Actions

1. Actions: Overview

The **Actions** module in Wifox Business Core Solution centralizes **all client-facing activities** —such as calls, emails, meetings, tasks, and custom events—so your team can plan, execute, and track every interaction in one place. Each Action record captures its type, subtype (if configured), assigned user, due dates, status, and results. By leveraging Actions, you ensure:

1. **Consistency**: Standardized fields and color-coded labels for quick visual identification.
2. **Accountability**: Clear ownership and SLA tracking for each activity.
3. **Visibility**: Real-time dashboards and filters let you spot overdue follow-ups or high-priority tasks.
4. **Automation**: Triggers and reminders can be set up based on action types and subtypes.
5. **Reporting**: Aggregate metrics on activity volume, response times, and outcomes.

2. Actions: Use Cases

Use Case #1: “Call” Logging and Outcomes Tracking

When a sales rep completes a prospecting call, they log a **Call** action with subtype “Cold Call” or “Follow-up.” They record the outcome (e.g., “Left voicemail,” “Spoke with decision-maker”), assign the next action automatically based on the result, and set due dates—ensuring no opportunity slips through the cracks.

Use Case #2: “Meeting” Scheduling and Attendance

An account manager needs to organize a quarterly business review. They create a **Meeting** action, pick date/time, attach the calendar invite, assign it to themselves or a team, and track RSVP status. Reminders fire before the meeting, and post-meeting notes are captured directly in the action record.

Use Case #3: “Task” Management for Support Tickets

A support engineer is assigned a critical bug report. They create a **Task** action with subtype “Bug Investigation,” set an SLA date, and update status from **Open → In Progress → Resolved** as they work. All steps are timestamped and visible to stakeholders, improving transparency and accountability.

Use Case #4: Automated “Email” Follow-ups

After a webinar, marketing seeds a **Email** action subtype “Webinar Follow-up” for each attendee one week later. Automation rules generate these actions en masse, and the team monitors open rates and click-throughs directly from the action dashboard—driving timely, personalized outreach.

Use Case #5: Cross-Team Reporting on Actions

The sales director needs a weekly summary of all client interactions. They filter **Actions** by type, subtype, owner, and date range—exporting counts of completed vs. overdue tasks. This report highlights high-performing reps, reveals process bottlenecks, and informs coaching priorities.

3. Clients Actions Module

The **Clients Actions** module provides a centralized, read-only view of every action (notes, calls, comments, etc.) logged against your clients—across all projects and desks. It reuses the same columns, sorts, filters, and row-actions you already know from the Clients tab, but consolidates all client actions in one place.

1. Accessing the Clients Actions Module

Open the Main Menu: Click the ☰ icon (top-left) to expand the navigation panel.
Navigate to Clients → Actions: Under the **Clients** group, click **Actions**.

2. Module Layout

2.1 Header Controls

Control	Description
Filter	Opens the right-side drawer to apply granular filters on any column.
Search	Free-text search box that filters rows by matching Creator, Client, or Text fields.
+ Add	(Optional) Opens the “Add Action” form—create a new note/call/comment record for a client.

2.2 Actions Table

The table columns mirror those in the Client Details tab:

Column	What It Shows
Action date	When the action actually took place (if set).
UID	System-generated unique ID (auto-increment).
Type	Category of action (Note, Call, Comment). Click to open its detail panel.
Subtype	Secondary classification (if configured under Settings → Configurations → Actions).
Client	Client name (link to their profile).
Project	Project or desk context for this action.
Creator	User who logged the action.
Created	Timestamp when this record was first saved.
Updated at	Timestamp of the most recent edit.
Text	Brief description or note content.

Column	What It Shows
Actions	✏ **Edit** — open the record for modification

3. Sorting:
How: Click on a column header (e.g. UID, Created, Type).
Why: Quickly jump to newest/oldest actions or group by Type/Client.

4. Searching:
Scope: Matches Creator, Client name, and Text.
Behavior: As you type, the table filters in real time—no need to hit Enter.

5. Filtering:
Open Filters: Click the **Filter** button to slide in the filter drawer.

Available Filters:
Created date: "From → To" picker
Creator: dropdown of system users
Type: select one or more action types
Subtype: select one or more configured sub-categories
Client: pick specific clients
Project: filter by project/desk
Action date: when the event actually occurred

Apply or Clear:
Save applies all chosen criteria and closes the drawer.
Remove individual filters by clicking the "×" on their badges above the table, or reopen the drawer to clear all.

6. Row Actions:
Edit (✏): Opens the familiar "Edit Action" form where you can adjust Client, Type, Subtype, Text, Action Date, and Responsible.
Delete (□□): Prompts **"Are you sure? Cancel | Delete"** to guard against accidental removals.

7. Improved Navigation
To streamline daily workflow, the Clients Actions module supports faster cross-navigation between Actions and Clients.

Open Client in a New Tab
You can open a client profile without losing your position in the Actions list:

1. Hold **Ctrl (Windows/Linux)** or **Cmd (macOS)**
2. Click the **Client name** in the table

The client profile will open in a new browser tab.

This allows you to:

1. Review client details
2. Edit client information
3. Return to your filtered Actions list instantly

Return to the Actions List
When opening an action or navigating into a client profile, use the **Back to Actions** button to return directly to the previously filtered list.

Your:

1. Filters
2. Sorting
3. Page number

remain preserved for seamless workflow continuity.

8. Next Steps:
Review or Update Subtypes: If you need more granular action categories, go to **Settings → Configurations → Actions**, switch to the **Subtypes** tab, and add/edit your Subtype definitions (Type, Name, Color).
Log New Actions: Use **+ Add** to record client engagements as they happen—then come back to this module for a full audit trail.
Combine Search + Filters + Sort: For powerful cross-project analysis—e.g., find all “Call” actions for “Acme Corp” in the last 30 days, sorted by Action date.

With the **Clients Actions** module in place, you gain full visibility and control over every touchpoint with your clients—centralized, sortable, searchable, and filterable exactly like your Clients list.

4. How to Create an Action

The **Actions** module is where you log every client interaction—notes, calls, comments, etc.—across all your projects. This guide walks you through each click, field, and next step, so even brand-new users can follow along confidently.

1. Open the Actions Module

1. **Locate the left navigation bar** on your screen.
2. **Find the “Actions” icon** (it looks like a small calendar with a check-mark).
3. **Click “Actions.”**
4. The main **Actions** table will load on the right.

2. Understand the Actions Table

At the top you’ll see controls:
Filter (funnel icon)
Search… (text box)

Below is the table header row:

Column	What It Shows
Action date	When the action occurred (sortable)
UID	Unique, auto-incremented ID (ca000001)
Type	Category (Note, Call, Comment)
Subtype	Secondary category (if enabled)
Client	Which client this action is for
Project	Which project the client belongs to
Creator	Who logged the action
Responsible	Who will follow up
Created at	When the record was created
Updated at	Last edited timestamp
Text	The body of your note/comment
Actions	Edit ✎ or Delete 🗑️ controls

> **Tip**: Click any column header (e.g. UID or Created at) to sort ascending/descending.

3. Add a New Action

3.1. Open the Add Form:
Click the **+ Add** button in the **top-right corner**.
A panel slides in from the right titled **Add action**.

3.2. Fill in the Fields

Field	Where to Look	What to Enter
Client	Top of form, first dropdown	Start typing client name; select from the autocomplete list.
Type	Directly under Client	Choose **Note**, **Call**, or **Comment**.
Subtype	Under Type (if your Type has subtypes)	Choose the relevant subtype (e.g., “Follow-up” under Call).
Text	Large multiline box	Enter your note, call summary, or comment details.
Responsible	Below Text	Begin typing an employee’s name; select from the list.
Action date	Above the footer buttons	Pick the date/time the interaction actually happened, or leave blank for “no date.”
Project	(If shown) Under Responsible	Pick the project if you have multiple projects active.

> **Note:**
>
> **UID** is generated automatically when you click **Save**.
> If **Subtype** doesn’t appear, your admin must configure Subtypes under **Configurations → Actions → Subtypes**.

3.3. Save Your Action:
Click the **Save** button at the bottom.
The panel closes and you’re returned to the table.
Your new action appears at the top (sorted by **Created at**).

4. Verify & Manage Your New Action

Locate it by its **UID** or the **client’s name** via the **Search…** box.
Filter by Type, Subtype, Responsible, or date using the **Filter** drawer:

1. Click the funnel icon.

2. Tick the fields you want to filter (e.g. “Type = Call” and “Responsible = Alice”).
3. Click **Apply**.

Edit: Hover over the row, click the ✎ icon in the **Actions** column to update any details.
Delete: Click the □□ icon to remove an action (you’ll see a confirmation prompt).

5. Troubleshooting Tips

“Invalid Date”? Make sure you pick a valid **Action date** or leave it blank—don’t enter text.
No Subtype list? Ask your admin to add Subtypes under **Configurations → Actions**.
Responsible field empty? Ensure you have at least one Employee created under **Employees**.

Congratulations! You’ve successfully logged an action. Repeat these steps for each client interaction to build a complete, searchable history of all your work.

5. How to Edit an Action

Updating an existing Action lets you correct typos, reassign responsibility, or add missing details. These steps guide you from locating the record through saving your changes.

1. Open the Actions Module:
Click **Actions** in the left-hand menu.
The main Actions table will appear.

2. Locate the Action You Want to Edit:
Search by client name, UID, or text in the **Search…** box.
Or use **Filter** (funnel icon) to narrow by Type, Creator, Responsible, dates, etc.

3. Click the Edit Icon: In the row for your Action, hover at the far right under **Actions** and click the ✎ pencil icon.

Optional: Open Edit Action in a New Browser Tab
To work with multiple Actions in parallel or avoid losing your place in the list, you can open the Edit action panel in a separate browser tab.
Hold **Cmd (macOS)** or **Ctrl (Windows/Linux)** and click the ✎ Edit icon.
The Action edit panel will open in a new tab, allowing faster navigation between Actions.

4. Review & Modify Fields in the Edit action Panel
A side panel titled **Edit action** slides in. Fields you can update include:

Field	Can You Edit?	Notes
Client	No	Read-only—actions stay tied to their original client.
Type	No	Fixed once created (Note, Call, Comment).
Subtype	Yes	If your Type supports Subtypes, pick one here.
Text	Yes	Update the content of your note/comment/call log.
Responsible	Yes	Change who’s assigned to follow up on this Action.
Action date	Yes	Correct the date/time this interaction occurred.

> **Tip:** The **Created at** timestamp is read-only and shows when the action was first logged.

5. Required Comment on Closing an Action
When marking an Action as **Completed**, providing a closing comment may be mandatory depending on system configuration.

If the **Completed** checkbox is enabled and the system requires a closing comment:

1. The **Comment on closing** field becomes required.
2. The field is highlighted in red if left empty.
3. The system will block saving until a comment is entered.

This ensures accountability and proper documentation of why the action was closed.

How It Works

1. In the Edit action panel, check the **Completed** box.
2. The **Comment on closing** field appears (or becomes active).
3. Enter a summary of the result, outcome, or resolution.
4. Click **Save**.

If the field is empty and required:

1. A validation message appears.
2. The Action cannot be saved.

Why This Is Important
Requiring a closing comment helps:

1. Maintain audit transparency
2. Document client interaction outcomes
3. Ensure proper handover between managers
4. Prevent silent closure of tasks

This creates a reliable activity history within the CRM.

6. Save Your Changes:
Click **Save** at the bottom of the panel.
The panel closes, and the table reloads with your edits.
Check the **Updated at** column to confirm your changes were recorded.

7. Confirm & Audit:
You can re-open the Edit panel at any time to verify.
All edits are tracked in **Updated at** for auditing.

6. How to Delete an Action

Deleting an Action permanently removes it from the system. Only do this if the entry was created in error or is no longer needed for record-keeping.

1. Open the Actions Module: Click **Actions** in the left-hand menu to display your table.
2. Find the Action to Remove: Use **Search…** or **Filter** to pinpoint the exact row by UID, client, or text.
3. Click the **Delete** (□□) Icon: In the row's **Actions** column, click the trash-can icon.
4. Confirm Deletion:
A small confirmation tooltip appears:
Are you sure? Cancel Delete
Click **Delete** to proceed or **Cancel** to abort.

> **Warning:** This action **cannot be undone**. Deleted actions are permanently removed from every report and audit log.

5. Verify Removal:
The row immediately disappears from the table.
Total count (if shown) and any pagination adjust to reflect the deletion.

Best Practices & Notes

1. **Archival over Deletion**: If you need to keep audit trails, consider editing an action's text to mark it "invalid" rather than deleting.
2. **Permissions**: Only users with delete rights on Actions (configured under **Roles & Permissions**) can see the trash icon.
3. **Error Handling**: If deletion fails (e.g. due to a backend constraint), you'll see an error message—contact your system administrator.

7. How to Filter the Actions Table

When your Actions table grows large, the Fast Filters panel allows you to narrow down results instantly by any combination of fields. Filters are available directly above the table.

1. Open the Fast Filters panel:

In the **Actions** module, click the **Filter** button (funnel icon) at the top left of the table.

2. Understand the Available Filter Fields

Field	Type	What It Does
Created date	Date-range picker	Limits results to actions created within the specified date range. Supports dynamic presets: “Up to now” and “From now on”.
Creator	Dropdown	Shows only actions created by the selected team member(s).
Type	Dropdown	Filters by action type—**Note**, **Call**, or **Comment**.
Subtype	Grouped multi-select (conditional)	Appears once one or more Types are selected. Subtypes are visually grouped under their parent Type for clarity.
Client	Dropdown	Restricts to actions associated with one or more specific clients.
Action date	Date-range picker	Limits to actions whose scheduled or recorded “Action date” falls within the range. Supports dynamic presets: “Up to now” and “From now on”.
Responsible	Dropdown	Shows only actions assigned to the selected person(s) for follow-up.

> **Note:** Subtype availability depends on your system configuration. Subtypes are grouped under their corresponding Type in the selector.

3. Apply Your Filters:

The panel includes the following elements:
Created date – a date-range selector that filters actions by their creation timestamp.
Action Date – a second date-range selector used for the scheduled or performed date of an action.
Creator – filters actions by the user who created them.
Responsible – displays only the actions assigned to selected team members for follow-up.
Types – filters by the action's main category (for example, *Note*, *Call*, *Comment*, *Meeting*, etc.).
Subtypes – appears automatically once one or more Types are selected. Subtypes are grouped under their parent Type, allowing you to clearly see which subtypes belong to which action category. Multiple subtypes across different types can be selected.
Clients – restricts the view to actions linked to specific clients.
Apply – applies the selected filters and refreshes the table view.
Drop filters – clears all active filters at once.
Create view – saves your current filter combination for repeated use.

How to use Fast Filters:

1. Use the **Search** box for quick lookups by keyword, client name, or action ID.
2. To filter by dates:
   Use **Created date** to show actions logged within a specific time range.
   Use **Action Date** to display actions that were scheduled or performed during a chosen period.
3. Choose a **Type** (for example, *Note*, *Call*, or *Comment*). Once selected, the Subtypes selector becomes active.
   Subtypes are displayed grouped under each selected Type.
   You may select multiple subtypes across different Types.
4. Narrow results further by selecting **Creator**, **Responsible**, or **Client**.
5. Click **Apply** to refresh the table and show only actions matching your filters.
6. To clear all filters, click **Drop filters** on the right.
7. To reuse a specific filter setup later, click **Create view** and save your configuration.

Using Dynamic "Now" Presets
The date range picker supports dynamic time-based presets:

1. **Up to now** → Filters from selected start date until the current moment
2. **From now on** → Filters from the current moment forward

Important behavior:
"Now" is dynamic, not static.
The filter does not store a fixed timestamp.
Each time the filter runs, "now" resolves to the current system time.
Filters using "now" remain accurate after page reload or relogin.
aved views preserve the dynamic behavior.

> **Example use cases:**
> View all overdue actions (Action date → Up to now)
> View all future **scheduled** calls (Action date → From now on)

Type → Subtype Grouping Behavior
The Subtypes selector dynamically reflects the selected Types.

Behavior rules:

1. If no Type is selected → Subtypes selector is disabled.
2. If one Type is selected → Only that Type's subtypes are displayed.
3. If multiple Types are selected → Subtypes are grouped under each corresponding Type.
4. If a Type is unselected → Any previously selected subtypes belonging to that Type are automatically removed.
5. Selected subtypes display with their Type context (as defined in the UI design).

This grouping improves clarity and prevents ambiguity when filtering across multiple action categories.

Combine Multiple Criteria:
For example, to view all **"Note"** actions for **Client X** created last month by **Alice**, you would set:

1. **Created date:** March 1 – March 31
2. **Type:** Note
3. **Subtype:** Select the relevant subtype(s) under the chosen Type grouping (for example, Note → Internal).
4. **Client:** Client X
5. **Creator:** Alice

Click **Apply** to confirm and refresh the results.
The list will instantly update to show only records that meet all selected filters.

4. Clear or Adjust Filters:

Modify any field: Update any parameter (e.g., change date range or responsible user) and click **Apply** to refresh results.
Remove a single filter: Clear a selected value (click the "×" next to it) and click **Apply**.
Reset all filters: Click **Drop filters** on the right to clear all criteria and return to the full list of actions.
Save configurations: Click **Create view** to preserve the current combination for future use.

> **Note:** Filters using "now" remain dynamic and automatically update over time without manual adjustment.

5. Quick Search vs. Filter:

Use the **Search...** field at the top for fast text-based lookups (by keyword, client name, or ID).
Use **Fast Filters** for structured queries combining dates, action types, grouped subtypes, users, and clients — ideal when you need precise segmentation or multi-parameter filtering.

6. Column Customization

The Actions table allows you to customize visible columns.
Click **Customize columns** to show or hide specific fields and change their order.

Column settings apply to the current view.

> **Pro Tip:** Once you've dialed in your perfect filter combination, bookmark the URL in your browser. On revisit, the same filters will automatically load, giving you one-click access to your custom view.

With these controls, you can slice and dice your Action logs any way you like—by date ranges, responsible parties, action types, or clients—keeping you focused on exactly the records that matter.

8. How to Search the Actions Table

The **Search** bar lets you quickly find individual actions by typing keywords, UIDs, client names, or text snippets. Unlike filtering (structured queries by date, type, etc.), Search performs a free-text lookup across multiple columns in real time.

Search operates independently from Fast Filters and is not stored within saved filter configurations.

1. Locate the Search Bar: Above the **Actions** table, next to the **Filter** button, you'll see a rounded **Search…** input.

2. What the Search Covers
By default, typing into **Search** will match against these columns:

Column	Example Matches
UID	`ca00000u`, `CA000012`
Type	`Note`, `Call`, `Comment`
Client	Client's first or last name (e.g. "Smith")
Text	Any portion of the action's text body

> **Tip:** Search is case-insensitive and supports partial matches (e.g., "morga" finds "morgan").

3. Performing a Basic Search:
Click in the **Search…** field.
Type your query (e.g., `nicklaus` or `ca00000a`).
As you type, the table filters instantly to show only rows containing that term in any searchable column.

4. Combining Search with Filters:
Search + Filter gives you ultimate flexibility. For instance, you can:
1) Filter by **Type = Call** (show only calls).
2) Search for "xavier" to see only call records made to client *xavier*.

To clear the search, click the × icon inside the search field or press Esc. Clearing search does not affect structured filters.

Best Practices

1. **Start Broad**: Begin with a single keyword, then narrow using filters if needed.
2. **Use Unique Identifiers**: For exact lookups, searching by full **UID** is fastest.
3. **Partial Text Queries**: Enter part of a longer note or comment to catch all similar entries.
4. **Combine Terms**: While the search itself doesn't support multiple terms joined by AND/OR operators, you can type a phrase (e.g., `morgan invoice`) to match rows containing both words anywhere in the record.

With these steps, you can swiftly drill down to any Action—whether it's a specific note, call log, or comment—by simply typing in a few characters, making it easy to locate records without navigating through pages of data.

9. Configuring Action Subtypes

Subtypes let you further categorize each Action Type (e.g. Note, Call, Comment), enabling finer filtering, reporting, and visual cues throughout the UI.

1. Open the Actions Configuration:
In the left-hand sidebar, expand **Settings**.
Select **Configurations**.
At the top of the Configurations page, click the **Actions** tab.
You will see a section titled **Subtypes** beneath the list of other configuration blocks.

2. Overview of the Subtypes Block:
Displays each subtype's color swatch, name, and associated action type.
Includes **Edit** (pencil) and **Delete** (trash) icons on each row.

3. Add a New Subtype:
Click **+ Add** in the Subtypes section.
In the Add Subtype form:

1. **Type**: Choose the parent Action Type (e.g. Note, Call).
2. **Name**: Enter a descriptive label (for example, "Client Follow-Up").
3. **Color**: Pick a color swatch; this will highlight the subtype in tables and charts.

Click **Save**.
Once saved, your new subtype appears in the list and can be assigned to any action of that type.

4. Edit an Existing Subtype:
Locate the subtype you wish to modify.
Click its **Edit** icon.
In the Edit Subtype form, update the Type, Name, or Color.
Click **Save** to apply your changes.

5. Delete a Subtype:
Find the subtype row and click its **Delete** icon.
Confirm the prompt ("Are you sure?") by clicking **Delete**.

> **Tip:** Actions already assigned this subtype will not be deleted; they will simply have no subtype after removal.

6. Using Subtypes When Creating or Editing Actions

When adding a new Action:
Click **+ Add** on the Actions list page.
Select an Action Type first.
If that type has subtypes configured, a **Subtype** dropdown appears below.
Choose the proper subtype***(optional, action can be created without it)***, complete the rest of the form, and save.

When editing an existing Action:
Click the Edit icon (pencil) on the action's row.
The Subtype field shows the current setting (if any).
Change or clear the subtype as needed, then save.

With Subtypes configured, your Actions module now supports an extra layer of categorization—making day-to-day tracking and reporting even more powerful.