TechieCRM — User & Administrator Manual

Your complete guide to the TechieCRM platform — desktop, web portal and mobile.

29 User Guide chapters · 9 Administrator Guide chapters

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Online edition with search: **https://www.techiecrm.com/docs/**

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Chapter 1 — The Entrepreneur Dashboard

The Entrepreneur Dashboard gives a small-business owner the whole health of the business at a glance, laid out like a car's instrument cluster. Where a car tells you speed, fuel, and engine load so you can drive safely, TechieCRM tells you revenue pace, cash, and workload so you can run the business safely. It sits at the bottom of your Agenda and updates as you work.

This chapter is the reference for using and setting up the dashboard. Administrators preparing a source-CRM database for a client who has not yet migrated should read **"Preparing a database"** at the end.

In this chapter

- Reading the gauges
- Warning & idiot lights
- Odometer and trip meters
- Driver view vs. fleet view
- Setting your targets (calibration)
- Where the numbers come from
- Preparing a database (administrators)

Reading the gauges

The dashboard has five gauges, left to right: **Cash**, **Work**, **Revenue**, **Credit**, **Runway**. The two large dials in the middle (Work and Revenue) are what you steer on daily; the three smaller dials are the constraints that quietly end businesses — cash, credit, and how many days of operating money you have left.

Instrument	Reads as	What it tells you
Fuel gauge (E→F)	Bank balance vs. a healthy-cash reference	How much runway is in the tank. Near **E** you cannot make payroll.
Temperature / pressure (C→H)	Credit used vs. your credit limit — **high is bad**	Running hot means no shock absorber left for a bad month.
Tachometer (RPM)	Scheduled calendar items in the period — the appointments and meetings your calendar returns for those dates	Below the **idle line** the engine stalls — too little booked work to keep running. The **redline** is overbooked / burnout.
Speedometer ($/period)	Revenue paid + committed this period	The **speed limit** is the income you need. Under it you won't arrive on time; over it is fine — you get there sooner.
Runway (days)	Days of operating money left at your current burn rate — bank balance ÷ daily burn	Reads **0–180 days**, with **90 days** marked as the comfortable floor. It only shows a figure once you have both a bank balance and a burn rate recorded; otherwise it reads **SET UP**.

The speedometer is shown in **dollars per period** (monthly until you set a Dashboard Period; see

Setting your targets). The coloured bands on each gauge are your thresholds: green where you're healthy, amber where you should look, red where you must act.

Warning & idiot lights

Gauges are for trends you watch over time; the warning lights are for exceptions that need a decision **today**. Each light stays dark until something crosses a line, then glows **amber** (look soon) or **red** (act now).

Light	Meaning	Lit when
Oil pressure (red)	Accounts receivable overdue — cash is the oil	An invoice is past due
Battery / charging (amber)	Pipeline not being replenished	Few/no new opportunities created recently
Check engine (amber)	Something needs a look, not on fire	Opportunities aging past their stage; a key client gone quiet
Missed meetings (amber)	No-shows / un-actioned meetings	Meetings past with no outcome logged
Lost sale (red)	A deal was lost	Opportunities marked Lost this period (flashes the lost value)
Seatbelt	Exposure	Unsigned quotes / expired agreements
Temperature/capacity	Overload	Open cases or committed hours exceed capacity
Cruise control (green)	Income on autopilot	Share of revenue that is recurring

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Odometer and trip meters

The central display is your mileage:

- **Odometer** — **lifetime revenue** ("business mileage"). It only goes up: milestones, tenure, proof of how far you've come.
- **Trip meters** — revenue for **this year, this quarter, this month, and this week**, all shown at once so you can read momentum at every horizon without changing screens.
- **Runway** — days of operation left at your current burn rate. It is the fifth dial in the gauge row (see *Reading the gauges*), reading in days, e.g. "47d" — the most actionable number on the panel.

Which won sales count, and which date they're filed under. The speedometer and odometer total each **Won** opportunity's Forecast Revenue — the same figure the Sales list shows as "Revenue", not Actual Revenue, which TechieCRM does not yet record when a sale is won (Chapter 24 explains why). A won sale is filed under its real **Close Date**; a won sale with no close date recorded is filed under the year it was **opened** instead, rather than dropped from the totals — the same rule Sales Quotas uses (Chapter 24, "Which year a won or lost sale counts in"), so a sale missing here would otherwise be invisible to the odometer rather than merely approximate. That fallback answers a different question from "when did this close", so as with Quotas, four situations are possible: every won sale carries a close date (**measured**); some do and some do not (**mixed**); none do, so every figure is filed under the year those sales opened (**opened-year-only**); or there are no won sales at all, in which case a $0 reading is real (**no settled sales**). In the two middle cases — where some or all of the won sales behind the figures have no close date — an amber **DATE** lamp lights in the warning row at the bottom of the panel, and its tooltip says which year those figures are filed under. When every won sale is close-dated the lamp stays dark, so seeing it lit is the signal, not something to check for.

Driver view vs. fleet view

The dashboard reads its per-user numbers from **User-ID user-defined fields** and your own calendar, pipeline, and financials. That one design choice gives two views:

- **Driver view** — *my dashboard*. Your gauges, calibrated to your own targets.
- **Fleet view** — *the manager's wall of cars*. Because every metric lives in a per-user field, a manager rolls them up across a team — total the workload, average the pace, sum the cash — or shows one mini-cluster per person, side by side, to see whose engine is stalling and whose credit is red.

Setting your targets (calibration)

A few numbers are **your expectations**, entered once and adjusted as the business grows. They set where the coloured bands and the idle/redline/speed-limit marks sit. Enter them under **Clients ▸ Users ▸ (your user) ▸ User-Defined Fields ▸ Entrepreneur Dashboard**, or in the dashboard's own setup.

Field	Gauge	Meaning
Income Target (per period)	Speedometer	The income you need — the speed limit / floor
Income Stretch Goal (period)	Speedometer	An above-target stretch band
Planned Work – Minimum	Tachometer	The idle line — least booked work to keep running
Planned Work – Redline	Tachometer	The redline — overbooked above this
Dashboard Period	All	The period the gauges use (Week / Month / Quarter / Year)

If your source CRM uses **Quotas** (Sales quotas per user), the dashboard uses your quota as the income target automatically and only reads the **Income Target** field above when you have no quota for the current fiscal year. Quotas are annual, so the dashboard scales yours down to the period you are viewing: the year shows the whole quota; a quarter or a month shows that period's quota milestones if you set them, otherwise an even quarter/twelfth of the annual figure; a week shows the month's share spread over the days in that month.

Where the numbers come from

The dashboard **reuses** the data you already keep in TechieCRM instead of asking you to re-enter it. Only the calibration fields above and the company financial figures are new.

Reading	Source
Revenue pace, odometer, trips	Sales — each **Won** opportunity's Forecast Revenue
Income target (speed limit)	Quotas, or your per-user Income Target field
Planned work (tachometer)	Scheduled calendar items in the period (appointments / meetings from your calendar)
Expenses / burn	Personal ▸ Income & Expenses
Accounts payable (bills due)	Accounts Payable / Receivable (see Ch. 13)
Bank balance, credit	Company financials (entered per business)

Bank balance, business credit, and bills payable are things the source CRM never modeled — TechieCRM adds a company-financials layer to hold them (see *Preparing a database*).

Preparing a database (administrators)

This section is for administrators enabling the dashboard on a **source-CRM SQL database** for a client who has not yet migrated to the TechieCRM native database.

The dashboard needs a small amount of field structure added to the source database. TechieCRM creates it for you; there is also a standalone script for DBAs who prefer to run SQL directly.

What gets added

- Per-user user-defined fields (the calibration fields above) under an **"Entrepreneur Dashboard"** folder, in the reserved field range **61000–61019** (Client_Type 16 — user fields).
- Two company tables — `TCRM_Company_Financials` (bank / credit / cash target / burn) and `TCRM_Payable` (bills due). These hold the financial layer the source CRM lacks; `Assigned_User` is `NULL` for company-wide values or a user id for a person's own.

What does *not* get added — nothing that already exists. Sales targets stay in Quotas, revenue in Sales, expenses in Personal ▸ Income & Expenses, invoices in the existing billing table. The prep only fills genuine gaps.

To prepare a database

1. In TechieCRM: run the dashboard setup (it is idempotent — safe to run again), which calls `EntrepreneurDashboardSetup.prep()`. It creates the fields and tables and reports what it did.
2. Or, for a DBA: run `docs/db/entrepreneur_dashboard_prep_alpha.sql` against the target database after setting the `@Owner` variable to the acting CRM user. It is idempotent and includes a commented teardown.

The prep does not consume the source CRM's field-sequence counter and works even on databases whose counter has overflowed, so it is safe on any source database. No data is invented — you enter your own targets and financial figures afterward.

Alpha note. The Entrepreneur Dashboard is an early feature. The prep (fields + tables) and the Accounts Payable/Receivable data layer are built and verified; the live gauge rendering and the company-financials entry screens are in progress.

Chapter 2 — Getting started: the workspace

TechieCRM opens on the **Clients** list with the **Related** entries and **Interactions** panels below it, an **icon bar** of modules on the left, a **ribbon** across the top and the **calendar control bar** on the right. Everything you learn here applies to every module.

In this chapter

- Logging in
- The icon bar and the ribbon
- Record lists (the "guide") — icons, sorting, right-click, open
- Layouts: Classic, Stacked, Outlook, Floating; popping a panel out
- Master-detail: Related + Interactions follow the selected record
- Interactions — one timeline for everything about a record
- Settings

Logging in

Choose the SQL Server and Address Book (database) and enter your CRM user ID and password. TechieCRM reads your existing CRM data in place. If the server is unreachable you get a plain "couldn't reach the database" message and can retry.

On every later launch, TechieCRM reopens whichever module was on screen when you last closed it — unless Settings ▸ Agenda ▸ *When starting, go directly to* is set, which always takes priority (Chapter 23).

On first launch the app also starts a **7-day cloud trial** for this computer (see Chapter 13). If the trial has ended and no license is installed you are asked to activate.

The icon bar

The icon bar lists the modules: **Agenda, Clients, Sales, To-Do, Calendar, Email, Messages, Library, Dashboards, Quotas, Marketing, Service, Inventory, Projects, Financials, Work Orders, Partners, Agreements, Compliance & SLA, HR & Payroll, Personal, Order Desk.** (The Knowledge Base lives inside the Library panel — open **Library** and pick its Knowledge Base list; there is no separate icon-bar button for it.) Every module has a colourful emoji icon — Agenda, Clients, Sales, To-Do, Calendar, Email, Messages, Library, Dashboards, Quotas, Marketing, Service, Inventory, Projects, Financials, Work Orders, Partners, Agreements, Compliance & SLA, HR & Payroll, Personal, Order Desk. Click a module to open it in the main area; the active module is highlighted. Modules that are not part of your current plan are dimmed with a tooltip that says so (Chapter 13).

Modules still in beta review are dimmed too. While TechieCRM is reviewing a new module before release, it stays on the bar (in the cloud portal, in the sidebar) but is greyed with a tooltip naming it — *"Notes is in beta testing — you need the beta tester role to open it. Ask TechieCRM support."* The entry is never hidden: clicking it opens the page that explains what beta review is and how to join, so you can always see what the product contains and ask for access. If you are a beta tester, none of this appears — every module you can open looks completely ordinary. The same mark appears on any action that leads into one of those modules, such as the cloud Dashboard's **Quick Actions** buttons, so a button never takes you to a refusal you had no warning about.

Size and position are set in **Setup ▸ Settings ▸ Shortcuts**, under **Icon Bar Properties** — not on the bar itself; there is no right-click menu on the icon bar. In that group the **small/large** button (it reads **Enlarge** when the bar is small and **Reduce** when it is large) switches between the two layouts — the wide bar with the module names beside each icon, and the narrow bar that shows the icons only; the

show/hide button (**Hide** / **Show**) hides the bar and brings it back; and the **Docked Left / Floating / Docked Right** radio buttons move it — **Floating** frees the bar to be dragged and resized anywhere inside the application window. The **Recent Entries** tickbox in the same group shows or hides the recently-opened-records list on the bar. On a brand-new sign-in the tickbox starts **ticked**, which is what the bar itself does — the recently-opened list is on until you turn it off.

Settings opens on your very first sign-in (September 2026). Until this was fixed, opening **Setup ▸ Settings** during your first session — before anything had been saved about your window layout, which is the state every new user is in — did nothing at all: no window appeared and no message explained why, however many times you clicked. It cleared itself once you had quit and started TechieCRM again, so it only ever affected the first session and went unnoticed for a long time. Nothing you need to do; Settings now opens the first time you ask for it.

Hiding a bar now lasts (September 2026). Hiding the **calendar control bar** — from **Settings ▸ show/hide** or from your name at the top right ▸ **Calendar Control Bar** — used to be forgotten the next time you started TechieCRM: the bar came back every launch. Both bars now reappear exactly as you left them. If you have never touched either setting, nothing changes; you get both bars, as before.

The bar follows your text size. The bar is not sized on its own — it grows and shrinks with **Setup ▸ Settings ▸ Font Style ▸ Font Size** (and with your computer's own text-size setting, where it has one), so the module names always have room and the icons stay in proportion. Change the font size and the bar re-draws immediately, wide layout or narrow; there is nothing to restart, and there is deliberately no separate size control for the bar. The wide bar is 162 pixels at the standard text size and about 186 at **Large**; the narrow bar is always exactly one icon wide. The only label that does not fit the wide bar is **Compliance & SLA** — at every text size, including the standard one — so hover it to read the full name. See Appendix A5 for the whole size story.

You can also drag the bar by its title area: drop it on the left or right side of the application window to dock it there, or drag it all the way to the edge of a monitor to dock it full-height against that screen edge. Screen-edge docking applies immediately but is **not remembered** — the next time you start TechieCRM the bar returns to the left dock. Dock positions chosen in Settings are remembered.

If you drag the bar onto the side where the calendar bar is already docked, the two share that side as **tabs**, with a tab strip along the bottom for switching between them, rather than splitting the space.

The ribbon

At the **top-left corner**, set over the ribbon, is the **TechieCRM application icon button** — the transparent TechieCRM logo, sitting half over the tab row and half down over the ribbon sections (the first section of every tab curves its top-left border around the icon's edge). Clicking it opens the **application menu**: **Open Database…** (sign in to another database), **Create Mongo Database…** (creates a new local TechieCRM Mongo database with you as its first user, then offers to import records into it — see A8), **Sign in as a different user…**, **Import/Export/Transfer ▸** (**Import from CSV / Excel…** — the mapping wizard, A8; Export to Excel / Advanced Export), **Administrator**, **Help ▸** (**User Manual (PDF)** — this manual, bundled with the app; **Online Documentation** — the knowledge base at www.techiecrm.com; **About TechieCRM**) and **Exit**. Beside the icon, in the band space before the centred tabs, lives the **Quick Shortcuts** strip — small one-click buttons you choose yourself. **Right-click the strip or any shortcut** to open its menu: right-click a shortcut and the menu leads with **Remove**; tick commands on and off directly in the list; **More Commands…** opens the full **Customize Quick Shortcuts** editor: a **Choose commands from** picker (the Icon Bar and every ribbon tab — Home, Edit, View, Search, Tools, Reports, Setup, Custom Actions), the available **Commands** on the left, **Add → / ← Remove**, your chosen shortcuts on the right with **Move Up / Move Down** ordering (that order is the strip order), and **Reset to defaults**. Any icon-bar module or ribbon command can become a shortcut. **Export to Excel** opens a preview dialog: the first 5 records to be exported over your current column setup, each column with an **Include** tick (untick to drop it, or tick a hidden column to add it — the advanced part), an **Export field headers** toggle, and an **Export** picker (Selected records / Showing list). Set **Where** and **Save As** at the bottom and click **Save** — clicking Save as-is is the simple path. Your shortcuts — including their order — are **remembered on this computer** as soon as you set them, and they also **follow you between the desktop and the web** like your theme once this computer is connected. If you change them while the connection is down they are still kept, and they travel up the next time it is back. (To collapse the ribbon itself, use the pin at the top-right corner of the ribbon — see below.)

At the top-right corner of the ribbon itself — on its first row of buttons, hard against the right edge, the same place as in the cloud CRM — is the **pin** (when pinned = ribbon always open; when unpinned = only the tab row shows and clicking a tab pops the ribbon open until you use a button, click elsewhere, press Esc or click the tab again; while the ribbon is collapsed the pin is out of sight with it; remembered per user). At the top-right of the ribbon's tab row is the **signed-in user menu** — your display name ▾ → **My Profile** (your User Properties), **Change Password…** (changes the database sign-in password TechieCRM uses for your login in SQL Server and MongoDB where applicable), **Sign out (switch user)…** (the same switch-user flow as the application menu's *Sign in as a different user…* — re-opens the sign-in window on this session; cancelling it keeps you signed in as you are). Same menu as the cloud portal's user drop-down.

Tabs **Home / Edit / View / Search / Tools / Reports / Setup / Custom Actions** — the same tabs, groups and captions as your source CRM's ribbon, rebuilt for whichever module is active (open Sales and the ribbon becomes the Sales ribbon; buttons the source CRM greys in a module are greyed here too). The tab row uses TechieCRM's rounded-top-corner tab style (the same look as the Settings dialog's tabs): the active tab is lit, the others are dimmed until you hover. Large buttons and small three-to-a-column buttons follow the source CRM's mix; a ▾ caption opens a drop-down; toggle buttons stay highlighted while on. **Every button does something** — real actions where TechieCRM has the feature, and a one-line explanation for the few legacy-CRM features not carried over (macros, Crystal Reports, OLE hooks, Outlook sync…). Appendix 6 lists every tab/group/button per module.

The tabs at a glance (Clients shown; other modules swap the Create/Filter/Search-by groups):

- **Home** — Create (Client Entry ▾ Company/Individual/Contact/User, Ticket, Sale, Project, Agreement, Work Order) · Write (Email, Note, Letter, Fax, Document) · Text (SMS) · Phone (Make / Receive a Call → logs a Phone Call note) · Schedule (Meeting, Task, Phone Call, Project Plan) · Insert / Print · Track ▸ Time a Task (stopwatch, save as note) · Subscribe.
- **Edit** — Entry (Open, Delete, Duplicate) · List (Make List Current, Invert Selection, Select All, Deselect All, Select Entry — these drive the record-list checkbox marks) · Replace ▸ Global Edit · Relate & Convert · Links (Copy Link puts a `techiecrm://client/…` link on the clipboard; Paste Link opens it).
- **View** — Filter (Clear List, Last Session List, Entry Templates, My/All/Company/Contact Leads, All Entries, Companies, Individuals, Contacts, Users — login users + your organization row only) · Favorite Lists (All Lists, Recent, Add to List, Remove From List) · Logging (Phone Log, Activities) · Show (Organization Chart, Properties, Map, Website) · Availability · Window (Switch Window ▾ — every module, Refresh, Sort By ▾ — the list's columns).
- **Search** — Options (Undo Search, Clear Undo, Repeat All Fields, Show All) · Catalog (Search Catalog, Recent Catalog Searches ▾) · Search By (All Fields, Company, Last Name, All Phone Numbers, All Email Addresses, Other Fields ▾ — every system field and user-defined field) · Retrieve (Sales, Tickets, Partners, Companies, Contacts) · Validation ▸ Check Duplicate · Web. See Chapter 20.
- **Tools** — Internet · Macro · Office (Export to Excel — CSV of the current list; Advanced Export — all columns; Sync with Outlook; Open Word) · Other (TechieCRM Editor, Graphing, Phone, Timer, Wizard, World Clock, Active OLE Hooks) · **Cloud** (Cloud Connection, Sync Now, Backup Now, Web Portal).
- **Reports** — Personal (Journal, Expenses, Phone ▾, Quota Report) · Crystal Report ▾ · Clients ▾ / Contacts ▾ / Related Entries ▾ (Column Report = print preview of the list; Detailed Report = the selected entry) · Sales ▾ (incl. Sales Pipeline / Funnel) · Marketing ▾ · Service ▾ / Knowledge Base ▾ · Associated Entries (Notes, Documents, UDFs) · Activities (Calendar ▾, To-Do List ▾, Activities) · Dashboards (Dashboards, Financials, HR & Payroll).

- **Setup** — File Management (Document Administration ▾, Template Library ▾) · Templates (Entry Template, Note Template — chapter 28) · Territory · Preferences (Settings) · User-Defined Fields (Set Up UDF) · User Management (Manage Users, Security Groups, Teams) · Display (Column Setup, Coloring Rule) · Workspace (Custom Actions, Icon Bar → Settings ▸ Theme Layout, Window ▾ → Classic / Stacked / Outlook / Floating layouts) · Administration (Administrator, Database → Settings ▸ Database, Licensing, Diagnostics → Settings ▸ Diagnostics).
- **Custom Actions** — Dashboards · TechieCRM (Web Portal, Messages, Notifications, Manage Custom Actions).

Module ribbons: **Calendar** (Meeting; Manage Meeting; Legend; Options — Other User's Calendar, Tasks / Users ▾, Carry Forward, Daily / Weekly / Weekly List / Monthly, Go to Today, Go to Calendar Date), **Service** (Process — Resolve / Assign / Escalate / Monitor Ticket; Filter — My Tickets, All Tickets, Status Filter ▾, My Current Tickets, Ticket Queue, Overdue; Search By — Basic Fields, Ticket #, Owner, Creator, Notes, Last Modified), **To-Do List** (Task; Manage Activity — Reassign, Mark as Completed, Set Priority; Filter — Show Meetings, Carry Forward, Today's … Next Week's Tasks, Build To-Do List), **Sales** (Ticket, Sale, Quote, Invoice; Process ▸ Monitor Sale; Filter — All / Current / Team Updated / Won / Lost; Analysis — Funnel, Pipeline; Search By — Company / Partner, Contact, Partner, Competitor, Status, Objective, Stage, Confidence Rating, Team, Leader), **Marketing** (Automated / Traditional; Review — Steps, Roles; Retrieve Client Entries), **Email** (Compose, Respond, Manage Email, date filters, Preview / Show Entry), **Library / Knowledge Base** (Article ▾, Folder, Paste Document, KB Article ▾; KB status filters; Search By File Name / Author / Creation Date / Text in Note / Last Modified; KB Any Field / Phrase), **Personal** (Journal Note, Expense; Date Range / Text in Note), **Quotas**, **Order Desk** (Order Desk ▾), **Dashboards** (designer: New, Properties, Add Indicator, Wizard, Email, Print, Full Screen), **My Work Day** (Choose Indicators, Dashboard Mode, Meetings / Tasks / Announcements) and the TechieCRM modules — **Inventory, Projects (incl. Gantt), Financials (incl. Aging), Work Orders (Dispatch — Assign, Set Status ▾), Partners, Agreements (Agreement; Generate Due; Pause / Resume / Cancel), Compliance & SLA (Requirement, SLA Policy, Compliance Record, Evaluate SLAs; SLA Board / Partner Compliance / Expiry Board), HR & Payroll (Employee, Time Entry, Leave Request, Pay Run; Employees / Time / Leave / Payroll), Messages** — each with Create, Filter and Search By groups over its own list.

The words TechieCRM uses

The buttons use one word per thing, all the way through — the same word on the ribbon, in the right-click menus, on the panels and in this manual. Where you see two words for something that sounds similar, they really are two different things:

One word	It always means
Entry	Any row you can open in any list.
Client	A company, individual or contact you do business with. **Company**, **Individual** and **Contact** are the three kinds of client entry; a **Partner** is a company flagged as one; a **Vendor** is a company you buy from.
Ticket	A support request (Service).
Sale	A revenue opportunity. A **Quote** is the priced offer you make before there is a sale.
Marketing	A marketing programme and everything belonging to it.
Task	One item of work. The **To-Do List** is the list those tasks sit on.
Meeting	A diarised event with people.
Note	Text you type onto an entry. A **Document** is a file; an **Article** is a Library or Knowledge Base item.

Agreement	A repeating service commitment.
Template	A reusable starting point — Entry Template, Note Template, Project Plan Library.
Delete	Destroys the record. **Remove** takes it out of a list and the record survives; **Clear** empties a list or resets a setting and destroys nothing.
Open	Opens the entry in its own window. **Show** turns something on or off inside the view you are already on; **View in Clients** jumps you to another module carrying the entry with you.
Search	Runs a query and replaces the list with the result. **Filter** narrows what is already on screen; **Retrieve** pulls in the entries *related* to the one you are on.
Create	Makes a new thing (the buttons under a **Create** group are just the thing's name). **Add to** puts an existing thing into a list.

Record lists — the guide

Every module list looks and behaves the same: | Element | What it does | |---|---| | **Status icon** (first column) | Coloured icon for the record's state (e.g. active/paused, overdue, breached). The whole row is tinted the same colour. | | **Column headers** | One uniform bold header bar in every list (same height everywhere). Click to sort; numbers, money and dates sort as numbers. Drag borders to resize. | | **Filter toolbar** | Module-specific filters (status, type, date) plus **New**, **Column Setup**, **Refresh**, **Settings**, **Close** at the right. | | **Double-click** | Opens the record's detail dialog. | | **Keyboard** | On the **Clients**, **Related** and **Interactions** lists: **↑ / ↓** move to the previous / next record (exactly as if you had clicked it, so the panels below follow), and **Enter** opens the highlighted record — the same as double-clicking. **F5** refreshes everything on screen. On the other module lists ↑ / ↓ move the row in the ordinary way; Enter is not wired there yet, so use double-click or right-click ▸ Open. See Chapter 3. | | **Right-click** | Context menu — Open at the top, then module actions (New, status changes, Refresh). Empty-area right-click offers Add/New. | | **Selection** | Two independent things. The **current** row — the one you last clicked — is outlined, and it is what drives the panels below. **Selected** rows are a separate multi-row set shown as a peach fill: click the first column's icon cell to select a row, click the header's master box to select or clear them all, or right-click a row ▸ **Select** (the item reads **Unselect** when the row is already selected). Every record list works this way — Clients, Related, Interactions, Sales, Service, To-Do, Marketing, Projects, Inventory, Partners, Work Orders, Agreements, Compliance & SLA, Financials, HR & Payroll, Personal, Quotas and Order Desk (Order Desk's own list has no rows to select yet — it is not connected to the database). Ribbon **Edit ▸ List** (Select All, De-select All, Invert Selection, Select Entry) acts on the same set. | | **Lists without multi-select** | The **Knowledge Base** article list uses ordinary click / Shift-click / ⌘-click selection instead of the record-list mark layer. |

> **Cloud CRM (31 Aug 2026):** right-click now works in the web portal's record lists too — on a row and on the empty space below the last row — on the Clients list and on the Related and Interactions panels of every module workspace. On a tablet, press and hold instead. The items are the desktop's, in the desktop's order; the ones that are not built on the web yet say so when you choose them rather than doing nothing. See Chapter 3.

Icons — one symbol per function. Toolbar and menu icons are system emoji, and the same function always uses the same symbol everywhere in TechieCRM: Settings (every panel's corner gear and Setup ▸ Preferences), Column Setup, Refresh, Close, Search/Find, Print, Delete, Email, Save, Add, Note, Meeting, Task. Record **status** icons in the first list column keep their colour-coded meaning and are not part of this set.

Layouts and floating panels

Settings ▸ Theme Layout ▸ Content Panels chooses **Classic** (Clients top, Related + Interactions below), **Stacked**, **Outlook** (Clients left) or **Floating**. In Floating you drag and resize panels freely; the lock icon in a title bar locks all panels (they then snap to the edges and resize proportionally). Any module panel can be **popped out** to its own window from its title bar and docked back. Positions and sizes are remembered per user, and so is whether a panel is shown or hidden.

Fixed (3 Sept 2026): in Floating layout, a normal quit could silently mark the Clients, Related or Notes panel as hidden even though nobody had hidden it — the shown/hidden flag was being written from whether the panel happened to be on screen at the exact instant the app closed, which is always "no." The next launch then faithfully restored it hidden, and the state persisted through every launch after that until someone noticed a panel was missing and re-opened it. A normal quit no longer does this; explicitly hiding a panel is still remembered as hidden. If a panel is already missing from an earlier launch, re-show it once from its layout controls — no re-hide/re-show loop is needed after that.

Master-detail

Selecting a record in **Clients, Sales, Service, Marketing or Projects** makes the Related and Interactions panels follow it: Related shows the record's contacts/members, Interactions shows its history. Closing a module returns Clients to the top slot.

Interactions — the unified timeline

The Interactions panel lists, newest first, everything attached to the current record: **Notes, Documents, Tasks, Meetings (formerly Appointments), Emails, Sales, Service, Marketing, Inventory, Work Orders, Agreements, Communications (texts + emails sent through the cloud), Projects, Quotes, Invoices, Quotas.** Use the **type dropdown** to show one type, tick *Show all* to include closed items, and double-click any row to open it in its own dialog. Right-click ▸ **Add** creates a new item of any type for the record.

Double-click opens every type (September 2026). Until now a small number of rows opened nothing at all when double-clicked, depending on which panel layout you were in: Notes opened, and **Documents, Tasks, Meetings and Emails** simply did nothing. Every type on the list above now opens its own dialog from a double-click, from every layout.

Settings

Setup ▸ Settings — fifteen tabs: **General** (the TechieCRM logo, plus a **Project Templates…** button), **Agenda & To-Dos**, **Theme Layout** (Theme System/Light/Dark — Light turns the whole interface light, Dark keeps the dark-grey look; only colours change between them, never text size or spacing — plus the primary and accent colours, the panel layout picker, and the icon bar / calendar control bar docking that used to live on a Shortcuts tab), **Font Style**, **Service**, **Calendar**, **Email** (your own email accounts — Chapter 12), **Meeting Notes**, **Database** (connections, sync status and **Backups**), **Marketing**, **Diagnostics** (per-module diagnostic logging for support — Appendix A5), **Orders & Inventory** (Inventory's Set Up Inventory Types…), **Agreements & SLA** (SLA Policies…, Compliance Requirements…, Agreement Templates…), **HR & Payroll** (HR Setup…) and **Connect** (TechieCRM Connect's remote-support preferences — Chapter 27). Each module's toolbar ⚙ button opens Settings on that module's page; where a module has no settings of its own, its toolbar simply has no ⚙ button at all — except Sales, Work Orders and the three workspace panels (Clients, Related, Interactions), which (for now) keep a ⚙ that says so plainly instead of opening someone else's page, and, as of September 2026, also tells you *which* Settings pages do govern that module (Theme Layout, Font Style and Database), so it points somewhere useful instead of stopping the conversation. See Appendix A5.

Fixed in the September 2026 update. Two things about that ⚙ and about Dark:

- the ⚙ on **Clients**, **Related** and **Interactions** used to do *nothing at all* — no window, no message, no error. All three now give the plain notice described in Appendix A5;
- the **record lists** on those same three panels used to stay white in Dark, so choosing Dark gave you a dark window wrapped around three bright-white lists. They now follow the theme like everything else — dark cards on a dark background — and they follow it *while you are looking at them*, without restarting TechieCRM. Nothing about the size or spacing of a row changes when you switch: a theme change is a colour change and nothing else.

Chapter 3 — Clients

Cloud CRM (Aug 2026): the web portal's **Clients** page now uses the same Classic layout as the desktop: the Clients list on top (Companies, Individuals, Contacts and the workspace's Users — same type icons and colours; filter pills, quick search, sortable columns), with **Related** (the selected entry's contacts) and **Interactions** (its notes, documents, tasks, meetings (formerly called Appointments in the source CRM), emails, sales and cases, with the type drop-down) below. Click a row to drive the lower panels; double-click opens the record; drag the bars between panels to resize (remembered). Very large databases show the first 500 entries with a notice — use Quick Search or the filter pills to narrow the list. The ribbon acts on the selected entry: Client Entry ▾ Company/Individual/Contact, Open, Delete, and Note/Email/To-do/Meeting/etc. open pre-filled for it.

Source-CRM equivalent: Address Book. TechieCRM renamed it **Clients**; companies, individuals and their contacts are the same records.

The **Interactions** panel is the entry's full history in date order: its own notes, documents, e-mails, meetings and to-dos, its sales, tickets, projects, invoices and the rest — **and the notes, meetings and to-dos that belong to those sales and tickets**, so nothing that happened for this client is hidden one level down. Rows that came from a sale or a ticket are labelled with it (*"· Ticket #12"*); see Chapter 4.

In this chapter

- The Clients list and Related entries
- The client dialog: tabs and toolbar
- Key fields, phone/email labels, addresses
- Favorite lists
- Set Up User-Defined Fields
- Activities for an entry
- Right-click actions (create, add, message, plan)

The list

Companies and individuals in the top panel; the selected entry's **contacts** in **Related**. Users appear under your own organization row (open one for User Properties; View ▸ Filter ▸ Users shows only them with the *Users column setup — Appendix 3). Column setups, sorting and the search-by-field dialog work as in the source CRM. If Related can't load a client's contacts (a connection hiccup), it shows an empty list and a "Failed to load the related contacts" message rather than leaving the previously-selected client's contacts on screen.

The panel toolbars (September 2026). Clients, Related and Interactions each carry the standard button cluster on the right of their title strip — **Refresh**, ⚙ **Settings**, **Close**. The ⚙ used to do nothing at all: no window, no message, no error. It now tells you plainly that these three panels have no Settings page of their own yet, and names the three pages that *do* govern them (Theme Layout, Font Style, Database) — see Appendix A5.

Refresh and Close now work (September 2026). Every button on those three title strips does something; until this release ten of them were on screen, looked enabled and did nothing at all when clicked.

Button	Panel	What it does
Refresh	Clients	Re-reads the client list from the database using the Column Setup you are looking at and your saved sort. Same as ribbon **View ▸ Refresh** or **F5**, but for this one list.

Refresh	Related	Re-reads the contacts of the currently selected client.
Refresh	Interactions	Re-reads the notes, documents, tasks, appointments and emails for the current client or contact.
Close	any of the three	**Hides** that panel. Nothing is deleted and no record is closed. To bring it back, click **Clients** in the icon bar — the button's tooltip says so.

If a Refresh cannot reach the database it leaves the rows already on screen alone and logs the problem rather than emptying the list.

The ↑ / ↓ arrow buttons are gone (September 2026). Related and Interactions each carried a pair of small up/down arrow buttons on their title strip. They have been **removed**: nobody used them, and your keyboard already does the job better. See *Moving through a list with the keyboard*, next.

Moving through a list with the keyboard

Click any row in **Clients**, **Related** or **Interactions**, then:

Key	What it does
↓	Moves to the **next** record in that list.
↑	Moves to the **previous** record.
Enter	**Opens** the highlighted record — exactly the same as double-clicking it.
Shift + ↑ / ↓	In Clients, extends the selection a row at a time (unchanged).
F5	Refreshes everything on screen — the same as ribbon **View ▸ Refresh**.

Moving with ↑ / ↓ behaves exactly as if you had clicked the row you land on, so the panels below follow along: stepping through **Clients** re-loads Related and Interactions for each client, and stepping through **Related** re-loads Interactions for each contact. The keys **stop at the first and last row** rather than wrapping round, and they **skip rows a filter is hiding**.

Typing an ordinary letter in the **Clients** list still jumps to the first entry starting with that letter (type-ahead), as before; Enter is no longer swallowed by it.

These three lists follow the theme (September 2026). Choosing **Dark** in Settings ▸ Theme Layout used to leave the Clients, Related and Interactions lists bright white inside an otherwise dark window. They now render as dark record cards on the dark background, and they change *while you watch* — you no longer have to restart TechieCRM for the switch to reach them. Row heights, spacing and text size are identical in both themes; only the colours move. Hovering and selecting a row keep the same orange and peach highlights in both themes, so a selected row looks the same wherever you work.

The client dialog

Open (double-click) or **Add Client**. Tabs: | Tab | Contents | |---|---| | **Basic** | Name/Address (company name above department/division), phones (up to four, each with a **label** you can change by double-clicking), emails/website, **key fields** (your saved key-field setup, remembered per user; single-select = dropdown, multi-select = the native table-field picker), Full/Read access. | | **User-Defined Fields** | Every UDF folder for the entry; edit in place. | | **Activities** | Tasks and meetings for the entry — add, modify (double-click), delete, print. | | **Notes / Documents** | Via Interactions. |

Right-click a client for **Record meeting notes…** — records the meeting, transcribes it and summarizes it onto the client's Interactions. See Chapter 26. Toolbar: **OK / Apply / Cancel**, **Favorite List ▾**, **Actions ▾**, **Print (Detailed Report)**. Fields use placeholder text instead of labels; combos open when you click anywhere on them; city / province / country autofill as you type.

Address… (on the Basic tab, beside the address lines) opens the client's **mailing addresses** — its main address plus any **alternate addresses**. Add, change or delete an alternate address there, and choose which one is the currently selected mailing address; the address lines on the Basic tab then show your choice. Alternate addresses live here and nowhere else — they are not rows in the Clients list (see "Alternate addresses are no longer in the list" later in this chapter). The button asks you to save first on a brand-new record, because an address has to belong to something.

Saving a new company or individual is all-or-nothing. The new record and the sequence number it consumes from the source CRM's counter are written together; if the save fails, the message says so and nothing is written — simply try again. Two users saving at the same moment are queued, not collided.

Cloud CRM (Aug 2026): the web portal's client create/edit form now has a **Category** field (free text, in the Basic Information card near Website). It reads and writes the same Category the source CRM stores on the client — most visibly, it's how a client becomes a Partner: set Category to "Partner" and the client appears in the Partners workspace.

Cloud CRM (31 Aug 2026) — what the web form saves. Three things it collected but did not store now do:

- a **phone extension** is kept with its number and comes back in its own Ext box when you re-open the client;
- **Email 2** and **Email 3** are kept (as user-defined fields, exactly as the desktop keeps them), so they come back when you edit the client;
- **Position** (the job title) is stored on its own and can no longer be wiped by another box.

Two boxes have been **removed** from the web form because there is nowhere in the cloud record to put them, so whatever you typed was thrown away when you pressed Save: the **Title (Mr./Ms./Dr.)** box and the **Division** box. Both remain on the desktop client dialog, which stores them; use the desktop for those two fields until the cloud record can carry them. Position and Department are unaffected.

Update (6 Sep 2026): the cloud record can now carry Division. The shared client record gained a Division field, so the box can come back to the web form. Until it does, keep entering Division on the desktop — nothing you have already typed there was lost, and it now travels to the web and mobile apps. **Title (Mr./Ms./Dr.) is unchanged and still desktop-only.**

What travels with a client to the web and mobile apps (6 Sep 2026)

Four things the desktop has always held on a client record, and no other app could see, now travel with it:

On the client	What it is	Notes
Website	The client's web address	Kept as a user-defined field ("Web Site"), the same way Email 2 and Email 3 are. **5,529 clients in a typical database already have one** — it was stored all along, it simply never reached the web or mobile apps. Nothing to re-enter.
Division	The sub-unit under the company — e.g. *"Transportation Division"*, *"Dunnery Best Team"*	Shown under company name and department on the Basic tab.
Lead status	Whether the source CRM flags the entry as a lead	Carried as the source CRM's own code. TechieCRM does not rename it, because the source publishes no names for it — the only meaning it defines is *lead / not a lead*.

Territory status	The source CRM's territory code	A **different field** from the Territory name, and also carried as the source code, for the same reason.

And one that is deliberately for information only — the access level. Each client record carries the source CRM's *read privilege level* code. TechieCRM shows it as it was recorded and **does nothing with it**: it does not hide records, does not grey out buttons, and does not stop anybody opening anything. Treat it as a label describing how the record is set up in the source CRM, not as a lock.

Why it is only a label. Anything a device is *given* is something the device could be made to ignore. A copy of your CRM on a laptop or a phone is a file on that machine; a "you may not read this" marker sitting in the same file as the record it marks protects nothing. Where records genuinely must be kept from someone, TechieCRM does not send them to that person's device at all — the restriction is applied by the server before anything leaves it. If you need a record kept from a user, set that up in **Users & Security**; do not rely on the access level shown on the client.

Cloud CRM (31 Aug 2026) — the web now opens a client dialog too

The web portal no longer has a separate client *page*. Clients open in the same kind of tabbed dialog the desktop uses, **over** the list, so you keep your place.

To open one, double-click the entry in the Clients list — or double-click any row in the **Related** panel, which opens *that* row (the company on the top row, or the individual contact you clicked). Pressing **Enter** on the selected row does the same. Any link to a client from elsewhere in the portal (a note, a sale, a ticket, a to-do, a meeting, a document) now lands on the Clients workspace with that client's dialog already open.

The tabs

Tab	What it does today
Basic Information	Everything you can edit: Name and Address, Other information (Category, Website, Assigned to, Private), Phone numbers (four, each with an extension and a label) and Email addresses. A contact shows the smaller contact set, plus the company it belongs to as a read-only box.
User-Defined Fields	The entry's user-defined values. **Editable** — see below.
Activities	The entry's to-dos and meetings, with the same six columns as the desktop. **Read-only for now**: click a row to open that to-do or meeting.

The buttons

- **OK** saves everything you changed and closes. **Apply** saves and stays open. **Cancel** closes; if you have unsaved changes it asks first, and offers **Save**, **Discard** or going back to the dialog — it never throws your typing away without asking.
- If a save cannot be made, the dialog **stays open and says why**. A required box that is empty is marked in place; a record that someone else deleted while you had it open gets a plain message saying nothing was saved. The dialog never closes on an error and never reports a save that did not happen.
- The toolbar carries **Send Email…**, **Send Text…** (the composers that used to be on the old client page, unchanged, including the recent-communications list) and **Delete…**, which asks for confirmation first.

Renaming a client and pressing OK updates the row in the list straight away — no page reload.

Add Client (the **+** button above the list) and the **Edit** links open the same tabs as a full page rather than a modal, which is also what you get if you turn JavaScript off.

Cloud CRM (31 Aug 2026) — editing User-Defined Fields on the web

The **User-Defined Fields** tab of the client dialog is now editable, with the same rules the desktop applies.

What you see. One row per field, `Field | Value(s)`, in name order. The box matches the field's type: a plain box for text, a number box, a date box, and a dropdown for a table field or a Yes/No field. Fields are per workspace and per entry type, so two customers never see the same list — and a field belonging to Sales or Service is never offered on a client.

Show blank fields (above the table) switches between every field and only the ones that have a value. It starts **on**, matching the desktop. With it off, the line beside it tells you how many fields are hidden, so an empty-looking tab is never a mystery.

To change a value, type or choose, then press **OK** or **Apply** — the same buttons that save the Basic tab. **Clearing a box removes the value from the entry** (it does not store a blank); that is how you delete a value from the web.

If something is wrong, nothing is saved. A number field given words, or a date given anything other than `YYYY-MM-DD`, is refused with the message beside that field, and *none* of the other fields in the tab are written either. That is deliberate — a half-saved tab would leave you unable to tell which half landed.

Why a field can say "Not synced — available on the desktop." Some user-defined fields are marked so their *values* never leave the source database — password and credential fields are, by name. Those fields are still listed here, so you can see the field exists, but they have no box: the cloud never received the value, and typing one here would create a value the desktop would then disagree with. Open the entry on the desktop to see or change it.

A value written on the web is stamped with the time you wrote it, which is what stops the next desktop synchronization from replacing it with an older copy.

A dropdown may offer a value that is not in the field's list. If the desktop stored a value the cloud's copy of the allowed list does not contain, that value is added to the dropdown as an extra option and stays selected. Without that, opening the tab and pressing OK would quietly replace it.

Creating or deleting user-defined *fields* (as opposed to their values) is not done here — that is a change to the workspace's setup and lives in **Setup ▸ User-Defined Fields**, which the tab links to if you are a workspace administrator.

Cloud CRM (31 Aug 2026) — Key Fields on the web

The **Key Fields** block at the foot of the Basic tab now shows your key-field summary, in the same **two columns** — left block and right block — that you arranged on the desktop. Titled separators appear as a heading and a rule, exactly as they do there. Each box shows the field's *name* until it has a value, and the value once it has one; hover a filled box to see which field it is.

Choosing a list. The **Key Fields for …** control above the block lists every key-field setup published for this kind of entry. Choose one and the block redraws. **Your choice follows you** — it is stored against your login, not your browser, so the same list is selected when you next open a client on the web, on the desktop, or on your phone. It is remembered separately for companies, individuals and contacts, because a company list on a contact would be the wrong list.

The block is **read-only on the web in this release**. User-defined values are edited on the **User-Defined Fields** tab. Some system fields shown here also have their own editable box on the Basic tab above — but not all of them do; a handful of system fields this block can display have no editable box anywhere on the web yet, and can currently only be changed on the desktop.

Two things a row may say instead of holding a value:

- **"Not carried in the cloud copy"** — the desktop's key-field list names a field the cloud record has no place for (Division is the common one). The row is still shown, so your list is not silently shorter than you built it.
- **"Not synced — available on the desktop"** — a user-defined field whose values deliberately

never leave the source database (see above).

If your workspace has never published a key-field list from the desktop, the block says so in words. Key-field lists are built on the desktop and sync to the cloud automatically; there is nothing to set up on the web.

Cloud CRM (31 Aug 2026) — the Activities tab on the web

The **Activities** tab lists the entry's to-dos and meetings together, newest first, under the desktop's own six columns: type, **Tasks and Meetings**, **Date**, **Time**, **Assigned to** and **Pr.** (priority). Click a row to open that to-do or meeting.

The filters, above the list:

- **Filter** — All dates, Today, Tomorrow, Yesterday, This Week, Next Week, This Month, Next Month. Weeks start on Monday. An item with no date shows under *All dates* only.
- **User** — *All users* (the default on the web) or *Show my activities*.
- **Show completed activities** and **Show meetings** — on by default. Turning *Show meetings* off leaves the to-dos.

The list shows at most the newest 200 to-dos and the newest 200 meetings; if there are more it says so, and the rest are in the **To-Do List** and the **Calendar**.

A meeting's **Time** is shown in the workspace's time zone. A to-do's Date is the day it is due, shown exactly as it was entered.

More ▸ Add Meeting opens the meeting form with this entry already attached, so the meeting appears on this tab (and on Interactions) as soon as it is saved. It is offered only on a saved record — while you are adding a new entry there is nothing yet to attach a meeting to.

Not built here yet: the **More ▸** menu's Add To-Do, Modify, Delete and Print say plainly that they are not connected on the web. Add and edit to-dos in the To-Do List; both are on the desktop's Activities tab today.

Adding a contact

A **contact** is a person at a company (or attached to an individual). Because a contact always belongs to a parent entry, TechieCRM asks which entry before it opens the form. There are three ways in, and all three end at the same **Add Contact** form:

Route	What happens
Home ▸ Client Entry ▾ ▸ Contact with a row selected	Opens Add Contact for that entry straight away.
Home ▸ Client Entry ▾ ▸ Contact with nothing selected	Opens **Add Contact**, which asks which entry the contact is for: type two letters to search your companies and individuals, or pick from the *Recently updated* list. Choosing one opens the form. Nothing is created until you save the form.
Right-click a client ▸ Create ▸ Contact, or **Add Contact** on the Related panel	Opens Add Contact for that entry.

If the workspace has no companies or individuals yet, the page says so and offers **Add a Company / Add an Individual** instead — a contact cannot be created before there is something for it to belong to.

The form holds **Last name** (required), First name, **Middle name**, Position, Department, two phone numbers with extensions, two e-mail addresses, and an address. Everything you type is saved and shown again when you re-open the contact; re-opening a contact and pressing **Save Contact** without typing changes nothing.

The saved contact appears immediately in the parent's **Related** panel and in the Clients list under the

Contacts filter pill.

The contact's number, its record and the parent entry's contact count are written together, so a failed save leaves the parent exactly as it was; two people adding a contact to the same entry at the same moment get consecutive numbers.

Favorite lists

Favorite List ▾ ▸ View Favorite Lists / Add to Favorite List / Remove from Favorite List on the client dialog toolbar — the same lists the source CRM uses (they show up there too). See Chapter 20. The Clients right-click **Add to / Remove from Favorite List** items and the ribbon **View ▸ Favorite Lists** group open the same dialog for the selected entry. **Add to Favorite List** replaces any existing membership of that list in one step — if the add cannot complete, the entry's existing membership is kept and the message says the list is unchanged.

Set Up User-Defined Fields

From the client dialog's **User-Defined Fields** tab (Set Up UDF): folders and fields per module (Clients, Sales, Service, Marketing, Users, Projects, Inventory types). Add Folder / Add Field / Properties / Items (table fields) / **Copy** (duplicate a field with its items) / Move Up-Down / Reset Order / Delete (system fields are protected). **Delete** removes the field — or a table-field item — together with every record's value for it, as one transaction: if it cannot complete, the field and its values are left intact and the message says nothing was deleted. **Set Up Inventory Types…** at the bottom opens the inventory type/custom-field editor (Chapter 6).

Right-click on a client

Open · Select · Delete | Create ▸ (Company / Individual / Contact / User) · Add ▸ (Note, File, Letter, Bill, Invoice, Inventory, Create a Sale..., Retrieve Sales, Create a Ticket..., Retrieve Tickets, Create a Project..., Retrieve Projects, Create an Agreement...) | Add to / Remove from Favorite List | Activities for this Entry · Phone Log · Phone ▸ (Make / Receive a Call) · Schedule ▸ (Call, Meeting, To-Do, Project Plan) | Send Email... · Send Text... · Time a To-Do · Export to Excel · Print ▸ (Print List, Print Details, Envelopes..., Labels..., Column Report...) | Properties.

- **Create a Sale… / Create a Ticket… / Create a Project…** open the Sales / Service / Projects dialog in new-record mode with this client (and contact) already filled in — the same dialogs the modules use.
- **Retrieve Sales / Tickets / Projects** open that module showing only this client's records. To retrieve for **several clients at once**, select them first the way every record list works (Chapter 2, "Selection"): click the first, icon column's cell on each client you want — the row fills peach — or right-click a row ▸ **Select**; the header's master box selects or clears them all. Then choose Retrieve, and it covers every selected client. With nothing selected it uses the **current** row (the one you last clicked). Ctrl-clicking rows does not build a set here — the ordinary click stays reserved for "the record I am looking at", so the peach selection is how you pick more than one. Export to Excel, Print and Make List Current read the same set.
- **Send Email…** uses your own email account and files a copy on the client (Chapter 12). **Send Text…** sends through the TechieCRM cloud (needs the SMS add-on).
- **Create an Agreement…** opens an agreement (Agreement) preset to this client (Chapter 10).
- **Phone Log** opens the entry's activities; **Make / Receive a Call** logs a Phone Call note; **Schedule ▸ Call** creates a To-Do; **Time a To-Do** opens the stopwatch (save as a note); **Export to Excel** writes the list to CSV; **Print List / Column Report** print-preview the list; **Print Details** prints the entry's detailed report.
- The same items appear on the Contacts panel right-click (for the contact's account).

Cloud CRM (31 Aug 2026) — right-click in the web portal

The web portal now has the same right-click menu, with the same items in the same order and the same words. It opens on the **Clients** list, on the **Related** panel, on the **Interactions** panel, and on the Related and Interactions panels of every other module's workspace. On a tablet or phone, **press and hold** for about a second instead of right-clicking.

It also opens on empty space. Right-click below the last row of the Related panel — the place the panel itself tells you to right-click when a client has no contacts yet — and the menu opens against the client selected above it, with **Create ▸ Contact** ready to use.

These items do the job on the web today:

Item	What it does on the web
Open	Opens the client dialog over the list.
Select / Unselect	Marks the row. The item says which way it will go.
Delete	Asks first, then deletes — the same page the ribbon's Delete uses.
Create ▸ Company / Individual	Opens the new-client form of that type.
Create ▸ Contact	Opens the Add Contact form for the selected client.
Create ▸ User	Opens Users with the Create User box open (workspace administrators only).
Add ▸ Note / File	Opens a new note or document already linked to the client.
Add ▸ Create a Sale… / Create a Ticket…	Opens a new sale or service ticket linked to the client.
Schedule ▸ Meeting / To-Do	Opens a new meeting or to-do linked to the client.
Send Email… / Send Text…	The same two composers the client dialog's toolbar opens.
Export to Excel	Saves the list as a CSV file. If you have marked rows with **Select**, only those are exported; otherwise the whole visible list is.

Everything else on the menu says "not connected yet" when you choose it — Letter, Bill, Invoice, Inventory, Retrieve Sales / Tickets / Projects, Create a Project…, Create an Agreement…, the two Favorite List items, Activities for this Entry, Phone Log, Phone ▸, Schedule ▸ Call and Project Plan, Record meeting notes…, Time a To-Do, Print ▸ and Properties. They are on the menu so the web and the desktop read the same, and they say so plainly rather than appearing to work. All of them work on the desktop; use it for those.

An item that cannot be used **right now** — Create ▸ Contact with nothing selected, for example — is greyed out and says why when you hover over it. It is never hidden, so the menu keeps the same shape every time you open it.

On a user row the menu is the shorter user menu: **Open (User Properties)**, **Message…** and **Add User…**. Opening a user's properties and adding a user are for workspace administrators; for anyone else those two are greyed out with the reason. The desktop's Org Chart, Enable / Disable Login, Change Password… and Preferences… are not on the web menu at all — they act on the source CRM's own user table, which the cloud portal does not have.

On the Interactions panel the menu is smaller: **Open**, the same **Add ▸** list, then **Delete** and **Properties**, which are not connected on the web yet.

Press **Esc**, click anywhere else, or scroll to close the menu.

Deleting a client, contact or user

Delete (right-click ▸ Delete, or the ribbon **Edit ▸ Delete Record**) removes the selected record — but never on its own. A client entry is the top of a small tree: its contacts, alternate addresses, notes, documents and filed e-mail, to-dos, meetings, sales, service tickets and projects all hang off it. Deleting the entry and leaving those behind would strand them on a record that no longer exists, so TechieCRM counts them first.

If nothing is attached, you get a plain "Delete “

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- @USER.OPP

- FP-00086

- FP-KB00042FP-KB00042 42FP-KB...

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Work order — <subject>

/partners/create/

python manage.py reconcile_partners --tenant <your-workspace> --apply

	1,15last
	3,9

/conversations/

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FP-KB00001

/knowledge-base/

FP-KB0004242

FP-KB... 42FP-KB00042

appleAppleAPPLE Apple Jones, apple Smith, banana Lee, Zebra CoApple Jones, Zebra Co, apple Smith, banana Lee Zebra Appleapple

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/dashboard/

/dashboard/

- $-50.00

/crm-reports/

- $1,234.50-$50.00

<report>-<date>.csv

.xlsx

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- 0,1,2,3,4
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pay by kind + commission + allowances - deductions -$50.00 CAD

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- messages_supervisors

Full_Access

HHI

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kb_articles

0.8.0 (2) · beta

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1.
2.
3. Reinstall from your Mac: ./bin/install-iphone.sh

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6D2P-62CU

connect.techiecrm.com

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	AMGR_Client_TblClient_Id = '@' + loginContact_Number = 0Record_Type = '5'Name = 'Default Entry'AMGR_User_Fields_TblClient_Id
	AMGR_Notes_TblClient_Id = '@' + login + '/ABNOTE'/CSNOTE/OPPNOTE/ CMPNOTEContact_Number = 0
	TCRM_TemplateAuditdocs/db/templates/01_schema.sql

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3.
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{Field?}

{First_Name?} {Last_Name?}
{Position?}
{Company?}
{Individual_Name_for_Contact?}
{Address_Line_1?}
{Address_Line_2?}
{City?} {State_Province?} {Zip?}
{Country?}
{Phone 1?}
{Email Address?}

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A1A 1A1 12345[-6789]

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ABUSE_*

TCRM_

db_owner

docs/db/...	
column_setup/01_schema.sql	
search/01_schema.sql	TCRM_SavedSearch
ap_ar/01_schema.sqlap_ar/ 02_financials_module.sql	
entrepreneur_dashboard/01_schema.sql	
inventory/01_schema.sql	
projects/01_schema.sql	Projects_View
work_orders/01_schema.sql	
partners/01_schema.sql	
maintenance_plans/ 01_schema.sqlmaintenance_plans/ 02_agreements.sql	
compliance_sla/01_schema.sql	

hr_payroll/01_schema.sql	
identity/01_schema.sql	TCRM_WorkspaceTCRM_IdentityLink

TCRM_Workspace

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- db_owner

```
python -m src.entrepreneur_dashboard_setup --verify    # show what is already there, change nothing
python -m src.entrepreneur_dashboard_setup --prep      # create the fields (safe to re-run)
```

DB_SERVERDB_NAMEDB_USERDB_PASSWORD --server / --database / --user / --password --teardown --confirm

mongodb://localhost:27017techiecrm MONGO_URLTCRM_LOCAL_DB

.env

CLOUD_API_URL	https://api.techiecrm.com/api/api
CLOUD_USER_EMAIL	
EMAIL_ENC_KEY	
MONGO_URLTCRM_LOCAL_DB	MONGO_URL
DB_SERVERDB_NAMEDB_USERDB_PASSWORD	python -m src.entrepreneur_dashboard_setup

features dev_mode=Truemain.py

.coding-team/followup_for_shannon.md

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main.pyadministrator.py

ADMN_Users

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MASTER MASTER

logs/app.log

- .json
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	N of M parts FAILED — <part>: <reason>_sync_state	

json/app_config.json"diagnostics"

logs/ debug.logapp.log errors.log

1.
2.
3.
4. debug.logerrors.log
5.

1.
2.

TECHIECRM_BASE_PT

TECHIECRM_BASE_PT TECHIECRM_BASE_PT=19.5

	~/.techiecrm/backups

src/ribbon_configs.pytools/gen_ribbon_reference.py
src/ribbon_configs.pyTechieCRM_live/core/ribbon_configs.py

docs/design/product_vocabulary.md
techiecrm://client/...

- assign_to_campaign
- camp_retrieve_activities
- camp_retrieve_clicked
- camp_retrieve_opened
- camp_retrieve_unsub
- camp_retrieve_unsuccessful
- camp_team_updated
- case_monitor
- combine_entries
- convert_contacts_partners
- convert_partners_companies
- create_invoice
- create_journal_note
- create_quote
- custom_actions
- custom_manage

- email_decode
- email_flag_clear
- email_flag_set
- email_mark_read
- email_mark_unread
- email_priority_high
- email_priority_low
- email_priority_normal
- email_save_client
- fin_new_bill
- fin_new_invoice
- lib_close
- lib_rename
- lib_save
- lib_save_as
- macro_list
- macro_record
- macro_run_last
- mailing_lists
- od_new_order
- od_new_quote
- od_open
- ole_hooks
- opp_monitor
- opp_team_updated
- peg_board
- relate_entries
- rpt_contacts_column
- rpt_contacts_detailed
- rpt_crystal
- rpt_related_column
- rpt_udfs
- sync_outlook
- template_campaign_auto
- template_campaign_trad
- template_email
- template_letters
- template_quota
- web_form

- wizard
- write_fax

tools/gen_icon_reference.py shared/theme/emoji_icons.py FUNCTION_ICONS

	settings					
	column_setupcolumns					
	refresh					
	delete					
	search					
	find					
	print					
	emailcompose_email					
	mailbox					
	savesave_as					
	closecancel					
	add					
	create					
	copy					
	actions					
	org_chart					
	spell_check					
	support					
	general					
	remove					
	editeditoredit_note					
	note_addadd_notenote					
	add_appointmentappointment_addmeeting					
	add_tasktaskchecklist					
	add_clientperson_add					
	add_contactgroup_addusersgroupgroups					
	add_case					
	add_opportunitymoney					

	add_documentattach_file					
	documentword					
	letterenvelope					
	fax					
	phonecall_made					
	call_received					
	smschat					
	link					
	campaign					
	cut					
	paste					
	undo					
	redo					
	merge					
	open					
	foldercreate_new_folder					
	info					
	help					
	map					
	web					
	lock					
	unlock					
	starstar_addstar_borderstar_half					
	flag					
	outlined_flag					
	alarm					
	timer					
	history					
	visibilitypreview					
	visibility_off					
	check_circlecheck_box					
	block					
	pause					

	playmacro					
	record					
	stop					
	meeting_notes					
	connect					
	screen_share					
	keyboard					
	diagnostics					
	file_transfer					
	unattended					
	tools					
	remote_control					
	summarize					
	skip_next					
	warning					
	priority_high					
	free_time					
	wizard					
	bookmark					
	image					
	taglabelcategory					
	handshake					
	business					
	person					
	action_planassignment					
	notifications					
	send					
	mail_merge					
	mailing_list					
	clear_all					
	import					
	export					
	download					

	arrow_down					
	arrow_right					
	arrow_left					
	pin					
	pin_drop					
	arrow_up					
	synccloudcloud_sync					
	calculator					
	world_clock					
	switch_windowwindow					
	key					
	security					
	admin					
	database					
	backup					
	palette					
	customize					
	pluginextension					
	scriptcode					
	bug_report					
	policy					
	work					
	build					
	badge					
	receiptexpenses					
	event_repeat					
	calendareventdate_range					
	dashboardchartbar_chartadd_chart					
	entrepreneur_dashboard					
	analyticstrending_up					
	reportassessment					

	clientsaddress_bookperson_search					
	contacts					
	notes					
	sales					
	service					
	marketing					
	todo					
	agenda					
	quotarequest_quote					
	projects					
	financials					
	work_orders					
	partners					
	agreements					
	complianceverified					
	hr					
	messages					
	personaljournal					
	kb					
	library					
	inventory					
	order_desk					

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1. .csv.xlsx
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   2026-01-1515-Jan-2026 January 15, 202601/15/202615/01/2026 01/02/2026

4.

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- -$50.00
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BC, AB, SK

	AMGR_Territory
	AMGR_Territory_Managers
	AMGR_Client_Tbl.Territory_IdTerritory_StatusAssigned_To
	TCRM_TerritoryRule
	TCRM_TerritoryAlignmentTCRM_TerritoryAlignmentItem

TCRM_ docs/db/territory/01_schema.sql

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