RINGURA TRAINING

Your first week

A day-by-day programme to set up and learn a Ringura desk on your own: what to do each day, the guides to follow and how to tell the day is done.

For: Administrators and team leads · Last checked 29 October 2026 · Online, always current: https://ringura.com/help/first-week/ · Printed 29 October 2026

Steps

1. **Before you start**

   Gather: your company's legal name, registration number, VAT number and address; the certificate of incorporation, proof of address and a director's ID (PDF, JPEG or PNG); each agent's name and work e-mail; the countries you will call and the numbers you need; your website address; and, for WhatsApp, your Meta business account. Install an authenticator app on your phone and have a headset ready. Done when: you have all of it in one place.

2. **Day 1: account, login and verification**

   Tasks: sign up and confirm your e-mail (Sign up for an account); set up two-step verification (guide); open **KYB**, fill in the company and directors, upload the documents and choose **Submit for review**; open **Security** and tick **Every user must use two-step verification**. Done when: you can sign in with a code and the KYB application is submitted.

3. **Day 2: money and team**

   Tasks: open **Wallet**, set the **Low-balance threshold** and add credit (Top up the wallet); on **Billing** choose a plan with **Preview** and **Confirm**; on **Agents and extensions** create each agent with **Create agent** and hand over the temporary passwords (Add agents). Done when: **Available** shows your credit, **Your plan** shows the plan, and every agent is listed with an extension.

4. **Day 3: numbers, caller IDs and queues**

   Do this once KYB is approved and the page reads that telephony is unlocked. Tasks: buy numbers on **Buy numbers** or start a port on **Port your numbers**; request caller IDs on **Caller IDs**; on **Agents and extensions** choose **Add a queue** for each call queue; on **My numbers** set each number's destination; then **Check what will change** and **Apply now**. Guides: Buy numbers, Caller IDs, Call queues. Done when: the check says nothing is left to apply.

5. **Day 4: channels, flows and the first calls**

   Tasks: on **Getting started** choose **Create queue** for conversations and **Create the web chat**, and paste the snippet on your site; connect e-mail and WhatsApp on **Channels** (e-mail and web chat, WhatsApp); build and publish a flow on **Flows** (flows); choose **Open the phone**, wait for **Registered** and make a test call each way. Choose **I have made a test call**. Done when: a call in, a call out and a message on each channel reach an agent, and the replies arrive.

6. **Day 5: roles, supervision and training**

   Tasks: on **Roles** and **Feature access**, give each team only what it needs (Roles); open **Supervisor**, **Chat supervision** and **Wallboard** and try them with a colleague (Supervisor guide); create a scorecard on **Quality** (QA scorecards); set an **Alerts** rule for queue waiting; take your agents through the Agent guide and print the Agent quick reference. Done when: each agent has set themselves **Ready**, accepted a test conversation and resolved it.

7 At the end of the week

Check: **Getting started** ends with **Your desk is ready.**; **Usage** shows each test call with its charge and the **Ledger** on **Wallet** matches it; **Reports** shows the week's figures; the status page is bookmarked. Then plan the next features: the dialler, transcripts, card payments on calls, CRM and the others listed in the Administrator guide.

Good to know

- KYB review can take more than a day. Day 3 waits for it; do Day 4's web chat, e-mail and flows meanwhile, since they do not need telephony.
- Porting numbers and WhatsApp approval by Meta both take days. Start them as early as you can and use a bought number in the meantime.
- If an agent's phone does not reach **Registered**, the phone system may not be live yet, or the network may block it. Test on a mobile hotspot and see Make and take calls in the browser.
- A step on **Getting started** turns done by itself once the work exists, so you can do the days in a different order where nothing depends on it.
- Calls and messages are prepaid. Keep enough credit for the test calls and the first live day: at zero, new calls and messages are refused.

Related guides

- **Administrator guide**: https://ringura.com/help/administrator-guide/
- **Welcome: your first week as a new client**: https://ringura.com/help/welcome-new-client/
- **Work through the getting-started checklist**: https://ringura.com/help/onboarding-checklist/
- **Agent guide**: https://ringura.com/help/agent-guide/
- **Supervisor guide**: https://ringura.com/help/supervisor-guide/
- **Agent quick reference**: https://ringura.com/help/agent-quick-reference/