



Tenant dashboard

Purpose

The dashboard is the landing page for a business tenant: a quick read on the tenant, its POS provider, and call volume, plus shortcuts into conversations and the test drive pages.

Prerequisites

- A portal account with a tenant membership. Accounts without one are redirected to the tenant access page instead.
- If you belong to several businesses, check the switcher at the top of the sidebar first; the dashboard shows the active tenant only.

Steps

1 Step 1

The screenshot shows the Ringle dashboard for a user named 'Demo'. The sidebar on the left contains the following sections:

- OVERVIEW**
 - Dashboard (selected)
 - Analytics
- CONVERSATIONS & AI**
 - Blueprints
 - Experiments
 - Intents
 - LLM Prompts
 - Capabilities
 - Engine Behavior
- TEST DRIVE**
 - Text Chat
 - Voice Demo
- VOICE & MESSAGING**
 - Voice Conferencing
 - Account Settings
 - User Guide

At the bottom of the sidebar, there is a 'Demo Owner' toggle switch and a 'Log Out' button.

The main content area is titled 'Welcome back, Demo' and 'Demo Auto Shop'. It features three stat cards:

- Tenant:** Demo Auto Shop (with an 'Autoshop' badge)
- POS Provider:** Unknown
- Calls:** 1

Below the stat cards are three quick action buttons: 'Conversations', 'Text Chat', and 'Voice Chat'. A details card below these buttons shows the following information:

- Phone: +15555550102
- Email: Not configured
- Languages: en-US
- Forwarding: Not configured

⚡ Action: Sign in, or click Dashboard under Overview in the sidebar.

✓ **What you should see:** The page greets you by name with the tenant name underneath. A tenant with no calls and no conversation designs yet shows the "Welcome aboard" setup card, with three starting points: "Create your first conversation", "Connect Shopify", and "Try the demo tenant". A tenant that already has activity skips that card and opens straight to the stat cards, as the demo tenant here does. Either way you get three stat cards (Tenant, POS Provider, Calls), a row of quick actions, and a details card. The cards show loading placeholders for a moment while the tenant data arrives, then fill in.

2 Step 2

The screenshot shows the Ringle dashboard for a tenant named 'Demo Auto Shop'. The interface includes a left sidebar with navigation options: Overview (Dashboard, Analytics), Conversations & AI (Blueprints, Experiments, Intents, LLM Prompts, Capabilities, Engine Behavior), Test Drive (Text Chat, Voice Demo), and Voice & Messaging (Voice Config, Account Settings, User Guide). The main content area displays a welcome message and three stat cards: Tenant (Demo Auto Shop with an 'Autoshop' chip), POS Provider (Unknown), and Calls (1). Below these are buttons for Conversations, Text Chat, and Voice Chat. A details card lists contact and configuration information: Phone (+15555550102), Email (Not configured), Languages (en-US), and Forwarding (Not configured). At the bottom of the sidebar, there is a 'Demo Owner' toggle and a 'Log Out' button.

Ringle

Demo Auto Shop
@demo-autoshop

OVERVIEW

- Dashboard
- Analytics

CONVERSATIONS & AI

- Blueprints
- Experiments
- Intents
- LLM Prompts
- Capabilities
- Engine Behavior

TEST DRIVE

- Text Chat
- Voice Demo

VOICE & MESSAGING

- Voice Config
- Account Settings
- User Guide

Demo Owner ☐ *

Log Out

Welcome back, Demo

Demo Auto Shop

Tenant
Demo Auto Shop
Autoshop

POS Provider
Unknown

Calls
1

Conversations Text Chat Voice Chat

Phone
+15555550102

Email
Not configured

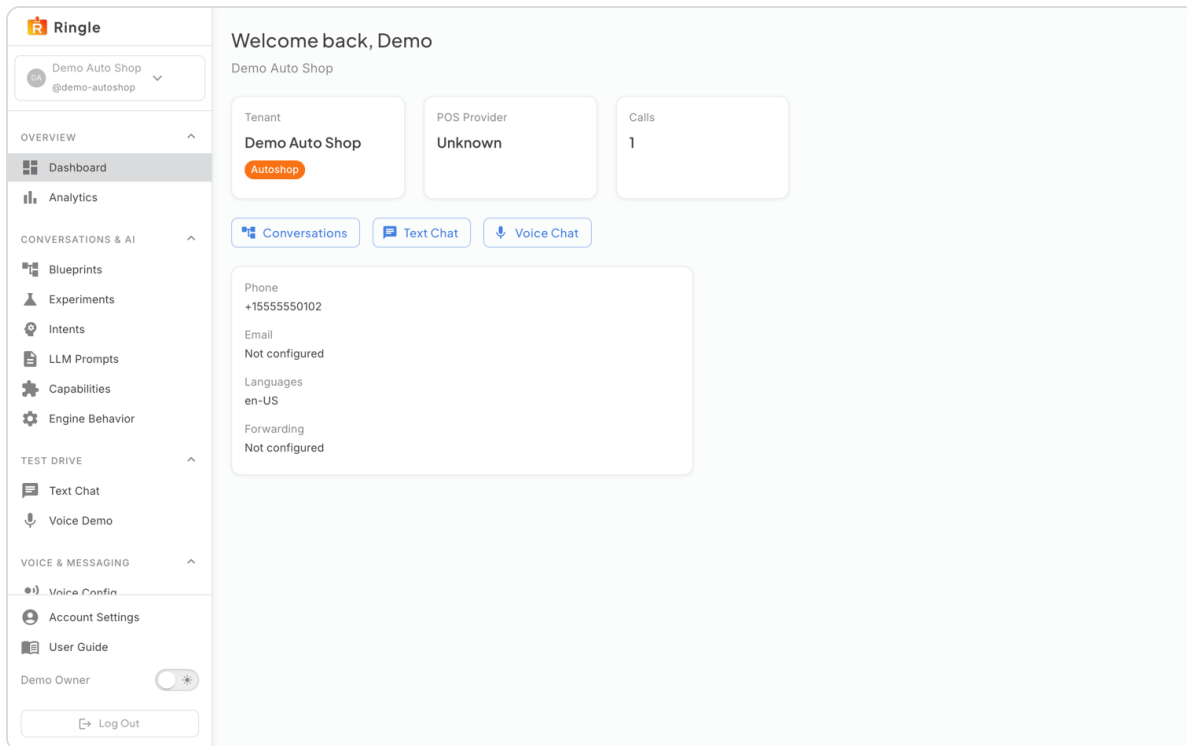
Languages
en-US

Forwarding
Not configured

⚡ Action: Read the stat cards and the details card once they have settled.

✓ What you should see: The Tenant card shows the business name with a sector chip. The POS Provider card names the connected provider, or reads "Unknown" when no POS is connected yet, as it does on the demo tenant here. Calls counts the tenant's sessions. The details card lists Phone, Email, Languages, and Forwarding; anything not yet set up reads "Not configured". Once the tenant has calls or conversation designs, the "Welcome aboard" card disappears.

3 Step 3



⚡ Action: Use the quick action buttons under the stat cards.

✓ What you should see: Conversations opens the tenant's conversation designs. Text Chat opens the text test drive. Voice Chat opens the voice test drive. These are the same destinations as the sidebar's Conversations & AI and Test Drive sections; the dashboard keeps them one click away.

Troubleshooting

- The Tenant or POS Provider card reads "Unknown": the tenant record has no name or POS provider on file yet. Fill them in on the Tenant Profile and Connections pages.
- Rows in the details card read "Not configured": phone numbers, email, and languages are set up under the Voice & Messaging pages and the Tenant Profile page, not on the dashboard itself.

Notes

- Route: `/dashboard` . Source component: `pages/DashboardPage.jsx` in the portal app.
- The “Welcome aboard” hero renders only while the tenant has zero calls and zero conversation designs; it is replaced by nothing once real activity exists, leaving the stat cards at the top.