

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.

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