Ringo & Crew

SETUP GUIDE

Setup Guide

Everything you need to go from sign-up to Ringo answering your calls, one clear step at a time.

YOUR BUSINESS. LEVELED UP.

Ringo Technologies LLC · Colorado

November 2026
Edition 1

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01 Before you start

What to have ready

Setting up Ringo & Crew takes about 30 minutes of your time. Have these ready:

- [ ] Your business email (you sign in with a 6-digit code sent to it: no passwords to remember)
- [ ] Your services and typical prices
- [ ] Your business hours, holidays and service area
- [ ] Who should get urgent calls, and the phone number Ringo should transfer them to
- [ ] Access to your calendar (Google or Outlook), Jobber or Housecall Pro and other apps you use
- [ ] Your phone company login, if you'll forward your existing number to Ringo

> **Tip:** Nothing is live until you approve it. You can change everything later in Settings.

02 Sign in for the first time

Secure sign-in with an emailed code

1. **Open your welcome email**
   It has your link to **app.ringoandcrew.com** and a link to book your walkthrough call.

2. **Enter your email and press Email me a code**
   A 6-digit code arrives within a minute. Check Junk if you don't see it.

3. **Type the code**
   You stay signed in for 30 days on that device.

4. **Accept the Terms of Service and Privacy Policy**
   One time only.

> **Security:** Ringo & Crew never uses passwords. Only the person with your inbox can sign in.

03 Fill in your setup form

About 10 minutes. Your answers become Ringo's script.

Open **Settings → Setup form** and work through each part:

1. **Your business**
   Name, address, website and a short description, the way you'd describe it to a new employee.
2. **Hours**
   Your weekly hours and time zone. Ringo only offers times inside your hours.
3. **Services and prices**
   What you do and what you charge (or "free estimate"). Ringo only quotes what you list.
4. **Emergencies and transfers**
   Which calls go straight to a person, and the number to send them to.
5. **Phone line**
   Choose a new local Ringo number or forwarding from your existing number.
6. **Apps and kickoff call**
   Tick the apps you use and pick a time for your kickoff call.

04 Connect your phone line

Two ways to have Ringo answer

Option A: a new Ringo number

We give you a local number. Put it on your website, Google profile and truck or storefront. Calls ring straight to Ringo.

Option B: forward your number

Keep your number. Ask your phone company to forward calls to your Ringo number, either always or only when you don't answer. We send step-by-step instructions for your carrier.

Test it: after forwarding, call your business number from another phone. Ringo should answer with your greeting.

05 Connect your apps

Your accounts stay yours

Open **Settings → Connections**. Find your app and press **Connect**, then sign in to that app and allow access.

Connect	What it does
Google or Outlook Calendar	Ringo books into your real calendar and never double-books.
Jobber / Housecall Pro	Jobs Ringo books appear in your field-service app.
QuickBooks	Unpaid invoices appear for automatic reminders.
Stripe	Card payment links on invoices.
Facebook & Instagram, Google	Posts, comments and reviews (Full Growth or Marketing Crew).

> **Facebook:** during early access you'll get a Facebook "Tester" invite first. Accept it, then press Connect and choose only your business Page.

06 Alerts, people and the phone app

Stay in the loop wherever you are

1. **Choose your alerts**
   Settings → Alerts: who gets a text or email after each call, and for which kinds of calls.

2. **Add your team**
   Settings → Users: invite people by email. Admins can change settings; managers see calls and reports.

3. **Put Ringo on your phone (free)**
   iPhone/iPad: open app.ringoandcrew.com in Safari → Share → Add to Home Screen. Android: open it in Chrome → Install.

4. **Turn on notifications**
   Open Ringo from your home screen and tap Turn on → Allow. A test alert arrives right away.

5. **Add your crew**
   Office → Crew: add each tech with their cell and tick that they agreed to job texts. They get their own schedule link. No logins or new numbers needed.

07 Test, approve and go live

We check everything with you before customers call

1. **Preview**
   We walk through your dashboard together and you approve it or ask for changes.
2. **Launch test**
   We run a full test: voice, greeting, phone number, booking, alerts and the call summary.
3. **Your test call**
   Call your Ringo number and ask what a real customer would ask. Book a test appointment, then cancel it.
4. **Go live**
   You get an email confirming Ringo is answering, with a link to book your walkthrough.

> **Ringo off switch:** you can pause Ringo any time and calls go straight to your transfer number.

08 Your launch checklist

Tick these off and you're done

- [ ] Signed in with my emailed code and accepted the Terms
- [ ] Setup form complete: business, hours, services, emergencies
- [ ] Phone line: new Ringo number in use, or forwarding turned on and tested
- [ ] Calendar connected and a test booking showed up
- [ ] Other apps connected
- [ ] Alerts set: I got a call summary by text or email
- [ ] Team invited
- [ ] Ringo installed on my phone with notifications on
- [ ] Test call made: greeting, booking and transfer all worked
- [ ] Walkthrough call booked
- [ ] Ringo number on my website, Google profile and signs

Need a hand?

Press **Help** in the app to ask Ringo a question, search every page guide, or contact support. We answer quickly.

We're here to help.

Ringo & Crew

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💻 Sign in: app.ringoandcrew.com

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