5. How to Edit an Action

Updating an existing Action lets you correct typos, reassign responsibility, or add missing details. These steps guide you from locating the record through saving your changes.

1. Open the Actions Module:
Click **Actions** in the left-hand menu.
The main Actions table will appear.

2. Locate the Action You Want to Edit:
Search by client name, UID, or text in the **Search…** box.
Or use **Filter** (funnel icon) to narrow by Type, Creator, Responsible, dates, etc.

3. Click the Edit Icon: In the row for your Action, hover at the far right under **Actions** and click the ✎ pencil icon.

Optional: Open Edit Action in a New Browser Tab
To work with multiple Actions in parallel or avoid losing your place in the list, you can open the Edit action panel in a separate browser tab.
Hold **Cmd (macOS)** or **Ctrl (Windows/Linux)** and click the ✎ Edit icon.
The Action edit panel will open in a new tab, allowing faster navigation between Actions.

4. Review & Modify Fields in the Edit action Panel
A side panel titled **Edit action** slides in. Fields you can update include:

Field	Can You Edit?	Notes
Client	No	Read-only—actions stay tied to their original client.
Type	No	Fixed once created (Note, Call, Comment).
Subtype	Yes	If your Type supports Subtypes, pick one here.
Text	Yes	Update the content of your note/comment/call log.
Responsible	Yes	Change who’s assigned to follow up on this Action.
Action date	Yes	Correct the date/time this interaction occurred.

Tip: The **Created at** timestamp is read-only and shows when the action was first logged.

5. Required Comment on Closing an Action
When marking an Action as **Completed**, providing a closing comment may be mandatory depending on system configuration.

If the **Completed** checkbox is enabled and the system requires a closing comment:

1. The **Comment on closing** field becomes required.
2. The field is highlighted in red if left empty.
3. The system will block saving until a comment is entered.

This ensures accountability and proper documentation of why the action was closed.

How It Works

1. In the Edit action panel, check the **Completed** box.
2. The **Comment on closing** field appears (or becomes active).
3. Enter a summary of the result, outcome, or resolution.
4. Click **Save**.

If the field is empty and required:

1. A validation message appears.
2. The Action cannot be saved.

Why This Is Important
Requiring a closing comment helps:

1. Maintain audit transparency
2. Document client interaction outcomes
3. Ensure proper handover between managers
4. Prevent silent closure of tasks

This creates a reliable activity history within the CRM.

6. Save Your Changes:
Click **Save** at the bottom of the panel.
The panel closes, and the table reloads with your edits.
Check the **Updated at** column to confirm your changes were recorded.

7. Confirm & Audit:
You can re-open the Edit panel at any time to verify.
All edits are tracked in **Updated at** for auditing.

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