# 4. How to Edit a Desk

In Wifox Business Core Solution (WBCS), **Desks** are the logical work-areas—departments, offices, or channels—within each Project. After you create a Desk, you can fine-tune its settings, manage which Employees belong there, or delete it when it's no longer needed. Follow the detailed instructions below.

After creating a desk, the editing window will open automatically.

In the Edit window, you can:

1. Change the name of the desk.
2. Add or delete members of the desk.

**Why You Might Edit a Desk**

**Reflect a team change:** Your "Support Queue" Desk might become "Customer Success" after your support model evolves.
**Reassign personnel:** When an employee moves from Sales to Retention, you remove him/her from the Sales Desk and add to Retention.
**Audit access:** Periodic reviews ensure only active, authorized staff remain on critical teams.

**Before You Begin**

Only Desks you've manually added can be deleted; every Project retains its one Default Desk.
To add someone here, they must already exist in the parent Project (see **Projects → Employees**).

**Step 1. Open the Desks Module**
In your left-hand menu, click **Desks**.
You will see a card for each Desk, organized by Project.

**Step 2. Enter Edit Mode**
Hover your mouse over the Desk you need to change.
A small pencil icon appears in its top-right corner—click it to open the edit panel.

***Tip**:* If you don't see the icon, ensure you have the "manage own" or higher permissions on that Desk.

**Step 3. Rename the Desk**
In the edit form's **General** section, locate the **Name** field.
Replace the existing text with your new Desk name.
*Example:* Change "Support Queue" → "Customer Success."

This new label will appear everywhere—lists, dropdowns, reports.

**Step 4. Verify the Project**
Directly beneath the Name, the **Project** dropdown shows where this Desk lives.
This value is read-only: you cannot move a Desk to another Project.
*If you need a Desk in a different Project:* create a new Desk there instead.

> **Note:** The list consists of members who are included in the connected project. To add a new user to this list, go to the Projects tab and add the member to the relevant project.

**Step 5. Filter Existing Members**
On the right, the **Members** panel lists current Desk members.
Use the **Search** box at its top to type any employee’s name or email.
The list instantly narrows to matching entries—ideal for large teams.

**Step 6. Add New Members**
Click the **+ Add member** button in the Members panel.
A slide-out appears showing every Employee in the parent Project.
*Example:* If you’re editing the “Retention” Desk in “Acme USA,” you’ll see all “Acme USA” staff.

**Step 7. Grant Access**
In that slide-out, click the  icon next to any Employee to add them.
They immediately appear in the Members list and gain access.
*Practical note:* New members can now see all Clients, Requests, and Actions tied to this Desk.

**Desk Membership & Data Visibility**
Desk membership directly impacts data visibility across the system, including Clients, Requests, and Transactions.
Access to transactions is governed by role permissions combined with Desk assignment:

1. Users with **View own desks** permission can only see transactions related to Desks they are assigned to.
2. Users with **View all desks** permission can see transactions across all Desks.
3. If a user is removed from a Desk, they immediately lose access to data associated with that Desk (subject to their role permissions).

Transaction visibility is enforced at backend level and follows the same authorization logic used across Clients and Projects modules.

**Step 8. Save Your Changes**
After renaming and member adjustments, click **Save** at the bottom-left.
All edits apply instantly: teammates can refresh and see the new Desk name or membership.
*Confirmation:* You’ll see a brief “Changes saved” banner.

**Step 9 Quickly View Members (without Editing)**

Back on the main Desks grid, hover any Desk card.

Click the **Show members** icon to get a read-only peek at its roster.

Use this to audit who’s on each team without risking accidental changes.

**Step 10. Remove an Existing Member**

In the Members panel, find the Employee you want to remove.

Click the trash icon beside their name.

They lose access to this Desk—useful when someone leaves the team.

Following these detailed steps and considerations ensures that your WBCS environment stays organized, secure, and aligned with your company’s evolving team structures.

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