

The Lay of the Land

When you log in, you'll see the CBM CRM's main interface. A handful of elements stay with you everywhere you go, and getting familiar with them is most of what it takes to feel at home. One thing to know up front: the exact set of menu items you see is tailored to your role, so your screen may not look identical to a colleague's — that's intentional, and Section 6 explains why. (The screenshots in this section show CBM's actual setup.)

The left-hand menu. Down the left side of the screen is a menu listing the main areas of the system — the kinds of records you work with, such as **Contacts**, **Companies**, **Mentors**, **Engagements**, and **Sessions**. Select any item to open that area. A home link returns you to your home page from anywhere.

Search. The search box in the top bar finds records anywhere in the system by name — a person, a company, a mentoring record — and is the fastest way to jump straight to something. Section 5 covers searching in more detail.

The screenshot displays the CBM CRM interface. On the left, a vertical menu is highlighted with a red box, listing various system areas: CRM, Companies, Contacts, Mentors, Clients, Partners, Sponsors, Contributions, Engagements (selected), Sessions, Events, Reports, Resources, and Event Registrations. Below this are sections for Activities, Knowledge Base, Emails, Meetings, Calls, Tasks, Calendar, Support, and Cases. The main content area is titled 'Engagements' and features a search bar at the top right, also highlighted with a red box. Below the search bar is a '+ Create Engagement' button. The main area contains a table of engagement records with columns for Name, Engagement Status, Meeting Code, Last Session Date, Next Session Date/Time, Total Sessions, and Close Date. The table lists 18 records, with the first 17 having a status of 'Submitted' and the last one being 'Active'.

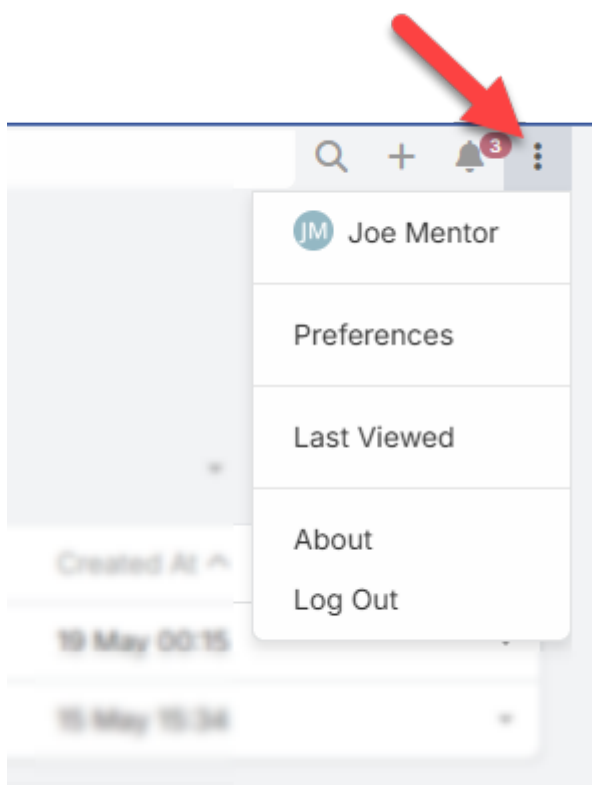
Name	Engagement Status	Meeting Code...	Last Session Date	Next Session Date/Time	Total Sessions	Close Date
ZZTEST-SMOKE RebuildCheck0608 — Intake 2...	Submitted					
Patrick Smith — Intake 2026-06-05	Submitted					
Andy Axle — Intake 2026-06-05	Submitted					
NoCompany TestUser — Intake 2026-06-05	Submitted					
ZZTEST-VERIFY FormFixed — Intake 2026-06-...	Submitted					
tonya hegler — Intake 2026-06-03	Assigned	Weekly				
Tom Cook — Intake 2026-06-03	Pending Acceptance					
Sam Smith — Intake 2026-06-02	Submitted					
ANITA KHAYAT — Intake 2026-06-02	Submitted					
April Pfenninger — Intake 2026-06-02	Submitted					
Clayton Blahovec — Intake 2026-06-02	Pending Acceptance					
Greg LaFrance — Intake 2026-06-01	Submitted					
Christopher Westfall — Intake 2026-06-01	Submitted					
Calvin Boss — Intake 2026-06-01	Submitted					
Jonathan Medina — Intake 2026-06-01	Submitted					
Kevin Ra — Intake 2026-06-01	Submitted					
Brian Sapp — Intake 2026-05-28	Active	Weekly				
Agape W8 Loss 2026-05-15	Active	Weekly		Today 12:00	11	

Your home page. This is the first thing you see after signing in. It's made up of panels — called **dashlets** — that give you an at-a-glance summary, such as items assigned to you, recent activity, and things coming up. What appears here depends on your role and can be personalized later. Initially, it will not have much information, and you should navigate to your Engagements, or Mentors tab.

Notifications. A bell icon in the top bar alerts you to things that involve you — for example, when a record is assigned to you or a colleague mentions you. A number on the bell means something new is waiting; select it to see what.

Your account menu. At the far top-right, the account menu — the three-dot icon — opens your account options: it shows your name, your personal preferences, and the option to log out. You won't need anything in here to get started.

The activity stream. Across the system you'll encounter the **Stream** — a running, dated feed of what's happened, newest first. There is a system-wide Stream, and, as you'll see in Section 5, each individual record has its own. Think of it as the system's running narrative of updates.



he top bar: search, create (+), notifications (with a count badge), and the account menu — shown open, with your name, Preferences, and Log Out.

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