

Getting Started as a Mentor

Who this guide is for.

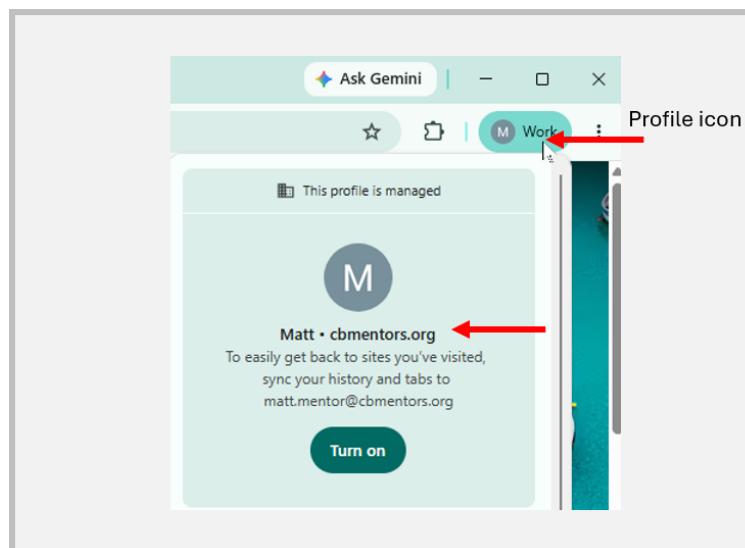
This guide is for CBM mentors, and it assumes you've already read the CRM Introduction Guide on the Start Here shelf — so you know what Contacts, Companies, Engagements, and Sessions are, how to sign in and find your way around, and that what you can see is governed by your User account. This guide picks up from there and walks you through what you actually do as a mentor.

What's expected of you.

CONTACT is where your mentoring is recorded. In practice that comes down to a few things: finding the clients you're assigned to, logging each session after you meet, following up with the people you mentored, and keeping your engagement and your own profile current. The sections that follow take these one at a time.

Signing in.

Make sure you are in the CHROME browser and that your profile is your cbmentors profile.. You may want to set Chrome as your default browser.

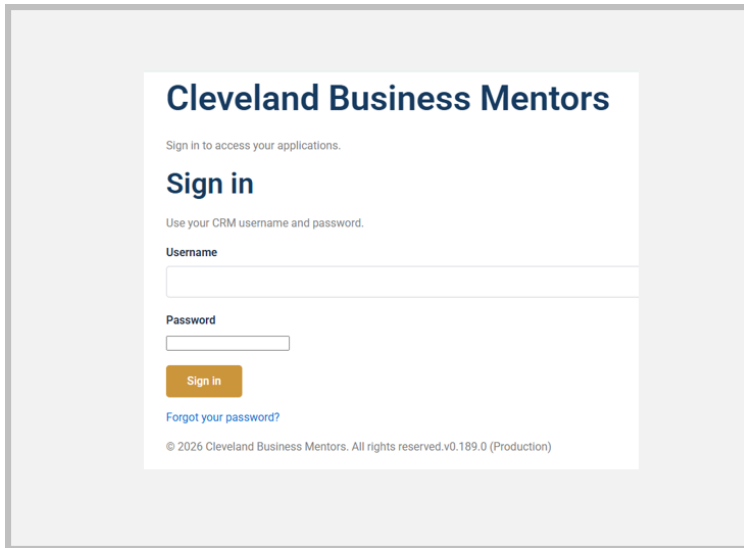


You reach the CRM the same way as any user — see "Signing In" in the Introduction. As a mentor you have a User account for logging in; if you're ever unable to sign in, contact **helpme@cbmentors.org**.

In the browser address bar, type in the **Production CONTACT Apps** URL:

<https://apps.clevelandbusinessmentors.org/> or use your shortcut under CBM in the bookmarks bar.

Sign in using your Google Workspace email address and the password you created when you onboarded.

A screenshot of the Cleveland Business Mentors sign-in page. The page has a light gray background. At the top, the text "Cleveland Business Mentors" is displayed in a bold, dark blue font. Below this, in a smaller font, it says "Sign in to access your applications." followed by "Sign in" in a bold, dark blue font. Underneath, it says "Use your CRM username and password." There are two input fields: "Username" and "Password", both with white backgrounds and thin gray borders. Below the "Password" field is an orange "Sign in" button with white text. A link "Forgot your password?" is located below the button. At the very bottom, in small gray text, it says "© 2026 Cleveland Business Mentors. All rights reserved.v0.189.0 (Production)".

Here you will see the CONTACT Home Page which will shows the areas available to you based upon your role. Matt Mentor's role is Mentor.

Cleveland Business Mentors

Sign in to access your applications.

Signed in as **Matt Mentor**

Sign out

Directories

Open a directory to browse, preview, and edit records. Each opens in its own tab – clicking again brings you back to it.

Companies

Contacts

Mentors

Applications

My Mentor Profile

Client Management

My Email

3

CRM

[CBM CRM](#)

Documentation

User guides for all of the CBM applications.

[CBM Documentation](#)

Public intake forms

[Request a Mentor](#) [/clientintake](#)

[Volunteer / Become a Mentor](#) [/volunteer](#)

[Request Information](#) [/inforequest](#)

[Become a Partner](#) [/partner](#)

[Become a Sponsor](#) [/sponsor](#)

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Please refer to [The Lay of the Land](#) in the CRM Introduction Guide on the Start Here shelf for an explanation of each of the categories in the image above.

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