

Navigate Organizations

Last Modified on 07/07/2023 12:13 pm EDT

Read on to learn how to go to an organization in the Management Portal.

Overview

Before you perform most tasks, if you manage multiple organizations, you will need to go to the correct organization before beginning.

Before you start

- Best practice is to set policies at the top-most level where they apply, as policies set at the toplevel are inherited by the organizations below.
- You can only go to organizations you have access to.
- If you only have access to one organization, you won't need to use this instruction.

Go to organization

- 1. Click the organization icon 🛔 on the left side of the header bar.
- 2. Select sub-organizations to reveal their sub-organizations until you find the desired suborganization.

All Sub-Organization	Choose Sub-Organizations							
Clark	ADC Bank						MS Opt-	
itock Brokerage	Stock Brokerage Home Loan Wealth Mgmt Non-Recorded					*		
forme Loan	wealth Mgmt Recorded							
Vealth Mgmt Non-Recorded							rded	
Nearth Mgmt Recorded						Canoel		
		SMS Operation	Reduction *	SMS Opein N	Reduction	SMS Opela M	Reduction	
		Orestelhows	ub-Organization)					

3. Click Apply.