

Declining an Application

If after a full review your team determines that a candidate is not the right fit for CBM's mentoring program, you decline the application. A declined record is retained permanently in the system — it isn't deleted.

How to decline. To record a decline decision:

1. Open the CBM Member record in the Mentor Admin Application.
2. Select the Member to be declined, and open their details page.
3. Click on the Status tab.
4. Set Mentor Status to Declined.
5. Select an Application Decline Reason from the dropdown — this field is required when declining and becomes part of the permanent record.
6. Select Save.

Notifying the applicant. The system does not send an automatic notification when an application is declined. After saving, you are responsible for contacting the applicant directly to let them know the outcome. This is done outside the CRM — by email or phone — and the content and tone of that communication is at your team's discretion.

The record after a decline. The Contact and CBM Member records remain in the system with Mentor Status = Declined. If a declined applicant attempts to reapply through the website form using the same email address, the system will detect the existing record and block the submission, alerting the Mentor Administrator to handle it manually.

Douglas Bower

DATA COMPLETENESS	MENTORING STATUS	ACCEPTING NEW CLIENTS	EMAIL	PHONE	MAX CAPACITY
Complete	Active	Yes	doug@dougbower.com	(216) 612-4870	5

Profile **Status** Capacity Expertise Compliance Departure Bio

Status

Active

(none)

Prospect

Candidate

Under Review

Accepted-Provisional

Provisional

Approved

Active

Paused

Inactive

Dormant

Resigned

Retired

Declined

Terminated

Type

Mentor

Mentor pause end date

mm/dd/yyyy

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