

Selecting Specific Organization Settings across the Admin Panel

Purpose: Explain how the Select Organization control works across all Admin sub-menus in Phone Copilot, who can see it, and what an organization means in this context.

What an “Organization” Means

In Phone Copilot, an organization can be any of the following, depending on how your account is set up:

- A different legal organization
- A different location or site
- A different department or service line

Admins can use the same Admin screens to view or change settings separately for each organization, site, or department.

Who Sees Select Organization

- The Select Organization control is available only to users who have access to more than one organization, location, site, or department.
- If you have access to only one, the control may not appear.

Where You Will See It

The Select Organization control appears near the top of Admin pages across sub-menus, for example:

- Organization Settings
- Copilot Settings, including Message Templates
- On-call Schedule Management sections

What It Does

Changing the selection changes the context of the page. You will view and modify settings for the chosen organization only. Items like templates, schedules, and other Admin settings are specific to that selection.

How To Use It

1. Sign in to Phone Copilot.
2. Open **Admin** from the top navigation.
3. Locate **Select Organization** near the top of the page.
4. Open the dropdown and choose the organization, site, or department you want to manage.
5. Review or update settings in the current sub-menu.
6. Repeat the selection steps when you need to switch to a different organization.

How To Enable Multiple Locations/Org Access

If you have an admin in your team who has access to all orgs, please ask them to edit your user access with that. If not, please contact your account manager or send email to support-connect@simbo.ai.

Result

You manage each organization, site, or department independently from the same Admin screens, with changes applied only to the selected context.

Tips and good practices

- Confirm the selected organization before creating, editing, or deleting any item.
- Save your changes before switching organizations to avoid losing unsaved work.
- Use consistent naming across organizations. For example, prefix template headings with a short site or department code to make search easier.
- If you cannot find an item, switch the organization and search again.
- Limit access to only the organizations a user needs. This reduces errors and keeps lists shorter.

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