

B Botline

YOUR FIRST AI CONVERSATION

The Complete Botline Launch Manual

Chapter 1 — Sign up at botline.cc

This chapter unlocks: a working Botline account.

Botline runs entirely in the browser. There is no software to install and no server to configure.

- 1 Open <https://botline.cc> and click **Get Started** in the top-right corner. You land on the sign-up page at <https://botline.cc/signup>.
- 2 Enter your **business email**. Use an address you actually check — every notification (including OTP, escalation alerts, and weekly digests) is sent here.
- 3 Click **Send code**. A six-digit one-time code arrives by email within ten seconds. Paste it in. Botline does not ask for a password — every login is OTP-based.
- 4 Enter your **business name** when prompted. This becomes the label customers may see on receipts and broadcast templates. You can change it later under **Settings → Profile**.
- 5 Pick a **plan**. The Free plan is enough to complete this manual. Starter (Pro plan equivalent on the pricing page) unlocks broadcasts, multiple agents, and Draft Review mode. You can upgrade in one click later — pick Free now and decide after you have something working.
- 6 Land on <https://botline.cc/dashboard>. The empty dashboard greets you. Bookmark this URL — it is your home base.

 **See it live:** botline.cc/signup

Note. Botline never stores passwords. If you lose access to your email, contact support@botline.cc — recovery requires manual identity verification.

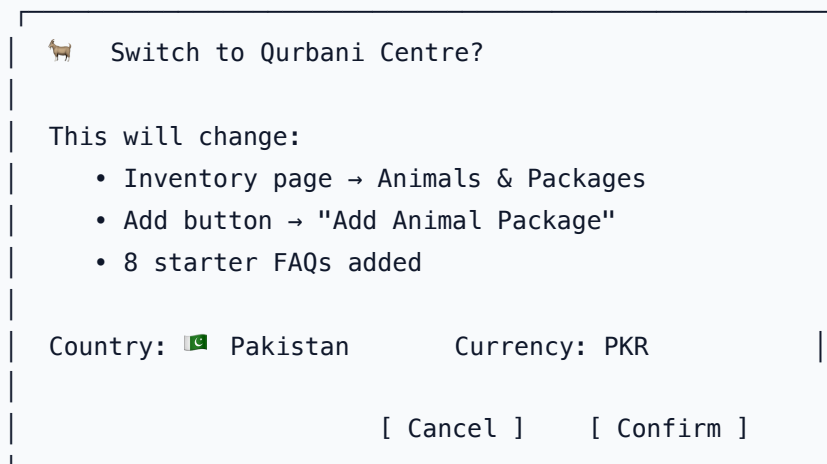
Chapter 2 — Pick your business profile

This chapter unlocks: 80% of your configuration, automatically.

Every business is different — but inside the same vertical, most things are the same. Botline groups businesses into **archetypes**, then under each archetype lists specific **business types**. Picking yours seeds your account with starter FAQs, a greeting menu, broadcast templates, sample products, payment methods, agent profiles, and workflows tuned for your category.

- 1 Open <https://botline.cc/dashboard/onboarding> (or <https://botline.cc/dashboard/settings/business-type>). The picker page lists every supported business type with a flag of your country and a short description.
- 2 Type a keyword in the search bar — for example *qurbani*, *salon*, *clinic*, *bakery*, *boutique*, *real estate*. The list filters live.
- 3 Click your match. A confirmation modal opens listing exactly what will change: which inventory page name appears, which menu items get seeded, how many starter FAQs land in your knowledge base.
- 4 Confirm your **country** and **currency** in the same modal. These are auto-filled from your IP — override if needed.
- 5 Click **Confirm**. Behind the scenes Botline runs the seeding orchestrator: it creates your starter knowledge base, drafts your greeting menu, files broadcast templates with Meta if you are on Cloud API, populates sample products, lists payment methods used in your country, creates the right AI agent profiles, and turns on workflow automations specific to your business.

 See it live: botline.cc/dashboard/onboarding



You can switch later. Picking a profile is not a lock-in — change it any time on the same page. Switching does not delete your existing data; it only re-seeds anything that is missing.

Chapter 3 — Region, currency, timezone

This chapter unlocks: localized timestamps, prices, phone numbers, and language hints.

Even if you serve customers in a single country, set this correctly. Reminders fire at the right local time, prices show with the right symbol, and phone numbers validate against your country's format.

- 1 Open <https://botline.cc/dashboard/settings>. The page has tabs along the top — start with **Profile**.
- 2 Confirm **Country**. The country flag picker auto-fills currency and phone format hints.
- 3 Confirm **Currency**. PKR for Pakistan, INR for India, USD for global, AED for UAE, MYR for Malaysia, and so on.
- 4 Set your **Timezone**. Pakistan is `Asia/Karachi` , India is `Asia/Kolkata` , UAE is `Asia/Dubai` . This drives every reminder, every "good morning" greeting, and every business-hours rule.
- 5 Pick your **primary language**. This is a hint to the AI for default reply style — it does not block customers from messaging in another language. Botline replies in whichever language the customer writes.
- 6 Click **Save** at the bottom-right. Changes apply within seconds.

 **See it live:** botline.cc/dashboard/settings (*Profile tab*)

Why it matters. A 2 PM appointment reminder set at the wrong timezone is a cancelled booking. A price quoted in the wrong currency is a refund request. Set this once, correctly.

Chapter 4 — Build your knowledge base

This chapter unlocks: an AI that actually knows your business.

Your AI agent is only as good as the information you give it. Botline uses a technique called **RAG (Retrieval-Augmented Generation)**: every time a customer asks a question, the system finds the most relevant chunks of your documents and feeds them to the AI as context before it writes a reply. This keeps answers grounded, factual, and on-brand.

- 1 Open <https://botline.cc/dashboard/knowledge-base>. The page has three tabs: **Documents**, **FAQs**, and **Media**.
- 2 Click **+ Add Source** in the **Documents** tab. You have three input methods:
 - **Upload a file** — PDF, DOCX, TXT, or Markdown up to 20MB.
 - **Paste a URL** — Botline crawls the page and extracts text.
 - **Type directly** — for short, hand-written content (returns policy, opening hours, etc).
- 3 Drag a PDF onto the upload area. Botline extracts the text, splits it into chunks, and embeds each chunk for semantic search. Indexing takes 30–90 seconds for documents under 20MB.
- 4 Open the **FAQs** tab. Click **+ Add FAQ**. Each FAQ is a **Q:** and **A:** pair. Aim for at least 20–30 short FAQs — they are higher signal than long PDFs because they exactly mirror customer questions.
- 5 Open the **Media** tab. Upload product photos, service brochures, price-list images, certificates. The AI can attach these in replies when relevant.
- 6 Click each document and toggle **Use for AI** on or off. Documents that are off remain stored but never appear in AI replies — useful for staff-only handbooks.

 See it live: botline.cc/dashboard/knowledge-base

Sample shapes that work well

- **Pricing list:** one PDF with all SKUs, prices, sizes, variants, and any tier-based discounts.
- **FAQs:** at least 20 question-answer pairs covering: what you sell, opening hours, delivery, returns, warranty, payment options, contact info, common edge cases.
- **About page:** one short document describing your business, mission, what makes you different. Two paragraphs is enough.

- **Policies:** one document each for *returns, refunds, cancellations, shipping, privacy*. Customers ask about these constantly.
- **Edge case:** add a short doc titled *Things to never say* — competitor names, internal pricing, anything legally sensitive. The AI is instructed to avoid these.

Chapter 5 — Greeting menu + first-message media

This chapter unlocks: the very first thing every new customer sees.

When a customer messages your WhatsApp number for the first time — or after a long gap — Botline can send a **greeting**: a welcome message, a numbered menu of options, and optionally an image, video, or PDF brochure with a caption. This sets the tone for the conversation and steers the customer to the right path before the AI even gets involved.

The greeting menu

- 1 Open <https://botline.cc/dashboard/whatsapp/menu>.
- 2 Edit the **Welcome message** at the top. One or two short lines. Greet in the customer's most likely language. For Pakistan: Roman Urdu plus English works best.
- 3 Add menu items below. Each item has a **number key** (1, 2, 3...), a **label** customers see, and a **reply** that is sent back when the customer types that number.
 - Example: 1. View Products → bot sends product catalog
 - Example: 2. Track Order → bot prompts for order ID
 - Example: 3. Talk to a Human → escalates to your inbox
- 4 Use the emoji picker on each label to add a relevant emoji — they make menus feel alive on WhatsApp.
- 5 Click **Save**.

First-message media (image, video, PDF, with or without caption)

The greeting menu sends text. To send a banner image or a brochure PDF as the first impression, use the Knowledge Base's *send-on-greeting* flag.

- 1 Open <https://botline.cc/dashboard/knowledge-base> → **Media** tab.
- 2 Upload the asset (banner image, intro video, brochure PDF). Maximum 16MB for images, 64MB for videos, 100MB for PDFs.
- 3 Click the asset, scroll to **Send on greeting**, toggle on.

- 4 (Optional) Set a **caption** — a short line of text shown alongside the media in WhatsApp. Leave blank for a silent attachment.
- 5 Set **display order** — assets with a lower number send first if you have several.
- 6 Save.

The next time any new customer messages, they receive: your media → your welcome text → the numbered menu, in that order.

 See it live: botline.cc/dashboard/whatsapp/menu

What customers see in WhatsApp on first message:

```
[Banner image attached, 1200x630]
  "Welcome to FreshBakes – fresh daily!"

Assalam-o-alaikum! How can we help today?

1 View products
2 Place order
3 Track delivery
4 Talk to a human

Reply with the number of your choice
```

Best practice. One short banner image (1200x630px, under 1MB) plus a one-line caption is the sweet spot. Avoid sending a 50-page PDF as the first contact — customers will not read it and may block your number for spamming.

Chapter 6 — Operating hours & out-of-hours behavior

This chapter unlocks: a bot that does not reply at 3 AM in a way you would not.

Botline can run 24/7, but you may want it to behave differently when your business is closed — for example, replying with “We are closed, we will respond at 9 AM” instead of trying to take an order it cannot fulfil.

- 1 Open <https://botline.cc/dashboard/settings> and click the **Hours** tab.
- 2 Set your **business hours** for each day of the week. Enable **Closed all day** for off days.
- 3 Choose your **out-of-hours behavior**:
 - **AI replies normally** (default) — the bot answers any time, but mentions in its reply that orders are processed during business hours.
 - **AI replies with closed message** — the bot sends one specific message (“We are closed, will respond at 9 AM”) and does nothing else. No menu, no AI reply.
 - **AI silent** — nothing is sent until business hours resume; the message waits in your inbox.
- 4 Customize the **Closed message** text below. One or two lines, friendly, gives an ETA.
- 5 Save.

 **See it live:** botline.cc/dashboard/settings (*Hours tab*)

Pro tip. Combine *AI silent* with a Friday-only schedule for halal certainty in religious businesses — no auto-replies sent during Jummah prayer, manual replies resume after.

Chapter 7 — Connect WhatsApp


This chapter unlocks: the actual channel customers use.


Botline supports two WhatsApp providers:

- **Baileys** (default, recommended for starting) — links your existing WhatsApp number via a QR code. No Meta approval, no business verification, no monthly cost. Works with personal numbers and business numbers alike.
- **Cloud API** (Pro plan, official Meta WhatsApp Business API) — required for broadcast campaigns at scale, official template approvals, and the highest-volume tenants. Approval takes 1–7 days.

Start with Baileys. You can upgrade later — your conversations and contacts carry over.


Connect via Baileys (QR code)

- 1 Open <https://botline.cc/dashboard/whatsapp>.
- 2 Click **+ Add WhatsApp Number**.
- 3 Choose **Baileys (recommended)**. Give the line a label — for example *Sales, Support, or Karachi office*.
- 4 A QR code appears on screen.
- 5 On the phone holding the WhatsApp number you are linking, open WhatsApp → tap the **menu** (top-right on Android, **Settings** on iPhone) → **Linked devices** → **Link a device** → scan the QR.
- 6 Wait 10–30 seconds. The status badge in Botline flips to  **Connected**.

If the badge says **Disconnected** later, the phone running WhatsApp went offline (battery, no network, app force-closed). Click  **Reconnect** on the same dashboard page and re-scan the QR.

Connect via Cloud API

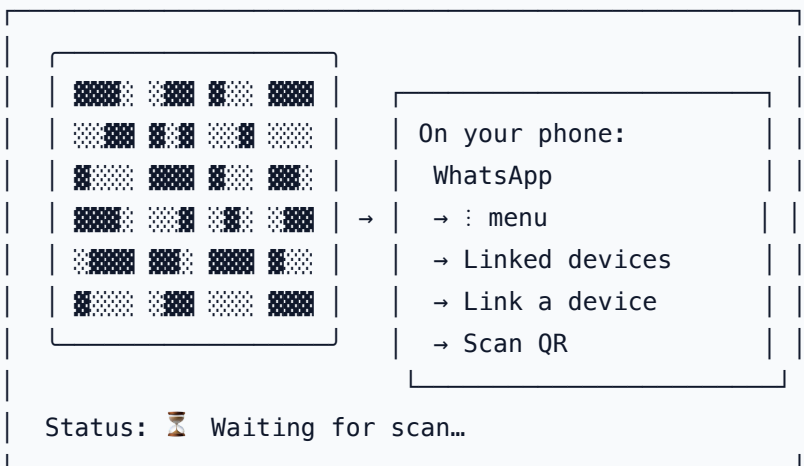
- 1 Same page, click **+ Add WhatsApp Number** → choose **Cloud API**.
- 2 Click **Continue with Facebook**. Sign in to your Meta Business portfolio.
- 3 Add the phone number you want — Meta sends a 6-digit verification code by SMS or voice.
- 4 Approve permissions for Botline.

- 5 Wait for provisioning — typically 30 seconds to 5 minutes. The badge flips to  **Connected**.

Important. A WhatsApp number can only be active in one place at a time. If your number is registered in the WhatsApp Business app on a phone, you must delete that account first (Settings → Account → Delete Account). The recipient side keeps your chat history.

 See it live: botline.cc/dashboard/whatsapp

Linking a number via Baileys QR (typical flow):



After scan (10–30 seconds later):

Sales line · +92 300 1234567  Connected

Chapter 8 — System prompt, AI agent prompt, activation

This chapter unlocks: the AI's personality and what it will and will not do.

Botline gives you two layers of prompting, in order of precedence:

- **System prompt** (account-wide) — sets the brand voice, rules, no-go zones. Lives at `/dashboard/settings/ai` under *System prompt*.
- **Agent prompt** (per-agent) — narrows that voice for one specific agent, like *Sales* or *Support*. Lives at `/dashboard/agents/[id]` under *Prompt*.

When the AI replies, it sees: system prompt + agent prompt + relevant KB chunks + the recent conversation history.

Set the system prompt

- 1 Open <https://botline.cc/dashboard/settings/ai>.
- 2 In **System prompt**, write a short paragraph covering: who you are, what you sell, your tone, what you absolutely will not do.

A workable example:

You are Aria, the AI assistant for FreshBakes Lahore. We sell custom cakes and pastries. Always reply in the same language the customer used. Be warm, helpful, and concise — never push a sale. Never quote a price for a custom cake without asking for size, flavour, and date first. If the customer asks about a competitor, redirect to our service. Never share staff phone numbers or our delivery rider's contact.

- 1 Save.

Set an agent prompt

- 1 Open <https://botline.cc/dashboard/agents>. Each archetype seeds at least one agent automatically — for retail it is *Sales*, for clinics it is *Receptionist*, for qurbani centres it is *Payment Verifier* and *Slaughter Coordinator*.
- 2 Click an agent. The agent has: a **name** customers see in WhatsApp ("This is Aria from FreshBakes..."), an **avatar**, a **prompt**, an **assigned knowledge base** subset, and a

persona toggle (formal / casual / friendly).

- 3 Edit the **prompt** to focus that agent. For *Sales* it might be: *"Your goal is to qualify the lead and capture their order. Always close by asking for their name and address."*
- 4 Toggle **Active**. An inactive agent is invisible to the router.

Activate the AI

- 1 Back at <https://botline.cc/dashboard/settings/ai>.
- 2 Toggle **AI is replying** to **On**. Until this is on, every customer message lands in your inbox unanswered.
- 3 Save.



See them live: botline.cc/dashboard/settings/ai · botline.cc/dashboard/agents

Chapter 9 — Multiple AI agents (Sales, Support, Booking)





This chapter unlocks: specialised AI agents that route by intent.

Once your volume grows past a few conversations a day, one agent doing everything starts to feel generic. Botline lets you run multiple AI agents — each with its own name, prompt, knowledge subset, and avatar — and routes each conversation to the right one.

- 1 Open <https://botline.cc/dashboard/agents>.
- 2 Click **+ New agent**. Give it a name (e.g. *Booking Assistant*), a role description, and an avatar.
- 3 Write its **prompt**. Stay narrow — the more focused, the better:
 - *Sales* — qualify the lead, capture name + budget + need, suggest products, close with a CTA.
 - *Support* — never quote prices; help with tracking, returns, complaints; escalate any anger or refund request to a human.
 - *Booking* — collect appointment details (service, date, time, customer name, phone), confirm, send the calendar link.
 - *Payment Verifier* — when customer sends a receipt screenshot, extract the amount + transaction ID + sender name and post to staff for approval.
- 4 Assign a **knowledge base subset** — only the docs this agent should see. *Support* sees policies, *Sales* sees catalog and pricing.
- 5 Set the **routing rule** — keywords, message intent (Botline detects intent automatically), customer tag, or fallback.
- 6 Save and toggle **Active**.

 **See it live:** botline.cc/dashboard/agents

A typical Botline agent roster for a clinic:

Agent	Routing	Status
 Receptionist	booking, appointment	● Active
 Triage	urgent, pain, ER	● Active
 Billing	invoice, insurance	● Active
 Aria (sales)	other / fallback	● Active

Examples in practice

- A **clinic** runs *Receptionist* (booking + rescheduling), *Triage* (urgent symptom routing), and *Billing* (insurance, invoice queries).
- A **boutique** runs *Sales* (catalog + checkout), *Support* (returns + sizing), and *Stylist* (outfit suggestions, occasion-based).
- A **qurbani centre** runs *Sales* (animal selection + pricing), *Payment Verifier* (receipt screenshots), and *Slaughter Coordinator* (Eid-day scheduling).

Cost note. More agents do not cost more — every reply uses one agent. Routing chooses. If a conversation is misrouted, you can manually reassign on the conversation page.

Chapter 10 — What is AI Beta / Draft Review mode?

This chapter unlocks: the safest way to put AI into a live customer conversation.

There are three modes the AI can operate in:

Mode	What happens	When to use
Off	AI does not reply. Every message lands in your inbox.	Holidays, training, audits
Draft Review (also "AI Beta")	AI generates a reply but does not send. The reply appears as a gold dashed bubble in your inbox with Approve · Edit · Reject buttons. Customer waits until you act.	First 50 conversations, after a prompt change, when stakes are high
Live (default once you flip the switch)	AI sends replies automatically. Confidence-based: low-confidence replies still go through Draft Review even when in Live mode.	Most of the time, once you trust it

Draft Review is the seatbelt. It lets the AI do real work — actually composing the reply, looking up the right KB chunk, formatting links — but you stay the final author. The customer never sees a wrong word.

Where to switch modes

- 1 Open <https://botline.cc/dashboard/settings/ai>.
- 2 Find the **Reply mode** card. The radio options are *Off* · *Draft Review* · *Live*.
- 3 Pick **Draft Review** and save.

 See it live: botline.cc/dashboard/settings/ai

Reply Mode

- Off AI does not reply
- Draft Review AI drafts; you approve before send
- Live AI sends automatically

Auto-send threshold: ●————○———— 0.85
(Below threshold, drafts queue even in Live mode)

Confidence threshold. Below the radio there is a slider — “Auto-send if confidence $\geq X$ ”. Default is 0.85 (85%). Below that, even in Live mode, the reply queues as a draft. Lower the slider to send more aggressively, raise it to be more conservative.

Chapter 11 — A full week in Draft Review

(worked example)

This chapter unlocks: the muscle memory for actually using Draft Review productively.

Most tenants who try Draft Review give up in two days because they think it doubles their workload. It does not, if you use it right. Here is exactly how a typical week goes.

Day 1 (Monday)

You flip Draft Review on at 9 AM. By 10 AM, you have eight drafts sitting in your inbox. Each is a gold dashed bubble with the AI's reply.

For the first eight, you click **Approve** (✅) without editing. They look right. Customers receive them within a second of your click. Total time per draft: 4 seconds.

Two are wrong — one quotes a price that is six months old, one mentions a competitor. You **Edit** the first to remove the price (let the customer ask for a quote), and **Reject** the second. The Reject button does not just kill the draft — it also flags the conversation as “needs prompt fix,” and the AI logs the rejection reason for your end-of-week review.

Day 2

You add a “Things to never say” doc to your KB based on yesterday's two rejections — including the outdated price and the no-mention-competitor rule.

Today you have ten drafts. You approve nine, edit one. The reject rate dropped to zero.

Days 3–4

The AI starts to feel right. You glance at drafts, see the answer is correct, hit Approve. You begin trusting it on the safer topics — opening hours, delivery, basic product specs.

You raise the confidence threshold from 0.85 to 0.90 — meaning the AI will draft more aggressively but you still review the borderline ones.

Day 5 (Friday)

You decide three categories of conversation can move to Live mode: - *Greeting and menu replies* — these are static, never wrong. - *Opening hours questions* — KB-grounded, low risk. -

Order tracking — pulls from your order DB, factual.

Everything else stays in Draft Review for now.

You open **/dashboard/settings/ai → Routing rules**, set those three intents to *Auto-send*, and save. Drafts start arriving only for the harder conversations: pricing for custom orders, complaints, returns.

End of week 1

Your daily Draft Review load is 5–8 messages, taking 5 minutes total. The AI handles the rest. You sleep better because you know nothing wrong went out.

By week 4, most tenants flip the master toggle to Live and let confidence-based gating handle the rare uncertain reply. Some never do — and that is fine too.

Anti-pattern. Approving every draft without reading is worse than turning Draft Review off. Read each one. The point is the muscle memory.

Chapter 12 — Test your bot before customers do

This chapter unlocks: the safety net that catches embarrassing mistakes.

You should never let a real customer be the first person to talk to your AI. Test it yourself.

Method 1 — Send to your own number

- 1 Pick up another phone (or use a colleague's).
- 2 Send "Hi" to your connected WhatsApp number.
- 3 Watch the inbox at <https://botline.cc/dashboard/conversations> — your message arrives, the AI drafts (if in Draft Review) or sends (if in Live), and you see exactly what a real customer would.
- 4 Test these specific scenarios:
 - o **Greeting** — first contact. Does the menu fire? Does the media attach?
 - o **Menu number** — type "1". Does the right reply come back?
 - o **Common question** — ask about your bestseller. Is the price right? The description?
 - o **Curveball** — ask about something not in your KB. Does it gracefully say "I am not sure, let me connect you with someone"?
 - o **Rude message** — type "you are useless". Does it stay calm, apologize, escalate?
 - o **Competitor mention** — ask about a rival. Does it redirect cleanly?
 - o **Off-topic** — ask about football scores. Does it pivot back?

Method 2 — Use your inbox as the simulator

For privacy or convenience, you can also test in-app:

- 1 `/dashboard/conversations` — open any test conversation (or create one with the **+ Test conversation** button on Pro plans).
- 2 Type a message as the customer would.
- 3 The AI replies in real-time (or drafts, depending on mode).
- 4 Mark the conversation as a *test* so it is excluded from analytics.

Sign-off checklist

Before flipping to Live, verify:

- Greeting fires with media on first contact
- Menu numbers each produce the right reply
- Three common questions get correct answers
- One curveball gets a graceful "I do not know, let me hand off"
- Out-of-hours mode behaves as configured (test outside business hours)
- Escalation triggers when you say "talk to a human"
- Tone matches your brand — read three replies aloud

If any item fails, fix the prompt or KB before going live.

Chapter 13 — Going Live — flipping the switch

This chapter unlocks: AI replies to your real customers.

If you have done chapters 1–12, this chapter is one click.

- 1 Open <https://botline.cc/dashboard/onboarding> if you have a remaining set-up checklist, or go directly to <https://botline.cc/dashboard/settings/ai>.
- 2 Set **Reply mode** to **Live** (or keep it on **Draft Review** if you want supervision for another week).
- 3 Confirm **AI is replying** is **On**.
- 4 Save.

That is it. From this moment on, every message arriving on your connected WhatsApp number is read by the AI, matched against your KB, routed to the right agent, and answered (or drafted, depending on mode).

What literally happens behind the scenes

- 1 WhatsApp message arrives at Meta or your Baileys session.
- 2 Botline receives it within ~1 second and writes a row to the inbox.
- 3 If business hours allow, the conversation router selects the right agent.
- 4 The AI assembles its prompt: system prompt + agent prompt + relevant KB chunks + last 10 messages.
- 5 It generates a reply, scores its own confidence, and either sends or drafts based on your mode + confidence threshold.
- 6 The reply lands in WhatsApp 1–3 seconds after the customer sent.

The first 24 hours

- Open **/dashboard/conversations** every couple of hours and skim 5–10 random replies.
- Use the 🔍 **Show drafts** filter to review anything that did not auto-send.
- If anything is off, *do not panic*. Open the conversation, hit **Take over**, type a fix manually. Note the issue. Update the KB or prompt at the end of the day.

 **See it live:** botline.cc/dashboard/settings/ai

Chapter 14 — The conversation page tour

This chapter unlocks: every tool for managing a live conversation.

The conversation page at <https://botline.cc/dashboard/conversations> is where you spend most of your time once live. It looks like a WhatsApp inbox, with extras.

The three columns

- **Left rail:** list of conversations, sorted by last activity. Click any to open it.
- **Middle:** the message thread itself. Bot replies are blue/teal. Customer messages are grey. Your manual replies are indigo. Drafts are gold dashed.
- **Right rail:** customer info, conversation metadata, action buttons.

The actions

Button / shortcut	What it does
Take over (top-right)	Pauses the AI for this conversation. Subsequent messages go to your inbox unanswered until you resume. Use when a customer needs a delicate human touch.
Resume AI	Re-enables the AI for this conversation only.
Tags	Add free-form tags (vip , complaint , lead , paid , wholesale). Tags filter the inbox and can drive routing rules.
Lead score	Botline auto-scores 0–100 based on intent signals — keyword density, questions asked, response speed, mentions of buying. You can override manually. Filter the inbox by score to see the hottest leads first.
Move to	Re-route the conversation to a different AI agent (e.g. from <i>Sales</i> to <i>Support</i>) or to a different staff member.
Pin	Keep this conversation at the top of your inbox until manually unpinned. Use for VIPs and ongoing escalations.

Button / shortcut	What it does
Unsend (Pro+)	Tap any of your sent messages within 48 hours and click Unsend — works for bot or manual messages. Particularly useful for “Unsend & Correct” if the AI sent a typo.
Drafts	A gold dashed bubble next to a draft has three buttons: Approve (✓ send), Edit (✎ tweak then send), Reject (✗ kill). Reject also asks why so the AI learns.
Internal note	Add a private note visible only to staff. Notes do not go to the customer. Useful for handoffs.
Customer info (right rail)	Phone, name, tags, lifetime spend, order history, last booking, opt-in status. Click any to filter or search.

🔗 See it live: botline.cc/dashboard/conversations

Conversation page layout (3-column):

Inbox	Thread	Customer
<ul style="list-style-type: none"> Sara K. Ahmed Q. Bilal M. Hassan A. Aisha S. 	<p>Sara: "Do you have the red bag in stock?"</p> <p>👑 Aria: "Yes, in M and L. Want me to reserve one?"</p>	<p>Sara Khan</p> <p>+92 300 ...</p> <p>Tags: vip, lead</p> <p>Lead score: 87 / 100</p> <p>Actions: Take over</p> <p>Move to ▾</p> <p>Pin · Tag</p>
<p>+ filters</p> <p>Show: All ▾</p> <p>Tag: vip ▾</p> <p>Score: 80+ ▾</p>	<p>Draft</p> <p>💎 Aria (low conf): "We close at 9 PM for orders..."</p> <p>[✓ Edit ✗]</p>	

Chapter 15 — Notifications & escalations

This chapter unlocks: the ability to know — without watching — when a human is needed.

You cannot stare at the inbox 24/7. Botline pings you when the AI hands off, when a draft has been waiting too long, when a customer is angry, or when something is breaking.

Configure where notifications go

- 1 Open <https://botline.cc/dashboard/settings/notifications>.
- 2 Add the channels you want notifications on: **Email** (always on, cannot disable), **WhatsApp** (Pro+) — sent to a designated phone number, **Slack** (paste an Incoming Webhook URL), **Telegram** (link a bot).
- 3 Toggle each event on or off:
 - o **AI escalated to human** — fired when the AI tags a conversation for human attention (anger detected, refund requested, low confidence on a high-stakes question, “talk to a human” said).
 - o **Draft pending > 30 min** — a draft waited too long for review.
 - o **VIP customer messaged** — any conversation tagged `vip` lights up.
 - o **Disconnected** — your WhatsApp link dropped.
 - o **Daily digest** (8 PM local) — counts of sent / drafted / escalated / failed for the day.

Triage when a notification fires

- 1 Click the notification. It deep-links to the conversation.
- 2 Read the last few messages.
- 3 Decide: AI got it right (resume), AI got it wrong (take over and reply manually), the customer is upset (escalate to your most experienced staff via *Move to*).
- 4 After the conversation ends, log the lesson — update the KB or prompt so the AI handles this case next time without your help.

The escalation path

Botline supports a multi-tier escalation:

- 1 **AI** — first tier. Handles ~80% of conversations end-to-end.

- 2 **Staff** — second tier. Any conversation the AI flags or any staff member takes over.
- 3 **Engineering / Ops** — third tier (Pro plan). Reserved for *platform-level* problems — billing, integrations, broken links — escalated from staff via the **Escalate to Engineering** button on the conversation page.



See it live: botline.cc/dashboard/settings/notifications

Appendix A — URLs cheatsheet

Memorize these. They are the entire app.

URL	What it is
https://botline.cc	Marketing home
https://botline.cc/signup	Create account
https://botline.cc/dashboard	Your home page once logged in
https://botline.cc/dashboard/onboarding	The setup wizard (chapters 1–13 wrapped up)
https://botline.cc/dashboard/settings	Profile, hours, billing, notifications
https://botline.cc/dashboard/settings/business-type	Pick or switch your business profile
https://botline.cc/dashboard/settings/ai	System prompt, reply mode, confidence threshold
https://botline.cc/dashboard/settings/notifications	Email / Slack / WhatsApp alerts
https://botline.cc/dashboard/knowledge-base	Documents, FAQs, media
https://botline.cc/dashboard/whatsapp	Connect, reconnect, manage WhatsApp lines
https://botline.cc/dashboard/whatsapp/menu	Greeting menu builder
https://botline.cc/dashboard/agents	Multiple AI agents
https://botline.cc/dashboard/conversations	Live inbox
https://botline.cc/dashboard/broadcasts	Broadcast campaigns (Pro+)
https://botline.cc/dashboard/billing	Plan, invoices, usage
https://botline.cc/blog	All how-to posts and announcements

Appendix B — Common mistakes

After supporting hundreds of tenants, these are the top ten ways to slow yourself down. Avoid them.

- 1 Skipping the business profile.** Without an archetype, you start from zero — no greeting, no FAQs, no menu. Always pick one.
- 2 Uploading a thin KB.** Five FAQs is not enough. Aim for 25+ FAQs and at least one comprehensive product/services document. The AI is only as good as the source material.
- 3 Vague system prompt.** "You are a helpful assistant" tells the AI nothing. Be specific: who you are, what you sell, your tone, what you will not do.
- 4 Going Live without testing.** Always send messages to your own number first. Always.
- 5 Setting the wrong timezone.** Reminders fire at the wrong hour, "good morning" greets people at midnight, business hours are off. Check **Settings → Profile** before anything else.
- 6 Leaving dummy data in the menu.** If your archetype seeded a sample bank account, replace it with your real one before going live. Customers will literally pay into the dummy account if you do not.
- 7 Sending huge greeting attachments.** A 100-page brochure as the first contact will get you blocked. Use a banner image or a 2-page summary PDF.
- 8 Never reviewing rejected drafts.** Every reject is a free signal about what to add to your KB. Block 15 minutes a week to review the *Rejected* filter.
- 9 Multiple agents with no routing rule.** If you have three agents and no routing keywords, the *first* agent gets every conversation. Set keywords or intent rules.
- 10 Disconnecting WhatsApp without noticing.** When the badge says *Disconnected*, your number is silent. Set up the *Disconnected* notification in Appendix-A's *settings/notifications* page so you find out instantly.

Appendix C — First-day checklist

Print this page. Tear it out. Tick as you go.

- Sign up at botline.cc/signup with my business email
- Verify OTP, land on </dashboard>
- Pick my business profile at </dashboard/onboarding>
- Confirm country, currency, timezone
- Upload at least one PDF + 20 FAQs to </dashboard/knowledge-base>
- Edit the greeting menu at </dashboard/whatsapp/menu>
- Upload a banner image, toggle "Send on greeting"
- Set business hours under </dashboard/settings> → Hours
- Connect WhatsApp at </dashboard/whatsapp> (QR scan)
- Write the system prompt at </dashboard/settings/ai>
- Edit the seeded agent's prompt at </dashboard/agents>
- Activate the agent (toggle ON)
- Set Reply Mode to "Draft Review"
- Test by sending "Hi" from another phone
- Review and approve / edit / reject 5 drafts
- Configure escalation notifications at </dashboard/settings/notifications>
- Once comfortable, set Reply Mode to "Live"

If everything is ticked, your first AI conversation is live.

Welcome to Botline.

Document version v5. Last updated May 2026. The latest version of this manual is always at botline.cc/onboarding-guide.pdf