Your Role and What You Can See

The system tailors itself to you. The CBM CRM deliberately shows different things to different people. The areas in your **left-hand menu**, the records that appear in your lists, and even some of the details on a record are all shaped by your **role** and your **User account**. Two colleagues can sign in side by side and see genuinely different screens — that's the system working as intended, not a glitch.

Why you might not see everything. Much of what the CRM holds is sensitive — personal details, client information, mentoring notes. Access is granted deliberately: you see what your role needs, and not what it doesn't. If you can't see a particular record, area, or field, it's almost always because your role isn't set up to need it, not because anything is broken. (As Section 4.4 noted, access follows your User account — which is also why you might occasionally find your name on a record you can't open.)

What this means day to day. Treat your view as the correct one for your role. When this guide or a colleague mentions an area or feature you don't see, it most likely belongs to a different role; your own role guide will cover exactly what's yours to use.

If you think you're missing access you need. Sometimes a role genuinely needs access it doesn't yet have. If you believe you should be able to see or do something and can't, don't work around it — contact **Sharon Rose**, who can check whether your access is set correctly.

In short. What you see is tailored to your role and governed by your User account. Seeing less than a colleague is normal and intentional. If you think you're missing access you actually need, ask Sharon rather than working around it.

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