3. How to Create a Client

Use the Clients module to add key contacts or corporate accounts into Wifox. Depending on your business model, you can onboard **Business** clients via a guided wizard (including company details, ultimate-beneficial-owner, and additional contacts), or quickly spin up **Personal** client profiles in one screen. By following these steps—and matching the “Step #” callouts in your UI—you’ll ensure every client is correctly profiled, assigned to the right Projects & Desks, and ready for your team to engage.

Client profiles are automatically created when they register on your site.

1. Open the Clients Module
In the left sidebar, click **Clients**.

You’ll arrive at a table showing all existing clients, with columns for:

1. **Email**
2. **ID** – The database record ID.
3. **UID** – System-generated unique client identifier (auto-increment).
4. **Full name**
5. **Phone number**
6. **Type**
7. **Country**
8. **Comments**
9. **Desk**
10. **Status**
11. **Actions** (Edit, Send a message, Change project)

> **Note**: When you open a client’s detail drawer (by clicking their email or the ✏ Edit icon), the header shows the client’s Name • UID (e.g. `Alex N• UID: C00004P`), so you always have both their display name and unique identifier at a glance.

2. Launch the “Add Client” Menu
In the top-right corner of the Clients list, click + Add.

3. Choose Client Type
From the dropdown, select either Business client or Personal client.

Create a Business Client

Step 1 — Add Company Information:
Company name: Enter the legal entity name as registered.

Company ID: Your internal reference or system code.
Company VAT: VAT/tax registration number.
Established: Use the date picker to record the incorporation date.
Country: Choose from the list.
City, **Address**, **Postal code**: Fill in the billing address fields.
Company logo (optional): Drag-and-drop or browse for an image file.
When all fields are complete, click **Next →**.

Step 2 — Add Director (UBO)

> **Note:** Toggling the Allow checkbox at the top of the "Add director (UBO)" form will expand the Credentials fields below (email, password), letting you edit or enter those values for the UBO.

2.1 Assign an Existing Client as Director
Select the "Assign Director from the existing clients" card – it will be highlighted in green.
In the Client ▼ dropdown, start typing the name or email of an existing client. A filtered list appears; click the one you want.
(Optional) Click View & Edit Info to review or change that client's personal details in a pop-over.
Once selected, the Personal, Affiliation, and Credentials panels below will auto-populate.
If you need to override or complete any fields (e.g. add an email or password), check the Allow box at the top of the form, then edit those fields directly.

2.2 Create a New Client as Director
Click the Create a new client for director card on the right.
A blank Personal panel appears below (just like when adding a personal client).
Fill in First name, Last name, Email, Password, and any other required fields.
Complete the Affiliation panel by choosing the company's Project and Desk for this director.
Click Save (bottom-left) to create that client and set them as your UBO.
When you've picked or created the UBO, use the Next → button (top-right) to proceed to adding additional members.

Step 3 — Add Members
In the Clients panel, search or scroll to find additional client contacts.
Click each name to move them into the Members panel.
For each member, toggle between RO (read-only) and RW (read-write), or click the trash icon to remove.
Click Next → to finalize.

Create a Personal Client

Once you've chosen Personal client, the full "Add client" form appears on a single page. It's organized into 7 panels:

Personal (Step 1)

1. **Type**: Pre-set to Personal and cannot be changed.
2. **First name**: Enter the client’s given name.
3. **Last name**: Enter the client’s family name.
4. **Phone number**: Primary contact number.
5. **Additional phone number**: Secondary contact number (optional).
6. **Date Of Birth**: Use the date-picker to select.
7. **External ID**: Any external reference or CRM ID.
8. **Passport**: Passport or government ID number.
9. **Nationality**: Country of citizenship.
10. **Gender:** Select one of the options: Male, Female, Other.

Billing (Step 2)

1. **Country**: Dropdown to select the billing country.
2. **Region**: Free-form region/state field.
3. **City**: Billing city.
4. **Address**: Street address.
5. **Postcode**: ZIP or postal code.

Affiliation (Step 3)

1. **Project**: Assign this client to a Project.
2. **Desk (Optional):** Restrict to one of the project’s Desks.
3. **Manager**: Select the internal user who “owns” this client.
4. **Company fee group**: Drop-down of predefined fee tiers.
5. **AffiliateID**: ID for tracking source or partner.
6. **CampaignID:** ID for tracking which marketing campaign brought the client.
7. **SourceID:** ID for tracking where the client came from.
8. **SubID:** Additional tracking ID for more detailed attribution.
9. **Verification level:** KYC level (e.g. Email, Video, In-person).
10. **Verification status**: Current status (Pending, Approved, Rejected).

Automatic Processed Status
If both **Desk** and **Manager** are assigned when creating the client, the system will automatically set:

processed = true

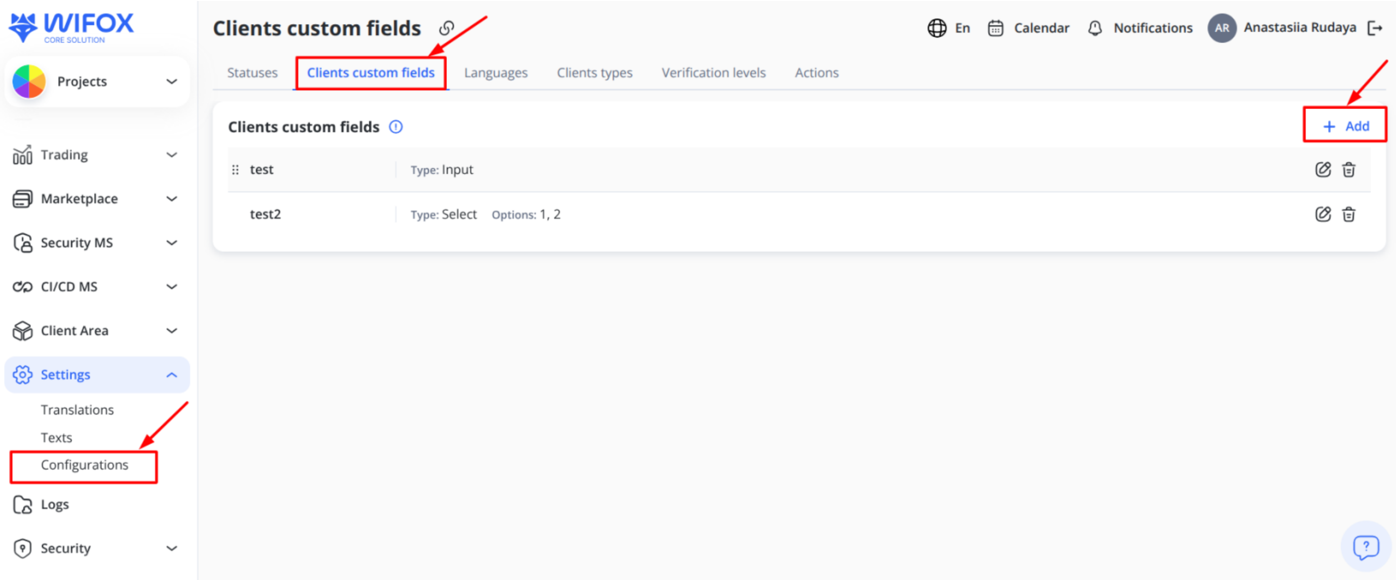
This behavior is enforced globally across the CRM.
You do not need to manually manage the processed flag.

If Desk or Manager are not assigned, the client will remain unprocessed until both are set.

Credentials (Step 4)
Email: Client’s login address (required).
Password:
□ Sparkle icon – auto-generate a secure password.

◫ Eye icon – toggle show/hide.

Custom Fields (Step 5)
To add custom fields, go to **Settings → Configurations → Client Custom Fields, then add the required fields.**



Two-Factor Authentication (2FA) (Step6)

Displays any preconfigured methods (Email, Google, Phone). You cannot add here, but you can review them.

> Get more information about authentication types in Wifox Business Core Solution [here]

Description (Step 7): Free-form notes about this client.

To enable asset creation for the client, select Create Asset at the top of the screen.

Save Your New Client (Step 8): When all required fields are filled in, click Save (top-right). You'll return to the Clients list, where your new personal client now appears.

> **Note:** You cannot change the type of the client and/or the client's email after saving their information.

You can view all clients in the **Clients** tab. To get full information about the client, click on the client's email in the **Email** column.

A drawer will open on the right with information about the client.

By following this detailed workflow, you'll ensure that every corporate or personal client is fully onboarded with accurate data, the correct project and desk affiliations, and the right team members assigned. Properly configured client records empower your desks to manage relationships, track compliance (KYC/AML), and deliver seamless service across your organization.

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