



Tenant profile, API keys, and payment links

Purpose

Three Account & Access pages cover the tenant's own record: Tenant Profile edits the business details and provider assignments, API Keys issues and revokes tenant-scoped keys for the REST API, and Payments creates ad-hoc payment links and checks their status.

Prerequisites

- A tenant role with tenant settings permission; members without it do not see these three sidebar items.
- An API key's secret is shown exactly once at creation. Have a safe place to store it before you create one.

Steps

1 Step 1

Ringle

Demo Auto Shop
@demo-autoshop

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TEST DRIVE

- Text Chat
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VOICE & MESSAGING

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Demo Owner ☐ *

Tenant Profile

Update the tenant details the Edge API already supports.

Tenant Name Demo Auto Shop	Tenant Slug demo-autoshop
Contact Email	Phone Number +15555550102
Domain	Forwarding Number
Primary Integration	POS Provider
OMS Provider	Helpdesk Provider
Inbound Email Address	Primary Language en-US
Languages en-US Comma-separated locale codes, for example en-US, es-MX	

Phone Number

No phone number assigned. Request one from your administrator.

Preferred Area Code

Optional. Leave blank for any area code.

Action: Click Tenant Profile under Account & Access in the sidebar. Review the form. Only click Save tenant profile if you intend to change the live record.

What you should see: A single form appears. It has the tenant name, the locked slug, contact email, phone number, domain, and forwarding number. It also has the Primary Integration selector, the POS, OMS, and Helpdesk provider selectors, the inbound email address, the primary language, and the comma-separated language list. In the demo tenant the provider selectors are unset. Below the form, a Phone Number card shows the tenant's assigned number and its status; when no number is assigned, the card instead reads "No phone number assigned" and offers a Request Phone Number form with a preferred area code and reason (requesting a number provisions a real line, so this guide does not submit it).

2 Step 2

Ringle

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@demo-autoshop

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Log Out

API Keys

+ Create Key

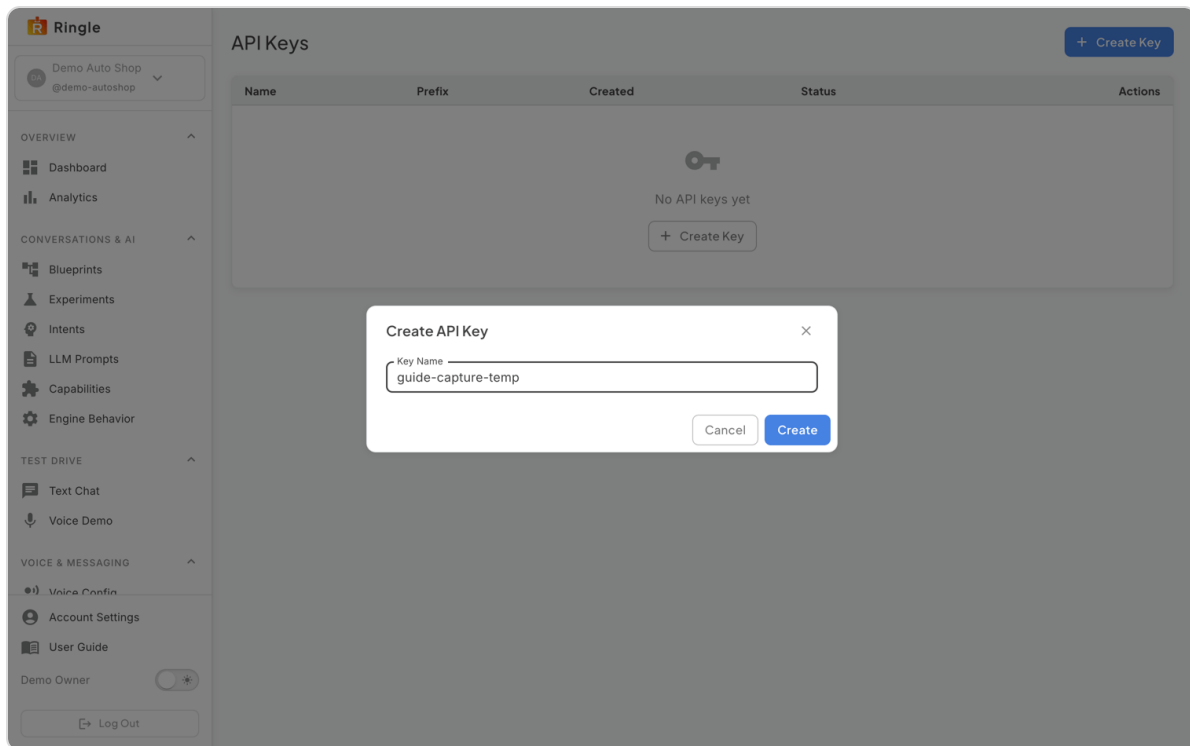
Name	Prefix	Created	Status	Actions
No API keys yet				

+ Create Key

⚡ Action: Click API Keys in the sidebar.

✓ What you should see: The API Keys page lists each key with its name, prefix (such as `rgl_tenant_2df7`), creation date, a status chip, and a revoke action. A Create Key button sits in the header. Only the prefix is stored for display. The full secret can never be retrieved later.

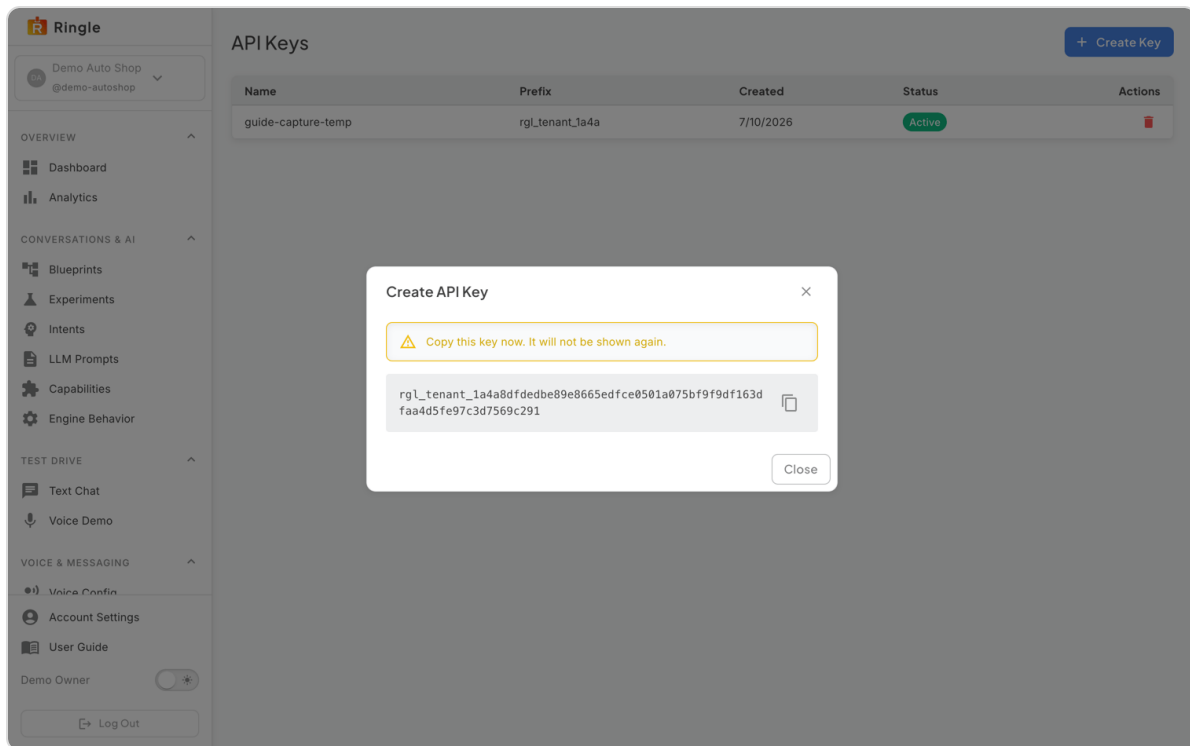
3 Step 3



⚡ Action: Click Create Key. Enter a descriptive name.

✓ What you should see: The Create API Key dialog has a single Key Name field. There are no scope options because tenant keys carry the tenant's API access. Create stays disabled until a name is entered.

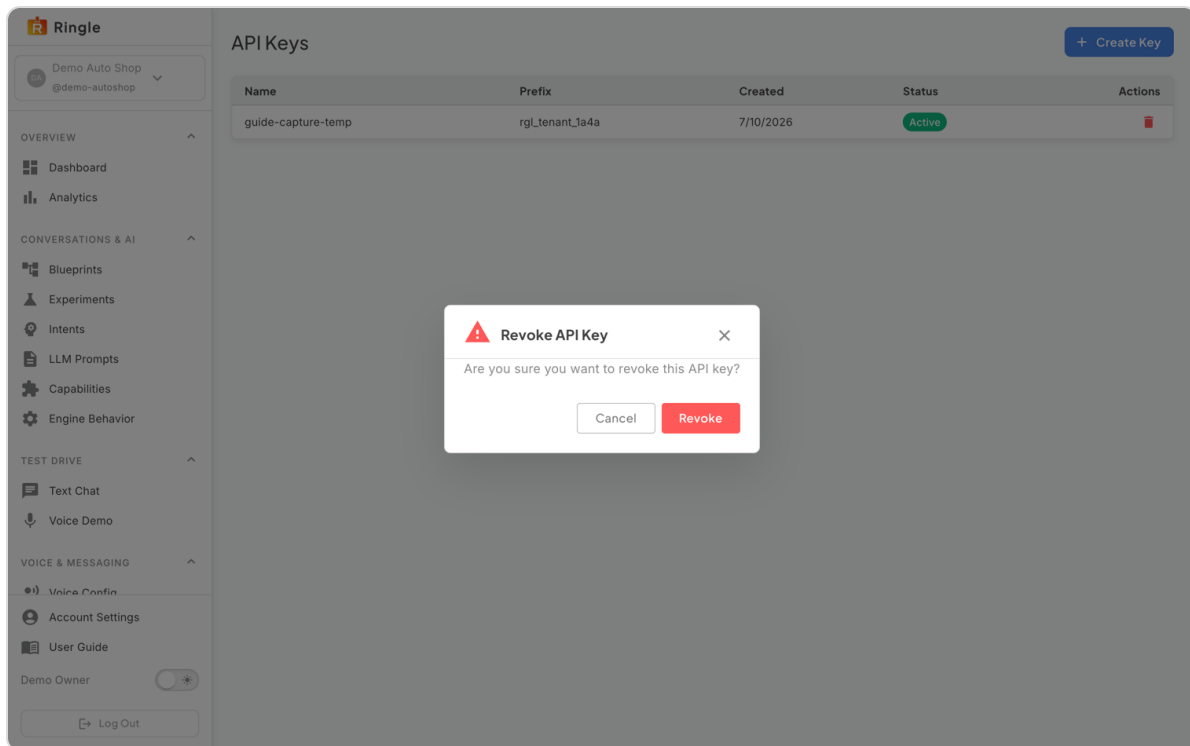
4 Step 4



⚡ Action: Click Create. Copy the key immediately using the copy button. Store it somewhere safe. Then click Close.

✓ What you should see: The dialog swaps to a one-time reveal: a warning that the key will not be shown again and the full secret starting with `rgl_tenant_`. Once you close this dialog, the secret is gone for good. The list only ever shows the prefix. (The key visible in this capture was created for this guide and revoked in the same session.)

5 Step 5



⚡ Action: Click the red revoke icon on the row of the key you want to retire.

✓ What you should see: A Revoke API Key confirmation dialog appears. It asks "Are you sure you want to revoke this API key?" and has Cancel and a red Revoke button. Revocation is immediate and permanent. There is no un-revoke.

6 Step 6

 Ringle

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@demo-autoshop

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API Keys

+ Create Key

Name	Prefix	Created	Status	Actions
guide-capture-temp	rgl_tenant_1a4a	7/10/2026	Revoked	

Action: Click Revoke to confirm.

✓ **What you should see:** The dialog closes and the key stops authenticating immediately. The Status column updates to a red Revoked chip and the revoke action drops off the row. The key shown revoked here is the guide-capture-temp key created in step 4.

7 Step 7

The screenshot shows the Ringle application interface. On the left is a sidebar with a navigation menu. Under the 'CONVERSATIONS & AI' section, 'Payments' is highlighted. The main area is titled 'Payment Links' and contains two cards. The 'Create Payment Link' card has three input fields: 'Amount', 'Description', and 'Customer Email'. Below these is a 'Create Link' button, which is currently disabled (greyed out). The 'Check Payment Status' card has a single input field labeled 'Payment Link ID'.

⚡ Action: Click Payments in the sidebar.

✓ What you should see: The Payment Links page has two cards. Create Payment Link takes an amount, an optional description, and a customer email, and returns a shareable payment URL. Create Link stays disabled until an amount is entered. Check Payment Status looks up a single link by its ID and shows its status and amount. There is no browsable history of past links on this page.

Troubleshooting

- You lost an API key secret: it cannot be recovered. Revoke the old key and create a new one.
- A revoked key still authenticates: it should not. Revocation is immediate and permanent; the Status chip flips to Revoked and the key is rejected on the next

request. If a revoked key still works, contact support.

- Create is disabled in the key dialog: enter a key name first.
- A payment link cannot be created: the amount field is required and must be a number. Check that the tenant's payment provider is configured before relying on the generated URL.

Notes

- Routes: `/settings/tenant` , `/settings/api-keys` , and `/settings/payments` , sidebar items "Tenant Profile", "API Keys", and "Payments" under Account & Access, all gated by the `tenants.settings.manage` permission. Source: `pages/settings/TenantProfilePage.jsx` , `pages/settings/TenantApiKeysPage.jsx` , and `pages/settings/PaymentLinksPage.jsx` .
- Tenant API keys authenticate REST calls with the `X-API-Key` header and are stored hashed; the UI keeps only the prefix for identification.
- The API key whose secret appears in the step 4 capture (`guide-capture-temp` , prefix `rgl_tenant_1a4a`) was created solely for this guide and was revoked in the same session; the secret shown is dead.
- Captures were taken in the Demo Auto Shop tenant, which has no external providers or payment history configured. The tenant profile was not saved and no payment links were created.