

1. Clients: Overview

The **Clients** module is designed to grant access to all clients stored within the CRM, based on your access permissions. Depending on your role, you can view clients linked to specific desks or projects.

You can assign a client to a project, and then optionally assign them to a desk and manager. The manager must be assigned to the project and desk to which the client is assigned.

Key features:

1) Scoped Visibility

Clients belong to one Project (required) and optionally one Desk. You only see clients in Projects/Desks you're assigned to.

2) List View & Search

Columns: Name, Contact, Status, Manager, Project, Desk, Dates.

Sort by any column; Search by name, email, company; Filter by Project, Desk, Manager, date range, or custom tags.

3) Ownership & Routing

Assign a Manager (must be in the same Project/Desk) to drive notifications and accountability. Reassign Desk or Manager as clients progress through workflows.

4) Client Detail Page

General Info, Assignments, Status toggle, Meta tags.

Activity Feed: Actions, Requests, Notes.

Related Records: Tickets, transactions, integrations.

5) Bulk & Import

CSV/XLSX import with field mapping.

Mass actions: reassign, retag, status changes, batch emails.

6) Audit & Integrations

Full change history for compliance.

API & webhook support for automated workflows.

This module keeps every client record organized, secure, and visible only to the right teams.

The following actions are available in the Clients module:

1. **Creation:** Adding new clients and filling in personal, billing and affiliation information.

2. **Editing**: Modifying existing client information, adding new details, including actions and requests, and uploading client documents.
 3. **Reassigning**: Reassigning multiple clients to projects and desks.
 4. **Filtering and Searching**
 5. **Deactivation**: Disabling client accounts while retaining their information in the system.
 6. **Import**
 7. **Export**
 8. **Columns Customization**
 9. **Managing Favourite Clients**
 10. **Clients Duplicates**
 11. **«Send a Message» Action**
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