Getting Oriented

What this guide covers, the CBM CRM at a glance, and how to sign in as an administrator.

About This Guide & the CBM CRM Setup

Who this guide is for

This guide is for the **CBM CRM administrator** — the staff member(s) responsible for keeping the Cleveland Business Mentors CRM running smoothly day to day: adding and removing users, adjusting settings, importing data, and handling the occasional problem.

It assumes you're comfortable using web applications, but **not** that you're a server or database expert. Where a task is genuinely technical (server upgrades, recovery), this guide summarizes it and points you to the right person or runbook rather than asking you to do it yourself.

If you're a **mentor** or a member of the **Client Administration** or **Mentor Administration** teams, the guides on the other shelves are for you — this one is specifically about *administering* the system.

What the CBM CRM is

The CRM is the central system that holds CBM's people and activity — mentors, clients, the engagements that pair them, the sessions they hold, and the supporting records around them. As administrator, you don't change *what* the CRM tracks day to day; you keep the system healthy and help users get their work done.

Two environments: Production and Sandbox

There are **two** copies of the CRM, and knowing which is which is the single most important thing in this guide:

	Address	What it is

Production	`crm.clevelandbusinessmentors.org`	The **real, live** system. Everyone's actual work and real data live here.
Sandbox	`crm-test.clevelandbusinessmentors.org`	A **safe copy** for trying things out. Nothing here affects real data.

> **The golden rule:** when you're about to make a change that isn't routine — a settings change, a configuration tweak, a bulk data operation — **try it in the Sandbox first**, confirm it does what you expect, *then* do it in Production.
>
> Chapter 3 — Configuration & Customization covers this sandbox-first workflow in detail.

How the system is maintained

A few things are handled *outside* the CRM's own screens, so you don't have to:

- **Configuration** (custom fields, layouts, new record types) is applied through CBM's implementation process and tooling, not hand-edited in Production. See Chapter 3 — Configuration & Customization.
- **The server, hosting, backups, security certificates, and software upgrades** are managed at the infrastructure level. You don't log into servers; Chapter 6 — Operations & Maintenance explains what's automated and who handles the rest.

What's in this guide

- **Chapter 2 — Users, Roles & Access:** add and remove users; manage who can see and do what.
- **Chapter 3 — Configuration & Customization:** settings, the navigation menu, and the sandbox-first change process.
- **Chapter 4 — Managing Data:** importing, exporting, duplicates, and cleanup.
- **Chapter 5 — Integrations:** Google, email, the website, and this documentation site.
- **Chapter 6 — Operations & Maintenance:** backups, updates, and routine upkeep.
- **Chapter 7 — Troubleshooting, Recovery & Reference:** fixing problems, recovery options, and where everything lives.

> **When in doubt, slow down.** Most administrative actions are easy to reverse, but a few (bulk deletes, resets) are not. If a task in this guide carries a warning, take it seriously — and if you're unsure, see Getting Help and Next Steps at the end of the guide.

Signing In & the Administration Panel

Signing in as an administrator

1. Open the CRM in your browser:
   - **Production:** `https://crm.clevelandbusinessmentors.org`
   - **Sandbox:** `https://crm-test.clevelandbusinessmentors.org`
2. Enter your **administrator** username and password.
3. You'll land on a dashboard like any user — your *administrator* access simply adds an extra **Administration** area.

   > Administrator accounts can change settings and see everyone's data. Keep your credentials secure, never share the admin login, and give each person their own account (see Chapter 2 — Users, Roles & Access) instead of sharing one.

Opening the Administration panel

Click your **avatar / initials in the top-right corner**, then choose **Administration**. (Only users with admin access see this option.)

The Administration page is a grid of labeled sections. You won't need most of them often — here are the ones this guide uses, and where each is covered.

The areas you'll use

Users and access

- **Users** — the people who can sign in. *(Chapter 2)*
- **Teams** — groups used to organize people and control visibility. *(Chapter 2)*

- **Roles** — what a user or team is allowed to see and do. *(Chapter 2)*

System and customization

- **Settings** — system-wide options. *(Chapter 3)*
- **User Interface** — the navigation menu / tab list, including the **Documentation** tab. *(Chapter 3)*
- **Entity Manager / Layout Manager** — the structure of records and forms. **Changed through the sandbox-first process, not casually here.** *(Chapter 3)*
- **Label Manager** — the wording shown around the interface. *(Chapter 3)*

Data

- **Import** — bring records in from a spreadsheet. *(Chapter 4)*

Email

- **Outbound Emails, Email Accounts, Email Templates** — how the CRM sends mail. *(Chapter 5)*

Maintenance

- **Scheduled Jobs, Jobs, Auth Tokens** — background tasks and sessions; mostly informational. *(Chapter 6 – Chapter 7)*

> **A note on the powerful areas:** *Entity Manager*, *Layout Manager*, and the bulk data tools can change the CRM for everyone at once. Treat them as read-only until you've read the chapter that covers them — and remember the golden rule: **Sandbox first.**

Finding your way back

Wherever you are in Administration, the **CBM logo (top-left)** returns you to the main CRM, and the **avatar menu → Administration** brings you back here.