3. How to Create a Desk

Desks in Wifox Business Core Solution are the building blocks of your organizational structure within each Project. Think of a Desk as a department, office, or specialized workstream—such as “Sales,” “Support,” or “Analytics.” By creating multiple Desks, you can keep client data, employee assignments, and workflows neatly separated, ensuring that each team only sees and manages the records relevant to their function.

1. Open the Desks Module
In the left-hand navigation menu, click **Desks** (icon of interconnected nodes). The main grid displays every existing Desk, including its Name, parent Project, and quick-action icons.

2. Click “+ Add”
In the top-right corner of the Desks screen, click the **+ Add** button. The “Add desk” form will slide in, ready for your input.

3. Complete the General Section

Name
The human-readable title for the Desk (e.g., “Support Queue” or “NYC Sales Team”).
Importance: Appears throughout the UI wherever this Desk is referenced. Choose a clear, descriptive name.

Project
The parent Project under which this Desk belongs.
Action: Click the dropdown and select the appropriate Project. This links all Desk data (clients, actions, employees) to that Project’s scope.

Review the Members Panel
To the right of the General fields is the **Members** section, which initially shows **No members**. You cannot add employees until the Desk exists.

> You will also see the **Members** tab here, but you will only be able to add new members to the desk in the Edit mode.

Save Your New Desk
Once you’ve entered Name and Project, click the green **Save** button at the bottom-left. Your form will close, and the new Desk appears in the grid, ready for further configuration.

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