Ringo & Crew

HELP GUIDE

Help Guide

Answers to common questions and a step-by-step guide to every screen in Ringo & Crew. The same help is built into the app under Help.

YOUR BUSINESS. LEVELED UP.
Ringo Technologies LLC · Colorado

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INSIDE THIS GUIDE

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01 Getting started

Common questions

How do I set Ringo up?

Open Settings, Setup form. Fill in your services, prices, hours, service area, emergencies and the number Ringo should transfer to. It takes about 10 minutes. Then connect your calendar in Settings, Connections. Ringo & Crew tests Ringo with you on fake calls before real customers hear it.

How do callers reach Ringo?

Either Ringo gets a new local number, or you forward your existing business number to your Ringo number. Your phone company can set up forwarding (always, or only when you don't answer). We send step-by-step forwarding instructions for your carrier.

How do I change what Ringo says?

Settings, Ringo: change your greeting, services, prices, hours, service area and emergency rules, then Save. Ringo uses the new details on the next call.

What are my hours used for?

Ringo only offers appointment times inside your hours. Type them like 8am-5pm, or closed. Pick your time zone under the hours.

02 Ask Ringo (talking assistant)

Common questions

What is Ask Ringo?
Tap the 🎙️ button (bottom right) or press Ctrl+Space, then talk or type. Ask "What's on today?", "Book Maria Lopez Thursday at 2 for a water heater", "Move Tom to Friday at 9", "We're closed December 24", "Assign Tom's job to Jake", "I'm running 20 minutes late" or "Undo that". Ringo answers out loud and in text, in English, Spanish or the language you speak. It is free in every plan except Starter.

Why does it ask for a PIN?
Any change (bookings, hours, assignments, texts) needs your own 6-digit PIN so nobody else can change your business by talking to your phone. Tap 🔒 in the panel. The first time, you create the PIN. It stays unlocked for 10 minutes. Cancelling a job asks for it again. Never say your PIN out loud.

Can I change the voice or name?
Yes. Tap ⚙️ in the panel and pick a voice, then tap Hear it. To change it for your whole team, say "Use the Sarah voice for everyone" or "Call yourself Sam" (needs your PIN).

Can my techs use it?
Yes. Techs signed in with their own login can ask "What's my next job?", say "I'm on my way" or "Mark this job done". They can't see other techs' jobs or change the schedule. Their login email must match their tech profile (Team page).

It misheard me
Say "No, I said fifteen" and it will fix it. Ringo reads back names, times and money before saving. If a change was wrong, say "Undo that" within 15 minutes.

Accessibility
In ⚙️: read replies aloud, hands-free (it keeps listening), slower voice and large text. Everything Ringo says is also shown as text. Works with VoiceOver and TalkBack.

03 Phone app & alerts

Common questions

How do I put Ringo on my phone?
It is free. iPhone or iPad: open app.ringoandcrew.com in Safari, tap Share, then Add to Home Screen, and open Ringo from your home screen. Android: open it in Chrome and tap Install in the bar at the bottom (or the menu, then Install app). App Store and Google Play versions are coming.

How do I turn on alerts?
Open the Ringo app from your home screen and tap Turn on in the bar at the bottom, then Allow. You get a test alert right away. Owners and managers get alerts for new bookings, on my way, job done and anything that needs you.

How do my workers get job alerts?
Office, Crew: add each worker with their own cell phone number and tick the box that they agreed to job texts. They get a welcome text with their own schedule link. When they open it and tap Turn on job alerts (iPhone: add it to the home screen first), their phone alerts them the moment you add, move, change, reassign or cancel one of their jobs. Texts go out as a backup.

Do my workers need a new phone number?
No. Workers keep their own cell numbers. All job texts come from one Ringo texting number, so you never buy numbers for workers. Workers do not need a login either: their schedule link is their key.

Can I stop the extra texts?
Yes. Edit the worker and set Texts to "Only text if phone-app alerts are off". A worker can also reply STOP to stop texts (and START to turn them back on).

Alerts are not showing up
Check that notifications are allowed for Ringo in the phone Settings, that Focus or Do Not Disturb is not hiding them, and on iPhone that Ringo was opened from the home screen (iOS 16.4 or newer). Turn alerts on again from the bar or the schedule link. Texts keep coming either way. Still stuck? Email support@ringoandcrew.com.

04 Calls and booking

Common questions

Where do I see my calls?
The Dashboard lists every call with a summary, the caller's number, what happened and the recording. Click a call for the full transcript.

How does Ringo book jobs?
Ringo checks your connected calendar (Google or Outlook), or your crew schedule if you added techs, offers two open 2-hour arrival windows, and books the one the caller picks. The customer gets a confirmation text and a reminder the day before (Back Office and up).

Can customers move or cancel?
Yes. They can call and ask Ringo, or text the number that texted them. Ringo finds their appointment, offers new times and moves it, or cancels it after they confirm. You get a notification either way.

What happens with emergencies?
Ringo transfers calls that match your emergency rules to your transfer number. After hours, if you set up an on-call rotation (Office, Crew schedule), they go to this week's on-call tech.

What if a caller hangs up?
Ringo texts them back: "Sorry we missed you, reply here with what you need." If they reply, Ringo keeps the conversation going by text and can book them. You can turn this off in Settings, Alerts.

05 Texts

Common questions

Where do I see texts with customers?

Open Texts in the top menu. Every text Ringo sent and every reply is there, grouped by customer. You can type a reply to send from the Ringo number.

When does Ringo stop texting and hand over to me?

If a customer asks for a person, is upset, or Ringo can't help, you get an email and a notification with a link to the conversation. Customers can always reply STOP to stop texts.

06 Office (Back Office and Full Growth)

Common questions

How does crew scheduling work?
Office, Crew schedule: add each tech with their cell, the jobs they do and their hours. Ringo then books each call with a free tech who does that work, preferring one already working nearby. Techs get a text with a job page: directions, call the customer, On my way, and Job done.

How do I bill a customer when the job is done?
Add your payment link (Square, Stripe or QuickBooks) in Office, Invoice reminders. When the tech taps Job done and enters the amount, the customer gets a text with the total and the link, then reminders until you mark it paid.

How do quote follow-ups work?
Office, Quote follow-ups: add the quote with the customer's email or cell. Ringo follows up 2, 5 and 10 days later until you mark it Won or Lost. If they reply yes, you get an email right away.

How do invoice reminders work?
Office, Invoice reminders: add an unpaid invoice, or connect QuickBooks and unpaid invoices appear by themselves. Ringo reminds on the due date, then 7 and 14 days late. Marking it paid also records the payment in QuickBooks.

What is tune-up outreach?
Office, Tune-up outreach: Ringo texts past customers about a year after their last visit and invites them back. Replies come to you.

07 Growth and marketing

Common questions

How do review requests work?
Office, Review requests: save your Google review link, then send requests. Ringo sends one reminder after 4 days if they don't click.

How do I add website chat?
Office, Website chat: copy the one line of code and paste it on your website (or send it to your web person). The chat answers visitors, books appointments and sends you the leads.

How do email promotions work?
Marketing: tell us the offer, and Ringo writes the email and a website banner. You check it, then send or schedule it. Every email has an unsubscribe link and your mailing address, as the law requires.

08 Before you connect Facebook & Instagram

Common questions

What do I need before I connect Facebook?
You must be an admin of your business Facebook Page. During early access, Ringo & Crew first sends you a Facebook "Tester" invite. Accept it before you connect: go to developers.facebook.com, open Requests and click Confirm.

How do I get Instagram ready?
Switch Instagram to a Professional account (Business or Creator). In the Instagram app go to Settings, then Account type and tools. Then link it to your business Facebook Page. You can link it there too, or on Facebook: your Page, Settings, Linked accounts, Instagram.

How do I connect Facebook and Instagram?
Open Settings, Connections. Click Connect next to Facebook & Instagram. Sign in to Facebook as yourself. On each Facebook screen, choose ONLY your business Page (and its Instagram). Then click Save. Connections should now show your Page name.

Facebook says Reconnect. What do I do?
Click Reconnect and sign in to Facebook again. This happens after you change your Facebook password or remove the app in Facebook.

How do I remove Facebook access?
Click Disconnect in Settings, Connections. Or on Facebook go to Settings, then Business integrations, and remove Ringo & Crew.

09 Account and billing

Common questions

How do I add someone from my office?
Settings, Users: invite them by email and pick a role. Admins can change settings; managers see calls and reports.

How do I change my card or see invoices?
Settings, Plan & billing: open the billing portal to update your card or download invoices.

What reports do I get?
A weekly summary every Monday and a monthly report on the 1st: calls, bookings, jobs, quotes won and money collected. Print any report from Print.

How do I get my data or close my account?
Settings, Your data: download everything, or close the account. Billing stops at the end of the period and your data is deleted 30 days later.

How do I reach a person?
Email support@ringoandcrew.com or call (720) 807-0239 (Denver) or (817) 789-6475 (Fort Worth).

10 Screen by screen

Every page of the app, step by step

Dashboard

Your business at a glance: calls Ringo answered, jobs booked, after-hours calls caught and minutes used, plus your setup checklist.

1. Read the number tiles across the top. Click any tile to open the matching printable list.
2. If you see "🚀 Start here", click "Do it" on each step until they are all ticked.
3. Type what you want printed in "Need something printed? Just ask" and click "Show it".
4. Click a row under Recent calls to read the summary, play the recording and see the transcript.

> **Tips:** "🖨 Print call log" prints the recent calls. Hide the Start here card once every required step is done.

If something's wrong

- **No calls listed:** Calls show up after Ringo answers the first one. During setup that is after your test calls.
- **Minutes used looks high:** Every answered call counts, including spam. Extra minutes past your plan are billed per minute; see Settings → Plan & billing.
- **I only see "My jobs" or "Your login isn't linked to a crew member yet":** You are signed in as crew. Your jobs show when your login email matches the email on your crew profile. For the full dashboard, ask an admin for Manager access in Settings → Users.

MANAGERS AND ADMINS SEE THE NUMBERS AND CALLS; CREW LOGINS SEE THEIR OWN JOBS FOR THE NEXT 7 DAYS (MATCHED BY THE EMAIL ON THEIR CREW PROFILE) AND A LINK TO THEIR MY JOBS PAGE

Print

Printable reports: call log, jobs booked, transferred and missed calls, invoices, marketing contacts and campaign results, and your Ringo settings.

1. Pick a report under “What to print”.
2. Set From and To dates when the report has them.
3. Click Update.
4. Click 🖨 Print, or save as PDF from the print dialog.

> **Tips:** On the Dashboard you can type “print last week’s booked jobs” and it opens the right report.

If something's wrong

- **A report is missing from the list:** Invoices and settings need an admin login; contact and campaign reports also need Marketing.
- **“Nothing in this range”:** Widen the From and To dates and click Update.

MANAGERS AND ADMINS (INVOICES, SETTINGS AND MARKETING REPORTS ARE ADMINS ONLY)

Texts

Every text Ringo sent your customers and every reply, one conversation per phone number.

1. Click a conversation in the list on the left.
2. Read the whole thread on the right; your texts are gold, theirs are grey.
3. Admins: type in “Type a reply...” and click Send.
4. Numbers marked “opted out” replied STOP and get no more texts.

> **Tips:** Ringo answers replies by itself and hands over to you when someone asks for a person. Choose which automatic texts go out in Settings → Alerts.

If something's wrong

- **A customer says they got no text:** They may have replied STOP, the number may be a landline, or texting registration is not approved yet (Settings → Texting registration).
- **No conversations:** Texts start once texting is approved for your account.

MANAGERS AND ADMINS (ADMINS CAN REPLY)

Office · Crew

Your techs, the week's jobs and the after-hours on-call rotation. Ringo books calls with a free tech who does that kind of work and texts them the job.

1. Click "+ Add tech" and fill in name, cell phone, the jobs they do, hours and days.
2. Tick that the tech agreed to job texts, then click Add tech.
3. Click "+ Add job" to book a job yourself; pick the start time and tech, then "Save and text the tech".
4. Step through weeks with ◀ ▶ or click Today.
5. Click Edit on a job to change it or cancel it.
6. Under "On call after hours", tick the techs who take turns, in order, and click "Save on-call".

> **Tips:** Techs tap "On my way" and "Job done" from their text; the customer gets an on-the-way text. The on-call rotation switches every Monday. "This week only, use" overrides it for one week. Leave "Does these jobs" blank for a tech who does everything.

If something's wrong

- **"+ Add job" is greyed out:** Add at least one active tech first.
- **A tech can't be put on call:** On-call techs need a cell number so Ringo can transfer emergencies to them.
- **"already has a job" warning:** That tech is booked then. Pick another tech, or confirm Book anyway.
- **Tech isn't getting texts:** Check the cell number and that they agreed to job texts; they may have replied STOP.

ADMINS ONLY · BACK OFFICE PLAN AND UP

Office · Quotes

Log a quote you sent and Ringo follows up by email and text 2, 5 and 10 days later until you mark it won or lost.

1. Open the add box at the top and fill in the customer, email or cell, what it is for and the amount (or line items).
2. Click Save. Ringo starts the follow-ups.
3. When the customer decides, click Won or Lost on the row.
4. Click ✕ to delete a quote.

> **Tips:** Add line items, one per line, to get a 📄 estimate link you can share. Give a cell phone and Ringo texts as well as emails.

If something's wrong

- **Customer got no follow-up:** Check the email or cell on the quote; follow-ups stop when it is marked won or lost.

ADMINS ONLY · BACK OFFICE PLAN AND UP

Office · Invoices

Unpaid invoices with automatic reminders on the due date and 7 and 14 days late, card payments, and billing when a tech finishes a job.

1. Under 💳 Card payments, click the button to connect Stripe so invoices include a “Pay now” card link.
2. Open the add box and fill in the customer, invoice #, amount (or line items), due date and payment link.
3. Click Save. Ringo sends the reminders until you mark it paid.
4. Click “Mark paid” on the row when the money arrives (Reopen undoes it).
5. Under “Bill when the job is done”, paste your payment link and click Save.

> **Tips:** Unpaid QuickBooks invoices show up here by themselves once QuickBooks is connected. When a tech taps Job done and enters the amount, Ringo texts the customer the total and your payment link.

If something's wrong

- **QuickBooks invoices aren’t showing:** Connect QuickBooks in Settings → Connections; they appear after the next sync.
- **Reminders keep going after payment:** Click Mark paid on the invoice.

ADMINS ONLY · BACK OFFICE PLAN AND UP

Office · Money

Money in, money out and profit for this month so far, compared with the same days last month. Paid invoices count as money in by themselves.

1. Open "＋ Add income or expense".
2. Pick Money out (expense) or Money in, a category, the amount and the date.
3. Click Save. The dashboard money card updates right away.
4. Click ✕ on a line to remove it.

> **Tips:** Mark invoices paid on the Invoices tab and they show up here as money in. Add fuel, parts and payroll as you go so profit stays close to real.

If something's wrong

- **Profit looks too high:** Add this month's expenses (parts, fuel, payroll, truck payments).
- **A paid invoice isn't counted:** Check its paid date is this month on the Invoices tab.

ADMINS ONLY · BACK OFFICE PLAN AND UP

Office · Past customers

Tune-up outreach: Ringo texts past customers about a year after their last visit and invites them back.

1. Tick "Turn on tune-up outreach".
2. Set "Text customers this many months after their last visit".
3. Write your message, or leave it blank for the standard one. {name} and {business} fill in.
4. Click Save.

> **Tips:** Replies are emailed to you. Up to 40 texts go out a day.

If something's wrong

- **Nobody has been texted:** Customers need a phone number and a past job date, and texting must be approved for your account.

ADMINS ONLY · BACK OFFICE PLAN AND UP

Office · Email

Your connected mailbox sorted into Customers, Bills and Junk every hour, with reply drafts written for customer emails.

1. Connect Gmail or Outlook in Settings → Connections.
2. Each hour new email is sorted and listed here with a short summary.
3. Open your email app to check and send the drafts Ringo wrote; nothing is sent for you.

If something's wrong

- **Nothing here:** Connect a mailbox in Settings → Connections; sorting starts with new mail.

ADMINS ONLY · BACK OFFICE PLAN AND UP

Office · Reviews

Ask happy customers for a Google review by email, with one reminder.

1. Paste your Google review link (Google Business Profile → Ask for reviews) and click “Save link”.
2. Open “⭐ Send review request”, enter the customer name and email, and save.
3. Watch Sent, Reminder and Clicked in the list.

ADMINS ONLY · FULL GROWTH PLAN

Office · Website chat

A Ringo chat bubble for your website that answers visitors and emails you the leads, plus the chats it had.

1. Copy the one-line code under “Add the chat bubble to your website”.
2. Paste it before </body> on your site, or send it to your web person.
3. Read past conversations under Website chats; you are emailed when a visitor leaves a phone or email.

ADMINS ONLY · FULL GROWTH PLAN

Marketing · Posts

A month of posts for Facebook, Instagram and Google (plus YouTube and TikTok with Marketing Crew). Nothing posts without your OK.

1. Connect Facebook/Instagram and Google in Settings → Connections.
2. Pick the month, add anything to push, and click "✨ Plan the month", or "＋ One post".
3. Open a post, edit the caption, tick where it goes and add a photo or clips from your library.
4. Click Approve. Approved posts go out on their date.
5. Switch to the month view and drag a post to another day to move it.

If something's wrong

- **Posts don't go out:** Check the account shows ✅ connected and the post is approved.
- **A post says "problem":** Open it to read the error; usually the account needs reconnecting.

ADMINS · FULL GROWTH PLAN OR THE MARKETING CREW ADD-ON

Marketing · Photos & clips

Your photos, job clips and music for posts, videos, ads and your logo.

1. Click the upload box to add photos, clips or music.
2. Click "Use as logo" on an image to set your logo.
3. Click "Use as video music" on a track for your videos.
4. Click ✕ to delete one.

ADMINS · FULL GROWTH PLAN OR THE MARKETING CREW ADD-ON

Marketing · Comments

Comments on your Facebook and Instagram posts with drafted replies, and people who might want service flagged.

1. Read the comment and the drafted reply.
2. Edit the reply if needed.
3. Click "Approve and reply" or Skip.

ADMINS · MARKETING CREW ADD-ON

Marketing · Google reviews

New Google reviews with drafted replies.

1. Read the review and the drafted reply.
2. Edit if needed.
3. Click “Post reply” or Skip.

If something's wrong

- **No reviews show:** Connect Google in Settings → Connections.

ADMINS · FULL GROWTH PLAN OR THE MARKETING CREW ADD-ON

Marketing · Email promos

Email promotions to your customers, built for you.

1. Click “＋ New promotion”.
2. Click “✨ Build it for me”, or fill in subject, message and offer yourself.
3. Pick who to send to.
4. Click “Send me a test”, then Schedule or “Send now”.
5. Open a sent one to see results.

> **Tips:** Fill in Sender details first; the mailing address is required by law on promotional email.

If something's wrong

- **Send is blocked:** Add your business mailing address in Sender details.

ADMINS · MARKETING CREW ADD-ON, OR BACK OFFICE AND UP

Marketing · Ad Maker

Make short video ads from your photos and job clips.

1. Pick a style and your photos or clips.
2. Add your headline and offer.
3. Preview, then download or post the ad.

ADMINS · MARKETING CREW ADD-ON, OR BACK OFFICE AND UP

Marketing · My website

A simple one-page website for your business with hours, reviews, a call-back form and the Ringo chat bubble.

1. Fill in the headline, about you and services, or click "✨ Write it for me".
2. Upload your logo, pick a color, and choose what to show.
3. Check the preview.
4. Click "Publish my website".

ADMINS · MARKETING CREW ADD-ON, OR BACK OFFICE AND UP

Marketing · Contacts

Your email list for promotions.

1. Under "Add someone", enter email, name, phone and tags, then click Add.
2. Or use "Import a list" (paste or upload a CSV), tick that they are your customers, and click Import.
3. Search your list.
4. Click Remove to take someone off.

ADMINS · MARKETING CREW ADD-ON, OR BACK OFFICE AND UP

Marketing · Website banner

A promotion banner for your own website.

1. See what is on your website right now.
2. Pick one of the promotions you can show.
3. Click "Copy code" and paste it once into your website.
4. Click "Save website banner".

ADMINS · MARKETING CREW ADD-ON, OR BACK OFFICE AND UP

Marketing · Sender details

Mailing address, reply-to address and website link for your emails.

1. Fill in your business mailing address (required on promotional email).
2. Set where replies go and your website.
3. Click Save.

ADMINS · MARKETING CREW ADD-ON, OR BACK OFFICE AND UP

Settings · Setup form

About 10 minutes: your business, hours, emergencies, phone line, apps and kickoff call. Your answers become Ringo's script.

1. Fill in "1. Your business" (fields marked * are required).
2. Set "2. Hours" and what Ringo does after hours.
3. Under "3. Emergencies", say what counts and the transfer number.
4. Under "4. Your phone line", choose forwarding your number or a new Ringo number, and your calendar.
5. Under "5. Kickoff call", give your best number and times.
6. Tick the terms box and click "Send my setup form".

> **Tips:** You can update it anytime until your kickoff call. After sending, you are taken to Connections to link the apps you ticked.

ADMINS ONLY

Settings · Ringo

How Ringo answers your phone: greeting, services, prices, service area, hours, after-hours and emergency transfers.

1. Under "Receptionist voice", choose a male or female voice. A female voice needs her own name, and she says she is with Ringo & Crew.
2. Edit "Your business": name, trade, greeting, services, prices and service area.
3. Set Hours, time zone and what Ringo does after hours.
4. Say what counts as an emergency and the number to transfer to.
5. Click "Save changes".
6. Click "See Ringo's instructions" to read exactly what Ringo is told.

If something's wrong

- **Ringo gives the wrong hours:** Fix Hours and time zone here and Save; the next call uses them.
- **Saved but Ringo didn't change:** If the toast says your phone line isn't linked yet, Ringo picks it up once setup is finished.

ADMINS ONLY

Settings · Alerts

Who gets a summary after each call, when, and which texts Ringo sends your customers.

1. Enter “Text alerts to” and “Email alerts to” (comma-separated).
2. Tick what to be alerted about: booked, transferred, answered or hung up early.
3. Set Quiet hours (emergencies still come through).
4. Choose the customer texts: missed-call text-back, booking confirmations and day-before reminders.
5. Click “Save alerts”.

> **Tips:** Email alerts work right away; text alerts start once texting is switched on for your account.

ADMINS ONLY

Settings · Connections

Connect your calendar (Google, Outlook, Jobber, Housecall Pro), QuickBooks, email and social accounts. They stay your accounts.

1. Find the app under Your apps, or open “Connect another app”.
2. Click Connect, sign in and click Allow. Housecall Pro asks you to paste an API key.
3. Check it shows Connected. If a calendar has several, pick which one in the menu.
4. Housecall Pro: copy the webhook URL into Housecall Pro (App Store → Webhooks), paste its signing secret, and click Save. Sync now pulls right away.
5. Use Reconnect if it stops working, or Disconnect to remove it.

> **Tips:** Facebook & Instagram: be an admin of your business Page, make Instagram a Professional account linked to that Page, and accept the Facebook Tester invite first. See Help, “Before you connect Facebook & Instagram”. Apps outlined in gold are the ones you said you use on your setup form. With Housecall Pro as your calendar, Ringo offers times that are free in Housecall Pro, books the job there (same customer if the phone or email matches), and moves or unschedules it when a caller reschedules or cancels. Jobs booked in Housecall Pro show up in Crew. Customers with an email are imported into Contacts. Techs are matched to Housecall Pro employees by cell, email or name.

If something's wrong

- **Shows Upgrade instead of Connect:** That connection needs a bigger plan or the Marketing Crew add-on.
- **Reconnect needed:** Click Reconnect and sign in again; access ends when a password changes.
- **Housecall Pro key refused:** The API key needs the Housecall Pro MAX plan (App Store → API → Generate API key).
- **Housecall Pro changes are not showing in Ringo:** Under Housecall Pro, open “Turn on live updates”: paste the webhook URL in Housecall Pro (App Store → Webhooks) and save the signing secret here. Click Sync now to pull right away; Ringo also checks every hour.

ADMINS ONLY

Settings · Users

The people who can sign in and what they can see.

1. Under “Add someone”, enter Name and Email.
2. Pick Access: Manager (dashboard and calls) or Admin (everything, including settings).
3. Click “Send invite”; they get a sign-in email.
4. Change someone’s access in the menu on their row.
5. Click Remove to turn off a login (Restore brings it back).

> **Tips:** Techs don’t need a login: they get jobs by text on the Office → Crew tab.

ADMINS ONLY

Settings · Texting registration

Phone carriers require every business that texts customers to be registered. Fill this in so Ringo’s texts are delivered from your number.

1. Enter your legal business name exactly as on your EIN letter, business type and EIN.
2. Fill in address, website and contact details.
3. Write a sample text you send customers.
4. Click Save. We register you; carriers usually approve in 1 to 3 weeks.

If something's wrong

- **Status says “Needs a fix”:** We will contact you; usually the legal name or EIN doesn’t match the IRS record.

ADMINS ONLY

Settings · Plan & billing

Your plan, the Marketing Crew add-on, your card and invoices.

1. Compare Front Desk, Back Office and Full Growth; click “Ask about switching” to change.
2. Ask about adding Marketing Crew in its box.
3. Click “Manage card, invoices and receipts” to update your card (or “Pay securely” for the first payment).
4. Download or email a copy of an invoice from the list.

If something's wrong

- **Ringo is paused:** A payment didn’t go through. Update your card and Ringo turns back on automatically.

ADMINS ONLY

Settings · Your data

Download everything, or close your account.

1. Click “Download my data” for one file with settings, calls, contacts, campaigns and invoices.
2. To close the account, type your company name and click “Close my account”.

> **Tips:** Billing stops at the end of the period; turn off call forwarding to your Ringo number. Data is deleted 30 days after closing.

ADMINS ONLY

Team · Timesheets

Hours for each tech in the pay period: clocked time, job and drive time, overtime, approval and lock.

1. Use ◀ and ▶ to pick the pay period.
2. Click Entries on a tech to see each clock-in, job and drive, and Edit or ✕ to fix one.
3. Open “＋ Add time” to add missing hours for a tech.
4. Click Approve, then Lock once payroll is sent. Unlock asks for a reason.
5. Click “🔢 Shop kiosk” to let techs clock in with a PIN on a shop tablet.

> **Tips:** Techs clock in, take breaks and clock out from their “My jobs” link. On my way starts drive time, Start work starts job time, Job done stops it. A locked period can’t be edited.

If something's wrong

- **A tech shows “Still on the clock”:** They forgot to clock out. Click Entries, then Edit and set the end time.
- **Gross pay is empty:** Add the tech’s pay rate in Payroll & rules (admins).

MANAGERS AND ADMINS · BACK OFFICE PLAN AND UP

Team · Tasks

Jobs-around-the-job for your crew: restock the van, drop off paperwork. Assign, set a due time, repeat, and ask for a photo.

1. Open "＋ Add a task", type it, pick the tech (or Any tech), due date and how it repeats.
2. Tick "Needs a photo to finish" for photo proof.
3. The tech gets an alert and checks it off from their "My jobs" link.
4. Use 💬 to add a note, 📷 to add a photo, Done to check it off.

> **Tips:** Repeating tasks make the next one when this one is done. Overdue tasks alert you and the tech once.

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Team · Payroll & rules

Send approved hours to payroll, import hours from other apps, set pay rates and PINs, and choose overtime and pay period rules.

1. Pick the pay period and click the file for your payroll app (Gusto, ADP, QuickBooks Payroll, Paychex).
2. Admins: Send to QuickBooks or Gusto straight from here.
3. Import a Homebase, 7shifts or When I Work timesheet CSV.
4. Set each tech's pay rate, payroll ID and clock-in PIN, then Save.
5. Pick the pay period and overtime rule (federal, Colorado, California) and Save rules.

If something's wrong

- **A tech was skipped when sending:** Their name must match the employee name in QuickBooks or Gusto.

MANAGERS AND ADMINS · BACK OFFICE PLAN AND UP (RATES, RULES AND SENDING TO PAYROLL: ADMINS)

Team · Change history

Who changed what and when: time, timesheets, tasks, techs, jobs, quotes, invoices, rules, API keys and webhooks.

1. Pick a type, a person, dates or search words and click Filter.
2. Read each change as old value → new value, with the reason given.

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Insights

How the business is doing: revenue by period, tech and job type, jobs completed, average ticket and quote close rate, compared with an earlier period.

1. Pick the dates (or From and To) and what to compare with, then Update.
2. Read the tiles; the arrows show the change.
3. Scroll to By tech and By job type; ⬇ CSV downloads a table.

> **Tips:** Revenue is invoices marked paid. Invoices made when a tech taps Job done count for that tech. Close rate is quotes won out of quotes sent in the dates.

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Settings · API & webhooks

Let Zapier, Make, n8n or your own code read and create jobs, customers, quotes and invoices, and get told when things happen.

1. Name a key, pick read only or read and write, and click “Make a key”. Copy it right away.
2. Paste a webhook URL, tick the events and click “Add webhook”.
3. Click “Send test” to check it, and watch the Delivery log.
4. Read the API docs for the details.

> **Tips:** Revoke a key the moment it may have leaked. Failed deliveries retry for about a day.

ADMINS ONLY · BACK OFFICE PLAN AND UP

Help

Ask a question, search every page guide, read common answers, or contact support.

1. Ask a question in the box at the top and click Ask.
2. Type in “Search the page guides”.
3. Click Guide to read one, or Go to open that page.

EVERYONE ON THE ACCOUNT

All customers

Ringo & Crew staff view: every customer, plan, status, setup progress and texting registration.

1. Launch a customer from their setup checklist: 👁 Preview dashboard (read-only, then ✅ Approve or ↻ Redo), 🧪 Run launch test (fix anything marked ❌), then 🚀 Publish to customer to set them active and email their sign-in and walkthrough link.
2. Read the Overview numbers and What's next.
3. Click a setup count to open the setup checklist.
4. Click Open to view a customer as staff; "Back to all customers" returns here.
5. Use "Add a customer" to create one and send the welcome email.

RINGO & CREW STAFF (SUPERADMIN)

We're here to help.

Ringo & Crew

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