

SWITCHBOARD

User Guide

One Dashboard. All Your Clients. Zero Login Switching.

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support@theswitchboardai.com · theswitchboardai.org

Connecting Your GHL Account

Switchboard connects to your GoHighLevel agency account using OAuth — a secure authorization method that never exposes your GHL password. Setup takes less than 2 minutes.

1 Create your Switchboard account

Go to theswitchboardai.org and click Start Free Trial. Enter your name and email to create your account.

2 Authorize the GHL connection

You'll be redirected to GoHighLevel to authorize Switchboard. Click Allow to grant access. We never see your GHL password.

3 Your clients sync automatically

Once connected, Switchboard pulls in all your GHL sub-accounts. You'll see them listed in the sidebar immediately.

4 Start exploring

Click any client in the sidebar to view their contacts, pipeline, conversations, and calendar — all without leaving Switchboard.

■ **Tip:** Agency-level access required. Switchboard works with GHL agency accounts. If you only have a sub-account login, you'll need agency-level credentials to connect.

Your Command Center

The Switchboard dashboard gives you a bird's eye view of your entire agency. Here's what you'll find:

■ Agency Overview

Total clients, combined pipeline value, active conversations, and upcoming appointments across all accounts.

■ Client List

All your GHL sub-accounts in the sidebar. Click any client to instantly switch context.

■ Conversations

View all conversations for any client. Stay on top of every lead without switching logins.

■ Calendar

See upcoming appointments for any client. Never miss a booking or follow-up.

■ Pipeline

Track deals, pipeline value, and opportunity stages for every client from one unified view.

■ Reports

Agency-wide performance reporting. (Pro & Agency plans.)

■ **Tip:** Quick switching: Use the client sidebar to jump between accounts instantly. Your last viewed client is remembered when you return.

03 — CLIENTS

Managing Client Accounts

Every GHL sub-account connected to your agency appears in Switchboard automatically. Here's how to get the most out of each client view.

1 Select a client

Click any client name in the left sidebar. Their data loads instantly — no additional login required.

2 Navigate their data

Use the navigation tabs to switch between Contacts, Conversations, Pipeline, and Calendar for that client.

3 Search and filter

Use the search bar within each view to find specific contacts, conversations, or deals quickly.

4 Switch to the next client

Click another client in the sidebar at any time. Switchboard switches context immediately.

■ **Tip:** Data is always fresh. Switchboard syncs with GHL's API automatically. Changes made inside GHL reflect in Switchboard on your next load.

Inviting Your Team

Give your team members access to Switchboard with role-based permissions. Each role controls exactly what a team member can see and do.

1 Go to Team Settings

Click your profile icon in the top right, then select Team Management.

2 Invite a team member

Click Invite Member, enter their email address, and select their role.

3 They accept the invite

Your team member receives an email invitation. Once accepted, they'll have access based on their assigned role.

Role Permissions

Permission	Admin	Manager	View Only
View all client data	✓	✓	✓
Manage team members	✓	—	—
Access billing settings	✓	—	—
View agency reports	✓	✓	—
Switch between clients	✓	✓	✓

■ **Tip:** Client limits apply by plan. Starter: 5 clients. Pro: 15 clients. Agency: 45 clients (\$10/additional).

Staying in the Loop

Switchboard sends notifications for important updates — new feature releases, sync alerts, and anything that needs your attention.

■ In-App Notifications

See alerts in the notification bell at the top of your dashboard. New notifications show a badge count.

■■ Notification Settings

Control which notifications you receive from your account settings. Turn off categories you don't need.

06 — BILLING & PLANS

Managing Your Subscription

Switchboard offers three plans based on the number of client sub-accounts you manage. You can change your plan at any time.

■ Starter — \$147/mo

Up to 5 client accounts. 1 team member. All core views. Email support.

■ Pro — \$247/mo

Up to 15 client accounts. 5 team members. Agency reports. Priority support.

■ Agency — \$397/mo

Up to 45 client accounts. Unlimited team members. \$10/additional client.

■ Free Trial

All plans include a 7-day free trial. No credit card required to start.



To upgrade or downgrade

Go to Account Settings → Billing and select your new plan. Changes take effect on your next billing cycle.



To cancel

Go to Account Settings → Billing → Cancel Subscription. You retain access until the end of your current billing period.

■ **Tip:** Questions about billing? Email support@theswitchboardai.com and we'll get back to you within 1 business day.

Common Questions

Do I need to give Switchboard my GHL password?

No. Switchboard uses OAuth — you authorize access directly through GoHighLevel. We never see or store your GHL password.

How often does my data sync?

Switchboard syncs with GHL's API automatically. Data refreshes when you load a client view, so you're always seeing up-to-date information.

Can I manage clients I add to GHL later?

Yes. Any new sub-accounts you add to your GHL agency will automatically appear in Switchboard on your next sync.

Is my client data secure?

Yes. All data is encrypted in transit and at rest. We only access what GHL's API exposes through your authorized connection and never share your data with third parties.

What if I need help?

Email us at support@theswitchboardai.com. Pro and Agency plan customers receive priority support with faster response times.