Get set up in 10 minutes

From a new account to your first real call. Do these once and you're ready to load a list. **About 10 min.**

1. **Create your account**
   Go to dialswarm.com/signup. Use your work email. If someone gave you a referral code, add it and you start with 100 free calls instead of 10.

2. **Add your company and product**
   In the portal, open Company & Products. Add your company name, then a product with one or two lines on what it is and why people buy it. That's what the agent pitches.

3. **Build your first agent**
   Open Agents, then New agent. Give it a name, pick a voice and a speaking style, choose the product, and write an opening line if you want one. Save.

4. **Talk to it before it talks to anyone**
   In the agent editor, click Talk to it and have a conversation in your browser. Push back like a real prospect. Tweak the opening line and objections until it sounds right.

5. **Confirm the compliance basics**
   Open Settings. Tick the three calling confirmations and leave the recording notice on. Turn on Save call recordings if you want to play calls back later.

6. **Call your own phone**
   On the agent card, use Test call to dial your own mobile. Answer it and see how it handles you. Then you're ready for a real list.

TIPS

- Short opening lines work best: who you are, why you're calling, one question.
- Write the three objections you hear most into 'If they push back'.

Load a lead list and start a campaign

A campaign is one agent working one list inside the hours you choose. **About 5 min.**

1. **Get your list ready**
   A CSV with name, phone and company works. Add notes, and the consent source and date for each lead (where and when they agreed to be called).

2. **Create the campaign**
   Open Campaigns, then New campaign. Pick the agent, the calling window, calls per hour, and a call schedule: how long to wait before trying again when nobody picks up, like 4 hours, then 1 day, then 3 days.

3. **Upload and confirm consent**
   Upload the CSV or paste the list. Confirm that every person agreed to be called by your business. Each lead keeps its consent record, so you can show it later.

4. **Start it**
   Click Start. The agent dials inside your window, leaves voicemails when it hits one, and retries the rest on the schedule you set.

5. **Watch it work**
   The live console in the bottom right shows each call as it happens: dialing, who picked up, the transcript, and the outcome.

TIPS

- Start with 50 leads and read the first ten transcripts before you scale up.
- Set Voicemail to Only on the last try so people don't get a message every time you call.
- Pause any time from Campaigns. Nothing dials while it's paused.

Call new web leads in minutes

Send each new form fill to DialSwarm and the agent calls while they still remember asking. **About 10 min.**

1. **Make an API key**
   In the portal open Integrations, then API keys. Tick the consent confirmation and create a key. Copy it somewhere safe.

2. **Add a consent line to your form**
   Your web form should say people agree to be called by your business, including by an AI voice. Keep the wording and the date they submitted.

3. **Send each lead to DialSwarm**
   In Zapier or Make, add a webhook step: POST to dialswarm.com/api/v1/leads with your key, the name, phone, campaign name, consent source, consent date and your business name. The API page has a ready example.

4. **Start the campaign**
   The leads land in the campaign you named. Start it once, and new leads are called as they arrive, inside your calling window.

5. **Test with your own number**
   Fill in your own form with your mobile. Your phone should ring within a few minutes during calling hours.

TIPS

- Outside calling hours, leads wait and are called first thing in the window.
- Use a webhook back to your CRM (call.completed) so the outcome shows up there too.

Listen in and coach a live call

Hear any call while it's happening, steer the agent without the prospect hearing you, or take the call yourself. **About 2 min.**

1. **Open the live console**
   It sits in the bottom right of the portal. Click the pill to expand it. Every live call has its own row.

2. **Listen in**
   Click the headphones on a call to hear both sides through your computer. Click again to stop.

3. **Send a tip**
   Click the light bulb, then type a short tip like 'focus on the product features' and press Enter. Or click the mic and say it. The agent picks it up from its next sentence.

4. **Take over when it matters**
   Click the phone button on the call, enter your mobile once, and click Ring me. The agent says one line to bring you in, and the call rings your phone.

5. **Pop it out**
   Click the pop-out button in the console header. In Chrome or Edge you get a small window that stays on top of everything, so you can keep working while you listen.

6. **Turn tips into training**
   Every tip is saved with the agent. On the agent's page, click Draft updated instructions from these tips to get a merged draft, edit it, then click Use this and Save. Or add tips one at a time.

TIPS

- One short instruction at a time works best.
- Tips never get read out to the prospect.

Work your follow-ups and lead history

Every call ends with a suggested next step. Nothing falls through the cracks. **About 3 min.**

1. **Open Follow-ups**
   After each call the system suggests what to do next: call back tomorrow, try again in two days, and so on. Overdue ones are marked.

2. **Decide in one click**
   Choose I'll do it, Let the agent call (the lead goes back in its campaign at the due time), Snooze a day, Done, or Dismiss.

3. **See everything about a lead**
   Open Leads to search every lead across your campaigns. Click one to see every call: date, outcome, summary, recording and transcript.

4. **Export when you need it**
   Use Export CSV on the Leads page to take the list, with outcomes and call counts, anywhere you like.

TIPS

- Work Follow-ups first thing every morning.
- Interested and callback leads are the money. Hit those first.

Turn on call recordings

Play any call back inside DialSwarm. You never have to open your phone carrier's site again. **About 1 min.**

1. **Turn them on**
   Open Settings. Keep 'Tell people the call is transcribed and may be recorded' on, then tick 'Save call recordings'. Save.

2. **Play a call**
   Open Calls and click any call. The recording plays at the top of the drawer, above the summary and transcript.

3. **Or play it from the lead**
   Every call in a lead's history has its own player, so you can hear how the whole relationship went.

TIPS

- Recordings are stored on DialSwarm's own servers and deleted with the call record.
- Several states require everyone on the call to be told. The notice handles that.

Set up your AI receptionist

A warm, calm assistant answers your line when you can't, takes a clear message and flags anything urgent. **About 5 min.**

1. **Open Reception**
   Add your name and company exactly as callers should hear them, your business hours, and anything extra that counts as urgent for you.

2. **Pick the number**
   Choose which of your numbers she answers. Add a number under Numbers first if you don't see it.

3. **Switch it on**
   Tick 'Reception is on for this number' and save. DialSwarm support connects the line for you.

4. **Read your messages**
   Each message shows who called, the callback number, what it's about, an urgent flag, a three line summary, the transcript and the recording.

TIPS

- Included on Team. $15 a month as an add-on to other plans.
- Click Turn on desktop alerts on the Reception page to get a pop-up for each new message while DialSwarm is open.
- She always says she's an AI if someone asks, and never promises anything for you.

Copy your own voice

Make an agent that sounds like you. Your voice only, with your consent on the recording. **About 3 min.**

1. **Open the agent**
   Go to Agents and edit the agent that should use your voice. Scroll to Copy your voice.

2. **Read the script**
   Type your full name, then click Start recording and read the script on screen at a normal pace, ending with the consent line. About 30 seconds.

3. **Check and send**
   Play it back. If it sounds clear, tick the consent box and click Send for review.

4. **We build it**
   We check the consent line, build the voice and switch the agent to it. You'll see Voice ready on the card.

TIPS

- Record somewhere quiet, about a hand's width from the mic.
- Already have a voice in ElevenLabs? Pick the ElevenLabs engine and paste its voice ID.

Stay on the right side of calling rules

DialSwarm builds the guardrails in. You bring the consent. **About 4 min.**

1. **Only call people who agreed**
   AI voice calls need prior express written consent from the person, to your business. Record where and when for every lead you upload.

2. **Respect do-not-call**
   If anyone says stop, the agent ends the call and adds the number to your do-not-call list automatically. Upload your own lists under Numbers.

3. **Call at sensible hours**
   Set each campaign's calling window. Before every dial, DialSwarm reads the prospect's local time from the area code and holds calls outside your window. The usual rule is 8am to 9pm their time.

4. **Let the agent say it's AI**
   Every agent says it's an AI assistant in its opening line and whenever asked. That can't be switched off.

5. **Keep the record**
   Every call stores the consent record, the checks that ran and what was said. Export it from Compliance any time.

TIPS

- You are responsible for consent on your lists. When in doubt, don't call.
- Read the full guide at dialswarm.com/compliance.

Refer other teams

Share DialSwarm and the people you invite start with 100 free calls. **About 1 min.**

1. **Find your code**
   Open Referrals in the portal. Your personal code and link are at the top.

2. **Share it**
   Copy the link and send it to salespeople you know. Anyone who signs up with it starts with 100 free calls instead of 10.

3. **See who joined**
   Everyone who signed up with your code shows in the list on the same page.

TIPS

- Team leads: share it with peers at other companies, not inside your own account.