

Signing In & the Administration Panel

Signing in as an administrator

1. Open the CRM in your browser:
 - **Production:** `https://crm.clevelandbusinessmentors.org`
 - **Sandbox:** `https://crm-test.clevelandbusinessmentors.org`
2. Enter your **administrator** username and password.
3. You'll land on a dashboard like any user — your *administrator* access simply adds an extra **Administration** area.

“ Administrator accounts can change settings and see everyone's data. Keep your credentials secure, never share the admin login, and give each person their own account (see [Chapter 2 — Users, Roles & Access](#)) instead of sharing one.

Opening the Administration panel

Click your **avatar / initials in the top-right corner**, then choose **Administration**. (Only users with admin access see this option.)

The Administration page is a grid of labeled sections. You won't need most of them often — here are the ones this guide uses, and where each is covered.

The areas you'll use

Users and access

- **Users** — the people who can sign in. ([Chapter 2](#))

- **Teams** — groups used to organize people and control visibility. ([Chapter 2](#))
- **Roles** — what a user or team is allowed to see and do. ([Chapter 2](#))

System and customization

- **Settings** — system-wide options. ([Chapter 3](#))
- **User Interface** — the navigation menu / tab list, including the **Documentation** tab. ([Chapter 3](#))
- **Entity Manager / Layout Manager** — the structure of records and forms. **Changed through the sandbox-first process, not casually here.** ([Chapter 3](#))
- **Label Manager** — the wording shown around the interface. ([Chapter 3](#))

Data

- **Import** — bring records in from a spreadsheet. ([Chapter 4](#))

Email

- **Outbound Emails, Email Accounts, Email Templates** — how the CRM sends mail. ([Chapter 5](#))

Maintenance

- **Scheduled Jobs, Jobs, Auth Tokens** — background tasks and sessions; mostly informational. ([Chapter 6](#) - [Chapter 7](#))

“ **A note on the powerful areas:** *Entity Manager, Layout Manager*, and the bulk data tools can change the CRM for everyone at once. Treat them as read-only until you've read the chapter that covers them — and remember the golden rule: **Sandbox first.** ”

Finding your way back

Wherever you are in Administration, the **CBM logo (top-left)** returns you to the main CRM, and the **avatar menu → Administration** brings you back here.

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