

Routine Maintenance & Monitoring

A simple routine

A short, regular check keeps surprises away.

Weekly-ish

- Confirm **email is sending** (a password reset or notification arrives).
- Confirm **Google / calendar sync** is current, if CBM relies on it.
- Glance at **new users and access**, and deactivate anyone who has left.

Monthly-ish

- Skim for **duplicate or junk records** and tidy up — see [Duplicates, Mass Updates & Cleanup](#).
- Confirm **backups** are running and recent — see [Backups & Updates](#).
- Note any **pending updates** to schedule.

Signs something needs attention

- Users report **can't log in**, **missing records**, or **email not sending**.
- A **certificate warning** on the CRM or docs site.
- The CRM is **slow or unreachable**.

For any of these, go to [Troubleshooting & Recovery](#).

Background jobs

EspoCRM runs scheduled background jobs (notifications, email checks, cleanup) automatically. Administration → **Scheduled Jobs** lists them. If time-based things — reminders, scheduled emails

— stop happening, that's a sign the background runner needs attention; flag it.

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