

# 4. How to Edit a Client

Once a client exists in Wifox, you can fine-tune their profile, track interactions, upload documents, and manage accounts—all from the Edit window. Follow these numbered steps to ensure nothing is overlooked.

After creating a client, the **Edit** window will open automatically.

In the **Edit** window, you can:

1. Edit the client's information entered during the creation stage (except Type and Project). This also includes reassigning clients to another desk or status.
2. Add or edit **Actions**: comments, notes, and other relevant information within the CRM.
3. Add or edit **Requests**: for instance, support tickets, call requests, etc.
4. Upload **Documents**: passport or ID, and bank card (front and back).
5. Check the client's **Transactions**.
6. Add or edit the client's **Accounts** and linked **Assets** (including currency and balance).

**Note:** Information about the client's Requests, Transactions, and Accounts is pulled automatically from the relevant modules.

## 1. Open the Client's Record

In the **Clients** list, locate the row for the client you want to edit.

### Locate your client:

Use the **Search...** box at the top of the Clients list to type any part of their **Email**, **Full name**, or **ID**. (Instant filtering, partial matches allowed.)

Or click **Filter** ► **Desk**, **Project**, or **Created date** to narrow by scope.

**Pro Tip:** Bookmark heavy-use filters (e.g. "All Personal clients in Acme Project") via the URL link icon next to the page title.

### Enter Edit mode:

Click the pencil icon in the **Actions** column for that row.

To create an Action without entering Edit mode, click the Add action icon located next to the pencil icon in the same Actions column.

The right-hand drawer slides out, pre-loaded on the **General** tab.

### Quick Create Action from Clients List

You can create an action directly from the Clients table without opening the client record.

In the Clients list:

Locate the client row.

In the Actions column, click the **Add action icon** (next to the Edit icon).

The Action creation drawer opens.

The selected client is automatically prefilled.

Complete the required fields and click Save or Save and create new.

This shortcut allows agents to log calls, notes, or comments without navigating into the client profile first.

### Location in the Row Actions

The Add action icon is displayed directly in the row's visible action buttons, immediately after the Edit (pencil) icon.

It is no longer located inside the **:** (More options) dropdown.

#### “ Permission note

The Add action icon is visible only to roles with permission to create Actions. Users without this permission will not see the icon.

## 2. Navigate the Tabs

At the top of the client's detail view you'll see these tabs:

1. **General:** Core profile fields you can edit
2. **Actions:** Log calls, notes & follow-ups
3. **Documents:** KYC uploads (IDs, bank cards, proof of funds)
4. **Requests:** Client-generated tickets and ad hoc data requests
5. **Transactions:** All ledger entries for this client (read-only)
6. **Accounts:** Create/manage asset or bank accounts linked to this client
7. **Agreements:** View signed contracts, NDAs, service agreements
8. **Logs:** Complete audit trail of every field change with user/timestamp details

**Pro Tip:** Press Ctrl + F inside the drawer to quickly find any field or label.

## General Tab

### 1. Balance (Read-Only Financial Summary)

If Core Banking is enabled in your environment, the client's **total balance** is displayed at the top of the client card.

#### Location:

Visible in the Client View drawer

Displayed in the header section of the Client View and Client Edit screens

**Field label:** Balance

**Type:** Numeric (float)

**Editable:** No (read-only)

The Balance represents the client's total aggregated amount across all linked assets.

Important:

1. The value is automatically retrieved from the Core Banking microservice.
2. The CRM does not calculate this amount locally within the client module.
3. If Core Banking is unavailable, the Balance field will not be displayed at all.
4. This field is informational only and cannot be modified manually.

**Use case:** Agents can instantly see the client's financial standing without switching to the Accounts or Assets tabs.

## 2. Personal

**Type:**

*Personal* clients have first/last names, DOB, risk fields.

*Business* clients use the 3-step wizard (company profile + UBO + members).

**Status:** *Default* or any custom statuses you've configured (e.g. "VIP", "High-Risk").

“ When creating a new Client status in **Settings → Configurations → Statuses**, make sure to define the **Order** field.

The Order value determines how statuses are displayed in dropdowns and lists. Statuses are sorted in ascending order based on this value.

If the Order field is not set, the status may appear in an unexpected position in the interface.

**Name & Contact:**

**First name, Last name:** Displayed on statements, emails, and internal lists.

**Phone number** (required) & **Additional phone number** (optional): Used for SMS alerts or 2FA.

**Date of Birth:**

Opens a date picker; used for age verification.

*Example:* You might block accounts under age 18.

**External ID:** Your own CRM or partner reference number (e.g. "Zendesk User #1234").

**Passport:** Enter passport number if you collect it for KYC.

**Nationality:** Impacts tax or compliance rules.

**Risk level:** Your internal scale (e.g. Low, Medium, High)—drives transaction limits.

**AML Screening:** Free-form field to paste screening summary or pass/fail status.

**Warning:** Changing Type from *Business*→*Personal* is not allowed after initial creation.

### 3. Billing:

**Country:** Dropdown list of ISO country codes.

**Region:** State/province field (free text).

**City, Address, Postcode:** Standard postal fields.

**Use case:** Some payment rails require exact match between billing address and card on file.

### 4. Affiliation

Controls where the client “lives” in your operational hierarchy:

1. **Project:** Required for scoping data and routing workflows.
2. **Desk:** Optional sub-group within a Project (e.g. “LOAN desk” vs “ONBOARDING desk”).
3. **Manager:** The internal employee accountable for this client.
4. **Company fee group:** Assigns tiered pricing or service-level agreements.
5. **AffiliateID:** Partner or campaign code for revenue sharing.
6. **Sub ID:** Optional secondary tracking or sub-campaign identifier.
7. **Verification level:** KYC method requested (Email, Video, In-person).
8. **Verification status:** *Init, Pending, Approved, Rejected*.

“ **Example:** Jane Doe is in Project = “Acme USA,” Desk = “Sales,” Manager = “Bob.”

### Automatic Processed Status Update

The system automatically manages the internal `processed` flag based on assignment logic.

If both **Desk** and **Manager** are assigned to a client during editing, and the client was previously unprocessed, the system will automatically set: `processed = true`

This behavior applies globally across the CRM and is not limited to affiliate hub processing.

“ **Important:**

1. The system only promotes `processed` from false → true.
2. It does not automatically revert `processed` back to false if Desk or Manager are later removed.
3. No manual action is required from the user.

This ensures consistent client lifecycle behavior across all CRM entry points (manual edit, bulk edit, import, API, etc.).


## 5. Credentials

**Email:** Login ID (read-only here).

**Password:** Must meet complexity: ≥8 chars, uppercase, lowercase, digit, special char.

**Sparkle** auto-generates a random secure password.

**Eye** toggles show/hide.

**Tip:** Rotate client passwords quarterly by clicking  and emailing the new credentials.

## 6. Additional

A JSON-style tree picker for arbitrarily structured metadata:

Click the **+** to append a new key/value.

Rearrange, filter, or delete entries.

## Multi-Select Display Behavior

For multi-select custom fields:

1. Selected values are displayed as individual chips inside the field.
2. If the number of selected values exceeds the available field width, the interface collapses the overflow into a **“+N more”** indicator.
3. Clicking the field expands the dropdown, where all selected values are visible and can be removed.

This keeps the interface compact while preserving full visibility when editing.

### “ Use cases:

Store third-party IDs (e.g. “StripeCustomerID”:“cus\_ABC123”).

Attach ad-hoc flags (e.g. “VIP: true”).

## 7. Two-Factor Authentication (2FA)

Displays any methods already set up (Email, SMS, TOTP).

Hover on a non-default method to reveal **Make default** or **Delete**.

**Note:** You cannot add 2FA methods here—clients configure those on first login.

**8. Description:** Supports long-form text (up to 2000 characters). Good for case notes or behavioral observations.

### 9. State & Create asset & Save

**State** dropdown (top-right) toggles among **Active**, **Deactivated**, **Suspended**.

*Deactivated* preserves the record but blocks login/assignment.

*Suspended* can be used for temporary holds pending review.

#### “ Create asset

Located in the top-right header of the General tab, immediately to the right of the State dropdown. When checked, this option auto-provisions a new asset ledger entry for the client as soon as you hit Save.

If changes are not saved, check field validation limits (e.g. text length) and required fields.

## Actions Tab

Log every meaningful interaction:

Click **+ Add** (upper right in the Actions block header).

## Fast “Create Action” from Client Card

Managers can quickly create an Action directly from the client card without leaving their workflow.

### Location

Inside the Client card:

```
/clients/view/{clientId}/client
```

In the **Actions** block header (above the table), a **+ Add** button is available.

### Permissions

The **+ Add** button is visible only to roles that have permission to create Actions.

If the role does not have create permission, the button is not displayed.

### Behavior

Clicking **+ Add**:

Opens the Action creation interface (drawer or modal, depending on system configuration)

The current client is **automatically prefilled**

The client field is **locked and cannot be changed**

## On Save

The action is created

The modal/drawer closes

The **Actions table refreshes automatically**

The new record appears without a full page reload

## On Cancel:

The modal/drawer closes

No changes are saved

This allows managers to log calls, notes, or reminders instantly while reviewing the client profile.

## Type:

1. **Note:** Internal memos ( "Called compliance - waiting docs." )
2. **Call:** Schedule a follow-up call—requires an **Action date**.
3. **Comment:** Public-facing remarks (e.g. "Client agreed to terms").
4. **Manager** dropdown: Who's responsible for follow-up.
5. **Text** box: Detail your note/call/comment.
6. **Save** or **Save and create new**.

## Action Type: "Completed by Default" Behavior

Some Action Types can be configured to be automatically marked as completed upon creation. For example, a **Comment** may be logically completed immediately and does not require further follow-up.

### Configuration

This behavior is controlled at the Action Type level.

Location: **Settings** → **Actions**

`/settings/actions`

Each Action Type includes a checkbox:

### Completed by default

If enabled:

All new actions of this type will be marked as **Completed** automatically when created.

The Completed checkbox will appear pre-selected in the Action creation form.

The user may manually uncheck it before saving.

If disabled: The Completed field behaves according to the standard default (unchecked).

### How It Works

When creating a new Action:

1. The system reads the selected Action Type.

2. If `Completed by default` is enabled for that type: The **Completed** checkbox is automatically checked.
3. If the Action Type is changed during creation: The Completed state updates dynamically based on the new type.

This behavior applies consistently across all Action creation entry points:

1. Client card → Actions tab
2. Clients list → Create Action icon
3. `/actions/add`
4. Global calendar
5. Employee calendar

### “ Important Notes

- The default state is derived from the Action Type configuration, not hardcoded in the UI.
- Users can override the Completed checkbox manually before saving.
- Existing Action Types default to **not completed by default** unless configured otherwise.

## Save and create new

In addition to the standard **Save** button, the Action drawer includes a **Save and create new** option.

Button behavior:

### **Save:**

Saves the action

Closes the drawer (default behavior)

### **Save and create new:**

Saves the action

Keeps the drawer open

Resets the form for creating a new action

Preserves the selected Client and Manager

Clears Type, Subtype (if applicable), and Text fields

Resets validation state

This feature allows agents to quickly create multiple consecutive actions without reopening the drawer.

**Example use case:** An agent logs several follow-up calls or notes in sequence for the same client.

## Actions Table Structure and Metadata

The Actions table inside the Client view drawer displays extended lifecycle and audit metadata for each action.

### Column Structure

The table contains the following columns in this exact order:

1. **Date**
2. **Type**
3. **Subtype**
4. **Message**
5. **Comment on closing**
6. **Created at**
7. **Updated at**
8. **Creator**
9. **Responsible**

The column order is fixed and must not be rearranged.

If older layouts displayed a different sequence, the table has been updated to follow this standardized structure.

### Sorting

Sorting is available for the following columns:

1. **Date**
2. **Created at**
3. **Updated at**

Sorting behavior:

Clicking the column header toggles between ascending and descending order.

Sorting behavior matches other CRM tables.

Sorting does not interfere with pagination.

Sorting does not affect action creation or editing.

### Horizontal Scrolling

Because of the increased number of columns, horizontal scrolling is enabled for the Actions table.

Behavior:

The table scrolls horizontally within its container.

The Client drawer layout does not overflow or break.

All columns remain accessible regardless of screen width.

The exact scrollbar behavior (always visible vs overflow-based) follows the approved UI design pattern.

## Filtering by Message and Comment on Closing

The Actions module supports advanced text-based filtering by both the main action message and the closing resolution comment.

This allows managers to quickly locate specific interactions using keywords or phrases.

### Available Text Filters

Two independent text filters are available inside the Filters panel:

#### Description (Message)

Filters actions by the main action text content.

Operator: Contains

#### Comment on closing (Resolution)

Filters actions by the closing comment entered when marking the action as completed.

Operator: Contains

Both filters:

1. Support partial text matching
2. Are case-insensitive
3. Can be combined with other filters (Project, Creator, Responsible, Dates, etc.)
4. Work together or independently

### How to Use

1. Open the Actions module.
2. Click Filters.
3. Enter text into:
  - Description field (for action body)
  - Comment on closing field (for resolution text)
4. Click Apply.

The system returns all matching actions.

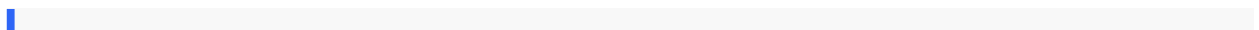
### Filter Chips Display

When applied, text filters appear as chips above the table, for example:

Project | Default

Comment on closing contains | client confirmed

These chips can be individually removed without resetting other filters.



## Important Notes

1. **Created at** and **Updated at** are system-generated timestamps.
2. These fields cannot be manually edited.
3. Editing an action automatically updates the **Updated at** value.
4. The **Creator** field shows the user who created the action.
5. The **Responsible** field reflects the assigned manager for follow-up.
6. Pagination continues to function normally for clients with many actions.

## Editing Action Type and Subtype

Users with **Edit Action permissions** (or the action creator) can modify the action's Type and Subtype if needed.

This is useful in cases where an incorrect subtype was initially selected (for example, choosing the wrong call category).

To change it:

1. Open the action from the Actions tab.
2. Click Edit.
3. Select a different Type or Subtype from the dropdown.
4. Click Save.

All changes are recorded in the Logs tab for audit purposes.

## Documents Tab

Upload or replace verification documents by dragging or browsing to add images for:

1. **Bank card (front)** (Step #1) & **(back)** (Step #2): Required for payments.
2. **Passport or ID** (Step #3): Government-issued photo ID.
3. **Source of funds** (Step #4): e.g. Pay slip PDF, bank statement.
4. Drag-and-drop or click to browse; valid formats  ,  , .

**Auto-save** on upload; look for the thumbnail preview to confirm success.

## Requests Tab

1. Click **+Add** in the top-right.

2. Fill in:

**Name:** Short title ().

**Time range:** When you need it completed.

**Type:** e.g. *Document Request, Support Ticket*.

**Description:** Full instructions or context.

**Additional information:** Use the JSON tree for structured data.

**Attach files:** PDFs, screenshots.

**Save .**

**Note:** New requests will appear in this list with status and creation date.

## Conversations: Image Upload (Paste & Drag-and-Drop)

The Requests → Messages conversation supports direct image attachments via clipboard paste and drag-and-drop.

This functionality is available in:

CRM → Client → Requests → Messages

Trading Area → Support → Tickets chat

### Paste Image from Clipboard (Ctrl + V)

Users can paste an image directly into the message composer.

When pressing **Ctrl + V**:

1. The system detects image data in the clipboard.
2. The image is converted into a temporary file.
3. A preview appears inside the composer before sending.

### Composer Preview

The preview includes:

1. Thumbnail image
2. Remove (×) button
3. Upload progress indicator (spinner or progress bar)

The user may remove the image before sending.

### Drag & Drop Image

Users can drag an image file into the conversation area.

### Drag Behavior

1. When dragging over the chat container, a drop overlay appears.
2. Only image files are accepted.
3. On drop, the image is attached to the composer with preview.
4. Overlay disappears after drop or drag leave.

The overlay does not permanently block scrolling and is only visible during active drag.

## **Sending Behavior**

The system supports:

1. Image only
2. Text only (existing behavior)
3. Text + image in the same message

After sending:

1. The message bubble displays the image as a thumbnail.
2. Clicking the thumbnail opens a full-size preview modal.
3. The message appears immediately in the conversation history.

## **Validation Rules**

Allowed formats:

1. image/png
2. image/jpeg
3. image/webp (if enabled)

Rejected:

1. Non-image files
2. Unsupported MIME types
3. Files exceeding the maximum allowed size (configured, e.g., 5-10MB)

If validation fails:

1. A user-friendly error message is shown.
2. The image is not attached.
3. The user may try again.

## **Upload Handling**

Upload follows the same storage logic used for existing attachments.

Process:

1. File uploads to storage service.
2. System receives file URL / identifier.
3. Message entity stores attachment data.

Both CRM Requests and Trading Tickets use the same attachment model and rendering logic.

## **Security & Safety**

1. Images are rendered safely (no inline HTML injection).
2. Only validated MIME types are accepted.
3. Images open in secure modal using controlled storage URLs.
4. External storage must be domain-controlled.

## Transactions Tab

Read-only ledger of every monetary event for this client: Deposits, withdrawals, fees, adjustments.

Columns include **Date, Type, Amount, Currency, Balance**.

“ **Pro Tip:** Filter by date or type to investigate anomalies.

## Accounts Tab

1. Click **+ Add** in the top-right.

Provision new asset wallets or bank links:

**Type:** e.g. *fiat, crypto, e-wallet*.

**External ID:** Bank account number or integration reference.

**Platform:** Which service (e.g. *Stripe, Utip, Binance*).

**Save.**

“ Each account row shows **Status** (Active/Inactive), **UID, Owner, Created**.

## Assets Tab

The **Assets** tab displays all asset entries (wallets, balances, or positions) associated with a specific client.

This tab is available to users whose role has the **Assets → View** permission enabled in the **Roles** module.

Use this tab to review, track, or verify every asset currently held by the client.

Each entry includes key information such as:

1. **Asset type** (e.g. fiat, crypto, tokenized balance)
2. **Currency** and **amount**
3. **Linked account ID**
4. **Status** (Active / Inactive)
5. **Date created** and **last update**

To enable the tab for a user role:

1. Go to **Roles** → **Edit Role**.
2. Expand the **Clients** section.
3. Check the box **Assets** → **View** (and **Edit** if required).
4. Save changes.

Once enabled, the *Assets* tab becomes visible in the client's Edit view.

At the top-right of the **General** tab, next to the **State** dropdown, you'll see a checkbox **Create asset**.

When checked, this option **automatically creates a default asset record** for the client upon saving, if none exists yet.

This ensures every new client has at least one corresponding asset entry linked to their profile.

Authorized users can:

- View detailed balances and currency allocations
- Adjust statuses or link assets to new accounts (if "Edit" permission is enabled)
- Export asset data for reconciliation or reporting

## Orders Tab

The Orders tab displays all trading orders associated with the selected client.

It supports:

1. Filtering (All / Open / Closed)
2. Column customization
3. Sorting
4. Inline editing (if permitted)
5. Real-time PnL updates
6. Order closing

### Order Entry Price Editing and PnL Recalculation

When editing an existing order's **Entry Price**, the system immediately recalculates:

1. Displayed PnL
2. Used margin (if applicable)
3. Settlement value on close

The updated entry price becomes the new authoritative reference for all future calculations.

### Close Order Settlement Logic

When closing an edited order:

The system calculates settlement using:

1. Updated entry price
2. Actual close price at close time
3. Volume

4. Contract size
5. Direction

Settlement formula:  **$FinalPnL = (ClosePrice - UpdatedEntryPrice) \times ContractSize \times Volume$**

For Sell:  **$FinalPnL = (UpdatedEntryPrice - ClosePrice) \times ContractSize \times Volume$**

Wallet credit/debit must equal:  **$FinalPnL - Commission - Swap$**

The credited amount must match the PnL shown in the UI at close moment.

## Agreements Tab

Lists PDF or link to signed service agreements, NDAs, or other legal documents.

**Read-only**; to upload or modify agreements, use the **Agreements** module in the sidebar.

## Logs Tab

The ultimate audit resource:

Every field change is logged with **User, Timestamp, Old value, New value.**

**Search** within logs by keyword or date.

“ **Use case:** Prove who deactivated a client or changed their fee group for compliance audits.

## Final Save & Exit

Wherever you make edits, look for a **Save** button and confirm it turns green.

Closing the drawer (× in top-left) will prompt you if you have unsaved changes.

After a major batch update, run a filter to verify that all expected changes appear in the list view.

By following this comprehensive guide, you'll ensure every client record is complete, traceable, and compliant with your organization's policies—and you'll maximize the power of Wifox's modular CRM to keep your data accurate and your teams aligned.

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