

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](#).

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