

Copilot Settings page in SimboConnect

Purpose: This article explains what you see on the Copilot Settings page in the Phone Copilot admin panel and what each field or button does.

Where to find this

1. Sign in to the Phone Copilot admin panel.
2. Select **Admin** on the top bar.
3. In the left menu, open **Copilot Settings**.

What you see

- **Select Organization.** Choose the organization you want to manage.
- **Copilot Number.** Read only. This is the phone number used by your Copilot.
- **Label.** Editable. A friendly name that helps your team recognize this Copilot.
- **Language.** Read only. The current language configured for this Copilot.
- **Default Greeting.** Editable. The message callers hear when there is no temporary override in effect.
- **Edit.** Enables editing of the editable fields in this section.
- **Add Holiday or Temporary Greeting Override.** Opens a form to create a time bound greeting that takes priority over the default greeting during the selected window.
- **Holiday or Temporary Greeting Override panel.** Contains:
 - **From** date and time.
 - **To** date and time.
 - **Greeting** text area.
 - **Cancel** and **Save**.

How it works

- The **Default Greeting** plays for all calls unless a **Holiday or Temporary Greeting Override** is active.
- When an override is active between the **From** and **To** times, callers hear the override greeting first.
- When the override window ends, the system returns to the **Default Greeting** automatically.

Tips and good practices

- Keep the **Label** short and meaningful, for example “Main Clinic Line”.
 - Review the **Language** and **Copilot Number** before you start, so you edit the correct Copilot.
 - Keep messages clear and under 20 to 30 seconds so callers stay engaged.
 - Test after every change by placing a quick test call.
 - Record change dates in your internal notes so your whole team stays aligned.
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Revision #4

Created 17 September 2025 12:12:12 by Admin

Updated 25 September 2025 19:25:25 by Admin