

TechieCRM User & Administrator Manual

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

30 User Guide chapters · 13 Administrator Guide chapters

Last updated October 15, 2026

TechieCRM 0.8.0.5 (stable)

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 real car's instrument cluster. Where a car tells you speed, fuel and engine load so you can drive safely, TechieCRM tells you sales pace, cash, workload and the exceptions that need a decision today, so you can run the business safely. It sits at the bottom of your Agenda, is also available as a native entry in the Dashboard module, 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

- The cluster at a glance
- Reading the gauges
- Warning lights
- The centre screen
- The boxes and the wings
- Changing what a section shows (Properties)
- Dashboard versions
- Opening the records behind an indicator
- Putting the dashboard on your desktop
- Driver view vs. fleet view
- Setting your targets (calibration)
- Company figures
- Where the numbers come from
- Preparing a database (administrators)

The cluster at a glance

The dashboard is drawn as a curved cluster with a bright rim. Everything outside the rim is see-through, so the panel behind shows through the corners and through the notch under the bottom row of lights. The cluster has fourteen **sections**, each holding one or more **indicators**. Every section has a name, which is the name you see in its right-click menu:

Section	Where	Holds by default
Left gauge	the big dial on the left	Sales vs quota: won sales this period against your quota
Right gauge	the big dial on the right	Cash flow: money in against money out this month
Left sub-gauge	the small dial inside the left gauge, C to H	Credit used (high is bad)
Right sub-gauge	the small dial inside the right gauge, E to F	Cash: bank balance against a healthy-cash reference
Top warning lights (row 1)	the upper strip under the hood	system and setup lights: CAL, DATE, LICENCE, BACKUP, SYNC,

		STOCK
Top warning lights (row 2)	the second strip	sales and work lights: LOST, BATTERY, MISSED, TASKS, TICKETS
Bottom warning lights	the red row under the centre screen	money lights: AR, AP, CASH, CREDIT, BILLS
Upper left box	left of the centre screen	Unread messages (not yet available; the box stays empty)
Upper right box	right of the centre screen	Overdue tasks (count)
Centre screen	the dark screen in the middle	seven groups of figures that cycle (see <i>The centre screen</i>)
Left side box	the far left	Meetings today (count)
Right side box	the far right	Out-of-stock items (count)
Left wing	the curved band at the lower left	Year to target: won revenue this year against your annual quota
Right wing	the curved band at the lower right	Service backlog: open tickets against the tickets seen in the last 30 days

Hover over any indicator to read its figure and what it means. **Click** an indicator to open the module and records behind it (the lights, the gauges and the centre-screen rows all open something). **Right-click** a section for its menu: open the records, change what the section shows (**Properties**, see *Changing what a section shows*), reset the section, refresh, pin the centre screen, copy every reading as text, switch the light labels, the digital readouts and the animations on or off, choose a **dashboard version**, reset the whole dashboard, and put the dashboard on your desktop.

Keyboard. Tab and Shift+Tab move between the sections; inside a row of lights the Left and Right arrows move between lights; Enter or Space opens the records behind the indicator; Shift+F10 or the Menu key opens the section's menu; on the centre screen, Up and Down step through the groups and P pins the screen.

Narrow panels. When the dashboard is narrower than about 720 pixels it draws **compact**: only the two big gauges, the two sub-gauges and the bottom row of lights. Everything comes back when there is room.

An indicator that is not shown. If a section would show an indicator you are not allowed to see (for example a company-money figure without Accounting read access), it is simply left out: no error and no placeholder. An indicator whose data source TechieCRM does not have yet is not drawn either, for the same reason a dark light means "checked, and fine" (see *Warning lights*).

Reading the gauges

Instrument	Reads as	What it tells you
Left gauge (Sales vs quota)	Won sales this period against your sales quota	The green marker is your quota (the speed limit). The red band from zero up to the amber mark is behind pace : the mark is where your sales should be this far into the period, so a needle inside the

		red band means you are behind for the period so far. A needle past the marker means you are ahead.
Right gauge (Cash flow)	Payments received minus bills paid this month	Zero is the middle of the dial; left of it more went out than came in. The tooltip gives the two figures. It reads SET UP until payments and bills are recorded in Financials.
Left sub-gauge (C to H)	Credit used against your credit limit (high is bad)	Running hot means no shock absorber left for a bad month.
Right sub-gauge (E to F)	Bank balance against a healthy-cash reference	How much runway is in the tank. Near E you cannot make payroll.

The two gauges that used to sit in the middle, **Work** (scheduled calendar items against your idle line and redline) and **Revenue against target**, are now rows on the centre screen (*Today* and *Pipeline*) and can be put back on a gauge through the section's Properties when that becomes available.

Runway, the days of operating money left at your current burn rate, is the readout at the top right of the centre screen, like a car's fuel range. It reads **0 to 180 days** with **90 days** as the comfortable floor, and only shows a figure once you have both a bank balance and a burn rate recorded.

The gauges show **SET UP** (no needle, dimmed dial) while their source is not populated, **NOT IN YOUR VIEW** when the figure is company money you may not see, and **Couldn't read** when the source could not be reached. When TechieCRM cannot refresh a reading, the last one stays on the dial, dimmed, and the tooltip says when it was read ("as of 10:42"). Nothing is invented.

By default the big gauges show no digital readout (hover for the figure); switch **Readouts on the big gauges** on in the right-click menu to print it under the hub.

Warning lights

Gauges are for trends you watch over time; the warning lights are for exceptions that need a decision **today**. The lights are car-style pictograms in three rows, each with a short label printed under it (switch **Light labels** off in the right-click menu to hide the labels). A light is a faint ghost until its condition applies, then it glows **amber** (look soon), **red** (act now) or **blue** (setup needed). Hover over a light for the sentence behind it, with the figures (for example "LOST: 2 sales lost this month, \$14,500"); hover over the row for every light that is lit, and "All clear" when none is. Click a light to open the records behind it; click the **CAL** light to open the **Set targets** window.

A ring with a question mark means the light could not be checked: TechieCRM could not read the records it watches (for example while you are not connected to the database). It is not a dark light, because a dark light means "checked, and fine". The tooltip says "Not checked".

If you are not allowed to see the company's money (see *Company figures*), the **CASH**, **CREDIT** and **BILLS** lights are drawn as a hollow, dashed ring instead of a light, and the tooltip says "Not in your view". A hollow ring is not a dark light: it means the light is not shown to you, not that all is well.

Lights on the dashboard now

These sixteen lights are built and working. The label is the text printed under the light; the row says which strip holds it by default.

Light	Colour	Meaning	Lit when
AR	Amber	Accounts receivable overdue (bottom row). This is the <i>oil-pressure</i> light:	At least one invoice owed to you is past its due date (Accounts Payable /

		cash is the oil	Receivable, Chapter 13)
AP	Red	Accounts payable overdue (bottom row)	At least one bill you owe is past its due date
CASH	Red	Cash is running low (bottom row)	Your bank balance is less than one month of your monthly burn. Needs both a bank balance and a monthly burn figure; without them the light stays dark
CREDIT	Amber	Credit line nearly used up (bottom row)	90% or more of your credit limit is in use
CAL	Blue	The dashboard is not calibrated (top row 1)	You have neither an income target (a sales quota or your Income Target field) nor a Planned Work minimum. Click it to open Set targets (see <i>Setting your targets</i>)
DATE	Amber	Revenue figures are partly approximate (top row 1)	Some or all won sales behind the revenue figures have no close date, so they are filed under the year they were opened. See <i>The centre screen</i>
LOST	Red	A deal was lost (top row 2)	At least one of your sales is marked Lost in the dashboard period. A lost sale is filed under its close date, or the date it was opened when it has none (the same rule Quotas uses). The tooltip gives the count and their total forecast revenue
MISSED	Amber	Meetings came and went without an outcome (top row 2)	At least one of your appointments ended in the last 14 days and is not marked complete
BATTERY	Amber	The pipeline is not being refilled (top row 2)	You created no new sales opportunity in the last 30 days
TASKS	Amber	Overdue tasks and follow-ups (top row 2)	At least one of your To-Do tasks is past its scheduled date and not complete
TICKETS	Amber	Service tickets need attention (top row 2)	An open service ticket has nobody assigned, or is past its deadline
BILLS	Amber	Bills due soon (bottom row)	An unpaid bill you owe is due within the next seven days
BACKUP	Amber	Backup overdue (top row 1)	The last cloud backup finished more than seven days ago. Stays dark until a first backup has run
SYNC	Amber	Cloud sync stalled (top row 1)	The last successful cloud sync was more than thirty minutes ago. Stays dark until a first sync has run
LICENCE	Amber	Licence or beta expiring (top row 1)	This beta build, or your licence, expires

			within fourteen days. The tooltip gives the days left
STOCK	Amber	Items out of stock (top row 1)	At least one inventory item the business owns has nothing left

Clearing the MISSED light. Open each meeting the tooltip counts (your calendar, the last 14 days) and mark it complete. A meeting that ended more than 14 days ago no longer counts, so one forgotten meeting cannot keep the light on for ever.

Lights that are coming

These lights are planned but **not on the dashboard yet**. They are left off the rows entirely, rather than drawn dark, because a dark light means "checked, and fine", and these are not being checked yet.

Light	What it will warn about	Where its reading will come from
Update available	A newer TechieCRM build exists	The version check the app already runs in the background. Until the dashboard can read that result without asking the licence server itself, the light is not drawn
Check engine	Something needs a look, not on fire	Open sales past their estimated close date. (Sales stuck in one stage, and a key client gone quiet, need data TechieCRM does not record yet)
Seatbelt	Exposure	Service agreements that have expired or are about to. (Unsigned quotes need a quote record TechieCRM does not have yet)
Capacity	Overload	Open service tickets assigned to you, against a capacity you set
Cruise control	Income on autopilot	The share of this period's revenue that comes from active service agreements

When a light moves from this table to the one above, this chapter says so.

The centre screen

The dark screen in the middle of the cluster works like the trip computer in a car. It shows:

- **Top left:** the letter of your Dashboard Period, **W, M, Q** or **Y** (week, month, quarter, year), like a gear indicator.
- **Top right:** your **Runway** in days, like a fuel range.
- **The title and up to four rows** of the group on show.
- **Bottom left:** whether TechieCRM is connected to its database ("Online" or "Not connected").
- **Bottom right:** your **lifetime revenue**, the odometer. It only goes up: milestones, tenure, proof of how far you have come.

The screen **cycles** through its groups every **15 seconds**. It pauses while your pointer is over it, and while a Set targets window is open. The up and down arrows at its right edge, the mouse wheel over it, and the Up and Down keys when it has the keyboard focus step through the groups (wrapping round at either end); any manual step restarts the 15 seconds. **Pin this screen** in the right-click menu (or the P key) stops the cycling until you unpin it; a PIN mark shows in the header while it is pinned. The dashed bar beside the arrows shows which group you are on. Clicking a row opens the records behind

that figure. The groups, their rows, the header and footer readouts and the seconds per group (5 to 120) are yours to change: right-click the screen and choose **Properties of Centre screen...** (see *Changing what a section shows*).

The seven default groups, in order:

Group	Rows	Car analogue
Trip Info	Revenue this week, this month, this quarter and this year: the trip meters, all at once so you can read momentum at every horizon	Accumulated Info
Pipeline	Open sales (count), Pipeline (the forecast revenue of every open sale), Sales vs quota (won this period), Win rate over the last 90 days (won against won plus lost)	Drive Info
Today	Meetings today, Tasks due today, Overdue tasks, Work (scheduled calendar items this period)	Drive Mode
Cash & Bills	AR outstanding, AR overdue (count), AP outstanding, AP overdue (count). Company money: shown only if you may see it	Fuel Economy
Service	Open tickets, Unassigned tickets, Tickets past deadline, Oldest open ticket (days)	Speed
Service Required	One line per warning light that is lit; "All clear" when none is	Service required
System Check	Cloud sync (when it last succeeded), Last backup, Licence or beta days left, Database connection	System Check

Which won sales count, and which date they are filed under. The Sales vs quota gauge, the trip meters and the odometer total the **Forecast revenue** of each **Won** sale that you own (see *Driver view* vs. *fleet view*), not its Actual revenue. Sales won before the September 2026 update carry \$0 as their Actual revenue whatever they sold for (Chapter 24 explains why), so the dashboard reads Forecast revenue for every sale rather than show those as \$0. 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"). That fallback answers a different question from "when did this close", so 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 an amber **DATE** light lights in the top row, and its tooltip says which year those figures are filed under. When every won sale is close-dated the light stays dark, so seeing it lit is the signal, not something to check for.

The boxes and the wings

- **Upper right box:** the number of your tasks past their scheduled date. The pictogram glows amber when the count is above zero.
- **Left side box:** appointments in your calendar today.
- **Right side box:** inventory items the business owns with nothing left; amber above zero.
- **Left wing** (Year to target): fills from the bottom as your won revenue this year approaches your annual sales quota. It reads SET UP until you have a quota (Quotas module).
- **Right wing** (Service backlog): how much of the last thirty days' ticket volume is still open (open tickets against open plus resolved in the last thirty days).

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/crm-reports/

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- \$1,234.50-\$50.00

<report>--<date>.csv

.xlsx

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0.8.0.2 (3) · beta 0.8.0

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- 1.
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4. Reinstall from your Mac: `./bin/install-iphone.sh`

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- `https`

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- Reinstall from your computer: `./gradlew installDebug`

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connect.techiecrm.com

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	AMGR_Client_TblClient_Id = '@' + loginContact_Number = ORecord_Type = '5'Name = 'Default Entry'AMGR_User_Fields_TblClient_Id
	AMGR_Notes_TblClient_Id = '@' + login + '/ABNOTE'/CSNOTE/OPPNOTE/CMPNOTEContact_Number = O
	TCRM_TemplateAuditdocs/db/templates/O1_schema.sql
	comm_templateschannelkinddocument{First Name?}comm_templateskinddocument
	AMGR_Letters_TblTable_Id = 17TextCol
	word_templatesword_templatesync_tombstones
	AMGR_Letters_TblTable_Id = 7.docx
	AMGR_Letters_TblTable_Id = 99DescriptionTextColOle_Doc_Type.html.txtPrivateOwner_IdReadPrivReadOnly_Id

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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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- /activity-log/

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	<name>.<date>.old	

- [illegible]



```
DbToolsStyle src/db_tools_ui/style.py CheckWindowRepairWindowScriptsWindowstyle=  
from src.db_tools_ui.check_window import CheckWindow  
from src.db_tools_ui.style import DbToolsStyle  
  
CheckWindow(parent, style=DbToolsStyle(accent="#3366CC", font_size_pt=11)).show()  
python -m src.db_tools_ui
```

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- validate

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```
winver systeminfo | findstr /B /C:"OS Name" /C:"OS Version"
```


```
-AllowUnsupportedOS--allow-unsupported-os
```

```
installer\install.ps1 installer/install.sh
```

- 1.
- 2.
- 3.
4. venv
5. .env .envTECHIECRM_TRUSTED_PROXY_COUNT=0.env
6. data data
7. manage.py check_services
- 8.
- 9.

```
.env
```

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	--allow-unsupported-os	

installer

C:\techiecrm-localportal	/opt/techiecrm-localportal	/opt/techiecrm-localportal

- `venv``venv`
- `manage.py``bin``installer` `localportal``portalengine`
- `data`

<install folder>

<install folder>C:\techiecrm-localportal	<install folder>/opt/techiecrm-localportal	<install folder>/opt/techiecrm-localportal
<install folder>\venv	<install folder>/venv	<install folder>/venv
<install folder>\.env	<install folder>/.env	<install folder>/.env
<install folder>\data	<install folder>/data	<install folder>/data
data\localportal.sqlite3	data/localportal.sqlite3	data/localportal.sqlite3
data\staticfiles	data/staticfiles	data/staticfiles
data\media	data/media	data/media
data\sync_state.json	data/sync_state.json	data/sync_state.json
	data/access.logdata/error.logdata/service.log	data/access.logdata/error.log
%APPDATA%	~/Library/Application	~/config/TechieCRM/

\TechieCRM\license.datC: \Users\<you>\AppData\Roaming\TechieCRM\license.dat	Support/TechieCRM/ license.dat	license.dat
C: \ProgramData\TechiecrmData		

```
.envls -a
TECHIECRM_LICENSE_DIR
mongodb://localhost:27017techiecrm dbPath
C:\ProgramData\TechieCRM techiecrm-local-db.jsonsync-owner.json
```

- 1.
2.
 -
 - MongoDB
 -
- 3.
4. C:\techiecrm-localportal

- 1.
2.
 - cd C:\techiecrm-localportal
 - powershell -ExecutionPolicy Bypass -File installer\install.ps1
3. ==>!!

py -3.13py -3.12python
venv
data

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4.

- 1.
2. `brew tap mongodb/brew && brew install mongodb-community && brew services start mongodb-community`
- 3.
4.
`sudo mkdir -p /opt/techiecrm-localportal`
`sudo chown "$USER" /opt/techiecrm-localportal`

1.
`cd /opt/techiecrm-localportal`
`installer/install.sh`
 2.
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 - `python3.13python3.12python3`
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 - 3.
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1. `venv python3.12-venv`
- 2.
3. `odbcinst`
4. `/opt/techiecrm-localportal`

`cd /opt/techiecrm-localportal`
`installer/install.sh`

`.env`

1. `.envnotepad .env`
2. `NAME=value#`

3. #MAX_SQL_PASSWORD='an example#value' \${

4. .env

.env

PORT		8000	PORT=8020
ALLOWED_HOSTS		localhost,127.0.0.1	ALLOWED_HOSTS=localhost,127.0.0.1,crm.example.lan
CSRF_TRUSTED_ORIGINS		PORThttp://localhost:<port>,http://127.0.0.1:<port>	CSRF_TRUSTED_ORIGINS=http://localhost:8020,http://127.0.0.1:8020
TECHIECRM_TRUSTED_PROXY_COUNT	X-Forwarded-For	0	TECHIECRM_TRUSTED_PROXY_COUNT=1
SITE_BASE_URL		http://127.0.0.1:8010	SITE_BASE_URL=http://localhost:8000
LOCALPORTAL_PUBLIC_SITE_URL		https://www.techiecrm.com	
SESSION_IDLE_SECONDS		900	SESSION_IDLE_SECONDS=1800

PORT CSRF_TRUSTED_ORIGINS.env PORT

TCRM_Session_*

MAX_SQL_SERVER	hosthost\INSTANCE host,port		MAX_SQL_SERVER=sql1.example.lan\CRM
MAX_SQL_DB			MAX_SQL_DB=Office CRM
MAX_SQL_USER			MAX_SQL_USER=techiecrm_reader
MAX_SQL_PASSWORD			MAX_SQL_PASSWORD='your password here'
MAX_SQL_DRIVER		ODBC Driver 18 for SQL Server	
MONGO_URL	mongodb://localhost:27017manage.py mongo_server --set		MONGO_URL=mongodb://db1.example.lan:27017

MONGO_DB		techiecrmTCRM_LOCAL_DB	MONGO_DB=techiecrm
TCRM_LOCAL_DB	MONGO_DB	techiecrm	
MONGO_HOSTMONGO_PORT	MONGO_URL	localhost27017	MONGO_PORT=27018
MONGO_SERVER_SELECTION_TIMEOUT_MS		7005000	MONGO_SERVER_SELECTION_TIMEOUT_MS=3000
LOCALPORTAL_PROBE_TIMEOUT_S		1.5	LOCALPORTAL_PROBE_TIMEOUT_S=3
LOCALPORTAL_MONGO_GUARD	0	1	
SINGLE_SESSION_MODE	offobserveenforce	off	SINGLE_SESSION_MODE=observe
LOCALPORTAL_SESSION_REGISTRY	cloudoffice_sqllocal_mongo		LOCALPORTAL_SESSION_REGISTRY=office_sql

TECHIECRM_LICENSE_DIR			TECHIECRM_LICENSE_DIR=C:\techiecrm-localportal\licence
TECHIECRM_API_BASE			
TECHIECRM_LICENSE_SERVER			

SECRET_KEY	
DEBUG	FalseTrue
DATABASE_URL	sqlite:///./data/localportal.sqlite3

LICENSE_DEV_MODE
LOCALPORTAL_ALLOW_UNVENDORED_PACKAGES
TECHIECRM_LOCAL_DB_ENDPOINT
.envLICENSE_DEV_MODE

TCRM-

1. <http://localhost:8000/activate/>
- 2.
- 3.

venv\Scripts\python venv/bin/python

venv/bin/python manage.py activate_license TCRM-XXXX-XXXX

```
venv/bin/python manage.py check_license
check_licenselicensed: Truelicensed: False
```

check_license

		TCRM-
		TECHIECRM_LICENSE_DIR

check_license

		powershell -ExecutionPolicy Bypass -File bin\run.ps1
		bin/run.sh

```
http://localhost:8000/
  • 8000PORTPORT=.env
  •
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```

• `http://localhost:8000/health/{ "ok": true, "licensed": true, ... }`
`data/access.log`
`data/error.log`

`/opt/techiecrm-localportal C:\techiecrm-localportal`

- 1.
- 2.
- 3.
4. `powershell -ExecutionPolicy Bypass -File C:\techiecrm-localportal\bin\run.ps1`
- 5.

`C:\techiecrm-localportal\venv\Scripts\python.exemanager.py sync_cloud C:\techiecrm-localportal`

`~/Library/LaunchAgents/com.techiecrm.localportal.plist`

```
<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE plist PUBLIC "-//Apple//DTD PLIST 1.0//EN" "http://www.apple.com/DTDs/PropertyList-1.0.dtd">
<plist version="1.0"><dict>
  <key>Label</key><string>com.techiecrm.localportal</string>
  <key>ProgramArguments</key><array><string>/opt/techiecrm-localportal/bin/run.sh</string></array>
  <key>WorkingDirectory</key><string>/opt/techiecrm-localportal</string>
  <key>RunAtLoad</key><true/>
  <key>KeepAlive</key><true/>
  <key>StandardOutPath</key><string>/opt/techiecrm-localportal/data/service.log</string>
  <key>StandardErrorPath</key><string>/opt/techiecrm-localportal/data/service.log</string>
</dict></plist>
```

`launchctl load ~/Library/LaunchAgents/com.techiecrm.localportal.plist`

`com.techiecrm.localportal.sync.plist com.techiecrm.localportal.syncProgramArguments /`
`opt/techiecrm-localportal/venv/bin/pythonmanager.py sync_cloud <key>StartInterval</`
`key>integer>900</integer>KeepAlive`

`~/config/systemd/user/techiecrm-localportal.service`

`[Unit]`
`Description=TechieCRM Local Portal`
`After=network.target mongod.service`

`[Service]`
`WorkingDirectory=/opt/techiecrm-localportal`
`ExecStart=/opt/techiecrm-localportal/bin/run.sh`
`Restart=on-failure`

`[Install]`
`WantedBy=default.target`
`systemctl --user enable --now techiecrm-localportal`

```
techiecrm-localportal-sync.service
[Unit]
Description=TechieCRM Local Portal sync

[Service]
Type=oneshot
WorkingDirectory=/opt/techiecrm-localportal
ExecStart=/opt/techiecrm-localportal/venv/bin/python manage.py sync_cloud
techiecrm-localportal-sync.timer
[Unit]
Description=TechieCRM Local Portal sync every 15 minutes

[Timer]
OnBootSec=5min
OnUnitActiveSec=15min

[Install]
WantedBy=timers.target

systemctl --user enable --now techiecrm-localportal-sync.timer
sudo loginctl enable-linger <account>
```

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- MAX_SQL_SERVERMAX_SQL_DBMAX_SQL_USERMAX_SQL_PASSWORD.env
MAX_SQL_SERVER
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```
venv/bin/python manage.pyvenv\Scripts\python manage.py
```

1. --dry-run --limit 100
2. --dry-run
3. http://localhost:8000/

--dry-run	
--list	
--entities clients,contacts	
--limit N	
--sync	
--since 2026-08-01	--sync
--reconcile	
--drop-first	--dry-run

--batch-size N	
--verbose	
--no-service-check	

manage.py activate_license	
	.env

```
venv/bin/python manage.py sync_cloud
```

--loop

--loop	
--interval N	--loop
--skip-publishers	

[illegible]

http://localhost:8000/local/

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manage.py sync_cloud	
manage.py sync_owner --claim	
	MAX_SQL_USERMAX_SQL_PASSWORD
manage.py mongo_server --set ...	

manage.py check_services--json

- C:\ProgramData\TechieCRM\techiecrm-local-db.json MONGO_URL.env
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C:\ProgramData\TechieCRM\sync-owner.json

powershell -NoProfile -ExecutionPolicy Bypass -File C:\techiecrm-localportal\installer\coexist.ps1

-Account DOMAIN\name	
-IntervalMinutes N	
-NoTask	
-Remove	
-AllowUnsupportedOS	

venv\Scripts\python manage.py sync_owner --claim --release

SINGLE_SESSION_MODE .envobserveenforce

MAX_SQL_SERVER		
MAX_SQL_SERVER		

LOCALPORTAL_SESSION_REGISTRYoffice_sqllocal_mongo cloud

/health/

venv/bin/python manage.py mongo_server --set db1.example.lan:27017 --user techiecrm

MONGO_URL.env

mongo_server	
mongo_server --test	
mongo_server --set ADDRESS --user NAME	hosthost:portmongodb://mongodb+srv://
mongo_server --clear	

--set--tls--auth-source NAMEadmin --db NAMEMONGO_DB--no-test --password-stdin--timeout
N

http://

ALLOWED_HOSTSCSRF_TRUSTED_ORIGINS.env crm.example.lanhttps://
crm.example.lanTECHIECRM_TRUSTED_PROXY_COUNT=1 X-Forwarded-For

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- 1.
 - 2.
 3. .envdata
 4. installer\install.ps1installer/install.sh .env
 - 5.
- installer/install_requirements.py
-

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.env	
data/localportal.sqlite3	
data/sync_state.json	
data/media	
	mongodump

1. powershell -NoProfile -ExecutionPolicy Bypass -File C:\techiecrm-localportal\installer\coexist.ps1 -Remove
2. launchctl unloadsystemctl --user disable --now
- 3.
4. data

localhost:8000	.envdata/error.log
	PORT=.envCSRf_TRUSTED_ORIGINS
	CSRf_TRUSTED_ORIGINS
SINGLE_SESSION_MODELOCALPORTAL_SESSION_REGISTRYTECHIECRM_TRUSTED_PROXY_COUNT	.env
	.env.env
install_requirements.py	
	SINGLE_SESSION_MODE=off
	manage.py sync_cloudmanage.py sync_owner

data/error.logdata/access.log manage.py check_servicesmanage.py check_license

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C:\Program Files\TechieCRM	%LOCALAPPDATA%\Programs\TechieCRM: \Users\<you>\AppData\Local\Programs\TechieCRM	/Applications/TechieCRM.app		
C:\Program Files\TechieCRM\MongoDB		Contents/Resources/mongodb		
C:\ProgramData\TechieCRMData		~/Library/Application Support/TechieCRM/TechieCRMData	~/local/share/TechieCRM/TechieCRMData	
C:\ProgramData\TechieCRM		~/Library/Application Support/TechieCRM	~/config/TechieCRM~/local/	

ieCRM		Support/ TechieCRM~/ Library/Logs/ TechieCRM/ mongod.log	state/TechieCRM/ mongod.log
%APPDATA% \TechieCRMC: \Users\<you>\AppD ata\Roaming\Techie CRM	%APPDATA% \TechieCRM	~/Library/ Application Support/TechieCRM	~/config/TechieCRM

C:\ProgramDataAppData %APPDATA%%LOCALAPPDATA%
app_config.json license.datlogs XDG_CONFIG_HOME\$XDG_CONFIG_HOME/TechieCRM
~/config/TechieCRM

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/NOMONGO	

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1. TechieCRM-beta-0.8.0.5-setup.exe
- 2.
- 3.
- 4.
- 5.
6. C:\Program Files\TechieCRM

7. C:\ProgramData\TechiecrmData

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- C:\ProgramData\TechieCRM
- README-TechieCRM-data.txt

8.

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13.

MongoDB C:\ProgramData\TechieCRM techiecrm-local-db.json "engine": "none"

%LOCALAPPDATA%\Programs\TechieCRMC:
\Users\<you>\AppData\Local\Programs\TechieCRM %APPDATA%\TechieCRM

TechieCRM-beta-0.8.0.5-setup.exe /VERYSILENT /SUPPRESSMSGBOXES /NORESTART
[/DATADIR=D:\TechiecrmData] [/DBADMINUSER=name] [/DBADMINPASSWORDFILE=C:\path\pw.txt]
[/NOMONGO] [/ALLUSERS | /CURRENTUSER] [/DIR="D:\Apps\TechieCRM"]

- /ALLUSERS /CURRENTUSER /DIR=C:\Program Files\TechieCRM
- /NOMONGO /NOMONGO /NOMONGO /DELETEDATA

- /DATADIR=
- /DBADMINPASSWORDFILE=
-
-
- /DELETEDATA/DELETEDSETTINGS

```
TechieCRM-beta-0.8.0.5.dmg /Applications/TechieCRM.app
TechieCRM-beta-0.8.0.5-x86_64.AppImage ~/Applications
chmod +x TechieCRM-beta-0.8.0.5-x86_64.AppImage
./TechieCRM-beta-0.8.0.5-x86_64.AppImage
sudo apt install libfuse2--appimage-extract ./squashfs-root/AppRun
```

1. /Users/Shared
- 2.
- 3.

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techiecrm_app		

C:\ProgramData\TechieCRM\credentials	
	secret-toolibsecret-tools

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- 1.
 2.
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 - 3.
 4. <name>.moved-YYYYMMDD TechiecrmData.moved-20261002
 -
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netstat -ano | findstr 27617127.0.0.1:27617 LISTENING 0.0.0.0

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- net localgroup "TechieCRM Users" <account> /add net localgroup "TechieCRM Users" sporter /add"DOMAIN\sporter"
- net localgroup "TechieCRM Users" <account> /delete

- C:\ProgramData\TechieCRM
-
- C:\ProgramData\TechieCRM\sync-owner.json

installer\coexist.ps1 -Remove sync-owner.json

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	C:\ProgramData\TechiecrmData
	C:\ProgramData\TechieCRM

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-
- ...moved-YYYYMMDD
- README-TechieCRM-data.txt
-
- D:\ C:\ProgramDataC:\Users

```

%TEMP%
• %APPDATA%\TechieCRM
• ~/Library/Application Support/TechieCRM
• ~/.local/share/TechieCRM ~/.config/TechieCRM
unins000.exe unins *.exe
"C:\Program Files\TechieCRM\unins000.exe" /VERYSILENT /SUPPRESSMSGBOXES /NORESTART
[/DELETEDATA] [/DELETESETTINGS] [/LOG=C:\path\uninstall.log]
• /DELETEDATA
• /DELETESETTINGSC:\ProgramData\TechieCRM
• /LOG=/SUPPRESSMSGBOXES
•
C:\ProgramData
/NOMONGO

takeown /f C:\ProgramData\TechiecrmData /a /r /d y
icacls C:\ProgramData\TechiecrmData /grant *S-1-5-32-544:F /t /c /q
rmdir /s /q C:\ProgramData\TechiecrmData
rmdir /s /q C:\ProgramData\TechieCRM
*S-1-5-32-544 /d y /d jtakeown icacls C:\ProgramData\TechiecrmData /setowner
*S-1-5-32-544 /t /c /q

```

TechieCRM-DbTool.exeTechieCRM.exe
C:\Program Files\TechieCRM

TechieCRM-DbTool status	
TechieCRM-DbTool reset-admin	
TechieCRM-DbTool setup-record --out C:\path\record.html	
TechieCRM-DbTool delete-old-copy --path FOLDER	moved-YYYYMMDD

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	C:\ProgramData\TechieCRM\logs

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- - C:\ProgramData\TechieCRM\logs\mongod.log ~ /Library/Logs/TechieCRM/
mongod.log ~ /local/state/TechieCRM/mongod.log
 - xattr -dr com.apple.quarantine /Applications/TechieCRM.app
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 - /admin-portal/license/
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- 3.
- 4.
- 5.

```
mkdir -p ~/.techiecrm && chmod 700 ~/.techiecrm pbpaste > ~/.techiecrm/
archive_pull_key && chmod 600 ~/.techiecrm/archive_pull_key
TechieCRM_Workspace_Archives --dest git fetch -q && git show origin/master:bin/
pull_workspace_archives.py | python3 -
```

ABUSE_*

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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.sqlprojects/ 02_drop_old_projects_view.sql	TCRM_Projects_ViewProjects_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
activity/01_schema.sql	TCRM_Activity_Log

TCRM_Activity_Log

- db_owner
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TCRM_Workspace

-
- 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_SERVER DB_NAME DB_USER DB_PASSWORD --server / --database / --user / --password
--teardown --confirm
```

techiecrmTCRM_LOCAL_DB

	127.0.0.1:27617
	mongodb://localhost:27017
MONGO_URL	MONGO_URL

.env

CLOUD_API_URL	https://api.techiecrm.com/api/api
CLOUD_USER_EMAIL	
EMAIL_ENC_KEY	
MONGO_URLTCRM_LOCAL_DB	MONGO_URLtechiecrm-local-db.jsonTCRM_LOCAL_DBtechiecrm

DB_SERVERDB_NAMEDB_USERDB_PASSWORD	python -m src.entrepreneur_dashboard_setup
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- https://techiecrm.com techiecrm.com
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features dev_mode=True

main.py

.coding-team/followup_for_shannon.md

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main.pyadministrator.py



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ann@yourcompany.com		

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logs/app.log

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	hosthost:porth1:27500,h2:27500mongodb://...mongodb+srv://.../database?options

MONGO_URL MONGO_URL

json/app_config.json"diagnostics"

logs/ debug.logapp.log errors.log

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4. debug.logerrors.log
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TECHIECRM_BASE_PT
TECHIECRM_BASE_PT TECHIECRM_BASE_PT=19.5

	~/techiecrm/backups

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docs/design/product_vocabulary.md
techiecrm://client/...
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- email_decode
- ole_hooks
- sync_outlook
- write_fax

- web_form

- assign_to_campaign
- camp_retrieve_unsuccessful
- camp_team_updated
- combine_entries
- convert_contacts_partners
- convert_partners_companies
- create_invoice
- create_journal_note
- create_quote
- custom_actions
- custom_manage
- email_priority_high
- email_priority_low
- email_priority_normal
- fin_new_bill
- fin_new_invoice

- lib_close
- lib_save
- mailing_lists
- opp_team_updated
- peg_board
- relate_entries
- rpt_contacts_column
- rpt_contacts_detailed
- rpt_related_column
- template_campaign_auto
- template_campaign_trad
- template_quota

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				

assets/icon_set shared/theme/icon_set.py

rec-company		
rec-individual		
rec-contact		
rec-partner		
rec-household		
badge-prospect		

meeting-add	
todo-add	
list-add	
list-remove	

clients		
biz		
rec-individual		
rec-contact		
service		

	sales	
	proj	
	agree	
	wo	
	compose	
	email	
	note	
	letter	
	fax	
	doc	
	sms	
	call_out	
	call_in	
	schedule-meeting	
	todo	
	call_out	
	project-plan	
	insert-file	
	insert-link	
	print-envelope	
	print-label	
	time-task	
	assign-marketing	
	quote	
	ar	
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	quota	
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	inventory	
	ap	
	part	
	hr	
	duplicate	
	list-make-current	
	select-invert	
	select-all	
	select-none	
	select-entry	
	rec-individual	
	rec-company	
	email	
	compose	
	reply	
	reply_all	
	forward	
	refresh	
	entry-templates	
	prospects-my	
	prospects-all	
	rec-company	
	rec-contact	
	rec-company	
	rec-contact	
	list-all	
	list-recent	
	list-add	
	list-remove	
	email	
	phone-log	
	web	
	peg-board	

	refresh	
	sort-by	
	service	
	sales	
	refresh	
	email	
	mkt	
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	msg	
	sms	
	inventory	
	proj	
	search-repeat	
	show-all	
	phone	
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	sales	
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	rec-partner	
	retrieve-companies	
	retrieve-individuals	
	retrieve-contacts	
	check-duplicate	
	web	
	web-form	
	export-sheet	
	sync-mail	
	open-document	
	phone	
	time-task	
	web-portal	
	conn	
	database-check	

	pers	
	phone	
	phone-log	
	phone	
	quota	
	clients	
	clients	
	print-label	
	print-envelope	
	rec-contact	
	sales	
	mkt	
	service	
	kb	
	kb	
	udf	
	cal	
	cal	
	cal	
	cal	
	todo	
	dash	
	fin	
	hr	
	document-admin	
	template-library	
	entry-templates	
	project-plan	
	quota	
	letter	
	email	
	territory	
	udf	

	icon-bar	
	database	
	web-portal	
	msg	

	save-to-client	
	save-to-sale	
	save-to-ticket	
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	conversations	

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	AMGR_Territory
	AMGR_Territory_Managers
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	TCRM_TerritoryRule
	AMGR_SearchCatalogAMGR_SearchCatalogItemAMGR_Territory.Catalog_Id
	TCRM_TerritoryAlignmentTCRM_TerritoryAlignmentItem

TCRM_ docs/db/territory/Ol_schema.sql

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