

Making Configuration Changes

Two kinds of change

- **Data** — adding records, fixing values, importing. Everyday work; see [Chapter 4 — Managing Data](#).
- **Configuration / structure** — new fields, changed layouts, new record types, dropdown options, validation, relationships. This follows a defined process.

Why configuration is special

The CBM CRM's structure is **defined as versioned configuration files** and applied with CBM's implementation tooling, so the system can be rebuilt or moved reliably and every change is tracked. If you hand-edit structure directly in Production (via Entity Manager or Layout Manager), those changes:

- **aren't recorded** in the configuration source, so they can be lost in a rebuild or upgrade, and
- **drift** between Sandbox and Production.

The sandbox-first process

1. **Describe the change** — what field/layout/record type, on which record, and why.
2. **Make it in the Sandbox first** (via the configuration files / implementation tool) and verify it.
3. **Review** with whoever requested it.
4. **Apply to Production** the same way, once confirmed.

This is the **golden rule** in its most important form. Structural changes affect everyone at once and are the easiest way to break things — never make them straight in Production.

Safe to do in the interface

- Adding and editing **records** (data) — [Chapter 4](#).
- **Settings**, the **Tab List**, **dashboards**, **labels** — [System Settings & the Navigation Menu](#).
- **Users, roles, teams** — [Chapter 2](#).

Goes through the process (don't do casually in Production)

- New or changed **fields**
- New **record types / entities**
- **Dropdown options, validation rules, relationships** between records

Who to involve

Configuration changes are made with the implementation tooling and, where needed, the CBM implementation team. If you're unsure whether something is "just data" or "configuration," **treat it as configuration** and check — see [Getting Help and Next Steps](#).

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