Switch Workspaces or Websites

Workspace Management · https://plovercrm.com/docs/switch-workspaces-or-websites/

Use the workspace selector to move between authorized PloverCRM workspaces or connected websites. Switching changes the records, settings, reminders, and dashboard information shown in the PloverCRM Web Dashboard; it does not merge or move data between workspaces.

The names of buttons and sections can vary with your PloverCRM plan, permissions, connected services, and current version. When a label differs, use the matching label displayed in your account.

Before you begin

- Sign in to the **PloverCRM Web Dashboard**.
- Select the workspace or connected website where you intend to work.
- Confirm that your role allows the screen and action described here.
- Prepare approved or fictional test data when the workflow changes records, sends messages, imports data, or triggers an automation.
- Finish or cancel unsaved edits before switching workspaces, refreshing, or leaving the page.

Steps

1. Finish or cancel any unsaved edit in the workspace you are currently using.
2. Open the workspace or website selector in the PloverCRM Web Dashboard header.
3. Review each available workspace name and its connected website address.
4. Select the authorized workspace you want to use.
5. Wait for PloverCRM to load the new workspace and its dashboard data.
6. Check the workspace name, website address, connection status, and user context in the header.
7. Open **All Leads** or another safe view and confirm that the records belong to the selected workspace.

8. Continue working only after the workspace identity is correct.

What to verify

After the final step, confirm:

- The workspace name and connected website still match the intended destination.
- The status, record, filter, setting, or result reflects the change you made.
- No unrelated lead, teammate, connection, message, or automation was changed.
- Any export, notification, file, or external action follows your organization's privacy and retention policy.

PloverCRM should display a confirmation, updated status, or refreshed record. If the workflow is asynchronous, use its progress or log view instead of submitting the same request again.

Troubleshooting

- If the screen or control is missing, confirm the workspace and ask an administrator to review your role.
- If results are empty or stale, clear filters, refresh once, and check workspace connection status.
- If a value is rejected, read the field-level message and use the required format.
- If an operation is processing, wait for its status or log entry before trying again.
- If the result is unexpected, stop before making another change and record the exact non-sensitive message, approximate time, browser, and reproduction steps.

> **Security and privacy:** Never include passwords, one-time codes, API keys, connection tokens, private URLs, payment details, or identifiable customer data in screenshots, exports, notes, or support requests. Use approved support channels and redact diagnostic material before sharing it.