How Email Works

Cleveland Business Mentors application suite - current as of July 21, 2026

Every email the system sends or receives goes through CBM's own Google Workspace (Gmail). The application never runs its own mail server, so deliverability, security, and retention are Google's - and every message, inbound or outbound, also exists in a real Gmail mailbox that staff can open directly if ever needed.

There are **two sending identities**, and knowing which one applies is the key to understanding the whole system:

Identity	Used for	Who sees replies
The mentor's own mailbox (e.g. jane.smith@cbmentors.org)	Relationship mail: mentors writing to their clients, partners, and funders	The mentor, in their own mailbox and in the app
"Cleveland Business Mentors" (info@cbmentors.org)	Organizational mail: responses to website inquiries, staff notices, and the CRM's own automated messages	The Marketing Admin team, in the shared queue and the info@ inbox

The rule of thumb: **mail from a person comes from that person; mail from the organization comes from Cleveland Business Mentors.**

1. The public website forms

The five intake forms (client intake, volunteer, request for information, partner, sponsor) create records in the CRM when submitted. They do **not** send the submitter a confirmation email - a deliberate choice. When a response is warranted, staff send it personally from Submission Admin (below), so the first email a prospect receives from CBM is a real answer, not an autoresponder.

2. Submission Admin - the organizational inbox

Submission Admin is where form submissions and inbound email meet.

- **Inbound:** the system checks the info@cbmentors.org inbox every five minutes. Each new email thread appears in the queue as a held item. Staff either **Approve** it (creating the same CRM records a website information request would) or **Discard** it (spam leaves no trace in the CRM). Automated bounce notices and threads CBM itself started are filtered out automatically.
- **Outbound:** replies from Submission Admin are sent as **Cleveland Business Mentors**, with no personal signature. Because each conversation is anchored to its submission, every admin sees the same complete thread - who replied, what was said, and when - regardless of who handled it.
- **Follow-up at a glance:** each open item shows whether CBM owes a reply ("reply owed") or is waiting on the submitter. If a reply could not be delivered - a mistyped address, for example - the item is flagged in red ("delivery failed") and the conversation shows the mail system's reason. A failed delivery is never silent.

3. Mentor tools - Client, Partner, and Funder Management

Mail between a mentor and the people they serve is personal, and the system keeps it that way.

- **Sending:** every compose window in these tools - replying in a record's Communications tab, or clicking any email address in the app - sends from the **mentor's own** @cbmentors.org mailbox, with their personal signature added automatically.
- **Receiving:** the system continuously reads each mentor's CBM mailbox and files correspondence with their clients, partners, and funders onto the matching record in the CRM - cleaned of signatures and quoted reply chains, with the original always one click away in Gmail. Only correspondence with people on the mentor's *active* records is captured; internal staff-to-staff mail and marketing/automated mail are excluded.
- **My Email** gives each mentor a single inbox view of these conversations across every record they manage, with unread and awaiting-reply markers.
- Every message sent from the app is also recorded in the CRM on the recipient's contact history, so the CRM remains the complete record.

4. Mentor-to-mentor email

When one mentor emails another - a co-mentor, or a colleague - the message always goes out from **the sending mentor's own** @cbmentors.org mailbox, never from Cleveland Business Mentors. Peer discussion is personal mail.

What differs is **whether the CRM keeps a copy**, and that depends on where the message is written:

- **Written from a client record** (the Communications tab of an engagement, partner, or funder): the message is filed on that record, exactly like a message to the client. Writing from the record is the deliberate signal that the discussion belongs to it - for example, co-mentors coordinating about their shared client.
- **Written anywhere else** (Gmail directly, or a compose window not tied to a record): internal mail between @cbmentors.org addresses is **not** captured into the CRM at all. Private peer conversation stays in Gmail.

The rule of thumb for mentors: *if the discussion is about a client and should be part of the client's history, write it from the client's record; otherwise use Gmail and it stays between you.*

5. Staff administration tools - Client Administration and Mentor Administration

Notices sent from the staff tools - for example, the assignment notice a mentor receives when a new client is assigned - go out as **Cleveland Business Mentors**. These are organizational messages, not personal correspondence. Replies to them arrive in the info@ inbox, which the Marketing Admin team monitors.

6. Meeting invitations

When a mentor schedules a session, the calendar invitation comes from **Google Calendar** on the mentor's behalf - it is a calendar event, not an app email. Clients are invited at their own addresses; CBM members are always invited at their @cbmentors.org address, never a personal one, so nobody receives a duplicate copy of their own meeting.

7. The CRM's own automated email

Messages EspoCRM generates itself - the welcome email when a new mentor login is created, password-reset links - are sent from **info@cbmentors.org** ("Cleveland Business Mentors"). The old espo@ address has been retired from outgoing mail.

8. System monitoring

Operational alerts (delivery backlogs, integration problems) go to **admin@cbmentors.org** and come from admin@ - internal plumbing, deliberately kept off the customer-facing info@ identity.

Who sees what

- **A mentor** sees the email conversations on their own records, and their My Email inbox. They never see another mentor's correspondence or the organizational queue.
- **The Marketing Admin team** works the Submission Admin queue and watches the info@ inbox. They see every organizational conversation, but not mentors' relationship mail.
- **Everything sent from the app is also in Gmail** - a mentor's sends in their own Sent folder, the organization's in the info@ account - so nothing depends on the application to be readable.

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