

Adding Attendees to a Session

After a session is created, you can add the attendees to the session using the following steps:

1. Open the Session Details screen.
2. Click the “...” button to select from existing outside CBM contacts.
3. If the outside CBM contact does not exist, click on the “+” button to create a new contact and add them as attended.
 1. Only do this if you have not added the contact previously. Otherwise, it will create a duplicate contact.
4. To add co-mentors, send a note to clientservices@cbmentors.org to request co-mentors be added to your session. Include in your email:
 1. The names of the co-mentors you would like added to your session.
 2. The actual session name: e.g., [26-06-23 - xChristopher Westfall — Intake 2026-06-01](#)
 3. The URL in the address bar at top of your browser: e.g.
<https://crm-test.clevelandbusinessmentors.org/#CSession/view/6a3b3949c7f26d9c2>
 4. NOTE: the above are links from the test environment, you will not have the word test in your URL.

Sessions > 2026-07-09 Agape Session

Edit

...

Overview

Engagement Info

Session Detail

Date Start

Jul 07 12:45

Duration

1h

Session Type

In-Person

Meeting Location Type

Organization Office

Status

Planned

Location Details

None

Topics Covered

None

Assigned User

None

Teams

None

Created

May 22 12:47 · Admin

Modified

May 22 12:51 · Admin

Notes and Follow-Up

Session Notes

None

Next Steps

None

Next Session Date/Time

None

Attendees

History

Attendees

+

...

Name	Company	Email	Phone	Account Title
Sam Rutigliano				
James Koran	Agape W8Loss	james@agapew8loss.c...	+1 216-903-27...	

Create a new Contact as an Attendee

Select Attendee from existing Contacts

Session

Edit

...

Overview

Engagement Info

Session Detail

Date Start

Jul 07 12:45

Session Type

In-Person

Location Details

None

Notes and Follow-Up

Session Notes

None

Next Steps

None

Next Session Date/Time

None

Attendees

History

Press Select to add Contact to Session

3

Select

Cancel

1

Enter a name to search for a Contact

2

Click on Check Box to select and add the Contact

☐	Name	Company	Email	Phone	Account Title
☐	Request Info	Info Question	rq@info.gom	+1 1232343456	
☐	Jim Beem		jb@gmail.com	+1 1233452345	
☐	Brundene Van Ness	Brundene Van Ness (Pre-Star...	bv@gmail.com	+1 215-123-4567	
☐	James Breiner		james.breiner@cbmentor...	+1 440-532-09...	
☐	sharon Rose		sharon.m.rose@gmail.com	+1 216-870-9728	
☐	David Schwieterman		dave.schwieterman@cbm...	+1 440-220-09...	
☐	ZZTEST-INFOREQ D...	ZZTEST-INFOREQ Bakery	zztest-inforeq@example....	+1 216-555-0199	
☐	Richard Brooks		rmbrooks10@gmail.com	+1 216-403-7284	
☐	Fred Flinstone		fred@gmail.com	+1 1231231234	
☐	Dan Yurman		dan.yurman@cbmentors...	+1 216-555-1212	

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Revision #7

Created 2026-06-17 21:03:24 UTC by Admin

Updated 2026-07-25 01:20:56 UTC by Admin