

Troubleshooting, Recovery & Reference

Fixing problems, recovery options, and a quick reference of where everything lives.

- [Troubleshooting & Recovery](#)
- [Environments & Where Things Live](#)
- [Getting Help and Next Steps](#)

Troubleshooting & Recovery

First steps for any problem

1. **Is it just you?** Try another browser or an incognito window, or ask a second user.
2. **Which environment?** Confirm you're in Production vs. Sandbox.
3. **Recent change?** If the problem began right after a change, that change is the prime suspect — and structural changes should have been Sandbox-tested first.

Common problems

Symptom	Likely cause / first fix
A user can't sign in	Account inactive or wrong password — check the user and reset it (Managing Users).
Reset / notification emails not arriving	Outbound email or the Google connection — see Chapter 5 — Integrations .
Calendar / Gmail not syncing	Google authorization expired — re-authorize (Google, Email & Website Integrations).
Someone sees too much or too little	Role or team misconfigured — Roles, Teams & Permissions .
Records "missing"	Usually a filter or permission, not deletion — clear filters and check the user's role; if truly deleted, act fast (below).
Certificate warning in the browser	Flag it — see Backups & Updates .
CRM slow or unreachable	May be the server — escalate (below).

If data was deleted or badly changed

Stop making changes. The fix is usually to **restore from backup** — a technical, time-sensitive operation. The sooner you raise it, the more recoverable it is. See [Getting Help and Next Steps](#).

Recovery operations (technical — usually not you)

The deployment tooling can perform powerful recovery actions, listed here just so you know they exist:

- **Admin credential reset** — regain admin access if locked out.
- **Full reset / rebuild** — tears the instance down and rebuilds it. **This destroys data and is only safe with a good, recent backup.**

“ ⚠ These are **destructive, technical operations** run via the CRM Builder tool by whoever maintains the deployment — **not** routine admin tasks. Never run a "full reset" to fix an everyday problem. If you think recovery is needed, **escalate**

When you escalate

Note **exactly** what you did, what you expected, what happened, the **time**, and the **environment**. Technical logs (server and API) are available to whoever maintains the deployment.

Environments & Where Things Live

Environments

Environment	Address	Purpose
Production CRM	<code>crm.clevelandbusinessmentors.org</code>	The live system
Sandbox CRM	<code>crm-test.clevelandbusinessmentors.org</code>	Safe testing copy
Documentation site	<code>docs.clevelandbusinessmentors.org</code>	These guides (public)

Where things live (*pointers — no secrets here*)

Thing	Where
CRM configuration (fields/layouts/record types, as files)	The CBM repository + the CRM Builder tool
Deploy / upgrade / recovery procedures	The CRM Builder tool + CBM repository runbooks
Documentation-site deploy & maintenance	<code>infrastructure/CBM-Documentation-Site.md</code> (CBM repository)
Credentials & connection settings	A secure store (password manager / the deployment tool's secret storage) — never in documentation or spreadsheets
Account & recovery information	The CBM repository's secure account-information area

“ This guide never contains passwords, keys, or secrets — and neither should any page you add. Record *where* a credential lives, never *what* it is.

Key tools & people

- **CRM Builder tool** — provisions, configures, upgrades, and recovers the CRM.
- The CBM implementation team / deployment maintainer — for configuration changes and technical operations (see [Getting Help and Next Steps](#)).

Getting Help and Next Steps

Handle it yourself, or escalate?

Do it yourself

- Adding and deactivating users; password resets
- Settings, Tab List, and dashboard tweaks
- Data imports and cleanup (Sandbox-tested); tidying duplicates

Escalate

- Configuration / structure changes ([Chapter 3](#))
- Server or deployment issues; anything destructive (resets)
- Suspected **data loss**
- Persistent integration failures (email, Google, website)

How to get help

- For **configuration changes and technical / deployment issues**, contact the CBM implementation team / deployment maintainer.
- When you ask for help, include: what you were doing, what you expected, what happened, the **time**, and the **environment** (Production or Sandbox).

“ **To be filled in:** CBM's actual support contact(s) and any ticket/escalation path. Left generic on purpose — provide the names/addresses and they'll be slotted in here.

The other guides

- [CRM Introduction Guide](#) — start here, for everyone
- [Mentor Guide](#) — for mentors

- [Client Administration Team Guide](#) and [Mentor Administration Team Guide](#) — for staff teams
- *(You're in the System Administration guide.)*

Keep this guide current

When the CRM changes, update the matching page here — editing is covered in [The Documentation Site](#). Good documentation is maintained, not written once.