

# Getting started

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# 1. What is WBCS (Wifox Business Core Solution)

WBCS is a versatile finance-focused solution (Customer Relationship Management) system that can be adapted for various purposes, including sales.

The system is designed for any organization that needs to manage complex client relationships and financial data. The users of the system include sales, marketing, financial, and project managers, as well as IT administrators.

WBCS supports multilingual configurations, allowing it to be adapted to any language. The system incorporates robust security features, including two-factor authentication.

## Main Functionality


The WBCS system provides tools and features for:

1. Project management
2. Client management
3. Financial management
4. Customer platform management

These tools and features are organized across eight modules: Projects, Desks, Employees, Clients, Requests, Roles, Client Area, Core Banking, and API. Additionally, Wifox Business Core Solution can integrate with third-party platforms for a variety of tasks, such as automated translations, financial transactions, and custom API integrations.

## AI Assistant

WBCS includes a built-in AI Assistant - that you can use to get instant answers and step-by-step guidance anywhere in the system.

**Where to find it:** Look for the floating  chat icon in the bottom corner of every page (near the main content area).

### What it does:

Ask any question about using WBCS (“How do I create a new project?”, “Where do I edit affiliate hub postbacks?”, etc.)

Receive concise explanations, walkthroughs, and contextual tips without leaving your current screen

Browse suggested help topics or type your own query.

# 2. WBCS Modules and Their Relationship

The main module of the WBCS system is **Projects**. The current active project is always displayed at the top of the drop-down menu, allowing you to track which project you're working on easily.

The **Projects** module is directly linked to the following modules:

1. **Desks:** Multiple desks can be assigned to a single project. When a new project is created, a default desk is automatically generated.
2. **Employees:** Employees are assigned to specific projects and desks. Before an employee can be deleted, they must be removed from both the desk and the project.
3. **Clients:** Clients are associated with projects and desks. Clients are primarily associated with projects but could be assigned to a specific desk and/or to a specific manager (employee).

The following modules are partially dependent on the **Projects** module and other modules:

**Requests:** Support tickets and service requests may apply to an entire project or be tied to a specific client within that project, enabling flexible issue tracking.

**Core Banking:** Manages a project's financial entities (Accounts, Assets, Transactions) and lets you define project-specific ledger settings (Actions sub-types, auto-increment UIDs).

**Client Area:** Powers the customer-facing portal (webstore, client dashboard) with project-scoped content and embeddable Snippets.

**Configurations (Marketplace):** Houses project-scoped reference data (status lists, account types, currencies) that you can clone from other projects for fast setup.

**Marketplace → Products / Orders / Payment Methods / Integrations:** Catalog modules where each product, order, payment method and integration record is scoped to a project for isolated management.

**Roles:** Defines View/Manage permissions (own vs. all) within the context of the active project, ensuring access control is project-aware.

**API:** All external integrations and webhooks (Postbacks, Fireblocks, Huntli, etc.) operate under the selected project, so calls and events are correctly routed.

**Translations / Texts / Templates:** Localizes UI labels, longer text content, and notification templates on a per-project basis to support multi-lingual deployments.

**Analytics:** Dashboard metrics (Turnover, Clients Registered, FTD, Manager Performance, etc.) are calculated for the currently selected project.

**Calendar / Notifications:** Events (Calls, Reminders) and in-app notifications are tied to both employees and the active project, ensuring timely alerts.

**Incident Reports / Violation Reports / Penetration Reports:** Security modules for logging,

tracking and closing incidents, policy violations and pen-tests, all linked to the relevant project.

**Pipelines:** Displays CI/CD run histories (Jenkins, GitLab CI, etc.), project-by-project, so build and deployment statuses are scoped correctly.