Ringo Retail

HELP GUIDE

Help Guide

Answers to common questions and a step-by-step guide to every screen in Ringo Retail. 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 what you sell, your prices and policies, hours, address, whether Ringo can hold items, and the number Ringo should transfer to. It takes about 10 minutes. Then connect your POS (Square, Shopify) or import your products (Inventory, Import CSV). Ringo Retail 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 store 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, what you sell, prices, policies, hours and when to transfer, then Save. Ringo uses the new details on the next call.

What are my hours used for?

Ringo tells callers when you are open and when a hold can be picked up. Type them like 10am-6pm, or closed. Pick your time zone under the hours.

02 Phone app & alerts

Common questions

How do I put Ringo on my phone?
It is free. iPhone or iPad: open app.ringoretail.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 holds, time-off requests and anything that needs you.

How does my staff get shift alerts?
Add each team member as a user, then have them sign in on their own phone, add Ringo Retail to the home screen and tap Turn on. When you add or change a shift, the person named on the shift gets an alert. Type their name on the shift the same as on their login.

Does my staff need a new phone number?
No. Alerts go to the app on their own phone, so nobody needs a new number.

Alerts are not showing up
Check that notifications are allowed for Ringo Retail in the phone Settings, that Focus or Do Not Disturb is not hiding them, and on iPhone that it was opened from the home screen (iOS 16.4 or newer). Then tap Turn on again. Email alerts keep coming either way.

03 Calls, stock and holds

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 answer stock questions?
Ringo looks the item up in your product list (Inventory) and says whether it is in stock and the price. In Settings, Ringo you choose whether it gives exact counts or just "in stock / only a few left", or turn stock answers off.

How do holds work?
If holds are on, Ringo can put an in-stock item on hold for a caller, a texter or a website chat visitor. It shows in Inventory, Holds & special orders, and the customer gets a confirmation text. Mark it Ready and they get a "ready for pickup" text; the day before the hold runs out they get a reminder (Back Office and up). They can reply Y to keep it longer or N to release it.

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, checks stock and can hold an item. You can turn this off in Settings, Alerts.

04 Texts

Common questions

Where do I see texts with customers?
Open Texts in the menu. Every text Ringo sent and every reply is there, grouped by customer. Texts that were not sent (no consent, not registered yet, or the customer replied STOP) show in red with the reason. You can type a reply to send from your store's number.

Why does my store need its own texting number?
Phone carriers only deliver business texts from numbers registered to that business (10DLC). In Settings, Texting registration, enter your legal business name, EIN, address and a contact, then Submit. Ringo buys a local number for your store and registers it with the carriers through Twilio. It usually takes 1 to 3 weeks; customer texts start the moment it is approved, and calls work the whole time. Until then customer texts are skipped and listed as not sent. Sole proprietors without an EIN: email support@ringoretail.com.

Who can Ringo text?
Only customers who agreed. Texts about their own holds, orders, repairs and back-in-stock alerts need a yes to "Can we text you updates?" (Ringo asks on calls; the website hold form has an unchecked box; your hold, repair and customer forms have a "Customer agreed to texts" box; or import a CSV with a consent column). Marketing texts (birthday, win-back, blasts, loyalty rewards, review requests) need a separate marketing yes. The customer record shows the consent status, and every yes is saved with the time, source and wording.

What do STOP and HELP do?
STOP (or UNSUBSCRIBE, CANCEL, END, QUIT) turns off ALL texts from your store to that customer, updates and marketing. START turns updates back on. HELP or INFO replies with your store name, your phone number and how to opt out.

What is the missed-call text-back and is it allowed?
Off by default. If you turn it on (Settings, Alerts), a caller who hangs up before Ringo can help gets one text from your store referencing the call they just made. It is a single, transactional reply to a call the customer started, with no marketing and an opt-out, which is the basis we rely on. Leave it off if you are unsure; it never sends to anyone who replied STOP.

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.

05 Inbox (Back Office and Full Growth)

Common questions

What does email sorting do?
Connect Gmail or Outlook in Settings, Connections. Mae sorts new email into Customers, Bills, Junk and Other, drafts replies to customers for you to check, and lists everything in Inbox, Email.

How do QuickBooks bills show up?
Connect QuickBooks in Settings, Connections. Unpaid vendor bills appear in Money as expenses each morning and are marked paid once QuickBooks shows them paid. Customers Ringo holds items for are added to QuickBooks too.

What is win-back outreach?
Inbox, Outreach: Ringo texts customers on your Customers list who haven't been in for a few months (you pick how many) and invites them back. Replies show on the Texts screen.

What is the payment link for?
Add your Square, Stripe or Shopify payment link in Inbox, Outreach. It is added to "ready for pickup" texts so customers can pay ahead for special orders.

06 Growth and marketing

Common questions

How do review requests work?
Inbox, Reviews: save your Google review link, then send requests by email or text. Turn on "ask after pickup" and Ringo asks automatically when a hold is marked picked up. Email requests get one reminder after 4 days if they don't click.

How do I add website chat?
Inbox, 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, checks stock, holds items and sends you the leads.

What is the Growth tab?
Growth plans a month of posts with captions in your voice, posts them to Facebook, Instagram, Google, YouTube and TikTok once you approve, drafts replies to comments and Google reviews, and keeps your photo and clip library (Full Growth or the Marketing Crew add-on).

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.

07 Connections

Common questions

How do I connect Square?

Settings, Connections, Square POS, Connect: sign in to Square and click Allow, and you come right back. If it says Coming soon, use the Advanced paste option: in Square: go to developer.squareup.com, sign in with your Square login, create an app (name it Ringo Retail), open Credentials, switch to Production and copy the Access token (it already includes inventory write access, which Ringo uses to send count changes back to Square). In Ringo: Settings, Connections, Square POS, Connect, and paste the token. Your products, prices, counts and the last 30 days of sales come in right away. For live updates, see How do live POS updates work.

How do I connect Shopify?

In Shopify admin: Settings, Apps and sales channels, Develop apps, Create an app (Ringo Retail). Under Admin API scopes tick read_products, read_inventory, write_inventory, read_orders and read_locations, then Install app and copy the Admin API access token (starts with shpat_) and the API secret key. In Ringo: Settings, Connections, Shopify, Connect, enter yourstore.myshopify.com and paste the token, then paste the API secret key when asked so live updates turn on.

How do I connect Outlook or Google Calendar?

Settings, Connections, then Connect next to Outlook or Google Calendar and sign in with that account. Pickups and appointments Ringo sets go on that calendar. You can disconnect anytime.

Why are texts not going out yet?

Texting turns on once your store's texting number is registered with the phone carriers (US rules for business texting). We set that up with you; it takes a few days to approve. Until then, alerts go by email and the Texts screen stays empty.

08 Store extras

Common questions

How do live POS updates work?
Connect Square or Shopify in Settings, Connections. Shopify: paste your app's API secret key and Ringo adds the webhooks itself. Square: in the Square Developer Dashboard open your app, Webhooks, Add subscription, paste the URL shown in Connections, pick inventory.count.updated, order.updated and payment.updated, save, then paste the Signature key into Connections. Counts and sales then update within seconds; everything also re-syncs nightly.

Can I connect Clover or Lightspeed Retail (X-Series)?
Yes. Settings, Connections, Connect. Clover: paste your merchant ID and an API token (Clover dashboard, Account & Setup, API Tokens, with Inventory read and write, and Orders read). Lightspeed Retail (X-Series): paste your store address (yourstore) and a personal token (Setup, Personal tokens). Lightspeed R-Series (the older Lightspeed Retail POS, web address ending in merchantos.com or lightspeedapp.com) isn't supported yet; use a CSV import until it is. Products, counts and sales sync nightly and when you click Sync POS now.

How do reorder suggestions work?
Inventory, Reorder looks at the last 30 days of sales for each item, how many you have available (on hand minus holds) and the vendor's lead time, and suggests how many to order to cover your reorder days (21 by default; change it in Settings, Store extras). Items at or below their reorder point always show. Pick items and click Draft PO to make a draft purchase order for that vendor.

How do I scan barcodes?
In Inventory click 📷 Scan (or Count stock), and in Vendors click Receive on a purchase order. Your phone or tablet camera reads the barcode; a USB or Bluetooth scanner works too: just scan into the box. Items match by barcode/UPC or SKU.

What does Count stock do?
Walk the shelves and scan or type each item's count. When you finish, on-hand counts are set to what you counted and every difference is logged in Store ops, Shrink (miscount or found), so you can see where stock went.

What are back-in-stock texts?
When a caller or texter asks for something that is sold out, Ringo offers to text them when it is back. They show in Inventory, Back-in-stock list. The moment the count goes above zero (POS update, received PO, count or edit) each person gets one text, and can reply HOLD to have one set aside.

How do loyalty points work?
Turn on loyalty in Settings, Store extras and choose points per dollar and the reward. Sales with a customer phone (logged in Sales or from Shopify orders) add points to that customer. Customers can text POINTS to see their balance and get a text when they earn a reward. Birthday texts go out on the customer's birthday if you turn them on. Anyone who replies STOP gets no more texts.

How do I add the "Hold this for me" button to my website?
Settings, Store extras: turn on online holds and copy the one line of code into your website. Shoppers search what is in stock and put an item on hold; they get a confirmation text (and email if they give one) and the hold shows in Inventory.

I have more than one store. Can I track each?
Yes. List your locations in Settings, Store extras. Products then keep a count per location (the total is the sum), Inventory has a location picker, and sales, holds and shifts can be tagged with a location. Square, Shopify and Lightspeed locations with the same names are matched automatically.

How does the timeclock work?
Everyone clocks in and out from the button on the Dashboard (works on a phone). Managers see hours worked against scheduled shifts and weekly labor cost vs sales in Schedule, Timeclock. Set each person's hourly rate in Settings, Users.

What is the end-of-day report?
Turn it on in Settings, Store extras. After closing time each day, Ringo texts and/or emails you sales today, top sellers, holds waiting for pickup or expiring, how many items need reordering and hours clocked.

09 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 Retail 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 Retail).

10 Account and billing

Common questions

How do I add someone from my store?
Settings, Users: invite them by email and pick a role. Admins can change settings; managers see sales, expenses and reports; employees see products, holds and the schedule.

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, holds, sales logged, texts, reviews and promotions. 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@ringoretail.com or call (720) 901-1461 (Denver) or (817) 533-6517 (Fort Worth).

11 Screen by screen

Every page of the app, step by step

Dashboard

Your store at a glance: sales, top sellers, low stock, approvals, who is working and calls Ringo answered.

1. Read the number tiles across the top. Click any tile to jump to the list behind it.
2. Check “Needs attention” for low stock, time-off requests, unpaid bills, holds due today and short-staffed days.
3. Type a question in the Ask the Crew box and press Ask (Back Office and up).
4. If the timeclock is on, use Clock in / Clock out on the dashboard card.
5. Scroll down to “Recent calls Ringo answered” and click a call to read the summary and play the recording.

> **Tips:** Turn panels on or off in Settings → Make it yours → Dashboard panels. The 🔔 bell shows alerts; every alert is also kept in Notifications.

If something's wrong

- **A tile shows 0 or is missing:** Sales and expenses only show for managers on Back Office and up, and when the panel is turned on in Make it yours.
- **No calls listed:** Calls appear after Ringo answers the first one; during setup that is after your test calls.

EVERYONE ON THE ACCOUNT

Ask the Crew

Ask plain-English questions about stock, prices, sales, schedule and expenses, or ask for a fix or a promo.

1. Type your question in the box at the bottom.
2. Press Send or Enter.
3. Or tap one of the suggestion buttons under the box.
4. Ask a follow-up; the Crew remembers the last few messages in this conversation.

> **Tips:** Matching products show with price and on-hand count under the answer. Employees never see costs or margins in answers.

If something's wrong

- **“I couldn’t find that”:** Use the product name or SKU as it appears in Inventory, or import your items first.
- **Answer is out of date:** Run “Sync POS now” on Inventory → Products so counts are current.

EVERYONE ON THE ACCOUNT · BACK OFFICE PLAN AND UP

Inventory · Products

Every item you sell: SKU, price, cost, on-hand count and reorder point. Ringo uses it to answer “do you have…?” calls.

1. Search by name, SKU, category, vendor or barcode in the search box.
2. Click “+ Add product” to add one item (managers and admins).
3. Click “⬆ Import CSV” to load your whole item list from your POS export.
4. Connected to Square, Shopify, Clover or Lightspeed Retail (X-Series)? Click “🔄 Sync POS now” to pull the latest counts.
5. Use “📷 Scan” to look up an item by barcode and fix its count.
6. Use “📋 Count stock” to count a shelf; differences go to the Shrink log.
7. Click any row to edit it. Rows shaded orange are at or below their reorder point.

> **Tips:** Use the same SKU as your POS so imports and sales match. With more than one location, pick a store in the location menu to see its counts. “⬇ Download CSV” exports the list as shown.

If something's wrong

- **Counts look wrong:** Run Sync POS now, or re-import your POS list. Matching SKUs are updated to the POS count.
- **Ringo says an item isn’t found:** Check the product name and SKU here and that it has been imported.
- **I can’t edit products:** Only managers and admins can change products; employees can look up and count.

EVERYONE ON THE ACCOUNT

Inventory · Holds & special orders

Items set aside for a customer or ordered in for them, including the holds Ringo takes on calls.

1. Click “+ Add hold / special order” and fill in the customer, phone, item and due date.
2. Set the status as it moves along; marking it ready texts the customer a “ready for pickup” message when that text is on.
3. Search by customer, phone, item or status.
4. Holds due today or past due show in “Needs attention” on the Dashboard.

> **Tips:** Ringo sends a reminder the day before a hold runs out (Back Office and up), and the customer can reply Y to keep it or N to release it. Set how many days Ringo may hold an item in Settings → Ringo.

If something's wrong

- **Ringo isn’t placing holds:** Tick “Ringo can put items on hold” in Settings → Ringo.
- **Customer didn’t get a text:** Check Settings → Alerts → Texts Ringo sends to your customers, and that the phone number is a cell.

EVERYONE ON THE ACCOUNT

Inventory · Back-in-stock list

Customers waiting for a sold-out item. Each gets one text the moment the count goes above zero.

1. Click “+ Add to back-in-stock list” and enter the item or SKU, name and phone.
2. Ringo adds people here by itself when a caller or texter asks about a sold-out item.
3. When stock arrives (receive a PO, sync, or edit the count) each waiting customer is texted once and marked notified.
4. Customers can reply HOLD to that text to have it set aside.

If something's wrong

- **Nobody was texted after restocking:** The SKU must match the product, and the count must go from 0 to above 0.

EVERYONE ON THE ACCOUNT

Inventory · Reorder

Suggested order quantities from the last 30 days of sales, open holds and vendor lead time, grouped by vendor.

1. Review each vendor group and the suggested quantity per item.
2. Click “Draft PO” under a vendor to turn the suggestions into a purchase order.
3. Open Vendors → Purchase orders to edit, send and receive it.

> **Tips:** Change how many days of sales a suggestion covers in Settings → Store extras → Reorder & back-in-stock. Set Reorder at on each product so low items show.

If something's wrong

- **Nothing suggested:** Suggestions need sales history and a vendor on each product.

MANAGERS AND ADMINS

Inventory · Price changes

A log of every price change made in the app: old price, new price, who and when.

1. Search by SKU, item or the person who changed it.
2. Change a price by editing the product on the Products tab; it is logged here automatically.

MANAGERS AND ADMINS

Inventory · Pricing & labels

Bulk view of prices with filters for low stock and slow sellers, plus shelf labels.

1. Pick All, Low stock or Slow sellers to filter the list.
2. Tick the items you want labels for.
3. Click “🏷 Print labels for checked”.
4. Click “🕘 Price history” to see past changes.

MANAGERS AND ADMINS

Inventory · Stock transfers

Move stock between your locations with a record of every move.

1. Click “+ New stock transfer” and choose From and To locations and the items.
2. Send it: the units come out of the From location.
3. Receive it at the other store: the units are added to the To location.
4. Every move shows in the Stock ledger.

If something's wrong

- **No locations to pick:** Add your stores in Settings → Store extras → Locations.

MANAGERS AND ADMINS

Inventory · Variants

Items that come in sizes or colors, grouped under a parent SKU.

1. Each product with “Variant of (parent SKU)” set shows under its parent here.
2. To add a variant, add a product on the Products tab and fill in Variant of, Size and Color.
3. Check totals per parent to see which sizes or colors are running out.

EVERYONE ON THE ACCOUNT

Inventory · Stock ledger

Every change to a count: sales, receiving, returns, shrink, counts, transfers and POS syncs.

1. Type a SKU and click Show, or click “All items”.
2. Read the reason, who and when for each change.
3. From the Products tab, the 📒 button on a row opens that item’s ledger.

MANAGERS AND ADMINS

Sales

Log or import sales. Each sale lowers stock for its SKU and feeds top sellers and Insights.

1. Click “+ Log a sale” to enter one by hand.
2. Click “⬆ Import CSV” to load a sales export from your POS.
3. Search by SKU, item or employee.
4. Click a row to fix a mistake.

> **Tips:** With Square, Shopify, Clover or Lightspeed Retail (X-Series) connected, sales arrive by themselves.

If something's wrong

- **Stock didn’t go down:** The sale’s SKU must match a product SKU.

MANAGERS SEE THE LIST; EMPLOYEES CAN LOG SALES · BACK OFFICE PLAN AND UP

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MANAGERS SEE THE LIST; EMPLOYEES CAN LOG SALES · BACK OFFICE PLAN AND UP

Money

Expenses and bills by category, paid or unpaid.

1. Click “+ Add expense or bill”.
2. Fill in the category, vendor, amount and due date. Set Paid to yes when paid.
3. Click “Mark paid” on an unpaid row.
4. Bills over your auto-approve amount wait in Approvals.

> **Tips:** Connect QuickBooks in Settings → Connections and bills sync from there.

MANAGERS AND ADMINS · BACK OFFICE PLAN AND UP

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MANAGERS AND ADMINS · BACK OFFICE PLAN AND UP

Schedule · Shifts

The weekly shift grid. Build the week, publish it, and let the team offer and swap shifts.

1. Click “+ Add shift”, or click an empty cell in the grid.
2. Click “Copy last week” to start from last week’s shifts.
3. Click “✨ Auto-fill gaps” to fill open time from staff availability and max hours.
4. Click a shift to Edit, “📣 Offer to the team” or “🔁 Ask to swap”.
5. Click “📣 Publish schedule” so staff get it by text or email.
6. Tick “My shifts” to see only yours.

> **Tips:** Keyboard: Tab or arrows to move, Enter to add or open, Delete to remove. Short-staffed days and over-hours warnings use Team rules.

If something's wrong

- **Auto-fill skipped someone:** Add their availability and max hours on the Staff tab.
- **Staff didn’t get the schedule:** Add a phone or email for them on the Staff tab, then publish again.

EVERYONE SEES IT; MANAGERS EDIT · BACK OFFICE PLAN AND UP

Schedule · Time-off requests

Employees ask for time off; managers approve or deny.

1. Click “+ Request time off” and pick the dates and reason.
2. Managers approve or deny here or in Approvals.
3. Pending requests also show on the Dashboard.

EVERYONE ON THE ACCOUNT

Schedule · Timeclock

Clock in and out, see punches, and compare hours worked with the schedule and labor cost with sales.

1. Use Clock in / Clock out on the card at the top.
2. Managers: step through weeks in the Labor box to see worked vs scheduled hours and cost.
3. Click a punch to fix it (managers).

> **Tips:** Set hourly rates in Settings → Users so labor cost is right. Turn the timeclock on in Settings → Store extras.

If something's wrong

- **Can’t clock in:** The geofence in Team rules may require you to be near the store.

EVERYONE ON THE ACCOUNT

Schedule · Shift swaps

Requests to hand a shift to someone else.

1. On the Shifts tab, tap one of your shifts and choose “🔁 Ask to swap”, or click “+ Ask to swap a shift” here.
2. Pick who to give it to, or leave it blank for anyone.
3. A manager approves the swap in Approvals.

EVERYONE ON THE ACCOUNT

Schedule · Staff

Your team roster for scheduling: role, max hours, availability, phone and email.

1. Click “+ Add team member”.
2. Set max hours (drives over-hours warnings and auto-fill) and availability.
3. Add phone and email so they get the published schedule.
4. Mark Under 18 so minor-hour rules apply.

MANAGERS AND ADMINS

Schedule · My schedule

Your own shifts for the next week, your availability, time off and clock-in PIN.

1. See your upcoming shifts and hours.
2. Set “When I can work” and click Save availability.
3. Ask for time off and click Send request.
4. Set a Clock-in PIN for the kiosk and click Save PIN.
5. Take open shifts the team has been offered.

EVERYONE ON THE ACCOUNT

Schedule · Timesheets

Review and approve hours for each pay period, then export or send them to payroll.

1. Click Current to jump to this pay period.
2. Click a row to edit a punch; “+ Add punch” for a missed one.
3. Click “✅ Approve all” when the hours look right.
4. Click “🔒 Lock period” so nobody can change them.
5. Export with “⬇ Download CSV”, or send to Gusto or QuickBooks.

> **Tips:** Overtime rules come from Team rules.

If something's wrong

- **Hours missing:** Add the punch with “+ Add punch” and a reason; it is kept in the audit log.
- **Can’t edit:** The period is locked; a manager can unlock it.

MANAGERS APPROVE; EMPLOYEES SEE THEIR OWN

Schedule · Templates & repeats

Save a week as a template and create repeating shifts.

1. Under “Save a week as a template”, name it and save the current week.
2. Apply a template to a new week.
3. Use “🔁 Repeating shift” to pick people, days and times, then click Create shifts.

MANAGERS AND ADMINS

Vendors

Vendor contacts, lead times and terms.

1. Click “+ Add vendor”.
2. Fill in contact, email and lead time (used by Reorder).
3. Click a row to edit.

MANAGERS AND ADMINS · BACK OFFICE PLAN AND UP

Vendors · Purchase orders

Orders to vendors. Receive them and stock goes up automatically.

1. Click “+ New purchase order”, or make one from Inventory → Reorder.
2. On a draft, use “🧮 Lines & costs” for items, freight and duty, then “📧 Send to vendor”.
3. When the delivery arrives, click Receive and scan or type what came in.
4. If anything was short, click “📨 Claim short items” to email the vendor.

> **Tips:** Large POs may need approval first.

If something's wrong

- **Stock didn’t go up:** Item SKUs on the PO must match your products.

MANAGERS AND ADMINS · BACK OFFICE PLAN AND UP

Customers & loyalty

Your customer list with loyalty points, visits and store credit.

1. Click “+ Add customer” or “⬆ Import CSV”.
2. Click 📜 History on a row for purchases, orders, repairs, gift cards and store credit.
3. Tags show VIP, Birthday (this month), Lapsed and Credit.
4. Add or use store credit from History.

> **Tips:** Loyalty points, rewards and birthday texts are set in Settings → Store extras. Customers text POINTS to get their balance.

EVERYONE ON THE ACCOUNT · BACK OFFICE PLAN AND UP

Customers · Gift cards

Issue, load and redeem gift cards.

1. Click “+ Issue gift card”; leave the code blank to make one.
2. Click Redeem on a card to take money off it.
3. Managers can click Load to add value.
4. Open the row to see its history.

EVERYONE ON THE ACCOUNT

Customers · Redeem gift card

Quick counter screen to check and redeem a gift card.

1. Type or scan the card code.
2. Click Check balance.
3. Enter the amount and click Redeem.

EVERYONE ON THE ACCOUNT

Store ops · Today

Today’s opening and closing checklists and the drawer count in one place.

1. Click Start on the 🌅 Opening checklist and tick each item.
2. At close, do the 🌙 Closing checklist.
3. Use “💵 Count the drawer” and save the count.

> **Tips:** Edit the checklist items in Settings → Make it yours. Set owners and deadlines in Team rules.

EVERYONE ON THE ACCOUNT

Store ops · Returns & exchanges

Log refunds, store credit and exchanges. “Back to stock: yes” adds the item back to inventory.

1. Click “+ Log a return”.
2. Enter SKU, qty, refund and type (refund, store credit or exchange).
3. For store credit, add the customer phone so the credit lands on their account.
4. Set Back to stock to yes or no.

EMPLOYEES LOG; MANAGERS SEE THE LIST

Store ops · Shrink

Stock lost to damage, theft, expiry or miscounts.

1. Click “+ Log shrink”.
2. Pick the reason and quantity; the count goes down.
3. Count-stock differences land here too.

EVERYONE ON THE ACCOUNT

Store ops · Cash drawer counts

Count the drawer and see over/short against what was expected.

1. Click “+ Count the drawer”.
2. Enter Expected and Counted; over/short is worked out.
3. Big differences show on the Dashboard.

EVERYONE ON THE ACCOUNT

Store ops · Opening & closing checklists

A record of every completed checklist.

1. Click “+ Do a checklist”, or use the Today tab.
2. Note any issues in the Issues box.

EVERYONE ON THE ACCOUNT

Store ops · Training notes

How-to notes for your team. Ask the Crew reads them too.

1. Click “+ Add training note”.
2. Write the title and steps.
3. Employees can search and read them.

EVERYONE ON THE ACCOUNT

Store ops · Bank deposits

Cash taken out of the drawer for the bank.

1. Click “+ Log a bank deposit”.
2. Enter the amount, who and which location.
3. Deposits lower the cash expected on the Z report.

MANAGERS AND ADMINS

Store ops · Paid-outs

Cash paid out of the drawer for supplies or a delivery tip.

1. Click “+ Log a paid-out”.
2. Enter amount and reason.
3. Paid-outs lower the cash expected on the Z report.

EMPLOYEES LOG; MANAGERS SEE THE LIST

Promotions

Sales and discounts. Approve, post and compare results.

1. Click “+ Create promotion”.
2. Approve it here or in Approvals.
3. Use “✍️ Social post” to write a post, or Google post to queue one for your Google profile.
4. Click Results to compare sales during the promo with before.

MANAGERS AND ADMINS · BACK OFFICE OR MARKETING ADD-ON

Promotions · Text & email blasts

Send a text or email to a customer segment.

1. Click “+ New text / email blast”.
2. Pick a segment: VIP, Lapsed, Birthday, Loyalty or all.
3. Nothing sends until it is approved.

> **Tips:** Texts skip anyone who replied STOP.

MANAGERS AND ADMINS

Repairs & service

Book and track repairs and service jobs.

1. Click “+ Book a repair / service”.
2. Set the status as you work; marking Ready texts the customer.
3. Record payments on the job.

> **Tips:** Turn on “Ringo books repairs” in Settings → Make it yours.

EVERYONE ON THE ACCOUNT

Repairs · Open drop-off times

The times Ringo can offer callers for drop-offs.

1. Set which days and times you take drop-offs.
2. Save. Ringo only offers these times.

EVERYONE ON THE ACCOUNT

Tasks · All tasks

Every task with assignee, due date and status.

1. Click “+ New task”.
2. Assign a person or role, set due date and repeat.
3. Overdue tasks alert the assignee and managers.

EVERYONE ON THE ACCOUNT

Tasks · My tasks

Tasks assigned to you or your role.

1. Tick a task to complete it.
2. Add a photo when one is needed (📷).
3. Use 💬 to comment.

EVERYONE ON THE ACCOUNT

Tasks · Board

A board of tasks by status for managers.

1. Click “+ New task”.
2. Move tasks along by changing status.
3. Click a task to edit or comment.

MANAGERS AND ADMINS

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 on the right side, theirs on the left.
3. Admins: type in “Type a reply…” and click Send.
4. Customer names come from Customers or Holds with the same phone.

> **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, or the number is a landline.

MANAGERS AND ADMINS (ADMINS CAN REPLY)

Inbox · Email sorting

Your connected mailbox sorted so you see what needs you first.

1. Connect Gmail or Outlook in Settings → Connections.
2. Emails are sorted into groups; click Open to read one in your mail app.
3. Handle the “needs you” group first.

If something's wrong

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

ADMINS ONLY · BACK OFFICE PLAN AND UP

Inbox · Win-back outreach

Automatic texts to customers who haven’t visited in a while.

1. Set “Text customers this many months after their last visit”.
2. Write your message; {name} and {business} fill in.
3. Click Save. Ringo texts each lapsed customer once.

> **Tips:** Customers need a phone and a last visit date.

ADMINS ONLY · BACK OFFICE PLAN AND UP

Inbox · Review requests

Ask happy customers for a Google review.

1. Paste your Google review link and click Save.
2. Enter the customer name and their email or cell.
3. Click "⭐ Send review request".

> **Tips:** On Full Growth, requests go out after pickups automatically.

ADMINS ONLY · BACK OFFICE PLAN AND UP

Inbox · Website chat

A Ringo chat bubble for your website that checks stock and holds items, plus the chats it had.

1. Under "Add the chat bubble to your website", copy the code.
2. Paste it into your website's footer or custom code box.
3. Read past conversations under Website chats.

ADMINS ONLY · FULL GROWTH

Approvals

Bills, purchase orders, promotions, blasts, time off, shift swaps and posts waiting for a yes.

1. Read each item's title and details.
2. Click Approve or Deny.
3. Admins: set "Auto-approve bills under $" and click Save rule.

> **Tips:** Nothing is paid, ordered, sent or posted until you approve it. The Dashboard tile shows how many are waiting.

If something's wrong

- **Approvals is missing from the menu:** It may be turned off in Settings → Make it yours, or your plan is Front Desk.

MANAGERS AND ADMINS · BACK OFFICE PLAN AND UP

Insights · Overview

Sales, transactions, top and bottom sellers for any date range, compared with an earlier period.

1. Pick a Date range (Today, Week to date, Last 30 days, Custom...).
2. Pick what to Compare to and a Location if you have several.
3. Click Show.
4. Read Top sellers and Bottom sellers to plan stock and promos.

If something's wrong

- **Numbers look low:** Sales only count once imported or synced from your POS.

MANAGERS AND ADMINS · BACK OFFICE PLAN AND UP

Insights · Register (Z) report

End-of-day register report by location: sales, tenders, tax, discounts, tips and expected cash in the drawer.

1. Pick the day and location.
2. Click Show.
3. Set “Starting cash each day” and click Save so expected cash is right.
4. Click 🖨 Print to keep a paper copy.

> **Tips:** Deposits and paid-outs from Store ops lower the expected cash.

MANAGERS AND ADMINS · BACK OFFICE PLAN AND UP

Insights · Sales tax

Sales tax collected for a date range, grouped by day, month or the whole range.

1. Pick the Date range.
2. Pick Group by: Day, Month or Whole range.
3. Click Show.
4. Click ⬇ CSV to download for your accountant.

MANAGERS AND ADMINS · BACK OFFICE PLAN AND UP

Insights · Profit & loss

Sales minus cost of goods and expenses for the last 12 months.

1. Read each month: sales, cost of goods, expenses and profit.
2. Add a Cost on each product so cost of goods is right.
3. Log or sync expenses in Money.

If something's wrong

- **Profit looks too high:** Products without a Cost count as zero cost.

MANAGERS AND ADMINS · BACK OFFICE PLAN AND UP

Insights · Inventory value & dead stock

What your stock is worth at cost and which items haven't sold in 60+ days.

1. Review total stock value at cost.
2. Scroll to "Dead stock (no sale in 60+ days)".
3. Mark down or promote dead stock from Promotions.

MANAGERS AND ADMINS · BACK OFFICE PLAN AND UP

API & webhooks

API keys and webhooks to connect Ringo Retail with Zapier, Make, n8n or your own tools, plus POS write-back.

1. Type a name, pick Access, and click Create key. Copy the key now; it is shown once.
2. Paste your https URL (Zapier "Catch Hook", Make or n8n) and click Add webhook.
3. Click Send test, then check the Delivery log.
4. Failed deliveries retry; click "Retry pending now" to try at once.

> **Tips:** Revoke a key you no longer use. Under "POS is the source of truth", choose whether counts changed in Ringo are sent back to your POS.

If something's wrong

- **Webhook shows failed:** The URL must be https and answer with a 2xx status.

ADMINS ONLY · BACK OFFICE PLAN AND UP

Audit log

Who changed what and when, across products, counts, prices, punches and settings.

1. Fill any filter: kind, user, action, dates or text.
2. Click Filter.
3. Click a row to see the before and after.
4. Click ⬇ CSV to download.

MANAGERS AND ADMINS · BACK OFFICE PLAN AND UP

Notifications

Every alert Ringo sent you, kept in one list.

1. Unread alerts are bold with a ●.
2. Click an alert to mark it read and open the page it is about.
3. Click Mark all read to clear the list.

> **Tips:** The 🔔 bell in the top bar shows the unread count. Turn on phone alerts with the Turn on / Install button when offered.

EVERYONE ON THE ACCOUNT

Team rules

Overtime, pay periods, schedule warnings, task alerts, checklist owners, geofence and payroll export.

1. Pick your Overtime rule (federal, California and others) and when a pay period starts.
2. Set schedule alerts and warnings, and how task alerts go out.
3. Under "✅ Checklist owners & deadlines", pick who owns opening and closing.
4. Optional: turn on the geofence and click "📍 Use my location" at the store.
5. Click Save team rules.

> **Tips:** "▶ Run alert checks now" sends any due alerts at once.

ADMINS ONLY · BACK OFFICE PLAN AND UP

Store setup

A step-by-step checklist to get your store fully running, with optional demo data.

1. Work down the numbered steps; each button takes you to the right screen.
2. Steps tick themselves ✅ when done.
3. Click “Load demo data” to try things with sample records.
4. Click “Clear demo data” to remove only the demo records.

ADMINS ONLY

Clock-in kiosk

A shared store tablet where staff clock in and out with a PIN.

1. A manager signs in on the store device and opens this page.
2. Staff type their PIN on the keypad.
3. Tap “Clock in / out”.
4. Use 🍽 Break and Back for breaks.

If something's wrong

- **“PIN not found”:** Set your PIN in Schedule → My schedule.

MANAGERS AND ADMINS SIGN THE DEVICE IN; EVERYONE USES IT

Print

Printable reports: inventory, reorder list, sales, top sellers, expenses, schedule, calls and settings.

1. Pick a report under “What to print”.
2. Set From (and To) and click Update.
3. Click 🖨 Print or save as PDF from the print dialog.

EVERYONE (REPORTS FOLLOW YOUR ACCESS)

Help

Search every page guide, ask a question, take the guided tour, or contact support.

1. Type in “Search the page guides”.
2. Click a result to open its guide, or Go to open that page.
3. Ask a question in the box at the top.
4. Click ▶ Take the guided tour.

EVERYONE ON THE ACCOUNT

Marketing · Promotions & texts

Your store promotions and text/email blasts, from the Marketing page.

1. Create a promotion with the offer and dates.
2. Use Social post or Google post to promote it.
3. Send a text or email blast to a segment; it waits for approval.

ADMINS ONLY · MARKETING CREW ADD-ON OR FULL GROWTH

Marketing · Content calendar

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

1. Connect Facebook/Instagram and Google in Settings → Connections.
2. Click "✨ Plan the month", or "＋ One post".
3. Edit any post, then click ✅ Approve. Approved posts go out on their date.

If something's wrong

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

ADMINS ONLY · MARKETING CREW ADD-ON OR FULL GROWTH

Marketing · Photos & clips

Your photos and short clips for posts, videos and your logo.

1. Upload photos and clips.
2. Click "Use as logo" on an image to set your logo.
3. Click "🎬 Make video from clips" to make a short video.

ADMINS ONLY · MARKETING CREW ADD-ON OR FULL GROWTH

Marketing · Comments

Comments on your Facebook and Instagram posts with drafted replies.

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

ADMINS ONLY · MARKETING CREW ADD-ON OR FULL GROWTH

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.

ADMINS ONLY · MARKETING CREW ADD-ON OR FULL GROWTH

Marketing · Email campaigns

Email promotions to your contacts.

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 for results; “🖨 Print results” prints them.

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

ADMINS ONLY · 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 and download the ad.

ADMINS ONLY · MARKETING CREW ADD-ON OR FULL GROWTH

Marketing · My website

A simple one-page website for your store with hours, reviews, call-back form and chat.

1. Fill in Headline, About you and What you carry, or click “✨ Write it for me”.
2. Upload your logo, pick a color, and choose what to show.
3. Check the preview (Full screen for a closer look).
4. Click “Publish my website”.

ADMINS ONLY · MARKETING CREW ADD-ON OR FULL GROWTH

Marketing · Contacts

Your email list.

1. Add someone with email, name, phone and tags.
2. Or Import a list (paste or upload) and tag everyone in it.
3. Click Remove to take someone off.

ADMINS ONLY · MARKETING CREW ADD-ON OR FULL GROWTH

Marketing · Website promo

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.

ADMINS ONLY · MARKETING CREW ADD-ON OR FULL GROWTH

Marketing · Sender details

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

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

ADMINS ONLY · MARKETING CREW ADD-ON OR FULL GROWTH

Settings · Setup form

About 10 minutes: what you sell, policies, hours, transfers, phone line and kickoff call. Your answers become Ringo's script.

1. Fill in "1. Your store" (fields marked * are required).
2. Set Hours and holds on the right.
3. Under "2. Phone line & systems", choose forwarding or a new number and your POS.
4. Under "3. Kickoff call", give your best number and times.
5. Tick the terms box and click "Send my setup form".

> **Tips:** You can update it until your kickoff call.

ADMINS ONLY

Settings · Ringo

How Ringo answers your phone: greeting, what you sell, policies, hours, stock answers, holds and 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 Retail.
2. Edit “Your store”: name, greeting, what you sell, policies and address.
3. Set Hours and what Ringo does after hours.
4. Choose how Ringo answers stock questions and how many days it can hold items.
5. Set when to transfer and the transfer number.
6. Click Save changes. “See Ringo’s instructions” shows exactly what Ringo is told.

If something's wrong

- **Ringo gives the wrong hours:** Fix Hours here and Save; the next call uses them.

ADMINS ONLY

Settings · Make it yours

Turn sections and dashboard panels on or off for everyone on your account, and set store rules.

1. Under “Sections you use”, untick anything you don’t need; it disappears from the menu.
2. Under “Dashboard panels”, pick what shows on the Dashboard.
3. Set rules, checklist items and brand color further down.
4. Click Save.

ADMINS ONLY

Settings · Store extras

Locations, reorder days, loyalty, online holds, timeclock, end-of-day report and POS sync.

1. Under 🏬 Locations, list your stores to track counts per location.
2. Set “Reorder suggestions cover this many days of sales”.
3. Set ⭐ Loyalty: points per $1, points for a reward, the reward and birthday offer.
4. Copy the “Hold this for me” code for your website.
5. Turn on ⏱ Timeclock and the 🧾 End-of-day report, then click Save.

ADMINS ONLY

Settings · Alerts

Who gets alerts, 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.
3. Set Quiet hours.
4. Choose which customer texts go out (hold confirmations, reminders, and the missed-call text-back, which is off by default).
5. Click Save alerts.

> **Tips:** Texts only go to customers who agreed to them, from your store’s registered number (Settings → Texting registration).

ADMINS ONLY

Settings · Connections

Connect your POS, calendars, QuickBooks, email and social accounts.

1. Find the app under Connected accounts.
2. Click Connect and sign in, or paste the token the instructions ask for. POS tokens need inventory WRITE access (Shopify: write_inventory and read_locations; Clover: Inventory read and write) so count changes go back to your POS.
3. Check it shows as connected; use Reconnect if it stops working.
4. On Inventory, click “🔄 Sync POS now” to pull products and sales.

> **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”. Square and Shopify update live once the signing key is pasted; Clover and Lightspeed Retail (X-Series) sync nightly. Lightspeed: only Lightspeed Retail (X-Series, the yourstore.retail.lightspeed.app kind) connects. Lightspeed R-Series isn’t supported yet; import a CSV export instead.

If something's wrong

- **Shows Upgrade instead of Connect:** That connection needs a higher plan or the Marketing add-on.
- **“Did not accept that token”:** The token is missing a permission: it needs read access to products, inventory and orders and write access to inventory.
- **Sync failed:** Click Reconnect and sign in again; tokens expire when passwords change.

ADMINS ONLY

Settings · Texting registration

Your store's own texting number, registered with the phone carriers (10DLC). Customer texts only go out once it is approved.

1. Fill in Business details exactly as on your IRS EIN letter: legal name, business type, EIN, address and a contact person.
2. Click Save details; anything still missing is listed.
3. Click Submit for registration. Ringo buys a local number for your store and sends your details to the carriers through Twilio.
4. Watch the steps: business profile, messaging profile, brand, campaign. Approval usually takes 1–3 weeks.
5. When it shows Approved, texts to customers who agreed go out from your number automatically.

> **Tips:** Until it is approved, customer texts are skipped and shown as "Not sent" on the Texts screen. Calls work the whole time. Tick "Also register marketing texts" only if you will send offers; customers still have to agree to marketing separately.

If something's wrong

- **Failed:** Read the reason shown, fix the details (most often the legal name or EIN does not match IRS records) and submit again.
- **No EIN (sole proprietor):** Email support@ringoretail.com; sole-proprietor registration is set up by hand.

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: Admin, Manager or Employee.
3. Click Send invite; they get a sign-in email.
4. Click Remove to turn off someone's login (Restore brings it back).

> **Tips:** Managers can do everything except Settings. Employees never see costs. Set hourly rates here for labor cost.

ADMINS ONLY

Settings · Plan & billing

Your plan, add-ons and billing.

1. Compare Front Desk, Back Office and Full Growth.
2. Click Upgrade on the plan you want and finish payment.
3. Add the Marketing Crew add-on here.

ADMINS ONLY

Settings · Your data

Download all your store data or close your account.

1. Click “Download my data” for a full export.
2. To close the account, type your company name and click “Close my account”.

> **Tips:** Your store data stays yours.

ADMINS ONLY

All customers

Ringo Retail staff view: every store, its plan, status, setup progress and revenue.

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.
3. Click a store to view it as staff.
4. Use “Back to all customers” to return.

RINGO RETAIL STAFF (SUPERADMIN)

We're here to help.

Ringo Retail

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