Getting Started with Client Assignment

*Who this guide is for.*This guide is for the CBM**Client Assignment**team, and it assumes you've already read the CRM Introduction — so you know what Contacts, Companies, Engagements, and Sessions are, how to sign in and navigate, and how the records connect. It picks up from there and walks you through what your team does.

*What your team does.*Your team makes sure every client is matched with the right mentor. In practice that means reviewing new**Engagements**as they come in, checking that the records are correct, and assigning each one to a capable mentor. You also handle engagements that come back to be re-matched — ones a mentor has**declined**, or that have gone**dormant**. The sections that follow take these in turn.

*Where engagements come from.*New engagements arrive in the CRM from the**client intake form** — the form a prospective client completes to request mentoring. Each submission creates a new Engagement, with the client's information, for your team to review and assign; you don't create these by hand.

*Signing in.*You reach the CRM the same way as any user — see "Signing In" in the Introduction. If you're ever unable to sign in, or can't see something you think you need, contact**Sharon Rose** [contact method to be added].

*The rule that runs through everything — mentor and user together.*The single most important habit in this role: whenever you assign an engagement, you set**two**fields — the**mentor**(the person who will do the mentoring) and the matching**user-assigned**field (their login account). They go together. As the Introduction explained, what a person can see is governed by their**User account**, not by being named as the mentor — so if you set the mentor but not the matching user, that mentor won't be able to open their own engagement. Every assignment in this guide sets both.

Revision #1
Created 2026-06-17 22:41:18 UTC by Admin
Updated 2026-06-17 22:42:02 UTC by Admin