

Getting Started Guide

Everything your team needs to record, transcribe, and share call updates — start to finish.

1. What RingLedger Does

RingLedger records your business calls, transcribes them automatically, and turns each one into a clean written summary — an executive overview, key points, and action items — so nothing important gets lost or misremembered. Everything is organized by project, so your calls, contacts, and notes for one job all live in one place.

2. Getting Your Account Set Up

If you're the first person from your company

Your company's account and login were set up directly with RingLedger, along with your first Admin login and a Company Join Code.

If you're joining a team that's already set up

You'll need two things from your Admin: the login link, and the Company Join Code.

- Open the login link your Admin sent you.
- Tap the "Join Company" tab.
- Enter the Company Join Code, your name, email, and a password.
- Phone number is optional — only provide one if you'd like to receive text alerts (see Section 9).
- Tap "Join Company" — you're in.

Tip: If you already have a login, just use the "Log In" tab instead with your email and password.

3. Placing Your First Call

RingLedger works with the phone you already have — there's no separate app or hardware.

- Tap the phone icon at the top of your screen (from the home screen, or from inside a specific project).
- Enter your own phone number.
- Search for the person you're calling in your saved contacts, or type their number directly.
- Tap "Start Call."
- Your own phone will ring first — answer it.
- RingLedger will then dial the other person and connect you both. A short recorded message plays first, letting both of you know the call is being recorded.

Tip: If you started the call from inside a project, it's automatically filed there. If you started it from the home screen, it lands in "Unassigned" — move it into the right project once you're done.

4. After the Call: Recording, Transcript, and Summary

Once your call ends, RingLedger gets to work automatically — usually within a few minutes:

- The full audio recording becomes available to play or download.
- A complete transcript is generated.
- An AI-written summary is created, broken into an Executive Summary, Key Points, and Action Items.

Open any call from its project to see all of this on one screen, organized into a Summary tab and a Transcript tab.

5. Organizing With Projects

A project is your folder for one job or client — it holds the calls, contacts, and notes that belong together.

Creating a project

- Tap the "+" button on your Projects screen.
- Name the project and, optionally, add a client name.
- Pick a category — this also sets a default banner photo if you don't upload your own.
- Save.

Editing a project later

Open any project and tap Edit to change its name, client name, or category at any time. If you never uploaded your own photo, changing the category automatically updates the photo to match — a custom photo you uploaded is always left untouched. A "Remove Photo" option is also available if you'd rather fall back to the category's default image.

Adding contacts to a project

From a project's page, tap "+ New Contact" to add someone new, or "Link Existing" to attach a contact you've already saved elsewhere.

6. Sharing Updates With Clients and Stakeholders

Anyone who wasn't on the call — a client, a partner, anyone who needs to stay in the loop — can be sent the recording, transcript, and summary directly.

- Open the call you want to share.
- Tap the send icon at the top of the screen.

- Choose from your saved contacts (use "Select All in This Project" to grab everyone linked to that job at once), or add someone by name and email/phone right there.
- Tap "Send."

The person you send it to gets an email and/or text with a link — clicking it opens a page with the recording player, summary, key points, action items, and full transcript, no login required.

Texting a business contact for the first time

Before any real update text goes to a saved Contact, they're sent a one-time message asking them to reply YES to confirm they want text updates. Once they reply YES, the update they were waiting on is sent automatically — you don't need to resend anything. If they don't reply, or reply with anything other than YES, no further texts are sent to them; a later "Send Update" won't keep re-asking.

Seeing who a call was sent to

Open any call and check the "Sent To" section to see its send history — the 3 most recent are shown, with a "+N more" link if there's a longer history.

7. Notes, Chat, and @Mentions

Each call has its own running chat thread — separate from the AI transcript — for corrections, extra context, or just messaging a teammate.

- Type your message in the note box at the bottom of a call's Summary tab, or open the full-screen chat view for a longer conversation.
- To get a specific teammate's attention, type "@" followed by their name and pick them from the dropdown. They'll get a distinct notification, separate from the normal unread count — by email always, and by text too if they've opted in to text alerts (see Section 9).

Seeing who's viewed a call

A small eye icon with a number shows on each call in a project's list, counting how many teammates have opened it. On the call's own detail page, a fuller badge names the most recent viewer (e.g. "Sarah +4 others") — tap it for the full list with when each person last viewed it. This is purely informational; opening a call never sends a notification to anyone.

8. Managing Your Team (Admins Only)

Seeing your seat usage

Your Account page shows "X of Y seats used" right below your company join code.

Inviting teammates

Go to Account, find the "Company Join Code" section, and tap "Share Invite" — this opens your phone's share sheet with the login link and code ready to send by text or email (on desktop, it's copied to your clipboard instead).

Removing a teammate

From Account, find the person under Team Members and tap Remove.

If a join code needs to be reset

Tap "Regenerate" next to the join code. This immediately invalidates the old code, so anyone who hasn't joined yet will need the new one.

9. Your Own Account Settings

Any team member can update their own name, email, and phone number at any time from Account — find the "Edit Profile" section, make your changes, and tap Save Changes.

Phone number is always optional. It's only used if you check the box agreeing to receive account-related texts (like password reset links) and @mention alerts, up to about 10 messages a month — you can opt in or out at any time, and can reply STOP to any text to opt out immediately.

Tip: If you change your phone number, text consent resets — you'll need to re-check the box in Edit Profile if you'd like alerts at your new number, since consent is tied to the specific number you originally agreed for.

10. Billing

Billing runs monthly, per seat, through a card on file processed securely by Stripe. If you're on a free trial, your card is on file but not charged — nothing is billed unless you continue past the trial period.

Admins can see your current billing status any time from the Account page's Billing section — either your trial countdown (with the exact date it ends) or your next billing date if you're past the trial.

Canceling

Admins can cancel from the same Billing section at any time. Canceling stops future billing but doesn't cut off access immediately — you keep full access through the rest of whatever period you've already paid for, and simply aren't charged again after that. If you change your mind before that period ends, a "Resume Subscription" button undoes the cancellation cleanly.

11. Your Data

Your company's calls, contacts, projects, and notes are completely isolated from every other company using RingLedger — no one outside your account can see them. Within your own company, though, calls and their activity (like who's viewed a call, or who an update was sent to) are visible to your whole team, not just the people directly involved — that's intentional, so nothing gets siloed with just one person.

If you ever cancel your subscription, your data isn't touched at all — canceling only affects future billing. If your account is ever fully closed, your data stays available for 90 days afterward so you have time to export anything you want to keep.

12. Getting Help

The in-app Help screen (the question-mark icon) has a searchable library covering everything in this guide and more. For anything else, reach out directly:

help@ringledger.io