10. How to Customize Columns

The Columns customization allows you to customize the order and visibility of columns. This helps you focus on specific data fields (e.g., ID, Country, Type) that are most relevant to you.

Why Customize Columns?

1. **Focus on Essentials**
   Hide fields you rarely use (e.g. “External ID” or “Registration IP”) so your eye lands on high-priority data like Email, Phone number, or Verification status.
2. **Boost Readability**
   Reducing visual noise speeds up scanning and reduces mistakes when you’re sorting or reviewing long lists.
3. **Tailor Your Workflow**
   Move “Desk” next to “Manager,” or “State” right after “Type”—whatever sequence best matches your daily tasks.

Use Cases

1. **Onboarding Review:** Show Name, Email, Desk, Status → Quickly verify new accounts and assignments.
2. **Compliance Audit:** Show ID, Verification Level, Logs → Surface the data needed for KYC/AML checks.
3. **Regional Reporting:** Show Country, Created Date, Manager → Analyze geographic distribution and ownership.
4. **CEO Snapshot:** Show Email, Full Name, Account Status → Provide a concise overview of client health.

Action-Based Date Columns

The Clients table includes action-driven date columns that help managers track recent activity and upcoming follow-ups directly from the client list.

Last action date:
Displays the date and time of the most recent **completed Action** associated with the client.
Only Actions marked as *Completed* are considered.
If a client has no completed Actions, the column remains empty.

Future action date:
Displays the date and time of the **nearest Action that is not completed**.
The date is shown even if it is already in the past, as long as the Action remains in *Not completed* status.
This allows managers to quickly identify overdue follow-ups directly from the Clients table.

Both columns:
Are independent from the “Actions exist” indicator column, which only reflects the presence of at least one Action
Can be shown or hidden via column customization
Support sorting
Are calculated automatically based on the client’s Actions

Duplicate Detection Date Column

In addition to action-driven dates, the Clients table also supports visibility of duplicate detection activity.

Last duplicate date:
Displays the date and time when the client was most recently detected as a duplicate during registration or system validation.
If the client has never been flagged as a duplicate, the column remains empty.

Behavior:
The value updates automatically each time a duplicate detection event occurs for the client.
Non-duplicate registrations do not modify this field.

This column:
Can be shown or hidden via column customization
Supports sorting (ascending / descending)
Uses the same date-time format as other CRM date columns
Is available in Customize columns

This allows managers to quickly identify recently flagged duplicates and monitor data quality trends directly from the Clients table.

Actions Exist Indicator Column

The Clients table includes a boolean activity indicator column:

Actions exist
This column shows whether the client has at least one Action created in the system.

Display:

□ – Client has one or more Actions
□ – Client has no Actions

Behavior:

The value updates automatically:

1. When the first Action is created → indicator becomes □
2. When the last remaining Action is deleted → indicator becomes □

The value is stored persistently on the Client record and does not require recalculation on each table load.

This column:

1. Can be shown or hidden via column customization
2. Supports sorting (clients with actions first or last)
3. Works independently of visibility — filtering by “Has actions” remains functional even if the column is hidden

This allows managers to instantly distinguish active clients from those with no recorded operational activity.

How It Works

1. Access the Columns Panel:
Click **Columns** in the top toolbar of the Clients page.
A slide-out panel titled **Customize columns** appears on the right.

2. Show/Hide Columns Using Toggles:
Each available column is listed with an On/Off toggle.
On (green) = column will display in the table.
Off (grey) = column is hidden.

> **Tip**: Required/system fields (like Email or ID) may be non-toggleable or locked in the list.

3. Reorder Columns:
Look for the “drag” handle (⋮ ⋮) on the left of each toggle row.
Click-and-hold that handle to drag the field up or down in the list—this sets its left-to-right position in your table.

> **Note:** You can often click and drag this handle to rearrange the order in which columns appear in the Clients table.

4. Save Your Changes:
After adjusting the toggles (and reordering if needed), remember that some columns are unable to move because of their fixed position in the table (these columns are marked accordingly).

> **Note:** Once you’ve made your changes, click the **Save** button at the bottom of the panel. This ensures your customized layout is applied.

5. Instant Table Update: The panel slides away and your Clients table immediately refreshes to match your selections.

Pro Tips

1. **Personal vs. Global Views**
   If your workspace supports it, save your column layout as a personal default without affecting colleagues’ views.
2. **Revert to Defaults**
   If you ever need to reset, simply open **Columns** again and click **Reset** (if available) or turn all toggles back on then rearrange.
3. **Combine with Filters**
   For maximum efficiency, first apply a filter (e.g. show only “Pending” clients), then customize columns to focus on the data fields most relevant to that subset.

Customizing your columns transforms the Clients table from a static report into a dynamic dashboard tailored to your role. By hiding distractions, promoting key fields, and arranging columns in your ideal sequence, you’ll navigate your client data faster, make fewer errors, and stay focused on what matters most. Experiment with different layouts and use cases—you’ll likely find that a small tweak in column settings leads to big gains in productivity.

Revision #40
Created 26 February 2025 14:15:12
Updated 6 March 2026 18:02:45