Integrations

Google, email, the website, and this documentation site.

- Google, Email & Website Integrations
- The Documentation Site

Google, Email & Website Integrations

> Some specifics below depend on how CBM's integrations are configured. Where you see "*as configured,*" confirm the detail for your setup (or ask — see Getting Help and Next Steps).

Configuring System Email- (Allows sending new user email, forgot password and system notifications.)

Google (Gmail, Calendar, Contacts)

The CRM connects to Google so that email, calendar, and/or contacts work together *(as configured)*. The most common admin task is **re-authorizing** when the connection drops — typically after a password change or when a sign-in token expires.

- Administration → **Integrations → Google** for the system connection; individual Gmail/Calendar links live under each user's preferences.
- If users report email or calendar not syncing, check the integration status and **re-authorize** (sign in and approve again with the CBM Google account).

> If re-authorizing keeps failing, the underlying Google API credentials may need attention — that's a technical step; see Getting Help and Next Steps.

Outbound email

- Administration → **Outbound Emails** controls how the CRM sends mail.
- Quick check: trigger a password reset or notification and confirm it arrives.

> If the CRM stops sending email (resets, notifications), outbound email settings or the Google connection are the usual causes.

Inbound email

- If configured, the CRM can capture incoming email under **Email Accounts / Group Email Accounts**.

The website

- CBM's public website connects to the CRM *(as configured — e.g. intake forms creating records)*. If website-submitted data stops arriving, that integration and its **API user** are where to look.

The documentation site

- The **Documentation** tab links to this site — see The Documentation Site.

The Documentation Site

What this site is

The documentation you're reading lives on a separate **documentation site** at `docs.clevelandbusinessmentors.org`, independent of the CRM. It's organized as **Shelves → Books → Chapters → Pages**, grouped by audience:

- **Start Here** — CRM Introduction Guide (for everyone)
- **Mentor Documentation** — Mentor Guide
- **Staff & Administration** — Client Administration Team Guide, Mentor Administration Team Guide
- **System Administration** — this guide

The Documentation tab

Both the Production and Sandbox CRMs have a **Documentation** tab in the sidebar that opens this site in a new browser tab. See System Settings & the Navigation Menu for how that tab is set up.

Who can read it

The site is **publicly readable** — no login needed — so anyone with the link can reach the guides. **Editing** requires a login.

Editing content

- Sign in to edit. Pages can be written in a visual editor or Markdown, and every page keeps a **full revision history**, so any change is reviewable and reversible.
- Keep the guides aligned with the CRM: when a screen or process changes, update the matching page.

How it's hosted & maintained

- The site runs on its own small server, separate from the CRM, with automatic HTTPS.
- Full deploy and maintenance details live in the CBM repository runbook `infrastructure/CBM-Documentation-Site.md`, summarized in [Chapter 6 — Operations & Maintenance].