TEC World
The CRM for manufacturers' reps and rep agencies

TEC World — Administration and Configuration Guide

Last updated October 22, 2026. Feature availability as of 2026-11-06. The online guide is always current.

1. Before you start

This guide is for the people who set up and run a TEC World workspace. It covers every settings page and every feature an admin configures, including features that are not switched on yet.

1.1 Access levels

- **User**: works in the CRM. Sees the records their role, sharing rules and territories allow.
- **Admin**: everything a user can do, plus most settings pages, imports, merges and integrations.
- **Super Admin**: everything an admin can do, plus Users, Effective Permissions, Permissions & Safety, Audit Trail, Announcement, and Cleanup Center. Only super admins can add or remove users, reset two-step verification, or clear a sign-in lock.
- You set each person's access level on the Users page.

1.2 Where settings live

- Admins open Settings from the gear icon in the top bar. The Settings sidebar has five groups: **Workspace**, **Users & Access**, **Email & Automation**, **Records & Data**, and **Integrations**.
- Each settings page appears once. You only see the pages your access level can open.
- Press **Ctrl+K** (Cmd+K on Mac) anywhere and type a setting's name, for example "tax" or "dropdown", to jump to it.
- Pricing rules live in the Pricing module in the top bar, not in Settings. See chapter 7.
- Most delete, remove and disconnect actions are confirmed by pressing and holding the button for a moment; a quick click on that button does not act.

1.3 What "Availability" means

- Some features carry an **Availability** line. **Available.** means it is switched on for every workspace. **Coming soon.** means it is described here so you can plan for it, but it is not switched on yet.
- Some features also depend on your plan. Those sections name the plans that include them.
- This guide is also a PDF you can download. The online guide is always the current version.

1.4 Supported browsers

- TEC World supports current versions of Chrome, Edge, Firefox and Safari: Chrome 111 or later, Edge 111 or later, Firefox 111 or later, and Safari 16.4 or later (on Mac, iPhone and iPad). Internet Explorer and older versions are not supported.
- Every update is tested in Chromium, the engine Chrome and Edge are built on, before it is released. Edge is supported and tested as Chromium, not as a separate browser.
- A weekly automated check of Firefox and Safari's engine, on a computer-sized screen and on an iPhone-sized one, in light and dark mode, is being introduced.
- If your company manages browsers centrally, check that the versions your team uses meet these minimums before you invite them.

2. Workspace setup and onboarding

2.1 First-time setup

- New workspaces can be set up with our team, or by the customer on their own at /signup.
- Self-serve sign-up, where a new customer creates a workspace on their own:
- **Availability:** Available.
- The first time an admin signs in, the **Set up your CRM** window walks through three steps: **Name your CRM**, **Invite your team**, and **Import your contacts**. You can click **Skip setup** and do each step later in Settings.
- The import step takes a CSV of contacts from Outlook, Google or a spreadsheet. Nothing is written until you confirm.

2.2 Branding and quote PDF branding

- Settings → Branding sets the **CRM display name**, the business **Address**, the **Logo** and the **Navbar color** for the whole workspace. Only admins can change them. Everyone else sees them read-only.
- The display name, logo and business address print on your quote PDFs. The address prints in the header and as the remit-to address.

2.3 Module Manager

- Settings → Module Manager turns each module on or off for the whole workspace. For each module you choose **Enabled**, **Navbar** (shown in the top bar) and **Quick Create** (shown in the **+ New** menu), and you set the order.
- A module hidden from the navbar also stays out of the **+ New** menu.
- **Allow non-admins to see Integrations** lets everyone view the Integrations page. Only admins can still connect or change an integration.

2.4 Picklists

- Settings → Picklists controls the dropdown values your team uses: **Company Statuses**, **Company Types**, **Quote Stages**, **Opportunity Project Stages**, **Activity Types**, **Lead Sources** and **Document Categories**.
- Each quote stage and opportunity stage has a **Probability to win**, which weights the pipeline. Closed stages never count as open pipeline.
- Click **Add** to add a value, or **Reset to Defaults** to start over.

2.5 CRM Defaults

Settings → CRM Defaults holds the workspace defaults in one page:

- **Saved View Defaults**: the default date range for Quotes, Companies and Activities, and the default Activities view.
- **Email & Activity Defaults**: the default activity type and title for notes, tasks, calls and emails, and whether tasks get an automatic due date and reminder.
- **Save Behavior**: how record drawers save your edits.
- **Assignment & Routing**: **Auto-assign territory from state / ZIP**, **Auto-fill related owner from account manager**, **Assign new activities to the current user**, **Prefer account manager on account-linked activities**, and the **Default activity owner group**.
- **Export Preferences**: the **Default file type** (CSV, Excel or PDF), the date format, the filename date style, and whether linked record columns are always included.
- **Data Quality Rules**: **Require a primary company for linked contacts**, **Warn on duplicate contact emails**, **Require relational links on quotes**, **Require relational links on sales**, and the duplicate alert thresholds.
- **Saved-view repair (admin)**: clears a person's saved views if they stop loading. Click **Reset saved views**.

2.6 Configuration Editor

- Settings → Configuration Editor sets **Analytics Defaults**: **Fiscal year start month**, **Default analytics mode**, **Default report view**, **Default group by** and **Default scoreboard size**, plus whether customer and manufacturer hierarchy rollup is on by default.

- **Record Opening Behavior** decides whether Companies, Quotes and Manufacturers open in a drawer or in full screen the first time. People can still switch views after that.

2.7 Glossary

- Settings → Glossary explains what words like Quote, Opportunity, Lead, Activity, Task and Tag mean in TEC World. Everyone can open it.

2.8 Announcement banner

- Settings → Announcement (super admins) shows a banner across the CRM.
- Set the **Headline**, **Message**, **Severity** (Info, Success, Warning or Critical) and **Audience** (Everyone, Admins only or Super admins only). Optionally set **Start showing at**, **Stop showing at**, a button (**CTA label** and **CTA link**), and whether people can dismiss it.
- Turn on **Show announcement across the CRM** and check the **Live Preview** before you save.

2.9 Views and layout

- Each person saves their own filters and columns on every list page. Admins set the starting defaults under **Saved View Defaults** (section 2.5).
- Arrange mode: press and hold to rearrange the navigation, record tabs, cards and table columns. Each person's order is their own, and **Put everything back in the default order** resets it.
- **Availability:** Available.

2.10 Business card scanning

- **Scan Business Card** on the New Contact, New Company and New Lead pages reads a photo of a business card and fills in the form. The photo is sent to OpenAI to be read and is not stored. Nothing is saved until the person saves the form.
- Scanning itself is on in every workspace today; only the switches below are still to come.
- Workspace switches for AI features: the **AI processing** section of the Settings → Branding page lists business-card scanning, AI statement reading and report summaries, each with what it sends and to which provider. An admin turns each one off or on for everyone in the workspace; everyone else sees them read-only. Each starts on. While scanning is off, the **Scan Business Card** button is hidden and any scan is refused before the photo is read. Every change is recorded in the Audit Trail with who made it and the old and new value.
- **Availability of these switches:** Available.

2.11 Dates and times

- Settings → CRM Defaults → **Dates & Times** sets how dates and times show on screens for the whole workspace: the **Date format on screens** (month first, day first or year first) and the **Clock** (12-hour or 24-hour).
- Settings → My Date & Time: each person can pick their own **Date format**, **Clock** and **Time zone**. Left blank, each one follows the workspace.
- Times show in the person's own time zone if they picked one, otherwise in the **Workspace time zone** set on the Scheduler. If the workspace never saved a time zone there, times show in the time zone of the person's own computer or phone.
- Exports keep the date format set under **Export Preferences** (section 2.5).
- **Availability:** Available.

2.12 List size

- Settings → List Size: each person picks their own **Row density** (Compact, Normal, Roomy) and **Text size** for every list page (Companies, Contacts, Leads, Quotes, Manufacturers and Support). It saves as they click and only they see it. The list toolbars no longer have a Size menu.

3. Users, roles, and access

3.1 Users

Settings → Users is for super admins.

- Click **+ Add User** and fill in the **User Name**, **Role**, **Profile**, **Status**, **Access Level**, **Email Address**, **Office Phone** and **Reports to**, then click **Save User**. The person gets an email invitation.
- After saving, open the user to set their **Assigned territories** and **Assigned manufacturers**, then click **Save changes**.
- **Feature access** turns on the Commissions, Multiplier and Tags tabs for that person.
- **Reports to** sets a person's manager. A manager sees their team's work on Home and can see product costs. When price approval is on, managers approve their team's prices (section 10.4).
- **Reset two-factor** makes a person set up two-step verification again, for example after a lost phone. Unless it is your own account, it also signs them out everywhere and revokes the API keys and app connections they own. Keys they created for other people keep working.
- **Sign out everywhere** ends every sign-in of a person (browsers, phones, trusted devices) and revokes every API key and AI or partner app connection they own or created. They stay active and sign in again as themselves.

- If an account may have been taken over, signing out is not enough on its own. Have the person change their password, and use **Reset two-factor** if a sign-in method may have been added. A sign-in that was already open can no longer create an API key, connect an app, add a connection or invite a user, but it keeps reading and changing records for up to an hour, and connections the person set up keep sending until you turn them off. So set the person **Inactive** first, then sign them out everywhere and reactivate them after an hour.
- **Clear sign-in lock** unlocks someone after too many failed password attempts.
- **Remove user** deactivates the person. Use **Move their open work to** to hand their open records to someone else first. Nothing is erased: a person who is already Inactive stays listed under Inactive; Remove still moves their open work and clears their membership and any admin rights.
- Each user takes a seat on your plan. If you have no seats left, the page asks you to choose a plan or add seats (chapter 16).

3.2 Roles

- Settings → Roles holds the role list people are assigned on the Users page. Picking a role can fill in the access level and feature access for you.
- A role's switches are **Commissions tab**, **Multiplier tab**, **Tags tab**, **Manage settings**, **Manage scheduler**, **Unlock commissions** and, when the Knowledge Base is on, **Manage knowledge base**.
- Only super admins can change roles. Click **Add Role**, or **Reset to Defaults** to start over.
- When your workspace has it, Settings → Field Visibility hides chosen fields from a role: a company's phone, a quote's total, a product's cost and similar. People in that role do not see those fields in lists, records, exports, search or the API, and cannot change them. Admins always see every field.

3.3 Profiles

- Settings → Profiles holds reusable start-up presets: the default analytics mode, report and grouping, customer hierarchy rollup, and whether records open in a drawer or full screen.
- Assign a profile to a person on the Users page. Only super admins can change profiles.

3.4 Groups and teams

- Settings → Groups creates teams. Click **+ Add group**, set the **Name** and **Color**, tick the **Members**, then click **Save**. Each group in the list shows who is in it.
- People you add to a group get a notification in the bell when you save.
- Groups can be used in sharing rules, routing and settings templates.
- **Settings templates** (under **Advanced** at the bottom of the Groups page) copy your own safe defaults (saved view defaults, activity defaults, save behavior and export preferences) to a group. Click **+ New**

template, then choose **Send to groups** or **Share with specific people**. Members see **Group Settings Available** on their Settings page and can accept the template, then change it for themselves.

3.5 Sharing rules

- Settings → Sharing Rules decides who sees which records.
- Each rule has a **Rule name**, a **Module** (Companies, Contacts, Quotes, Sales, Activities, Manufacturers, Documents or Accounting), a **Target type** (Everyone, Group, Role or Territory) and a **Scope** (Read, Edit or Manage).
- Click **Add Rule**, then **Save Sharing Rules**.
- Admins always see every record, whatever the sharing rules say, except in Accounting.
- Accounting is closed by default: with no Accounting rule, only admins can use it. Once an Accounting rule exists, only the people it names can use it, admins included. Super admins always keep access.

3.6 Two-step verification

- Two-step verification for everyone: each person signs in with a password and a second step.
- **Availability:** Available.
- **Authenticator app** (recommended): scan the QR code with an app such as Google Authenticator, 1Password or Authy, then enter the 6-digit code.
- **Text message**: a 6-digit code sent to a mobile phone. The person agrees to receive the text before the number is saved.
- **Availability:** Available.
- **Both, and choose each time**: on Settings → Two-Step Verification a person adds the method they don't have yet (text messages or an authenticator app). With both set up, the code screen offers **Use a text message instead** or **Use your authenticator app instead**.
- **Email me a code instead**: a fallback code sent to the person's own email address.
- **Availability:** Available.
- **Backup codes**: one-time codes to save for a lost phone. Each person gets a sheet of ten on Settings → Two-Factor Backup Codes with **Get a New Code Sheet**, and that page shows how many are left. A new sheet stops the old codes working. Using a code retires the rest, signs the person out on their other devices and emails them, and they set up a new method right after.
- **Availability:** Available.
- **Trusted devices**: after a successful second step, that browser skips the second step for 30 days. You can see and revoke trusted devices on Login History with **Revoke Trust**.
- Lost phone? A super admin clicks **Reset two-factor** on the Users page.

3.7 Other sign-in options

- **Automatic sign-out**: TEC World signs a person out after 30 minutes of inactivity.
- **Sign-in lock**: after 5 failed password attempts within 15 minutes, the account is locked for a short time. A super admin can click **Clear sign-in lock** on the Users page.
- **Continue with Google**: people sign in with their Google account. It works only for people you have already added as users, with the same email address.
- **Availability:** Available.
- **Sign in with a text code**: a one-time code sent by text message instead of a password.
- **Availability:** Coming soon.
- **IP allowlist**: Settings → IP Allowlist (admins) limits the app's pages and API to your office or VPN networks. Add single addresses (203.0.113.7) or ranges (203.0.113.0/24, 2001:db8::/48) with a label, up to 100, then turn on **Enforce this list**. A member on any other network sees "Your network is not allowed for this workspace" instead of the app; they stay signed in and can carry on from an allowed network. **Also apply to API tokens** (on by default) holds the REST API, AI app connections and SCIM to the same list. You cannot save an enforced list that leaves out the address you are on. Not covered yet: the mobile app's own database connection and signing in itself.
- **Availability:** Available.

3.8 Single sign-on (SSO)

- Single sign-on lets people sign in through your company's identity provider (SAML). We set it up with you for your email domain. People then enter their work email on the sign-in page and choose **Sign in with SSO**.
- A super admin records the covered email domains and the connection for each in Settings → Single Sign-On. A domain can belong to one company only, and public mail domains (gmail.com, outlook.com, ...) cannot be used.
- SSO signs in people you have already added as users, with the same email address (the address their invite went to). Someone your identity provider knows but TEC World does not is asked to get an invite from their admin; nobody is created automatically. Super admins keep their password sign-in: their accounts are not switched to SSO automatically.
- If your workspace requires two-factor authentication, it still applies after an SSO sign-in.
- **Availability:** Available.

3.9 Automatic user provisioning (SCIM)

- SCIM lets your identity provider, such as Okta or Microsoft Entra ID, add and remove TEC World users for you.

- A new user is always created at the User access level. Admin rights are still given in TEC World.
- Removing someone in your identity provider deactivates them in TEC World. Their records are kept.
- SCIM does not change emails, roles, groups or territories. Manage those in TEC World.
- A super admin creates the access key your identity provider uses. Every change is written to the Audit Trail.
- **Availability:** Available.

3.10 Permissions & Safety

Settings → Permissions & Safety is for super admins.

- **Audit coverage and support access**: choose which kinds of routine changes are written to the Audit Trail. Turning a switch off stops those routine changes from being recorded. Always written, whatever the switches say: permission and access changes, settings changes (these switches included), exports, TEC World support access, sign-in, MFA, API token and SCIM events, and every delete and merge.
- The same card holds the switch that lets TEC World support enter your workspace. When it is off, our staff cannot enter, and turning it off ends a visit already in progress at once (the end is recorded in your Audit Trail). When it is on, each visit is time-limited, your admins are notified, and every change is marked as made by TEC World staff in your Audit Trail.
- **Sensitive Action Approval Gates**: for each risky action you can turn on **Enable gate**, **Require reason** and **Require typed confirmation**. The actions are commission overrides, account, contact, manufacturer and product merges, bulk deletes, permission changes and manufacturer deletes. Gated actions then need a reason, and optionally a typed phrase, from anyone who is not a super admin.

3.11 Login History

- Settings → Login History shows **Recorded Sessions**, people **Seen In Last 24h**, **Inactive Users**, **Access Alerts** (for example sign-ins after hours in your workspace time zone) and **Recent Access**.
- **MFA Trusted Devices** lists each browser that is skipping the second step. **Revoke Trust** makes that device ask again at its next sign-in.

3.12 Audit Trail

- Settings → Audit Trail (super admins) shows who did what in your workspace, when, and from which network address and device: changes to records and settings, sign-ins and sign-outs (including failed and locked sign-ins), two-step verifications, exports and record views. Open an event to see the before and after values.
- Entries cannot be edited or deleted from the app.
- Narrow the list by **Category**, **User**, the **From** and **To** dates, **Record ID** or **IP address**, then click **Apply**. **Reset** clears the filters. With no dates set, the list covers the last 30 days. The Category and IP address

filters search up to 92 days at a time, the others up to a year.

- **Export CSV** or **Export JSON** downloads the entries that match the filters, newest first, up to about 4 MB per file. A larger set is cut short and its file name ends in "-partial", so narrow the dates and export again. Each export is itself recorded in the Audit Trail.

3.13 Effective Permissions

Settings → Effective Permissions is for super admins.

- Pick a **Member** to see what that person can actually reach: each module's scope, the rule or role that grants it, and whether its tab opens; the territories and manufacturers that limit which records they see; who they report to; and switches such as Commissions, Multiplier, Tags and product cost.
- **Export access review (CSV)** downloads the same view for every member, for a periodic access review. Each download is recorded in the Audit Trail.
- A change to sharing rules or roles can take up to 30 seconds to show here.

4. Territories, routing, and tags

4.1 Territories

- Settings → Territories lists your territories. Click **Add territory** and enter a short **Code** (for example NTX) and an optional **Name**. Codes appear on records, imports and reports.
- **Routing rules** decide which territory a new lead goes to. Each rule has a **Match type** (State, ZIP prefix or Country), a **Match value** and a **Priority**. The highest priority wins. On a tie, the more specific match wins.
- A territory with no rules never receives routed leads.

4.2 Aliasing

- Aliasing (Settings, under Records & Data) maps the spellings on commission statements to your real companies, for example "LONESTAR ELEC SPLY (HOUTX)". Click **Add alias**, enter the name **As written**, and pick the company it **Means**.
- After adding an alias, re-import the statement to link those lines. A spelling that matches a real company name is ignored, and one spelling cannot point at two companies.
- Only admins can add or change aliases.

4.3 Assignment and routing defaults

- Territory assignment from state or ZIP, owner fill-in and activity ownership are set under **Assignment & Routing** on CRM Defaults.

4.4 Tags

- Settings → Tags creates tag groups, such as a product family, that link to real manufacturers. Reps then tag conversations in Activities with real links instead of loose text.
- Type a name and click **Add**, then select manufacturers and click **Link Selected**.

5. Email, notifications, and automation

5.1 Workflows

Settings → Workflows controls what the automations do. The Scheduler controls when they run.

- **Task Follow-Up**: due-today and overdue notifications.
- **Email Follow-Up**: creates a follow-up task when someone logs an email with no next step, after the number of days you set.
- **Quote Follow-Up Tasks**: creates follow-up tasks for quotes in the stages you pick (for example Quoted and Presented), with a maximum per run and a **Fallback assignee**.
- **Stalled Opportunities**: creates a task when a quote has sat too long with no open next step.
- **Stale Companies**: reminds the owner when a company has gone quiet, and can create a follow-up task.
- **Daily Digest**: a daily summary, optionally also sent to groups.
- **Cleanup Escalation**: alerts admins or super admins when data issues pass a count you set.
- **Auto-Tagging**: keeps tags in step with linked manufacturers, product families and territory names.
- **Workflow Defaults** sets the default activity type, follow-up offset in days and reminder time for quick follow-ups.

5.2 Scheduler

- Settings → Scheduler sets the **Workspace time zone**. Every time on the page uses it, and Login History uses it for after-hours alerts.
- It also sets how often reminders are checked, the daily digest time, the weekly cleanup scan day and time, and the Outlook health check time.
- **Recent Job History** shows what ran and the result.

5.3 Notification Settings

- Settings → Notification Settings sets the **Default follow-up days** and **Default reminder time** for new follow-up tasks, and whether new tasks get a reminder automatically.

5.4 Outgoing Server

- Settings → Outgoing Server sets how TEC World sends mail such as digests and reminders.
- **Delivery mode** is **Disabled**, **Outlook one-way** or **Workspace SMTP**. Set the **Sender name**, **Sender email**, **Reply-to email** and **Digest recipient email**.
- For SMTP, enter the **SMTP host**, **SMTP port**, **SMTP username** and **SMTP password**, and keep **Require TLS** on. Turn on **Allow invalid SMTP certificates** only for an older mail server you trust.
- Use a **Test recipient email** to check delivery.

5.5 Follow-Up Templates and signatures

- Settings → Follow-Up Templates holds the wording that fills in quote follow-up tasks. Nothing is emailed from it.
- Use the editor and merge fields, then **Save as New Template** or **Update Active Template**. **Test Preview** shows the result for a sample quote.
- Settings → My Follow-Up Signature: each person sets their own **Name**, **Title**, **Email**, **Phone** and **Sign-off line**.

5.6 Email Blocklist

- Settings → Email Blocklist stops addresses and domains from becoming contacts or activity. Enter an address such as junk@vendor.com, or a whole domain such as *@vendor.com, with an optional reason.
- Automated mailboxes such as no-reply and notifications are always skipped.

6. Records and data

6.1 Importing data

- Most list pages have an **Actions** menu with **Import CSV** and **Import Excel**, plus blank templates. Every import shows a preview first and flags likely duplicates before anything is saved.
- Settings → CRM Templates stores the workbook shapes your team imports: companies, contacts, commissions or custom. Click **Download Blank Workbook**, or **Use In Converter** to map an outside spreadsheet into that shape.
- Uploaded documents are scanned for viruses.

6.2 Line Sheets

- Settings → Line Sheets keeps the brochures and line sheets reps use in quotes and follow-ups. Each one is a **Shared path**, a **Web link** or an **Upload PDF**, with a manufacturer, category, product family, territories

and tags.

6.3 Data Quality

- Settings → Data Quality shows a **Quality Score** and the open issues: companies missing an owner or territory, contacts missing a primary company or contact details, broken links on quotes and sales, duplicate links, unlinked documents and more.
- **Quick Repair Actions** fix the safe cases, such as **Deduplicate Account Links**, **Assign Primary Companies** and **Repair Quote Links**. **Run All Safe Repairs** runs every safe fix at once.

6.4 Merge Center

- Settings → Merge Center merges duplicate companies, contacts and manufacturers. Pick the surviving record, answer **Why are we merging these records?**, then click **Merge Into Survivor**.
- Merges can be gated on Permissions & Safety.

6.5 Cleanup Center and Information Health

- Settings → Cleanup Center (super admins) lists companies missing an owner or territory, manufacturers missing a target or regional manager, and unlinked documents.
- Settings → Information Health (super admins) shows ownership, territory and planning gaps, quotes, sales and commissions that are missing their links, and contacts missing an email, a phone or a company. Its **Open Leads That May Be Contacts** section lists people who are both an open lead and a contact (confirmed: the same email or phone, or the lead is linked to that contact; possible: a similar name): **Convert into this contact** keeps the values you pick and converts the lead, and **Not the same person** dismisses the pair for the whole workspace. Admins and users can add the Information Health tile to their home page from Widgets: it lists the gaps on companies, quotes, sales and contacts, and the open leads that may be contacts, in the territories they are assigned to. (The separate Contacts Needing Info tile was retired into Information Health on 2026-10-30.)

6.6 Recently Deleted

- Settings → Recently Deleted lists deleted records for 30 days. Click **Restore** to bring a record back with everything deleted alongside it.
- If something changed after the delete, the page tells you which parts were **Not restored**.

6.7 Data Export

- Settings → Data Export downloads your workspace data as a file. Click **Download data export**.
- The file follows your own access. Commission amounts and rates need Can view commissions. The commissions and splits themselves also need commission export access from the workspace owner.

Multipliers and SPAs, and the accounting ledger, are left out if you can't see them in the app. The file lists what was left out under "omitted". For a complete export, a super admin downloads it.

- Every export is recorded in the Audit Trail, and the workspace's other super admins are notified. Data Export is not available while you use View as, or to support staff.
- For very large workspaces, contact support for a complete export. For the Audit Trail, use its own download.

6.8 History Import

- Settings → History Import (admins) loads a new agency's past sales and commission history from an Excel or CSV file.
- Pick the **Kind**, **Sales history** or **Commission history**, choose the file, and map its **Columns**. The mapping is saved with the import, ready for the next file. Sales history needs permission to edit Sales. Commission history needs permission to manage commissions.
- The **Preview** shows the rows in the file, how many will import, how many are already in TEC World, which are invalid, and any warnings. Nothing is saved until you click the import button, which shows the row count.
- Rows for a manufacturer that is not found are skipped. Rows for a customer that is not found are imported unlinked, with the name kept. To link them, create the company or add an alias on Aliasing, then preview again.
- Commission history imports paid lines only. The Preview counts **Unpaid** lines, which are skipped: they arrive on a live statement when the principal pays.
- When a row's rep is not a user in your workspace, the company's account manager is credited instead, and the Preview lists those rows.
- Imported rows are marked as history: they count in reports, but they send no notifications, are not sent to your accounting system, and do not recalculate commissions.
- Under **Past imports**, **Undo** removes exactly one import, and only while none of its rows has been edited and no commission links to them.
- **Availability:** Available.

6.9 Custom Fields

- Settings → Custom Fields (admins) adds your own fields to **Companies**, **Contacts** and **Opportunities**. Pick the object, give the field a **Label**, and choose its type: **Text**, **Number**, **Date**, **Yes / No** or **Picklist** (a single choice from a list you type in, for example a "Specifier" field on opportunities).
- People fill the fields in on the record itself. Who can see or change a value follows who can see or change that record, so a rep never sees a field value on a record they cannot open.

- Companies also get each field as an optional list column and a list filter. A column you show is included in the companies download.
- A field's type cannot be changed once it exists. **Turn off** hides a field everywhere but keeps every value, so turning it back on brings them back.
- **Availability:** Available.

6.10 Opportunities with several companies and contacts

- On an opportunity, **Other companies** and **Other contacts** add more companies and contacts beside its main ones, each with a role: **Distributor**, **End user**, **Specifier**, **Contractor**, **Engineer**, **Architect**, **Owner** or **Other**. An activity can also be attached to several opportunities from the activity itself.
- A company or contact record lists the opportunities it is on. Pipeline totals still count each opportunity once, under its main company.
- Someone who cannot see a linked company or contact sees only a count of the links they cannot see, never the name.
- **Availability:** Available.

7. The price book

The Pricing module in the top bar holds your price sheets and pricing rules. The Price Sheets section needs the Products module. The other sections need the Multiplier module.

7.1 How a quote line is priced

When multiplier pricing is on, TEC World suggests each line's net price:

1. The **list price** comes from the distributor's own price sheet, then the manufacturer's base price sheet, then the product's catalog list price.
2. The **net price** is the list price times the best multiplier. When an SPA and a standard multiplier both apply, the one that prices lower for the customer wins. On a tie, the SPA wins.
3. A rep can type a different price. That typed price is what the quote uses.

- **Availability:** Available.

7.2 Price Sheets and products

- Price Sheets is your product catalog: manufacturer, part number, description, list price, commission rate, pricing unit, weight and price code.
- The distributor price sheets page holds price books. Leave **Distributor blank** to load a manufacturer's base list book, which applies to every distributor. Add a distributor only where their list really differs. A

part on neither falls back to the catalog, and the quote line says so.

- Click **+ New Sheet**, pick the manufacturer, then import or add the rows. **Delete Sheet** removes a sheet.
- **Product relationships**: on a product, link other products as **Related**, **Alternate**, **Replacement**, **Accessory**, **Bundle Component** or **Kit**.
- **Unit Cost** is shown only to admins and managers, including in product history. Everyone else never sees it.

7.3 Multiplier

- Multiplier holds your standard multipliers by **Company**, **Manufacturer**, **Price Code**, **Tier** and **Region**.
- Use **+ Add Record**, or **Import CSV** / **Import Excel** from the **Actions** menu. Templates are in the same menu.

7.4 SPA

- SPA holds special pricing agreements: **SPA No.**, **Distributor**, **Customer**, **Manufacturer**, **Price Code**, **Series Group**, **Component / Accessory**, **Multiplier**, **Effective** and **Expires**.
- A blank column matches everything, so an agreement with no price code covers every price code. An SPA outside its dates does not apply at all.

7.5 Commission Rate

- Commission Rate sets each manufacturer's default commission rate, entered as a decimal (0.08 = 8%). Per-part rates live on the product.
- When a quote is won, a rate is stored on the sale for reference. It does not create a commission. Commissions come from the manufacturer's statement.
- To load many at once, choose a CSV or Excel file under **Import rates** and review the changes before they are saved.
- The **Agency rate table** on the same page records what each principal should pay you, in percent, from a start date. A rate can be narrowed to one account, an account type or a product line. A saved rate never changes: to change one, close it and add the new rate, so the history stays exact. **Delete** is only for a rate entered by mistake.
- Anyone who can see commissions can see the rate table. Only people who manage commissions can add, close or delete rates.
- With the rate table on, a won quote's lines each take the narrowest matching rate from that table, picked by the day the quote was won. A line no rate covers falls back to its product's own rate, then the manufacturer default.
- **Availability:** Available.

7.6 Price Check

- Price Check answers "what would this line quote at, and why?". Enter the **Distributor**, **Customer**, **Manufacturer**, **Price code** and an optional **Part number**, then click **Check price**.
- It shows the **Net (unit) price**, the **Winning book**, the **Tie-break rule**, the **List price** and every candidate it considered.

7.7 Foreign-currency price sheets

- A distributor price sheet can be in another currency. Pick the currency on the sheet. It cannot change once the sheet has rows.
- Quotes convert the sheet's list price to US dollars at the latest exchange rate. If there is no rate, the line stays unpriced and says why. It never falls back to another price.
- The base product catalog stays in US dollars. Load a foreign catalog as a base price sheet instead.
- **Availability:** Coming soon.

8. Tariffs

Tariffs add a manufacturer's tariff surcharge and an estimated import duty to quote lines. They need multiplier pricing.

- **Availability:** Available.

8.1 The Tariffs page

Tariffs has three tables. Each can be edited in place or imported from CSV or Excel.

- **Tariff surcharges**: a manufacturer's surcharge, charged on the line's net price. Fill in **Manufacturer**, and optionally **Product Line** and **Price Code**, then **Surcharge %**, **Effective** and **Expires**. A blank product line or price code covers the whole manufacturer. The most specific row in its date window wins. Set **Includes Duty** when the surcharge already passes the duty through, so no duty estimate is added on top.
- **HTS and country-of-origin defaults**: the **HTS Code** and **Country of Origin** to use when a product has none of its own. A row with a product line beats the manufacturer-wide row.
- **Duty rules**: duties beyond the base rate, by **HTS Prefix** and/or **Country of Origin**. **add** stacks on the base rate (for example a 25% extra duty on one country). **replace** stands in for it (for example a 0% free-trade rate). Free-trade rates are never applied automatically: add a 0% replace rule for them.
- Percent columns store 25 as 25%. If your file holds fractions such as 0.25, multiply them by 100 first. The import warns you when a cell looks like a fraction.
- HTS codes have 4, 6, 8 or 10 digits. Countries are two-letter codes, or English names such as "China".

8.2 Products and the duty schedule

- A product's HTS code and country of origin come from your product import. To correct one, type it in **HTS Code (override)** or **Country of Origin (override)** on the product. A later import never overwrites a typed override.
- The order used is: the product's override, then its imported value, then the manufacturer and product line default, then the manufacturer default.
- Base duty rates come from the US tariff schedule published by the US International Trade Commission. TEC World refreshes them every night.

8.3 Tariffs on quotes

- Quotes show a **Tariff** column and a "Tariff surcharge" total. Each line's detail shows the HTS code and origin with where they came from, the surcharge rule, and the duty. A rep can override the duty and **Reset** it.
- No duty is estimated for goods made in the US, goods with an unknown origin, or a surcharge marked **Includes Duty**. A rate the schedule cannot express as a percent is flagged for a manual entry.
- Tariffs are filled in only on open quotes that have never been sent. They never change on their own later. To pick up new rules, the rep clicks **Refresh tariffs**.
- Tariffs are never marked up. They count toward the quote total that becomes the sale's net sales when the quote is won.
- Price Check shows a Tariff card for the line.

9. Currencies and exchange rates

TEC World stores every price in US dollars. A quote in another currency is converted when it is printed or shared.

- **Availability:** Coming soon.

9.1 Exchange Rates

- Settings → Exchange Rates shows the **Rates in effect today**, written as units of each currency per 1 US dollar. For example, CAD 1.365 means CA$1.365 = US$1.
- The European Central Bank (ECB) rate is fetched every business day.
- Under **Workspace rates**, add your own rate for a currency with its **Effective date**, an optional **Expires** date and **Notes**. Your rate wins over the ECB rate from its effective date.
- A currency with no rate from the last 7 days cannot be quoted. Currencies the ECB does not publish need a workspace rate.

9.2 Quoting in the customer's currency

- Choose the quote's currency on the quote header. A chip shows the rate in use, and a rep can type the quote's own rate.
- The rate locks the first time the customer could see the quote: a PDF download, an email draft, a share link, or **Mark as Sent**. After that the quote never changes rate on its own. **Use today's rate** sets a new rate on purpose.
- Without a rate, the quote cannot be sent in that currency. The editor shows a banner and turns off Send.
- Line prices are typed in US dollars. The customer's documents show the converted prices, tariffs, charges and totals.
- Pipeline, forecasts, sales and commission estimates stay in US dollars.

9.3 Sales and commissions in other currencies

- Commission statements and invoices in another currency are converted to US dollars at the exchange rate of the invoice date.
- The statement's currency comes from a mapped Currency column, else the manufacturer's report layout, else US dollars. Each row has one currency. An invoice that mixes currencies is refused.
- Sales, commission and intake records show an **Original** row with the amounts as received.
- **Availability:** Coming soon.

10. Quotes

10.1 Quote Notations and documents

- Settings → Quote Notations sets the default text printed under a quote's line items.
- Quote PDFs use the name, logo and address on the Branding page.

10.2 Tax Rates

- Settings → Tax Rates is the table reps pick sales tax from. Click **Add a rate** and enter the **Country** (US, CA, MX or another two-letter code), the **State / province**, the **Rate %** and an optional **Label**, such as "Texas sales tax".
- Choose whether **Freight is taxable** and whether the **Tariff surcharge is taxable** in that place.
- The country and state cannot change after you add a rate. Change the rate, label or the two choices, then click **Save**, or **Delete** the row.
- There are no manual rates on quotes. A quote with no tax row is tax exempt.

- **Availability:** Available.

10.3 Freight, other charges, and tax on a quote

- On a quote's Line Items tab, reps add freight and other charges in US dollars. Charges cannot be negative, so a discount is not a charge.
- The rep picks the tax state from your Tax Rates table. It starts at the company's ship-to address, or its billing address when there is no ship-to. The rate is copied onto the quote, so a later change to the table does not change a sent quote. Removing the tax row makes the quote exempt.
- The documents show the Subtotal, Tariff surcharge, each charge, Tax and the Grand total. Tax is charged on the subtotal, plus freight and tariffs where your table says they are taxable.
- Freight, other charges and tax do not count toward net sales.
- **Availability:** Available.

10.4 Price approval

- A quote line priced below the book price by more than your tolerance needs approval. A line with a negative price is always flagged.
- The tolerance is set on the Configuration Editor. The default is 10%.
- Approvers are the managers above everyone who priced a flagged line, set with **Reports to** on the Users page. When two reps priced lines on one quote, only a manager above both of them can approve.
- When no active manager is above all of them, or each such manager priced a line in the request, any admin approves.
- Nobody approves a request raised in their name, or one that holds a price they typed. The one exception: an admin who typed a price in the request may approve all of it, but only with a separate, recorded click.
- TEC World support staff never approve your prices.
- Any change to the flagged lines, even a quantity, asks for approval again.
- Approval never blocks sending. The quote shows a "Price approval pending" or "Price approval rejected" pill, and the approval panel sits above the quote's revisions.
- A rep's own exchange rate that is more than the tolerance below the reference rate counts as a discount too.
- **Availability:** Available.

10.5 Product cost and margin

- **Unit Cost** is visible only to admins and managers. Reps never see it, on any page.
- The margin view adds a Margin column and a margin total to quotes for admins and managers. It uses today's unit cost, counts only lines that have a cost, and is hidden when printing. Customers never see it.

- **Availability:** Available.

10.6 Guided accessories and kits

- When a rep adds a part to a quote, TEC World offers the kit parts, bundle components and accessories linked to it on the product (section 7.2). Nothing is pre-checked.
- The suggested quantity is the part's quantity times the linked quantity. Added parts are priced like any other line.
- **Availability:** Coming soon.

10.7 Share link and customer Accept

- A rep can share a quote with a private link. The customer sees the quote without signing in.
- A share link stops working 90 days after it was issued (the quote shows the date and who shared it); **Share Link** again issues a fresh link. When a person's access ends (removed, set Inactive, signed out everywhere, two-factor reset, or deprovisioned), the links they created stop working too; a colleague re-shares. Links issued before this release have no recorded creator and a fresh 90 days from the release, so a person's access ending does not withdraw them until they are re-shared; to withdraw one sooner, revoke it on the quote.
- Customers can accept once the rep clicks **Mark as Sent**, and only while the quote still matches what was sent. The customer types their name to accept. TEC World records the name, the time, and the customer's network address and browser, and notifies the rep. The quote shows an Accepted badge.
- Accepting does not change the quote's stage. Mark the quote Won when you are ready.
- **Availability:** Coming soon.

10.8 From quote to sale

- Reps send the PDF, then click **Mark as Sent**. That saves a revision of exactly what was sent.
- Every line must have a price before a quote can be marked Won.
- Moving a quote to a Won stage creates its sale automatically, once per quote. The sale's net sales is the quote total, and it stores one commission rate for reference: each line's rate (section 7.5), averaged by line total.

10.9 Orders and purchase order numbers

- On a won quote, **Convert to order** turns it into an order. A converted quote keeps its lines, total and sale.
- **Submit to principal** gives the order the next purchase order (PO) number, creates its sale, and opens an Outlook draft of the PO for you to send to the manufacturer's **Order desk email**. The draft is only ever created in your own Outlook mailbox (section 12.2). If it cannot be, **Email without attachment** opens the

PO, addressed to the order desk, in your own mail app, and **Save PDF to attach** saves the PO for you to attach. If the manufacturer has no order desk email, the draft opens without a recipient. A submitted order's lines are locked. A revision unlocks them and sends the PO again under the same number.

- Settings → Order Numbering (admins) sets the **PO prefix** and the **Next PO number**, so you can carry on your agency's own sequence. The next number can only move forward, and an order already submitted keeps the number it was sent with.
- **Availability:** Available.

11. Sales, commissions, and reporting

11.1 Commission statements

- Each manufacturer sends a different spreadsheet. On Commission Report Layouts, record each manufacturer's column layout once and the importer maps their file for you every month. Paste their header row, click **Suggest mapping**, check it, then click **Save layout**.
- Commission Intake logs every check and report as it arrives. **Open value** is money received but not yet imported. Click **Mark reviewed** when a line is done.
- Reading statement PDFs automatically: the PDF's rows are read into the review grid, and the statement total is checked against the rows. The file is sent to our AI provider to read it.
- **Availability:** Available.

11.2 Who sees commissions

- The Commissions tab is turned on per person, on the Users page or through their role.
- People who can view but not unlock commissions see a month only once it is released, which means approved or paid. Drafts stay hidden from them.
- A role with **Unlock commissions** sees drafts and can unlock financial edits with **Unlock**.
- Commission export to a CSV file:
- **Availability:** Available.

11.3 Accounting

- The Accounting module has **Invoice Upload** and **Invoice Match** (invoices matched to commissions). With no Accounting sharing rule, only admins can use them. Once an Accounting rule exists, only the people it names can use them, admins included. Super admins always keep access (section 3.5).
- **Payroll** and **Payroll Upload** are for admins only. When an Accounting rule exists, it must name them too. Upload a Gusto payroll export (.xlsx or .csv), check how its columns map, fix any that are wrong, then

import.

11.4 Reports

- **Manufacturer Reports**: upload a manufacturer's report file. TEC World writes a summary you review before it goes out by email and as an in-app notice.
- **Availability:** Available.
- **Principal scorecard**: one manufacturer's sales, commissions, quotes, activities, products, territories and top accounts, from the Manufacturers page, with a CSV download.
- **Availability:** Available.

11.5 Quotas

- Settings → Quotas (admins) sets one sales quota per rep per month. Pick the **Year**, type each month's amount, or click **Fill all months** to copy a rep's first filled month across the year, then click **Save quotas**. Leave a month empty for no quota. A quarter and a year are the sums.
- Quotas in Reports tracks attainment: the net sales credited to the rep named in each sale's own **Related Company Assigned To**, dated by the invoice date, or the payment date when there is none. Reassigning a company never moves past sales. A sale with neither date, such as one just created from a won quote, counts once it is dated.
- Reps see their own numbers, managers see their team, and admins see everyone. Each person's numbers count only the sales they can open.
- **Availability:** Available.

12. Integrations

12.1 The Integrations page

- Settings → Integrations lists every connection as **Connected**, **Needs attention** or **Not connected**, with a **Manage**, **Fix** or **Connect** button.
- Only admins can connect or change an integration. Non-admins can view the page only if Module Manager allows it.
- Settings → Integration Health shows each connection's status and the recent background errors from Outlook and Google mail and calendar.

12.1.1 Guided setup demo

- Admins can choose **Try guided setup (demo)** on Integrations to open the optional Guided setup demo. Other users cannot open it.
- Choose Salesforce or HubSpot, practice simulated authorization, and review fictional companies and contacts. The optional advanced area lets admins try sample field mapping and preview failures, then retry.
- **Finish setup (demo)** completes only the practice journey. It does not connect an account, transfer records, or change your real connections. The existing provider settings still handle connecting, reconnecting, sync choices, and disconnecting.
- Your sample choices stay in the current browser tab when you go back or cancel. Closing the tab can discard them. If the browser cannot save the draft, the demo shows a warning.

12.2 Outlook

- Settings → Outlook: click **Connect Outlook** and sign in to Microsoft. Email and calendar activity then sync into TEC World.
- **Calendar meetings.** A meeting on the connected mailbox's calendar is logged as a Meeting activity only when someone on it from outside your company is already a contact. Meetings with only your own people are not logged, and a meeting's notes are never copied into TEC World.
- **What syncs** holds the rules every connected mailbox shares: **Add new email senders as Contacts**, **Save additional email addresses to existing Contacts** and **Capture phone numbers found in email signatures**. Senders to skip go on the Email Blocklist.
- **Disconnect Outlook** stops syncing. Email and meetings already logged stay.
- **Quote and PO emails.** Send Email and Email PO create Outlook drafts only in the user's own mailbox, never in a colleague's or in a shared mailbox. Anyone TEC World cannot create a draft for gets **Email without attachment** and **Save PDF to attach** on the quote instead. Connecting Outlook replaces the workspace's connected mailbox, so do not reconnect to fix one person's email drafts; contact support.

12.3 Gmail and Google Calendar

- Settings → Gmail: enter the Google Workspace mailbox to watch, for example orders@yourcompany.com, and click **Connect Gmail**. Email arriving there becomes contacts and activities. The mailbox's calendar meetings sync too, by the same rule as Outlook's.
- Email arriving there also becomes support tickets (chapter 14).
- **Availability:** Available.
- The contact rules are shared with Outlook and set on the Outlook page.
- If the page says Gmail is not set up for your workspace yet, contact support.

12.4 Salesforce

- Settings → Salesforce needs a one-time setup by an admin. Create a Connected App in Salesforce, then enter its **Consumer Key**, **Consumer Secret**, **Login URL** and **Callback URL** and click **Save**.
- Each person then clicks **Connect Salesforce** and signs in to Salesforce.
- Under **What syncs**, an admin turns **Sync Companies**, **Sync Contacts** and **Sync Opportunities** on or off, then clicks **Save changes**. **Disconnect** removes the connection.
- Today, connecting saves the connection and your sync choices only. No records move between Salesforce and TEC World yet. To bring your Salesforce data in now, contact support for an import.
- Syncing records between Salesforce and TEC World, both ways:
- **Availability:** Coming soon.

12.5 HubSpot

- Settings → HubSpot: click **Connect HubSpot** and sign in.
- Under **What syncs**, choose **Sync Companies**, **Sync Contacts**, **Sync Deals**, **Sync Tasks** and **Sync Notes**, and whether to **Keep everything up to date automatically**. Click **Save changes**.

12.6 Dropbox

- Settings → Dropbox: click **Connect Dropbox** and sign in. Turn on **Let everyone on your team browse files** to share it with your team.
- **Disconnect Dropbox** removes it. Records already in TEC World stay.

12.7 Power BI

- Settings → Power BI: each person clicks **Connect Power BI** and signs in with Microsoft. The page then shows the Microsoft account they are connected as. **Reconnect Power BI** and **Disconnect** change or remove it.
- If the page says Power BI isn't set up yet, contact support to turn it on for your workspace. Admins can click **Test connection** to check that your workspace's Power BI setup can reach your reports.
- Connecting saves the connection only. Power BI reports are not shown in TEC World yet.

12.8 Jira

- Settings → Jira connects a Jira board. Enter the **Jira site address**, the **Email** and **API token** of the Jira account, and the **Board link**, then click **Connect Jira**. **Test connection** checks the saved details, and **Disconnect** removes them.
- Connecting saves the connection only. Jira work is not shown in TEC World yet.

12.9 Accounting system

- Settings → Accounting connects your accounting system. Enter the **Company site**, **App ID** and **Access token**, then click **Connect**.
- Under **What syncs**, choose **Sync Customers**, **Sync Invoices**, **Sync Payments** and **Sync Items / Inventory**.

12.10 Odoo

- Settings → Odoo keeps inventory and purchase orders up to date with Odoo. Ask your Odoo administrator for your **Odoo address** and an API key for a dedicated Odoo user with Inventory and Purchase access. Enter them, and the **Database** only if you were given one, then click **Connect Odoo**.
- Disconnecting stops inventory updates from Odoo, and stock changes not yet sent to Odoo are dropped. Your items keep their current counts.
- **Availability:** Available.

12.11 Private API

- Settings → Private API creates access keys for your own tools and scripts. A key can only see what the person who created it can see.
- Click **Create an access key**, name it, choose what it can see (**Customers & Contacts**, **Quotes & Sales**, **Tasks & Activity**, **Products & Inventory**), and choose when it stops working. Copy the key right away. It is shown only once.
- **Replace key** issues a new key and stops the old one at once. **Revoke** stops a key at once.
- A key stops working when the person it belongs to is deactivated or loses access. For something the whole company relies on (a Power BI refresh, a data warehouse sync), we recommend a separate user kept only for integrations: an admin with a shared mailbox your team watches, its password and sign-in codes in your company password manager, never used for everyday work. Give its key only the access the integration needs, and replace the key before it stops working. It takes a seat like any other user.
- Each key says when it was last used (for example "Last used 3 hours ago", or "Not used yet"), so you can tell whether the tool using it is still connecting. A request turned away before the key is let in (a missing permission, too many requests) does not count. Replacing a key clears it until the new key is used. A key made before October 2, 2026 that has not been used since says "Not used since" that date.
- Limits: 300 requests a minute per key.
- Shared limits: 400 requests a minute for all of one person's keys and connected apps together, and 1,200 a minute for all of your workspace's keys together.
- Reads also count toward the daily limits AI assistants use (1,000 a day per person and 10,000 a day for your whole workspace, or the numbers TEC World set for your workspace, section 12.12), shared between the two.

- **Plans:** included in the TEC World plan.
- Connections sends updates from your CRM to another system you use the moment they happen (a new contact, a changed company, a logged activity). Click **Add Connection**, give it a name and the address to send to (it must start with https://), and choose what to send. Copy the signing secret right away; it is shown only once. Each connection has **Turn Off** and **Turn Back On**.
- **Availability:** Available.
- A connection is turned off automatically only when both of these are true: the system it sends to has accepted none of its updates for 3 days, and at least 20 different updates have failed in that time (an update that is tried again counts once). Both are counted from the last update that system accepted, or from when the connection was added or turned back on, if that is later. Every admin is told, and the Connections page shows a banner until you turn it back on.
- **Availability:** Available.
- For developers, Webhooks (developer) shows each webhook's delivery history, sends a failed delivery again, sends a test event, and edits or re-enables a webhook. Admins only.
- **Availability:** Available.

12.12 AI assistants (MCP)

- On the Private API page, **Connect an AI assistant (MCP)** lets an AI assistant work with your CRM data. The assistant sees only what its owner can see, limited to the access they chose.
- Asked about their tasks, the assistant lists the person's open **My Tasks**: every activity assigned to them that is not completed, whatever its type (tasks, calls, meetings). It is the set the My Tasks work queue counts. The **Tasks** page shows only the ones of type Task, so a call that is still open appears in the assistant's list but not on the Tasks page.
- **Availability:** Available.
- **Plans:** included in the TEC World plan.
- There are two ways to connect. Each person can **sign in** from an approved AI assistant, with no key to copy, or paste an **access key** into their own client (section 12.11, or 12.14 for their own key).
- To sign in, add the endpoint shown on the card to your AI assistant as a custom connector (the card gives the steps for each approved assistant), then sign in to TEC World and allow access. A signed-in assistant shows in the key list as **(connected app)**. Click **Revoke** to disconnect it.
- **Availability:** Available.
- **AI assistants** (admins): turning off **Let approved AI assistants connect** disconnects every assistant that signed in. It does not stop access keys people pasted into an assistant: revoke those in the key list.
- **Availability:** Available.
- Limits: 60 requests a minute per key, 1,000 calls a day per person, and 10,000 calls a day for your whole workspace.

- Private API reads count toward the same daily limits.
- TEC World can set different daily numbers for your workspace. The connect card in Settings > Integrations > Private API shows the numbers that apply to you.
- AI assistant calls also count toward the shared limits in section 12.11: 400 requests a minute per person and 1,200 a minute for your whole workspace.
- Keys are read-only unless you issue an **AI writes (create and change contacts and activities)** key.
- **Availability:** Available.
- Signing in from an AI assistant can also create contacts and change their name, email, phone or job title, and log activities, mark an activity done, reschedule it, edit its notes or assign it to a teammate, for people who are allowed to make changes: admins, and reps once an admin turns on **Let reps create keys that can make changes** on the Private API page. An assistant connected before this stays read-only until the person disconnects it (**Revoke** in the key list) and signs in again.
- An activity the assistant logs is assigned to the person who connected it unless the request names someone else, so it counts in their My Tasks. A logged call stays open until someone marks it complete, unless the person said it already happened (the assistant then logs it as done). A rep's assistant can only change activities and contacts that are that rep's own or nobody's; an @mention in notes it edits notifies that teammate, as in the app. To assign an activity, the assistant needs the teammate's full name or email address as the CRM shows it.
- **Availability:** Available.

12.13 Website Monitoring

- Settings → Website Monitoring checks your pages on a schedule. Set the **Public base URL**, how often it runs, the latency thresholds and the request timeout, and add the endpoints to check.
- Turn on **Enable scheduled website monitoring** and **Notify admins on new failures**. The page shows error rates, slow checks, traffic and database health.

12.14 My API Keys

- Settings → My API Keys lets each person create and revoke their own access keys, for their own AI assistant or scripts. A key acts as its owner and sees only what they can see. Treat it like a password: anyone who has it can use it.
- Each key says when it was last used, as on the Private API page (section 12.11).
- AI assistants a person signed in to (section 12.12) show here too, as **(connected app)**. **Revoke** disconnects one.
- **Availability:** Available.
- **Plans:** included in the TEC World plan.

- Keys that make changes (the AI writes key, section 12.12): unless an admin turns on **Let reps create keys that can make changes** on the Private API page, only admins can make one.
- On the same page an admin can turn off **Let people create their own keys**. Then only admins can create a key here, and the keys people made for themselves stop working until it is turned back on. Keys an admin created for someone keep working.
- **Longest a person's own key can last** limits how long a new key can work (7, 30, 90 or 180 days, or up to a year). Keys people already have keep their dates.
- Your super admins get a notification, and an email where your workspace sends mail, whenever someone creates an API key.
- **Availability:** Available.

12.15 Gusto

Settings → Gusto is for admins who can edit Accounting.

- Click **Connect Gusto** and sign in to Gusto as a company admin. Under **What TEC World does with Gusto**, all four choices start on as soon as Gusto is connected. Turn off any you do not want:
- **Bring in payroll**: each payroll Gusto runs shows up in Accounting, one row per person. A payroll whose date you already uploaded by hand is skipped, so nothing is counted twice (section 11.3).
- **Availability:** Available.
- **Pay commissions through Gusto**: when a rep pay run is committed (Reports → Commissions → Pay), each W-2 payee's payout goes on their next Gusto payroll. Only W-2 payees who have a TEC World login and are matched to a Gusto employee are sent. 1099 sub-reps are never sent. Pay runs committed before this choice was on are not sent. A run marked paid another way before that payroll runs is taken off it.
- **Availability:** Coming soon.
- **Add new people to Gusto**: people added to TEC World are added to Gusto, and Gusto emails them to finish their own onboarding.
- **Match departments to territories**: a person's Gusto department follows their TEC World territory.
- **Availability:** Coming soon.
- **Disconnect** stops payroll coming in, and nothing more is sent to Gusto. Commission pay already on a payroll Gusto has not run yet stays there, so check it in Gusto before it runs.

12.16 Trainual

- Settings → Trainual (admins): a Trainual admin creates an API key in Trainual under My settings → Integrations & AI, which needs a Trainual Premium or Enterprise plan. Paste the key and click **Connect**.
- Everyone then sees their own Trainual training on the Training page and can search the subjects assigned to them. Admins can search all of your company's Trainual content and see each person's

progress under **Team progress**. A person's Trainual email must match their TEC World email.

- **Keep Trainual's people in step**: people added to TEC World get a Trainual invite, and people deactivated here are archived in Trainual.
- **Disconnect** stops training progress showing in TEC World. Nothing in Trainual is deleted.
- **Availability:** Available.

12.17 Snowflake

- Settings → Snowflake (admins) connects your company's Snowflake. Ask your Snowflake administrator for your **Snowflake account**, the **Database**, the **Schema we write to**, the **Schema we read from** and the **Warehouse**. Enter them and click **Save**. Snowflake then shows **Waiting for setup**.
- We send your Snowflake administrator a short set of setup steps. When they have finished, click **Check connection**. If Snowflake later asks you to reconnect, have your administrator check that our access is still set up, then click **Reconnect**.
- **Disconnect** stops sharing data with Snowflake. Anything already in Snowflake stays there.
- **Availability:** Coming soon.

12.19 AI Chat

- If your company has its own chat site, it answers using your company's own AI provider account, so the provider bills AI usage to you. Settings → AI Chat (admins with **Manage settings**) is where you add that account's API key, once. Nobody else needs to handle it.
- Create the key in your AI provider's console (the page links to it and lists the steps) and set a monthly spend limit there. Paste the key, click **Test key**, then **Save**. Saving tests the key again first: a key the provider refuses is not saved.
- The key is stored encrypted and never shown again. The page shows only its last four characters and when and by whom it was added. Your chat site picks up a new key within a few minutes, and cannot answer until one is added.
- **Replace key** swaps in a new one. **Hold to remove key** removes it, and your chat site stops answering within a few minutes.
- Adding, replacing and removing the key are recorded in the Audit Trail.
- **Availability:** Available.

12.20 Constant Contact

- Settings > Constant Contact is for admins who can manage settings and edit Leads. It shows connection status, reconnect, pause and disconnect controls.

- Constant Contact admin setup holds the secure connection details and, under Advanced, the name/company/job-title mapping, conflict choices, consent and history. Connecting is the only setup step (2026-10-22): updates turn on by themselves. Every contact on every Constant Contact list comes into Leads as one lead, tagged with each list as a show (Leads > Shows); a lead goes to Constant Contact (onto a list this CRM creates for its leads) only when its "In Constant Contact" box is ticked on the Leads list. Unsubscribed contacts come in but are never sent.
- Only leads sync, in both directions. This connection does not send campaigns or email. Check any automations attached to your selected list before turning on updates.
- A lead's existence is not marketing permission. Record verified permission for the person's current email before sending a new subscribed contact. Unsubscribes take precedence, and removed contacts are not added back to the list.
- Duplicate emails and conflicting changes need review. If a lead creation has an unknown outcome, retries look for the original record without sending another create request. Pause stops future updates; disconnect removes the connection details while retaining record links and preferences.
- **Availability:** Available.

12.21 Custom API

- Settings > Custom API (admins) connects any service with a REST API, such as a data provider or an ERP, without code: a name, the web address, how to sign in and its key, and where to read records. **Test** shows a sample of the first records before you save.
- It only reads. Records land on the connection's **External records** tab and show on a company or contact only on an exact email or website match. It never creates, changes or deletes CRM records.
- Each connection can also let the other service send changes right away (webhooks), checked with a signing secret. Keys and secrets are write-only and every change is in the Audit Trail.
- Step-by-step help, including troubleshooting: Connect a custom API.
- **Availability:** Coming soon.

12.22 Meta (Facebook and Instagram)

- Settings > Meta is for admins who can manage settings and edit Leads. Click **Connect Meta** and sign in to Facebook as someone who manages your business's Pages and ad account, then allow every permission.
- Tick the Pages whose lead forms should become leads, pick the ad account for the spend report, and click **Save**. Each Facebook or Instagram lead form submitted on a ticked Page becomes a new, unassigned lead with source "Meta Lead Ads" within about a minute. The campaign, ad and every answer are in the lead's notes.

- If a lead with the same email already exists, it is kept as it is and the new submission is noted on its timeline.
- The page shows the last 30 days of spend, impressions and clicks per campaign, with the new leads each campaign created and the cost per new lead. Spend updates every few hours; **Update now** pulls it at once.
- If Meta signs the connection out, the page asks you to click **Reconnect Meta**. Leads submitted meanwhile wait and come in once it works again. **Disconnect** stops new leads and spend updates; leads already brought in stay.
- **Availability:** Coming soon.

13. Knowledge Base

- The Knowledge Base holds training videos, documents and links in folders, filtered by manufacturer.
- Click **+ New**, then add a **Title**, **Description**, **Folder** and **Manufacturer**, and upload a **File** or paste a **Link**. Videos (MP4, MOV or WebM) up to 500 MB play in the app and cannot be downloaded. Documents up to 25 MB are scanned for viruses.
- **Assign** an item to people, or to **Everyone** (which includes future hires), with an optional due date. **Team progress** shows who has finished.
- People whose role has **Manage knowledge base** can add, edit and delete items.
- **Availability:** Available.

14. Support tickets

- The Support Queue turns email arriving in a connected mailbox into tickets.
- Admins set each ticket's status and category, assign it, snooze it, close it, and add internal notes the customer never sees. Other members can read the queue.
- **Availability:** Available.

15. Ginger voice assistant

- Ginger turns a voice memo, an uploaded recording or typed text into proposed CRM updates. You review every proposed action before it is saved. Confident, simple actions can be marked for automatic apply.
- Before recording a call, the person confirms that all parties have consented.
- Recording audio is kept in your workspace's private storage for 90 days, then deleted. The transcript is kept.

- Settings → Ginger rules (admins) holds house rules that Ginger's chat follows, such as the words your company uses and what to point out, and lets you turn Ginger actions off for a role. Rules only narrow what Ginger does; they never let anyone see or save more, and admins are never limited.
- **Plans:** included in the TEC World plan, with a monthly number of Ginger uses.
- **Availability:** Coming soon.

16. Billing and plans

- Settings → Billing & Plans is for admins. TEC World is priced per user per month. See the public pricing page for current prices.
- Pick a number of seats, then click **Subscribe**. To change seats, use the seat stepper, click **Update to** the new number, then click **Confirm**. Changes are prorated automatically.
- The page shows how many seats are in use. Add seats before inviting more people.
- **Manage billing** opens the secure billing portal for your payment method, invoices and cancellation. Card details are held by our payment processor, never by TEC World.
- If your subscription ends, your data stays available. Plan features and new seats pause until you subscribe again.
- Plan features: the Private API is included in the TEC World plan. AI assistant access is included in the TEC World plan. Priority support is included in the TEC World plan.
- **Availability:** Available.

17. Getting help

- Email: **support@jmcmahanllc.com**
- In the app, open Support & Help from the top bar.
- The public Help Center and the User Guide cover everyday tasks.
- Download this guide as a PDF.

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