Add a New Dashboard User - Admin Panel

Purpose

Create a new SimboConnect dashboard login, and optionally add the user as an On Call Provider.

Where to find this

Admin tab → **Dashboard Logins** → **Add New**.

Prerequisites

- You must have Admin permissions in Phone Copilot.
- You must know the user’s email address. Mobile number is optional.

Steps

1. In **User Type**, choose the role for this user, for example **Admin**, **Frontdesk User**, or **Staff**.
2. In **Select Organization**, pick the organization this user belongs to.
3. Enter the user **Email**.
4. (Optional) Check **Also add as an On Call Provider** if you want this user added to On Call Providers.
5. Enter **Mobile** if you have it. The example format is **+1-XXX-XXX-XXXX**.
6. Click **Submit** to create the user.

Result

The new user appears in the **Dashboard User List** for the chosen organization.

Tips and Good practices

- Use real, unique email addresses to avoid login conflicts.
- Choose the correct **User Type** based on job function. Upgrade later only if needed.
- Add the mobile number to support notifications and password help.

Revision #1
Created 19 September 2025 19:51:25 by Admin
Updated 19 September 2025 19:51:38 by Admin