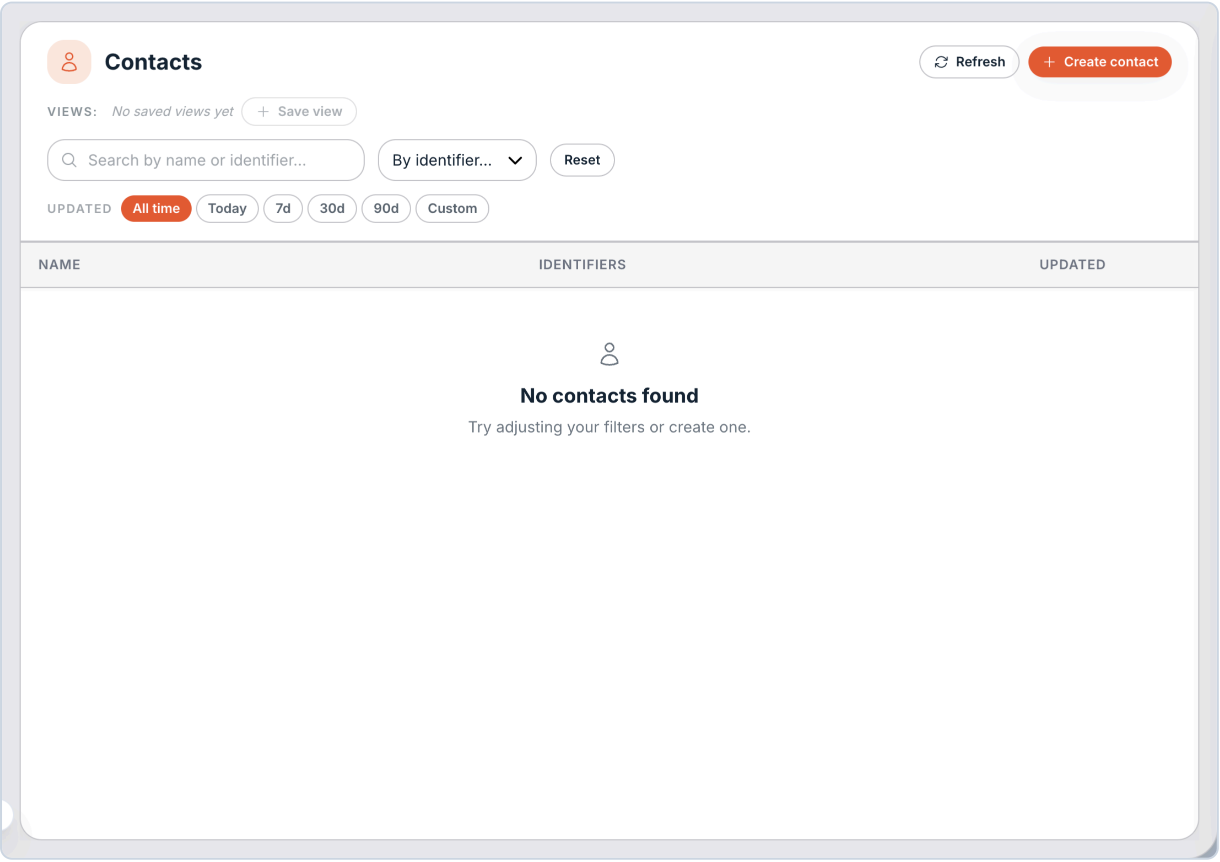
Reply channels are enabled per contact and per ticket. Where a channel is unavailable the tooltip says why — *Contact has no email on file*, *Contact has no phone on file*, *Contact has no WhatsApp/phone on file and ticket is not from WhatsApp*. Email replies default their subject to *Re: Ticket {n}*.

Request files sends a one-time secure link — *The customer receives a one-time secure link (valid 14 days) to upload files back to ticket {n}* — and uploads appear under **Attachments** pilled **from customer** or **by agent**. This is materially more reliable than asking for an email attachment, and the files land on the ticket rather than in someone's mailbox.

The activity feed filters to **All**, **Notes**, or **Activity**, and records every change: **Ticket created**, **Assigned**, **Reassigned**, **Status changed**, **Priority changed**, **Tags changed**, **Archived**, **Unarchived**, **Note added**, **Reply sent to customer**, **Reply to customer failed**, **Customer replied**, **Attachment request sent**, **Attachment uploaded**.

Reply to customer failed is the one to watch for — a reply that did not send leaves a trace here rather than failing silently.

Contacts



Contacts.

Columns: **Name**, **Identifiers**, **Updated**. Search by name or identifier, or filter **By identifier...** across **Email**, **Phone**, **WhatsApp**, **Instagram**, **Facebook**, **Visitor ID**. Nameless records show **Unnamed**.

Create contact is privileged. *A contact must have at least one identifier. Existing identifiers will merge into the matching contact.*

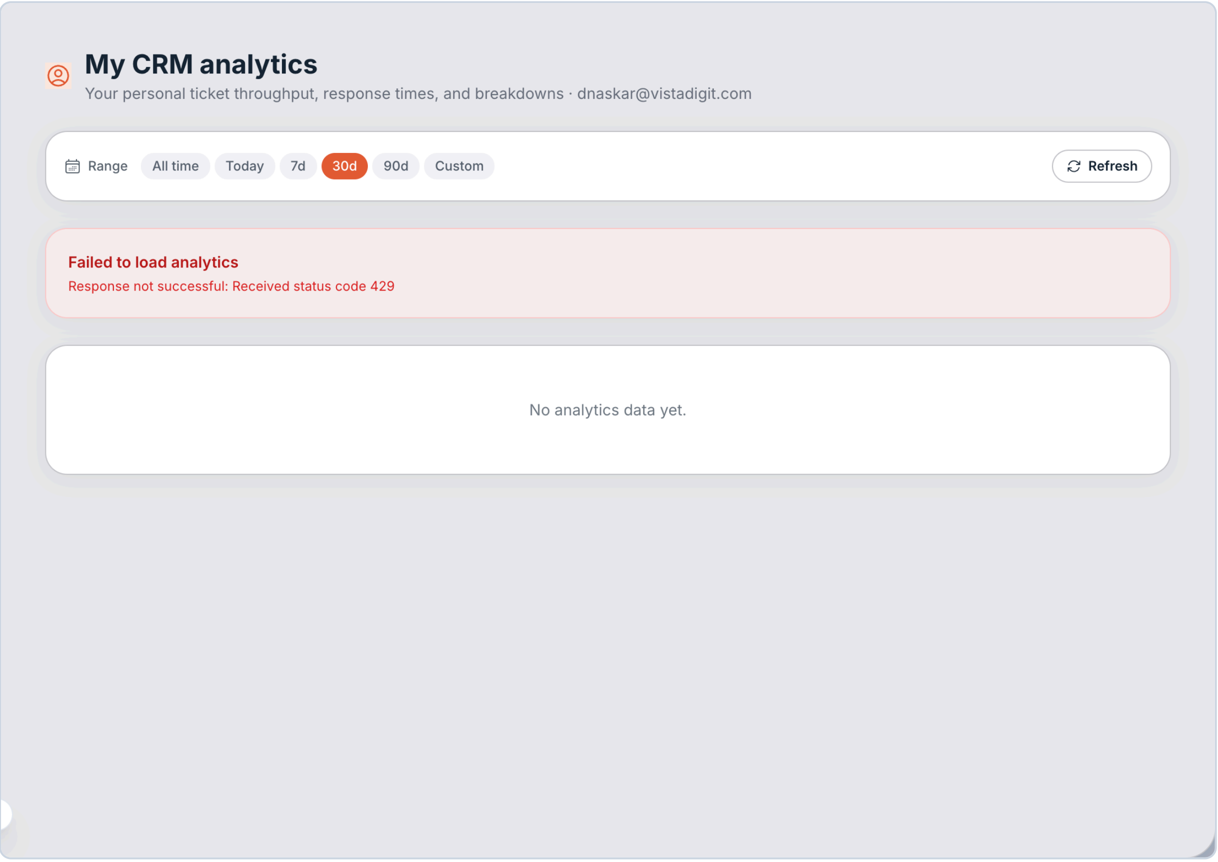
Group	Types
Identifiers	Email, Phone, WhatsApp, Visitor ID
Social profiles	Instagram URL/ID, Facebook URL/ID

Social profiles are saved for reference — they don't affect messaging or contact matching.

Validation is strict, and deliberately so: *Email must look like name@example.com*, and phone numbers *must be E.164 (e.g. +14155552671) — include country code, digits only.* A number without a country code cannot be messaged.

The merge behaviour is the important part. Adding an identifier that already exists elsewhere folds the record into the existing contact — which is how a customer who first chatted anonymously and later gave an email becomes one person rather than two. If an identifier set spans more than one existing contact, it refuses: *These identifiers overlap with more than one existing contact — an admin merge is required.*

Support analytics



My CRM analytics.

Three pages share one dashboard, scoped differently.

Page	Scope	Who
My Analytics	Your own tickets	Everyone
Agent Analytics	A chosen agent	Supervisor, owner
Supervisor Analytics	Org-wide, plus leaderboard	Owner

Blocked access is explicit: *Agent Analytics is available to organization owners and supervisors.* and *Supervisor Analytics is restricted to organization owners.*

Metrics:

Card	Notes
Total tickets	With **{n} unassigned** underneath
Open	
Resolved	
Closed	
Avg resolution	With **p90** underneath
First response	*avg time to first agent touch*

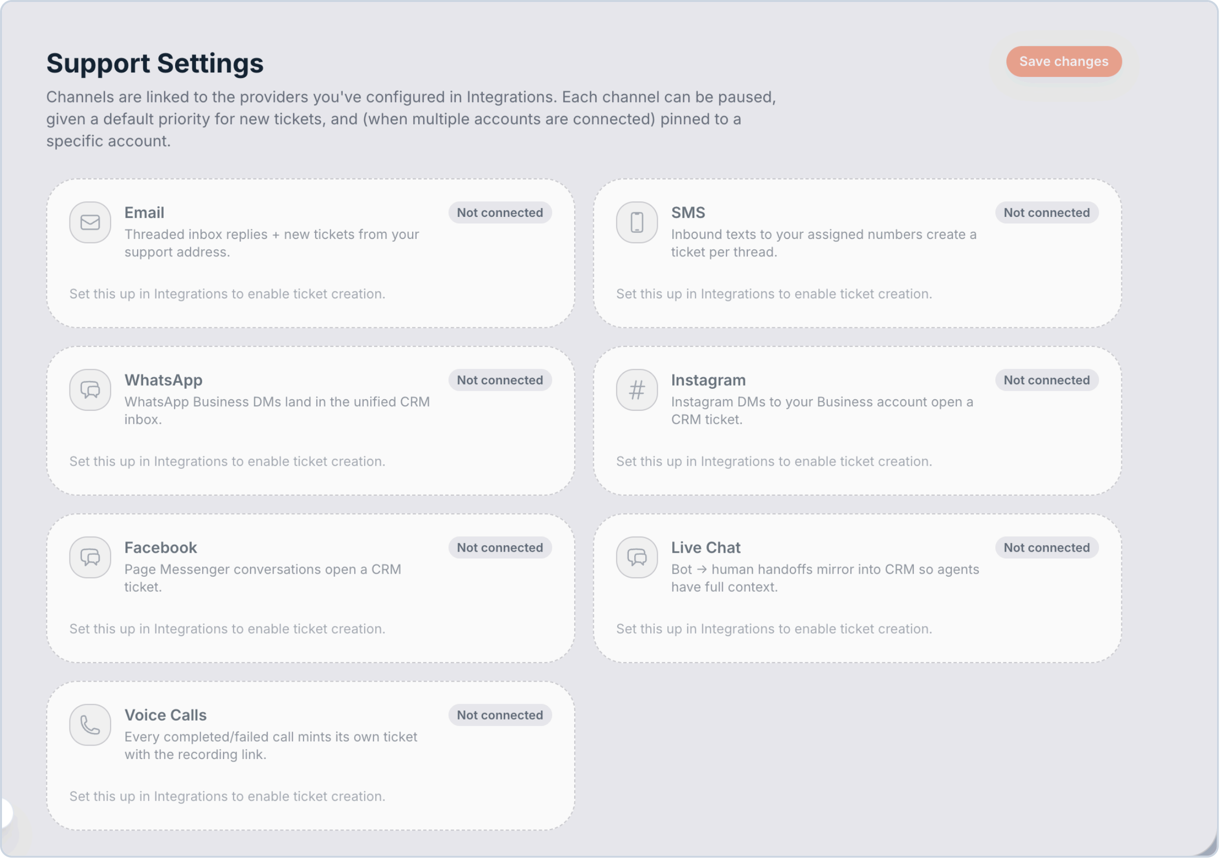
Avg resolution carries a p90 for a reason — averages hide the tail. If the average looks fine and p90 is dreadful, you have a small number of tickets rotting, which is what customers actually complain about.

Panels: **Tickets over time** (*Created vs resolved per day*), **By status**, **By priority**, **By channel**, **Top tags**, and — on Supervisor Analytics only — **Agent leaderboard** with **Agent**, **Open**, **Resolved**, **Closed**, **Avg resolution**.

The range filter is a chip set — **All time**, **Today**, **7d**, **30d**, **90d**, **Custom** — defaulting to **30d**. Note this differs from the two-date picker used in Insights.

Empty: *No analytics data yet.* and, per chart, *No data in this range*.

Settings



Support Settings.

Owners and admins can edit; others see *You're viewing in read-only mode — only organization owners and admins can change these settings.*

Support Settings — *Channels are linked to the providers you've configured in Integrations. Each channel can be paused, given a default priority for new tickets, and (when multiple accounts are connected) pinned to a specific account.*

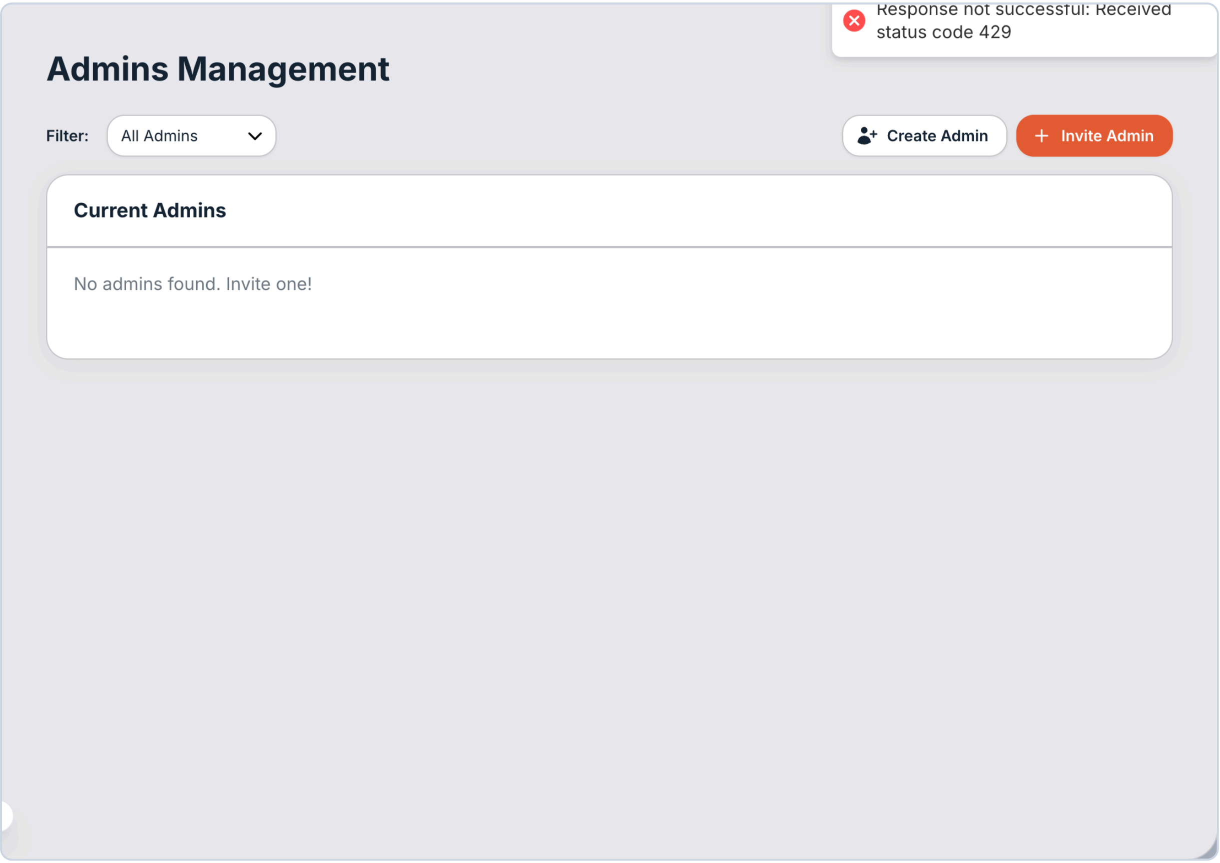
Channel	What it creates
Email	*Threaded inbox replies + new tickets from your support address.*
SMS	*Inbound texts to your assigned numbers create a ticket per thread.*
WhatsApp	*WhatsApp Business DMs land in the unified CRM inbox.*
Instagram	*Instagram DMs to your Business account open a CRM ticket.*
Facebook	*Page Messenger conversations open a CRM ticket.*
Live Chat	*Bot → human handoffs mirror into CRM so agents have full context.*
Voice Calls	*Every completed/failed call mints its own ticket with the recording link.*

Each channel has a toggle, a **Default priority** (**Low**, **Medium**, **High**, **Urgent**), and — with several accounts connected — an **Account** picker defaulting to **All connected accounts**.

Channels you have not wired up show **Not connected** with a link to **Configure in Integrations**. Paused channels show **Ticket creation paused**.

Voice Calls is worth a deliberate decision: it mints a ticket for *every* completed or failed call. On a busy calling floor that is a lot of tickets. Pause it, or accept the volume knowingly.

Team management



Managing admins.

Three near-identical pages under the sidebar's **Users** section: **Admins Management**, **Agents Management**, **Supervisors Management**. Agents and Supervisors are owner-only; Admins is open to owners and admins, matching the API, which accepts either role for inviting, creating, and deactivating an admin.

Filter by **All**, **Active**, **Inactive**, or **Pending** for that role, and add people two ways:

Route	Behaviour
Invite {Role}	Emails an invitation. Creates a **Pending Invite** row that can be resent or deleted
Create {Role}	*Set up a new {role} with a username and password. They can sign in immediately — no invitation email is sent.*

Create {Role} requires **Email**, **First name**, **Last name**, **Password**, and **Confirm password**, with a live checklist: **At least 8 characters**, **Uppercase letter (A-Z)**, **Lowercase letter (a-z)**, **Number (0-9)**, **Special character (!@#$%...)**. There is a **Generate strong password** helper.

Use **Invite** normally; use **Create** for people who cannot receive the invitation email, or when you are onboarding someone in the room with you.

Rows show **Active**, **Inactive Member**, or **Pending Invite**, with actions to **Resend Invitation**, **Delete Pending {Role}**, or **Deactivate** / **Activate**. Deactivating preserves the record and their history; it is the right move when someone leaves.

Empty: *No admins found. Invite one!*

Member permissions

Users → Permissions (`/users/permissions`). Owner-editable, and only owners see it in the sidebar; an admin who follows a link gets a read-only note — *What each role in this workspace may do. Only the organization owner can change it.*

A grid of capabilities down the side and the three member roles across the top — **Admins**, **Supervisors**, **Agents**. Untick a box to take that capability away from that role. Each column saves on its own, with **Save** and **Reset** appearing under a column once you change it and **Saved** the rest of the time.

This only ever takes access away. A capability a role has never had is shown greyed out and cannot be handed over — hovering explains *{Role} never had this capability, so it cannot be granted here*. A workspace that never opens this page behaves exactly as it always has.

Owners have no column: they always hold everything, which is what keeps the page itself reachable.

Group	Capabilities
Billing	View the plan and payment methods; change plan and payment methods
Organization	Change organization settings; view API keys; create and revoke API keys; view team members; invite and deactivate team members
Data	View data collections; create and edit data collections; delete data collections
Call centre	See every rep's calls on the floor; view call centre minutes and charges; see the whole lead book; change ring groups, menus and numbers; change automated follow-up rules

Two behaviours are worth knowing before you use it:

Revoking a view also revokes the matching manage. Dropping *View data collections* clears *Create and edit* and *Delete* with it, since a capability you cannot see is not one you can use. The grid redraws to show what was actually stored.

Members already signed in pick the change up on their next page load, not instantly.

This is not the same as Sidebar sections

The sidebar's **Customize menu** control hides whole sections for tidiness and changes nobody's access — a hidden page is still reachable by URL. Permissions is enforced on the server, in the resolver behind each page. Use the sidebar control to declutter and this page to actually forbid.

One consequence worth calling out: **every role can read the plan and payment methods by default**, because the sidebar hides *Subscription* from agents and supervisors but the URL never did. Revoking *View the plan and payment methods* is what closes that.

Troubleshooting

Symptom	Usual cause
Nothing arrives in Support Chat	No **Human Handoff** node in the workflow, and no visitor asking for a person
Requests sit **Pending** for hours	Outside **Business Hours** in Setup — they wait for the next window
Visitor told nobody is available during working hours	The business-hours schedule has no slot covering now
An agent cannot edit a ticket	Agents can only edit tickets assigned to them — **Self assign** first
Reassign, tags, or bulk actions greyed out	Those need owner, admin, or supervisor
An admin clicks **Admins** and gets nothing	That page is owner-only despite being listed for admins
A reply channel is disabled	The contact has no identifier for it — check the tooltip
A customer never got the reply	Look for **Reply to customer failed** in the activity feed
A channel shows **Not connected**	Configure the provider in Integrations first
Overwhelmed by call tickets	**Voice Calls** mints one per completed or failed call; pause it in Settings
The same customer exists twice	They had no shared identifier; adding one merges them
Merge refused	The identifiers span two contacts and need an admin merge
Take over fails	Another agent won the race, the call ended, or the listener cap was hit
Audio unavailable but transcript live	The monitor bridge is unreachable; read along instead
Analytics look empty	Check the range chip — it defaults to 30 days

Symptom	Usual cause
Avg resolution fine but customers complaining	Read p90; the tail is where the complaints are

Related

- Support quick start
- Chat — the **Human Handoff** node that feeds this inbox
- AI Calls — the calls you take over
- Call Centre — the outbound human calling floor
- Setup — business hours, escalation timings, team pages
- Integrations — the channels tickets arrive on
- Insights — agent and call analytics

COMPLETE MANUAL · SECTION 9

Data

Capture structured data from conversations, take bookings, and read the visitor analytics behind both.

Dashboard sidebar: Data

Who can see this: Hidden from agents and supervisors.

Complete reference for the **Data** section — data collections and booking calendars — plus the **Visitor Dashboard**, which now lives under **Dashboard**.

Hidden from agents and supervisors.

For the fast path, use the Quick Start.

Section map

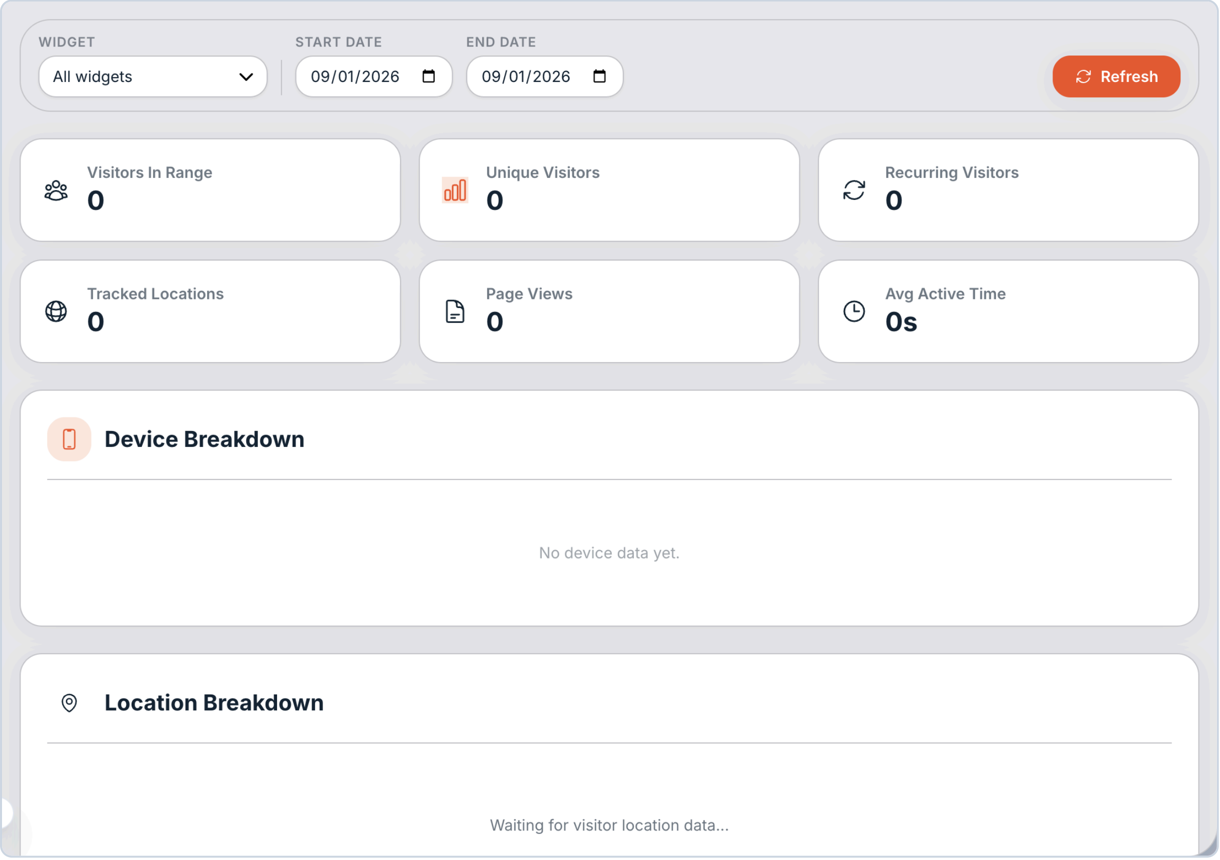
Sidebar page	Path	What it is
Data Collections	`/data-collections`	Structured tables the AI reads and writes
Calendars	`/calendars`	Bookable calendars backed by a data collection

Visitor Dashboard (`/visitor-dashboard`) is no longer in this section — it sits under **Dashboard**, alongside the rest of the analytics. It is still documented below, because it reports on the same conversations.

Data collections are the load-bearing concept here. The same store powers the Call Centre lead book, workflow data lookups, campaign contact sources, and calendar appointments — so a change here is felt in several places.

Visitor Dashboard

Reached from **Dashboard → Visitor Dashboard**. Like the rest of this section it stays hidden from agents and supervisors, even though the Dashboard group itself is open to every role.



The Visitor Dashboard.

Filters

Control	Notes
Widget	**All widgets**, or one specific widget
Start Date / **End Date**	Cannot be set past today

The default range is the **first of the current month through today**.

This page is **not live**. It fetches when you open it or change a filter, and otherwise only on **Refresh**.

Tiles

Tile	What it counts
Visitors In Range	Visitors seen in the window
Unique Visitors	Distinct visitors
Recurring Visitors	Visitors seen across more than one session
Tracked Locations	Distinct locations resolved
Page Views	Total page views
Avg Active Time	Mean active time per visitor

Avg Active Time is active time, not time-on-page — it comes from heartbeats while the tab is actually in use, so it is a much more honest engagement figure than a raw duration.

How a visitor is identified

Each visitor gets an id that is **unique per widget**. The same person visiting two sites that carry two different widgets is two visitors, and there is no cross-widget identity stitching here. Compare a single widget over time rather than summing widgets.

Nothing here requires a login — this is anonymous website analytics, tied to the widget rather than to a customer record. To connect a visitor to a person, see Contacts, where **Visitor ID** is one of the identifier types.

What is tracked

Group	Fields
Device	Type, OS, browser, user agent, language, timezone, screen and viewport size
Location	Country, region, city, coordinates, timezone, source
Per page	Path, URL, title, referrer, page type, page views, active time, heartbeats, events, engagement score
Timing	First seen, last seen

Panels

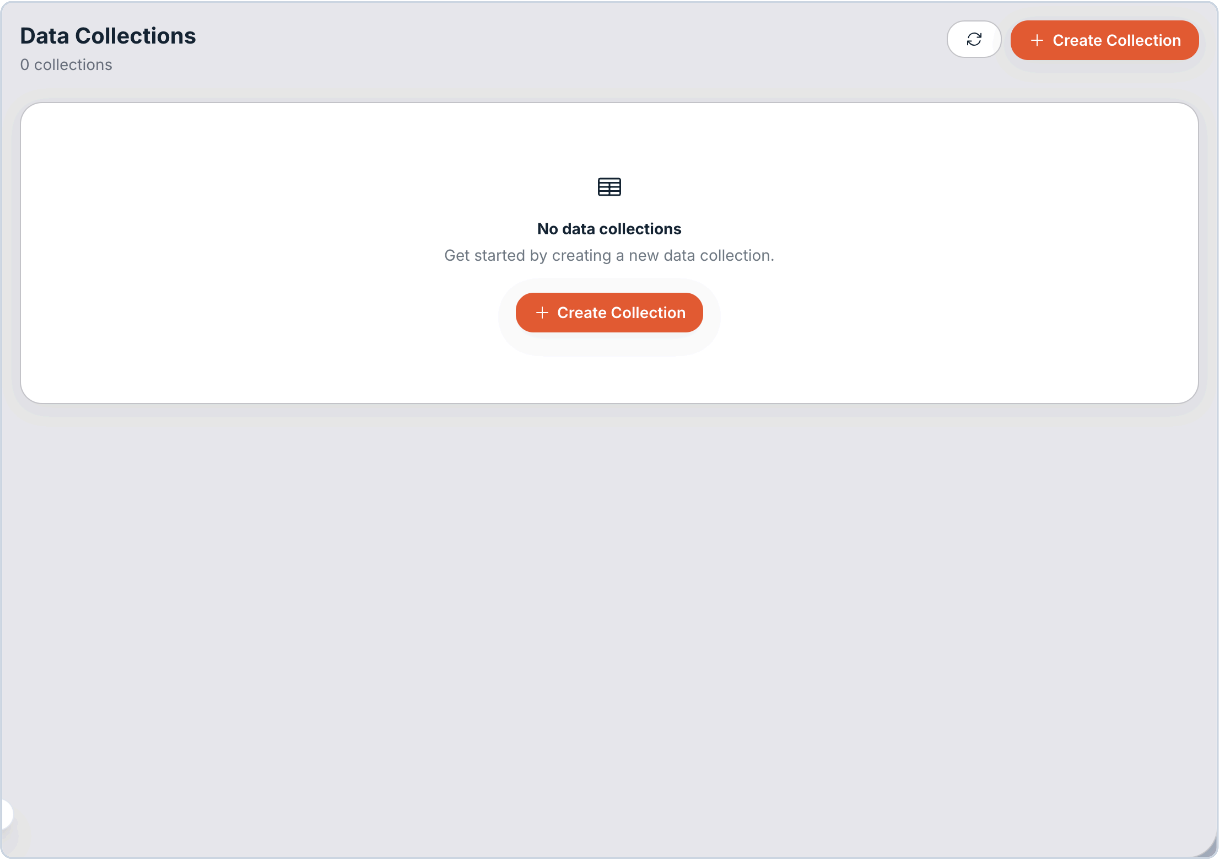
Device Breakdown — a percentage split per device with a visitor count. Empty: *No device data yet.*

Location Breakdown — expandable region rows that drill down to cities. Empty: *Waiting for visitor location data...*

Page Details — columns **Page**, **Type**, **Visits**, **Page Views**, **Unique**, **Recurring**, **Locations**, **Avg Active**, **Score**, **Devices**. Empty: *No visitor page data has been collected for this date range yet.*

The **Score** column is an engagement score computed from active time, heartbeats, and events. Use it to find pages that hold attention rather than merely attract clicks.

Data Collections



The Data Collections list.

The collections list

Heading **Data Collections**, with a subheading counting collections and how many are sheet-linked.

Control	Notes
Create Collection	Disabled at your plan limit, replaced by **Upgrade to create more**
Add Shopify data	Owner or admin, where Shopify collections are enabled
Search	*Search collections...*
Link filter	**All collections**, **Sheet-linked**, **No sheet**, **Sync halted**
Sort	**Recently updated**, **Name**, **Most rows**

Each card shows row and column counts, when it was updated, and status chips:

Chip	Meaning
Shopify · Products / Orders / Customers / Abandoned checkouts	A managed Shopify mirror
Sync failed, **Syncing...**, **Synced {when}**	Shopify sync state
Sheet linked, **No sheet linked**, **Sync halted**	Spreadsheet state
Used by {n} campaign(s)	A campaign depends on this collection

Card actions: **View Data →**, an export menu (**Export as CSV**, **Export as Excel**), **Edit**, and delete. Owners and admins also get a bookmark action — see Pinning a collection to the sidebar.

Used by {n} campaign(s) is a warning, not decoration. Deleting such a collection breaks those campaigns' contact source, and the confirmation says so explicitly.

Empty: **No data collections** — *Get started by creating a new data collection.*

Pinning a collection to the sidebar

A workspace that lives in two or three collections should not have to go through the list every time. Owners and admins get a bookmark action on each card that promotes that collection to its own entry in the **Data** sub-panel, under **Data Collections** and **Calendars**.

Detail	Behaviour
Who can pin	Owner or admin. Everyone else sees the pins but cannot change them
Limit	**10** pins. At the limit the bookmark action is disabled and explains why
Scope	Workspace-wide, not personal — every member gets the same pinned entries
Label	The collection's name at the time you pinned it, capped at 40 characters
Order	Pins appear in the order they were added

Two consequences worth knowing. The label is a **snapshot**: renaming a collection afterwards does not rewrite the menu entry, so re-pin it if the name matters. And pins are dropped on save if the collection has left the organization, which also means a collection deleted while pinned leaves an entry that resolves to nothing until the pins are next saved — unpin it to clear it.

Opening a pinned collection highlights the pinned entry rather than the general **Data Collections** one, and the header shows the pin's label.

Creating a collection

Create New Collection — *Define the structure for your data collection*. Two modes:

Mode	Behaviour
Start blank	Define columns by hand
Upload a file	*Choose a .csv, .xlsx or .xls file — The schema is detected automatically · up to 7MB*

Multi-sheet workbooks prompt for a **Worksheet** — *This file has multiple sheets — pick which one to import.*

Some column names are reserved for the system; the form refuses until you rename them.

Field	Notes
Collection Name *	Required — *e.g., Customer Database, Product Catalog*
Description	Optional
Columns *	At least one, names unique

Column types

String, **Number**, **Date**, **Boolean**, **Email**, **URL**, **Phone**, each with an optional **Required** flag.

The type is not cosmetic. **Phone** and **Email** are what make a row addressable by SMS, WhatsApp, email, and the dialler; a phone number typed as **String** will not reliably work downstream. Fix types before importing thousands of rows.

Columns written by the platform are badged **System** — *Written automatically by campaigns — cannot be edited or removed*. Campaign slot answers and `Call *` outcome columns land here.

Renaming or removing a column that holds data warns first: **Existing values will no longer be shown** — the values stay in the database but stop appearing, and *This cannot be undone from here.*

Spreadsheet Sync

Optional, configured on the create or edit form.

Control	Options
Enable Synchronization	Toggle
Provider	**Google Sheets**, **Microsoft Excel**
Google Account / Microsoft Account	A connected account
Folder Location	**Root Folder**, **Select Folder**, **Create Folder**
File Option	**Create new file**, **Select existing file**
Spreadsheet Title, **Sheet Title**	For a new file

Accounts come from Integrations → **Sheets**. With none connected: *No Google/Microsoft accounts connected. Go to Integrations → Sheets to connect one.*

The sync is **bidirectional**. Rows flow both ways, conflicts resolve in favour of the more recently updated side, and column changes here are pushed to the sheet — *Column changes are applied to the linked spreadsheet as well.*

Once linked, the collection is pinned to that file: **Spreadsheet Integration Active** — *This collection is locked to a specific Google Spreadsheet / Excel Workbook to maintain sync integrity.*

If the sheet stops matching the expected layout, sync halts rather than corrupting data: **Spreadsheet sync halted — sheet failed validation** — *Data here is safe and stays usable, but changes no longer flow to or from the sheet. Fix the sheet, then re-validate to resume synchronization.* Fix the layout and press **Re-validate**.

The practical warning: people rearranging columns in the shared sheet is the single most common cause of a halted sync. If several people can edit the sheet, expect this.

The detail page

Header shows the name, row count, the backing import source, a link to the linked sheet, and the last sync time.

Control	Notes
Add Entry	One row, typed inputs per column
Upload File	Append CSV or Excel
Manage Columns	Edit the schema
Export	**Export as CSV**, **Export as Excel**
Sync from Spreadsheet	Pull from the linked sheet
Delete All	Every row — *This action cannot be undone*

Table controls: rows per page (**10**, **25**, **50**, **100**), *Search rows...*, and a **Filters** panel offering a per-column value filter, **Call Status** where such a column exists, **Sheet Sync** (**All**, **Synced**, **Not synced**), and a created-date range. Rows are editable in place.

There is **no template download** anywhere — to get a correctly shaped file, create the collection and export it empty.

Shopify-managed collections

A collection mirroring Shopify is read-only: **Synced from Shopify — read-only**, with *Rows refresh automatically every 30 minutes* and a **Sync now** button.

Do not plan to edit these. To enrich Shopify data, copy what you need into a collection of your own. See FloGPT for Shopify.

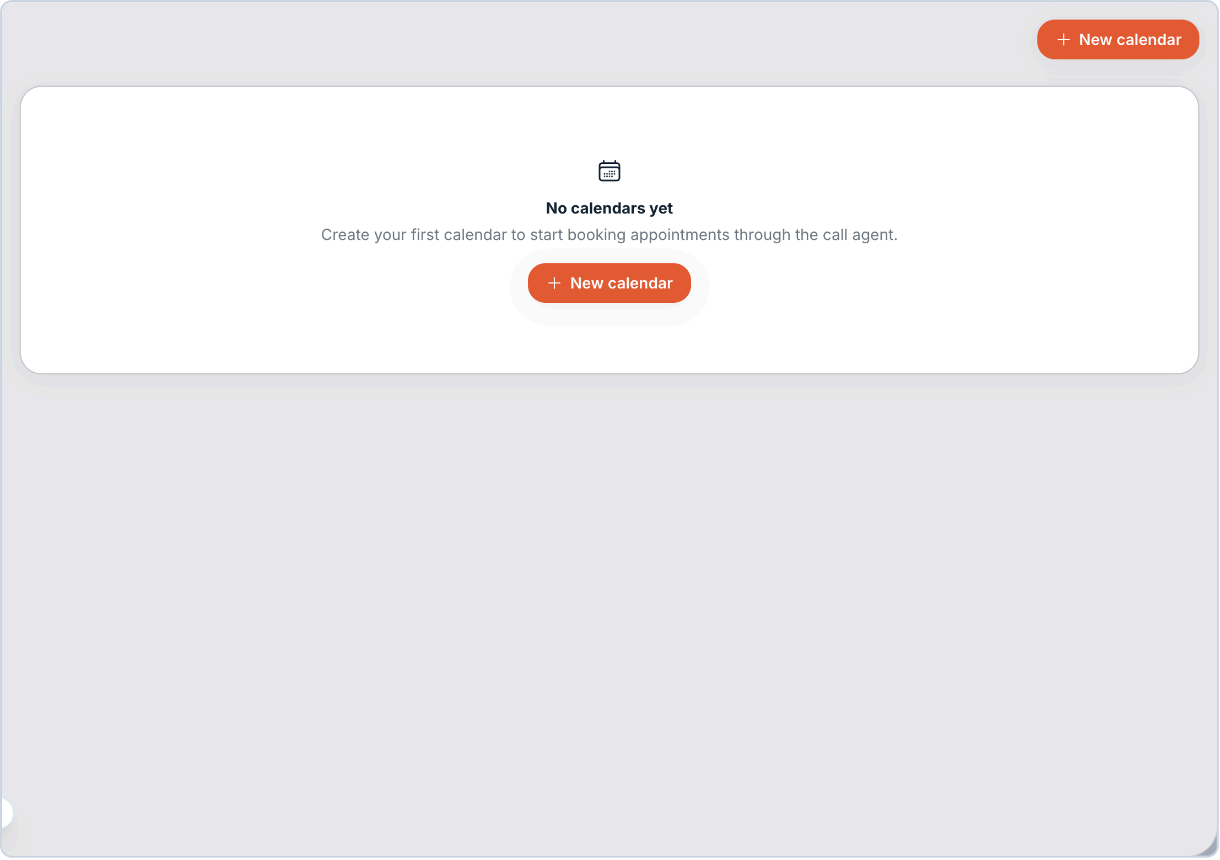
Data collections as lead lists

A collection doubles as a **lead list** for the Call Centre. Alongside your columns, each row carries lead fields the calling floor maintains:

Field	Values
Assigned rep and assignment time	—
Pipeline status	`new`, `contacted`, `callback`, `won`, `lost`
Potential	`hot`, `warm`, `cold`
Follow-up, first and last contacted timestamps	—
Tags, messaging opt-out	—

This is why a collection built here appears as a lead list there, and why the `Call *` columns appear on rows you never touched. The two features are one store viewed two ways.

Calendars



The Calendars list.

Each calendar wraps a **data collection** whose rows are appointments. One calendar per collection.

The calendars list

Cards show the calendar name, description, its backing collection, the appointment count, and the timezone, plus a sync pill — **Not synced**, **Sync error**, **Syncing**, **Connected** — and a **Google** or **Microsoft** provider chip. Actions: **Open**, **Sync now**, delete.

Empty: **No calendars yet** — *Create your first calendar to start booking appointments through the call agent.*

Deleting is deliberately conservative: *The backing DataCollection (and all its appointment rows) will be preserved — only the calendar wrapper is removed. You can delete the DataCollection separately if you want the data gone.*

Creating a calendar

Field	Notes
Name	Required — *e.g. Sales demos, Doctor visits*
Description (optional)	
Timezone	All availability is interpreted in it
Slot duration (min)	5–240, step 5, default 30
Storage	**Auto-create a new Data Collection** or **Use an existing Data Collection**

Take the recommended storage option — *We'll create a Data Collection with the standard appointment columns (Start, End, Customer Name, Customer Phone, etc.)*. The existing-collection path exists for appointment data you already hold, and requires mapping columns by hand afterwards.

Availability settings

Settings on the detail page:

Field	Range	Default
Slot duration (min)	5–240	30
Buffer (min)	0–60	—
Capacity per slot	1–100	1
Max advance days	1–365	30
Working hours	Per day, with enable and start/end times	Mon–Fri 09:00–17:00

Capacity per slot above 1 turns the calendar into a group booking — several people in the same slot, with the UI showing **Remaining {r} / {c}**. Leave it at 1 for one-to-one appointments.

Max advance days is how far ahead anyone can book. Set it to match how far ahead you can actually honour commitments.

Column mapping

Each appointment is a row in the backing Data Collection. Pick which column stores each field. Required fields (Start, End) must point at columns that exist on the Data Collection.

Logical field	Default column
Start *, **End ***	`Start`, `End`
Customer name, **Customer phone**, **Customer email**	`Customer Name`, `Customer Phone`, `Customer Email`
Status, **Notes**, **Source**	`Status`, `Notes`, `Source`
External event id, **External calendar id**, **External updated at**	`External Event ID`, `External Calendar ID`, `External Updated At`

Auto-created collections are mapped for you. You only touch this when you brought your own collection.

Booking

The month grid shows appointments per day, an **Appointments ({n})** panel, and an **Available slots** list with a **Block slot** control per slot.

Book an appointment takes:

Field	Rules
Date	Not in the past, not beyond **Max advance days**
Start time	Chosen from free slots; shows *{n}-minute slots · {timezone}*
Customer name	2–80 characters, letters, spaces, hyphens, apostrophes, dots, commas
Phone (with country code)	E.164 — *e.g. +919876543210 or +14155552671*
Email, **Notes**	Optional

Block slot removes availability without creating a customer appointment — the right tool for holidays and meetings. With capacity above 1 it blocks all remaining seats.

Every appointment records how it arrived: from a call, manually, imported, from the external calendar, or as a manual block. Your voice and chat agents book through the same path and the same capacity rules, so a slot cannot be double-booked between a human and the AI.

External calendar sync

Sync with Google / Microsoft Calendar uses the accounts connected under Integrations → **Sheets**.

With none connected: *No Google or Microsoft account connected for this organization. Go to Integration → Sheets and connect one.*

The common failure is a connected account that lacks calendar scope: *This account is missing Calendar permission. Disconnect and reconnect it under Integration → Sheets so Google/Microsoft can grant Calendar access, then try again.* Reconnecting is the only fix — the permission cannot be added to an existing connection.

Pick an **Account**, **Load** its calendars, choose an **External calendar**, then **Save sync config**. **Sync now** runs it on demand, and the panel reports **Last synced** and **Connected**. Sync is bidirectional.

Troubleshooting

Symptom	Usual cause
Visitor numbers look doubled	Visitors are identified per widget; the same person on two widgets counts twice
Visitor dashboard looks stale	It does not auto-refresh — press **Refresh**
Waiting for visitor location data...	No location resolved yet for this range
SMS or dialling ignores a column	The column is typed **String** rather than **Phone**
A column cannot be edited	It is a **System** column written by campaigns
Old cell values vanished after renaming a column	Expected — the data remains but is no longer displayed
Upload rejected	Not `.csv` / `.xlsx` / `.xls`, or over 7MB
Cannot find a template to fill in	There is none; export an empty collection instead
Sync halted on a collection	Someone changed the sheet's layout — fix it and **Re-validate**
Rows will not edit	It is a Shopify-managed mirror, which is read-only
Deleting a collection warns about campaigns	A campaign uses it as its contact source
Calendar deleted but the data is still there	By design — delete the backing collection separately
Calendar sync fails on permission	The account lacks calendar scope; disconnect and reconnect it
AI booked outside working hours	Check the calendar's timezone, not just its hours
Slot shows as unavailable unexpectedly	Buffer minutes, or the slot was blocked with **Block slot**

Related

- Data quick start
- Call Centre — the same collections as lead lists
- Chat — workflows that read and write collections
- AI Calls — call agents that capture data and book
- Integrations — Google and Microsoft accounts
- Support — contacts, where **Visitor ID** links a visitor to a person
- FloGPT for Shopify — Shopify-managed collections

COMPLETE MANUAL · SECTION 10

Integrations

Connect Shopify, your CRM, Google Sheets, Meta, LinkedIn, email, and SMS.

Dashboard sidebar: Integrations

Who can see this: Hidden from agents and supervisors.

Complete reference for the **Integrations** section — every connector, exactly what each one needs, what it does once connected, and which direction data flows.

Hidden from agents and supervisors. There is no per-tab role gate beyond that; the backend authorises on organization membership.

For the fast path, use the Quick Start.

Section map

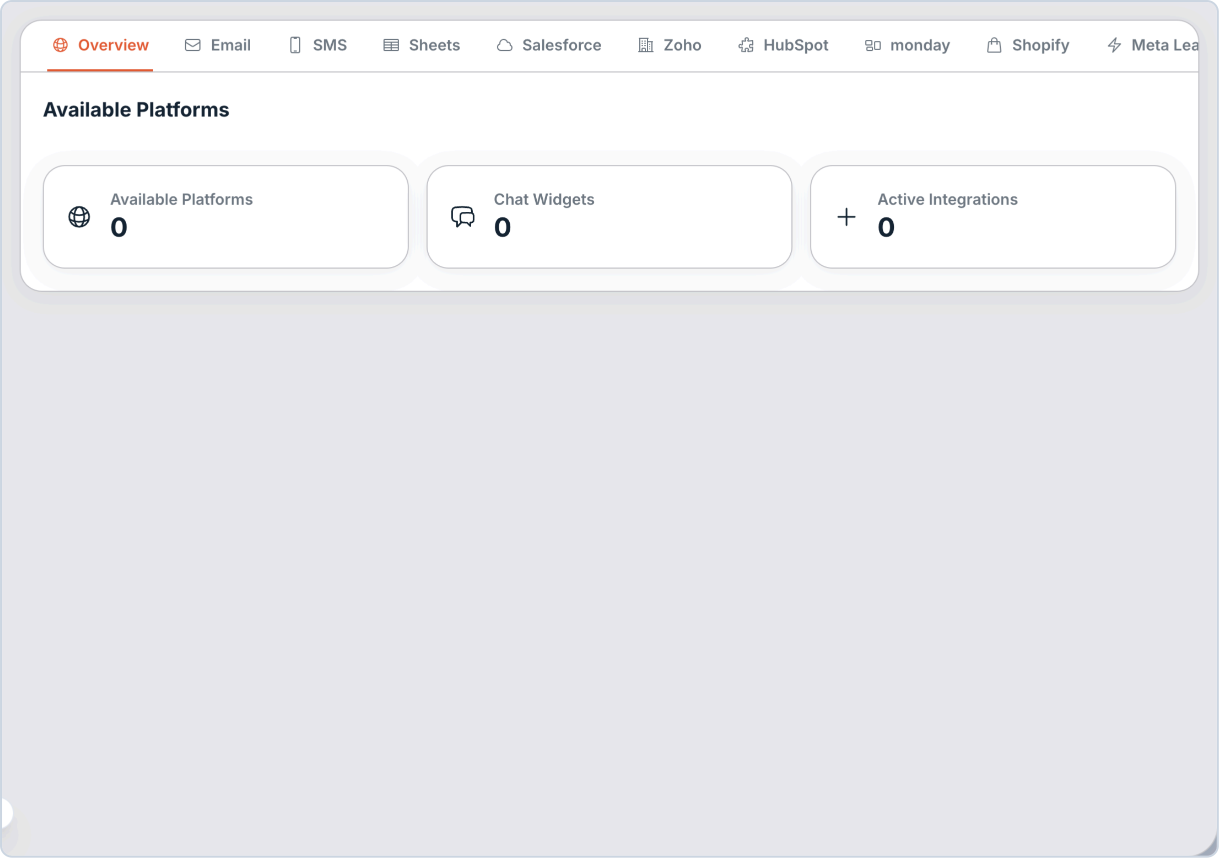
Integrations is a **single tabbed page** at `/integration/:tab`, not one page per connector — which is why the tab bar stays put as you move between them. `/integration` redirects to `/integration/overview`.

Tab	Path	Connection style
Overview	`/integration/overview`	—
Email	`/integration/email`	SMTP / IMAP credentials
SMS	`/integration/sms`	Pick a Telnyx number
Sheets	`/integration/sheets`	OAuth
Salesforce	`/integration/salesforce`	OAuth
Zoho	`/integration/zoho`	OAuth
HubSpot	`/integration/hubspot`	OAuth
monday	`/integration/monday`	OAuth
Shopify	`/integration/shopify`	App Store OAuth, or a manual custom app
Meta Lead Ads	`/integration/meta`	Access token + webhook
Meta Messaging	`/integration/meta-messaging`	Tokens + webhook
LinkedIn Lead Gen	`/integration/linkedin`	Access token

What is not available

Telegram, Slack, and Discord appear as options in one dropdown but have no tab, no overview card, and no working connection flow. **They are not usable.** Do not plan around them.

Overview



Integrations → Overview.

Available Platforms cards the five messaging and email channels only:

Platform	Description
WhatsApp Business	*Connect your chat widget to WhatsApp Business API for seamless customer communication*
Email Integration	*Configure SMTP email settings to send emails through workflow nodes*
Facebook Messenger	*Reach customers on Messenger. Free inside the 24h session window; outside the window we send with a Meta MESSAGE_TAG (configured per event).*
Instagram Direct Messages	*Connect an Instagram Business account. In-window replies are free; outside the window, re-engagement requires the HUMAN_AGENT tag.*
SMS Integration	*Send and receive SMS on your phone numbers — used by workflow nodes, in-call tools, outbound triggers, and CRM ticket replies.*

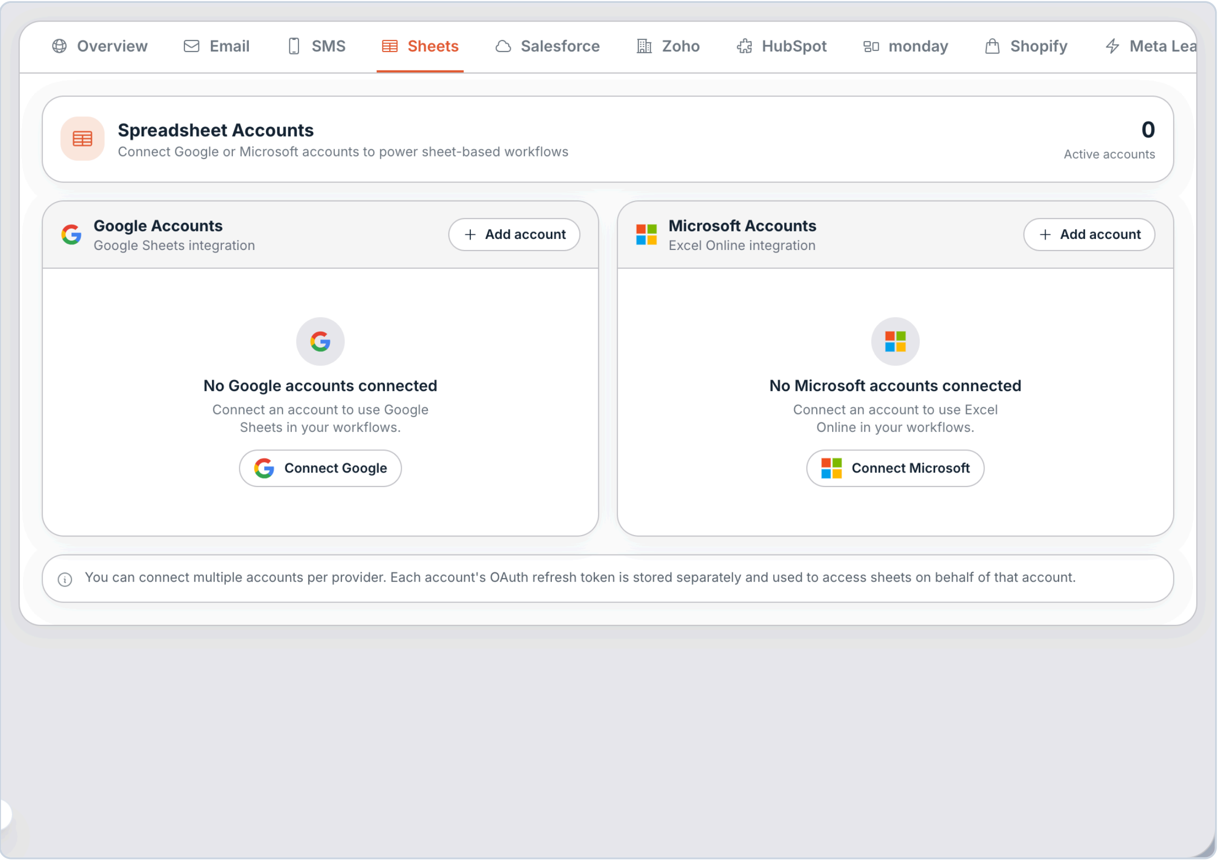
Each card carries an integration count and **Get Started**. WhatsApp, Facebook, and Instagram are badged **Meta Messaging**.

Overview is **not a catalogue of the whole section**. Sheets, the four CRMs, Shopify, Meta Lead Ads, and LinkedIn are absent — go to their tabs directly.

Tiles: **Available Platforms**, **Chat Widgets**, **Active Integrations**. A **Recent Integrations** table follows with **Platform**, **Name**, **Status**, **Messages**, **Actions**, and per-row **Deactivate** / **Activate** / **Edit** / **Delete**.

Statuses across the section are **ACTIVE**, **INACTIVE**, **ERROR**, and **CONFIGURING**.

Sheets



Integrations → Sheets.

Spreadsheet Accounts — *Connect Google or Microsoft accounts to power sheet-based workflows.* Two sections: **Google Accounts** (*Google Sheets integration*) and **Microsoft Accounts** (*Excel Online integration*).

Add account redirects you to the provider to approve access. Nothing is typed. You may connect **several accounts per provider**, each storing its own refresh token.

Cards show the account name and email, **Connected {date}**, a status badge (**Active**, **Error**, **Disconnected**), and **Disconnect** — *This will remove the stored refresh token. Any automations using this account will stop working.*

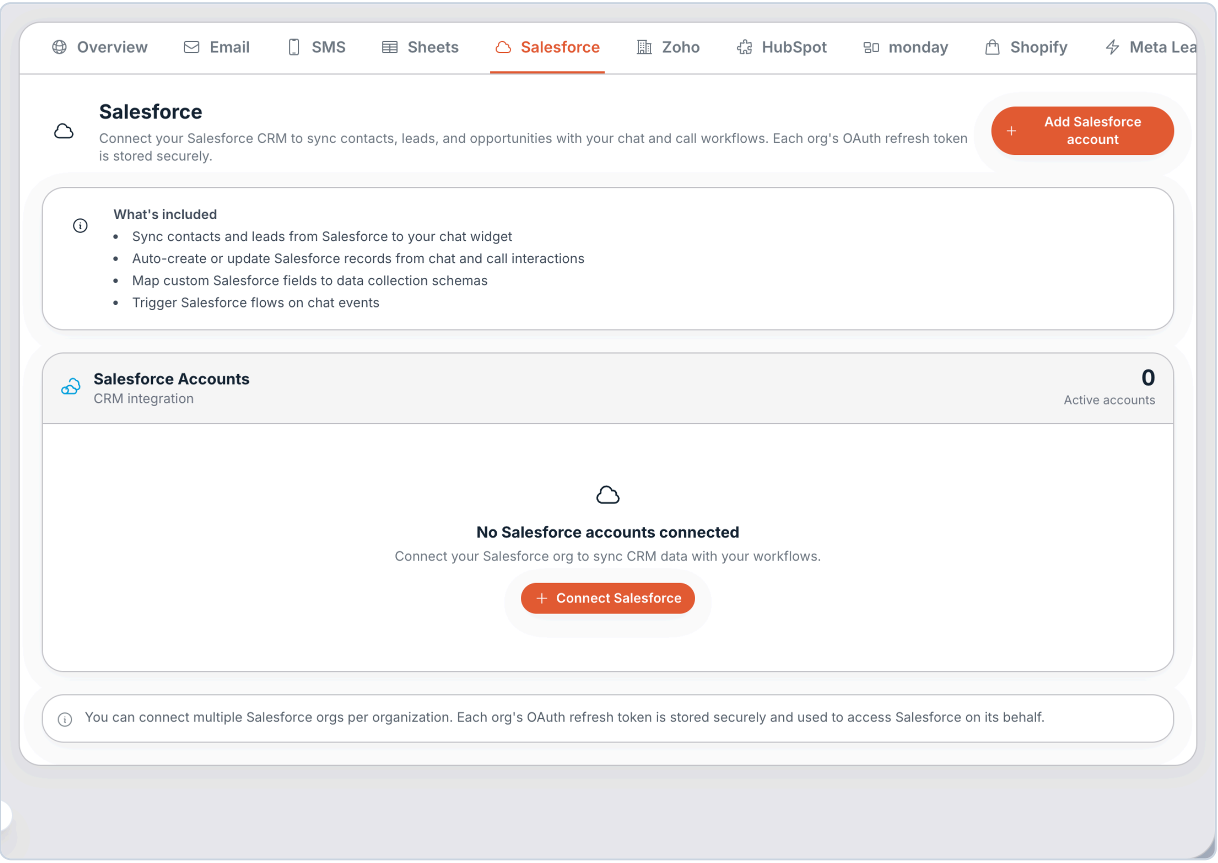
A card may warn · **Refresh token missing**, which means the connection cannot renew itself and will fail silently later. Reconnect it.

Empty: **No {Provider} accounts connected** — *Connect an account to use Google Sheets in your workflows.*

These accounts are used by more than workflows. **Data collection spreadsheet sync** and **calendar sync** both draw from this same list — see Data.

> Connect with calendar sync in mind. Calendar access is granted at connection time, so an account connected without it must be **disconnected and reconnected** before it can sync a calendar. There is no way to add the permission to an existing connection.

Salesforce



Integrations → Salesforce.

Connect your Salesforce CRM to sync contacts, leads, and opportunities with your chat and call workflows. Each org's OAuth refresh token is stored securely.

Add Salesforce account redirects you to Salesforce. Multiple Salesforce orgs can be connected.

What the tab advertises as included:

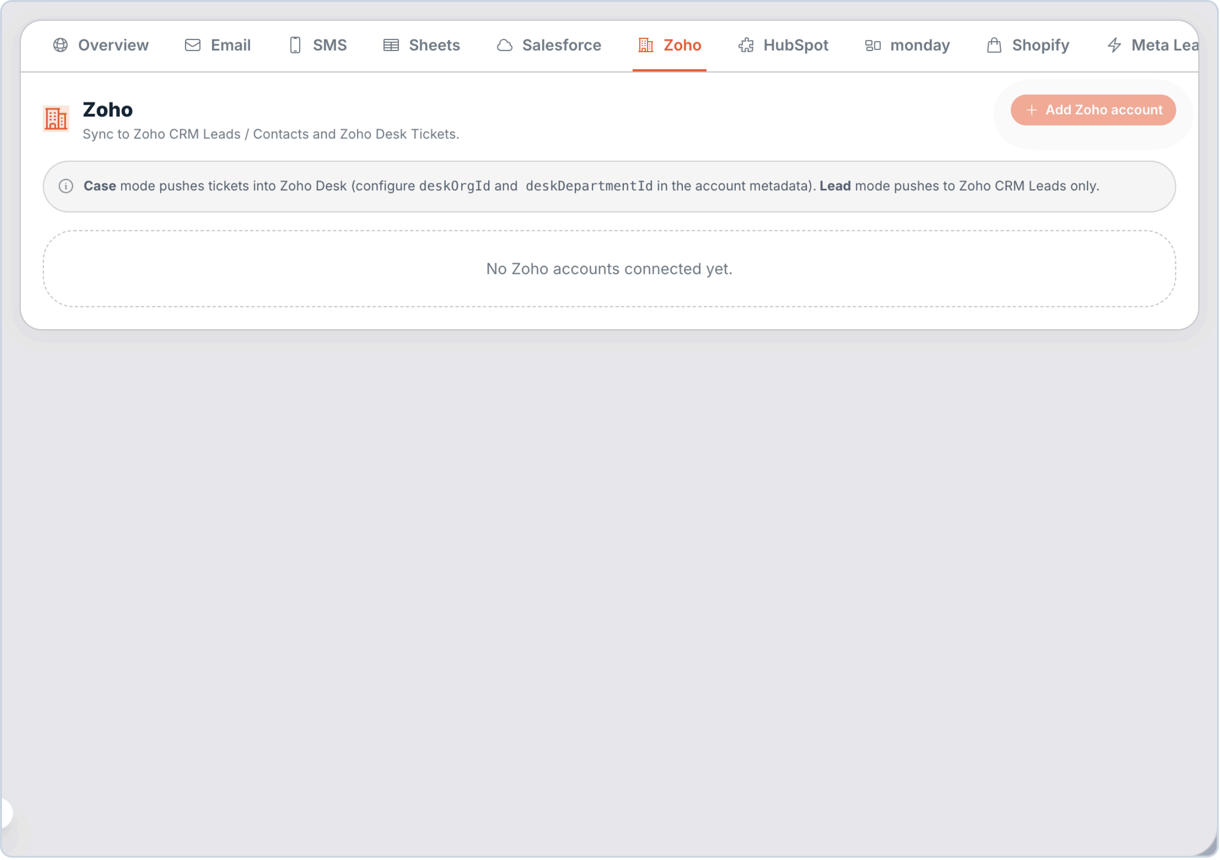
- *Sync contacts and leads from Salesforce to your chat widget*
- *Auto-create or update Salesforce records from chat and call interactions*
- *Map custom Salesforce fields to data collection schemas*
- *Trigger Salesforce flows on chat events*

Per-account settings:

Setting	Notes
Auto-sync with Salesforce	*When enabled, new contacts and tickets are pushed to Salesforce as Leads automatically.*
Sync new tickets as Leads	
Sync new contacts as Leads	
Default Lead company	*e.g. Acme Co (falls back to email domain)*

Direction is **outbound**: FloGPT pushes contacts and tickets into Salesforce as **Leads**. Each card reports **Last sync** or *No syncs yet*, plus **Last error** where one occurred — check that before assuming the sync is healthy.

Zoho, HubSpot, and monday



Integrations → Zoho.

These three share one interface, configured per provider.

Provider	What it syncs	Ticket becomes
Zoho	*Sync to Zoho CRM Leads / Contacts and Zoho Desk Tickets.*	**Ticket (Zoho Desk)** or **Lead (Zoho CRM)**
HubSpot	*Sync to HubSpot Contacts and Service Hub Tickets.*	**Ticket (Service Hub)** or **Contact only**
monday.com	*Mirror tickets and contacts as items on monday.com boards.*	**Board item**

All three connect over OAuth via **Add {provider} account**.

Shared per-account settings:

Setting	Notes
Auto-sync with {provider}	*New contacts, tickets, status changes, and notes are mirrored automatically.*
Sync new tickets	
Sync new contacts	
Mirror status & priority changes	
Mirror private notes as comments	
What floGPT tickets become in {provider}	Per the table above
Default company	*Falls back to email domain*

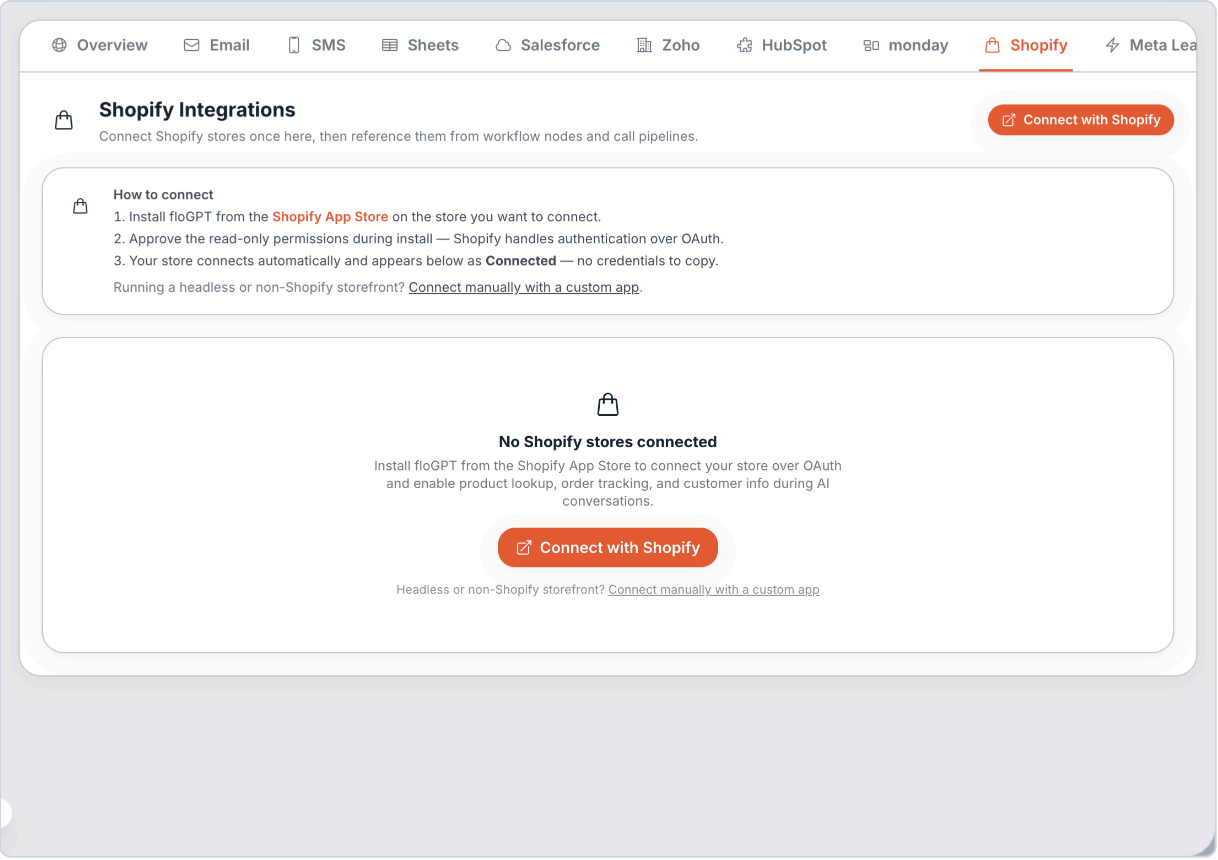
monday additionally requires a Ticket board id and a Contact board id — without them it has nowhere to create items. Get them from the board URL.

Unlike Salesforce, these are a **bidirectional mirror**: cards report both **Last push** and **Last inbound**.

Think before enabling **Mirror private notes as comments**. Internal notes in FloGPT are written for teammates; mirroring them into a shared CRM makes them visible to a wider audience than their authors assume.

Disconnecting warns: *The stored refresh token will be removed. Automations using this account will stop syncing.*

Shopify



Integrations → Shopify.

Shopify Integrations — *Connect Shopify stores once here, then reference them from workflow nodes and call pipelines.*

The normal path

Connect with Shopify opens the Shopify App Store. Install FloGPT, approve the read-only permissions — Shopify handles the OAuth — and the store appears as **Connected via Shopify** automatically, *no credentials to copy*. App-managed rows are read-only here and badged **Managed by your Shopify install**.

Cards show **API Version**, **Granted scopes**, and **Available actions** as chips. Those chips are what workflow nodes and call pipelines can actually do with the store, so check them when a Shopify action is missing from a node.

Empty: **No Shopify stores connected** — *Install floGPT from the Shopify App Store to connect your store over OAuth and enable product lookup, order tracking, and customer info during AI conversations.*

The manual path

Connect manually with a custom app exists for headless storefronts and is flagged accordingly: *Advanced path for headless or non-Shopify storefronts. Most merchants should instead install floGPT from the Shopify App Store, which connects the store automatically over OAuth with no credentials to copy.*

Field	Notes
Name	*Shown when picking an integration on a workflow node or pipeline.*
Description	Optional internal note
Store domain	*your-store.myshopify.com — Just the domain — no https:// prefix.*
Client ID	From your Shopify custom app
Client secret	*Encrypted at rest. Used to mint short-lived access tokens for storefront API calls.*
API version	*Defaults to 2026-01 if blank.*

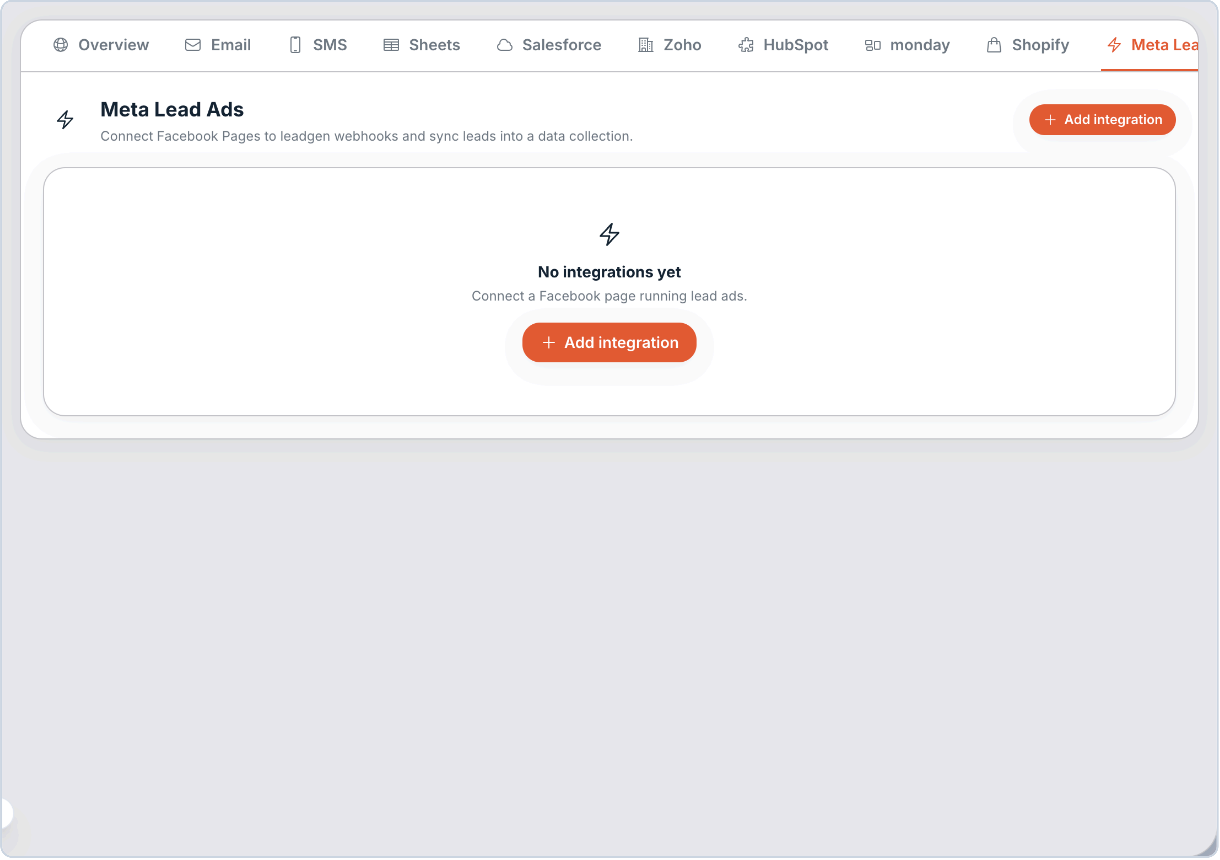
Manual integrations add **Validate** (which verifies the credentials and fetches scopes), **Edit**, and **Delete**. After creating one, validate it before wiring anything to it.

A store that has been through a GDPR redaction shows **Store data redacted** as a tombstone rather than disappearing.

Deleting warns that *Workflow nodes and pipelines using it will need to be re-linked.*

See FloGPT for Shopify for the storefront widget, catalogue sync, and the in-conversation Shopify tools.

Meta Lead Ads



Integrations → Meta Lead Ads.

Connect Facebook Pages to leadgen webhooks and sync leads into a data collection.

Connecting a Page

Field	Notes
Name	*e.g. Flogpt Lead Ads*
User Access Token	*Pages and forms will load automatically after entering a valid token.*
Facebook Page	Loaded from the token
Lead Form	Loaded from the page

The form checks the token's **Required permissions** for you: `pages_show_list`, `business_management`, `leads_retrieval`, `pages_read_engagement`, `pages_manage_metadata`, `pages_manage_ads`. Missing any and it says so — *Some* *permissions are missing. Re-generate your token in Meta App Dashboard with all required scopes.* Generate the token with all six from the outset; adding them later means a new token.

Then choose where leads land — **Use existing** data collection or **Create new** (*A new collection with name, email, and phone columns will be created automatically*) — and optionally map **Phone number**, **Email**, and **Full name** to specific columns.

Finishing in Meta

After creating the integration you are shown **Webhook callback URL** and **Verify token** — *Integration created — paste these into your Meta App Dashboard.* The integration does nothing until you do.

Then press **Subscribe page** to attach the page to the leadgen webhook.

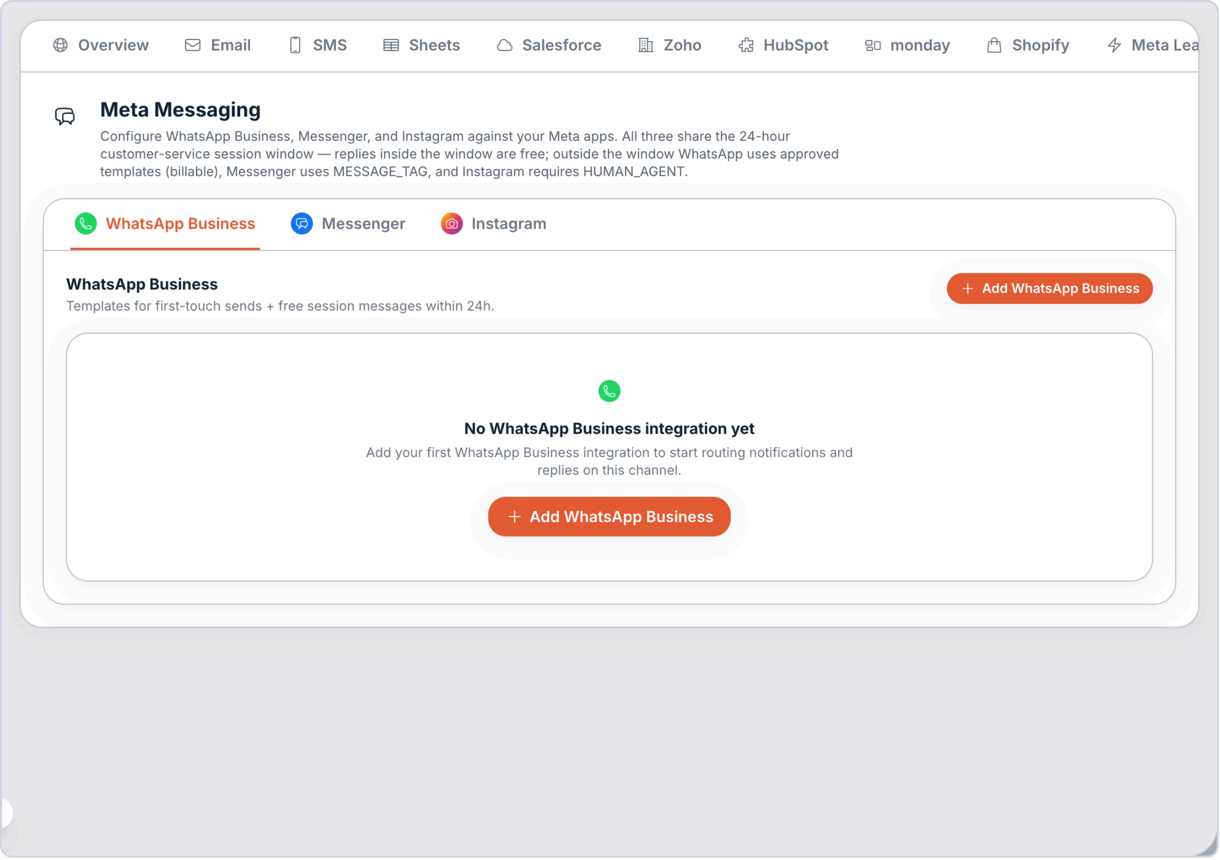
Ongoing lead flow

Leads arrive **inbound** by webhook. **Sync leads** pulls manually and reports *Sync complete — {added} added, {skipped} skipped*. Cards show leads ingested and the last lead time.

Watch the token pills: **Token expiring soon** and **Token expired** appear ahead of and after expiry. An expired token silently stops lead capture, which is an expensive thing to notice late. **Rotate token** regenerates the verify token — remember to update Meta afterwards.

Leads captured here can fire outbound calls; see AI Calls.

Meta Messaging



Integrations → Meta Messaging.

Configure WhatsApp Business, Messenger, and Instagram against your Meta apps. All three share the 24-hour customer-service session window — replies inside the window are free; outside the window WhatsApp uses approved templates (billable), Messenger uses MESSAGE_TAG, and Instagram requires HUMAN_AGENT.

Understand that window before configuring anything. Inside 24 hours of the customer's last message you can reply freely. Outside it, each channel has a different, restricted, and in WhatsApp's case billable mechanism.

Sub-tab	Note
WhatsApp Business	*Templates for first-touch sends + free session messages within 24h.*
Messenger	*Free inside the 24h window; outside, re-engage via MESSAGE_TAG.*
Instagram	*Direct messages; outside-window re-engagement requires HUMAN_AGENT.*

WhatsApp Business

Two independent channels:

Channel	Meaning
Outbound — notifications	*Order updates, alerts and template sends*
Inbound — replies	*AI answers customer messages via a chat widget* — requires a **Reply Chat Widget**

Field	Notes
Webhook URL	Read-only, with **Copy** and **Reset**
Phone Number ID *	*e.g., 123456789012345*
Access Token *	From your Meta app
Verify Token *	You invent it; **Generate** creates one. Paste the same value into Meta
Business Account ID (WABA ID)	*optional but required for templates*
API Base URL	Advanced; defaults to the current Graph API

The WABA ID is labelled optional and effectively is not. Without it you cannot sync templates, and without templates you cannot start a conversation or reply outside the 24-hour window at all.

Templates and spend

With a WhatsApp integration in place, a templates panel appears.

Approved Templates — *Authored in Meta Business Manager. Synced from your WABA.* **Sync from Meta** pulls them into a table of **Name**, **Lang**, **Category**, **Status**, **Params**. Templates are written and approved in Meta, not here.

Billing & Spend breaks estimated current-month spend into **Authentication**, **Utility**, **Marketing**, and **Service (free)**, and offers a **Monthly spend cap (USD)** — *Once exceeded, template sends are skipped automatically.*

Set the cap. It is the only thing standing between a misconfigured campaign and an unbounded Meta bill — and note that exceeding it causes sends to be **skipped**, so set it high enough that legitimate traffic survives.

Send a test takes a **Recipient**, a **Template**, and pipe-separated **Parameters** (*John|ORDER123*), and reports the message id and approximate cost.

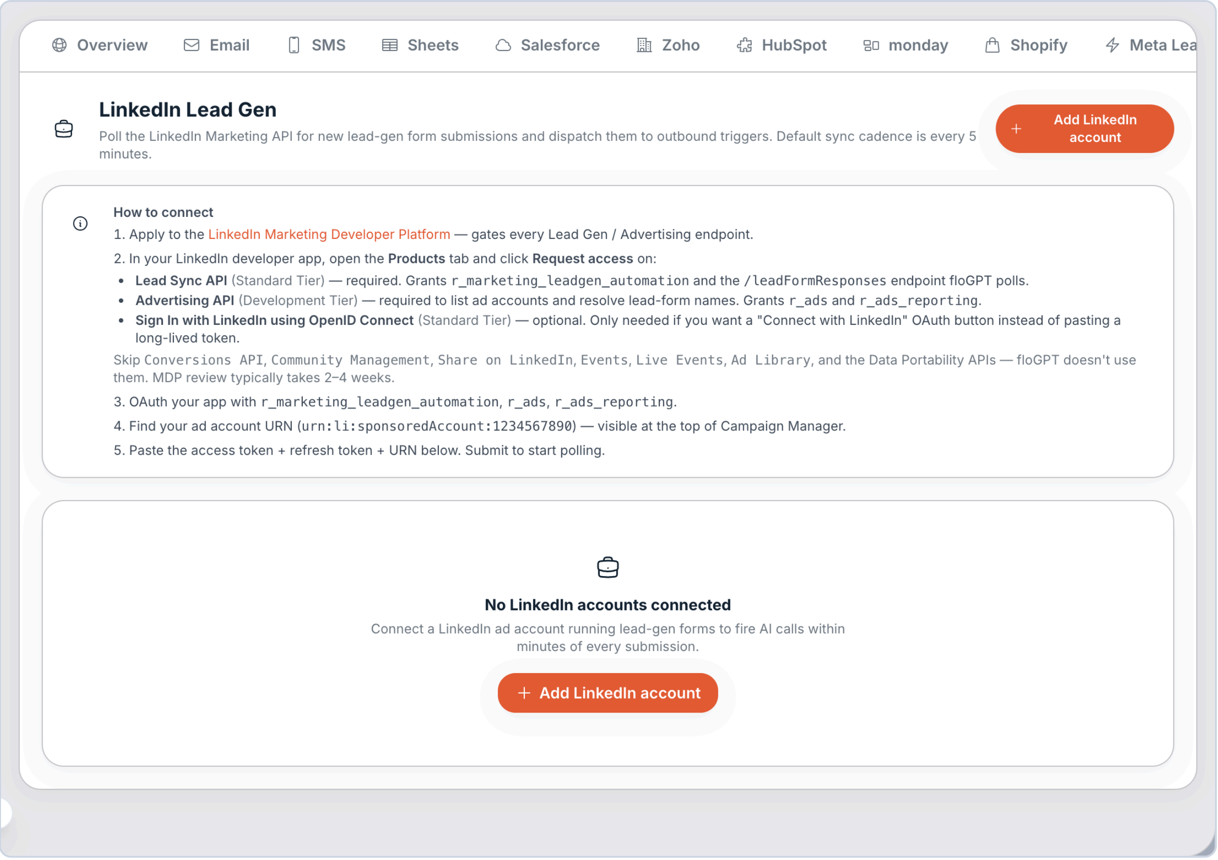
Messenger and Instagram

Channel	Fields
Messenger	**Page ID**, **Page Access Token**, **Verify Token**, read-only **Webhook URL**, **Re-engagement event mappings** (MESSAGE_TAG per event)
Instagram	**Instagram Business Account ID**, **Access Token**, **Verify Token**, read-only **Webhook URL**, **Re-engagement event mappings** (HUMAN_AGENT only)

Both need the webhook URL and verify token pasted into **Meta App Dashboard → Webhooks**.

Each integration also has **Enable auto-reply** and **Enable notifications**, and cards report **Sent**, **Received**, and **Failed** with **Deactivate**, **Activate**, **Sync**, **Test**, **Edit**, and **Delete**.

LinkedIn Lead Gen



Integrations → LinkedIn Lead Gen.

Poll the LinkedIn Marketing API for new lead-gen form submissions and dispatch them to outbound triggers. Default sync cadence is every 5 minutes.

The prerequisite

This one has a real barrier before any configuration. You must be approved on LinkedIn's **Marketing Developer Platform** with access to the **Lead Sync API** and the **Advertising API** (optionally **Sign In with LinkedIn using OpenID Connect**). That approval process takes weeks. Start it before planning around this integration.

Connecting an account

Field	Notes
Name	*e.g. Acme B2B Demo Account*
Organisation URN	*urn:li:sponsoredAccount:1234567890 — From Campaign Manager. The full URN, including the urn:li: prefix.*
Organisation name	Optional, for display
Access token	*OAuth access token with leadgen + reporting scopes. Encrypted at rest.*
Refresh token (optional — enables auto-renewal)	Supply it
API version	Defaults to `202403`

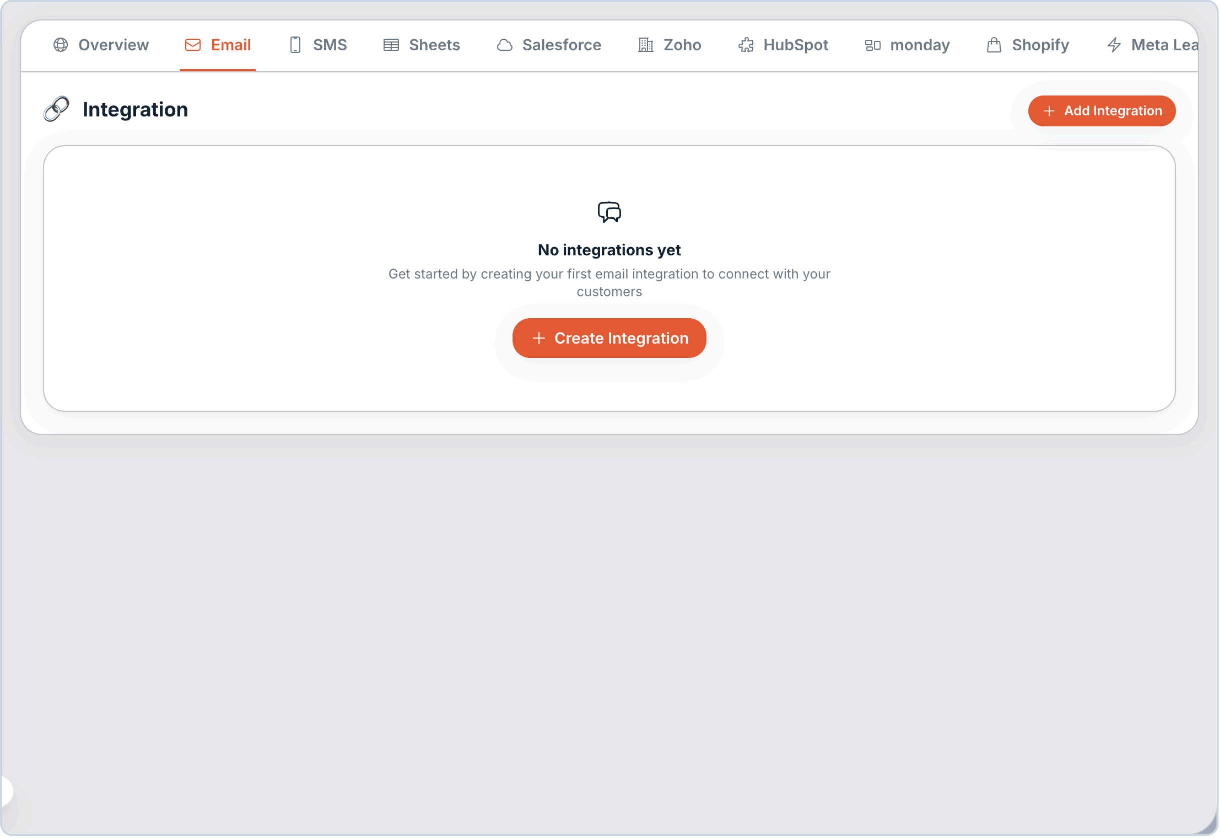
Supply the refresh token. Without it the access token expires and lead capture stops until someone notices.

Ongoing polling

A cron polls every 5 minutes; **Sync now** runs it immediately. Cards show **Total leads ingested**, **Subscribed forms**, **API version**, **Last sync**, and token expiry, with pills for **Token missing** and **Refresh missing**.

Leads feed the outbound trigger system — see AI Calls — which is how a form submission becomes a phone call within minutes.

Email



Integrations → Email.

Configure SMTP email settings to send emails through workflow nodes.

Direction

Option	Meaning
Outbound (SMTP)	*Send from workflows / replies*
Inbound (IMAP)	*Auto-create tickets from mail*
Both	*One mailbox, both directions*

Quick Setup prefills host and port for **Gmail**, **Outlook**, **Yahoo**, or **Amazon SES**.

SMTP (outbound)

Field	Notes
SMTP Host *	*e.g. smtp.gmail.com*
SMTP Port *	*587 (TLS), 465 (SSL), or 25 (unencrypted)*
SMTP Username *	
SMTP Password *	*For Gmail, use an App Password. Stored encrypted and never shown again.*
From Email *	
From Name	

Use an app password, not your account password — with 2FA on the mailbox, the account password will simply fail.

IMAP (inbound)

The poller checks UNSEEN messages in INBOX and converts each one into a CRM ticket...

Field	Notes
IMAP Host *	*e.g. imap.gmail.com*
IMAP Port *	*993 (SSL) is standard*
IMAP Username *	*Usually the same as your support mailbox address*
IMAP Password *	
Poll Interval (seconds)	*Minimum 10s. Gmail recommends ≥ 30s.*
Use SSL/TLS (recommended)	

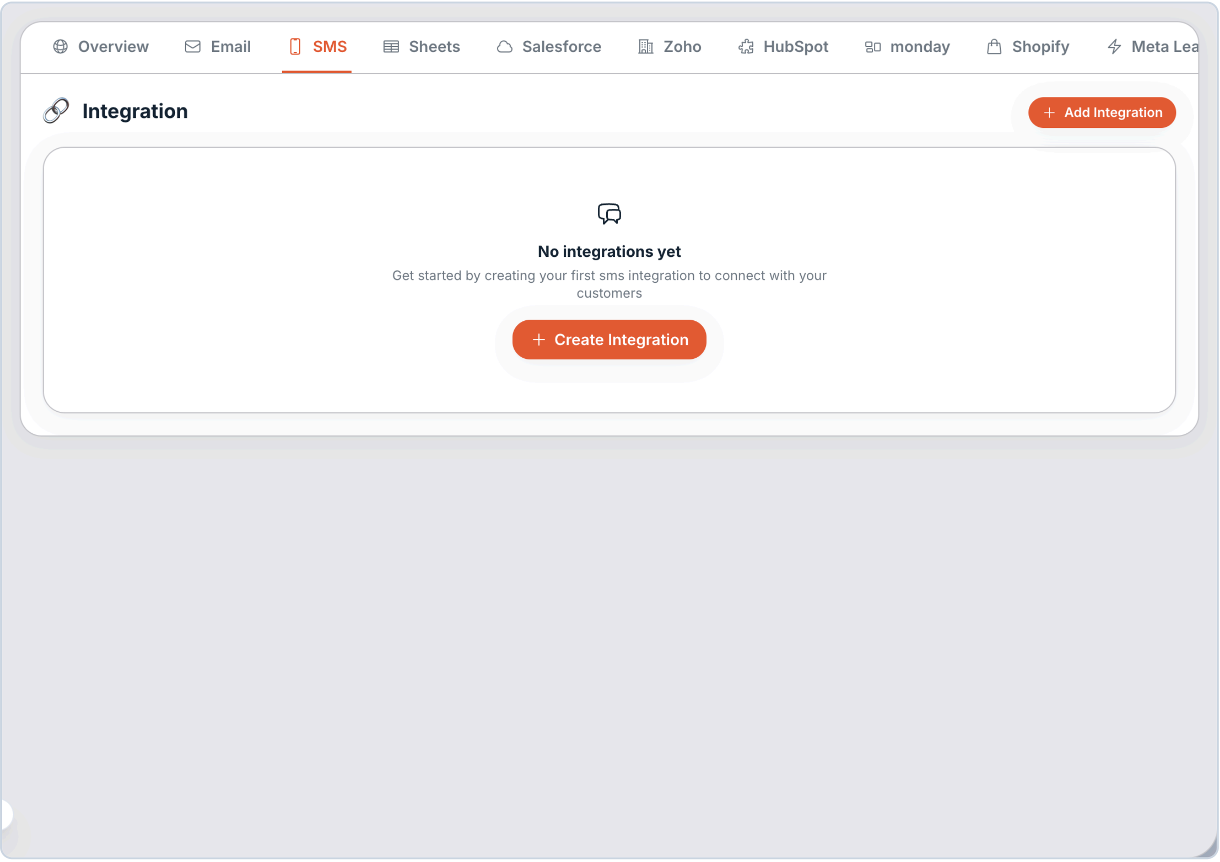
Because the poller acts on **UNSEEN** messages in **INBOX**, anything else reading that mailbox and marking mail as read will cause tickets to be missed. Give FloGPT its own mailbox, or a dedicated folder-free support address.

Whether inbound mail actually creates tickets is also governed by the **Email** channel in Support → Settings.

Test Connection verifies before you rely on it. **Test** sends a real message to an address you supply.

Where the organization is Shopify-managed and has an outbound email integration, an **Email Notifications** panel appears for Shopify order notifications — *Email your customers as their order progresses.*

SMS



Integrations → SMS.

Send and receive SMS on your phone numbers — used by workflow nodes, in-call tools, outbound triggers, and CRM ticket replies.

Field	Notes
Direction *	**Outbound** (*Send only*), **Inbound** (*Auto-create CRM tickets from replies*), **Both**
From Number *	A Telnyx number already on your workspace

There is no API key here — *The platform key authenticates send + receive — no API key required here.*

The prerequisite is a number: *Buy a Telnyx number under Calls → Phone Numbers first, then return here to wire it up for SMS.* With none bought you see **No Telnyx numbers available**. Indian numbers are routed through MSG91 automatically.

Test prompts for an E.164 recipient — *e.g. +1234567890*.

Spend and delivery are reported in Dashboard → SMS.

Troubleshooting

Symptom	Usual cause
Sheets, CRM, or Shopify missing from Overview	Overview only cards the five messaging and email platforms — use the tabs
Telegram, Slack, or Discord in a dropdown	Not implemented; ignore them
Calendar sync says permission missing	The Google or Microsoft account was connected without calendar scope — disconnect and reconnect
· **Refresh token missing** on an account	The connection cannot renew; reconnect it
CRM sync silently stopped	Check **Last error** on the account card, and whether the refresh token is present
monday creates nothing	**Ticket board id** / **Contact board id** not set
Internal notes visible to more people than expected	**Mirror private notes as comments** is on
A Shopify action is missing from a workflow node	Check **Granted scopes** and **Available actions** on the store card
Manual Shopify integration not working	Press **Validate** to verify credentials and fetch scopes
No Meta leads arriving	Webhook URL and verify token not pasted into Meta, or **Subscribe page** never pressed
Meta leads stopped arriving	The user access token expired — watch the **Token expiring soon** pill
Cannot sync WhatsApp templates	**Business Account ID (WABA ID)** is missing
WhatsApp template sends being skipped	The **Monthly spend cap** was exceeded
Cannot message a customer at all	You are outside Meta's 24-hour window and have no approved template

Symptom	Usual cause
LinkedIn connection rejected	Marketing Developer Platform approval for Lead Sync and Advertising APIs is required
LinkedIn leads stopped	No refresh token, so the access token expired
Gmail SMTP authentication fails	Use an App Password, not the account password
Inbound email creates no tickets	Another client is marking mail read, or the **Email** channel is paused in Support → Settings
SMS **From Number** list empty	Buy a Telnyx number under Calls → Phone Numbers first

Related

- Integrations quick start
- Support — which channels create tickets
- Data — spreadsheet sync and calendars using Sheets accounts
- Chat — workflow nodes that call these integrations
- AI Calls — outbound triggers fired by lead sources
- Insights — SMS volume and spend
- Setup — WhatsApp and Teams as alert channels
- FloGPT for Shopify

COMPLETE MANUAL · SECTION 11

Setup

Profile, organization policies, security, API keys, billing, usage, and referrals.

Dashboard sidebar: Setup

Who can see this: Always visible; Organization, Reports, and Escalation are owner-only, and API keys and billing are owner or admin.

Complete reference for the **Setup** section — profile, organization policies, notifications, security, API keys, usage, billing, and referrals.

The section is always visible in the sidebar, but its pages are gated individually and not uniformly. See Who can open what first.

For the fast path, use the Quick Start.

Section map

Sidebar page	Path	What it covers
Profile	`/settings/profile`	Your name and avatar
Organization	`/settings/organization`	Org-wide policy: timezone, retention, PII, business hours
Reports	`/settings/reports`	Scheduled operational reports
Escalation	`/settings/escalation`	Idle-time rules for chats and tickets
Notifications	`/settings/notifications`	In-app inbox, alert preferences, customer notification history
Security	`/settings/security`	Password, 2FA, org 2FA policy
API Keys	`/settings/api-keys`	REST API keys, scopes, and request logs
Usage History	`/settings/usage-history`	Consumption per billing period, invoices
Subscription	`/subscription`	Plan, limits, upgrade, cancel
Payment Methods	`/payment-methods`	Saved cards
Referrals	`/referrals/links`	Referral links and payout account
Referral Earnings	`/referrals/earnings`	Conversions and payout history

Who can open what

Page	Visible to
Profile, **Notifications**, **Security**	Everyone
Organization	**Owner** (or a user with no organization yet)
Reports, **Escalation**	**Owner only**
API Keys	Owner or admin
Subscription, **Payment Methods**, **Referrals**, **Referral Earnings**	Everyone except agents and supervisors
Usage History	Anyone with an organization

That table is the **default** for each role. An owner can tighten it per role under **Users → Permissions**, documented in Member permissions — never loosen it, so a page absent above cannot be opened by policy.

Two clarifications worth stating plainly, because they are commonly assumed otherwise:

Organization, Reports, and Escalation are owner-only, not owner-or-admin. An admin cannot change the organization timezone or the escalation rules.

Team management is not on the Organization page. Inviting and managing people happens in the sidebar's **Users** section — the **Admins**, **Agents**, and **Supervisors** pages — documented in Support.

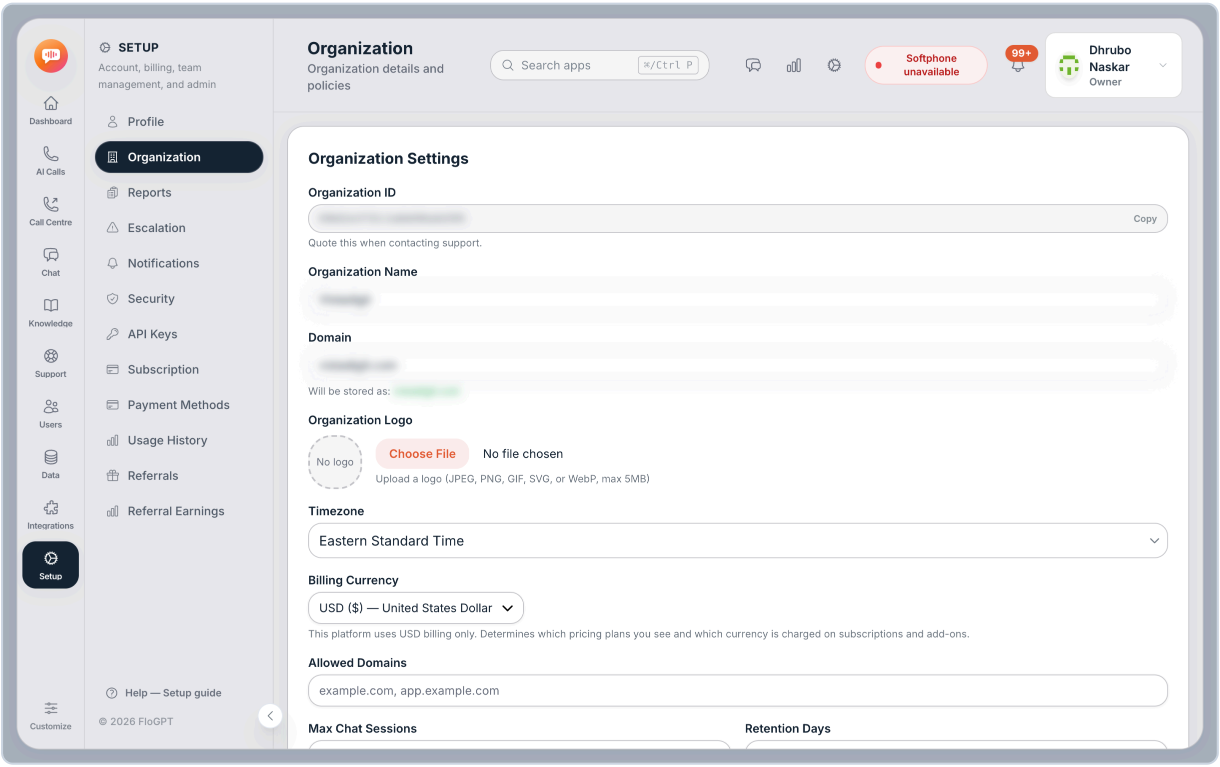
The settings pages have no in-page role check of their own. Gating is by sidebar visibility plus server-side authorisation on save, so a directly pasted URL may render a page your role cannot actually act on.

Profile

Field	Notes
First Name	1–50 characters
Last Name	1–50 characters
Profile Picture	**Update via URL** or **Direct Upload**

Update Profile saves. Your first name is what the dashboard greeting uses.

Organization



Setup → Organization.

Owner only. With no organization yet, this page becomes **Create Organization** instead, asking for an **Organization Name** and **Domain**.

Identity

Field	Notes
Organization ID	Read-only with a copy button — *Quote this when contacting support.*
Organization Name	Free text
Domain	Normalised on save; the page previews *Will be stored as: ...*
Organization Logo	JPEG, PNG, GIF, SVG, or WebP, max 5MB, with **Remove**

Timezone

Timezone defaults to your browser's zone and defines your organization's local day.

This single field has effects across the product: scheduled reports and escalation alerts fire relative to it, and **Dashboard → Call Centre** counts its days in it while every other analytics page uses UTC. If a colleague reports that a scheduled report arrives at an odd hour, check here first.

Billing currency

Billing Currency determines which pricing plans you are shown and what currency subscriptions and add-ons are charged in.

It locks once a paid subscription is active — *Locked because this organization has an active subscription. Cancel the current subscription before changing currency.* On single-currency deployments it is fixed by the platform and cannot be changed at all.

Limits and policy

Field	Range	What it does
Allowed Domains	Comma-separated	Domains permitted for the organization
Max Chat Sessions	0–10000	Cap on concurrent chat sessions
Retention Days	0–90	How long transcripts are retained
Enable Analytics	Toggle	Whether analytics are collected

Transcript PII Redaction

Scrub email, phone, credit card, SSN, IP, and street address from chat and call transcripts before they reach LLM enrichment, dashboard responses, and post-call trigger matching. Raw transcripts remain in storage until your retention window expires.

Control	Notes
Enable PII Redaction	Master toggle
Entity types to scrub	`email`, `phone`, `credit_card`, `ssn`, `ipv4`, `street_address`
Persist a redacted copy	Keeps the redacted version alongside the raw transcript

Leaving every entity unticked uses the default set of all six — an empty selection is not "scrub nothing".

Read the second sentence of that description carefully: redaction governs what reaches the AI, the dashboard, and trigger matching. It does **not** delete the raw transcript, which persists until retention expires. For a compliance story you generally want redaction on, the redacted copy persisted, and **Retention Days** set deliberately rather than left open.

Support Agent Business Hours

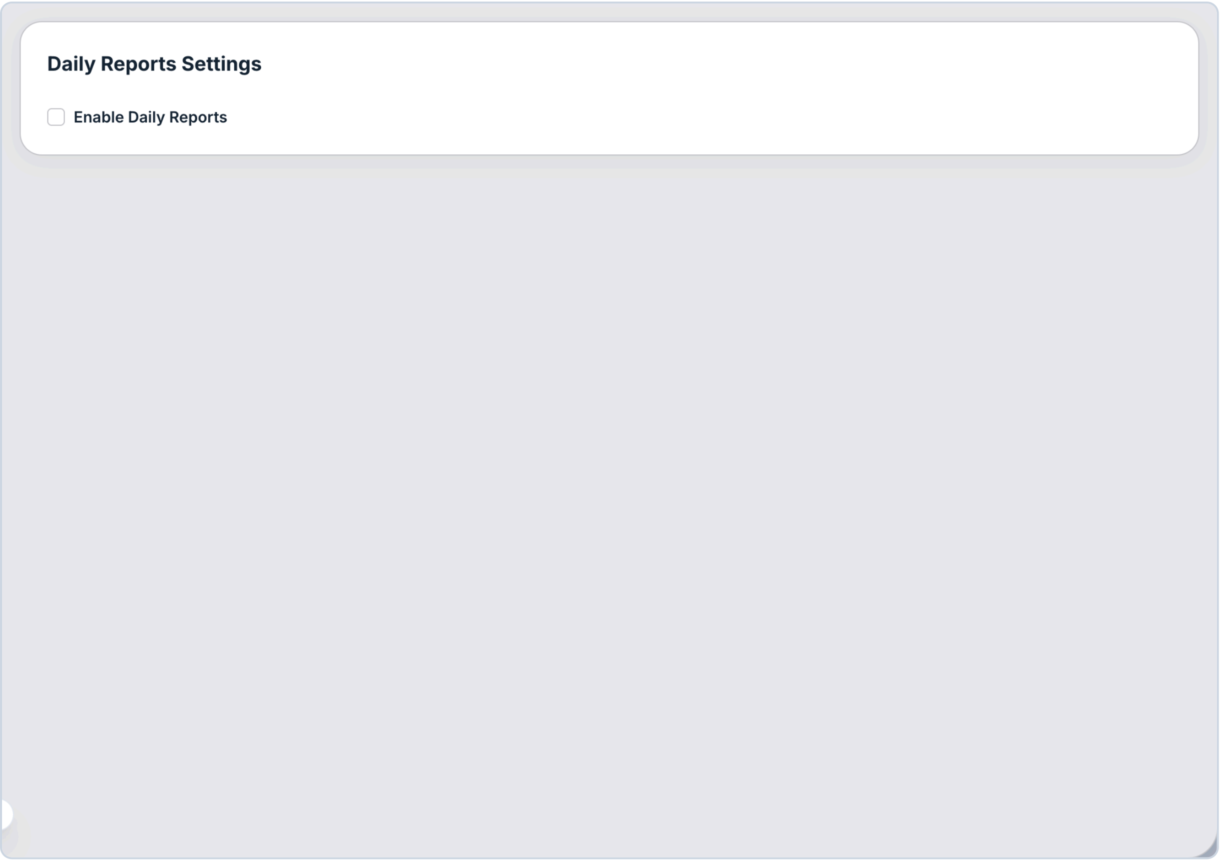
Set working days and hours for agent availability. Outside these hours, support requests will stay pending.

Tick **Enable Business Hours Restriction**, then set slots per day with **From** and **To** times and **Add Slot** for split shifts. Days with no slots show *Day off — not available*.

The consequence is the part to internalise: outside these hours a customer asking for a human is told nobody is available and their request **stays pending** rather than being dropped. It waits for the next working window. Set these hours honestly — an empty schedule with the toggle on means requests never get picked up.

Update Organization saves everything on the page.

Reports



Setup → Reports.

Owner only. Heading: **Daily Reports Settings** — but the frequency is configurable, so this is really "scheduled reports".

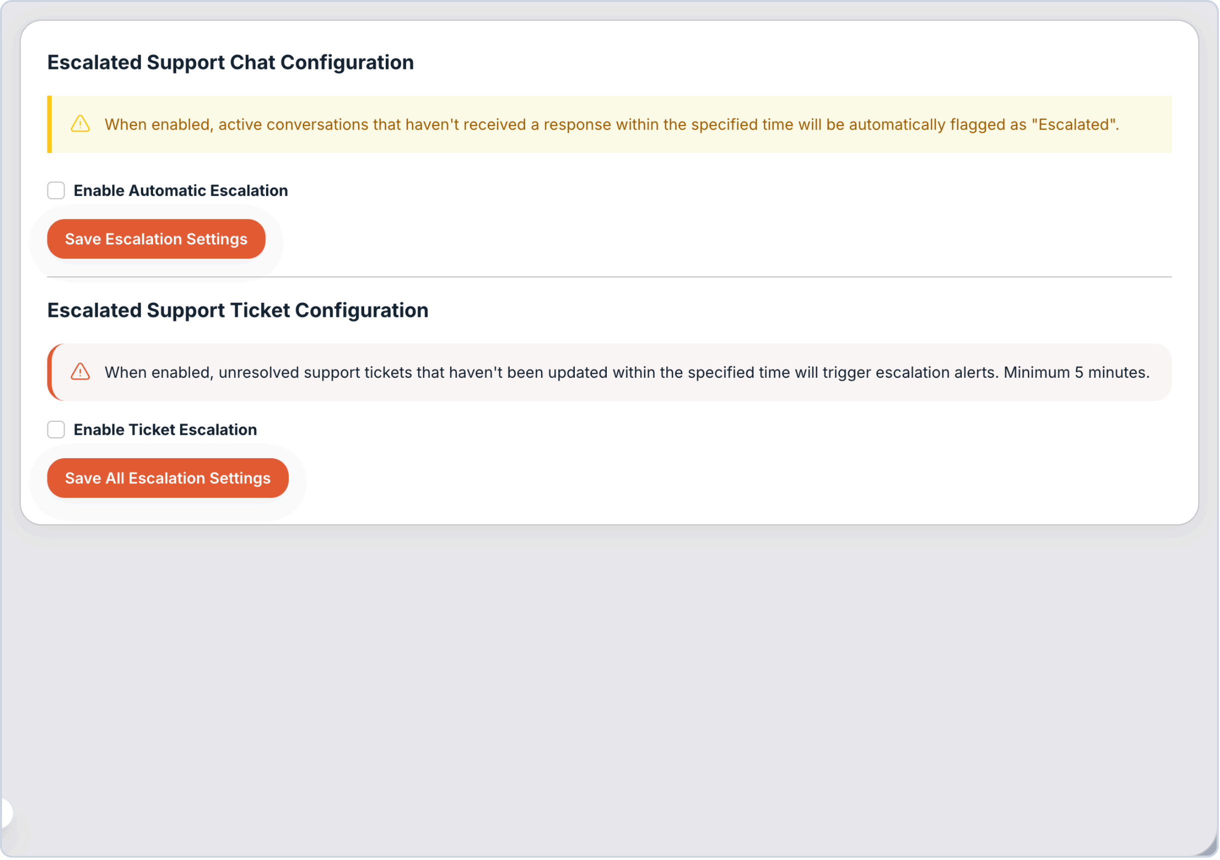
Control	Options
Enable Daily Reports	Toggle; the rest of the form appears only when on
Who should receive daily reports?	**owner**, **supervisor**, **Agents**
Delivery Medium (Select one or more)	**Email**, **WhatsApp Group**, **Microsoft Teams**
Report Frequency	**daily**, **weekly**, **monthly**
Schedule Time	Defaults to `09:00`, in the organization timezone

Choosing WhatsApp reveals **WhatsApp Group ID** (WhatsApp credentials themselves are server-side configuration). Choosing Teams reveals **Teams Webhook URL** — *Create an incoming webhook in your Teams channel and paste the URL here*.

Recipients are chosen **by role, not by person**. Selecting **Agents** sends to every agent.

This toggle also governs the emailed monthly insights write-up described in Insights — a workspace with reports disabled never receives it.

Escalation



Setup → Escalation.

Owner only. Two independent rule sets on one page, each with its own toggle, timings, and notification settings.

Escalated Support Chat Configuration

When enabled, active conversations that haven't received a response within the specified time will be automatically flagged as "Escalated".

Field	Range
Enable Automatic Escalation	Toggle
Idle Time (Hours)	0–720
Idle Time (Minutes)	0–59, default 5
Escalation Notification Method	**Email**, **WhatsApp Group**, **Microsoft Teams**
Who should receive escalation emails?	owner, supervisor, agents

Escalated Support Ticket Configuration

When enabled, unresolved support tickets that haven't been updated within the specified time will trigger escalation alerts. Minimum 5 minutes.

Same shape, applied to ticket inactivity rather than chat silence, with a hard floor of 5 minutes total.

Save All Escalation Settings commits both.

What this is and is not: escalation here **flags and alerts**. It marks a conversation *Escalated* so it surfaces in the Support inbox filters and pings the people you nominated. It does not itself move a conversation to a specific person — that is the **Human Handoff** workflow node and the assignment controls in Support.

Notifications

Open to everyone. Three tabs.

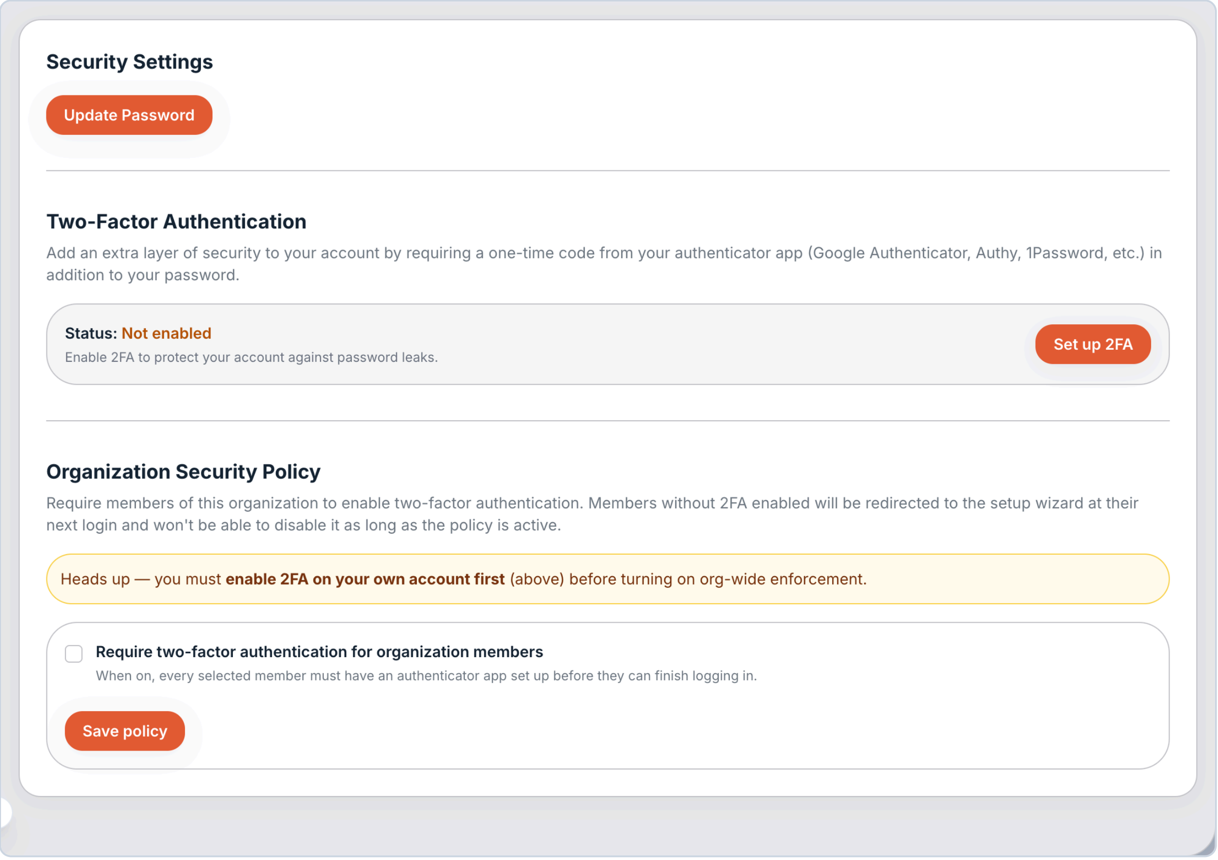
Tab	Contents
Inbox	Your in-app notification feed
Preferences	Which events notify you
History	Customer notification history

Preferences is headed **Alert Preferences** — *Choose which floGPT events notify you and your team on WhatsApp — escalations, tickets, CRM activity, and daily reports. More channels (email, in-app) are coming.*

Delivery here is **WhatsApp only** today. Without a connected WhatsApp Business account you get *No WhatsApp Business account connected* and a link to **Integrations → Meta Messaging**. Connect that first — see Integrations.

History shows *Shopify order notifications sent to your customers over WhatsApp and email* — outbound customer messaging, not your own alerts.

Security



Setup → Security.

Open to everyone; the third panel is owner-editable only. Three panels stacked.

Password

Update Password reveals **Change Password** with **Old Password**, **New Password**, and **Confirm New Password**.

The enforced rule: *Password must be at least 8 characters long and contain at least one uppercase letter, one lowercase letter, and one number.* This rule is fixed — there is no configurable complexity policy.

Two-Factor Authentication

Add an extra layer of security to your account by requiring a one-time code from your authenticator app (Google Authenticator, Authy, 1Password, etc.) in addition to your password.

Setup is a two-step wizard: **Step 1 — Scan the QR code** (with a manual-entry code as a fallback) and **Step 2 — Enter the 6-digit code**.

You are then shown recovery codes under the heading *Save your recovery codes — this is the only time you'll see them*, with **Download codes (.txt)** and **Copy to clipboard**. Each code works **exactly once**. Store them in a password manager before closing that panel.

Once enabled the panel reports *You have {n} unused recovery codes left*, and offers **Regenerate recovery codes** (which invalidates the old set and needs a current 6-digit code) and **Disable 2FA** (which needs your account password).

Organization Security Policy

Owner-editable; others see a read-only **Organization 2FA policy** summary.

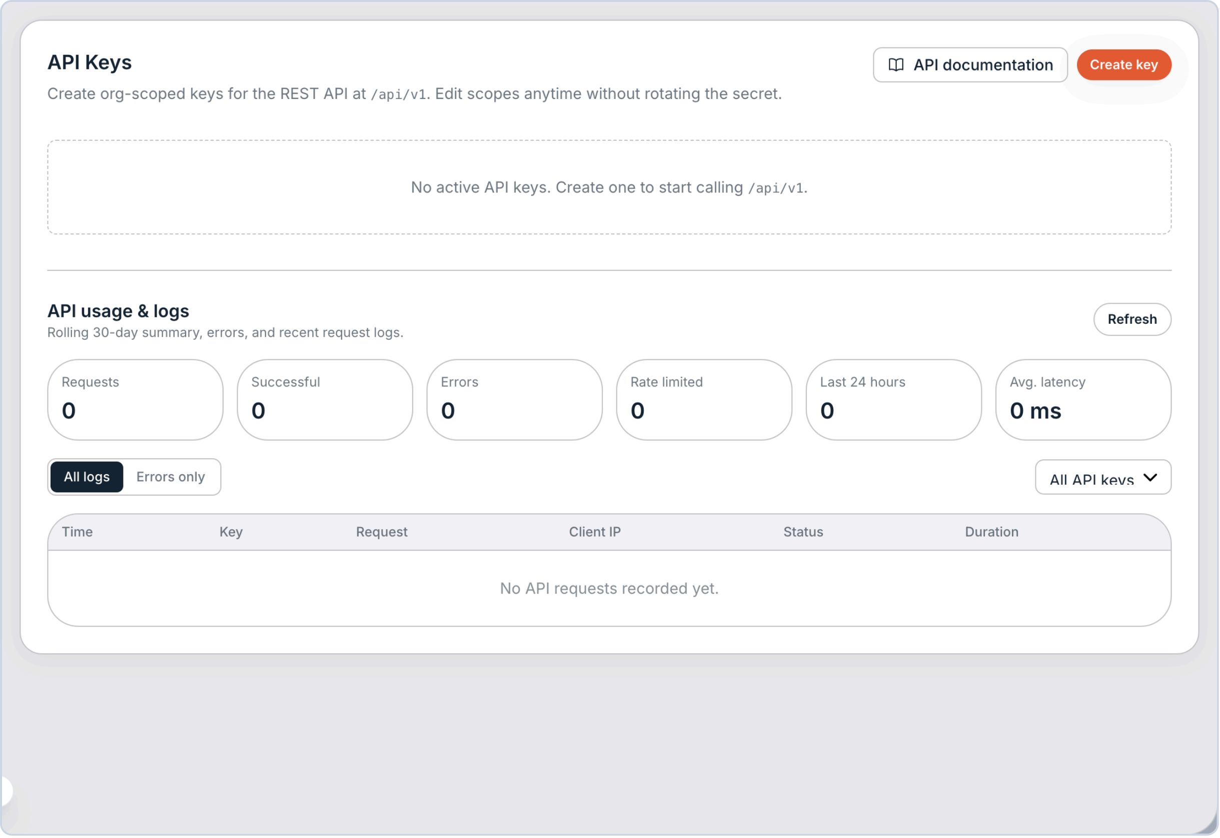
Require members of this organization to enable two-factor authentication. Members without 2FA enabled will be redirected to the setup wizard at their next login and won't be able to disable it as long as the policy is active.

Apply to is either all members or a chosen set of **Owners**, **Admins**, **Supervisors**, **Agents**, **Editors**, **Viewers**. Leaving every role unticked requires 2FA from everyone.

You must have 2FA on your own account first — otherwise: *Heads up — you must enable 2FA on your own account first (above) before turning on org-wide enforcement.*

There is no SSO, no SAML, and no session or idle-timeout policy. If your security review asks for those, this page is the complete answer and the answer is no.

API Keys



Setup → API Keys.

Owner or admin. Others see *Only organization owners and admins can manage API keys.* An owner can also close it to admins via Member permissions, in which case they see *The owner has removed your access to this organization's API keys.* Revoking only *Create and revoke API keys* leaves the list and its logs readable without the **Create key**, **Edit scopes**, and **Revoke** controls.

Create org-scoped keys for the REST API at /api/v1. Edit scopes anytime without rotating the secret. An **API documentation** button links to the API reference.

Creating and managing a key

Create key asks for a **Name** and at least one **Scope** — *Name and at least one scope are required.*

The dialog then flips to **Save your API key** with *Copy this key now. It will not be shown again.* Afterwards the list shows only a masked `prefix…last4`.

Action	Behaviour
Edit scopes	*Changing scopes takes effect immediately for subsequent requests. The secret itself is unchanged.*
Revoke	*Revoke this API key? This cannot be undone.*

There is no rotation. To replace a key you revoke and create a new one, which means a brief overlap has to be managed on your side — create the new key first, migrate, then revoke the old one.

Each row shows the name, masked key, scopes, and **Last used**, which is the quickest way to find a key nothing is calling any more.

Scopes

Read and write are separate, per area: **Chat widgets**, **Call widgets**, **Knowledge bases**, **CRM**, **Conversations**, **Call logs** (write is *manual reinitiate* only), **Analytics** (read only), **Meta Lead Ads integrations**, **Outbound triggers**, **Data collections**, and **Email integrations**.

Grant read where you only need read. Scopes are editable later, so starting narrow costs nothing.

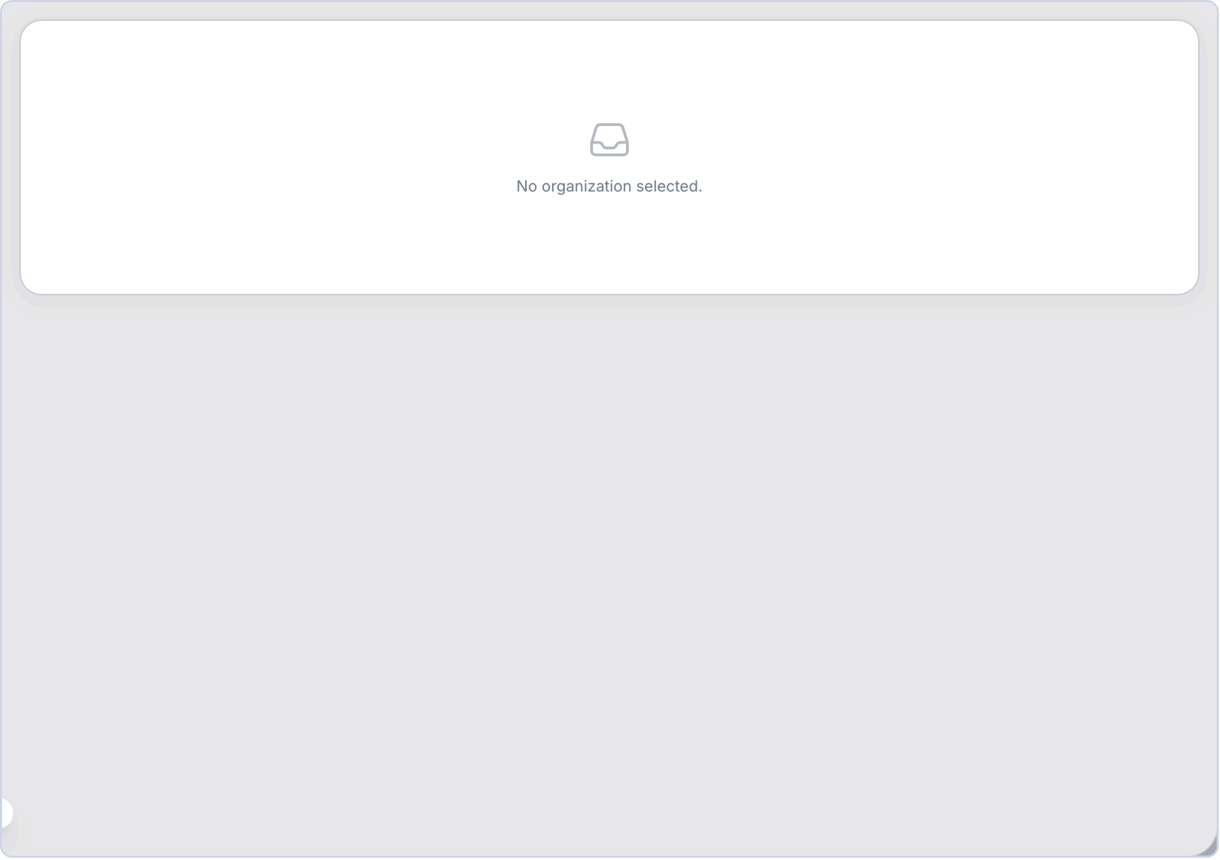
Usage and logs

API usage & logs — *Rolling 30-day summary, errors, and recent request logs*, with **Refresh**.

Metrics: **Requests**, **Successful**, **Errors**, **Rate limited**, **Last 24 hours**, **Avg. latency**.

Log table: **Time**, **Key**, **Request**, **Client IP**, **Status**, **Duration**, filterable to **All logs** or **Errors only** and by key. Empty: *No API errors recorded for this filter. | No API requests recorded yet.*

Usage History



Setup → Usage History.

Anyone with an organization. **Subscription Usage History** — *Billing period breakdown of token and message consumption.*

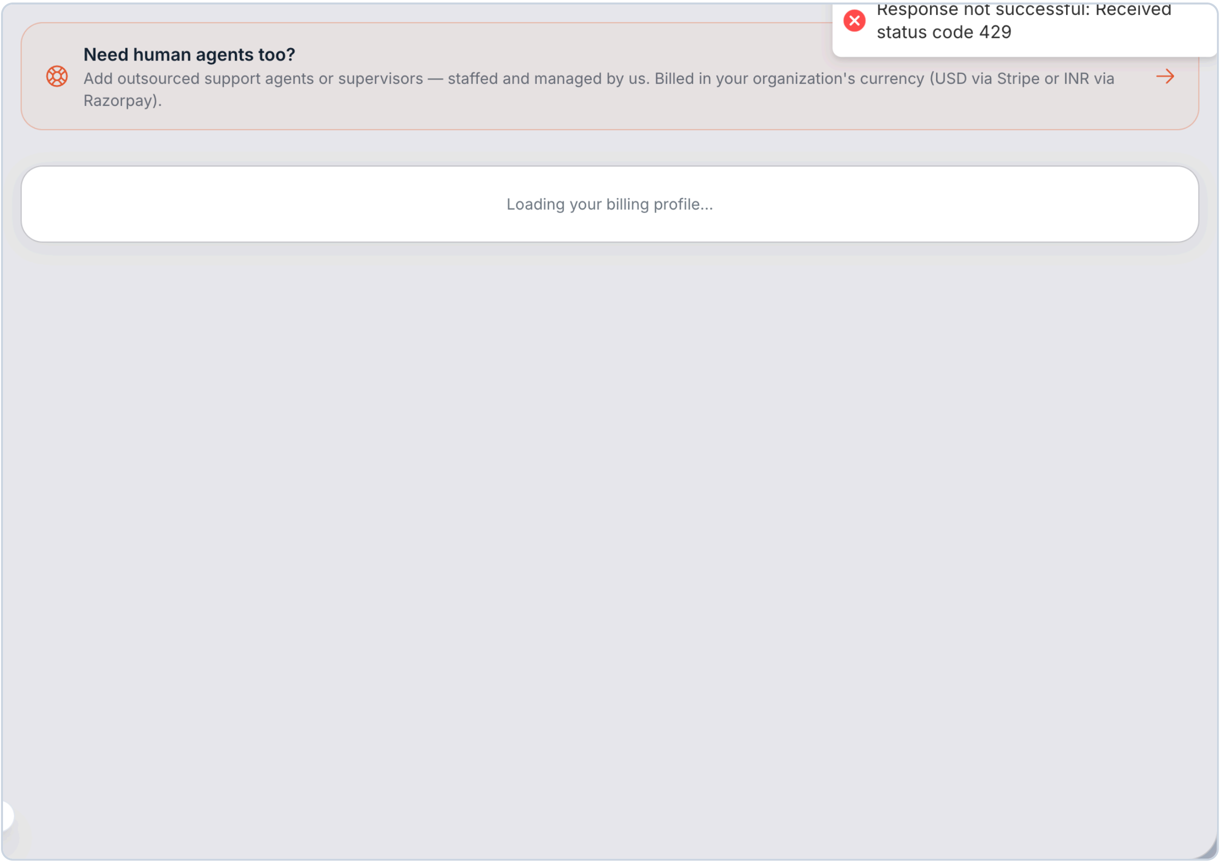
Summary cards: **Latest Period**, **LLM Tokens Used**, **Messages Sent**.

Table: **Billing Period**, **LLM Tokens**, **Messages**, **Last Updated**, **Invoice**. The active period is badged **Current**, and the invoice column offers **Download PDF** where an invoice exists.

This page shows **consumption, not limits**. For usage against your plan's allowances, use the **Usage Statistics** panel on Subscription.

Empty: **No usage history yet** — *Usage data will appear here once your subscription is active.*

Subscription



Subscription, with Usage Statistics.

Hidden from agents and supervisors.

Current plan

Current Plan with a status pill (**active**, **trialing**, **past_due**, **canceled**), a **Billed via Shopify** pill where applicable, and **Annual billing** / **Monthly billing**.

Details: **Period Start**, **Period End**, **Next Billing**. **Trial ends on {date}** appears while a trial is running, and **Subscription will cancel on {date}** after you cancel.

Choosing a plan

Choose Your Plan — *Select the plan that fits your needs.* A currency toggle (**USD**, **INR**, **EUR**, subject to the lock described above) and a **Monthly** / **Yearly** switch sit above the grid.

Plan cards show the price, a **Save X%** pill on annual, the feature list with each limit (or **Unlimited**), and pills for **Most Popular** and **Current Plan**. Plans and their limits are defined by the platform, so what you see depends on your billing currency.

Upgrading or downgrading means picking another card and completing the payment dialog; proration is handled for you. Cancelling is at period end — *You'll continue to have access until the end of your billing period. This action can be reversed by resubscribing.*

Some plans carry a one-time **setup fee** (**Chat setup**, **Call setup**), shown in the payment dialog and skipped if already paid.

Usage Statistics

Your consumption against the active plan's limits. Bars for **LLM Tokens**, **Messages**, **Chat Widgets**, **Workflows**, **Knowledge Bases**, and **Data Collections**, each showing used against limit, or **Unlimited**.

This is the panel to check before a launch. Hitting a widget or workflow limit fails at creation time, which is a bad thing to discover mid-campaign.

Shopify billing

If FloGPT was installed through Shopify, this page replaces the plan grid, billing portal, and card dialog with **Billing is managed in Shopify** and buttons for **Open Shopify Billing** and **Open Shopify Admin**.

Your plan and your metered add-ons — phone numbers, call minutes, SMS — are charged on your Shopify invoice. Saved cards under **Payment Methods** play no part. See FloGPT for Shopify.

INR subscriptions are completed through Razorpay rather than the inline card form: *You'll be redirected to Razorpay to securely complete your INR subscription.*

Payment Methods

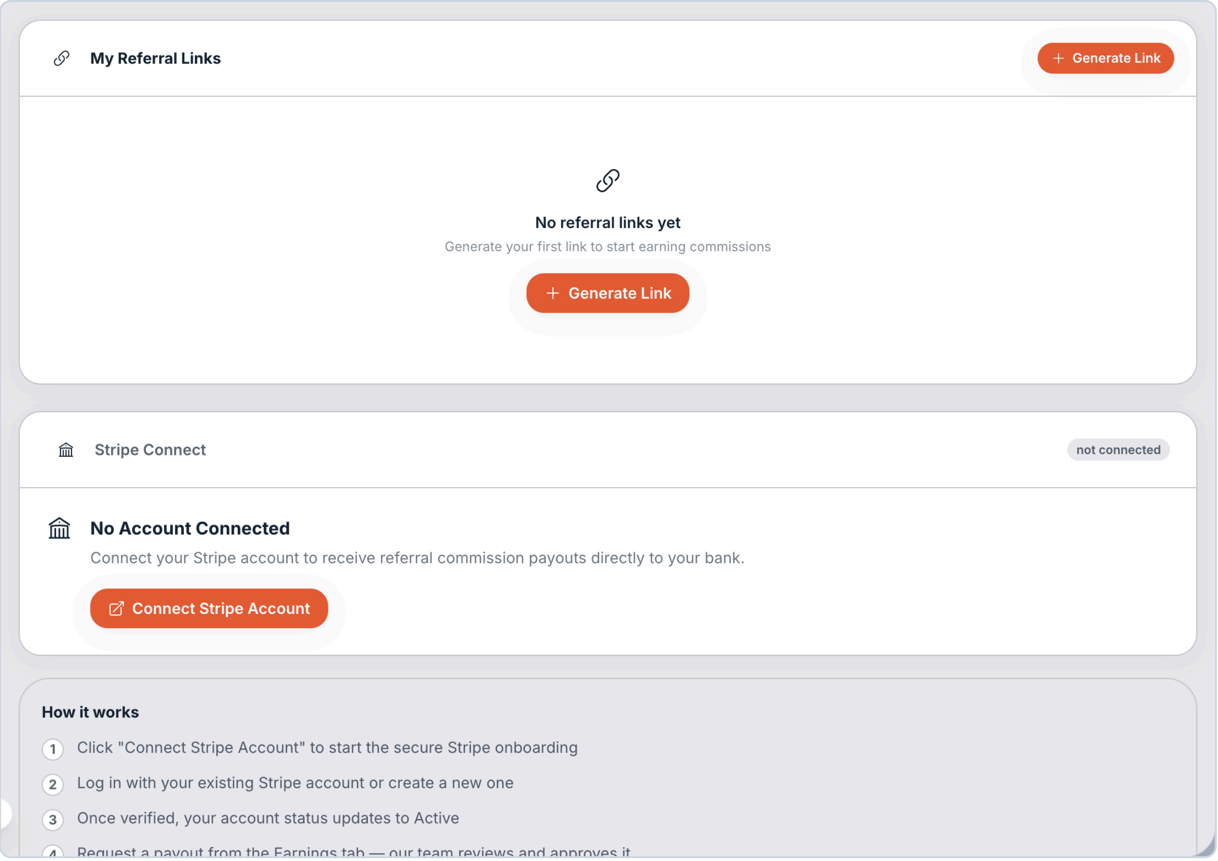
Manage cards saved to your organization. **Add Card** opens **New card details**.

Cards list with brand, last four digits, expiry, and a **Default** badge, with actions to set default or remove.

Deleting a card is blocked while a subscription is active — *Cannot delete a payment method while an active subscription exists*, with the note *Card deletion is disabled while an active subscription is running.* Cancel first, or add a replacement and make it default.

Shopify-billed organizations see *Billed through Shopify — no card needed here.*

Referrals



Referrals → My Referral Links.

Hidden from agents and supervisors. Two tabs.

My Referral Links

Stat cards: **Total Clicks**, **Signups**, **Conversions**, **Total Earnings**, **Pending Payout**.

Generate Link opens **Generate Referral Link**:

Field	Notes
Custom Code (optional)	3–20 characters, letters, numbers, hyphens, underscores. Blank auto-generates
Label (optional)	*A label helps you track which campaign this link belongs to*

The result is a link of the form `/signup?ref={code}`. The table lists **Label / Code**, **Clicks**, **Signups**, **Conversions**, **Earnings**, **Status**, **Actions**, with copy, pause or activate, and delete per row.

Generate a separate link per channel and label it. There is no other way to attribute where a signup came from.

Payouts

Stripe Connect handles payout onboarding. Statuses are **Stripe Account Connected**, **Verification Pending**, **Account Restricted**, and **No Account Connected**, with **Connect Stripe Account**, **Complete on Stripe**, **Refresh Status**, and **Resolve in Stripe Dashboard** as appropriate.

The **Referral Earnings** tab lists **Converted Referrals** with **Referee**, **Link**, **Status**, **Earned**, **Converted**, and an expandable **Payout History** per row showing **Amount**, **Status**, **Transfer ID**, **Requested**, **Paid**, with a rejection reason where one applies.

Two honest caveats. The **commission rate is set by the platform**, not shown or chosen here — you see the resulting earnings only. And although the onboarding copy mentions requesting a payout from the Earnings tab, **there is no self-service request button**: payouts are initiated and approved by the FloGPT team, and this tab is read-only. Contact your account manager to chase one.

Troubleshooting

Symptom	Usual cause
Organization, Reports, or Escalation missing	Those three are owner-only — an admin cannot see them
Cannot find where to invite people	Team management is in the **Users** section — the Admins / Agents / Supervisors pages, not here
Scheduled report arrives at the wrong hour	**Timezone** on the Organization page is wrong
Reports enabled but nothing arrives	Recipients are chosen by role — check a role is ticked and has members
No monthly insights email	Scheduled reports are disabled for the organization
Support requests sit pending overnight	Expected with **Business Hours Restriction** on — they wait for the next window
Business hours on but nobody ever picks up	The schedule has no slots; an empty schedule blocks every hour
PII still visible in stored transcripts	Redaction governs AI, dashboard, and trigger matching; raw transcripts persist until retention expires
Cannot change billing currency	Locked by an active subscription, or fixed by the platform
Cannot delete a card	Blocked while a subscription is active
Lost the API key	It is shown once only; revoke it and create a new one
API returns 403 after a scope change	Scopes apply to subsequent requests only; check the right scope is ticked
Cannot enforce org-wide 2FA	Enable 2FA on your own account first
Looking for SSO or session timeout	Neither exists
Alert preferences say no WhatsApp account	Connect WhatsApp Business under Integrations → Meta Messaging

Symptom	Usual cause
Plan grid missing, Shopify notice instead	The workspace is billed through Shopify
No payout request button	Payouts are team-initiated; the tab is read-only

Related

- Setup quick start
- Start here — first-run setup in order
- Support — team management and where escalations land
- Insights — the scheduled reports and the timezone effect
- Integrations — WhatsApp and Teams delivery channels
- FloGPT for Shopify — Shopify-managed billing