Ringy Onboarding And Setup

1) **Use this link to get 1 month free: https://app.ringy.com/sign-up/gp1**
    a) Click Link
    b) Type First Name Last Name Phone Number and Timezone than Click continue
    c) Company name “**usha**” skip the rest than Click continue
    d) Type in email and password to create account click continue
    e) Type in credit card info and check agree (First month is free if using the link. Should be a 0$ charge)
    f) Click create account
    g) Confirm email verification by clicking on the link sent to your email

2) **Login to your New Ringy Account!**
    a) A pop up will ask you if you’d like to start onboarding. Click “Not Now” (You will do this later!)

3) **Turn On Ringy Master Switch From Dashboard**
    a) (If you don’t see it at the top of your screen, then it is already on)

4) Hover over the toolbar on the left side of the screen. **Click Billing**
    a) Add $150 To My Funds
    b) Click Power Dialer + Unlimited Voice - $70
    c) Click Update Subscription.

5) Hover over the toolbar on the left side of the screen. **Click Onboarding**
    a) Click Next
    b) Download App To Cell (Log in to account, make sure it works)
    c) Click Next
    d) Identify Company Name, is already done for you, just click next.
    e) Purchase Phone Numbers In These States (AL,AR,CO,FL,GA,IL,IN,KS,KY,LA,MS,MO,MT,NE,NV,NC,OH,OK,SC,SD,TN,TX,UT,VA, WV,WI,WY)
    f) Scroll Down Click I Agree and Click Purchase and than Click Next
    g) Select Compliance - Choose “stopall to opt out”!
    h) Click Finish to complete

6) Hover over the toolbar on the left side of the screen. **Go To Account Settings**

a) Click Enterprise
b) If your account is already connected to Michael Lawson's USHealth Advisors account- you're good!
c) If you are NOT CONNECTED, Type "USHA"
d) Click Authorize And Connect

7) Hover over the toolbar on the left side of the screen. **Go To Account Settings**

a) Click General and Click Sync Account
b) Type In Sync Account Email Address and Type Email And Send Sync Request to your leader, either Doug, Paul, or Harley - ***** NOT ALL 3!!!! *****
    i) *Paul@VitalityInsuranceGRP.com* - Text Paul after (941-224-4789)
    ii) *dalonzo250@gmail.com* - Text Doug after (727-902--8024)

AFTER ACCOUNT HAS BEEN SYNCED GET WITH LEADER TO GET THE REST SET UP

8) Set up **"Leadmall Premium and Shared" and "Leadmall Aged" Lead Vendors**

a) Click New Lead Vendor
    i) Click My lead vendor is not listed
        (1) Enter Lead Vendor name
        (2) Type in Email "priovolos.office@ushadvisors.com" so nicole can sync account
    ii) Scroll down to "Lead Distribution Settings"
        (1) Click import Leads Into The Power Dialer
    iii) Scroll down to "Contact Settings"
        (1) Check both boxes for text and email
        (2) Trigger automated action
            (a) Select leadsmall
    iv) Scroll down to "Report Settings"
        (1) Select "Company Power Dialer Statuses" from the drop down
        (2) Attach lead vendor setup code " GP1"
    v) Scroll down to "Enterprise Setting"
        (1) Check the box "Send a Copy of each lead…"
    vi) Click Update Lead Vendor On Bottom Right. (It will redirect To The Lead Vendor Page)

    b) **Manually copy Integrations and Email to Nicole. Specify in the email which integration is for premium and aged.**

9) **Set Up Power Dialer Campaigns**
    a) Click the wrench icon on the top right
    b) Click Dialer Campaigns
    c) Click New Campaign
        i) Name “Personal leads”
    d) Click “lead Vendor”
        i) Select Leadsmall
    e) Bottom right click Save

10) **Connect Google Calendar**
    a) Click Connect Google Calendar And Select Your Personal Calendar And Select Allow All
    b) Top Right Click Select Calendar And Connect Calendar And Click Make Default
    c) If Having Trouble Call Ringy For Help

11) **Set up voicemail drop**
    a) Click Account settings
    b) Click manage account
    c) Click voicemail drop
    d) Record 2-3 voicemails “ Hey this xxxx please give me a call back”

12) **Set up Email Compliance**
    a) Go to marketing and click email
    b) Click settings click email compliance
    c) Fill out the form and hit save

AT THIS POINT YOU'RE ABLE TO START DIALING!

13) **Create Producer Page** - (If No NPN Stop Here Until NPN Obtained)
    a) If You Don’t Know your NPN - “Google What Is My NPN”
        i) If there is no NPN it will usually appear 3 business days later
    b) Account Settings

c) Producer Page
d) Page Link- Type In First Last Name
e) Hit Next On Bottom Right
f) Add Professional Picture
g) Type In Occupation “National Insurance Advisor”
h) Type In A Professional “About Me”
i) Click Next
j) Select Products Offered Select Affordable Health Insurance
k) Hit Next
l) Type In National Producer Number And Add Picture Of State License (Cannot Be Screenshot)
m) Click Next
n) Select Carriers
o) Select Them all
p) Click Next
q) Click Create Page

14) Hover over the toolbar on the left side of the screen and **Click Phone Setup**
   a) Click Business Profile
   b) Click Standard $44 (You have already funded your account to cover this, it is not an additional cost.)
   c) Enter In All Business Information EXACTLY How It Appears On The EIN PDF Letter
   d) Click “Private” as your business entity type
   e) Under Business Website Use Your Ringy Business website That You Just Created (must be lowercase)
   f) Enter all information then hit next
   g) After the Business Profile is created call Ringy and they will Create your A2P Campaign!

15) Call Ringy To **Get Booking Page Created (they will create for you)**
   a) 720-764-5467