



Account profile and preferences

Purpose

Review and edit your account profile (name, contact details, and workspace memberships) and set your personal language and theme preferences.

Prerequisites

- A portal account, signed in.

Steps

1 Step 1

The screenshot displays the Ringle application interface. On the left is a sidebar with the Ringle logo at the top, followed by a dropdown menu for 'Demo Auto Shop @demo-autoshop'. Below this are sections: 'OVERVIEW' with 'Dashboard' and 'Analytics'; 'CONVERSATIONS & AI' with 'Blueprints', 'Experiments', 'Intents', 'LLM Prompts', 'Capabilities', and 'Engine Behavior'; 'TEST DRIVE' with 'Text Chat' and 'Voice Demo'; and 'VOICE & MESSAGING' with 'Voice Conferencing', 'Account Settings' (highlighted), and 'User Guide'. At the bottom of the sidebar is a 'Demo Owner' toggle switch and a 'Log Out' button. The main content area is titled 'Account Settings' and has three tabs: 'Profile' (selected), 'Security', and 'Preferences'. The 'Profile' tab shows a user card for 'Demo Owner' (owner@getringle.com) with an 'Edit' button. Below the card are input fields for 'First Name' (Demo), 'Last Name' (Owner), 'Email' (owner@getringle.com, marked as Verified), and 'Phone'. A 'Businesses' section lists 'Demo Auto Shop' (Active, Owner) and 'Demo Ecommerce Store' (Owner).

⚡ Action: From any portal page, click Account Settings near the bottom of the sidebar. It sits directly above your name and the Log Out button.

✅ What you should see: The Account Settings page opens on the Profile tab. Three tabs are available at the top: Profile, Security, and Preferences.

2 Step 2

The screenshot shows the Ringle web application interface. On the left is a sidebar with the Ringle logo at the top, followed by a dropdown menu for 'Demo Auto Shop @demo-autoshop'. Below this are sections: 'OVERVIEW' with links to Dashboard and Analytics; 'CONVERSATIONS & AI' with links to Blueprints, Experiments, Intents, LLM Prompts, Capabilities, and Engine Behavior; 'TEST DRIVE' with links to Text Chat and Voice Demo; and 'VOICE & MESSAGING' with a link to Voice Conferencing. At the bottom of the sidebar are links for Account Settings and User Guide, a toggle for 'Demo Owner', and a 'Log Out' button. The main content area is titled 'Account Settings' and has three tabs: Profile (selected), Security, and Preferences. The Profile tab displays a user card for 'Demo Owner' with email 'owner@getringle.com' and an 'Edit' button. Below the card are fields for First Name (Demo), Last Name (Owner), Email (owner@getringle.com with a Verified badge), and Phone (a dash). A 'Businesses' section lists 'Demo Auto Shop' (Active, Owner) and 'Demo Ecommerce Store' (Owner).

⚡ Action: Review the Profile tab.

✓ **What you should see:** The top card shows your avatar initials, display name, and email, with an Edit button at its top right. It is followed by First Name, Last Name, Email, and Phone. Email carries a Verified badge when the address is confirmed. Phone shows a dash when no number is on file. The Businesses card lists every workspace your account belongs to, with your role in each (for example Owner). The workspace you are currently using carries an Active badge.

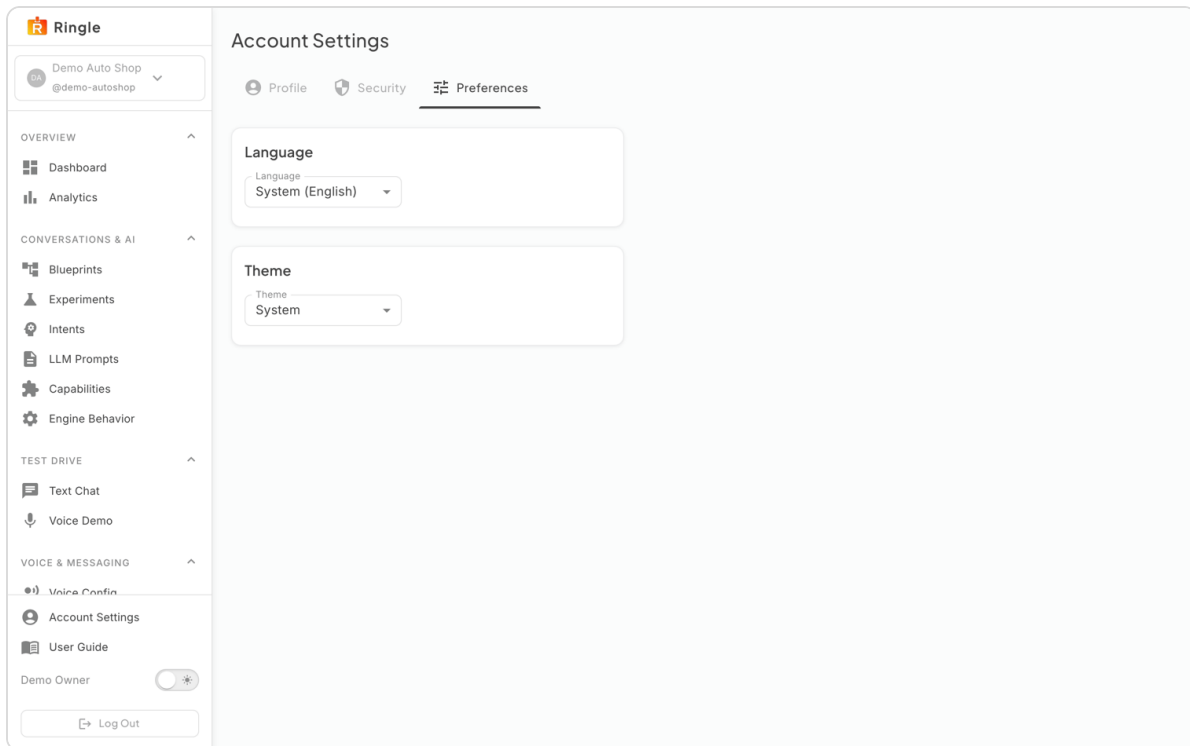
3 Step 3

The screenshot shows the Ringle web application interface. On the left is a sidebar with the Ringle logo at the top, followed by a dropdown menu for 'Demo Auto Shop @demo-autoshop'. Below this are sections: 'OVERVIEW' with links to Dashboard and Analytics; 'CONVERSATIONS & AI' with links to Blueprints, Experiments, Intents, LLM Prompts, Capabilities, and Engine Behavior; 'TEST DRIVE' with links to Text Chat and Voice Demo; and 'VOICE & MESSAGING' with a link to Voice Conferencing. At the bottom of the sidebar is the user's name 'Demo Owner' with a toggle switch and a 'Log Out' button. The main content area is titled 'Account Settings' and has three tabs: 'Profile' (selected), 'Security', and 'Preferences'. The 'Profile' tab shows a profile card for 'Demo Owner' with email 'owner@getringle.com'. The card is in an edit state, displaying input fields for First Name (containing 'Demo'), Last Name (containing 'Owner'), Email (containing 'owner@getringle.com'), and Phone. Below these fields are 'Cancel' and 'Save' buttons. Underneath the profile card is a 'Businesses' section listing 'Demo Auto Shop' (with 'Active' and 'Owner' tags) and 'Demo Ecommerce Store' (with an 'Owner' tag).

⚡ Action: Click Edit on the profile card to change your details. Update the fields you want. Click Save. Cancel leaves everything unchanged.

✓ What you should see: The card switches to editable First Name, Last Name, Email, and Phone fields with Cancel and Save buttons underneath. Save stays disabled while the Email field is empty. Saving shows a "Profile updated" message and returns the card to its read-only view. Your name in the sidebar updates right away. If nothing was changed, Save closes the edit view.

4 Step 4



⚡ Action: Click the Preferences tab. Pick a language from the Language selector and a theme from the Theme selector.

✓ What you should see: The Language card controls the portal display language. System (English) follows your browser language. The Theme card switches between light, dark, and System. The System theme follows your operating system setting. Choices apply to your account right away.

Troubleshooting

- The sidebar has no Account Settings entry: your session may have expired and the page you see is a public one. Sign in again and retry.
- Save is greyed out in the edit view: the Email field cannot be left empty. Restore an address or click Cancel.

- Theme looks unchanged after picking System: System mirrors your operating system. Change your OS appearance or pick Light or Dark explicitly.
- A workspace you expect is missing from Businesses: your account has not been granted access to it. Ask an owner of that workspace to invite you.

Notes

- Routes: `/account/profile` and `/account/preferences` .
- Source component: `pages/account/AccountPage.jsx` (tabs implemented in `AccountProfileTab.jsx` and `AccountPreferencesTab.jsx`) in the portal app.
- The Security tab of the same page is covered in the "Account security and sessions" guide.
- The Active badge marks the workspace currently loaded in the sidebar; switch workspaces from the workspace selector at the top of the sidebar.