# Client Area

# 1. Client Area: Overview

The Client Area module provides a centralized place to register, configure, and manage every “front door” your customers use—whether that’s a CRM-powered personal dashboard, a white-labeled website, an online store, or any other custom endpoint. Each Client Area record captures metadata such as its name, type (e.g. “Personal Account,” “Web Shop,” “Mobile App”), URL, API credentials, and owner.

> **Integrated vs. Custom**
>
> **Integrated accounts** are personal dashboards created and hosted by us, fully embedded in the CRM.
>
> **Custom accounts** let organizations link their own external properties (e.g. a third-party ecommerce site) via API so they can surface and manage data directly from the CRM.

By storing these endpoints in one place, you can:

1. **Automate provisioning** of new portals via our REST API.
2. **Route support requests** to the correct site or application.
3. **Aggregate usage metrics** across multiple client-facing channels.
4. **Enforce consistent branding and access control** across all customer touchpoints.

> This data is used both by personal accounts that we have created and integrated into the CRM, as well as custom accounts. For example, if a user has their own account for a specific purpose and only needs the CRM, they can use this module to store and access information via API, utilizing it in their account.

The module includes the following sections:

1. Translations: Translations of elements used in your product.
2. Texts: Translations of texts used in your product. This and the previous section are useful for managing multilingual content.
3. Templates: Templates used in your product, e.g., for sending emails to clients.
4. Banners: Banners used in your product, e.g., for posting on websites.
5. Documents: Documents posted on your website, e.g., licenses.
6. Configurations: General settings of the Client Area module.

# 2. Client Area: Use Cases

**Use Case #1: Onboarding a New Customer Portal**

When a client launches a new branded dashboard, add a Client Area record (e.g. “Acme Client Portal”) with its URL and API credentials. Assign it to the client’s account so the portal can immediately read/write CRM data (tickets, orders, analytics) without any manual integration steps.

**Use Case #2: Linking Multiple Storefronts**

A merchant selling on Shopify and WooCommerce wants unified reporting. Create two Client Area entries (“Acme Shopify,” “Acme WooCommerce”) under the same owner. Both portals then push orders and customer interactions into the same client profile, giving your support and analytics teams a single source of truth.

**Use Case #3: Configuring SSO Endpoints**

Your organization supports SAML-based SSO for both web and mobile apps. In Client Area, register “Acme Web SSO” and “Acme Mobile SSO,” store their assertion consumer URLs and certificate fingerprints, and generate OAuth keys. Users signing in on either channel seamlessly authenticate against the CRM’s identity provider.

**Use Case #4: Driving Embedded Analytics Dashboards**

You’ve built a React widget that visualizes user engagement metrics. In Client Area, provision “Acme Analytics Embed,” supply its API token to the widget, and embed it in the client’s site. The dashboard pulls real-time KPIs (login rates, monthly spend) directly from the CRM without exposing any other data.

**Use Case #5: Automated Support Routing**

Your support org uses separate desks for “Web Support” and “Mobile Support.” Create Client Area entries for each app, tag them with their respective Desks, and set up your ticket form to include the Client Area identifier. Incoming requests automatically flow into the correct queue based on which portal the user submitted from.

# 3. How to Configure Client Area

The **Client Area** module lets you tailor how customers interact with your system—controlling everything from account settings and security policies to verification workflows and supported languages. This guide walks you step-by-step through every subsection of **Configurations**, with deep dives on each field, optional API hooks, and best-practice tips.

Basic configuration of the **Client Area** module is done through the **Configurations** section.

It includes the following subsections:

1. General
2. Documents
3. Verification Levels
4. Languages

## General Section

To start configuring, go to **Configurations > General** tab across the top. You will see two blocks: **Clients** and **Security**.

In the **Clients** block, you can configure:

1. **Number of accounts:** Enter the maximum number of accounts a single customer can have.
2. **Activate account right after creation:** Enable this to allow clients to activate their accounts immediately after creation.
3. **Demo account:** Enable this to provide clients with a demo account (e.g., with virtual assets).
4. **Personal manager:** Enable this to assign a personal manager to the client.
5. **Exchange with Two-Factor Authentication (TFA):** Require additional identity verification before any exchange.
6. **Withdrawal with TFA:** Require additional identity verification before any withdrawal.

> All these settings can also be managed via API, as many of them are specifically designed for integration and external use. You have full control over the configuration—use it as needed for your specific purposes.

In the **Security** block, you can configure:

1. **Session time minutes:** Define how many minutes of inactivity will trigger automatic logout. If left blank, the default is 60 minutes.
2. **Refresh session time minutes:** Define how often the session should be refreshed when the user is active. Normally twice the **Session time minutes** value.

Adjust timeouts to balance usability (longer sessions) against security (shorter sessions).

Click **Save** when finished.

## Documents Section

Configure verification documents required from your customers during login, verification, or other business purposes (e.g., some documents may be needed for identity verification, while others for approvals or compliance).

In the **Verification Documents** block, select the checkboxes next to the required documents:

1. Passport or ID
2. Bank card (front)
3. Bank card (back)
4. Source of funds

> **Use Case Examples:**
>
> - KYC Level 1: just Passport or ID
> - KYC Level 2: add Bank card, Source of funds

## Verification Levels Section

This section manages verification and includes the following blocks:

1. Account Configurations
2. Verification Levels (e.g., email, phone, biometrics)
3. Statuses

Account Configurations block:
**Open account right after sign up:** Check this if you want to open accounts automatically for new customers.
**Required level to create account:** Select a level from the drop-down list. Values are pulled from the **Verification Levels** section.
**Required status to create account:** Select a status from the drop-down list. Values are pulled from the **Statuses** section.
Click **Save** to apply changes.

**To add a new verification level:**

1. Click the **Add button** in the upper right corner of the **Verification Levels** block.
2. Select the **Type**: Personal or Business.
3. (Optional) Add custom fields in **Properties.**
4. Enter a unique **Label** for the level.
5. Then you can fill in custom fields, as well as **Title** and **Description** in different languages:
   In the **Language** field, select the target language.
   Provide custom fields in that language. Enter **Title** and **Description**.
6. To add the same level in a different language:
   In the **Language** field, select the target language.
   To copy fields from the original language, choose the language from the drop-down list and click **Clone**.
   Enter new values or use automatic translation with AI by choosing the languages **From** and **To** and clicking **Translate.**
7. Click **Save** to add the new verification level.
   To edit verification levels, click the **Edit** icon, but note that **Type** and **Label** cannot be changed.
   In the **Status** block, there is one default status, **Init**.

**To add a new status:**

1. Click the **Add button** in the upper right corner of the **Verification levels** block.
2. Enter **Label**, **Text**, and any necessary **Properties**.
3. Click **Save** to add the new status.

**To edit a status:**

1. Click the **Edit** icon in the corresponding row.
2. You can change **Text**, but not **Label** of the status.

**To delete a status:** Click the **Delete** icon in the corresponding row.

> **Note**: You cannot delete the default status.

## Languages Section

The **Languages** section is designed to manage the languages that are used in your product.

It includes two blocks:

1. **Available Languages:** All languages available.
2. **Active Languages:** Languages that are used.

To add a language from the list of available languages to the list of active languages:

1. In the **Available Languages** block, select the checkbox next to the language you want to add.
2. To make it easier to find the language you need, use the **Search** field. Start typing the name of the language, for example, German or Japanese.
3. Click **Save** to apply the changes.

> **Note**: The language will appear in the list of active languages, but will not yet be available for selection in your product. Before adding, it is recommended to translate items into that language. Refer to the [How to Manage Translations] and [How to Manage Texts] for more information.

When you have all the necessary texts and elements translated:

1. Go back to **Languages**.
2. In the **Active Languages** list, check the box next to the language for which you have added translations.
3. Click **Save**.

The **Configurations** section in **Client Area** empowers you to enforce policies, customize verification flows, and provide a truly localized experience—all on a per-project basis or globally via API. Regularly review these settings to adapt to evolving compliance requirements, new markets, or product enhancements. Once you’ve dialed in your ideal configuration, your customers will enjoy a seamless, secure, and fully branded journey through your CRM.

# 4. How to Manage Translations

The **Translations** module is your single source of truth for every short text element in the Client Area—buttons, labels, tooltips, error messages, and more. By centralizing all keys and their localized values here, you ensure consistency across the entire UI and make it easy to keep every language up to date.

To translate short elements (e.g., buttons), go to **Client Area > Translations**. You will see a list of all currently available items. The **Text** column will show in which language they are available.

## To add a translation of an element:

**1. Open the Translations table**
Go to **Client Area > Translations**. You'll see a paginated list of all keys (labels) and their current localized text.
**2. Locate the entry you want to update**
Scroll or use the search bar (see next section) to find the exact label.
**3. Click the ✏ Edit icon** in the Actions column. This opens the **Edit translation** drawer on the right.
**4. Select your target language**
At the top of the drawer, you'll see buttons for each **Active** locale (pulled from your Languages configuration). Click the one you need to update—for example, `Es` for Spanish.
**5. Clone translations from**
To copy all existing text from another language into your current locale (without translating), open the "Select" dropdown, pick the source language (e.g. English), and click **Clone**. This instantly duplicates those fields as-is.
**6. Translating flow**
To programmatically generate translations, click **Translate** in the drawer header, then choose your provider (OpenAI, etc.) from the **Integration** dropdown. The system will pull translated strings and populate every field.

> **Tip:** Cloning and translating are independent—feel free to clone first and then auto-translate, or translate first and use cloning to reset individual entries.

**7. Save your changes**
Hit **Save** at the bottom of the drawer. A success toast confirms the update—and the table immediately reflects your new string.

## To easily search for an element:

**Type in the Search field** at the top of the Translations page.
It filters by **Label** (the key) or by any snippet of **Text** in any language.
**Clear** the search box (×) to return to the full list.

> Note: Adding custom elements is intended for development purposes only. The translation object label should be added to the code by developers. Otherwise, if you add a label just with this functionality, it will not be displayed anywhere on the page.

## To add a custom element:

> **Important:** Before using this feature, your developers must have wired the new key into the front-end code. Otherwise the UI won't reference it, and your translations won't appear anywhere.

**1. Click the + Add** button in the top-right.
**2. Define your Label:** Enter a **unique identifier** that your code will reference (e.g. `checkout.confirmButton`).
**3. Choose one or more Languages:** Check the locales you want to initialize. Only **Active** languages appear here.
**4. Enter your Text for each:** For each selected language tab, fill in the string.
**5. Save:** Clicking **Save** creates the new row. Now developers can pull that key into the UI.

> You can also delete current items using the **Delete** icon. Before deletion, make sure you are no longer use the item in your product.

## Best Practices

**Consistent Label Naming:** Use a predictable case style (`camelCase` or `snake_case`) across all keys.
**Complete Every Locale:** When adding or editing, fill in *all* active languages to avoid fallbacks or missing copy.
**Leverage "Show All":** Always expand and scan every locale before saving to catch any stale or missing translations.
**Coordinate with Development:** New keys must be added to the codebase first—coordinate with your engineers to avoid orphan labels.
**Clean Up Periodically:** Remove unused or obsolete keys to keep the list lean and maintainable.

By following these steps and best practices, you can ensure that every button, message, and tooltip in your Client Area is accurately translated—and that your users enjoy a fully localized, consistent experience.

# 5. How to Manage Texts

The **Texts** section is where you handle longer content blocks—like notification bodies, modal descriptions, or legal disclaimers—that may require multiple fields (Title, Description, custom Properties) per language.

## Edit an existing text

1. To translate lengthy elements (e.g., notifications), navigate to **Client Area > Texts**. You will find a list of all the available texts in the system.
2. Click the ✏ **Edit icon** on the card you want to modify.
3. Select your target language in the drawer's **Language** selector
4. **Clone translations from**
   To copy all existing text from another language into your current locale (without translating), open the "Select" dropdown, pick the source language (e.g. English), and click **Clone**. This instantly duplicates those fields as-is.
5. **Translating flow**
   To programmatically generate translations, click **Translate** in the drawer header, then choose your provider (OpenAI, etc.) from the **Integration** dropdown. The system will pull translated strings and populate every field.
6. **Update fields:**
   **Title**: A concise headline or name for this text block.
   **Description**: Rich-text body (you can format, insert links, tables, etc.).
   **Properties**: Any custom JSON nodes or metadata your UI may consume.
7. **Save** your changes. The card will immediately reflect the updated Title/Description for that language

> **Tip:** Cloning and translating are independent—feel free to clone first and then auto-translate, or translate first and use cloning to reset individual entries.

## Search for a text

**Filter by label or content:** Type part of a **Unique label**, **Title**, or **Description** into the **Search…** field above the cards to narrow down the list.

## Add a new text and its translations

> **Developer note:** Before end users can see this text in the UI, your front-end code must reference the new **Unique label**.

1. Click on the **Add Text** button in the upper right corner.
2. **Define the Unique label**
Enter a machine-friendly identifier (e.g. `deposit.termsNotice`) and toggle **Locked** if you want to prevent accidental deletion.
3. **Configure Properties** (optional)
If your UI reads structured metadata, fill in any JSON nodes here.
4. **Select Language and Fill Content**
Click the language tabs (En, Es, Ru, Pl) to switch between locales.
For each, enter **Title** and **Description**.
5. **Save** to add the new card to the grid

By default, new texts are created as **Locked**—they cannot be deleted. To unlock a text:

1. Go to the text editing tab.
2. Uncheck the **Locked** checkbox.
3. Click **Save**.

## To delete text

Make sure it is not locked.
**Click the 🗑️ Delete** icon on the unlocked card and confirm the prompt.

## Best Practices & Tips

1. **Consistent Labeling**
   Group related texts under a common prefix (e.g. `notification.email.*`, `modal.confirmation.*`) for easier searching and organization.
2. **Lock Critical Texts**
   Keep frequently used or legal-critical messages locked to avoid accidental deletion.
3. **Use Clone for Speed**
   Cloning from your default locale saves time and ensures you don't forget fields.
4. **Review AI Translations**
   Always proof AI-generated translations for tone, context, and placeholders.
5. **Coordinate with Developers**
   Ensure any new labels are wired into your UI code—otherwise, the text won't show up even though it exists here.

With these steps and tips, you can keep your long-form UI content fully localized, well-organized, and under strict change control—ensuring a consistent experience across all languages and regions.

# 6. How to Manage Templates

The **Templates** section lets you create, organize, and maintain reusable communication assets—email bodies, PDF agreements, push notifications, etc.—that you send to your clients. All template content (Title, Description, Properties) can be localized for any active language in your system.

You can perform the following actions with templates:

1. Add
2. Search
3. Edit
4. Delete

## To add a template:

1. Click the **Add** button in the upper right-hand corner.
2. Fill in the form in the drawer:
**-Unique label**: a machine-friendly identifier (e.g. `user.welcomeEmail`).
**-Active**: toggle on if you want this template immediately available for sending.
**-Properties**: (optional) populate any JSON nodes your UI or API needs.
**-Language tabs (En, Es, Ru, Pl)**: switch between locales and enter:

1. **Title**: short summary or subject line (e.g. “Welcome to Our Service!”).
2. **Description**: full template body (supports rich text, links, placeholders).

You can do this for all languages you have set in Configurations.
3. **Save** to create the template. It now appears as a card in your grid, marked “Active” if you toggled it on.

## To search for a template:

**Filter the list** by typing part of the **Unique label** or **Title** into the **Search…** field above the grid. Results update in real time, making it easy to find specific templates among many.

## To edit a template:

1. Click the ✏ **Edit icon** on the template card.
2. Modify any fields in the drawer—**except** the Unique label (locked). You can:
-Toggle **Active** on/off.
-Update **Properties** JSON.
-Switch languages and edit **Title** or **Description**.

-Use **Clone** to copy from the default locale, or **Translate** for AI-assisted localization.
3. Click **Save** to apply the changes.

## To delete a template:

1. Ensure the template's **Active** toggle is **off** (via Edit).
2. Click the 🗑 **Delete** icon on the card.
3. Confirm deletion in the prompt. The template is permanently removed.

> Note: You can only delete templates that are not active.

## Best Practices & Tips

1. **Consistent Naming**: Group similar templates under a shared prefix (e.g. `invoice.*`, `reminder.*`, `passwordReset.*`).
2. **Active vs. Inactive**: Deactivate (don't delete) templates you no longer use to preserve history while preventing accidental sends.
3. **Localize Early**: Add translations as you create the English version to ensure coverage for all target markets.
4. **Use Properties Sparingly**: Store only metadata your front-end or automation jobs require; keep JSON lean.
5. **Version Control**: Though you can't version inside the UI, consider appending timestamps or version numbers to your Unique labels for major overhauls (e.g. `welcome_v2`).

By following these steps and guidelines, you'll maintain a clean, searchable library of communication templates—fully localized and ready for automated or manual dispatch.

# 7. How to Manage Banners

The **Banners** section lets you upload, localize, and control the display of your website's header graphics across multiple screen resolutions and languages.

The **Banners** section is designed to store banners for your websites. In this section, you can:

1. Add banners for different language versions of the website.
2. Add banners with different resolutions.
3. Add descriptions to the banners.
4. Activate and deactivate banners.
5. Delete banners.

## To add a new banner:

1. At the top of the page, click the language tab (English, Bulgarian, Spanish, etc.) to switch to the version of your site you're editing (e.g., "English" is highlighted when active).
2. Drag the image or click to view the images on your computer in the block with the appropriate resolution. The available resolutions are:
   1444 to 1920 px
   1024 to 1444 px
   640 to 1024 px
   375 to 640 px
3. Upload images for all resolutions.

If you need alt-text or contextual notes:

1. Click the **+ Add description** button in the top-right corner.
2. A description field appears under each banner slot—enter your text (e.g., "Homepage hero for summer campaign").
3. Descriptions are per-language, so switch tabs to localize.
4. **Activate** the entire set by checking the **Active** toggle in the upper-left.
5. **Deactivate** by unchecking it—this hides all banners for that language until you're ready to go live.

> Note: Banners can only be activated once they are set for all resolutions.

To update one resolution:

1. Hover over the banner slot and click **Delete** (□□) in its top-right.
2. Upload a new image into the now-empty drop zone.

You can delete any single slot independently without touching the others.

## Best Practices & Tips

1. **Consistent Styling:** Use a single design template cropped to each resolution, rather than entirely different visuals—this preserves brand style across devices.
2. **Optimize File Size:** Compress images to balance quality and load speed (aim for ≤ 150 KB per banner).
3. **Test Viewports:** After uploading, preview in different browser widths to confirm the correct banner is served.
4. **Language Checks:** Always switch tabs and proof your **descriptions** and any embedded text on the banners themselves.
5. **Version Control:** When replacing assets, keep old files archived locally in case you need to roll back.

By following these steps, you’ll maintain a responsive, localized banner library that adapts beautifully across devices and languages.

# 8. How to Manage Documents

The **Documents** section lets you store and control downloadable files on your site—PDFs, licenses, whitepapers, etc. You can **add**, **search**, **edit**, and **delete** documents from a single table interface.

You can perform the following actions with documents:

1. Add
2. Search
3. Edit
4. Delete

## To add a document:

1. **Open the Add Panel**
   Click the **+ Add** button in the upper-right corner of the Documents page.
2. **Fill in the General Info**
   **Name**: Enter a unique identifier (e.g. "License Agreement 2025").
   **Active**: Check this box if you want the document immediately available on your site.
3. **Provide the File**
   **Paste the Link**: If your file is hosted externally, paste its full URL (must begin with `http://` or `https://`).
   **Attach a File**: Drag a PDF into the drop zone or click to browse your computer. Only **.pdf** is accepted.
4. **Save**
   Click **Save** to upload and register the document in the list.

> *Tip*: Use clear, consistent naming (e.g. `Terms-of-Service-2025.pdf`) so it's easy to find later.

## To search for a document:

**Quick Filter**: Start typing any part of the document's **Name** in the **Search…** field at the top. This instantly narrows the table to matching entries.

## To edit a document:

1. **Open the Edit Panel**
   Click the **Edit (✎)** icon in the Actions column next to the document you want to update.
2. **Make Your Changes**
   **Rename**: Update the **Name** field as needed.
   **Swap File**: Paste a new link or drag in a new PDF.
   **Active Toggle**: Enable or disable visibility on your site.
   **Description/Content**: Use the rich-text editor under Name to add or modify any explanatory text.
3. Click **Save** to apply your edits. The table will refresh showing the updated link or status.

> *Version Control*: When uploading a new PDF version, consider appending a date or version number to the file name so users and developers can track changes (e.g. `Product-Guide-v2.pdf`).

## To delete a document:

1. **Ensure Inactive:** You cannot accidentally delete a file still marked **Active**—first uncheck the Active box in the Edit panel and save.
2. **Remove:** Click the **Delete (□□)** icon next to the document. Confirm the prompt to permanently remove it from the system.

> **Warning**: Deleted documents cannot be recovered from the UI. Always keep a local backup if you might need to restore it later.

## Best Practices & Tips

1. **File Size & Performance:** Keep PDFs under **5 MB** when possible. Large files can slow page load and frustrate users.
2. **Consistent Naming:** Adopt a clear naming scheme: `<Category>-<Year>-<Version>.pdf` (e.g., `Privacy-Policy-2025-v1.pdf`).
3. **Clear Descriptions:** Use the rich-text **Description** field to summarize the content or add important notes (e.g., “Supplier contract—effective Feb 2025”).
4. **Audit Regularly:** Periodically review your Documents list to remove outdated or superseded files—this avoids confusion and broken links.
5. **Access Control:** Only users with appropriate permissions should be able to add or delete documents. Coordinate with your development or admin team if needed.

By following these steps and best practices, you’ll maintain a tidy, up-to-date library of downloadable content that’s easy for both admins and end-users to navigate.