WELCOME TO

CBM Marketing Suite

YOUR GETTING STARTED GUIDE

CONSISTENT MARKETING. POWERFUL RESULTS.

VERSION 1.2 DRAFT – NOVEMBER 2026

Welcome! The CBM Marketing Suite is your command center for your customers, leads, appointments and marketing – all in one place, on your computer or your phone. You don't need to be "techy" to use it. This guide walks you through the basics one small step at a time. You can't break anything by looking around. Keep this guide handy as you explore. **The CBM Marketing Suite offers customizable roles for your team** – you choose which tabs each person sees (see Users, Roles & Permissions later in this guide).

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NUMBERED STEPS
Follow them in order – one small action at a time.

TIP BOXES
Shortcuts and good habits from the CBM team.

SCREENSHOT BOXES
Show what you'll see on your own screen.

SECTION 01

LOGGING IN

On your computer

1. Look for your **welcome email** from CBM Marketing Solutions (check your spam folder if you don't see it).
2. Click the link in the email and **create your password**.
3. Next time, go to the login link CBM gave you and sign in with your email and password.
4. Forgot your password? Use the **"Forgot password"** link on the login screen to reset it.

On your phone

1. Download the **BusinessApp.io** app from the Apple App Store or Google Play.
2. Sign in with the **same email and password** you use on your computer.

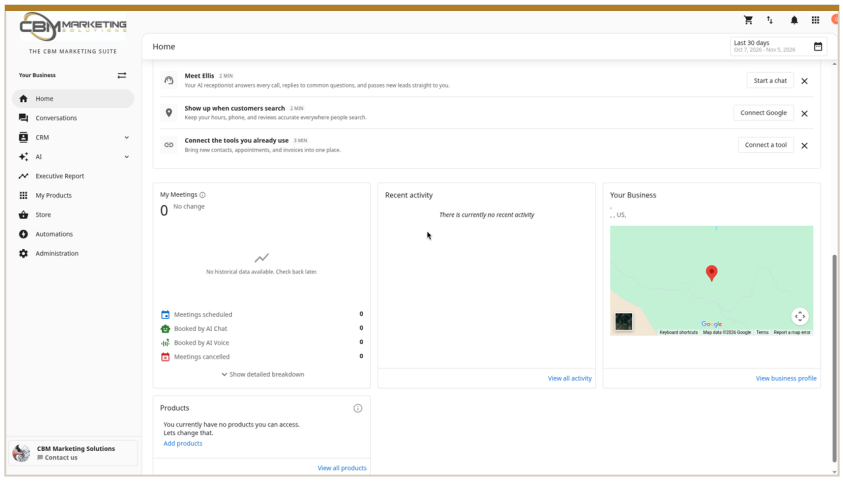
> **TIP** Bookmark your login page in your web browser so it's always one click away.

SECTION 02 · A QUICK TOUR

YOUR DASHBOARD

After you log in, you'll land on your **home dashboard** – a snapshot of how your business is doing. Here's what you'll typically see:

- **Left menu** – your main navigation. Click any item (like Contacts or Opportunities) to open it. You'll only see the tabs your access includes (see page 6).
- **Main area** – summaries and highlights, such as recent activity and performance.
- **Top bar** – your business name, notifications (bell icon) and your profile/settings.



Your Business home dashboard: left menu, Home selected, and main area.

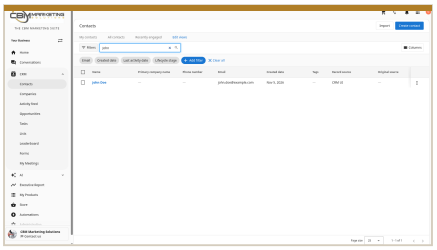
> **GOOD TO KNOW** Not sure where something is? Hover over items in the left menu – each one is labeled, and clicking around is completely safe.

YOUR CONTACTS

Contacts is your digital address book – every customer and lead in one organized place. Open **Contacts** from the left menu to get started.

Viewing your contacts

1. Open **Contacts** from the left menu.
2. Scroll the list, or type a name, email or phone number into the **search box**.
3. Click any contact's name to see their full details and history.



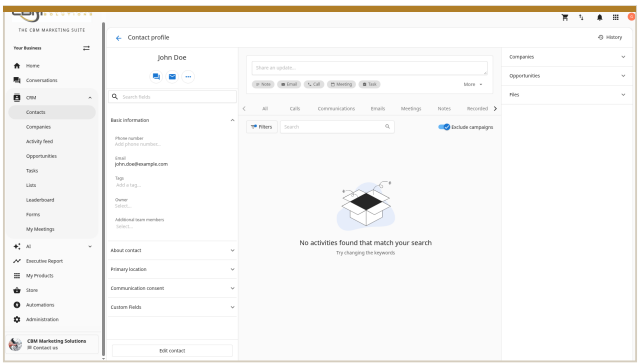
Contacts list with search for "john" – sample contact John Doe (example data).

Adding a new contact

1. On the Contacts page, click the button to **create or add a contact** (usually near the top right).
2. Fill in what you know – name, email, phone. Only a few fields are needed; you can add more later.
3. Click **Save**. Your new contact now appears in the list.

Editing a contact

1. Click the contact's name to open their details.
2. Click **Edit** (or click directly on the field you want to change).
3. Update the information and click **Save**.



Sample contact John Doe (example data): details, activity, and related panels.

Deleting a contact

1. Find the contact in your list, or open their details page.
2. Open the **actions menu** (often shown as three dots) and choose **Delete**.
3. Confirm when asked.

> **TIP** Deleting can't always be undone. If you're unsure, leave the contact in place and ask the CBM team first.

OPPORTUNITY MANAGER

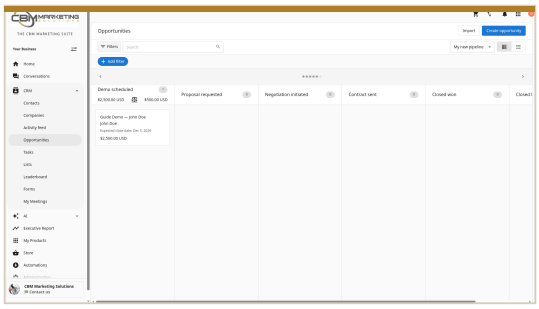
Think of the Opportunity Manager as a **visual to-do board for your sales**. Each potential deal is an "opportunity," and it moves through **stages** – from first conversation to closed deal – so you always know who to follow up with next.

NEW LEAD	CONTACTED	QUOTE SENT	WON / LOST

Example stages only – your pipeline's stage names may be different, and CBM can tailor them for you.

Adding an opportunity

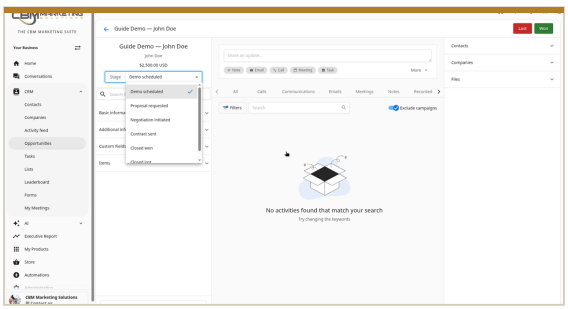
1. Open **Opportunities** (your pipeline) from the left menu.
2. Click the button to **create or add an opportunity**.
3. Give it a clear name (for example, *"Smith – Kitchen Remodel"*) and link it to the right contact.
4. Choose its starting stage, add any notes, and click **Save**.



Pipeline board with sample opportunity "Guide Demo — John Doe" ($2,500) – example data only.

Moving an opportunity through stages

1. Find the opportunity on your pipeline board.
2. **Drag and drop** it into the next stage column – or open it and change its stage there.
3. When a deal is finished, mark it as **Won** or **Lost** so your numbers stay accurate.



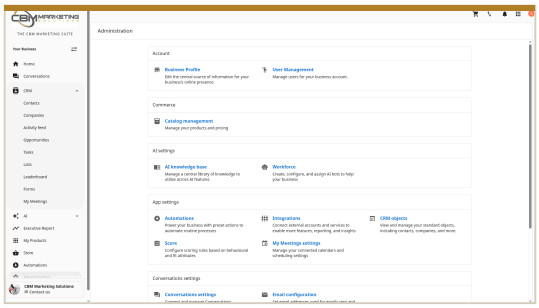
Open an opportunity and use the Stage dropdown to move it (sample: Demo scheduled).

> **TIP** Spend five minutes each Monday reviewing your pipeline. Anything that hasn't moved in a while is a great reminder to follow up.

SECTION 05

ADMINISTRATION BASICS

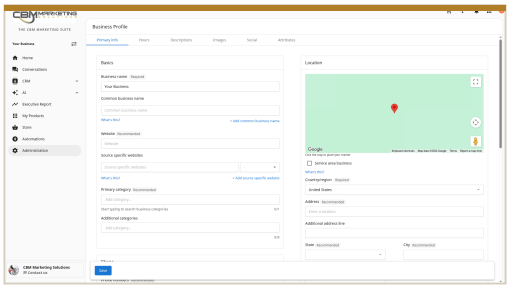
A few quick settings keep your account accurate and working the way you like. Open **Administration** from the left menu for business profile, users and related settings – or click your name/profile icon at the top of the screen for personal options like notifications.



Administration hub: Business Profile, User Management and other account settings.

Your business profile

1. From Administration, open **Business Profile**.
2. Check your business name, address, phone, website, hours and description.
3. Update anything that's out of date and click **Save**.



Business Profile (Primary info): name, website, categories and location.

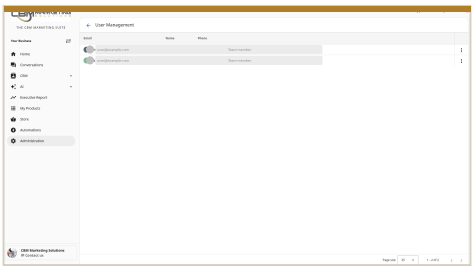
> **TIP** Keep your business profile accurate – it's the foundation for everything else. Want those details kept in sync across Google, Apple, Bing and more? That's what the **CBM Listing Sync** add-on does (see CBM Listing Sync later in this guide).

USERS & NOTIFICATIONS

Users (giving your team access)

1. From Administration, open **User Management**.
2. Choose to **add or invite a user** and enter their name and email.
3. Send the invite – they'll get a welcome email to set up their own login. (Choosing what each person can see is covered in the next section.)
4. To remove someone who has left, find them in the user list and remove their access.

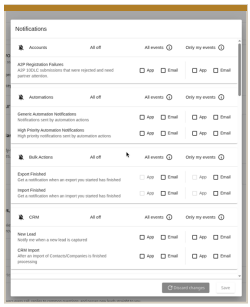
> **TIP** Give each team member their own login rather than sharing yours. It's safer and keeps activity clear.



User Management: each team member has their own login (personal details redacted in this guide).

Notification settings

1. Click your **name or profile icon** and open your notification settings.
2. Choose which updates you'd like to receive (for example, new leads) and how – by email or in the app.
3. Save your changes. You can adjust these anytime.



Notification settings: choose App or Email alerts by category.

> **GOOD TO KNOW** Start with just the essentials turned on – you can always add more once you're comfortable.

SECTION 06 · WHO SEES WHAT

USERS, ROLES & PERMISSIONS

Everyone on your team gets their own login, and you decide which parts of the Suite each person can see. There are **no preset roles** to pick from – instead, each user has simple **on/off switches**, one for each of 16 tabs: User Management, Home, Conversations, CRM, My Meetings, AI, Executive Report, Store, Business Profile, Integrations, Guides, Files, Invoices, Orders, Automations, My Products.

> **GOOD TO KNOW** The exact Permissions screen can vary by account setup. Use the tab list and recommended starting points below as a guide – or ask the CBM team to set access with you.

What the switches control

- **Each person sees only the tabs that are turned on.** Tabs that are off don't appear for them at all – they aren't greyed out, they're simply not there.
- **User Management** decides whether someone *can add and manage users* or *cannot add or manage users*.
- **CRM is all or nothing.** There's no separate view-only or edit setting – CRM is either on or off.
- **Select all** and **Clear all** buttons let you switch everything on or off in one click.

Recommended starting points *(CBM's recommendations – adjust to fit your team)*

ROLE	TURN ON	NOTES
OWNER / ADMIN	All 16 tabs	Full access, including User Management.
SALES	Home, CRM	Optional: Conversations, My Meetings.
OFFICE / FRONT DESK	Home, Conversations, CRM, My Meetings	
MARKETING	Home, Automations, AI, Files, Business Profile	

Customizing a user's access

1. When inviting someone, find the **Customize users** section in the **Invite users** panel.
2. Click the user, then open **Permissions**.
3. Click **Clear all**, then turn on just the tabs that person's role needs (use the table above as a guide).
4. Finish the invite. The new user receives a **welcome email** to get started.
5. Need to change it later? An admin can return to the user's **Permissions** and adjust the switches at any time.

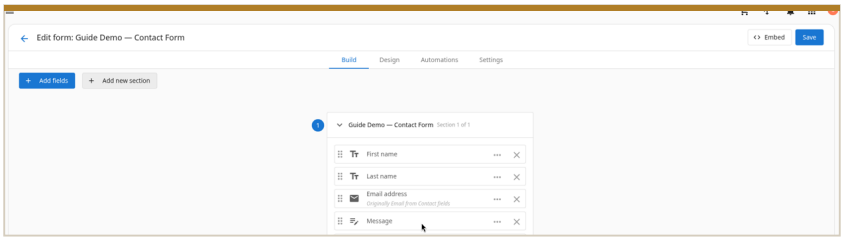
> **GOOD TO KNOW** Seeing fewer tabs than someone else on your team? That's normal – your screen only shows the tabs your role needs. If you need something that isn't there, just ask your account owner or the CBM team.

FORMS & AUTOMATIONS

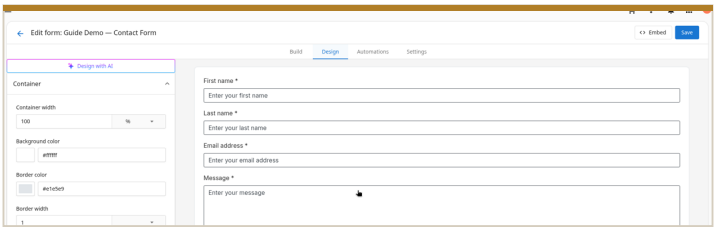
Your free Suite can collect leads with a **form** and run simple **automations** when something happens (for example, when a form is submitted). The screens below are an **unpublished sample** in the Your Business demo account – example data only, not a live client workflow.

A sample contact form

Open **CRM Forms** (under the CRM menu) to create or edit a form. Add the fields you need – such as name, email and a message – then save. You can embed the form on your website when you're ready.



Unpublished sample: Guide Demo — Contact Form (Build view) with name, email and message fields.

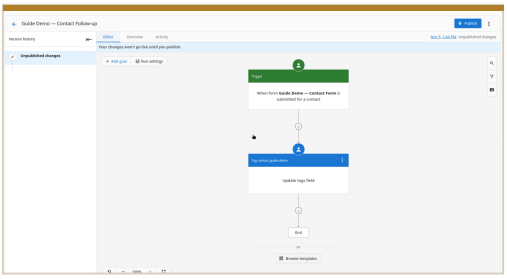


Unpublished sample: the same form in Design view (fields and message).

> **GOOD TO KNOW** Before you publish a form that asks for marketing consent, finish your privacy policy and terms links so visitors see real URLs – not placeholders.

A sample automation (draft / off)

Open **Automations** from the left menu. Automations stay off until you **Publish**. This sample is a simple draft: when the Guide Demo contact form is submitted, it tags the contact **guide-demo**. It does **not** send email or SMS.



Unpublished draft: form submitted Tag contact "guide-demo" End. No email or SMS steps.

> **GOOD TO KNOW** Draft automations will not run for real contacts until you publish. Always review the steps before turning one on.

PART 2 · ADD-ON TOOLS

FREE SUITE VS. ADD-ONS

Your CBM Marketing Suite account is **free** and covers the everyday basics. When you're ready to do more, CBM offers **add-on tools** that plug right into the same dashboard – no new logins or separate systems to learn.

INCLUDED FREE IN YOUR MARKETING SUITE
✓ CRM with contact tracking and lead management
✓ Your dashboard on desktop and mobile (BusinessApp.io)
✓ Analytics connections (Google Analytics, Search Console, social)
✓ Form integration for your website and landing pages
✓ Appointment scheduler with automated confirmations
✓ Email follow-ups (pre-built templates included)

> **GOOD TO KNOW** **Text-message (SMS) follow-ups, business listings and review management are not part of the free Suite** – they come with the add-on tools below. Not sure what you have? Just ask the CBM team.

ADD-ON TOOL	WHAT IT HELPS WITH	PAGE
CBM AI	Answers website chats and social messages 24/7 (plus texts and calls on higher plans) and books appointments.	10–11
CBM CATALYST	Email & SMS (text) campaigns and follow-ups that bring customers back.	12–13
CBM LISTING SYNC	Keeps your business listings accurate on Google, Apple, Bing and hundreds more.	14
CBM PULSE	Gets you more reviews, helps you reply with AI and tracks your reputation.	15
CBM SOCIAL	Plan, schedule, post and track your social media from one dashboard.	16

How to add a tool

1. Sign in to your free CBM Marketing Suite.
2. Click the **Store** button in the bottom menu on the left side, then click **CBM Tools**.
3. Choose the tool and click the link to that product – or book a setup call and CBM will help you choose and set it up.

ADD-ON TOOL · CBM AI

CBM AI

Your 24/7 AI receptionist.

What it is. CBM AI is an always-on AI assistant that answers your customers, captures leads and books appointments – on your website, social media and, depending on your plan, by text and phone. It's like having a front desk that never misses a call or message.

What it does for your business

- **Engage every lead instantly** – respond across chat, social, text and voice within seconds.
- **Never miss an opportunity** – capture calls, texts and messages even after hours.
- **Book more appointments automatically** – the AI handles scheduling and reminders.
- **Free up your team** – they focus on great service while CBM AI handles first responses.

Key features

AI WEBCHAT
Chats with visitors on your website and captures their details.

SOCIAL MESSAGING
Answers Facebook Messenger, Instagram DMs and WhatsApp.

24/7 BOOKING
Books appointments any time of day or night.

SHARED INBOX & CRM
All conversations land in one inbox inside your Marketing Suite – you choose which channel to reply from.

TRAINED ON YOUR BUSINESS
Learns your website, services, hours and FAQs, and replies in multiple languages.

How you'll use it

CBM AI answers first. When a conversation needs a person, it's handed off to your **shared inbox** in the Marketing Suite, where you can pick it up and reply from the channel you choose.

GOOD TO KNOW Industries where lots of leads come in after hours – like home services, dental, auto repair and legal – often see the biggest benefit.

ADD-ON TOOL · CBM AI (CONTINUED)

CHOOSING YOUR PLAN

CBM AI comes in three plans. Each one includes everything in the plan before it. Your CBM team will help you pick the right fit.

FEATURE	STANDARD	PRO	PREMIUM
AI webchat on your website	✓	✓	✓
Facebook, Instagram & WhatsApp replies	✓	✓	✓

Books appointments 24/7	✓	✓	✓
Shared inbox & CRM	✓	✓	✓
Replies in multiple languages	✓	✓	✓
Trained on your business	✓	✓	✓
SMS texting (US & Canada)	–	✓	✓
Missed-call text-back	–	✓	✓
AI voice receptionist (answers your phone)	–	–	✓

Standard is available worldwide. Pro and Premium (texting and voice) are available in the U.S. and Canada. Premium includes a monthly allowance of AI voice minutes.

About business texting

U.S. phone carriers require businesses that text customers to register first (called **A2P 10DLC**). For Pro and Premium, **CBM handles this registration for you** during setup. It needs your business EIN, and texting turns on once the carriers approve it.

Getting started

1. Make sure you have your **free CBM Marketing Suite** account (the CBM team can help you set it up).
2. In the Suite, click the **Store** button in the bottom menu on the left side, then click **CBM Tools** to find **CBM AI**.
3. Click the link to the product, or **book a setup call** with CBM and we'll walk you through it.

What happens next: we book a setup call, train CBM AI on your business (website, services, hours, FAQs), connect your channels, test everything, and go live once you approve. Webchat and social messaging can go live as soon as setup and your review are done; texting starts after carrier approval.

WHO TO CONTACT Your CBM Account Manager or the CBM team: **928-499-5944** · **info@cbmmarketingsolutions.com**

ADD-ON TOOL · CBM CATALYST

CBM CATALYST

Simple email & SMS marketing that brings customers back.

What it is. CBM Catalyst lets you send professional **email campaigns** and reach customers by **text message (SMS)** – all from your Marketing Suite dashboard. Best of all, **our team sets it up for you**, start to finish.

What it does for your business

Most local businesses have hundreds of past customers and leads they never follow up with. Catalyst turns that list into repeat business – welcome messages, promotions, reminders and win-back offers that go out on schedule while you run your business.

- **Follow up automatically**, so no lead goes cold.
- **Fill slow days** with time-sensitive offers.
- **See who opened, clicked and came back.**

Key features

AI EMAIL BUILDER & TEMPLATES

Write a ready-to-send email from one prompt, using professional designs you can brand as your own. (AI writing is for email only, for now.)

CRM TARGETING

Send to the right group of customers – not your whole list.

MULTI-STEP AUTOMATIONS

Schedule a full email journey in minutes.

SMS CAMPAIGNS

Text your customers. A monthly text allowance is included, with larger bundles available. Texting starts once carrier registration is approved.

REPORTING

See opens, clicks and campaign performance in real time.

How you'll use it

Once CBM sets up your first campaign, your messages go out on schedule. Check your reports to see who opened, clicked and came back – and talk with CBM whenever you want a new promotion or follow-up.

ADD-ON TOOL · CBM CATALYST (CONTINUED)

WE SET IT UP FOR YOU

Catalyst is activated inside your free CBM Marketing Suite. Here's what the CBM team does so your messages actually get delivered:

1. **Activate** Catalyst and your included text credits.
2. **Register your business for texting** with the carriers (A2P 10DLC). Approval usually takes 1 week to 1 month.
3. **Check your website** privacy policy, terms and opt-in forms so they meet carrier rules.
4. **Set up your sending email** and authenticate your domain so emails land in the inbox.
5. **Import and organize** your contacts who have agreed to hear from you.
6. **Build your first campaign** – a main email, two follow-up emails and one text – and run a test send.
7. **You review and approve**, we do a final quality check, then we launch and walk you through your reports.

GOOD TO KNOW Email can go live while your texting registration is still pending – you don't have to wait to get started.

What you'll need to provide

- Your legal business name, EIN and address (as shown on your IRS letter)
- An authorized contact person
- Access to your website domain
- Your contact list, with proof that contacts agreed to hear from you
- A short brief about your campaign

A few texting rules

You can only text people who have **agreed to receive texts** – we'll help you set up compliant opt-in forms. Some industries can't register for business texting (for example alcohol sold direct to consumers, cannabis/CBD, tobacco/vape, firearms, high-interest lending, gambling and MLM), and very new EINs may need to wait. We check eligibility before setup begins.

Getting started

1. Make sure you have your **free CBM Marketing Suite** account (the CBM team can help you set it up).
2. In the Suite, click the **Store** button in the bottom menu on the left side, then click **CBM Tools** to find **CBM Catalyst**.
3. Click the link to the product, or **book a setup call** with CBM and we'll walk you through it.

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ADD-ON TOOL · CBM LISTING SYNC

CBM LISTING SYNC

Sync once. Appear everywhere.

What it is. CBM Listing Sync is AI-powered local SEO software that **automatically keeps your business information correct** across hundreds of top platforms – so every directory, map and voice assistant lists your details the same way.

What it does for your business

- **Get found** wherever customers search – online, on maps and on smart speakers.
- **Stay accurate** – update once and changes go out to connected directories.
- **Build your online authority** with consistent listings and links across the web.

Key features

CORE NETWORK SYNC

Keeps your listing in sync on Google, Facebook, Apple (via Apple Business Connect), Bing, Instagram and X.

AI-POWERED LOCAL SEO

AI keyword recommendations, automatic SEO insights and keyword-rich business descriptions.

RANK TRACKING MAP

See how you rank across your service area, spot weak areas and track progress over time.

GOOGLE & BING INSIGHTS

Calls, website visits, map views, direction requests and how customers discover you.

WIDER DISTRIBUTION

Pushes your information to 300+ data sources through trusted aggregators like Data Axle, Neustar/Localeze and Foursquare. Listing Sync Pro reaches even further.

Getting started

1. Make sure you have your **free CBM Marketing Suite** account (the CBM team can help you set it up).
2. In the Suite, click the **Store** button in the bottom menu on the left side, then click **CBM Tools** to find **CBM Listing Sync**.
3. Click the link to the product, or **book a setup call** with CBM and we'll walk you through it.

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ADD-ON TOOL · CBM PULSE

CBM PULSE

AI reputation management – turn customer feedback into growth.

What it is. CBM Pulse is a reputation platform for local businesses. It **asks your customers for reviews**, helps you **reply with AI**, and keeps an eye on what people are saying about your business online.

What it does for your business

- **More reviews** from happy customers, right after the job is done.
- **Faster replies** to every review – without writing each one from scratch.
- **A clear picture** of where your reputation stands and what needs attention.

Key features

REVIEW REQUESTS

Ask by text or email using ready-made templates. Connects with tools like QuickBooks and Jobber, and sends customers straight to your Google and Facebook review pages.

AI REVIEW REPLIES

Drafts a reply for each review. Auto-replies can be turned on for Google and Facebook; on other sites you approve before anything posts.

REPUTATION DASHBOARD

Your reviews, customer sentiment and how you compare with competitors – at a glance.

RATINGS & MENTION TRACKING

Follow ratings and response rate over time, and track mentions across 100+ review sites – including when a customer edits a review.

NPS SURVEYS

Find out how likely customers are to recommend you, and where to improve.

GOOD TO KNOW You stay in control: AI only posts replies automatically if you choose to turn that on.

Getting started

CBM Pulse is **self-serve**. Click the **Store** button in the bottom-left menu of your Marketing Suite, then **CBM Tools** to find CBM Pulse. Prefer a walkthrough? **Schedule time with Leslie**, our Business Operations Manager.

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ADD-ON TOOL · CBM SOCIAL

CBM SOCIAL

Plan, post and track across every channel from one simple dashboard.

What it is. CBM Social is your social media command center. It helps you **plan, publish and measure** your content across Facebook, Instagram, LinkedIn, Google Business and even your website's blog – keeping your online presence consistent.

What it does for your business

- **Stay active** on every major platform with a professional presence.
- **Save time** by scheduling posts in advance.
- **Connect social and your website** for stronger search (SEO) results.

Key features

EVERYTHING IN ONE PLACE

Manage Facebook, Instagram, LinkedIn, Twitter/X, Google Business and more from one dashboard.

SCHEDULING & TEAM CALENDAR

Pre-schedule content so your profiles never go quiet, and plan together with your team.

BLOG PUBLISHING

Post directly to your website's blog while sharing customized versions to social.

ANALYTICS & ENGAGEMENT

Track likes, shares, comments, clicks and conversions.

AI CONTENT TOOLS & MORE

AI help to create and schedule posts, Clickable.bio for Instagram, a content library with Pixabay images, and lead-finding tools by keyword and location.

Getting started

1. Make sure you have your **free CBM Marketing Suite** account (the CBM team can help you set it up).
2. In the Suite, click the **Store** button in the bottom menu on the left side, then click **CBM Tools** to find **CBM Social**.
3. Click the link to the product, or **book a setup call** with CBM and we'll walk you through it.

WHO TO CONTACT Your CBM Account Manager or the CBM team: **928-499-5944** · **info@cbmmarketingsolutions.com**

WHERE TO GET HELP

The **CBM Marketing Suite** is **self-serve**. Support is **not** included as standard with the free Suite — this guide and the Knowledge Base are here so you can learn the tools at your own pace.

PREFER US TO HANDLE THE MANAGEMENT?
Our **Managed Marketing Suite** is **$300 per month**. It takes the day-to-day management off your plate so you can focus on running your business. Ask your CBM Account Manager if you'd like to learn more.

Self-serve resources

- **This guide** – step-by-step walkthroughs for the free Suite basics.
- **Help links in the app** – many pages include short explanations.
- **Knowledge Base** – full Marketing Suite documentation (link and QR below).

FULL MARKETING SUITE KNOWLEDGE BASE

For how-to articles and product documentation, visit the Knowledge Base anytime (also linked from the **CBM Marketing Suite** submenu on cbmmarketingsolutions.com):

https://docs.businessapp.io/business-app/crm/

Scan the QR code to open the Knowledge Base on your phone.

Questions about Managed Marketing Suite or add-on tools?

For Managed Marketing Suite, add-on products, or sales questions, reach the CBM team using the contact details below. That's separate from day-to-day Suite support, which is not included with the free self-serve platform.

CONTACT THE CBM TEAM

PHONE 928-499-5944
EMAIL info@cbmmarketingsolutions.com
WEB cbmmarketingsolutions.com
OFFICE 830 South Main Street, Suite 2H, Cottonwood, AZ 86326

Your dedicated Account Manager is also happy to help – just reach out directly.

Quick reference

I WANT TO...	WHERE TO GO
See my business at a glance	Home dashboard
Find or add a customer	Contacts (left menu)
Track a potential sale	Opportunities (left menu)
Update my business details	Administration › Business Profile

Add a team member	Administration › User Management
Change my alerts	Profile / notification settings
Build a lead form	CRM › Forms
Set up a simple automation	Automations (left menu)
Add a CBM tool	Store (bottom-left menu) › CBM Tools

YOU'VE GOT THIS! Start small – add a few contacts, create one opportunity, and check your dashboard once a week. Use this guide and the Knowledge Base whenever you need a refresher.