



# Creating a demo workspace

## Purpose

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Create a personalized demo workspace from the onboarding form: name it, pick a business sector, choose the assistant's tone and brand vibe, and select the languages it should speak.

## Prerequisites

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- A browser session on the portal. Arriving from the marketing site's Try the demo button signs you in automatically; no account setup is needed.
- An account that does not already have a workspace. If yours does, the portal returns you to that workspace instead of showing this form.
- No other setup: demo workspaces run on built-in demo data and are safe to experiment with.

## Steps

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## 1 Step 1

### Set Up Your Demo

Tell us about your business so we can personalize your experience.

#### Name Your Workspace

#### What type of business?

#### What tone?

#### What brand vibe?

#### What languages?

Choose 1 to 3 languages for your demo

Create Workspace

⚡ **Action:** Go to <https://portal.getringle.com/demos/new>, or click Try the demo on the marketing site.

✓ **What you should see:** The "Set Up Your Demo" form loads with five sections: Name Your Workspace, What type of business?, What tone?, What brand vibe?, and What languages?. The Create Workspace button is disabled until every field is filled in.

## 2 Step 2

### Set Up Your Demo

Tell us about your business so we can personalize your experience.

**Name Your Workspace**

Workspace Name

**What type of business?**

Business Sector

Ecommerce/Retail

**What tone?**

Tone

Friendly

**What brand vibe?**

Brand Vibe

Modern

**What languages?**

Languages

English (US)

Choose 1 to 3 languages for your demo

Create Workspace

⚡ **Action:** Type a workspace name. Then pick a Business Sector. The sectors offered are Restaurant, Ecommerce/Retail, and Auto Shop.

✓ **What you should see:** The name and sector show in the form. The sector decides what kind of demo data you get and which order panel appears next to conversations. Pick the one closest to your business (this guide uses Ecommerce/Retail).

### 3 Step 3

#### Set Up Your Demo

Tell us about your business so we can personalize your experience.

##### Name Your Workspace

Workspace Name  
Guide Ecommerce

##### What type of business?

Business Sector  
Ecommerce/Retail

##### What tone?

Tone  
Friendly

##### What brand vibe?

Brand Vibe  
Modern

##### What languages?

Languages  
English (US)

Choose 1 to 3 languages for your demo

Create Workspace

⚡ **Action:** Pick a Tone: Warm, Professional, Friendly, Confident, Playful, Luxury / Refined, Reassuring, or Direct. Then pick a Brand Vibe: Modern, Corporate, Luxury, Bohemian, Punk / Edgy, Hipster, Minimalist, Techy, Family-Friendly, Wellness / Calming, or Other.

✓ **What you should see:** Both dropdowns show your choices. These shape how the assistant phrases its replies in this workspace.

## 4 Step 4

### Set Up Your Demo

Tell us about your business so we can personalize your experience.

**Name Your Workspace**

Workspace Name

**What type of business?**

Business Sector

**What tone?**

Tone

**What brand vibe?**

Brand Vibe

**What languages?**

Languages

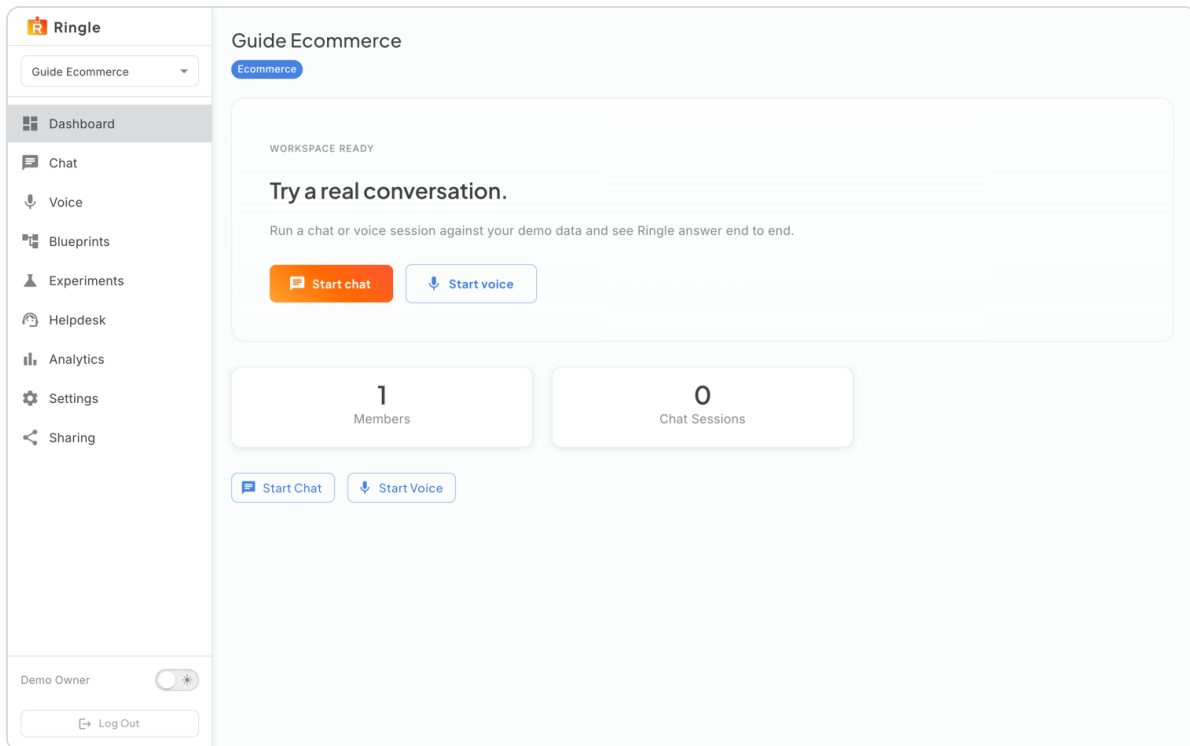
Choose 1 to 3 languages for your demo

Create Workspace

⚡ **Action:** Open the Languages field. Pick one to three languages. Each choice appears as a removable chip.

✓ **What you should see:** The helper text under the field reads "Choose 1 to 3 languages for your demo". Once three are picked, the remaining options are disabled. With every field filled, the Create Workspace button becomes active.

## 5 Step 5



**⚡ Action:** Click Create Workspace.

✓ **What you should see:** The button shows a brief creating state. Then you land on the new workspace's dashboard. The workspace name and a sector chip appear at the top, and the sidebar shows the workspace navigation. Demo data (orders, subscriptions) is seeded for you in the background.

## Troubleshooting

- You are redirected to a dashboard instead of the form: your account already has a workspace or tenant, so the portal sends you there. The form only shows for accounts without one.
- Create Workspace stays disabled: every field is required, including at least one language. Check that nothing was left blank.

- The form shows grey placeholder bars instead of fields: the sector, tone, and language options load from the server. Give it a few seconds. If it does not recover, refresh the page.
- You cannot add a fourth language: three is the maximum per demo workspace. Remove a chip to swap one in.

## Notes

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- Route: `/demos/new` .
- Source component: `pages/demo-onboarding/DemoOnboardingPage.jsx` in the portal app.
- The sector choice matters later. Ecommerce/Retail workspaces show an OMS panel with Orders, Subscriptions, and Helpdesk tabs next to chat and voice conversations. Restaurant shows a POS panel with Orders only. Auto Shop (appointment booking) hides the panel entirely. See the "Text chat and the OMS panel" guide.
- After creation you land on `/demos/<workspace-id>` . The name, sector, and voice can all be changed later on the workspace's Settings page.