# 3. Clients Actions Module

The **Clients Actions** module provides a centralized, read-only view of every action (notes, calls, comments, etc.) logged against your clients—across all projects and desks. It reuses the same columns, sorts, filters, and row-actions you already know from the Clients tab, but consolidates all client actions in one place.

## 1. Accessing the Clients Actions Module

**Open the Main Menu:** Click the ☰ icon (top-left) to expand the navigation panel.
**Navigate to Clients → Actions:** Under the **Clients** group, click **Actions**.

## 2. Module Layout

### 2.1 Header Controls

| Control | Description |
| --- | --- |
| **Filter** | Opens the right-side drawer to apply granular filters on any column. |
| **Search** | Free-text search box that filters rows by matching Creator, Client, or Text fields. |
| **+ Add** | (Optional) Opens the “Add Action” form—create a new note/call/comment record for a client. |

### 2.2 Actions Table

The table columns mirror those in the Client Details tab:

| Column | What It Shows |
| --- | --- |
| **Action date** | When the action actually took place (if set). |
| **UID** | System-generated unique ID (auto-increment). |
| **Type** | Category of action (Note, Call, Comment). Click to open its detail panel. |
| **Subtype** | Secondary classification (if configured under Settings → Configurations → Actions). |
| **Client** | Client name (link to their profile). |
| **Project** | Project or desk context for this action. |
| **Creator** | User who logged the action. |
| **Created** | Timestamp when this record was first saved. |
| **Updated at** | Timestamp of the most recent edit. |
| **Text** | Brief description or note content. |

| Column | What It Shows |
| --- | --- |
| **Actions** | ✏ **Edit** — open the record for modification |

**3. Sorting:**
**How:** Click on a column header (e.g. UID, Created, Type).
**Why:** Quickly jump to newest/oldest actions or group by Type/Client.

**4. Searching:**
**Scope:** Matches Creator, Client name, and Text.
**Behavior:** As you type, the table filters in real time—no need to hit Enter.

**5. Filtering:**
**Open Filters:** Click the **Filter** button to slide in the filter drawer.

**Available Filters:**
**Created date**: “From → To” picker
**Creator**: dropdown of system users
**Type**: select one or more action types
**Subtype**: select one or more configured sub-categories
**Client**: pick specific clients
**Project**: filter by project/desk
**Action date**: when the event actually occurred

**Apply or Clear:**
**Save** applies all chosen criteria and closes the drawer.
Remove individual filters by clicking the “×” on their badges above the table, or reopen the drawer to clear all.

**6. Row Actions:**
**Edit** (✏): Opens the familiar “Edit Action” form where you can adjust Client, Type, Subtype, Text, Action Date, and Responsible.
**Delete** (□□): Prompts **“Are you sure? Cancel | Delete”** to guard against accidental removals.

**7. Improved Navigation**
To streamline daily workflow, the Clients Actions module supports faster cross-navigation between Actions and Clients.

**Open Client in a New Tab**
You can open a client profile without losing your position in the Actions list:

1. Hold **Ctrl (Windows/Linux)** or **Cmd (macOS)**
2. Click the **Client name** in the table

The client profile will open in a new browser tab.

This allows you to:

1. Review client details
2. Edit client information
3. Return to your filtered Actions list instantly

**Return to the Actions List**
When opening an action or navigating into a client profile, use the **Back to Actions** button to return directly to the previously filtered list.

Your:

1. Filters
2. Sorting
3. Page number

remain preserved for seamless workflow continuity.

**8. Next Steps:**
**Review or Update Subtypes:** If you need more granular action categories, go to **Settings → Configurations → Actions**, switch to the **Subtypes** tab, and add/edit your Subtype definitions (Type, Name, Color).
**Log New Actions:** Use **+ Add** to record client engagements as they happen—then come back to this module for a full audit trail.
**Combine Search + Filters + Sort:** For powerful cross-project analysis—e.g., find all “Call” actions for “Acme Corp” in the last 30 days, sorted by Action date.

With the **Clients Actions** module in place, you gain full visibility and control over every touchpoint with your clients—centralized, sortable, searchable, and filterable exactly like your Clients list.

---

Revision #5
Created 20 May 2025 07:27:57
Updated 11 February 2026 10:56:04