RINGURA TRAINING

# Administrator guide

Set up a Ringura desk from an empty account to the first call, in the order the steps depend on each other, with a link to the detailed guide for each.

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## Steps

1. **Know the order and why it matters**

   Each step below needs the one before it. Calls open only after your company is verified (KYB). Numbers, plans and calls are paid from a prepaid wallet, so the wallet needs credit before you buy. Extensions, queues, numbers and caller IDs reach the phone system only when you apply them. Work from top to bottom and keep **Getting started** open: it ticks each step by itself once the work exists. See Work through the getting-started checklist.

2. **Sign up and confirm your e-mail address**

   Open the sign-up page, fill in your company, work e-mail, country and plan, and choose **Sign up**. Confirm the e-mail within 24 hours, then set your name and a password of at least 12 characters. If your account was created for you, use the invitation e-mail instead. See Sign up for an account.

3. **Set up two-step verification**

   At the first sign-in the console shows **Set up two-step verification**. Choose **Start set-up**, add the key to an authenticator app, confirm with a code and store the recovery codes. Do this before anything else: everything after it is done under this login. See Set up two-step verification.

4. **Verify your company (KYB)**

   Open **KYB**. Enter your company details and directors, upload the documents (certificate of incorporation, proof of address, a director's ID) and choose **Submit for review**. When it is approved the page reads: Telephony is unlocked. Your provider now sets up your phone system; the phone pages show how far it has got. Until then calls cannot be placed or received, and the phone pages show the set-up steps and who does each.

5. **Put credit in the wallet**

   Open **Wallet**. **Available** is what you can spend. Set the **Low-balance threshold** to about one day's expected spend, so you are warned in time. Add credit with **Top up with crypto**, with **Pay by card** under **Top up by card** on **Billing** where it is offered, or by bank transfer as agreed with your provider. See Top up the wallet by card or with crypto.

6. **Choose a plan**

   Open **Billing**. Under **Choose a plan**, pick the **Plan** and the number of **Seats**, choose **Preview** to see what is charged now, then **Confirm**. The first period is taken from the wallet, so top up first. An account without a plan cannot buy numbers and may call only its sign-up country. For yearly billing and flex seats see Annual billing and flex seats.

7. **Add agents and their extensions**

   Open **Agents and extensions**. Under **Add an agent** enter **Name** and **E-mail address**, leave **Give the agent the next free extension** ticked for anyone who takes calls, and choose **Create agent**. Hand the temporary password over in person. See Add agents and give them extensions.

### 8 Get numbers

Open **Buy numbers**, filter by country and type, choose **Buy**, then **Confirm purchase**. To keep numbers you already have, use **Port your numbers**: start early, porting takes days. See Buy a number and route it to an agent or a queue and Port your numbers. If you bring your own supplier, add it on **Phone lines**: see Connect a phone supplier as a phone line.

### 9 Prove your caller IDs

Open **Caller IDs**. Under **Request a caller ID** enter each number you want to show and how it is proved. Under **Default caller ID for outgoing calls** choose Withheld or a verified number and choose **Save default**. A number that is not verified is refused when you apply. See Caller IDs and how a number is verified.

### 10 Create call queues

On **Agents and extensions**, in **Call queues**, choose **Add a queue**. Set the **Queue name**, **Queue number**, **Ring strategy** and **Members**, and what happens when nobody answers. Choose **Save queue**. See Create queues for calls and messages.

### 11 Route the numbers and apply

On **My numbers**, set each number's **Inbound destination** to an agent extension or a queue and choose **Save destination**. Then, on **Agents and extensions**, under **Apply to phone system**, choose **Check what will change**, read the list and choose **Apply now**. When it is done, the check says nothing is left to apply.

### 12 Create a queue for conversations

Chats, WhatsApp, e-mail and SMS wait in a conversation queue. On **Getting started**, under **Create a queue**, name it and choose **Create queue**. Sticky routing for each queue is on **Desk settings**.

### 13 Build and publish a flow

A flow decides what happens to a call or message before it reaches a queue: opening hours, a menu, a message. Open **Flows**, start from a template or **New flow**, choose **Create and open**, build it, choose **Save draft** and then **Publish**. See Build call and message flows and Typed prompts.

### 14 Connect your channels

Web chat: on **Getting started**, enter your website address, choose **Create the web chat** and paste the snippet on every page. E-mail and WhatsApp: open **Channels**; for WhatsApp use **Connect a number** with your own Meta account. See Set up e-mail and web chat, Connect WhatsApp with your own Meta account and SMS.

### 15 Set roles, security and feature access

Open **Security** and tick **Every user must use two-step verification**, then **Save policy**. On **Roles**, under **Make a role**, give supervisors and agents exactly the capabilities they need. On **Feature access**, the **Teams and account** and **People** views switch each feature on or off for the account, a team or a person; a change that costs money is quoted before you confirm. See Roles, network limits and API tokens.

### 16 Make a test call

Choose **Open the phone** on **Getting started** and allow the microphone. Wait for **Registered**. Call your own mobile and check the number it shows, then call your number from the mobile and answer it. Check you hear each other both ways. Choose **I have made a test call**. Then open **Usage**: both calls appear with a charge. See Make and take calls in the browser.

17 **Test each channel**

Send a message to each channel you connected (a chat from your website, a WhatsApp message, an e-mail) and check that it reaches the **Workspace** of an agent who is **Ready**, and that the reply arrives. Use **Getting started** to see which steps are still open.

18 **Train your team**

Give agents the Agent guide and the Agent quick reference. Give supervisors the Supervisor guide. For a day-by-day plan of your first week, follow Your first week.

19 **Add optional features when you need them**

Each one is switched on per account, team or person on **Feature access**: the dialler, speed to lead, the AI agent, call transcripts and live transcripts, card payments on calls and payment links, CRM and the CRM phone, webhooks and the API, wallboards, live alerts, goals and contests, meeting booking and the mobile app.

## Good to know

- Telephony stays locked until KYB is approved. Approval does not build the phone system by itself: your provider sets it up, and the phone pages show how far it has got. Agents, queues and caller IDs can be prepared meanwhile.
- Nothing reaches the phone system until you apply it. If the apply step says the phone server is not connected, the change is stored and sent when it reconnects.
- Everything is prepaid. At a balance of zero, new calls and messages are refused until you top up; calls already in progress end normally. A plan or seat fee the balance cannot pay suspends the service until a top-up.
- Until you choose a plan, calls reach only numbers in the country you signed up in, never premium-rate numbers, and the account cannot buy numbers.
- Invitations sent with **Invite** on **Getting started** create agents. Your provider sets up the logins of further administrators and supervisors if you need them.
- Audio goes directly between the browser and the phone system over UDP ports 10000 to 20000. If a test call connects with no audio or one-way audio, ask your IT team to allow outbound UDP on those ports and test without a VPN.
- This platform is not for emergency calls. Do not rely on it to reach emergency services.
- You decide whether calls are recorded and what callers are told. Set the retention period and check the data region before the first recording: see Data protection and retention.

## Related guides

- **Work through the getting-started checklist**: https://ringura.com/help/onboarding-checklist/
- **Your first week**: https://ringura.com/help/first-week/
- **Welcome: your first week as a new client**: https://ringura.com/help/welcome-new-client/
- **Set up two-step verification**: https://ringura.com/help/two-step-verification/
- **Add agents and give them extensions**: https://ringura.com/help/add-agents/
- **Buy a number and route it to an agent or a queue**: https://ringura.com/help/buy-numbers/
- **Caller IDs and how a number is verified**: https://ringura.com/help/caller-ids/
- **Create queues for calls and messages**: https://ringura.com/help/call-queues/
- **Top up the wallet by card or with crypto**: https://ringura.com/help/top-up-wallet/

- **Roles, network limits and API tokens**: https://ringura.com/help/security-roles/
- **Build a flow or phone menu (IVR)**: https://ringura.com/help/flow-builder/
- **Agent guide**: https://ringura.com/help/agent-guide/
- **Supervisor guide**: https://ringura.com/help/supervisor-guide/