

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.

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