Running a training session on the sandbox

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For whoever is delivering the training. It covers who to sign in as, what to click, what to tell the room, and what the overnight reset does.

Two documents, and the split matters so they don't drift:

- **This page** — what to *do*: the walkthroughs, the ground rules, the reset.
- **The demo-records reference**, kept with the application source — what's *on* each record: the tab-by-tab inventory, the contribution amounts, the coverage figures. Ask an administrator if you want a copy.

Engineers setting the sandbox up want the sandbox reset runbook instead.

> **Status.** The overnight reset is **live** as of 22 August 2026. The system is restored to a fixed snapshot every night, so anything a session creates, edits or deletes is gone by the next morning and every session starts from the same screens.

Before you start — five minutes

1. Open the training system and sign in as the **training mentor** (Joe Mentor). An administrator will give you the address and password.
2. Look at the **footer**. It must read `(Test)` after the version number. If it says `(Production)` you are in the wrong system — stop.
3. Open **Client Management**. You should see **seven clients**. If the list is empty or short, something has gone wrong; don't improvise, ask.

That's the whole check. If those three things look right, everything below will work.

What to tell the room

Three things, at the start:

- **This is a training system.** Every business, person and email address in it is invented. Nothing here is a real CBM client.
- **You are not expected to save anything** — we're looking, not editing.
- **But if you do save something, it's fine.** Nothing can escape: no email is sent, no calendar invitation goes out, and no document reaches CBM's real Drive. Every address ends `@sandbox.cbmentors.org`, which is a dead end on purpose.

That last point is worth saying out loud. People hesitate to click things in a demo, and the hesitation costs more than the mistake would.

Sign-ins

There is one training account per audience. **Ask an administrator for the addresses and passwords** — they are not listed here, because this page is public. They are the same accounts every time, so once you have them you can keep them.

Audience	Sign in as
Mentors	Joe Mentor
Client Administration	Kitty Cat
Mentor Administration	Mentor Admin
Partner Management	Partner Manager
Funder Management	Sally Sponsor
Submission Admin	Mark Marketing

Nobody trains on their own login. Signing in as yourself puts your real mailbox behind the Send button — the containment described above only holds for these six training accounts.

Walkthrough — mentors

Sign in as **Joe Mentor**. This is the main one; allow 30–40 minutes.

1. The client list. Seven clients, statuses down the side — Active, Assigned, On-Hold, Completed. Show the status filter and the search box before opening anything, so people see the shape of their own future list.

2. Open `Brightline Bakehouse — Mentoring`. This is the record everything else hangs off. Land on **Overview** and point out the facts rail, the notes, and the **Next session** callout with a real date on it.

3. Sessions tab. Eight of them — seven held over the past year, one scheduled ahead. Open a completed one and show the notes and next steps. This is the screen mentors will spend the most time in, so don't rush it.

4. Communications tab. A five-message thread about financing a second oven, alternating between Joe and the client. Show that the history lives on the record rather than in someone's inbox — that's the point of the feature.

5. Contacts tab. Dana Whitcomb, with a phone number, an address, and the agreements badge showing all three consents accepted.

6. Details tab. Every field is filled in, so this is a fair picture of what a complete client record looks like.

7. My Mentor Profile. Joe's own record: bio, expertise, availability, photo. The live preview on the right is exactly what the public website shows, which usually lands well.

Optional, if the group is engaged: `Marlow Pet Supply — Mentoring` is a **Completed** engagement with eleven sessions — useful for showing what a finished relationship looks like.

Walkthrough — Client Administration

Sign in as **Kitty Cat**, open **Client Administration**.

1. Four engagements sit at **Submitted** — Ember Lane Florists, Kestrel Fabrication, Pinehurst Tutoring, Quarry Street Coffee. These are the ones waiting for a mentor.

2. Assign one. Pick Ember Lane Florists. The mentor dropdown offers nine eligible mentors; explain that a mentor only appears if they're Active, accepting new clients, and have a login.

3. After assigning, the email compose opens pre-filled with the mentor's address and the assignment template. **Don't send it** — but do show it, and say the send is what tells the mentor they have a new client.

4. Open Review Mentors — the same list the dropdown draws from, with the numbers behind each name: Active Clients, Assigned (30d), **Last Assigned** and Lifetime. Sort **Last Assigned** ascending. Mentors never given a client come first, reading "—", then the longest-waiting; Tony Tiger and Wally Walrus are the only two assigned within the last month. Point out the mentor from step 2: their Last Assigned now reads today. That is the question the column exists to answer — *who is due for one?* — and it is the app that writes the date, every time an assignment is made here.

5. The Notes column is staff-internal and edits in place. Five rows already have notes; `Whitmore Automotive` reads "*Unresponsive since spring. Consider closing.*"

6. Right-click any row for the full menu — Reassign, Repair assignment, Notes. Use `Halstead Print Works` for Reassign; it's assigned with a single session, so the before-and-after is easy to see.

Walkthrough — Mentor Administration

Sign in as **Mentor Admin**, open **Mentor Administration**. Twenty-six mentors.

1. Open `Joe Mentor`. Reads **Complete** — a linked contact, all three sign-offs, a CBM email, and a login attached to both the profile and the contact. This is what a properly set-up mentor looks like.

2. Open `Claudia Reinhart`. Reads **Incomplete**, and names why: training and terms not confirmed. She's a Candidate, so that's the correct state — the badge is telling you where she is in onboarding, not that something is broken.

3. Nine mentors are Incomplete for a different reason — Active but with no login. That's the backlog the **Update Mentor Status** sweep exists to surface. Worth running the sweep so people see it report rather than guess.

4. The status filter spans Active, Approved, Provisional, Candidate, Paused and Inactive.

Walkthrough — Partner Management

Sign in as **Partner Manager**, open `Cuyahoga Small Business Alliance`.

Overview, then **Sessions** (four quarterly meetings), **Communications** (a four-message thread about the spring referral cohort), and **Referred Clients** — two engagements credited to this partner, which is the tab that usually prompts questions about attribution.

The **Discussion** pane on Overview is worth explaining even though it's empty: it's internal, append-only, and never visible to the partner.

Walkthrough — Funder Management

Sign in as **Sally Sponsor**, open `Harrowgate Family Trust`.

The **Contributions** tab is the reason this is the funder demo: five gifts totalling $63,700, spanning Received, Committed and Pledged, across Grant, Sponsorship and Donation including one In-Kind. Every state anyone will ask about is on one screen.

Then Sessions (four) and Communications (a three-message thread about renewing the 2027 grant).

Walkthrough — Submission Admin

Sign in as **Mark Marketing**, open **Submission Admin**.

The queue is currently empty, so this one demonstrates the screen rather than the workflow. Explain the two status axes — what happened to the arrival versus where the reply conversation stands — and leave it there. If you need a populated queue for a session, ask ahead of time; it can be seeded.

How the overnight reset works

In one sentence: every night the sandbox goes back to exactly the state described in the demo-records reference, so every session starts from the same screens.

What happens. At midnight the CRM is restored from a saved snapshot. An hour later the app's own working data — the Submission Admin queue, record comments, the document index — is cleared to match. The two run an hour apart so they can't overlap.

What comes back. Everything: every client, mentor, session, email thread, contribution and event, exactly as it is today. Anything created during a session disappears. Anything edited returns to its original wording. Anything deleted comes back.

What survives on purpose.

- **The logins and their passwords.** They're part of the snapshot, so they work the next morning unchanged. If a trainee changes their own password during a session, it reverts to the original — which is usually what you want.
- **Anything the CRM team changes in the CRM's own setup** — new fields, layouts, roles. The reset clears the *data*, not the system's design.

What to expect the morning after. Everyone is signed out — the reset clears active sessions — so the first sign-in of the day is a fresh one. That's normal, not a fault.

What the reset cannot undo. Nothing, in practice, because nothing escapes: no email leaves the system, no calendar invitation is created, and documents go to a separate sandbox Drive rather than CBM's real one. This is why "if you do save something, it's fine" is a safe thing to tell the room.

Pausing it. If you need the sandbox to keep its state overnight — a session running late, or something you want to look at again tomorrow — ask whoever runs the platform to pause that night's reset. It's a one-line change and it's designed to be used.

When the demo data needs changing

Don't fix it by hand. A record you correct in the CRM will look right this afternoon and be gone by tomorrow morning, because the snapshot doesn't know about it. That's the single most confusing thing about this environment, and it catches people out.

Instead, say what you need and it gets added to the scripts that build the sandbox, then a new snapshot is taken. Same effort, and it survives.

Reasonable things to ask for: a populated Submission Admin queue, a second co-mentored client, documents on a record once that's possible, more clients if the grids feel thin.

If something looks wrong

Check the footer says `(Test)` and that Joe Mentor still has seven clients. If either is off, stop and ask rather than working around it — a restore takes about half a minute and is the normal fix, not a drama.

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