Ringo Office

HELP GUIDE

Help Guide

Answers to common questions and a step-by-step guide to every screen in Ringo Office. 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. Pick your type of office, then fill in what you do, your fees, hours, common questions, what counts as urgent and the number Ringo should transfer urgent calls to. It takes about 10 minutes. Then connect your calendar (Google or Outlook) in Settings, Connections: this is required, because Ringo can only book into your own calendar. Until it is connected, Ringo offers to transfer callers or tells them the office will call back. We test Ringo with you on practice calls before any client hears it.

How do callers reach Ringo?

Either Ringo gets a new local number, or you forward your existing office number to your Ringo number. We recommend forward on no answer and forward when busy (so your staff still pick up first), plus all calls after hours. Your phone company can set it up in a few minutes.

How do I forward my office phone to Ringo?

Most systems call it "call forwarding", "forward on no answer" or "call handling". RingCentral: Admin Portal (or the app), your extension, Call Handling & Forwarding, add your Ringo number under "When I am unavailable" or After Hours rules. Vonage Business: admin portal, Call Forwarding / Call Continuity or Never Miss a Call, set to forward on no answer or busy. Nextiva: NextivaONE or the voice portal, Call Forwarding, turn on When No Answer and When Busy (and a schedule for after hours). 8×8: Work app or Admin Console, Call Forward, set No Answer and Busy rules. Comcast Business VoiceEdge or Business Voice: Voice Manager online, Call Forwarding Selective / No Answer. AT&T, Verizon and other business desk lines: dial *72 then the Ringo number to forward all calls (*73 to stop); for no-answer or busy forwarding ask the carrier or use their online portal. Test it by calling your office number from a cell phone.

How do I change what Ringo says?

Settings, Ringo: change your greeting, what you do, fees, address, common questions, hours and urgent rules, then Save. Ringo uses the new details on the next call. "Fill in the suggested answers" loads starter answers for your type of office.

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 and appointment length under the hours.

02 Privacy

Common questions

What does Ringo Office keep about callers?
Nothing that identifies them. We keep the time, length, a topic (like new client or scheduling) and the result of each call. No names, phone numbers, call summaries, transcripts or recordings. Settings, Privacy shows the full list.

What does Ringo never ask callers?
It depends on your type of office and is shown in Settings, Ringo. For example: no Social Security numbers or income for CPAs, no policy numbers for insurance, no case facts for law offices, and nothing personal for coaches. If a caller starts sharing, Ringo politely stops them and says your office will go over it privately.

Then how do I know who booked?
Appointments go straight into your own calendar with the name, callback number and appointment type. That information lives in your calendar, not with us.

How do new clients give me their details?
Add your own secure new-client form in Settings, Ringo. Ringo tells new callers the office will send it. Ringo never collects intake details by phone.

Does Ringo tell callers it is an AI?
Ringo greets callers by name like a front-desk person. If a caller asks, it always says honestly that it is an AI assistant.

Can I use Ringo Office for a medical or therapy practice?
No. Ringo Office does not sign HIPAA business associate agreements, so it is not for doctors, dentists, therapists or other health practices.

03 Calls and booking

Common questions

Where do I see my calls?
The Dashboard shows calls in the last 7 days, appointments booked, after-hours calls, what callers wanted, your busiest hours and recent calls by topic and result.

How does Ringo book appointments?
Ringo checks your connected Google or Outlook calendar, offers two open times inside your hours, and books the one the caller picks. Connecting a calendar is required for booking. Without one, Ringo never pretends to book: it offers to transfer, or tells the caller the office will call back, and you get a "caller asked for a call back" alert. If you use another scheduler (Clio, ezyVet, Calendly), add your online booking page and Ringo points callers to it.

Can callers move or cancel?
Ringo offers to transfer them, or tells them the office will call back. Your office handles the change in your own calendar.

A caller asked for a call back. How do I find them?
Ringo Office keeps no names or numbers. The alert tells you the time of the call: check your voicemail and your phone system's caller ID or call history for that time.

What happens with urgent calls?
Ringo transfers calls that match your urgent rules to your transfer number, saying only "urgent call" so nothing private is repeated. Vet clinics can send after-hours emergencies to the nearest 24-hour hospital. Callers in crisis are pointed to 988 or 911.

What if a caller hangs up?
It counts as a missed call on your dashboard. Ringo does not text them back, because that would mean keeping their number.

04 Phone app & alerts

Common questions

How do I put Ringo on my phone?

It is free. iPhone or iPad: open app.ringooffice.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.

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. Settings, Alerts picks what you are alerted about. Alerts never include caller details.

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. Still stuck? Email support@ringooffice.com.

05 Growth and marketing (Full Growth)

Common questions

What is included?
A one-page website built from your office details, a video ad maker, social posting you approve, and Google Business Profile updates. Nothing posts without your OK.

How do promotions work?
Marketing, Promotions: tell us the offer and Ringo writes a website banner for you. Ringo Office keeps no client lists, so it does not send promotional email.

How does website chat work?
Marketing, Website chat: paste one line on your website. Ringo answers visitors' questions from your office details. If someone asks for a call back, Ringo emails your alert address once and keeps nothing. You see counts only.

06 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 Office 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 (the app that posts for Ringo Office).

07 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 one on the 1st, plus any report from Print: calls, appointments booked, transfers, call-back requests and missed calls, all without caller details.

How do I get my data or close my account?
Settings, Your data: download everything Ringo Office keeps (settings, users, the anonymous call log, appointment counts and your invoices), 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@ringooffice.com or call (720) 405-2375 (Denver) or (817) 753-1403 (Fort Worth).

08 Screen by screen

Every page of the app, step by step

Dashboard

Your office at a glance: calls answered, appointments booked, after-hours calls caught and minutes used, with anonymous insights. Ringo Office never stores caller names, phone numbers, what was said, transcripts or recordings.

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. Read “What callers want” and “Busiest hours” to plan front-desk coverage and lunch breaks.
4. Type what you want printed in “Need something printed? Just ask” and click “Show it”.
5. Recent calls show only the time, topic, length and result.

> **Tips:** Appointments go straight into your own calendar; the app keeps only a count by day and type. Spam and robocalls are labelled and not billed.

If something's wrong

- **I want to see who called:** By design Ringo Office keeps no caller names or numbers. The caller’s name and callback number are in the appointment in your own calendar.
- **No insights yet:** Insights appear once there are calls in the last 30 days.
- **No calls listed:** Calls appear after Ringo answers the first one; during setup that is after your test calls.

MANAGERS AND ADMINS SEE THE NUMBERS; OTHER LOGINS SEE A PLACEHOLDER FOR NOW

Print

Printable reports: call log, appointments booked, transferred and missed calls, invoices 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:** Call reports show times, topics and results only: no caller details are kept.

If something's wrong

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

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

Marketing · Posts

A month of posts for Facebook, Instagram and Google. 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 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.

> **Tips:** Never post client names, cases or account details.

If something's wrong

- **Posts don’t go out:** Check the account shows ✅ connected and the post is approved.

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

Marketing · Photos & clips

Your office photos, 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.
4. Click ✕ to delete one.

> **Tips:** Don’t upload client documents or photos of clients without written permission.

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

Marketing · Comments

Comments on your Facebook and Instagram posts with drafted replies.

1. Read the comment and the drafted reply.
2. Edit the reply; never confirm someone is a client in public.
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: thank them without confirming any client details.
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 · Promotions

Email newsletters and promotions to clients who agreed to hear from 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. Only email people who agreed to hear from you.

If something's wrong

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

ADMINS · MARKETING CREW ADD-ON, OR FULL GROWTH

Marketing · Ad Maker

Make short video ads from your photos and 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 FULL GROWTH

Marketing · My website

A simple one-page website for your office 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".

> **Tips:** Point new clients to your own secure intake form rather than collecting details on the website.

ADMINS · MARKETING CREW ADD-ON, OR FULL GROWTH

Marketing · Contacts

Your email list for newsletters and promotions. Separate from callers: Ringo never adds callers here.

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 agreed to hear from you, and click Import.
3. Search your list.
4. Click Remove to take someone off.

ADMINS · MARKETING CREW ADD-ON, OR FULL GROWTH

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 FULL GROWTH

Marketing · Website chat

Put a Ringo chat bubble on your website so visitors can ask questions and request a call back.

1. Copy the one-line snippet in the box (click it to select it all).
2. Paste it just before </body> on your website, or send it to your web person.
3. Visit your site and open the chat bubble to test it.
4. Check this tab for chats and call-back requests this month.

> **Tips:** Chat never asks for or stores client case details; it takes a name and phone for a call back. Call-back requests are emailed to you.

If something's wrong

- **The bubble doesn’t show:** Make sure the snippet is on the page and not blocked by a site builder setting; try a private window.
- **No call-back emails:** Check Settings → Alerts for your alert email and look in spam.

ADMINS · FULL GROWTH

Marketing · Sender details

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

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

ADMINS · MARKETING CREW ADD-ON, OR FULL GROWTH

Settings · Setup form

About 10 minutes: your office, hours, urgent calls, phone line, calendar and kickoff call. Your answers become Ringo's script.

1. Fill in "1. Your business": office name, type of office, what you do, fees, address and common questions (* is required).
2. Add your online scheduling page and your secure new-client form if you have them.
3. Set "2. Hours" and what Ringo does after hours.
4. Under "3. Urgent calls", say what counts and the transfer number.
5. Under "4. Your phone line", choose forwarding your number or a new Ringo number, and your calendar.
6. Under "5. Kickoff call", give your best number and times.
7. Tick the terms box and click "Send my setup form".

> **Tips:** You can update it anytime until your kickoff call. Ringo never takes new-client details on the phone: it sends callers to your secure form.

ADMINS ONLY

Settings · Ringo

How Ringo answers: office type, greeting, what you do, fees, directions, common questions, hours, appointment length, booking and urgent 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 Office.
2. Pick your Type of office; the 🔒 note shows what Ringo will never ask for or repeat.
3. Click “Fill in the suggested answers for this type of office” to start from our wording.
4. Edit the greeting, what your office does, fees, directions and common questions (one per line).
5. Set Hours, time zone, appointment length, your online scheduling page and secure new-client form.
6. Choose what Ringo does after hours and who gets urgent calls.
7. Click “Save changes”.
8. Click “See Ringo’s instructions” to read exactly what Ringo is told.

> **Tips:** Ringo books into your own Google or Outlook calendar with only a name, callback number and appointment type.

If something's wrong

- **Ringo gives the wrong hours:** Fix Hours and time zone here and Save; the next call uses them.
- **Suggested answers replaced my text:** The button asks first; retype or reload before saving to undo.

ADMINS ONLY

Settings · Privacy

Exactly what Ringo Office keeps and what it never stores, and what Ringo will never ask callers for.

1. Read the table: caller names, numbers, call details, transcripts and recordings are never stored.
2. Appointments go only into your own calendar; new-client intake goes through your own secure form.
3. Only call time, length, topic category and result are kept, for your dashboard.
4. Check the line “On the phone, Ringo never asks for or repeats...” for your type of office.

> **Tips:** Ringo Office is not built for medical or therapy practices and does not sign HIPAA business associate agreements. Law offices: Ringo takes no case facts, so conflict checks and privileged conversations stay with you.

If something's wrong

- **Secure form link is missing:** Add “Your secure new-client form” in Settings → Ringo.
- **I need to delete everything:** Use Settings → Your data to download it or close the account.

ADMINS ONLY

Settings · Alerts

Who gets a short note after each call, when, and which texts go to callers.

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 (urgent calls still come through).
4. Review the caller texts. Missed-call text-back stays off in Ringo Office because it would keep the caller’s number.
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 Google or Outlook calendar and, with Marketing, your 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.
3. Check it shows Connected; if you have several calendars, pick which one in the menu.
4. 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”. Connect your calendar so Ringo can book appointments straight into it.

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.

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 access in the menu on their row; click Remove to turn off a login (Restore brings it back).

> **Tips:** Give Admin only to people who should change privacy and phone settings.

ADMINS ONLY

Settings · Plan & billing

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

1. Compare the plans; 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 the app holds, or close your account.

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

> **Tips:** The call log holds only times, topics and results. Billing stops at the end of the period; turn off call forwarding. Data is deleted 30 days after closing.

ADMINS ONLY

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 Office staff view: every office, plan, status and setup progress.

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 an office as staff; "Back to all customers" returns here.
5. Use "Add a customer" to create one and send the welcome email.

RINGO OFFICE STAFF (SUPERADMIN)

We're here to help.

Ringo Office

🌐 ringooffice.com

✉️ support@ringooffice.com

📞 Denver (720) 405-2375 · Dallas/Fort Worth (817) 753-1403

💻 Sign in: app.ringooffice.com

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