



SETUP GUIDE

Add **AI** Text-Back to RingCentral

The 5-minute setup checklist for RingCentral admins

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AI Voice Assistant + AI SMS for small businesses

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The 5-Minute RingCentral AI Text-Back Setup Checklist

Add an AI-powered missed-call text-back layer to your RingCentral phone system without changing your number, your call routing, or your VoIP plan.

Source file: This is the markdown source. Convert to PDF via Canva (recommended), Notion export, or any markdown-to-PDF tool. Final PDF goes at [client/public/lead-magnets/ringcentral-setup-checklist.pdf](#) .

Why Use an AI Text-Back Layer at All

RingCentral users have been asking for built-in AI text-back **since 2021** — the most-upvoted feature request on RingCentral's Ideas board ("Auto reply SMS to missed calls") has 142 votes and is marked "Planned" but not delivered. RingCentral support even *removed* their old missed-call automation templates over compliance concerns.

Meanwhile:

- **62% of calls to small businesses go unanswered** (411 Locals, 85 businesses surveyed)
- **80% of voicemail callers never leave a message** — they call your competitor instead
- **The average SMB loses \$126,000 per year** to missed calls
- **37% of 1-star Google reviews** for home service businesses cite "I called and no one answered"

PepperSend bolts on top of your existing RingCentral setup. Five minutes of configuration. No phone system replacement. No port-out. No new number for your customers to dial.

What You'll Need Before You Start

- [] Your RingCentral admin login (the one that can edit Call Handling rules)
- [] About 5 minutes of focused time
- [] A second phone to test with (yours or a teammate's)

- [] A short written description of your business — services, hours, pricing if applicable, common questions you get

That's it. No developers. No IT consultant. No hardware.

The 5 Steps

Step 1 — Sign up for PepperSend (60 seconds)

1. Visit peppersend.com/signup
2. Sign in with your Google account (one click — no password to set)
3. Pick a plan:
 - **Starter** (\$10/mo + pay-as-you-go) — best for testing or low call volume
 - **Solo** (\$29/mo) — includes 200 SMS + 15 AI voice minutes
 - **Team** (\$79/mo) — includes 600 SMS + 30 AI voice minutes
 - **Business** (\$199/mo) — includes 1,500 SMS + 75 AI voice minutes, multi-location, white-label

Or start the **14-day free trial** — no credit card required.

✓ **Done when:** you're logged into your PepperSend dashboard.

Step 2 — Train the AI on your business (2-3 minutes)

1. Click **Knowledge Base** in the left sidebar
2. Pick one of three input methods:
 - **Paste text** — copy/paste your business info into the editor
 - **Import a Google Doc** — paste a Google Doc share URL, AI extracts and structures it
 - **Upload a file** — drop a PDF, CSV, or XLSX with your business info; Gemini converts it
3. Review the parsed Knowledge Base. Edit anything that's off.
4. Click **Save**.

KB starter template (copy-paste this and customize):

BUSINESS NAME: [Your business name]

WHAT WE DO:

[2-3 sentences about your services]

SERVICE AREA:

[Cities, counties, or radius you cover]

HOURS:

[e.g., Mon-Fri 8am-6pm, weekends emergency only]

PRICING:

[Service call fee, hourly rate, common job ranges]

EMERGENCY POLICY:

[How you handle urgent calls – same-day, after-hours, etc.]

COMMON QUESTIONS:

Q: Do you offer free estimates?

A: [Your answer]

Q: Are you licensed and insured?

A: [Your answer]

Q: How quickly can you respond?

A: [Your answer]

[Add 5-10 more Q&A pairs based on the questions you get most often]

✓ **Done when:** the AI Test playground (also in the KB tab) responds accurately to a sample question about your business.

Step 3 — Get your dedicated AI Text-Back number (60 seconds)

1. Click **Integrations** in the sidebar
2. Look for the **AI Text-Back Number** card
3. Click **Provision** — PepperSend orders a number from Telnyx and binds it to your AI Assistant
4. Copy the number that appears (format: **+1XXXXXXXXXX**)

✓ **Done when:** you have a US phone number on screen and a green "Active" badge next to it.

Step 4 — Configure RingCentral call forwarding (2 minutes)

This is the only step that touches RingCentral.

1. Sign in to RingCentral admin at service.ringcentral.com

2. In the left sidebar, click **Phone System**
3. Click **Phones & Devices**
4. Click the line/extension you want to enable AI text-back on (most businesses start with the main number)
5. Click the **Call Handling** tab at the top
6. Find the section for **"After hours"** or **"When unavailable"** rules
 - For 24/7 coverage, configure both
7. Set the action to **"Forward to external number"**
8. Paste your PepperSend AI Text-Back number from Step 3
9. Set **"Forward after"** to **3-4 rings** — this gives you a chance to answer in person before the AI takes over
10. (Recommended) Enable **"Send call to extension's voicemail if external forward fails"** as a safety net
11. Click **Save**

Multi-extension shops, repeat for each extension you want covered. Each extension can have its own AI text-back number if you want different behavior per line.

Multi-location shops, same drill — each location should get its own PepperSend AI Text-Back number, so you can train each AI on the right local KB (different hours, different staff, different service area).

✓ **Done when:** RingCentral shows your AI Text-Back number in the forwarding rules and confirms the save.

Step 5 — Place a test call (30 seconds)

1. From a phone that's NOT a RingCentral extension (your mobile, a teammate's phone), dial your main RingCentral number
2. Let it ring through to the unanswered state (don't pick up)
3. Within 5-10 seconds, the calling phone should receive an SMS like:

"Hi! You just called [Your Business] and we missed you. I'm Pepper, the AI assistant. How can I help?"

4. Reply with a real question — e.g., *"Do you do emergency repairs?"*
5. The AI should respond using the KB you trained in Step 2

✓ **Done when:** you've completed at least one full back-and-forth text exchange with the AI.

Verification Checklist

Run through this after Step 5 to confirm everything works.

- Test call reaches the AI text within 10 seconds
- Customer-facing AI text correctly identifies your business name
- AI's first response is grammatically correct and on-brand
- AI answers a question about your services using info from the KB (not generic)
- AI answers a question about your hours correctly
- AI answers a question about pricing correctly
- When you say "I want to book an appointment," the AI starts collecting details
- When you say "Can a human call me back?", the AI confirms a handoff
- STOP keyword stops further messages (test once with a throwaway phone if you want to verify TCPA compliance)
- Both during-hours and after-hours forwarding rules in RingCentral point to the AI number

If any item fails, check the corresponding section in the PepperSend dashboard's **Knowledge Base** → **Test AI** playground to debug.

Common RingCentral Configuration Pitfalls

1. **Forwarding only after 6+ rings** — too long. Customers hang up at ring 4. Use 3-4.
 2. **Only forwarding "after hours"** — this misses calls during your busy day when your team is on the phone. Configure both "after hours" AND "when unavailable."
 3. **Forwarding the main IVR menu instead of an extension** — if your RingCentral has an auto-attendant, forward at the *destination extension* level, not the IVR level. Otherwise the AI gets the IVR audio instead of a customer.
 4. **Forgetting to save** — RingCentral's UI requires explicit save. Always confirm the green "Saved" toast before closing the page.
 5. **Not testing with multiple phone types** — test from a mobile (likely customer scenario), a landline (some commercial customers), and a number with a blocked caller ID if your business gets those.
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What Your Customers Will Experience

Before PepperSend:

Customer dials your number → 4 rings → voicemail → customer hangs up → 80% of the time, they call your competitor.

After PepperSend:

Customer dials your number → 4 rings → forwarded to AI → within 5 seconds the customer's phone buzzes with a friendly text from your business → customer replies → AI answers using your KB → customer either books an appointment, gets their question answered, or asks for a callback. Your team gets the conversation context delivered.

The AI handles the easy stuff (business hours, service area, pricing questions, simple booking). It hands off cleanly when the customer wants a human or the question is outside your KB.

What You're Charged For

PepperSend uses metered billing on top of your monthly platform fee:

- **\$0.044 per outbound SMS message** (a typical conversation has 3-5 outbound messages)
- **\$0.20 per minute of AI voice** (only relevant if you also enable AI Voice Assistant for inbound calls — separate feature, not part of this setup guide)

Bundled plans (Solo / Team / Business) include a usage allowance before the metered rate kicks in.

You will NOT pay extra for:

- Inbound SMS messages (free)
 - The Telnyx phone number rental (built into the platform fee)
 - Knowledge Base storage or AI training
 - Onboarding or support
 - TCPA compliance handling (built in: quiet hours, opt-out enforcement, state-specific rules)
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TCPA Compliance — What's Built In

PepperSend handles the legal stuff so you don't have to. Built-in:

- **Quiet hours** — no auto-texts before 8am or after 9pm in the recipient's timezone (federal rule)
- **State-specific rules** — Florida, Connecticut, and Texas have stricter limits, all enforced
- **STOP keyword** — instantly opts out the recipient and adds them to a fail-closed blacklist (DB checked before every send)
- **Opt-out audit log** — immutable 4-year log meets the TCPA statute of limitations
- **First-message disclosure** — every initial outbound text includes "Reply STOP to opt out" + your business identifier

If you're a heavy SMS user (200+ messages/day), also register for 10DLC through the dashboard. PepperSend walks you through it.

Need Help?

- **Live demo:** call **(855) 286-9330** — speak to PepperSend's own AI Voice Assistant on the contact page
 - **Email:** cameron@peppersend.com
 - **Documentation:** peppersend.com/docs
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Ready to set up? Start at peppersend.com/signup.

This guide is for RingCentral users. The same general pattern works for Intermedia Elevate, Vonage, Grasshopper, Nextiva, and any VoIP that supports "forward to external number" in its Call Handling settings. PepperSend is not affiliated with RingCentral, Inc.