

3. How to Create a Project

Projects are the foundational containers in Wifox Business Core Solution (WBCS)—each one encapsulates its own Desks, Clients, Employees, and data. By creating a Project, you define an isolated workspace where your team can operate without risk of cross-project data exposure. Follow the steps below to set up a new Project correctly and have it ready for desks, clients, users, and workflows.

1. Open the Projects Module in the sidebar

In the left-hand sidebar, click “**Projects**” to show your current list of projects.

2. Start a New Project

Click the “**+ Add**” button in the top-right corner of the Projects screen. This opens the “**Add Project**” form.

3. Complete the General Section

General

This section defines the core identity and basic settings of the Project. All fields here apply system-wide and are required to uniquely identify the Project.

This section captures the core identity of your project. Fill in:

The screenshot shows the 'Add project' form. The 'General' section includes the following fields:

- Name: Enter
- Key: Enter
- Language: Select
- Region: Enter
- Category: Enter
- Website: Enter
- Project color: A row of color swatches (black, orange, yellow, green, blue, purple, pink, red, magenta).

The 'Custom fields' section includes a dropdown menu for selecting a node, with options for 'object {0}' and '(empty object)'.

Name

What it is: The human-readable name of the Project.

Usage: Displayed across the platform in lists, selectors, and headers.

Key

What it is: A unique internal identifier for the Project.

Usage: Used internally and in integrations.

Constraints: Must be unique.

Language

What it is: The default language of the Project.

Effect: Sets the primary UI language context for this Project.

Website

What it is: Optional Project-related website URL.

Purpose: Reference link associated with the Project.

Region

What it is: The geographical region linked to the Project.

Usage: Used to filter Projects by location (UK, Asia, North America, or any custom region defined by the client).

Category

What it is: The category assigned to the Project.

Usage: Used to filter Projects easily by purpose, product line, or any other business need defined by the client (e.g., Consulting service, Personal project, Brokerage, etc.)

Project color

What it is: A visual color identifier selected from predefined swatches.

Effect: Used across the UI to visually distinguish the Project.

4. Custom fields

Custom fields allow you to attach structured, schema-based metadata to a Project.

How it works:

Select a predefined schema node from the tree.

The selected object defines additional key-value data stored with the Project.

Custom fields are optional and depend on your system configuration.

Purpose:

Extend Project data without changing core fields.

Support custom integrations, reporting, or automation logic.

Avoid describing specific schemas or usage unless documented elsewhere.

5. Use as organization unit

This optional setting allows a Project to function as a legal or organizational entity.

Use as organization unit

* Organization address

* Organization ID

* Organization VAT

Email

Phone number

Organization logo

* Attach a file

Toggle behavior:

When **disabled**, organization-specific fields are hidden.

When **enabled**, the Project requires additional organization details.

Required fields (when enabled):

Organization address *

Organization ID *

Organization VAT *

Optional fields:

Email

Phone number

Organization logo

Organization logo

Upload a logo file associated with this organizational unit.

Supported formats: JPG, JPEG, PNG.

Use case: Enable this option when the Project represents a company, branch, or legal unit that requires identification details.

6. Save

Final step: After completing all required fields, click **Save** to create the Project.

You've successfully created a new Project in Wifox Business Core Solution. Next steps include: assigning Desks to define your organizational structure, adding Employees and Clients with appropriate Roles, and configuring workflows. With your Project in place, you can leverage WBCS's full feature set—structured, secure, and scalable—for optimal business management.

Revision #20

Created 3 September 2024 15:03:49

Updated 13 May 2026 07:49:06 by Anastasiia Rudaya