Desks

1. Desks: Overview

Desks are the core building blocks of your Projects in Wifox Business Core Solution, providing fine-grained structure and access control. Think of each Desk as a “room” inside your Project where related activities, people, and clients live together. Key characteristics:

Default Desk: Every new Project automatically comes with one Default Desk. This ensures there’s always at least one workspace ready to use.

Unlimited Expansion: You can spin up as many additional Desks as needed—no hard limits.

Assignments:
Clients: Attach any number of clients or leads to a Desk. Only the employees assigned to that Desk (or holding appropriate “view all” permissions) can see and work with those clients.
Employees: Grant employees access by adding them to a Desk. They inherit any Project-level rights, plus Desk-specific rights (view own/all, manage own/all).
Manager Tagging: Within each Desk, you can tag one or more employees as “Manager” for a given client. That manager becomes the primary point of contact and can receive notifications, see all actions, and edit that client’s records.
Permission Inheritance & Isolation: Desks inherit overall Project settings (e.g., enabled modules), but enforce isolation of data—users who only have desk-level access cannot see clients or actions in other Desks unless explicitly granted “view all” or “manage all.”

The following actions are available in the Desks module:

1. Creation
2. Editing
3. Deletion

2. Desks: Use Cases

Use Case #1: Managing Offices in Different Countries

Desks can be used to manage various offices across different locations or cities within the same country. For example, you can create separate desks for your offices in different cities or regions. If needed, you can isolate clients and ensure that employees from one office only see and interact with their local clients.

Use Case #2: Managing Different Departments

Desks can help streamline client workflows across multiple departments. For instance, a client can first be assigned to the Sales department (Desk), and once the sale is complete, the client can be transferred to the Retention or Analytics department. This helps ensure that each department has clear visibility into the clients they are responsible for at any given stage.

Use Case #3: Lead Segmentation by Source

If you have multiple sales channels, such as social media, website leads, and ads, you can use desks to segment clients based on their source. You can create separate desks for each channel, ensuring that clients are categorized accordingly. This process can also be automated through API integration, making lead segmentation more efficient and less prone to errors.

Use Case #4: Product or Service Lines

If your company sells multiple product lines (e.g., “Corporate Loans,” “Retail Banking,” “Wealth Management”), spin up a Desk for each. Product-specific teams only see those clients and documents—preventing mix-ups and ensuring tailored service.

Use Case #5: Seasonal or Promotional Campaigns

For time-bound initiatives (e.g., “Holiday Promo Q4,” “Summer Flash Sale”), create temporary desks. Staff can be assigned to these desks for the campaign’s duration, then archived or deleted once complete, keeping your core desks clean.

Use Case #6: Multi-Channel Support

Separate desks by support channel: “Email Support,” “Phone Support,” “Live Chat.” Assign different SLAs, notification rules, and managers to each desk to align with channel-specific workflows and tooling.

Use Case #7: Pilot & QA Environments

Mirror your live environment under a “Staging” desk. QA engineers can import dummy clients, test new automations, and run calls without affecting production data. Once tested, you delete or reset the staging desk.

Use Case #8: Partner Onboarding & Sandboxes

Create desks like “Partner API Sandbox” or “Integration Pilot.” Issue limited-scope API tokens and access for external partners; they can only operate within that desk and never touch your real customer data.

3. How to Create a Desk

Desks in Wifox Business Core Solution are the building blocks of your organizational structure within each Project. Think of a Desk as a department, office, or specialized workstream—such as “Sales,” “Support,” or “Analytics.” By creating multiple Desks, you can keep client data, employee assignments, and workflows neatly separated, ensuring that each team only sees and manages the records relevant to their function.

1. Open the Desks Module
In the left-hand navigation menu, click **Desks** (icon of interconnected nodes). The main grid displays every existing Desk, including its Name, parent Project, and quick-action icons.

2. Click “+ Add”
In the top-right corner of the Desks screen, click the **+ Add** button. The “Add desk” form will slide in, ready for your input.

3. Complete the General Section

Name
The human-readable title for the Desk (e.g., “Support Queue” or “NYC Sales Team”).
Importance: Appears throughout the UI wherever this Desk is referenced. Choose a clear, descriptive name.

Project
The parent Project under which this Desk belongs.
Action: Click the dropdown and select the appropriate Project. This links all Desk data (clients, actions, employees) to that Project’s scope.

Review the Members Panel
To the right of the General fields is the **Members** section, which initially shows **No members**. You cannot add employees until the Desk exists.

> You will also see the **Members** tab here, but you will only be able to add new members to the desk in the Edit mode.

Save Your New Desk
Once you’ve entered Name and Project, click the green **Save** button at the bottom-left. Your form will close, and the new Desk appears in the grid, ready for further configuration.

4. How to Edit a Desk

In Wifox Business Core Solution (WBCS), **Desks** are the logical work-areas—departments, offices, or channels—within each Project. After you create a Desk, you can fine-tune its settings, manage which Employees belong there, or delete it when it's no longer needed. Follow the detailed instructions below.

After creating a desk, the editing window will open automatically.

In the Edit window, you can:

1. Change the name of the desk.
2. Add or delete members of the desk.

Why You Might Edit a Desk

Reflect a team change: Your "Support Queue" Desk might become "Customer Success" after your support model evolves.
Reassign personnel: When an employee moves from Sales to Retention, you remove him/her from the Sales Desk and add to Retention.
Audit access: Periodic reviews ensure only active, authorized staff remain on critical teams.

Before You Begin

Only Desks you've manually added can be deleted; every Project retains its one Default Desk.
To add someone here, they must already exist in the parent Project (see **Projects → Employees**).

Step 1. Open the Desks Module
In your left-hand menu, click **Desks**.
You will see a card for each Desk, organized by Project.

Step 2. Enter Edit Mode
Hover your mouse over the Desk you need to change.
A small pencil icon appears in its top-right corner—click it to open the edit panel.

***Tip**:* If you don't see the icon, ensure you have the "manage own" or higher permissions on that Desk.

Step 3. Rename the Desk
In the edit form's **General** section, locate the **Name** field.
Replace the existing text with your new Desk name.
Example: Change "Support Queue" → "Customer Success."

This new label will appear everywhere—lists, dropdowns, reports.

Step 4. Verify the Project
Directly beneath the Name, the **Project** dropdown shows where this Desk lives.
This value is read-only: you cannot move a Desk to another Project.
If you need a Desk in a different Project: create a new Desk there instead.

> **Note:** The list consists of members who are included in the connected project. To add a new user to this list, go to the Projects tab and add the member to the relevant project.

Step 5. Filter Existing Members
On the right, the **Members** panel lists current Desk members.
Use the **Search** box at its top to type any employee's name or email.
The list instantly narrows to matching entries—ideal for large teams.

Step 6. Add New Members
Click the **+ Add member** button in the Members panel.
A slide-out appears showing every Employee in the parent Project.
Example: If you're editing the "Retention" Desk in "Acme USA," you'll see all "Acme USA" staff.

Step 7. Grant Access
In that slide-out, click the icon next to any Employee to add them.
They immediately appear in the Members list and gain access.
Practical note: New members can now see all Clients, Requests, and Actions tied to this Desk.

Desk Membership & Data Visibility
Desk membership directly impacts data visibility across the system, including Clients, Requests, and Transactions.
Access to transactions is governed by role permissions combined with Desk assignment:

1. Users with **View own desks** permission can only see transactions related to Desks they are assigned to.
2. Users with **View all desks** permission can see transactions across all Desks.
3. If a user is removed from a Desk, they immediately lose access to data associated with that Desk (subject to their role permissions).

Transaction visibility is enforced at backend level and follows the same authorization logic used across Clients and Projects modules.

Step 8. Save Your Changes
After renaming and member adjustments, click **Save** at the bottom-left.
All edits apply instantly: teammates can refresh and see the new Desk name or membership.
Confirmation: You'll see a brief "Changes saved" banner.

Step 9 Quickly View Members (without Editing)
Back on the main Desks grid, hover any Desk card.
Click the **Show members** icon to get a read-only peek at its roster.
Use this to audit who’s on each team without risking accidental changes.

Step 10. Remove an Existing Member
In the Members panel, find the Employee you want to remove.
Click the trash icon beside their name.
They lose access to this Desk—useful when someone leaves the team.

Following these detailed steps and considerations ensures that your WBCS environment stays organized, secure, and aligned with your company’s evolving team structures.

5. How to Delete a Desk

When to Delete a Desk

1. You ran a pilot “Beta Test” Desk that never went live.
2. You permanently closed one of your “Office” desks.

> **Deletion is permanent:** All membership links and any Desk-specific workflows disappear. Only manually created Desks can be deleted; you cannot remove a Project’s Default Desk.

Step 1. Locate the Desk
In the Desks module, find the card for the Desk you wish to remove.

Step 2. Initiate Deletion
Hover over that card and click the **Delete** icon in the top-right corner.

Step 3. Confirm Permanently
A modal appears warning you: “**Are you sure?**”
Click **Confirm** to proceed, or **Cancel** to back out.

Step 4. Post-Deletion Cleanup
Any Clients still assigned to that Desk automatically fall back to the Project’s Default Desk. Review your Default Desk to reassign those Clients or move them to another active Desk.

Best Practices & Tips

Rename vs. Delete: If the Desk’s purpose changes, prefer renaming and updating membership to preserve history.
Regular Audits: Monthly, use the Show members view to verify only current employees retain Desk access.
Pre-Deletion Reassignment: Before deleting, move high-priority Clients or Requests elsewhere to avoid workflow disruption