DevsTree®
AI Powered Digital Excellence

AI Call Assistant: Client Guide

One AI assistant that chats, talks and calls for your business, in every language.

Prepared by **DevsTree IT Services** · devstree.com · info@devstree.com

Contents

1. The product in one minute
2. Who is involved
3. The end-to-end flow
4. Company setup: ten steps to go live
5. Where your leads come from
6. What the customer experiences
7. How the assistant talks
8. Multi-language: the core feature
9. After every conversation
10. The company dashboard
11. Safety, privacy and trust
12. How we build it: the roadmap
13. Decisions we need from you
14. Plain-language glossary

1. The product in one minute

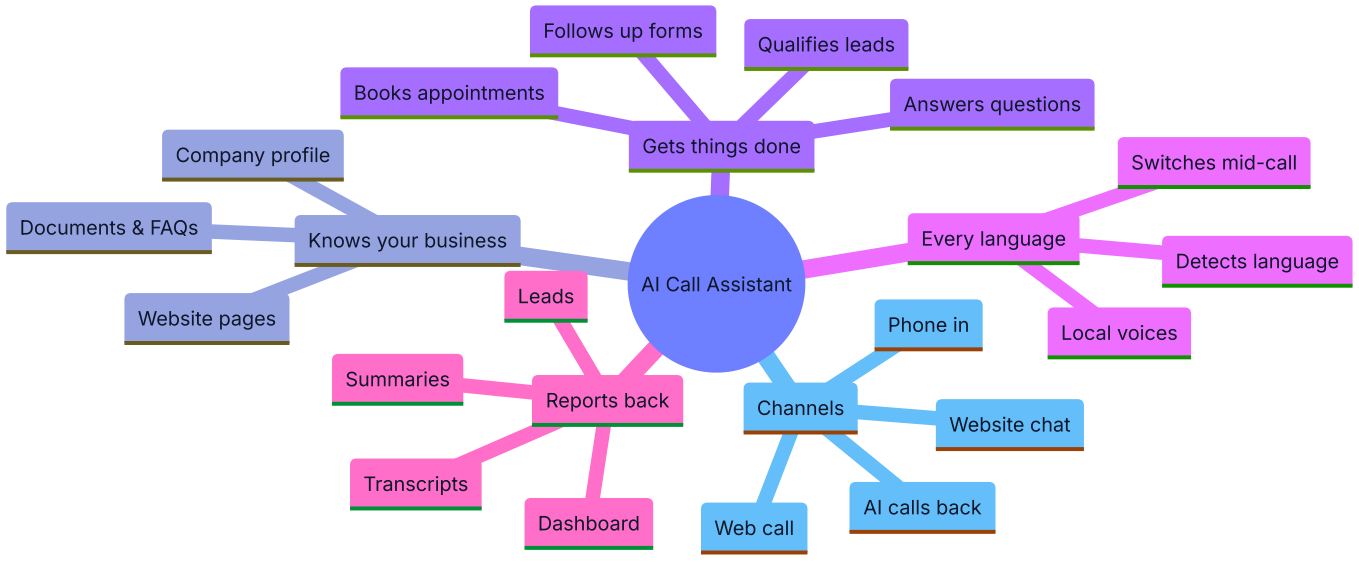
Any company, in any industry (clinic, real estate, online shop, school, agency, software), can sign up, upload its information, and get an AI assistant that answers its customers.

CHANNEL	WHO STARTS IT	HOW IT WORKS
💬 **Website chat**	Customer	A chat bubble on the company website. Type a question, get an instant answer.
🖥️ **Web call**	Customer	A “Talk to us” button. Speak with the assistant in the browser. No phone needed.
📞 **Phone: customer calls**	Customer	Customers ring the company's number. The assistant picks up, day or night.
📲 **Phone: AI calls back**	AI assistant	A customer fills an enquiry form, and the assistant calls them within minutes.

The assistant:

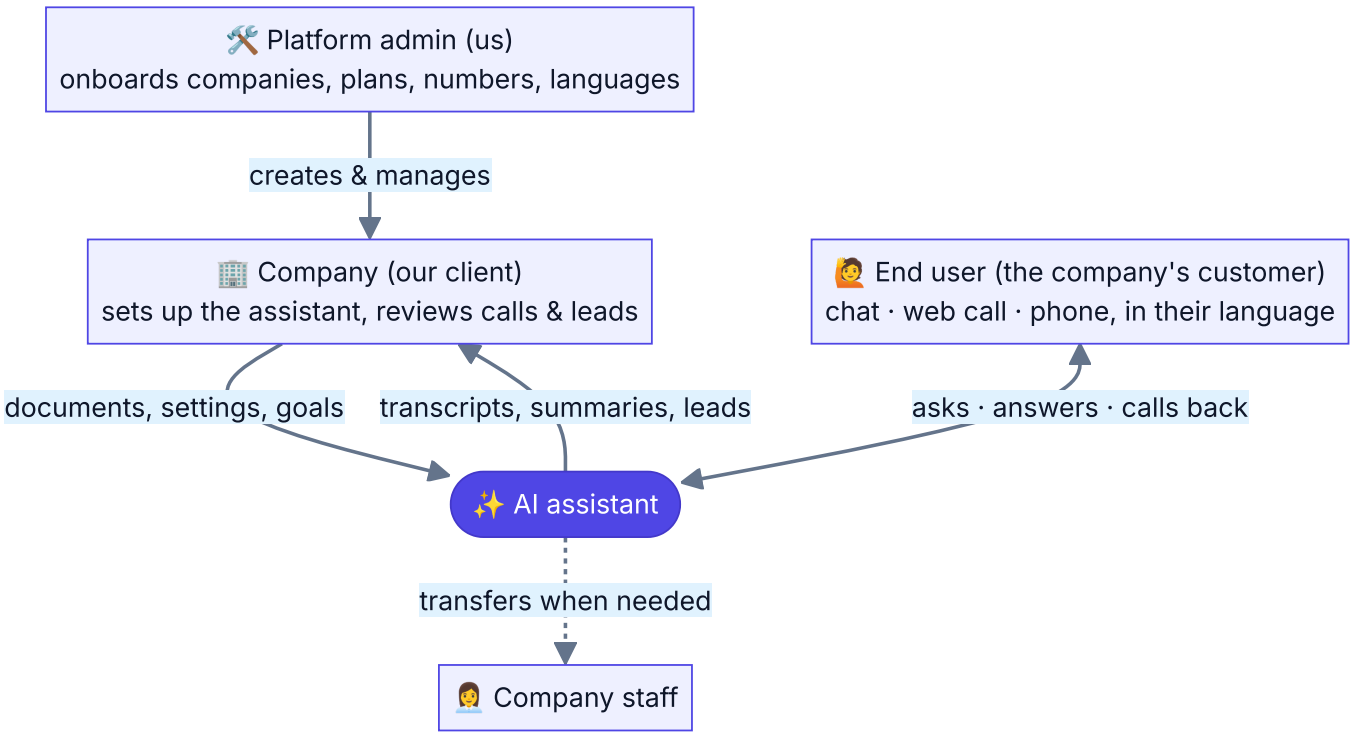
- answers in **near real time** (about one second on calls) with a **natural, human-like voice**,
- uses **only the company's own information**, and never makes things up,
- speaks the **customer's language**, and switches when they switch,
- **hands over to a real person** when needed.

OVERVIEW MAP



2. Who is involved

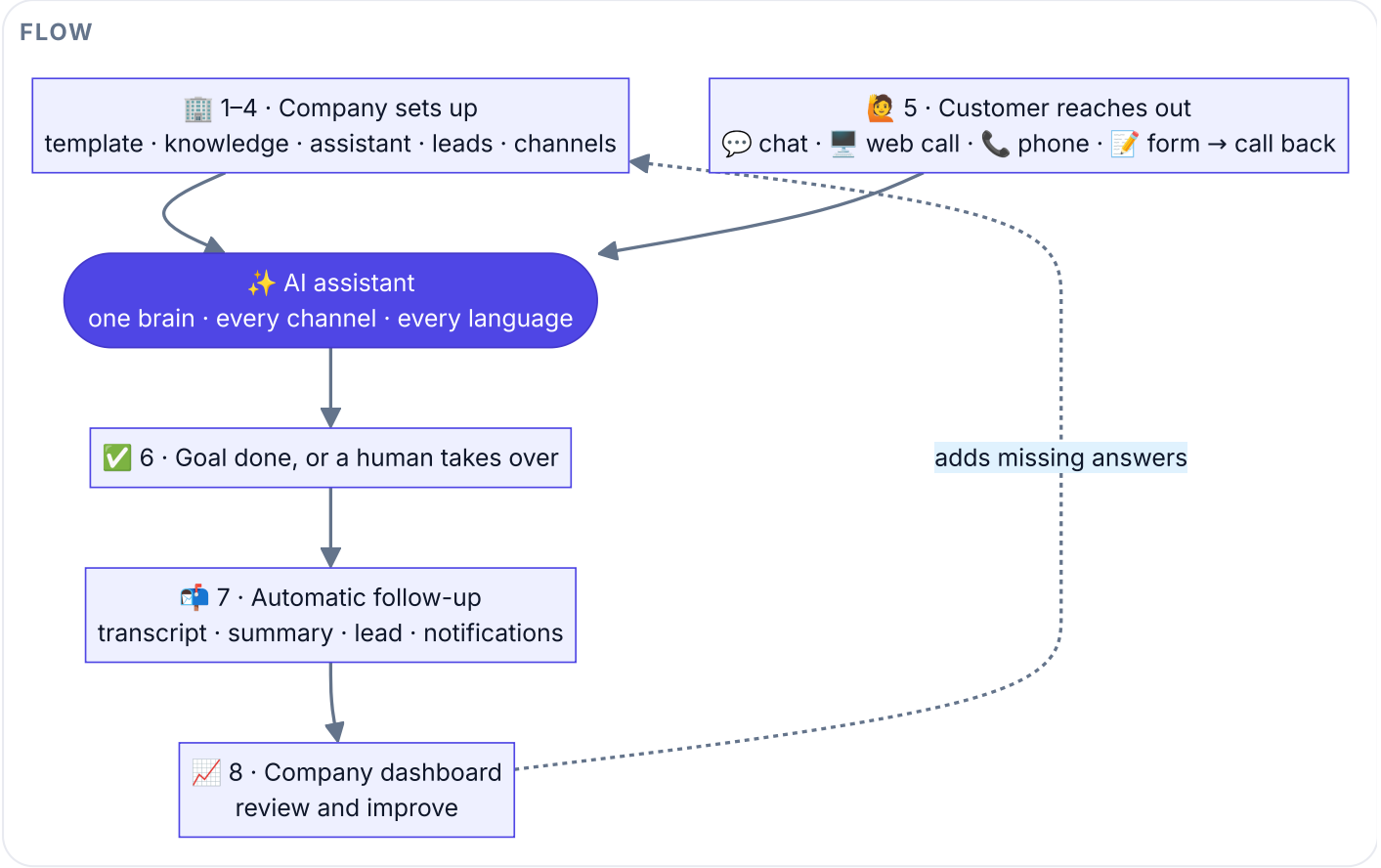
FLOW



ROLE	WHO	WHAT THEY DO
Platform admin	Us	Onboard companies, manage plans and billing, the phone number pool, supported languages and global safety settings.
Company admin & staff	Our client	Set up the assistant, pick languages and voices, upload knowledge, connect phone numbers and forms, review conversations and leads.
End user	The client's customer	Chats, talks in the browser, calls in, or receives a call after filling a form, in their own language.
AI assistant	The product	Talks to the end user, looks up answers, collects details, books or escalates, writes the summary.

3. The end-to-end flow

This is the whole story on one page: the company teaches the assistant, customers talk to it, and every conversation flows back into the company's dashboard, where the company fills gaps and the assistant gets better.



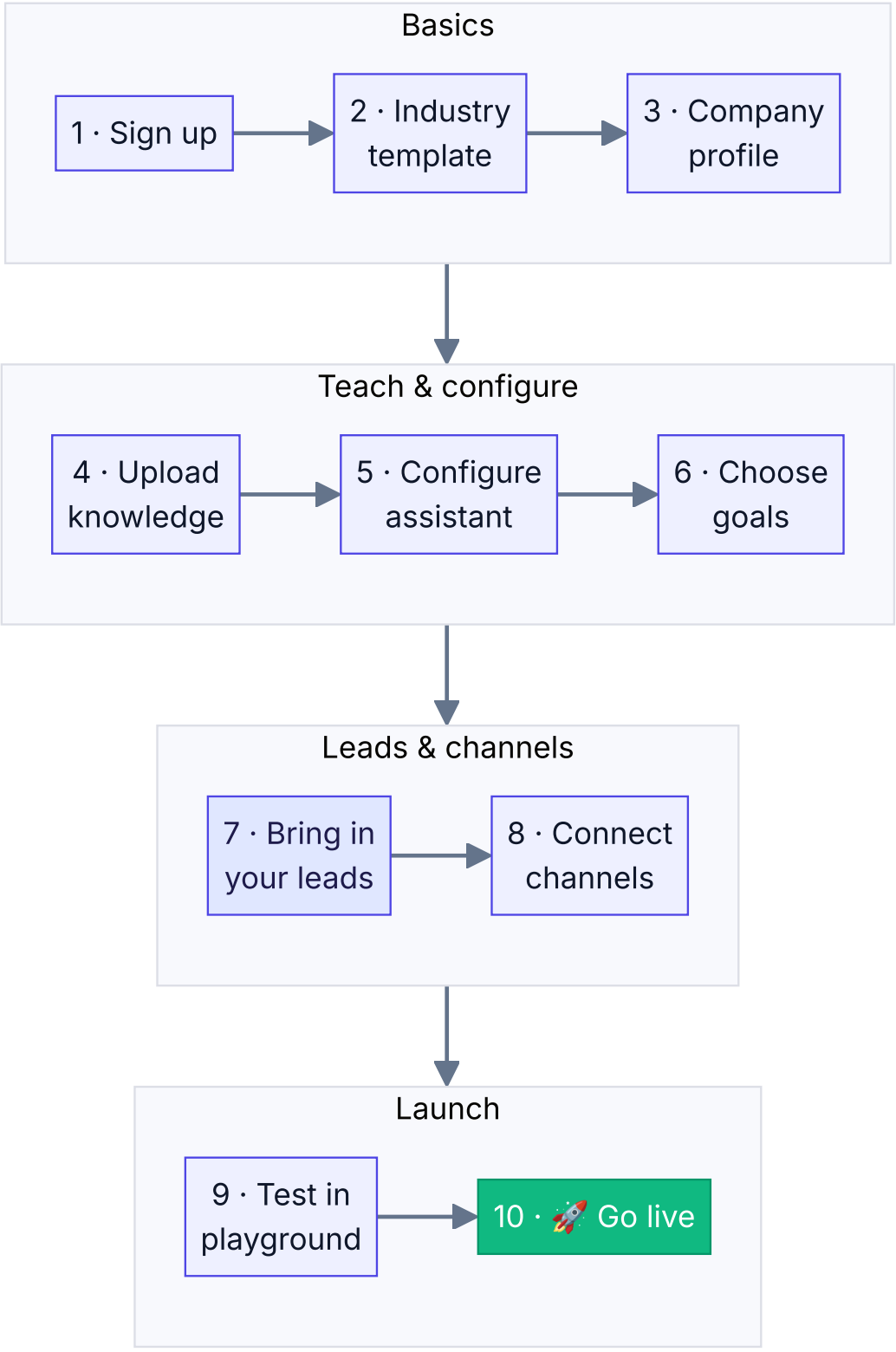
The eight steps, in words

#	STEP	WHO	WHAT HAPPENS
1	**Company joins**	Company	Account created; industry template pre-fills tone, typical questions, details to collect and goals.
2	**Teaches the assistant**	Company	Uploads documents in any language; sets the assistant's name, voice, languages, rules and goals.
3	**Brings in leads, connects channels**	Company	Imports a spreadsheet or connects Meta lead ads / the CRM; one line of code on the website; buys or forwards a phone number; sets up forms; adds a staff number for handoff.
4	**Customer reaches out**	Customer	Chats, talks in the browser, phones in, or fills a form. Never has to pick a language.
5	**Assistant talks**	AI	Detects language, finds the answer in the company's documents, works toward the goal, confirms details.
6	**Goal done, or a human takes over**	AI	Books / confirms, or transfers to a person (with a summary), or books a callback.
7	**Automatic follow-up**	Platform	Transcript, recording, summary, lead, team email, CRM push, confirmation to the customer.
8	**Company reviews and improves**	Company	Sees everything in the dashboard; answers the questions the assistant couldn't. The loop closes.

4. Company setup: ten steps to go live

One-time setup. No custom code per company: the industry template fills in sensible defaults, and the company adjusts them.

FLOW

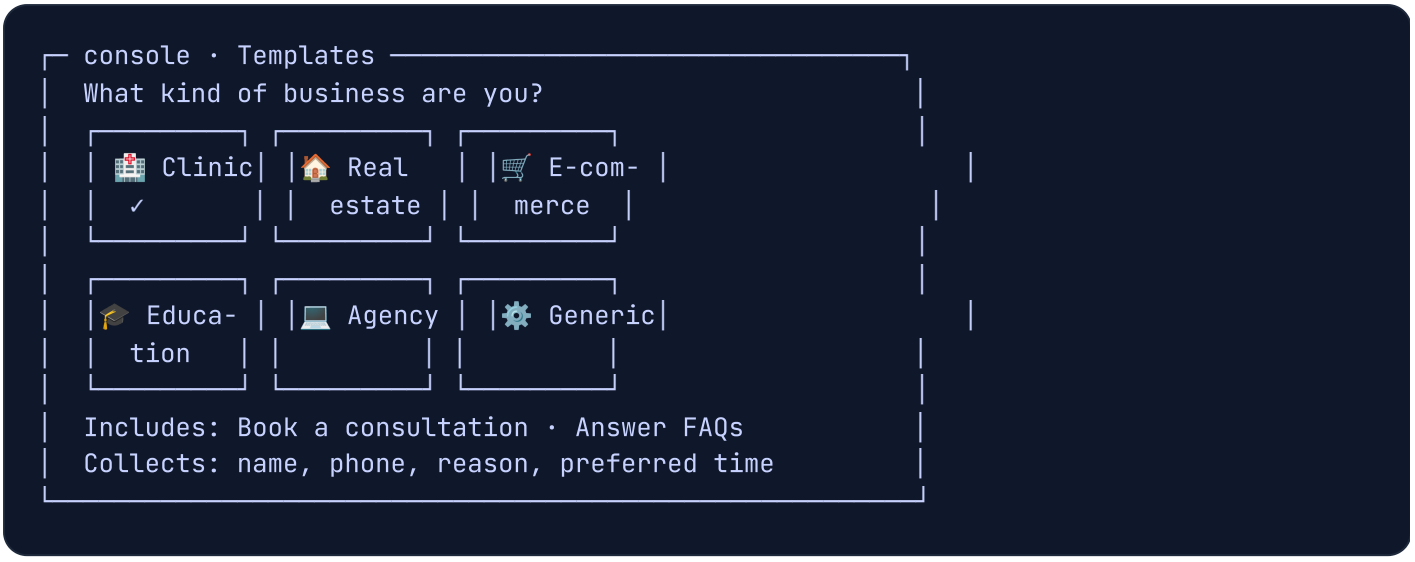


Step 1 · Sign up

The company account is created (by the company or by us) under an organisation, with an admin user and staff roles.

Step 2 · Pick an industry template

Clinic, Real estate, E-commerce, Education, Software agency or Generic. The template pre-fills tone, typical questions, details to collect and goals. **The industry is a setting, not code**, which is how one platform serves any kind of company.

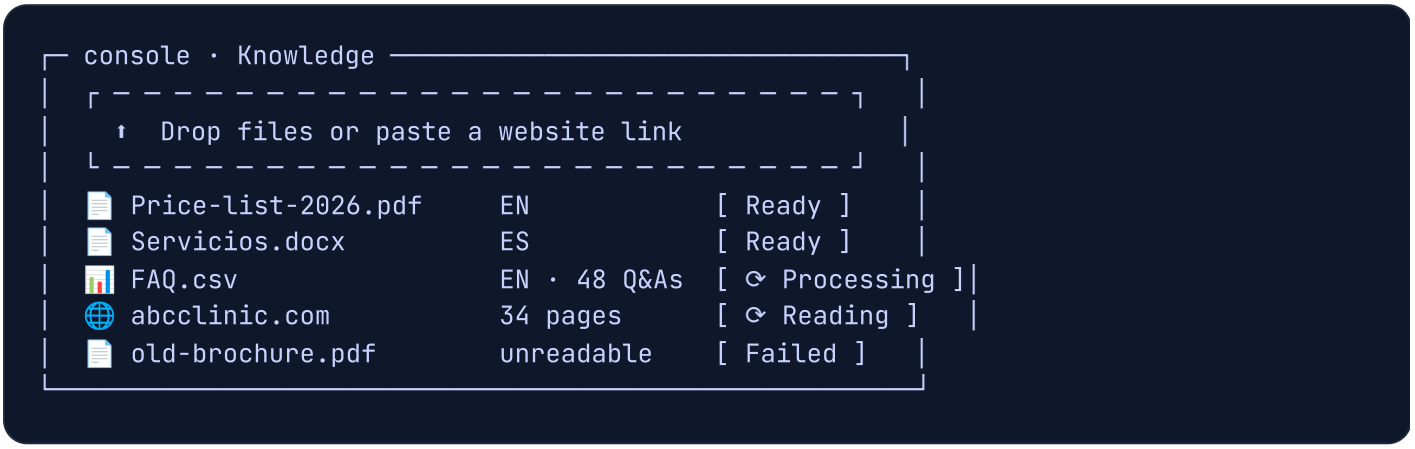


Step 3 · Company profile

Name, branches, working hours, services and products, pricing notes, escalation contacts, and **things the assistant must never say** (for example “no medical diagnoses”).

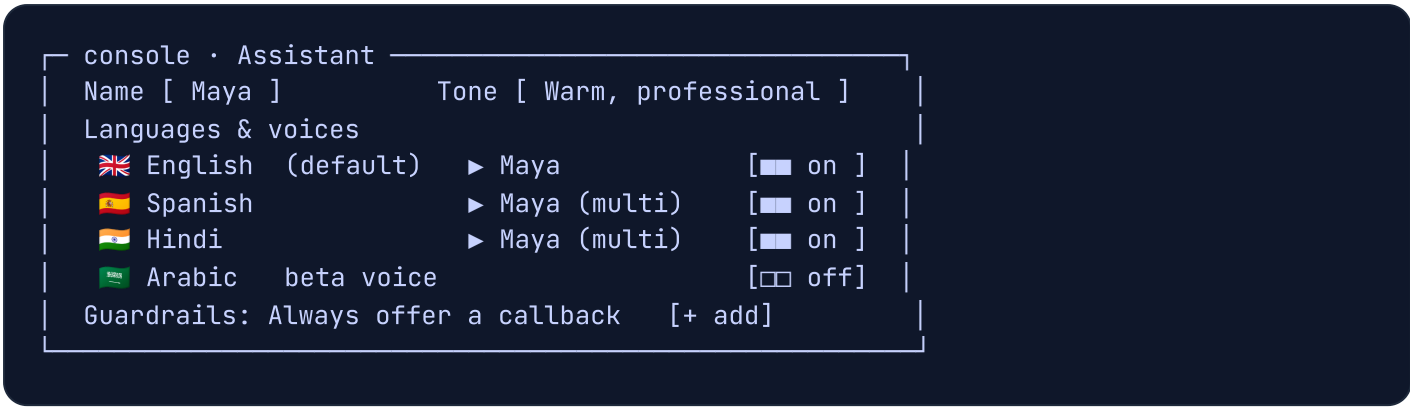
Step 4 · Upload knowledge

PDFs, Word files, text, FAQs and website links (auto-read), **in any language**. No translation needed. Each document shows a status.



Step 5 · Configure the assistant

- **Name and persona**, e.g. “Maya from ABC Clinic, warm and professional”.
- **Languages**: which ones to speak, and a default (see section 8).
- **Voice**: one per language, or one multilingual voice so the persona sounds the same everywhere. Preview each.
- **Greetings** for chat and calls, per language (auto-translated drafts the company edits).
- **Guardrails**: “don't give medical advice”, “don't quote final prices”, “always offer a callback”.



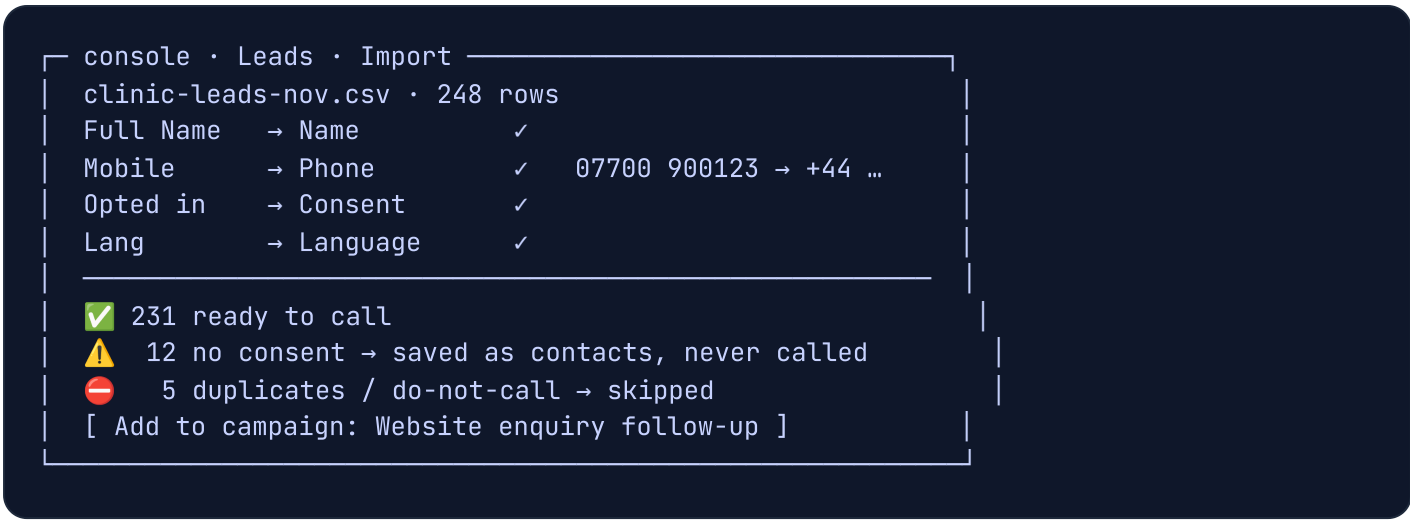
Step 6 · Choose goals (playbooks)

What the assistant should get done in a conversation. Each goal lists the details to collect and what happens at the end. **Written once, works in every enabled language.**

GOAL	DETAILS IT COLLECTS	WHAT HAPPENS AT THE END
Answer questions (default)	–	Logs anything it couldn't answer
Qualify a lead	Name, need, budget, timeline	Email team, push to CRM
Book an appointment	Name, phone (read back), reason, date/time	Confirms slot, SMS/email confirmation
Follow up an enquiry form	Only what the form didn't already capture	Used for AI call-backs

Step 7 · Bring in your leads

The people the assistant will call back. Leads can come from a **spreadsheet** (CSV, Excel or Google Sheets), **Meta lead ads** (Facebook and Instagram), the company's **website forms**, its **CRM**, and from chats and calls. The company matches the spreadsheet's columns once; every row is then checked, and only people who gave consent are called. Full detail in section 5.



Step 8 · Connect channels

- **Website chat + web call:** paste one script snippet on the website (only allowed domains work).
- **Phone:** buy a number from the platform, or forward the company's existing number. Optionally one number per language.
- **Forms / surveys:** use the platform's hosted form (in each enabled language), embed it, or connect an existing form tool.
- **Human handoff:** a staff phone number or email for transfers and callbacks, optionally per language.

```
<script src="https://cdn.yourplatform.com/widget.js" data-company="abc-clinic"></script>
```

Step 9 · Test in the playground

Chat and talk to the assistant from the dashboard in each language, and see **which documents it used** for every answer.

Step 10 · Go live

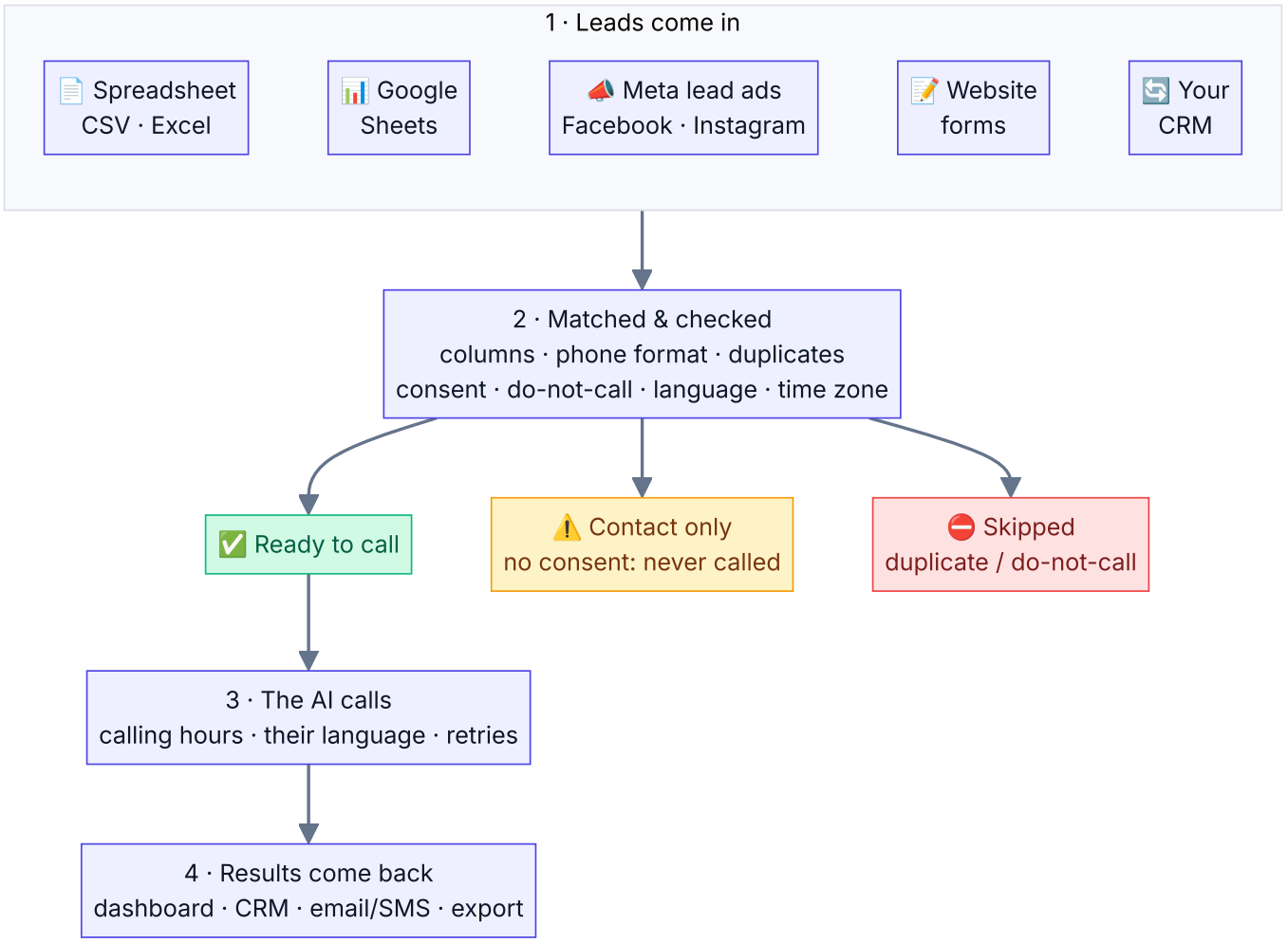
Turn it on. Customers can now chat, call and receive call-backs.

---

5. Where your leads come from

The assistant only calls people who **asked to hear from you**. This chapter shows where those people come from, how they get into the platform, and what happens before the first call.

FLOW



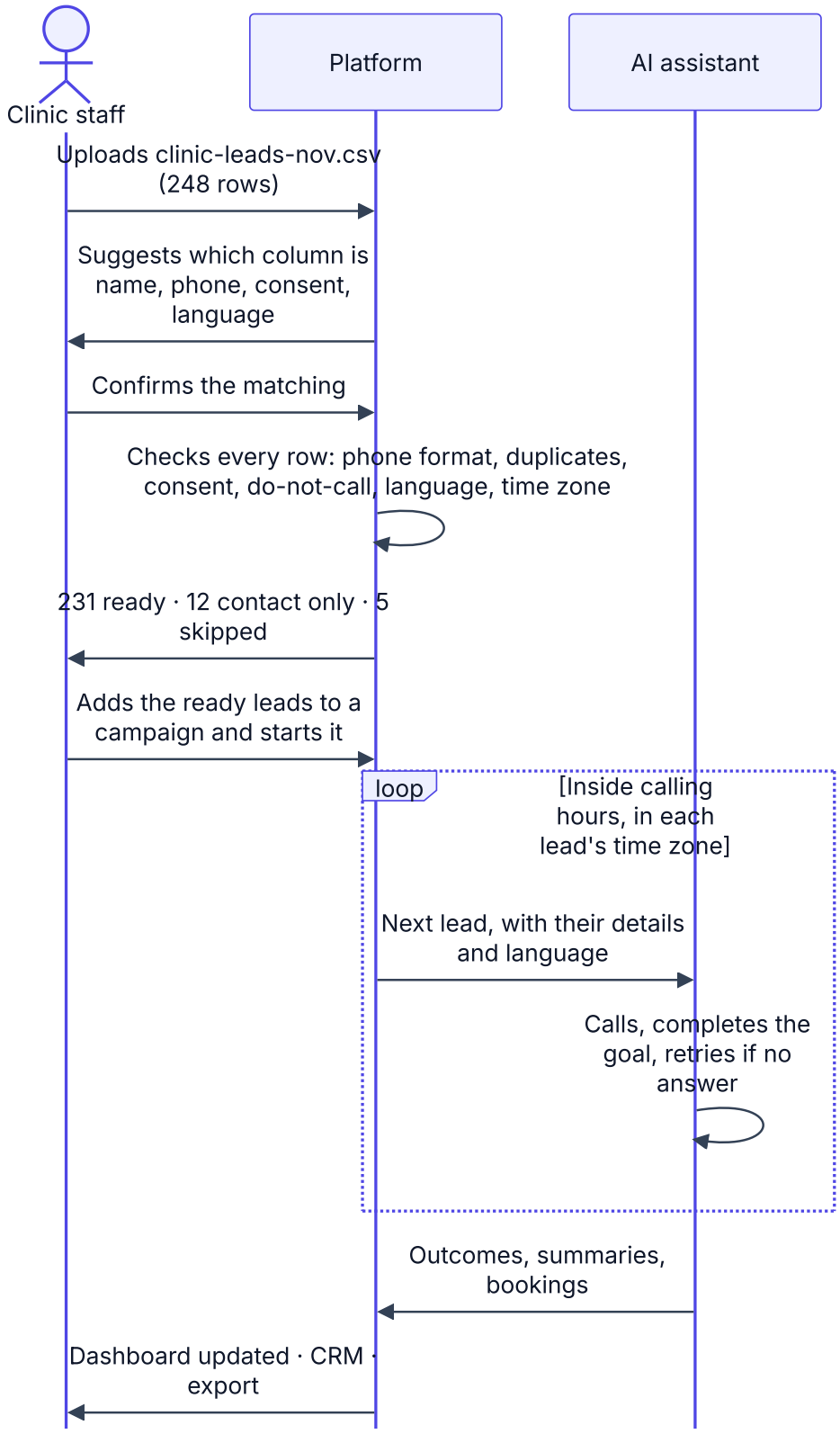
People who chat or call you are captured as leads automatically; they started the conversation, so no list is needed for them.

5.1 The ways leads arrive

SOURCE	HOW IT CONNECTS	GOOD FOR	WHERE CONSENT COMES FROM
📄 **Spreadsheet** (CSV, Excel)	Upload in the console; match the columns once	Existing lists, event sign-ups, older enquiries	A consent column and date in the file
📊 **Google Sheets**	Paste the sheet link, or keep the sheet in sync	Teams that already track leads in Sheets	Same as above
📣 **Meta lead ads**	Connected once through Zapier or Make (a direct connection later)	Facebook and Instagram campaigns	The “you may call me” question on the ad's form
📝 **Website forms**	Hosted or embedded form	Enquiries on your website	The consent tick box
🔄 **Your CRM**	A workflow in the CRM sends new leads	Leads already in your CRM	Consent recorded in the CRM
💬 **Chats and calls**	Automatic	People who contacted you	They started the conversation

5.2 Importing a spreadsheet, step by step

STEP-BY-STEP SEQUENCE

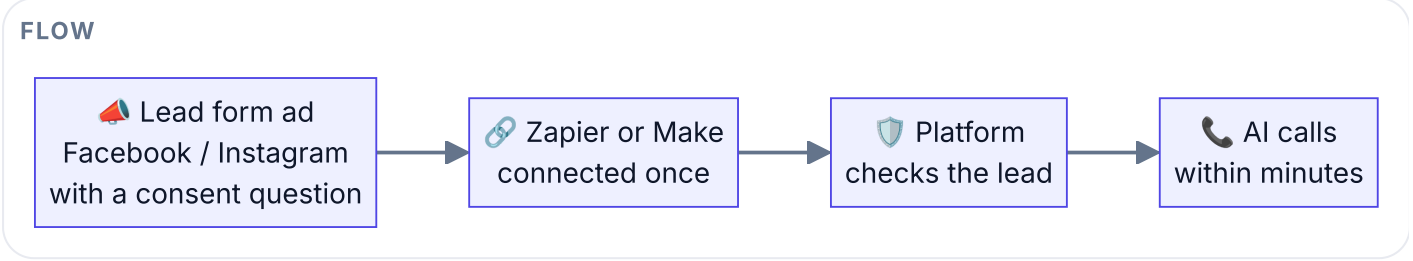


5.3 What the file needs

Column names don't have to match: the company picks which column is which during the import. A sample file can be downloaded from the interactive walkthrough.

COLUMN	NEEDED?	EXAMPLE
Name	Required	Alex Martin
Phone	Required	+44 7700 900123 (local formats are converted automatically)
Consent + date	Required to be called	yes · 2026-11-02
Language	Optional (otherwise the company default)	English
Email	Optional	alex@example.com
What they need	Optional (the assistant mentions it on the call)	Knee pain

5.4 Meta lead ads in three steps



1. **Create a lead form ad** on Facebook or Instagram, with a “you may call me” question.
2. **Connect it once**, through Zapier or Make (or a direct connection later). Each ad field is matched to a platform field, the same way as a spreadsheet's columns.
3. **Every new lead arrives in seconds**, is checked, and the assistant calls within minutes, inside calling hours.

5.5 The consent rule

- The assistant **only calls people who agreed to be called**. The wording, date and language of that consent are kept with the lead.
- Imported rows **without consent** are saved as contacts, so the team can still reach them another way, but the assistant never calls them.
- Do-not-call lists are always checked, for every source.

5.6 Getting your data out

- **Download as CSV** at any time: leads, conversations and call results.
- **Google Sheets sync** keeps a sheet up to date automatically.
- **CRM push** sends every new or qualified lead to the CRM as it happens.

> **Note for the build plan:** the system design covers website forms and webhook sources (Meta via Zapier/Make, CRM). Spreadsheet import, Google Sheets and export complete this lead flow and fit in the *Forms + AI call-backs* phase. See decisions 10–12.

---

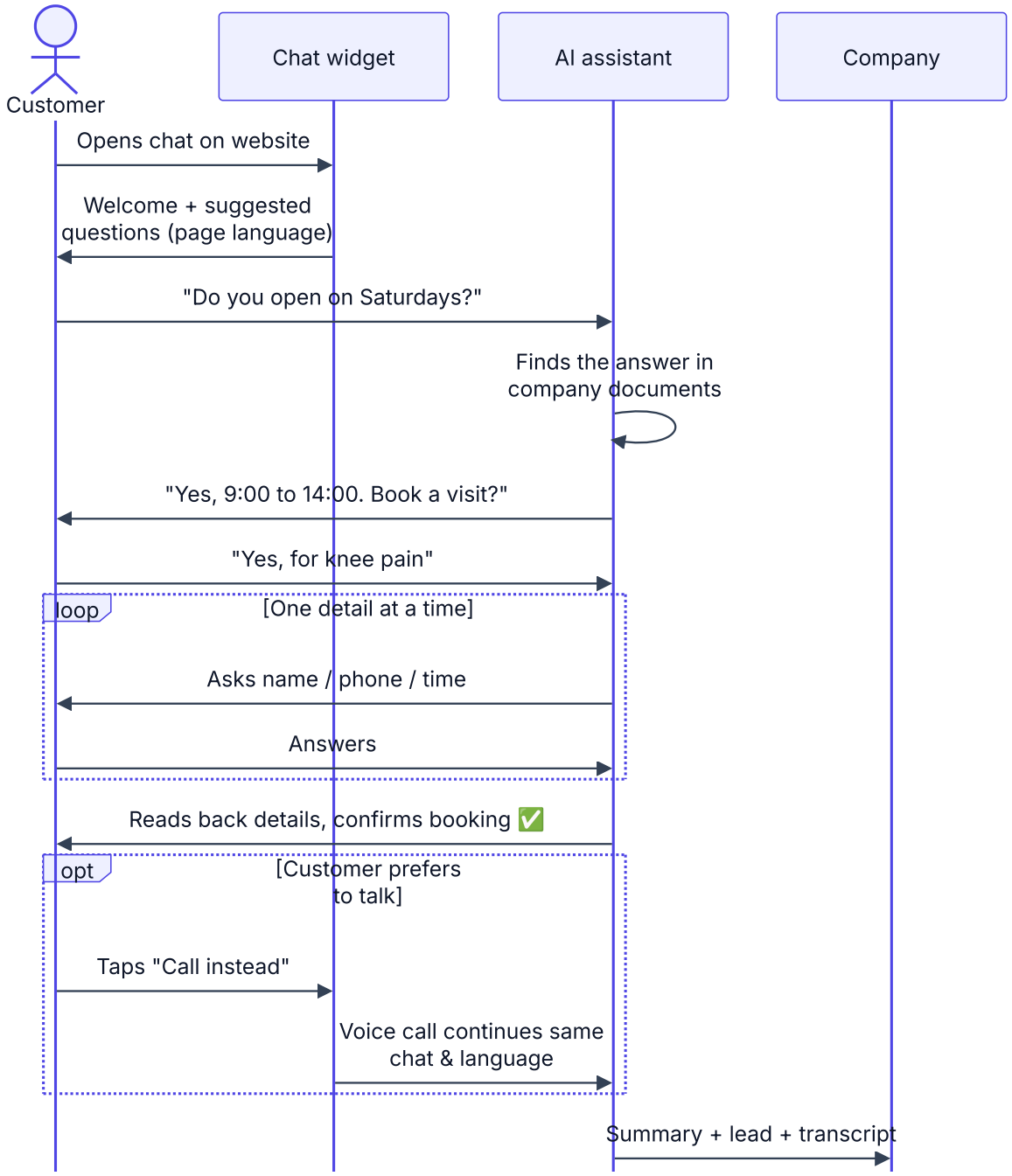
6. What the customer experiences

6.1 Website chat

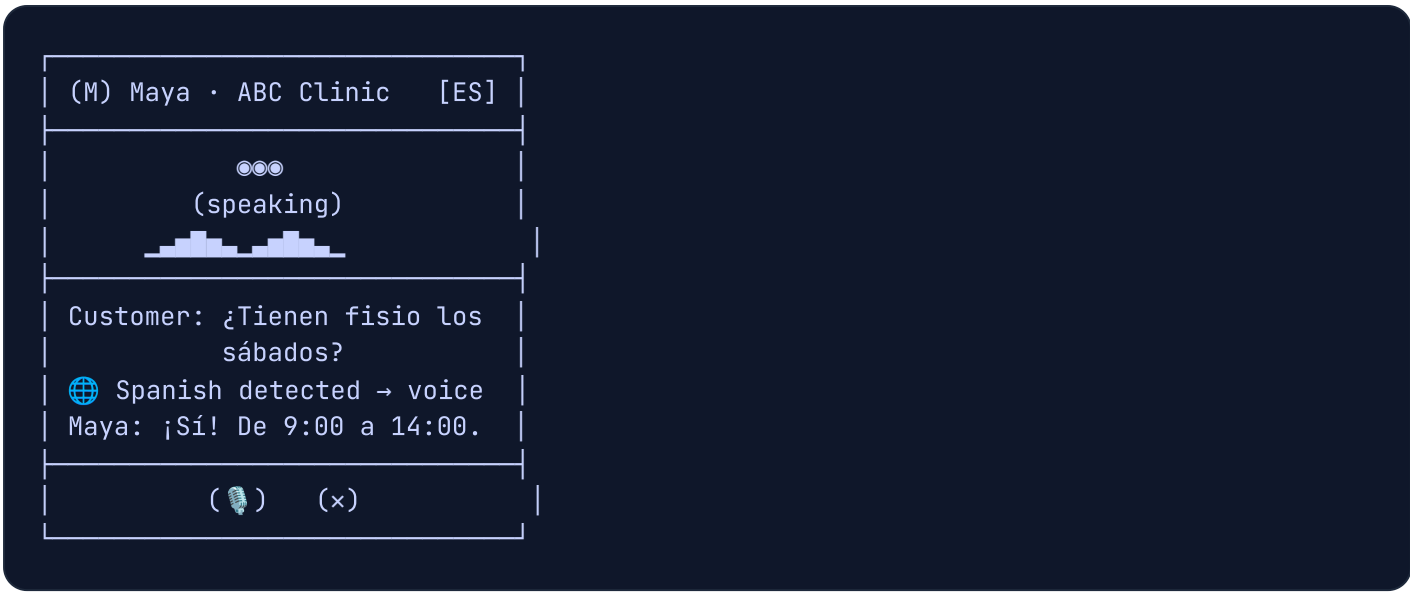


1. Customer opens the chat widget on the company website.
2. Sees the company's branding, welcome message and suggested questions, in the website / browser language.
3. Asks questions in any enabled language; the assistant answers from the company's knowledge in that language.
4. When needed, the assistant collects details (with an email code check where the goal requires it) and completes the goal.
5. Can switch to a web call from the same widget; the call continues in the same language and remembers the chat.
6. The transcript can be emailed to the customer.

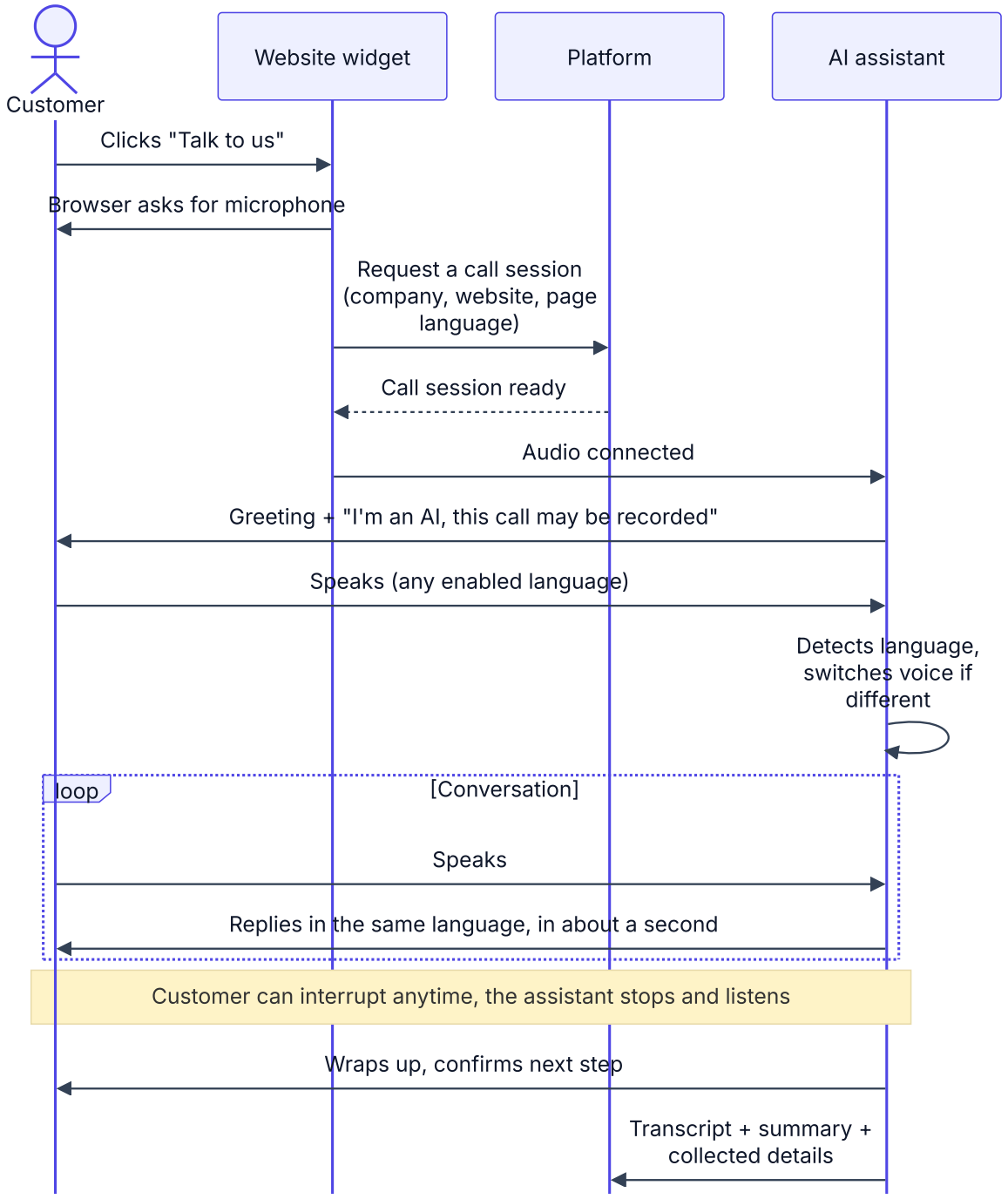
STEP-BY-STEP SEQUENCE



6.2 Web call (voice in the browser)



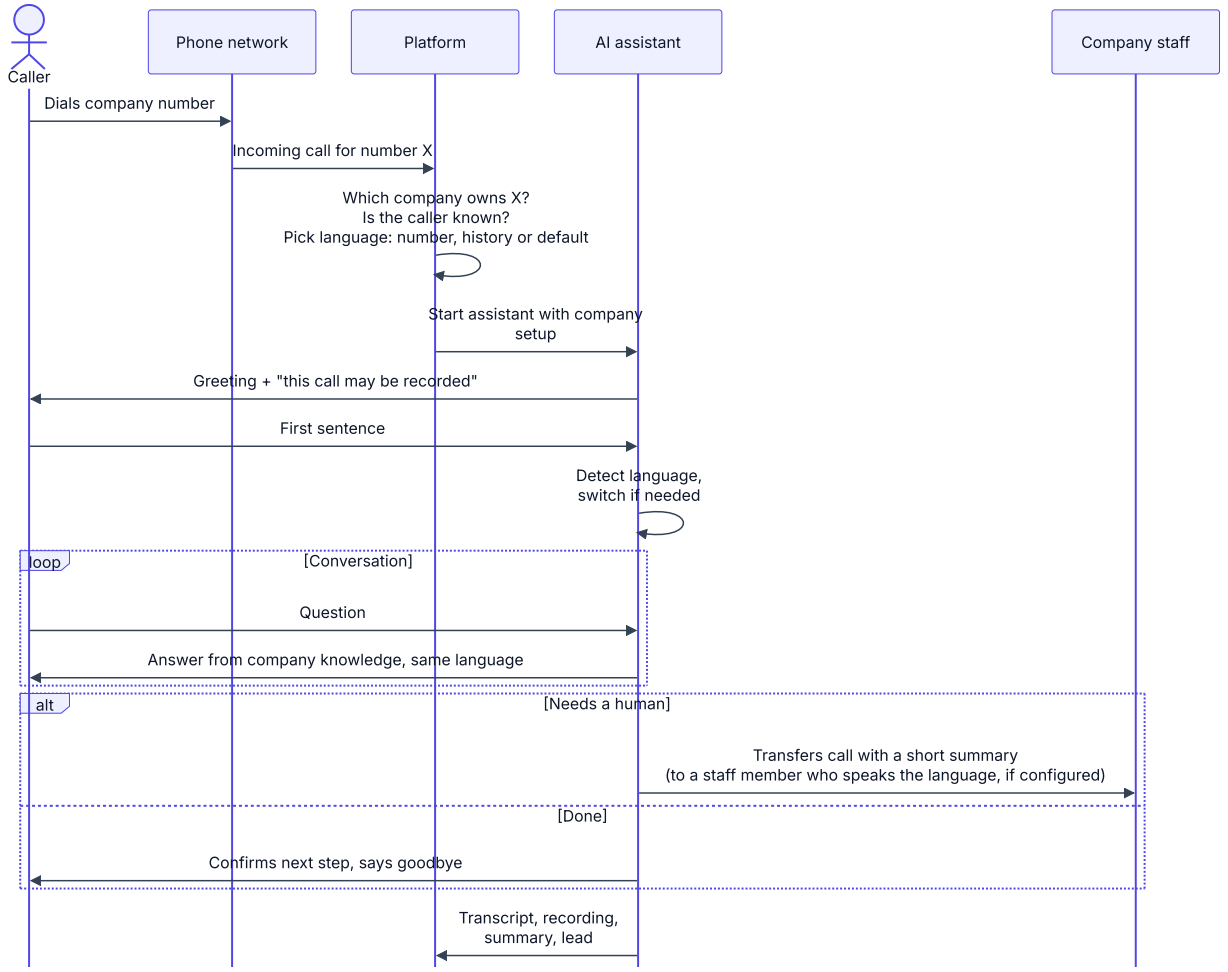
STEP-BY-STEP SEQUENCE



- Works in any modern browser; no phone needed.
- The customer can interrupt mid-sentence; the assistant stops and listens, like a real person.
- Live captions can be shown in the widget.

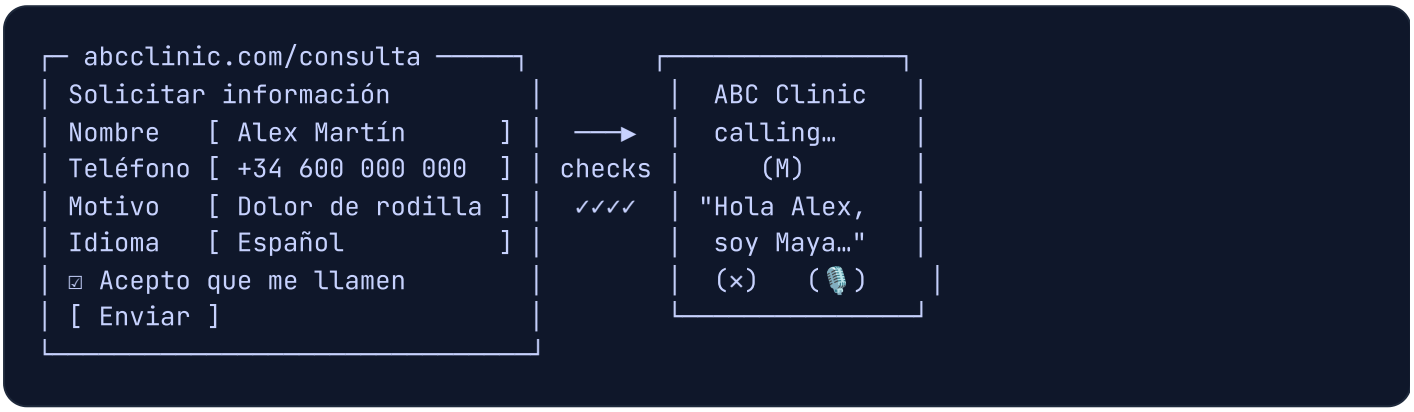
6.3 Phone call (customer calls the company)

STEP-BY-STEP SEQUENCE

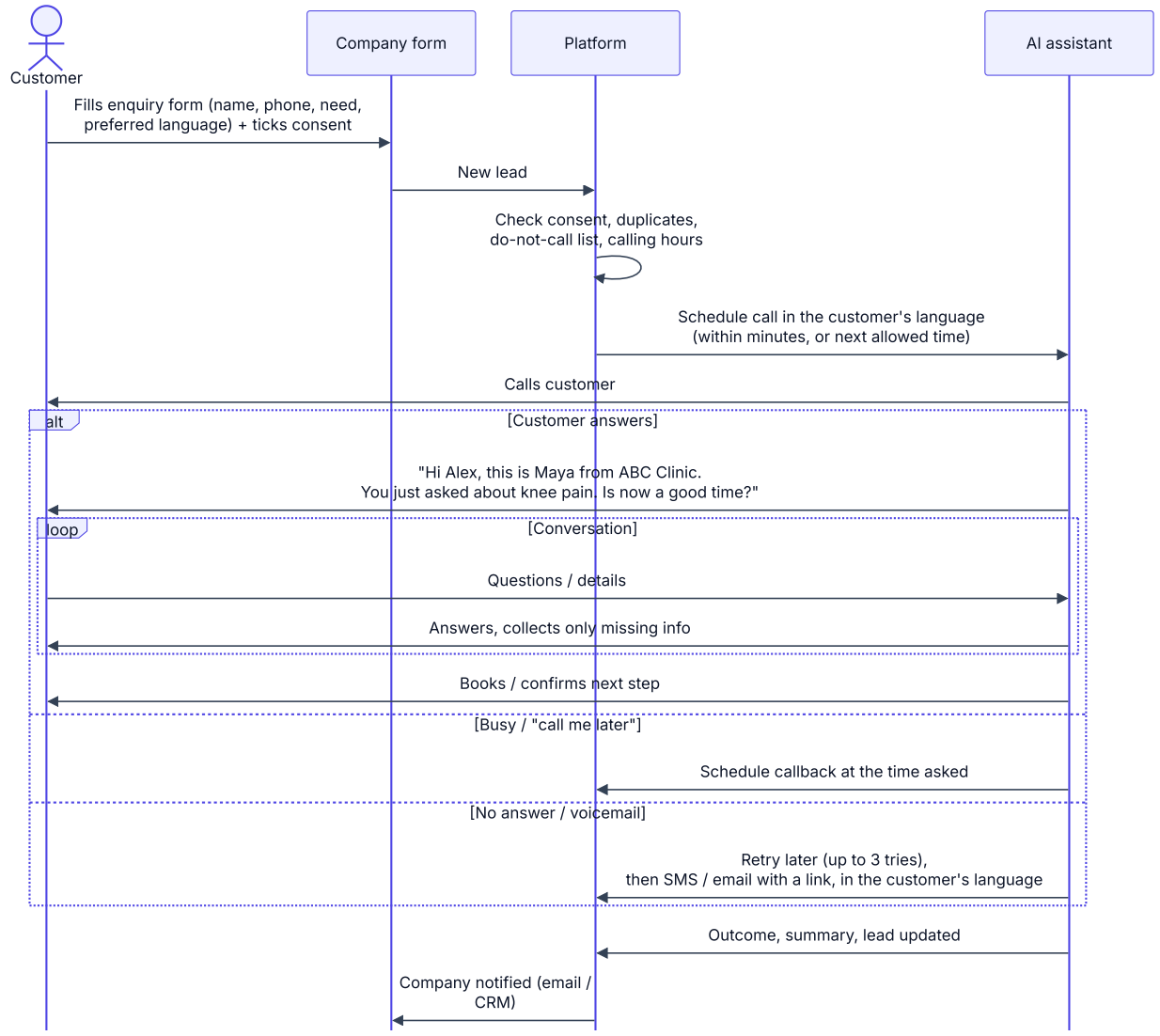


- **Returning callers** are greeted by name, in their preferred language, and the assistant remembers the last conversation.
- **Out of hours**, the assistant still answers and takes a callback request.

6.4 Form, then the AI calls the customer (outbound)



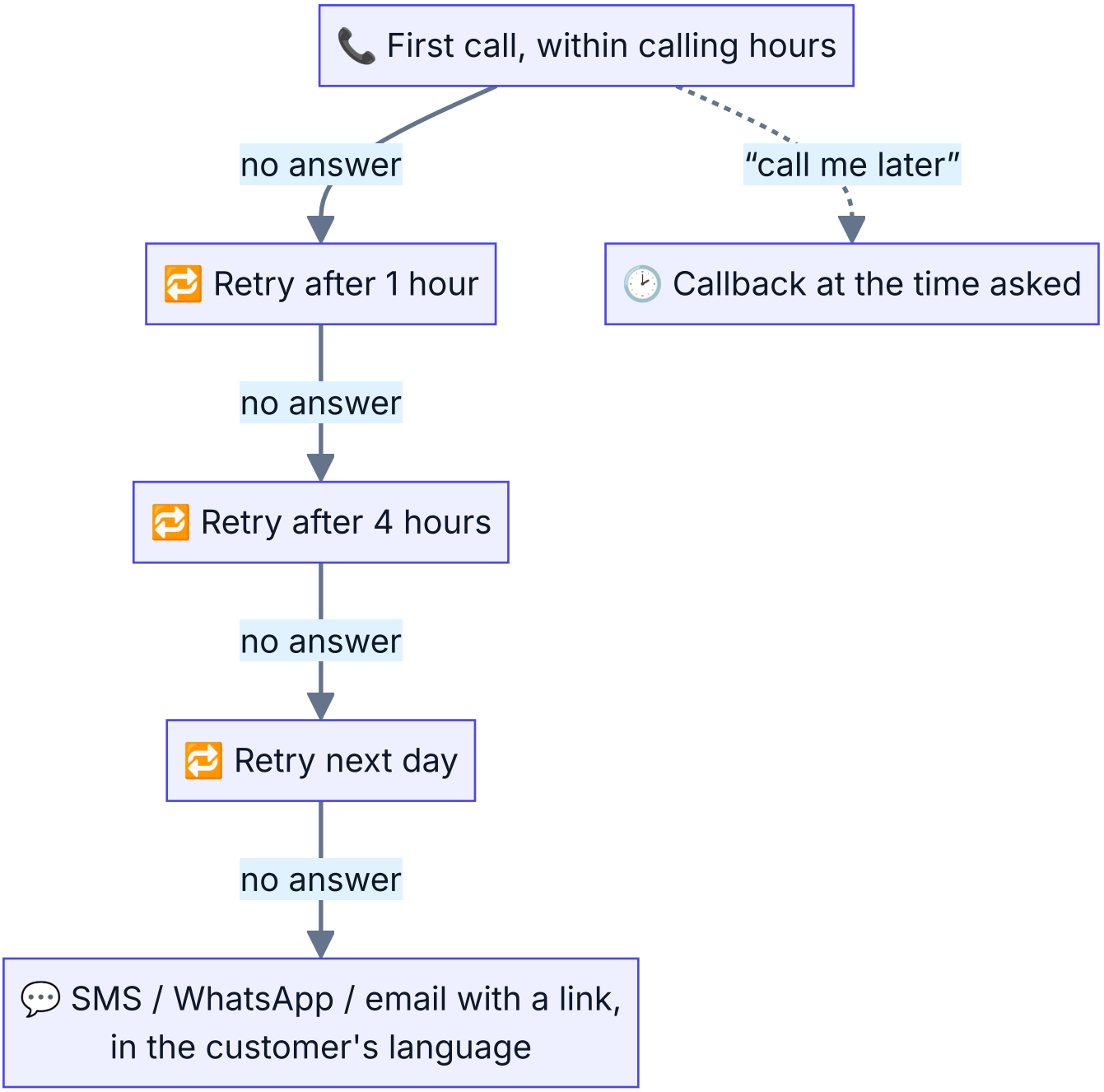
STEP-BY-STEP SEQUENCE



- The assistant already knows what the customer wrote in the form, so it **does not ask again**.
- The call language comes from the **form's language** or the customer's chosen preference.
- Calls happen **only during allowed hours** in the customer's time zone, **only with consent**, and the assistant **always says it is an AI**.

If the customer doesn't answer (default rules, each company can change them):

FLOW

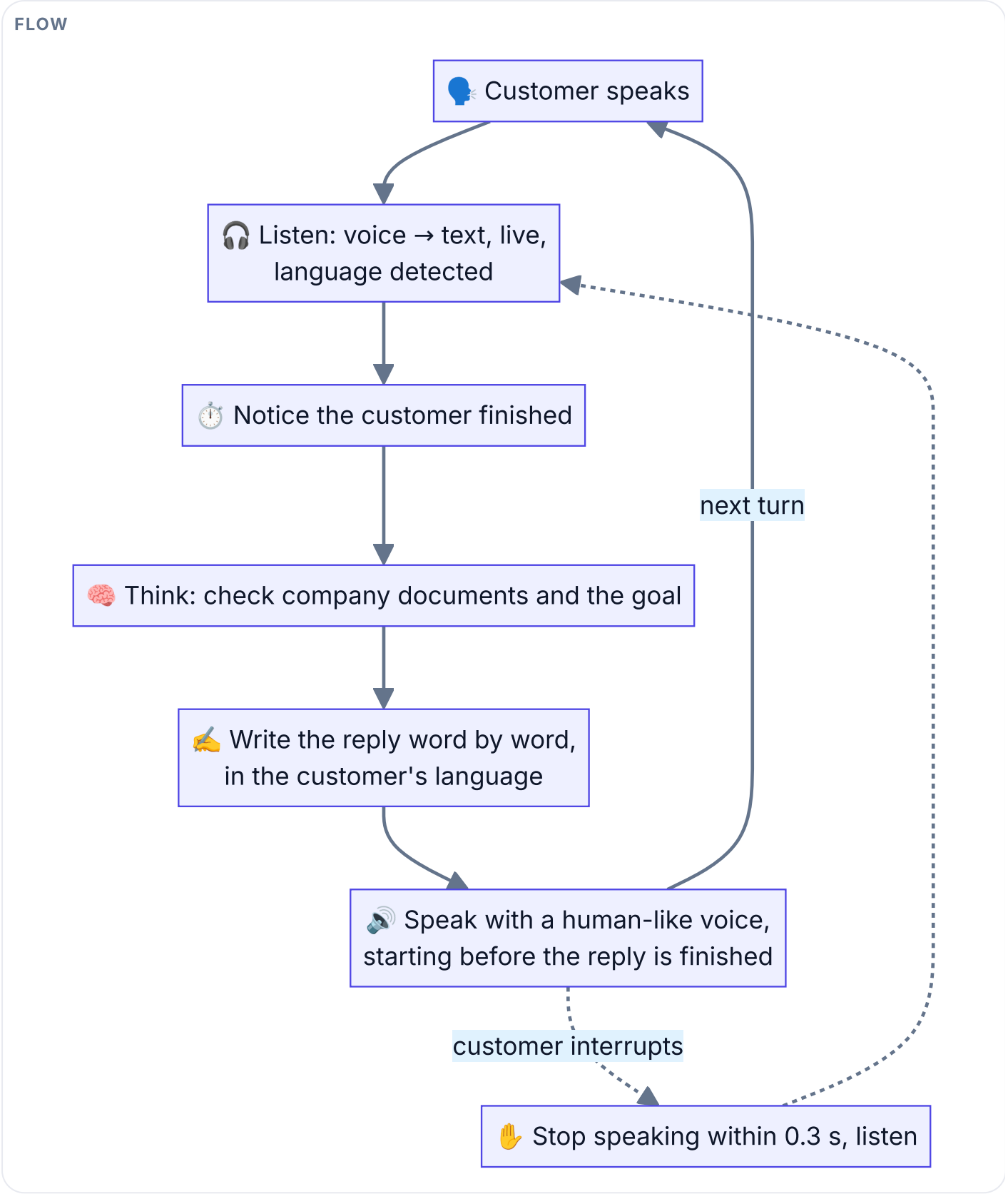


Default outbound rules (each company can change them):

RULE	DEFAULT
First call	Immediately, within calling hours
Calling hours	10:00–19:00 in the customer's time zone, not on holidays
Call language	Form language or preferred language, else company default; still switches if the customer answers in another language
Retries	3 attempts: +1 hour, +4 hours, next day. Stops on “don't call me”
Callback requests	The time the customer asks for becomes a new call
After the last failed attempt	SMS / WhatsApp / email in the customer's language with a link to chat or book
Consent	Required on the form; no consent means no call
Do-not-call	Platform and company lists, plus national registries where required

7. How the assistant talks

7.1 What happens on every turn (voice)

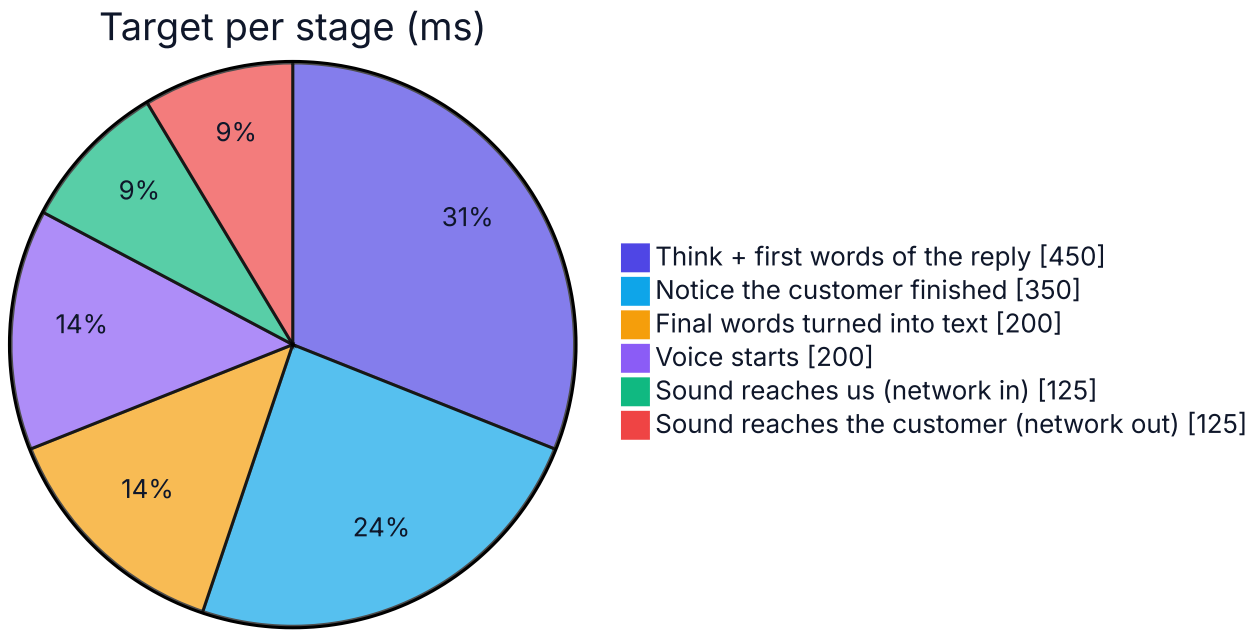


Target: the assistant starts speaking about 1 second after the customer stops. Everything runs as a stream, so it never waits for the full answer before starting to talk.

7.2 Where that one second goes

Targets from the system design; real numbers are measured per language once live. The chart uses the middle of each range (about 1.45 s in total); the goal is a typical reply under 1 second and 95% of replies under 1.6 seconds, in every Tier 1 language.

CHART



STAGE	TARGET	HOW WE KEEP IT FAST
Sound reaches us (network in)	0.05–0.2 s	Voice servers in the callers' region
Notice the customer finished	0.2–0.5 s	Understands the sentence is complete, rather than waiting for a long silence
Turn speech into text	0.1–0.3 s	Text arrives live while the customer is still talking
Look up the answer	mostly hidden	Starts searching while the customer is still speaking
Think and write the first words	0.3–0.6 s	Fast model for live calls; company basics (hours, address) already loaded
Start the voice	0.1–0.3 s	Starts speaking from the first sentence
Sound reaches the customer (network out)	0.05–0.2 s	Same region
Total	**≈ 0.9–1.5 s**	Everything streams; nothing waits for a full response

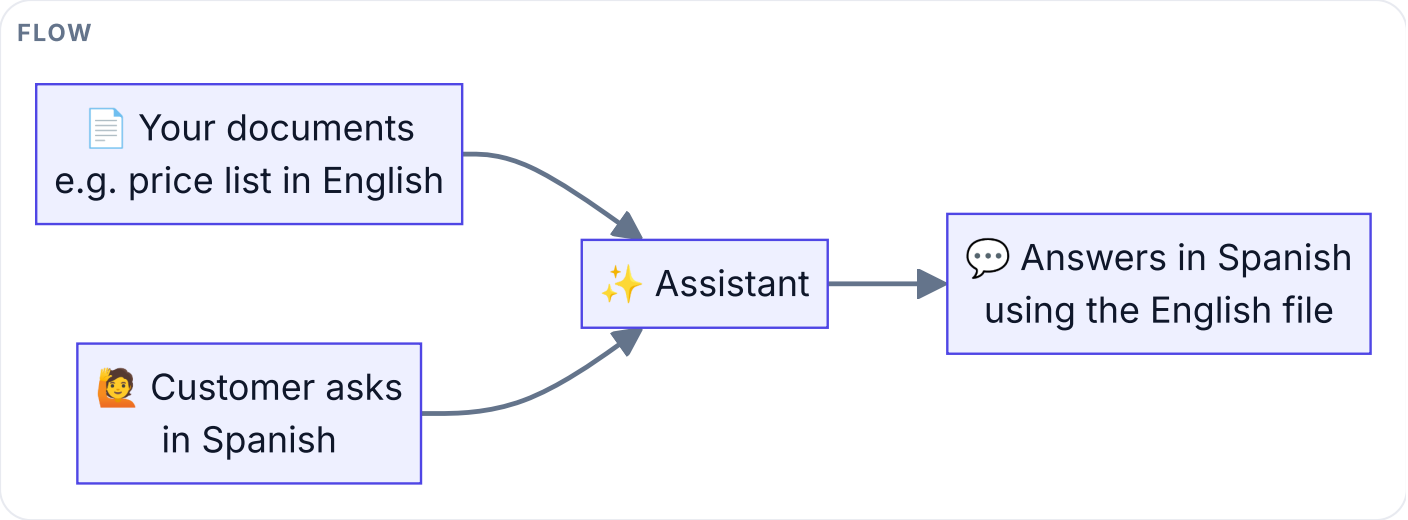
7.3 How it behaves

BEHAVIOUR	EXAMPLE
Speaks the customer's language	Replies in the language used; switches when the customer switches or asks (“Can we speak in Spanish?”).
Answers only from company knowledge	If the answer isn't in the documents, it says so and offers a callback or a person. Works even if documents are in another language.
Short, spoken-style replies on calls	One or two sentences, then a question. Long lists go by SMS/email instead.
Formatted replies in chat	Bullets, links, buttons.
Works toward the goal	Collects the required details one question at a time and skips what it already knows.
Confirms important details	Reads back phones, emails and dates: “That's alex at gmail dot com, right?”
Local formats	Says dates, times, numbers and prices the way people say them in that language.
Handles interruptions	Stops talking as soon as the customer speaks (in under 0.3 s).
Fills silence naturally	“Let me check that for you...” while a lookup takes a moment.
Knows when to hand off	Upset customer, sensitive topic, or “can I speak to a person?” → transfer or callback.
Same assistant everywhere	Same knowledge, persona and rules in chat, web call and phone, in every language.
Says it is an AI	At the start of every call, in the call's language.

8. Multi-language: the core feature

Multi-language is a launch requirement, not an add-on. It applies to every channel.

8.1 The idea in one picture



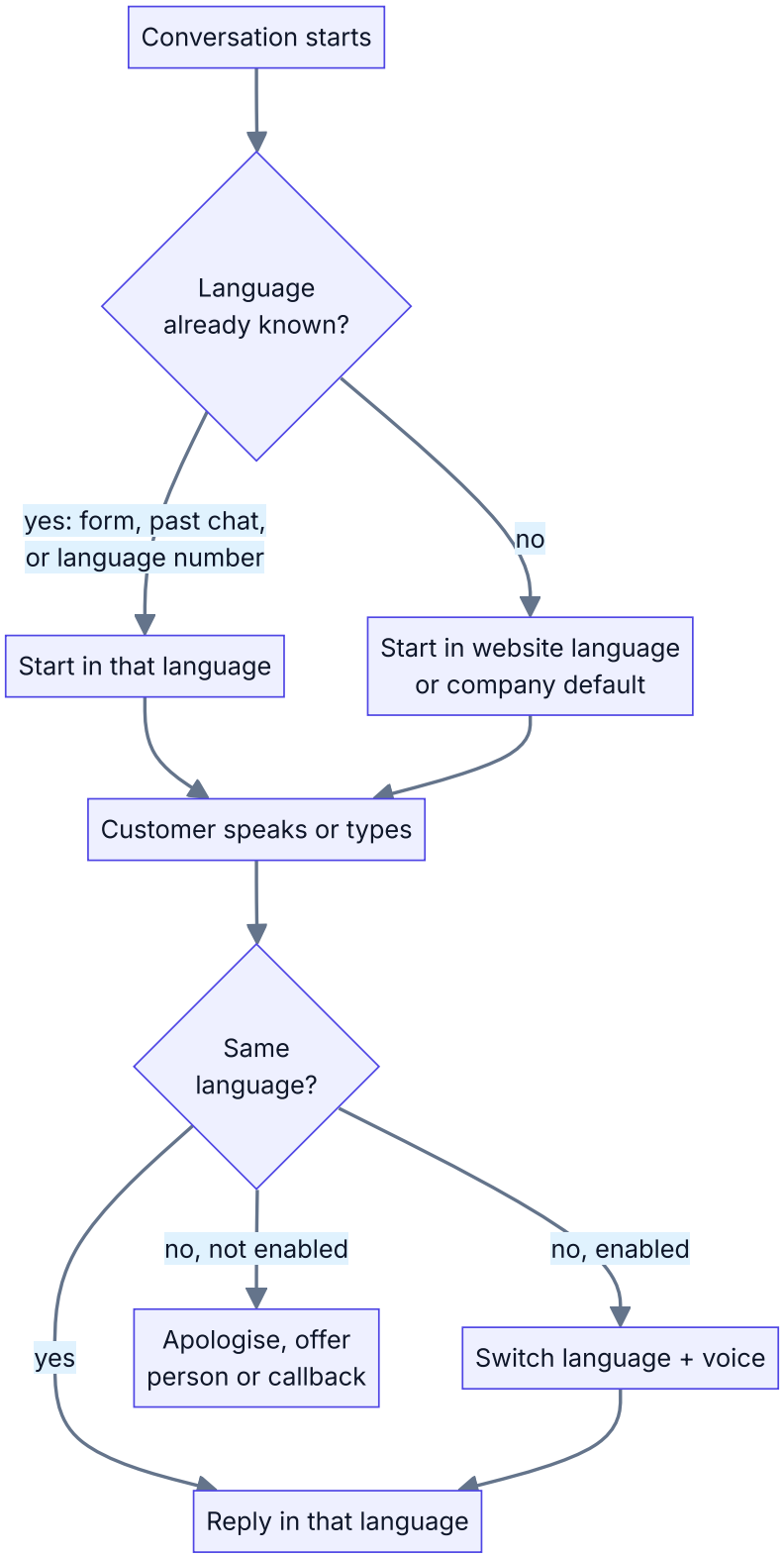
- **Customers never pick a language.** They just speak or type.
- **Your documents can be in any language.** No translation work.
- **Your staff read everything in their own language.**

8.2 Company side

WHAT	HOW
Choose languages	Pick the enabled languages and one default. The platform shows which languages support full voice and which are chat-only for now.
Voices	One voice per language, or one multilingual voice for a consistent persona. Preview each.
Knowledge	Upload in any language. Optional per-language FAQ answers where exact wording matters (legal, medical, pricing).
Greetings, disclosures, messages	Per-language greetings, AI/recording notice, SMS/email templates. Auto-translated drafts the company reviews.
Forms	Hosted forms in each enabled language; the form language becomes the customer's preferred language.
Phone numbers	One number that detects the language, or one number per language.
Human handoff	Optional: send transfers to staff who speak the caller's language.
Reviewing	Staff read each transcript in the original or translated; summaries are written in the staff's language.

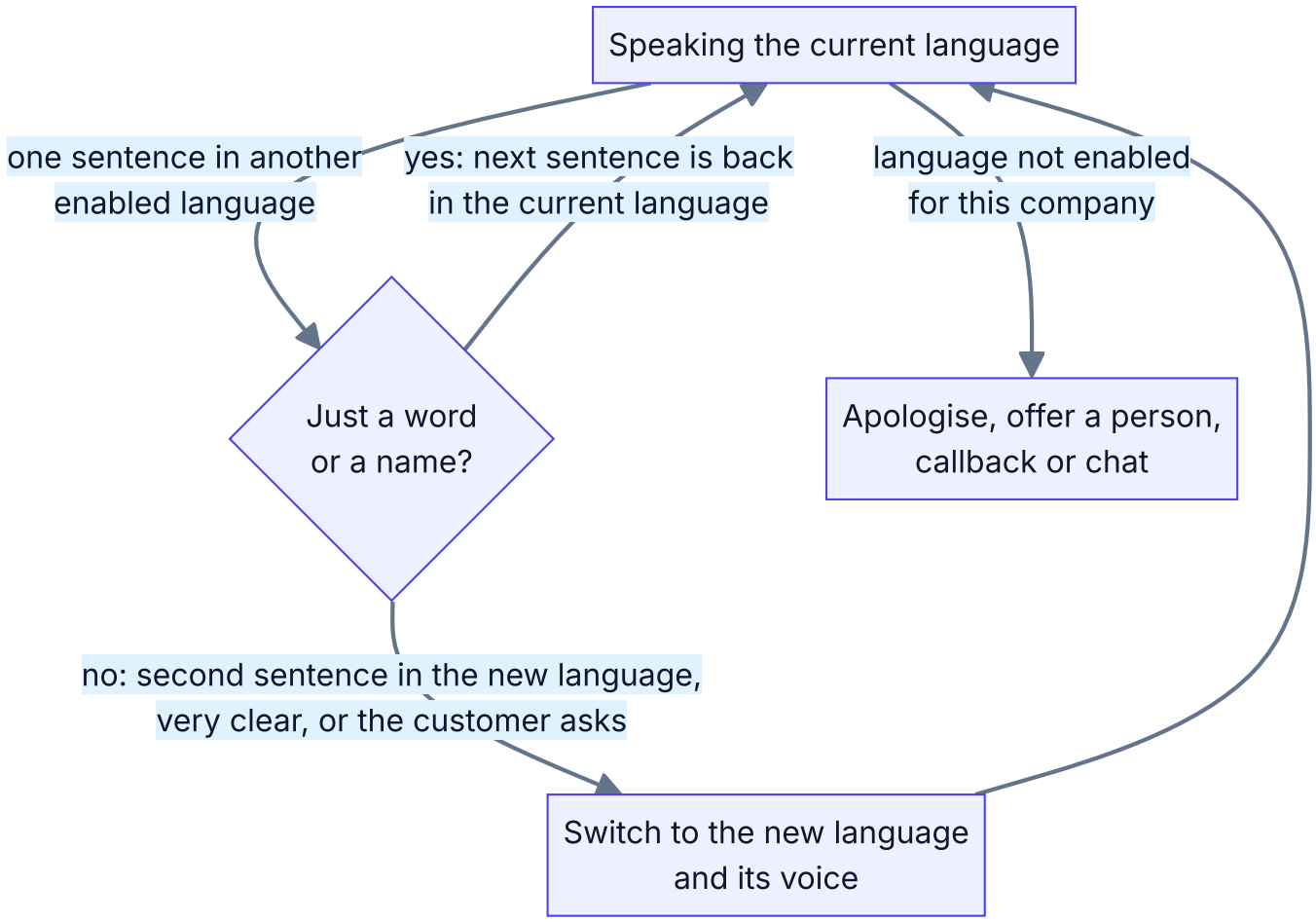
8.3 Customer side: how the language is chosen

FLOW



Switching without flip-flopping. One borrowed word or a name does not trigger a switch. The assistant switches when the customer clearly continues in the new language, or asks for it:

FLOW



- Mixed-language sentences are understood.
- Follow-up SMS, emails and confirmations arrive in the language the customer used.

8.4 Assistant side

- Detects the language on every turn and keeps track of the current one.
- Searches knowledge across languages, then answers in the customer's language, keeping names, prices and product terms exact.
- Uses the voice, greeting and disclosure text for that language.
- Formats numbers, dates, times and currency for that language when speaking or writing.
- Stores the transcript in the original language and records which languages were used.

8.5 Language tiers

Voice quality differs by language and provider, so each language gets a published tier.

TIER	CHAT	VOICE CALLS	WHEN A LANGUAGE GETS THIS TIER
Tier 1	✅	✅ Full quality, ~1 s replies	Passes our test calls for accuracy, natural voice and speed
Tier 2	✅	✅ Marked “beta”, slightly slower (~1.5 s)	Passes with lower thresholds
Tier 3	✅	❌ Offers a chat link or callback instead	Chat quality check only

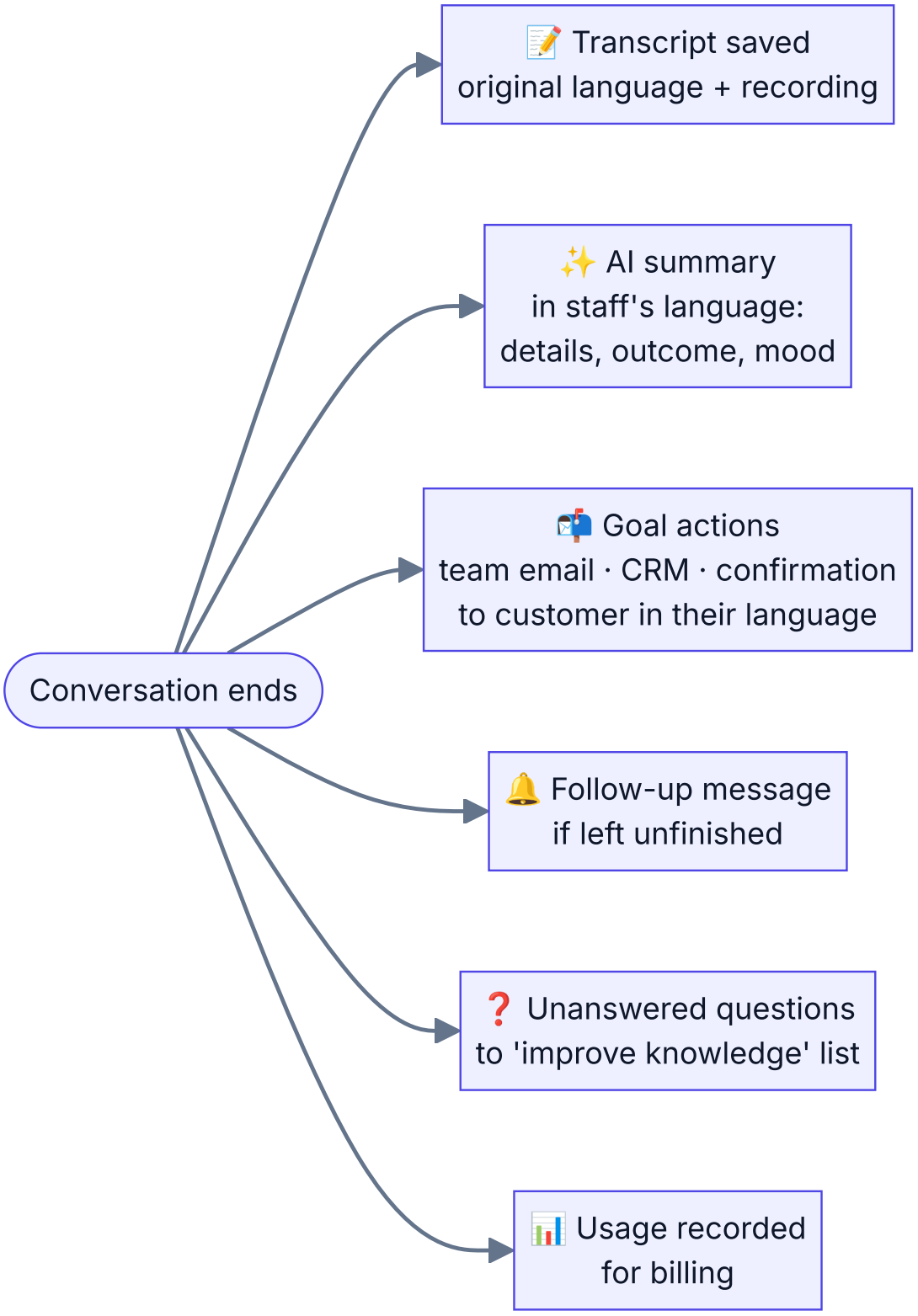
Tiers are reviewed as speech providers improve. Adding a language is a settings change plus testing, not new development.

---

9. After every conversation

All automatic, the moment a chat or call ends.

FLOW



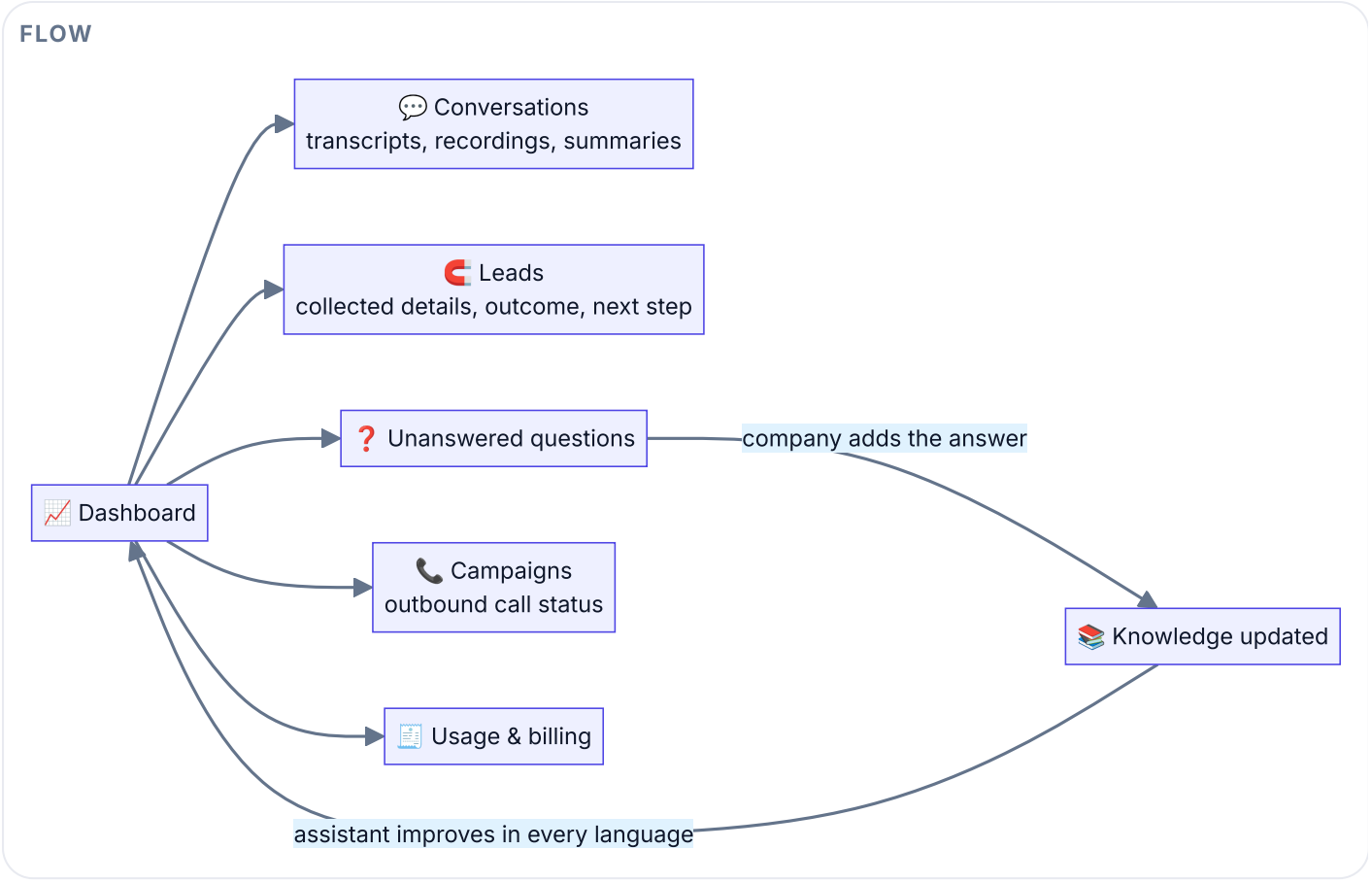
Example summary card (sample data):

FIELD	VALUE
Summary	Alex called about knee pain treatment. Asked about Saturday hours and price. Booked a consultation with Dr. Rao for Saturday 10:30. Prefers SMS reminders.
Channel	AI called back (form)
Language	Spanish → summary written in English
Collected	Name, phone (confirmed), need, slot
Outcome	✅ Booked
Mood	😊 Positive
Sent to	Team email · CRM · SMS to Alex (Spanish)

Possible outcomes: **resolved**, **lead captured**, **booked**, **transferred**, **callback needed**.

---

10. The company dashboard



Screen sketch (numbers are placeholders):

```
┌─ ABC Clinic · Overview ──────────────────────── Last 7 days ─┐
│ ┌────────────┐ ┌────────────┐ ┌────────────┐ ┌────────────┐  │
│ │Conversations│ │Resolved byAI│ │Leads       │ │Avg reply   │  │
│ │   1,284    │ │    82%     │ │    217     │ │   1.1 s    │  │
│ └────────────┘ └────────────┘ └────────────┘ └────────────┘  │
│  Conversations per day          Languages used               │
│   ▆ ▆ ▆ ▆ ▆ ▃ ▂                  EN 52% · ES 26%             │
│   M T W T F S S                  HI 14% · AR 8%              │
│  Unanswered: “Do you accept XYZ insurance?” (23×) [Add answer] │
└──────────────────────────────────────────────────────────────┘
```

VIEW	WHAT THE COMPANY SEES
Conversations	Every chat and call: transcript, recording, AI summary, mood, outcome and language. Other-language transcripts can be shown translated.
Leads	Details collected by the assistant: name, phone, email, need, preferred language, custom fields.
Unanswered questions	Questions the assistant couldn't answer, grouped across languages. Answer once; it works in every language.
Campaigns	Outbound calls from forms: queued, calling, connected, no answer, retry scheduled, done.
Notifications	Email / webhook / CRM push when a lead is qualified or a person is needed.
Usage & billing	Chat messages, web call minutes, phone minutes, numbers; breakdown by language.

11. Safety, privacy and trust

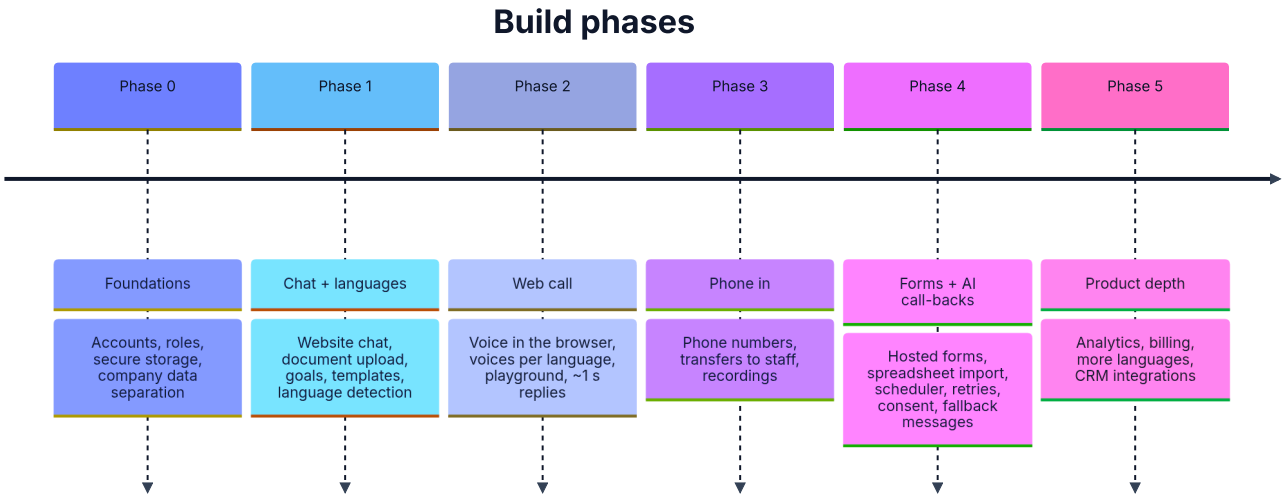
TOPIC	HOW IT WORKS
🤖 **Honest it's an AI**	Every call starts with “I'm an AI assistant and this call may be recorded”, in the call's language.
✅ **Calls only with consent**	The AI only calls people who ticked “you may call me”. The wording, time and language of consent are stored.
🚫 **Do-not-call respected**	Platform and company do-not-call lists; national registries where required.
🕐 **Calling hours**	Only inside allowed hours in the customer's own time zone.
🔒 **Your data stays yours**	Each company's data is fully separated. One company can never see another's documents, calls or customers.
📚 **Answers only from your facts**	The assistant uses your documents and rules. If it doesn't know, it says so and offers a person.
🎙️ **Recordings protected**	Encrypted, viewable only by your authorised staff via short-lived links, deleted on your schedule or on request. Recording can be switched off.
⚖️ **Legal text reviewed by you**	Disclosures and consent wording are never machine-translated without your team approving them.
💸 **Abuse protection**	Rate limits and bot checks on the web call button, a maximum call length, monthly minute caps and daily outbound call caps.

Regional rules (confirmed with legal for each launch country): in the US, AI voice calls need prior express consent and must follow calling-hour rules; in the EU/UK, GDPR applies (lawful basis, deletion requests, data location). Other markets are checked before outbound calling is switched on.

12. How we build it: the roadmap

Each phase ends with something you can see and test. Order matters more than dates; timing depends on team size. **Multi-language is built in from Phase 1, not added at the end.**

TIMELINE



PHASE	WHAT YOU GET	HOW WE KNOW IT'S DONE
0 · Foundations	Accounts and roles, secure storage, company data separation	Data separation tests pass
1 · Chat + languages	Website chat, document upload, goals, templates, language detection, staff translation	A company in any industry goes live from settings alone, chatting in every launch language
2 · Web call	Voice in the browser, voice per language, recordings, test playground	~1 s replies for each Tier 1 language; interruptions and mid-call language switches work
3 · Phone in	Buy/forward numbers, recognise callers, language-matched transfers, keypad input	A real number answers in the right language and transfers; recordings in the console
4 · Forms + AI call-backs	Multilingual hosted forms, spreadsheet import (CSV/Excel/Sheets), Meta lead ads via Zapier/Make, call scheduler, calling hours, retries, voicemail, consent, fallback messages, CSV export	A form submission produces an AI call in the customer's language within the allowed hours
5 · Product depth	Analytics by language, billing, more languages, provider fallback, CRM integrations	Self-serve onboarding without our help; new languages added via settings + testing only

13. Decisions we need from you

Each has our suggested answer. Accept it or change it.

#	QUESTION	WHY IT MATTERS	OUR SUGGESTION
1	**Which languages at launch?**	Decides voice providers, testing and translation work	The languages of your first customers. Full voice only after test calls pass.
2	**Which country / region first?**	Phone providers, speed and legal rules	One region first, chosen by your first customers
3	**Our AI service accounts, or each client's own?**	Asking each company for 4 provider accounts is heavy	We provide and meter them; own accounts as an option
4	**Managed voice hosting or our own servers?**	Speed to launch vs. cost and data location	Managed hosting for launch; self-host later if needed
5	**Record calls by default? How long to keep?**	Storage cost, privacy, industry rules	On, kept 90 days, each company can change it
6	**How does handoff to humans work?**	Not every company has a call centre or multilingual staff	Live transfer if a (language-matched) number is set, otherwise a callback request
7	**Translate every transcript?**	Translation costs money per conversation	Translate when staff open it; summaries always in staff language
8	**How do we price it? Same price for every language?**	Some languages cost more to run	Monthly plan with included minutes/messages + overage; review per-language margins after launch
9	**Calendar / CRM at launch?**	Booking goals need one connected	Simple webhook first, then one calendar provider
10	**Spreadsheet import at launch?**	Most clients already have leads in a sheet	Yes: CSV/Excel import with column matching, in the forms + call-backs phase
11	**Meta lead ads: Zapier or direct?**	A direct connection takes longer to build	Start through Zapier/Make (works today); add a direct connection later

#	QUESTION	WHY IT MATTERS	OUR SUGGESTION
12	**Data export?**	Clients want their data in their own tools	CSV download from day one; live Google Sheets sync as an option

14. Plain-language glossary

TERM	MEANING
Tenant	One company using the platform. Each tenant's data is kept completely separate.
Industry template	A ready-made starting setup for a type of business, with typical questions and goals.
Knowledge	The documents, FAQs and website pages the assistant uses to answer.
Playbook / goal	What the assistant should get done in a conversation, and which details to collect.
Persona	The assistant's name and personality, e.g. “Maya from ABC Clinic, warm and professional”.
Inbound / outbound call	Inbound: the customer calls you. Outbound: the assistant calls the customer.
Handoff / warm transfer	Passing the call to a real person. “Warm” means the staff member first gets a short summary.
Barge-in	When the customer talks over the assistant. It stops and listens.
Latency	The pause between the customer finishing and the assistant replying. Target: about one second.
Speech-to-text / text-to-speech	Turning the caller's voice into text, and the assistant's reply back into a natural voice.
Lead	A potential customer whose details the assistant collected.
Webhook / CRM push	Automatically sending a lead or summary into the company's other systems.
Voicemail detection	Recognising an answering machine on outbound calls and leaving a short message instead.
Consent	The customer's permission to be called, captured on the form with time and wording.

TERM	MEANING
Lead import (CSV)	Uploading a spreadsheet of people who asked to be contacted. Columns are matched once; every row is checked before any call.
Lead source	Where a lead came from: a spreadsheet, a Meta ad, a website form, the CRM, or a chat or call.
Playground	A test area where the company can chat and talk to its assistant before going live.

For the technical design (components, data model, speed budgets and trade-offs), see the separate system design document.

About DevsTree

DevsTree IT Services builds AI-powered web and mobile solutions, process automation and data science products. 500+ projects, 13+ years, 160+ professionals and 7 offices worldwide (Ahmedabad HQ, Richmond TX, London, Gladesville NSW, Brampton ON, Gqeberha, Ho Chi Minh City).

devstree.com · info@devstree.com · +91 92653 20742 · +1 (470) 791-9443 · LinkedIn · Clutch

© 2026 DevsTree IT Services Pvt. Ltd.