

WBCS - Core Solution

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Core Solution Release 1.15.0

Release Summary Report

Release Version: 1.15.0

Previous Version: 1.14.0

Release Date: January 16, 2026

Executive Summary

Release **1.15.0** delivers a broad set of improvements across the platform, focusing on **usability, reporting, customization, performance, and stability**.

This release introduces new UI capabilities, expanded reporting and export options, improved translations and localization, enhanced AI features, and multiple backend optimizations.

In addition, a large number of fixes improve reliability across core business flows.

What's New

☐☐☐ Client Management

- Client action history on client card A complete, chronological history of all client-related actions is now available directly on the client card, improving transparency and context for managers.
- Extended client entity model New fields were added to the client entity to support richer data modeling, better segmentation, and future analytics capabilities.
- Next / Previous client navigation Seamless navigation between client cards without returning to the client list, significantly accelerating day-to-day CRM workflows. *
- Future action date column Displays the nearest planned action for each client, helping managers prioritize follow-ups and workload.
- Last action date column Shows the most recent completed action per client, enabling quick assessment of engagement activity.
- Removed description field limits Client description fields now support extended text for detailed notes, call summaries, and internal documentation.

☐☐ Actions & Requests

- Open Actions in a new tab Actions can be opened in a separate browser tab, enabling parallel work with multiple clients or tasks.
- Actions UX enhancements Improved usability, clarity, and interaction patterns across the Actions section for smoother daily operations.

- Comments after Action: Multiple actions creation in a single flow, reducing repetitive manual actions.

☐ Filters & Configuration

- Transaction filters by desk and manager Added advanced filtering options in Transactions to improve segmentation, control, and reporting accuracy.
- Improved “Action Date / Session Date” filtering Refined date filtering logic to eliminate incorrect results and edge-case inconsistencies.
- Configurable column order CRM configurations now allow dynamic reordering of table columns, giving teams more control over data presentation.

☐ UX / UI Improvements

- Universal modal closing behavior All CRM modals can now be closed regardless of nesting depth or opening context, improving UX consistency and predictability.
 - Bucket name visibility fix Bucket titles are now always visible inside buckets, resolving previous usability issues.
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Key Highlights

☐ New Features & Capabilities

User Interface & Usability

- Drag & drop support for managing verification statuses
- New table columns and filters (e.g. *Is Active*, *Is Completed*)
- Improved navigation and interaction flows in Actions and Reports
- Popovers and drawers added for better contextual information
- Calendar events now open detailed views on click

Reporting & Data Management

- Export functionality added to reports
- Invoices module implemented, including invoice list and details
- Description field added to invoices (UI & backend)
- Improved data formatting (currency display, dates, accordions behavior)
- Duplicate handling enhanced with date-based filtering

Customization & Branding

- Project-level customization support (logos & favicon)
- Improved configuration for symbols and labels

AI & Automation

- AI Voice Agent improvements for better accuracy and stability

- Embeddings synchronization mode introduced (Manager / Client architecture)
 - Chat Helper storage migrated from file system to MongoDB for scalability
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📦 Bug Fixes & Stability Improvements

Core Platform Fixes

- Resolved notification delivery issues
- Fixed permission checks for downloading reports
- Corrected transaction handling and error processing logic
- Improved handling of empty or edge-case data in charts and reports

UI & Data Consistency

- Fixed incorrect labels, ordering, and formatting issues
- Corrected filtering, sorting, and resolution column behavior
- Addressed multiple layout and design inconsistencies

Release 1.21.0

1. ☑ CRM & Trading Platform Enhancements

WIFOX-681 - Fast Filters in Orders Module

Fast Filters are now available in the Orders module, matching the experience in other CRM modules.

Business impact:

- Teams can quickly segment and find orders, improving efficiency and decision-making.

WIFOX-743 - Orders Table Footer with Aggregated Metrics and Pagination

The Orders table now features a footer with total order count plus improved pagination controls.

Business impact:

- Managers and teams get instant insights into trading activity and can navigate large datasets more easily.

WIFOX-742 - Improved Create/Edit/Clone Order Modal

Order modals have been reworked for clarity and consistency, with all field logic reviewed and updated.

Business impact:

- Reduces errors and speeds up order management, making trading operations smoother.

WIFOX-614 - Highlight New Orders in Table

Orders opened or updated within the last 15 minutes are now highlighted for quick identification.

Business impact:

- Teams can instantly spot recent activity, improving responsiveness and oversight.

WIFOX-599 - Always Visible Creation Date in Requests & Tickets

The creation date for CRM requests and trading tickets is now always visible, regardless of scroll position.

Business impact:

- Improves SLA tracking, prioritization, and compliance.

WIFOX-595 - Dropdown Lists Respect Dark Mode

Dropdown lists in CRM now properly adapt to dark mode.

Business impact:

- Enhances user comfort and visual consistency for those working in dark mode.

WIFOX-555 - Long Table Values Now Show Ellipsis

Long values in CRM tables are now truncated with ellipsis for better readability.

Business impact:

- Prevents layout issues and keeps tables clean and easy to scan.

WIFOX-636 - Wider Status Column in Tables

The status column in tables has been widened for better visibility.

Business impact:

- Makes it easier to read and interpret status information at a glance.

WIFOX-617 - Tags Moved Next to Table

Tags have been relocated next to tables, removing the full section for a cleaner layout.

Business impact:

- Streamlines the interface and saves screen space.
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2. Trading Logic, Data & Backend Improvements

WIFOX-779 - Real-Time Orders via Sockets

Order data in the terminal and CRM is now delivered via sockets for real-time updates.

Business impact:

- Users see the latest order information instantly, reducing delays and improving responsiveness.

WIFOX-776 - Bootstrap Sync for Clients and Projects

On core startup, all clients and projects are now synchronized to RabbitMQ, ensuring data consistency across services.

Business impact:

- Reduces risk of data mismatches and ensures all services have up-to-date information.

WIFOX-767 - Bulk Update for Lot Size and Min Volume in Symbol Groups

Managers can now update lot size and minimum volume for multiple symbols at once.

Business impact:

- Saves time and reduces manual errors when managing trading instruments.

WIFOX-705 - Symbol Configuration Change Logging

All changes to symbol configurations are now logged, including who made the change and what was changed.

Business impact:

- Improves auditability, risk control, and regulatory readiness.

WIFOX-704 - Standardized Symbol Configuration with Versioned CSV Import

Symbol definitions are now standardized and managed via a version-controlled CSV import process.

Business impact:

- Ensures consistency and traceability for all trading symbols, reducing operational risk.

WIFOX-740 - Client Status Column in Actions Module

A new Client Status column has been added to the Actions table, with editing, filtering, and customization options.

Business impact:

- Managers can quickly assess and update client status directly from the actions list.

WIFOX-738 - Update lastActionDate Logic to Use Action Created Timestamp

Client lastActionDate now reflects the most recently created action, not just completed ones.

Business impact:

- Provides a more accurate view of client engagement and activity.

WIFOX-639 - Balance Updates After Transactions

Balances now update immediately after transactions are made.

Business impact:

- Users and admins always see up-to-date financial information, reducing confusion and support requests.

3. Trading Groups & Risk Management

WIFOX-717 - New Trading Groups Model: Default + Priority Overrides

A simplified trading groups model now supports a default group and priority overrides for specific symbols.

Business impact:

- Makes trading group management clearer and more flexible for both users and managers.

WIFOX-714 - Locked Default Trading Groups with Leverage Field

System now includes locked default trading groups with leverage, swaps, and commission fields.

Business impact:

- Ensures consistent trading conditions and simplifies compliance.
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4. ☐☐ Communication & File Handling

WIFOX-652 - Unified File Format Support in Requests and Tickets

Acceptable file formats for uploads are now unified across CRM and Tradersroom.

Business impact:

- Reduces confusion and support issues when sharing files between teams and clients.

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☐ CRM & User Experience Overhaul

This theme focuses on making the platform faster and more intuitive by removing navigation friction and optimizing data display.

WIFOX-1039 - Comprehensive Performance Audit

Completed a deep-dive audit identifying CPU and RAM bottlenecks, leading to fixes in React style reconciliation and Ant Design cache management.

Business impact:

Significantly reduces platform "freezes" and ensures long-term stability as your data volume grows.

WIFOX-1149 - Optimized Sidebar Transitions & State

To solve interface lag and flickering, we optimized sidebar transitions and state management for a snappier feel.

Business impact:

Provides a smoother, more professional user experience and reduces frustration during high-speed navigation.

WIFOX-1040 - Persistent Fast Filters Across Sessions

Fast filters now remain selected and persist even after page reloads or navigation between different modules.

Business impact:

Saves time for teams who frequently switch between views, maintaining their specific data segments.

WIFOX-1048 - Unified Table Footer with Total Counts

All CRM tables have been updated with a standardized footer that includes total record counts and rows-per-page selectors.

Business impact:

Provides managers with instant insights into dataset sizes and a consistent navigation experience across all modules.

WIFOX-1047 - Native Scrolling for Large Data Lists

By replacing complex virtual scrolling with native browser behavior, we've ensured large lists load and scroll reliably without rendering glitches.

Business impact:

Ensures data integrity and visual stability when teams are reviewing long lists of clients or orders.

WIFOX-1123 - Redesigned Call Modal

Modernized the UI for the call management modal to align with the new CRM design language.

Business impact:

Reduces cognitive load for agents during active communication with clients.

WIFOX-1060 - Searchable Manager Selection

Added a searchable interface to the "Manager" field within the client creation and edit forms.

Business impact:

Speeds up the assignment process in organizations with large management teams.

WIFOX-1127 - Enhanced Client Phone Display

Added a one-click copy icon and improved formatting for client phone numbers when telephony integrations are inactive.

Business impact:

Streamlines manual outreach and improves the efficiency of sales and support teams.

WIFOX-1122 - Internal Scroll for Select Components

Implemented native scrolling within dropdown select components to handle long lists of options.

Business impact:

Improves usability in configuration forms where users must choose from large sets of data.

Trading Operations & Client Management

These updates target the core of your daily operations—managing accounts, leads, and financial data with higher precision.

WIFOX-1049 - Operational Date Presets in Global Picker

We added dynamic date ranges like "Last 24 hours," "This Week," and "Last Month" to the date picker.

Business impact:

Significantly speeds up performance reporting and daily audit tasks for management teams.

WIFOX-1074 - Duplicate Protection in Client Imports

A new "Skip Existing" mode for client imports prevents accidental duplicates or unwanted updates to existing lead data.

Business impact:

Protects the integrity of your lead database and prevents confusion among sales teams.

WIFOX-1125 - Accurate Profit Display in Account Currency

We resolved a logic issue to ensure profits are correctly displayed in the account's base currency rather than a default system currency.

Business impact:

Ensures absolute financial clarity and builds trust with clients by showing accurate P&L data.

WIFOX-1050 - Task Ownership & Responsible Manager Column

The Actions table now includes a "Responsible" column and a multi-select filter to track task ownership.

Business impact:

Improves accountability and allows team leads to quickly assess workload distribution.

WIFOX-1106 - High-Volume Asset Support (1000+ Symbols)

The system now reliably loads and manages order data even when the platform is configured with over 1,000 different trading instruments.

Business impact:

Supports business scaling and allows for a more diverse range of trading offerings without performance loss.

☐ Security, Reliability & Backend

Behind-the-scenes improvements to ensure data integrity and secure communication with your clients.

WIFOX-293 - Full Suite of Automated System Emails

We have finalized the complete set of system email templates for all key registration and transaction events.

Business impact:

Ensures professional, branded communication is delivered to clients automatically at every touchpoint.

WIFOX-809 - Refined Audit Logging for Manager Actions

The logging service now accurately captures specific manager and client interactions while filtering out background system noise.

Business impact:

Provides a cleaner, more actionable audit trail for compliance and risk management.

WIFOX-1002 - Standardized Security & Login Error Handling

Login error messages and security protocols have been unified across the platform for a more consistent entry experience.

Business impact:

Enhances platform security while providing clearer guidance to authorized users during login.

WIFOX-1079 - Simplified Symbol Configuration

We have streamlined the symbol configuration model by removing unused fields like "timezone" and "marginRequirement."

Business impact:

Simplifies the administrative setup of new trading instruments and reduces the risk of configuration errors.

WIFOX-1146 - High-Capacity Lead Status Lookups

Removed an arbitrary 100-item limit for bulk lead lookups and documented the new pagination support in the public API.

Business impact:

Allows affiliates and external partners to sync larger datasets more efficiently.

WIFOX-1079 - Simplified Symbol Configuration Model

Streamlined the trading engine by removing obsolete properties like "timezone" and "marginRequirement" from symbol definitions.

Business impact:

Simplifies instrument setup and reduces the technical complexity of the trading backend.

WIFOX-1135 - Secure Bucket Deletion

Implemented a safeguard that prevents the accidental deletion of data "buckets" that still contain active sources.

Business impact:

Prevents accidental data loss and ensures a more structured administrative workflow.

Release 1.26.0

☐ CRM & User Interface Enhancements

Improving the speed, layout, and daily usability of the management interface.

- **WIFOX-1041 - High-Performance Sidebar Navigation**

The sidebar interaction model was redesigned to be open by default and manually collapsible, removing performance-heavy hover animations.

Business impact:

Eliminates interface "flicker" and lag during navigation, allowing managers to move between modules faster and with less system strain.

- **WIFOX-605 - Centralized Desk Management Table**

The Desks view was converted from a card layout to a searchable, high-density table view, mirroring the Buckets module.

Business impact:

Provides a clear, scalable overview for organizations with many desks, making it easier to find specific teams and manage assignments.

- **WIFOX-1231 - Improved Description & Comment Editing**

Text areas now auto-expand to fit content, preserve line breaks/formatting, and support up to 5,000 characters.

Business impact:

Ensures critical client notes and action descriptions remain readable and professionally formatted without technical character limits.

- **WIFOX-1157 - Compact Project Selection**

Removed redundant project key labels from the collapsed sidebar portal to simplify the project switching interface.

Business impact:

Reduces visual clutter, allowing managers to identify and switch between active projects more intuitively.

- **WIFOX-1232 - Flexible Data Pagination**

Added more granular "rows per page" options (up to 250) and increased the default view to 50 items.

Business impact:

Allows staff to process larger batches of data at once, reducing the need for repetitive "next page" clicks during audits.

- **WIFOX-1211 - Optimized Table Column Widths**

Refined the width of key columns in the client list to maximize visible data on a single screen.

Business impact:

Reduces horizontal scrolling, giving managers a more comprehensive view of client details at a glance.

☐ Trading Operations & Configuration

Refining the tools used to manage trading groups, symbols, and order execution.

- **WIFOX-1234 - Dedicated Margin Playground**

Separated the margin calculation helper into its own "Playground" drawer to prevent accidental changes to live symbol settings during experimentation.

Business impact:

Allows risk managers to safely test "what-if" scenarios for leverage and lot sizes without risking corruption of production trading parameters.

- **WIFOX-1222 - Real-Time Margin Preview with Client Context**

The symbol editor now allows admins to preview margin requirements by selecting a specific client and asset to see exact account-currency conversions and live rates.

Business impact:

Ensures absolute accuracy in trading configurations by showing exactly what a specific client will see in their terminal before settings are finalized.

- **WIFOX-1073 - Advanced Order Deletion with Financial Rollback**

WBCS now supports the deletion of executed (opened/closed) orders, which includes an atomic rollback of the client's balance and position removal.

Business impact:

Provides a powerful recovery tool for correcting major operational or technical errors, ensuring financial integrity is restored automatically.

- **WIFOX-1133 - Multi-Channel Order Sorting**

Implemented support for sorting orders by "remaining balance" across both the real-time Socket API and the CRM interface.

Business impact:

Enables better monitoring of partially filled orders, allowing trading desks to prioritize high-volume execution management.

- **WIFOX-1210 - Persistent Symbol Aliases**

Resolved an issue where custom symbol aliases would reset to system defaults during server restarts.

Business impact:

Guarantees that your branded or customized instrument names remain consistent for traders, regardless of system maintenance windows.

- **WIFOX-1223 - Enhanced Trading Group Assignments**

Added the ability to add specific symbol groups and improved the hover interaction for client trading cards.

Business impact:

Simplifies the onboarding of clients to specific trading conditions, reducing manual entry

for large groups of assets.

⚙ System Stability & Automation

Strengthening the platform's backend to ensure reliability and secure automated workflows.

- **WIFOX-1111 - Resilient Notification Message Handling**

Hardened the notification service to prevent process crashes during unexpected RabbitMQ disconnects or RPC reply failures.

Business impact:

Ensures that critical automated communications (emails/alerts) continue to function reliably without requiring manual service restarts.

- **WIFOX-1131 - Smart Data Caching for Faster Page Loads**

Implemented "cache-first" strategies for static or rarely updated data like currencies, languages, and statuses.

Business impact:

Massively improves platform responsiveness by reducing the number of redundant network requests as staff move between pages.

- **WIFOX-1208 - Transactional Desk Snapshots**

The system now captures a permanent "snapshot" of the client's desk at the moment a banking transaction occurs.

Business impact:

Provides bulletproof historical reporting and commission auditing, even if a client is reassigned to a different desk later.

- **WIFOX-1235 - Secure Client Existence Verification (Open API)**

Introduced a dedicated API endpoint and restricted permission to check for existing client records using identifiers without exposing full profiles.

Business impact:

Allows secure integration with external marketing or onboarding tools while strictly adhering to data privacy and "least privilege" security models.

- **WIFOX-1179 - ROOT Password Security Fix**

Resolved a critical bug that prevented password updates for top-level administrative accounts.

Business impact:

Restores essential security management capabilities for system owners, ensuring platform access remains protected.

📦 Lead & Bucket Management

Optimizing the flow of incoming leads and webmaster assignments.

- **WIFOX-976 - Modernized Sources Module**

Introduced a new design for Bucket Sources featuring advanced search, tagging, and direct webmaster assignment within the table.

Business impact:

Streamlines lead source management, allowing marketing teams to organize and assign incoming traffic with significantly less effort.

- **WIFOX-1201 - Searchable Desk & Manager Assignments**

Added search functionality to the "Desk" and "Manager" selection fields when assigning leads within buckets.

Business impact:

Enables rapid lead distribution even in large organizations where manual scrolling through team lists is no longer practical.

Release 1.27.0

☐☐ CRM & User Experience

We've focused on making the platform more intuitive and responsive, ensuring that your team can manage clients and operations with fewer clicks and better visibility.

- ☐☐ **High-Performance Navigation & Loading**

We overhauled the CRM shell to eliminate "infinite loading" states after logout and stabilized page reloads. Authenticated users will no longer be incorrectly redirected away from active pages while the system is bootstrapping. (WIFOX-1393, WIFOX-1294)

- ☐☐ **Standardized Date Management**

The date range picker now includes professional presets like "Last 7 Days" and "This Month." Additionally, clearing a date filter now correctly resets the calendar to the current month, removing the need for manual scrolling. (WIFOX-1049, WIFOX-1233)

- ☐☐ **Enhanced Search & Data Entry**

We've added searchable fields for "Desk" and "Manager" across client forms and lead buckets. You can now also search for clients directly by their Affiliate ID, significantly speeding up lead tracking. (WIFOX-1201, WIFOX-1347, WIFOX-1102)

- ☐☐ **Interface Polishing**

Table sorting preferences are now remembered automatically via local storage, and we've updated the filter icons and employee role displays to be more human-readable. (WIFOX-1268, WIFOX-1307, WIFOX-1289)

☐☐ Trading & Financial Operations

These updates improve the accuracy of client financial data and provide more flexibility for staff managing active trades.

- ☐☐ **Accurate Balance Aggregation**

Client balance summaries now correctly include "Total" funds rather than just "Available" amounts, providing a true reflection of a client's holdings across all integrated platforms. (WIFOX-1256)

- ☐☐ **Real-Time PnL Stability**

We stabilized the Profit & Loss (PnL) live update engine in the Traders Room. Multiple assets now update seamlessly within a single connection, ensuring clients see accurate valuations without system lag. (WIFOX-1379)

- **☑ Advanced Order Management**

Staff can now enter negative accumulated swap values when correcting orders, and the order modal has been redesigned with trading-specific terminology and smarter defaults for assets and symbols. (WIFOX-1264, WIFOX-1265)

- **🛡 Financial Integrity Fixes**

Resolved an issue where client balances were not updating immediately after certain order interactions (reopening or cloning), ensuring the CRM and Trading engine remain perfectly in sync. (WIFOX-1286)

☑ Security, Roles & Compliance

We've strengthened the platform's security model and refined how permissions are managed to support complex organizational structures.

- **☑ New "API" Role Class**

Introduced a dedicated "API" role type, allowing administrators to separate staff and affiliate access from technical integration keys. This includes a new tabbed interface for managing these roles efficiently. (WIFOX-1238)

- **☑ Lead Privacy Controls**

A new "Hidden Emails" permission has been added for the Affiliate Hub. This allows affiliates to manage their leads effectively while keeping sensitive contact information protected. (WIFOX-1279)

- **⚙ Independent Permission Management**

The Core Banking role editor has been decoupled, meaning toggling one right (like Transactions) will no longer automatically change unrelated permissions (like Invoices). This allows for true "least-privilege" role setup. (WIFOX-1378)

- **☑ Reliable Duplicate Detection**

We improved the client duplicates view to be more stable and project-aware. Managers can now investigate repeated registrations with accurate data and working pagination. (WIFOX-1267, WIFOX-1276)

⚙ System Reliability & Setup

Behind-the-scenes improvements to ensure the platform remains stable and easy to configure.

- **⬆ Resilient Data Streams**

The Access microservice now features "fail-fast" startup and self-healing data streams. If the connection to the database drops, the system automatically recovers without manual intervention. (WIFOX-1054)

- **☑ Flexible Configuration**

Administrators can now save project and bucket settings without being forced to enter optional data like "Region" or "Website" immediately, removing friction during initial

setup. (WIFOX-1280, WIFOX-1284)

- **Database Health**

We resolved several "uniqueness" rule conflicts in the database, ensuring that client phone numbers and action subtypes are validated correctly without blocking legitimate system maintenance. (WIFOX-1385)

Release 1.28.0

☐ CRM & User Experience Overhaul

Improving the speed, layout, and daily usability of the management interface.

- **WIFOX-1138 - Optimized Client Management Table**

The main client list has been redesigned for high-density viewing, featuring shortened IDs, merged login/IP columns, and smarter column ordering.

Business impact:

Reduces horizontal scrolling and visual clutter, allowing managers to scan and process client data significantly faster.

- **WIFOX-1393 - Reliable Logout & Session Termination**

Resolved a critical UI bug where the application would get stuck in an infinite loading state after a user logged out.

Business impact:

Ensures a professional and secure exit experience for staff, preventing confusion and potential security risks from "stuck" sessions.

- **WIFOX-1206 - Persistent Table Preferences**

The system now automatically remembers your "Rows per page" selection via local storage, so your preferred view is ready every time you log in.

Business impact:

Saves time for power users who prefer high-density data views, removing the need for repetitive manual adjustments.

- **WIFOX-1324 - UI Performance & Freeze Prevention**

Fixed several technical bottlenecks that caused the interface to "hang" during table translations and data updates.

Business impact:

Provides a smoother, more responsive experience for staff, reducing frustration and downtime caused by manual page reloads.

- **WIFOX-1098 - One-Click Email Copying**

Added a dedicated copy icon next to client email addresses in Clients and Assets modules.

Business impact:

Streamlines manual outreach and support workflows by removing the need to highlight and copy text manually.

☐ Trading Operations & Financial Integrity

Refining the tools used to manage trading groups, order execution, and account balances.

- **WIFOX-1302 - Bulk Order Execution (Multi-Trade)**

Introduced the ability to open a single trade for multiple selected clients simultaneously with identical parameters.

Business impact:

Massively increases operational efficiency for account managers, allowing for instant, synchronized trade placement across entire client groups.

- **WIFOX-1407 - Immutable Balance Snapshots**

The system now captures and displays "Balance Before Close" and "Balance After Close" for every order, ensuring these values remain accurate even after post-close edits.

Business impact:

Provides absolute financial transparency and a reliable audit trail for support teams investigating client balance discrepancies.

- **WIFOX-1072 - Instant Default Trading Group Assignment**

Administrators can now set a new "Default" trading group directly from the list view with a single click.

Business impact:

Simplifies the management of onboarding conditions, ensuring new clients are always assigned to the correct current market environment.

- **WIFOX-1315 - Comprehensive Order Edit Logging**

Every manual adjustment made to an order by staff is now recorded in a detailed history log.

Business impact:

Protects the business against internal errors and provides a clear "who-what-when" record for compliance and risk management.

- **WIFOX-1128 - Advanced Trading Hours Management**

Implemented a flexible "Working Hours" concept that supports complex UTC-based schedules, including multiple intervals per day and weekend rules.

Business impact:

Ensures automated trading and order placement strictly adhere to market sessions, preventing execution errors during closed hours.

Security, Roles & Compliance

Strengthening the platform's security model and refining how permissions are managed.

- **WIFOX-1417 - Granular Audit Log Permissions**

Decoupled "Client Sessions" and "Employee Logs" from general system logs, allowing them to be toggled independently in the role editor.

Business impact:

Enables a "least-privilege" security model where staff can review specific activity histories without gaining access to sensitive organization-wide audit data.

- **WIFOX-1144 - Enhanced Visual Data Auditing**

Upgraded the log service to show a "visual-friendly" difference (Diff) for updates, making it clear exactly which fields were changed.

Business impact:

Allows compliance officers to identify specific data changes in seconds without having to parse complex technical data formats.

- **WIFOX-1217 - Clean Manager Assignment Lists**

The system now automatically hides inactive managers from selection dropdowns in the Actions and Clients modules.

Business impact:

Prevents accidental assignment of tasks or clients to former employees, ensuring operational continuity.

- **WIFOX-1439 - Smart Phone Number Parsing**

The registration system now intelligently handles phone numbers entered without the "+" prefix.

Business impact:

Reduces friction during client onboarding and prevents data entry errors that could break SMS or telephony integrations.

System Reliability & Localization

Behind-the-scenes work to ensure data integrity and platform stability.

- **WIFOX-1408 - Advanced Translation Management API**

Introduced a full suite of admin operations (bulk create, update, delete) for managing system and client-area translations.

Business impact:

Empowers product teams to localize the platform for new markets faster and with more reliable automated tools.

- **WIFOX-1410 - Independent Client-Area Sync**

Separated the configuration for client-area translations from the main CRM, allowing for independent management of tenant-specific content.

Business impact:

Provides more flexibility for multi-brand operations, ensuring that public-facing texts can be updated without affecting internal management tools.

Release 1.29.0

☐ CRM & User Experience

Improving the speed, layout, and daily usability of the management interface.

- **WIFOX-1048 - Standardized Table Footers**

Implemented a unified footer pattern across all CRM modules, including total record counts, rows-per-page selectors, and pagination controls.

Business impact:

Provides managers with instant insights into dataset sizes and a consistent navigation experience across all data tables.

- **WIFOX-1586 - High-Density Data Viewing**

Set the default "Rows per page" to 50 for all CRM modules to reduce repetitive navigation.

Business impact:

Allows staff to process larger batches of data at once, significantly speeding up daily auditing and review tasks.

- **WIFOX-1488 - Persistent Table Customizations**

Resolved an issue where user-selected column visibility, order, and page-size preferences would reset after a page reload.

Business impact:

Saves time for power users by remembering their preferred workspace layout, removing the need for repetitive manual reconfiguration.

- **WIFOX-1501 - Improved Client List Readability**

Restored "Last Login" and "IP Address" as separate, independently sortable columns in the client list.

Business impact:

Allows security and support teams to quickly identify and sort clients by their most recent activity or connection origin.

- **WIFOX-1377 - Sidebar Navigation Polishing**

Fixed a visual glitch in the sidebar scrolling behavior to ensure all menu options remain clearly visible.

Business impact:

Delivers a more professional and reliable interface for staff navigating complex menu structures.

☐ Trading Operations & Risk Management

Refining the tools used to manage trading groups, order execution, and real-time market data.

- **WIFOX-1302 - Bulk Order Execution (Multi-Trade)**

Introduced the ability to open a single trade for multiple selected clients simultaneously with identical parameters.

Business impact:

Massively increases operational efficiency for account managers, allowing for instant, synchronized trade placement across entire client groups.

- **WIFOX-1436 - Flexible Swap Configuration**

Administrators can now set "Swap Long" and "Swap Short" as negative values to simulate real-market conditions where traders can earn interest.

Business impact:

Allows the business to offer more competitive and realistic trading conditions, attracting professional traders who utilize carry-trade strategies.

- **WIFOX-1579 - Advanced Manual Pricing Controls**

Enhanced the price delta and quote tick tools with an "Exact Price" mode, optional market noise, and automatic pre-filling from live rates.

Business impact:

Gives trading support teams surgical precision over instrument pricing, allowing for controlled variability and faster manual overrides.

- **WIFOX-1596 - Professional Price Entry Interface**

Redesigned the price input fields to support trading-style digit entry (right-to-left) and cursor-aware stepping with arrow keys.

Business impact:

Reduces the risk of manual data entry errors when staff are adjusting critical market prices under high-pressure conditions.

- **WIFOX-840 - Critical Trading Event Notifications**

Extended the notification service to send immediate "Margin Call" and "Stop Out" alerts to both managers and clients via CRM, Client Area, and Email.

Business impact:

Ensures immediate awareness of high-risk account states, reducing potential losses and improving client communication during volatile market moves.

Security, Roles & Compliance

Strengthening the platform's security model and refining how permissions are managed.

- **WIFOX-1484 - Bulk Project Migration with Safeguards**

Implemented a new "Bulk Change Project" flow that detects identifier conflicts (duplicates) in the target project before the move is finalized.

Business impact:

Allows managers to move large client groups between projects safely, with clear visibility into who will be skipped and why, preventing data corruption.

- **WIFOX-1376 - Rapid Role Configuration**

Added a "Clone" feature for user roles, allowing administrators to create new permission sets based on existing templates.

Business impact:

Significantly reduces the administrative overhead of setting up complex organizational structures and new team permissions.

- **WIFOX-1217 - Clean Manager Assignment Lists**

The system now automatically hides inactive managers from selection dropdowns in the Actions and Clients modules.

Business impact:

Prevents accidental assignment of tasks or clients to former employees, ensuring operational continuity and accurate task tracking.

- **WIFOX-1495 - Global View Management Permissions**

Introduced a dedicated permission for reordering shared "Fast Filters" (saved views) across CRM, banking, and trading.

Business impact:

Enables a "least-privilege" security model where only authorized administrators can change the standard view order for the entire organization.

System Reliability & Analytics

Behind-the-scenes work to ensure data integrity, platform stability, and accurate reporting.

- **WIFOX-1601 - Stabilized Bucket Analytics Dashboard**

Fixed layout overflows and "undefined" data labels in the bucket analytics view, ensuring zero values are displayed correctly.

Business impact:

Provides marketing and affiliate managers with a reliable, professional dashboard for tracking lead sources and conversion performance.

- **WIFOX-943 - Accurate Manager Performance Tracking**

Resolved discrepancies in manager analytics, ensuring that client assignments and completed transactions are recorded correctly for performance reviews.

Business impact:

Guarantees that internal KPIs and bonus calculations are based on 100% accurate operational data.

- **WIFOX-1498 - Actionable Error Messaging**

Upgraded the notification system to surface the real backend reason for rejected actions instead of a generic "server not available" message.

Business impact:

Empowers users to fix their own input errors (e.g., "trading session closed") without opening unnecessary support tickets.

- **WIFOX-1506 - CrocoCalls Telephony Integration**

Successfully integrated the CrocoCalls VoIP provider into the CRM telephony suite.

Business impact:

Expands the communication options for sales teams, allowing for seamless click-to-call functionality through a new supported provider.

Release 1.30.0

☐ CRM & User Experience

Improving the speed, layout, and daily usability of the management interface.

- **WIFOX-1418 - Extended Client Overview Drawer**

Redesigned the client drawer to utilize empty space more efficiently, displaying additional key customer data directly in the quick-view panel.

Business impact:

Allows managers to review critical client details faster, reducing the need to open full edit cards for routine information checks.

- **WIFOX-1555 - Visual Navigation History**

Added visual highlighting for the most recently viewed client when returning from a profile back to the main list.

Business impact:

Helps staff maintain their place in high-volume workflows, preventing repetitive searching and improving overall processing speed.

- **WIFOX-1643 - Enhanced Profile Awareness**

The client profile now features a prominent "Duplicates" badge, real-time online status icons, and a more readable residence layout with flags and full country names.

Business impact:

Provides immediate operational context (e.g., if a client is currently online or has multiple registrations) directly where staff work.

- **WIFOX-1554 - Customizable Column Pinning**

Introduced the ability to pin important columns (like Client Name) to the left or right of data tables.

Business impact:

Ensures critical identifiers remain visible even when scrolling through wide datasets, improving data accuracy and readability.

- **WIFOX-1110 - Reliable Table Persistence**

Resolved issues where adding or deleting columns would cause layout inconsistencies or reset user preferences.

Business impact:

Ensures a stable, personalized workspace for every manager that remains consistent across sessions.

☐ Trading Operations & Risk Management

Refining the tools used to manage trading groups, order execution, and real-time market data.

- **WIFOX-1609 - Detailed Stop-Out Notifications**

Enhanced forced liquidation alerts to include the specific margin level and structured details of the affected orders (ID, pair, side, size).

Business impact:

Provides immediate clarity to both clients and managers during liquidation events, reducing support overhead and increasing transparency.

- **WIFOX-1635 - Unified Live PnL & Margin Display**

Synchronized real-time profit/loss and used margin calculations between the client terminal and the back-office orders screen.

Business impact:

Ensures staff and clients see identical financial data, building trust and simplifying technical support for active trades.

- **WIFOX-1587 - Smart Order Submission Controls**

The system now automatically disables the "Submit" button in the order modal when the relevant market is closed.

Business impact:

Reduces trader frustration and support tickets by preventing attempts to trade during non-market hours.

- **WIFOX-1639 - Robust TP/SL Configuration**

Fixed a bug where clearing a Take Profit or Stop Loss value would accidentally uncheck the feature entirely.

Business impact:

Prevents accidental removal of risk management settings and ensures that empty fields are caught by validation instead of silent disabling.

- **WIFOX-1147 - Resilient Order Batch Processing**

Isolated per-order failures during PnL enrichment, ensuring that a single misconfigured client doesn't block the display of data for an entire batch.

Business impact:

Maintains system responsiveness and data visibility for the majority of clients even when individual data errors occur.

Security, Roles & Compliance

Strengthening the platform's security model and refining how permissions are managed.

- **WIFOX-1623 - Secure Bulk Client Management**

Enforced strict access rules for bulk reassign and bulk update actions, ensuring operators can only affect clients within their permitted project and desk scope.

Business impact:

Prevents unauthorized data changes and ensures that "Select All" actions strictly respect

the manager's organizational boundaries.

- **WIFOX-1160 - Granular "Change Status" Permission**

Introduced a dedicated permission that allows users to update request statuses without granting full edit access to other sensitive fields.

Business impact:

Enables a "least-privilege" security model where operational staff can move workflows forward without risking accidental data modification.

- **WIFOX-1376 - Rapid Role Configuration**

Added a "Clone" feature for user roles, allowing administrators to create new permission sets based on existing templates.

Business impact:

Significantly reduces the administrative overhead of setting up complex organizational structures and new team permissions.

- **WIFOX-300 - Automated Log Retention**

Implemented a configurable log retention policy (defaulting to 1 year) to automatically remove older data from the database.

Business impact:

Ensures long-term system performance and helps the business comply with data privacy and storage regulations.

System Reliability & Integrations

Behind-the-scenes work to ensure data integrity, platform stability, and accurate reporting.

- **WIFOX-1470 - Flexible Withdrawal System Management**

Introduced the ability to enable or disable specific withdrawal systems directly from the CRM, matching the existing approach for deposit systems.

Business impact:

Allows administrators to instantly halt specific payout channels for maintenance or risk management without a full system restart.

- **WIFOX-1615 - Post-Creation Platform Selection**

Enabled the ability to set or change the external trading platform association for existing client accounts.

Business impact:

Allows staff to correct setup errors or migrate accounts between platforms without having to delete and recreate them.

- **WIFOX-1649 - Accurate Historical Desk Reporting**

Fixed the "Owner's Desk" column in transactions to correctly display the desk name from the time of the transaction, even if the desk has since been renamed or removed.

Business impact:

Guarantees the accuracy of historical financial reports for auditing and commission calculations.

- **WIFOX-1617 - Streamlined CI/CD Build Routing**

Consolidated the build process for the trading terminal backend into the standard WTCS

build pipeline.

Business impact:

Reduces the risk of version mismatches and speeds up the delivery of new features to production environments.

Release 1.15.3

1. Stronger control and configuration of client actions

WIFOX-241 - Manage Action Types and Subtypes via Settings

Action types and their subtypes are now fully configurable on a dedicated Settings page, similar to client/request statuses.

Business impact: Business/ops teams can adjust action structures (types, subtypes, ordering) without code changes, keeping the CRM aligned with evolving processes.

WIFOX-236 - Ordering for action subtypes

Subtypes of actions can be reordered via drag & drop, and this order is reflected in dropdowns when creating actions.

Business impact: The most important subtypes appear first, speeding up daily work and reducing misclassification.

WIFOX-215 - Ability to change action subtype on Actions

If an agent selects the wrong subtype for an action, the creator (or any role with edit permissions) can now correct the subtype.

Business impact: Reduces data pollution from misclassified actions and improves accuracy of reports and KPIs based on action subtypes.

WIFOX-245 - Transaction visibility aligned with role-based access rules

Transaction visibility has been validated and aligned with existing role-based permissions across desks, projects, and clients (“view own” vs “view all”), enforced on the backend.

Business impact: Lowers the risk of exposing sensitive transaction data and ensures consistent, audit-friendly access behavior across the platform.

2. Better visibility and management of leads

WIFOX-248 - Backend aggregation of “Leads today” and “Unassigned leads” per bucket

The backend now calculates, per bucket, how many leads were created today and how many remain unassigned, while keeping existing APIs backward compatible.

Business impact: Managers gain real-time insight into daily lead inflow and backlog, enabling

faster staffing and prioritization decisions.

WIFOX-247 - New Buckets table view with key metrics

The Buckets page has been redesigned from cards to a table view with columns for “Leads today” and “Unassigned leads”, and clickable bucket names.

Business impact: It is easier to scan and compare buckets, quickly identify overloaded areas, and rebalance work.

3. Improved filters, search, and bulk work with clients

WIFOX-249 - Client name filtering supports special characters

Filtering clients by first/last name now works correctly when special characters (such as

Business impact: Searches match real-world data more reliably, reducing missed results and manual workarounds.

WIFOX-242 - Revised multi-client selection via checkboxes

Checkbox selection in client lists has been redesigned (using a proven CRM pattern) to work reliably when clicking and scrolling, with a clear count of selected clients.

Business impact: Bulk actions on clients are more predictable and efficient, reducing selection mistakes and rework.

WIFOX-230 - Fixed inappropriate error when sorting by name

An incorrect/misleading error that appeared when sorting Clients/Requests by name has been removed.

Business impact: Fewer confusing error states and smoother navigation for users.

WIFOX-255 - Warning in clients' comments section now renders correctly

A previously missing warning message in the clients' comments section is now displayed properly.

Business impact: Users receive the intended guidance or restrictions when working with comments, reducing misuse and support questions.

WIFOX-251 - Fast filter customization now respected

Customizations to which fields appear in fast filters are now correctly applied; fields that are turned off remain hidden when reusing saved filters.

Business impact: Filters behave consistently with user expectations, saving time and reducing confusion.

WIFOX-250 - Easier management of fast filters across modules

Users can now remove fast filters directly from the filter popover, and the unified “other filters” view has been added to all modules that use fast filters (with minor UI clean-ups such as removing

unnecessary arrows).

Business impact: Fast filters are easier to manage and clean up, giving users more control over how they slice data across different modules.

4. Stability and reliability

BD-256 - Sessions page fixed (blank screen)

A critical defect that caused the Sessions page to show a blank screen has been resolved.

Business impact: Restores access to session information required for daily operations and reduces downtime.

Release 1.16.0

1. Faster daily work with clients & actions

WIFOX-286 - “Create action” directly from Clients table

Agents can now start creating an action straight from the Clients list, without opening the client card first.

Business impact: Speeds up handling of follow-ups and notes, reducing clicks for high-volume teams.

WIFOX-272 - “Save and create new” in Actions drawer

The action-creation form now has a “Save and create new” button that saves the current action and instantly opens a clean form for the next one.

Business impact: Makes bulk creation of actions significantly quicker for teams processing multiple cases in a row.

WIFOX-273 - Richer Actions table in client drawer

The Actions table inside the client view now shows more lifecycle data (date, type, subtype, comments, created dates, creator, responsible) with sorting and horizontal scrolling.

Business impact: Improves auditability and lets managers see the full history and responsibility for client actions without leaving the client view.

WIFOX-290 - Filter and customize “Last/Future action date” in Clients

“Last action date” and “Future action date” in the Clients table now support date-range filters and can be shown/hidden via column customization, with full sorting support.

Business impact: Managers can build views like “who needs attention this week” or “who had no actions in the last 30 days” directly in the UI.

WIFOX-271 - Correct sorting by action dates in Clients

Sorting by “Last action date” and “Future action date” in the Clients list has been fixed to reflect real action timelines.

Business impact: Prioritisation views are now trustworthy and match what agents actually did or plan to do.

WIFOX-291 - Less intrusive notifications across CRM

System notifications have been moved to the top-right corner and no longer block navigation or top sections.

Business impact: Reduces interruptions during client work and lets agents continue navigating while messages are shown.

WIFOX-318 - Easier-to-click Back button in client card

The Back button in the client card has been redesigned with a larger clickable area and improved positioning.

Business impact: Fewer mis-clicks and smoother navigation for users who move frequently between clients and lists.

2. Stronger navigation & filtering across the platform

WIFOX-277 - Links behave like native browser links

All user-clickable navigation in CRM has been refactored to use real links instead of code-only redirects, across all microfrontends.

Business impact: Users can reliably open items in new tabs/windows using familiar browser actions (right-click, middle-click, Ctrl/Cmd+click), improving productivity for power users.

WICORE-1428 - “Now” support in date-time filters

The date-time filter widget can now use the current time (“Now”) as the end of a range, sent dynamically on each request.

Business impact: Easier creation of “up to this moment” views for monitoring and reporting without manually updating end dates.

3. Better client and transaction context for operations & risk

WIFOX-243 - Bulk edit for key client attributes

A new Bulk Edit action lets agents update fields like Affiliate ID, Source ID, Campaign ID and Country for many clients at once, with a safe “Leave existing” default and explicit opt-in per field.

Business impact: Mass corrections and campaign updates become much faster, while minimising the risk of accidental global changes.

WIFOX-244 - Read-only total balance in client card

Client cards now show a read-only total balance (from Core Banking) across all assets, in both view and edit modes, when the banking service is available.

Business impact: Support, sales and risk teams see the full financial picture at a glance without

navigating to other systems.

WIFOX-217 - More card details in transaction descriptions

When available from providers, additional card-related information is now included in transaction descriptions.

Business impact: Gives finance and risk teams more context for investigations and manual checks, without digging through raw data.

4. Improved transaction handling and table usability

WIFOX-296 - Edit transactions from the table

Authorized employees can now use a new Edit action in the Transactions table to update status and description via a drawer, with changes tracked in transaction history.

Business impact: Enables quick correction and enrichment of transaction records and provides an auditable trail of edits.

WIFOX-297 - Configurable auto-login on simple client registration

A new per-client-type setting controls whether “simple” registered/imported clients are auto-logged-in (and get `lastLoginDate`) or not.

Business impact: Prevents imported clients from looking “active” when they never logged in, improving the accuracy of activity-based metrics.

WIFOX-298 - Clearer table endings (no confusing bottom blur)

The visual blur/fade at the bottom of tables has been removed or refined according to the new UX, ensuring the last rows are fully visible.

Business impact: Users immediately understand when they’ve reached the end of a list, reducing confusion about hidden rows.

WIFOX-299 - “Client” column in Transactions table

A new Client column shows the transaction owner’s name and allows opening the client drawer directly; it is filterable and can be managed via column customization.

Business impact: Investigations and support become faster by linking each transaction directly to its client profile from the same table.

WIFOX-217 - More card details in transaction descriptions

When available from providers, additional card-related information is now included in transaction descriptions.

Business impact: Gives finance and risk teams more context for investigations and manual checks, without digging through raw data.

5. Trading operations improvements

WIFOX-266 - Trading: Orders: Allow to change order executed day

Added the ability to edit the order executed date/time for open orders in the Trading->Orders section of the CRM

Release 1.16.1

1. Fix: White screen on client form (nationalities field)

WIFOX-376 - White screen on client's form due to nationalities field

We fixed an issue where opening a client form could result in a blank (white) screen when the nationalities field contained unexpected or incompatible data. The handling of this field has been corrected so the form always renders safely, regardless of the nationality values stored for the client.

Business impact:

- Client profiles are now reliably accessible, even for edge-case nationality data.
 - Reduces disruption for support and operations teams working with affected clients.
 - Eliminates the need for technical intervention to “unblock” specific client records.
-

2. Additional hardening: client-side caching removed

Client UI caching removal (no task key)

In addition to the nationality fix, we also removed problematic client-side caching behavior. Previously, the browser could reuse stale cached data, causing users to see outdated information after changes were made elsewhere in the system. The UI now fetches fresh data from the server when needed instead of relying on that cache.

Business impact:

- Users see up-to-date data more consistently.
- Fewer “stale screen” incidents and related support tickets.
- Increased confidence that what operators see on screen matches the real system state.

Release 1.17.0

1. Trading: better control and visibility

WIFOX-266 - Trading: change execution day for open orders

Trading managers can now correct the **executed day/date** of open orders in the trading orders screen.

Business impact:

- Operational teams can fix wrong execution dates without technical help.
- Reports, positions and reconciliations better reflect the real intended trading timeline.

WIFOX-238 - Trading configuration: “All” tab for symbols

A new **“All”** tab in trading configuration shows the full list of symbols and is selected by default. Search works on the complete symbol set.

Business impact:

- Dealers and admins see all instruments in one place.
 - Faster symbol lookup and fewer configuration mistakes.
-

2. Faster day-to-day work in the client area

WIFOX-237 - Fast “Create Action” from client card

In the client view, a **+ Add** button above the Actions table opens a focused “create action” form for that client, with the client prefilled and locked.

Business impact:

- Managers and agents can log actions for a client without leaving the client card.
- Speeds up follow-ups and improves accuracy of action history.

WIFOX-328 - “Completed by default” configuration per Action Type

Each Action Type in `/settings/actions` now has a “**Completed by default**” flag. If enabled (e.g. for comment-style actions), newly created actions of that type are pre-marked as **Completed** across all creation entry points, while still allowing manual override.

Business impact:

- Fewer clicks for actions that are always done at the moment of creation (e.g. logging a note).
- More consistent action statuses and more reliable action-based reporting.

WIFOX-318 - Easier-to-click Back button in client card

The Back button in the client form was redesigned to have a larger, more forgiving click area and better placement.

Business impact:

- Smoother navigation between client lists and details.
- Fewer mis-clicks into the side menu during intensive work.

WIFOX-295 - More usable comment text area

The Comments textarea in the client edit form has been implemented according to the new design (larger and more comfortable for long text).

Business impact:

- Agents can enter and review long, structured notes without friction.
- Better documentation and handover between teams.

WIFOX-240 - Horizontal scrollbars stay visible when zooming

Tables now keep their **horizontal scrollbars** visible even when browser zoom is changed.

Business impact:

- Agents always have a clear way to scroll horizontally to see all columns.
- Reduces training and frustration for desktop users working with wide tables.

WIFOX-277 - All navigation behaves like native browser links

Clickable navigation elements across CRM now behave like real browser links (open in new tab/window, right-click menu, middle-click, Ctrl/Cmd+click).

Business impact:

- Power users can open multiple clients, buckets or analytics views in parallel.
- UX is more predictable across browsers and operating systems.

WIFOX-385 - Add desk/project members without losing search results

When adding members to a **Desk** or employees to a **Project**, the **search results now remain visible** after each person is added; the search term and results are preserved so multiple people can be added in sequence.

Business impact:

- Speeds up onboarding and configuration when many employees need to be added at once.
 - Reduces frustration from “disappearing” results and lowers the chance of configuration errors.
-

3. Buckets & leads: better context and one-click focus

WIFOX-325 - “Only unassigned leads” fast toggle (per bucket)

On the bucket **Leads** tab, a toggle above the table switches between **all leads** and **only unassigned leads**, and this preference is remembered separately for each bucket.

Business impact:

- Team leads can instantly focus on leads that still need an owner.
- Each bucket “remembers” how its leads are usually viewed, reducing repetitive filter setup.

WIFOX-327 - “Campaign ID” column in bucket leads

The bucket leads table now has a “**Campaign ID**” column (with sorting and text filter) showing the campaign from the client record.

Business impact:

- Marketing and sales can quickly slice leads by campaign.
- Easier analysis of which campaigns feed each bucket.

WIFOX-360 - “Country” column in bucket leads (sortable & filterable)

The Bucket → Leads table now has a **Country** column (after FTD) with full support for sorting and filtering by country.

Business impact:

- Managers can quickly focus on leads from specific regions without exports.
- Improves geographic analysis and regional allocation directly in the CRM.

WIFOX-331 - Open client card from lead + clean URL

From a lead view in Buckets, users can now open the **standard client view card** for the related client. At the same time, the route typo was fixed from `/lead` to `/lead`.

Business impact:

- One click from a lead directly to the full client profile, with all usual permissions.
- Cleaner, more consistent URLs for bookmarking and navigation.

WIFOX-332 - Buckets open on Leads tab by default

When opening a bucket page without specifying a tab, the system now lands on the **Leads** tab instead of Analytics.

Business impact:

- Buckets open directly on the main operational view used by agents.
- Less extra clicking for everyday lead handling.

WIFOX-329 - Buckets: default Leads tab now works in all languages

The logic for opening the **Leads** tab by default in bucket views was refactored to use internal keys rather than translated labels, so it behaves correctly across **all UI languages**.

Business impact:

- Non-English users land on a valid, populated tab instead of hitting empty or incorrect tabs.
- Fewer locale-specific glitches and support tickets.

WIFOX-355 - “Desk” column with sorting & filtering in bucket leads

The bucket leads table now shows a **Desk** column and allows sorting and filtering by desk.

Business impact:

- Managers can see which desk each lead belongs to and quickly re-focus by desk.
- Better support for desk-based performance monitoring and balancing.

4. Tradersroom imports & Open API: fewer failed registrations

WIFOX-322 - More tolerant validation for Tradersroom fast registration/import

Tradersroom import / fast registration forms now:

- Accept more real-world email formats.
- Automatically strip non-numeric characters from pasted phone numbers.
- Allow any characters in first/last names.

Business impact:

- Fewer failed imports due to overly strict validation.
- Less manual “data cleaning” before uploading partner files.

WIFOX-324 - Clear duplicate error for client registration (Open API)

When a client registration via Open API hits a duplicate, the API now returns a **clear, machine-**

readable duplicate error (dedicated status and error code).

Business impact:

- Affiliates and integrators can correctly detect duplicates and avoid retry loops.
 - Easier error handling and more predictable partner integrations.
-

5. Tables & filters: clearer, more consistent behaviour

WIFOX-361 - Auto-select & lock Project in Fast Filters (single-project mode)

If a CRM instance has only **one project**, Fast Filters now automatically select that project and make it read-only, clearing other pre-filled values.

Business impact:

- Users no longer need to repeatedly choose the only available project.
- Fewer misconfigurations and faster filter setup.

WIFOX-353 - “Message” renamed to “Description” in Actions tables

In all Actions-related tables (Actions module and client views), the column previously labeled **“Message”** is now consistently labeled **“Description”**.

Business impact:

- Terminology matches what business users expect.
- Less confusion when reading or training on Actions-related reports.

Release 1.18.0

1. Stronger client audit and action visibility

WIFOX-282 - Full client activity log in Sessions tab

The **Sessions** tab on the client card now shows a unified activity log combining:

- client actions across CRM, Tradersroom and Trading Terminal (logins, navigation, transactions, trading, profile changes, etc.), and
- manager actions on that client (opening/editing the client, creating/updating actions, tickets, bulk ops, etc.).

Entries include timestamp, actor (client/manager), source app, event type, human-readable message, and technical metadata, with pagination, sorting and filtering.

Business impact:

- Provides a single audit trail for investigations, disputes and compliance checks.
 - Reduces time to understand “who did what and when” for any client across all channels.
-

WIFOX-386 - “Actions exist” indicator & filter in Clients table

The Clients table now has an “**Actions exist**” column (☐/☐) backed by a persistent `isActionsExist` flag on the client, updated whenever actions are created or deleted. The column is filterable and can be toggled via Customize Columns.

Business impact:

- Teams can instantly see which clients have any history of actions, and filter to “with actions” or “no actions yet.”
 - Makes it easier to find untouched clients or ensure that key segments are actually being worked.
-

2. Buckets & leads: better controls and reprocessing

WIFOX-326 - Buckets / Leads: “Only FTD” fast toggle with per-bucket memory

On `/buckets/:id/leads`, a new “Only FTD” toggle above the table filters leads to first-time depositors when ON, and shows all leads when OFF. Its state is stored **per bucket** (alongside other bucket toggles).

Business impact:

- Sales and retention teams can focus on FTD leads in one click, per bucket.
 - Each bucket remembers its FTD preference, reducing repetitive setup.
-

WIFOX-354 - Allow reprocessing of already processed leads (with permission)

Leads that were previously processed can now be **selected and reprocessed** from the Bucket → Leads tab, but only for roles that have the new permission `buckets.submodules.leads.reprocessing`.

- With permission: processed leads remain visually distinct but become selectable for (re)processing.
- Without permission: behaviour stays as before; processed leads can’t be reprocessed and users get clear “no permission” feedback.

Business impact:

- Enables controlled reprocessing flows (e.g. when strategies change) without hacks or data workarounds.
 - Keeps risk and analytics under control by gating reprocessing behind an explicit role right.
-

WIFOX-419 - “Full name” column + first/last name filters in bucket leads

On the Bucket → Leads tab, a new “Full name” column (after ID) shows `<First name> <Last name>`, supports sorting, and is backed by **two separate filters**: First name and Last name.

Business impact:

- Operators can quickly locate and sort leads by name directly in the bucket view.
 - Name-based searches become more precise and flexible (filter by first, last, or both).
-

3. Clients table: smarter duplicate and action indicators

WIFOX-323 - “Last duplicate date” in Clients table

A new **Last duplicate date** field is now stored on the client and surfaced as an optional column in the Clients table, with sorting, date-range filtering (Fast Filters) and Customize Columns support.

Business impact:

- Lets teams prioritise clients recently detected as duplicates and analyse the recency of duplicate events.
 - Improves data-quality monitoring by making duplicate activity visible over time.
-

4. Client status & trading access

WIFOX-444 - New client status “Pending - Authorized”

A new status **Pending - Authorized** has been introduced and treated as “authorized for trading” across the core system, trading platform and related services:

- Users in **Pending - Authorized** can do everything that **Completed** users can (including trading).
- Verification still appears as pending in the personal area.
- Transitions to **Rejected** from Completed or Pending - Authorized fully block top-ups, new orders, closing/editing orders, and withdrawals.

Business impact:

- Allows the business to grant full trading access earlier while continuing KYC/verification processes.
 - Separates trading authorisation from full profile completion in a controlled, explicit way.
-

5. Global UX and safety improvements

WIFOX-416 - Language selector dropdown always visible over Fast Filters

The language switcher dropdown now correctly appears **above** the Fast Filters panel across all pages and services where both are present.

Business impact:

- International users can change language at any time, even with filters open.
 - Removes a confusing UI clash and avoids support tickets around “stuck” language.
-

WIFOX-417 - Transactions: masked “Source card number” column + filter

The Transactions table now includes a “**Source card number**” column for Bridge Pay card transactions, showing only `first4*****last4` and never the full PAN. A fast filter is available that works strictly on first4+last4. The column is configurable via Customize Columns.

Business impact:

- Operations and fraud/risk teams can identify transactions by card in a safe, compliant way.
 - Improves investigations without exposing sensitive card data or weakening compliance posture.
-

WIFOX-442 - Requests Module: “Customize Columns” with Pinned Core Columns

In the **Requests** module, a new “**Customize columns**” feature has been added to the main table. Users can now:

- Open a **Customize columns** panel from the Requests table.
- **Show/hide and reorder** all non-core columns.
- Have their configuration **persist after page reloads** (per user).

Business impact:

- Request handlers and managers can tailor the Requests table to their role (hide noise, prioritise key fields) without losing critical information.
- Core, business-critical columns are always present and in a predictable order, which protects reporting, training, and operational procedures.
- Persistent per-user layouts reduce repetitive UI adjustments and speed up daily work in the Requests module.

Release 1.19.0

1. Safer financial operations: accounts, assets, and transactions

WIFOX-540 - Safe delete for Accounts & Assets (with rights and checks)

CRM now supports deleting **Accounts** and **Assets** from their modules, but only under strict conditions:

- Separate rights: “Accounts → Delete” and “Assets → Delete”.
- Delete action is shown only if the user has the right.
- Backend blocks deletion if:
 - an asset has any balance or transactions, or
 - an account contains any assets with balance or transactions.

Business impact:

- Admins can clean up unused accounts/assets without risking financial history.
 - Hard backend checks prevent accidental loss of data or money movements.
-

WIFOX-541 - Cancel internal transactions with “Canceled by manager” + reason + balance check

For **internal** transactions, managers can now set status “**Canceled by manager**”:

- Only available for `provider = internal`.
- A **reason** is mandatory and stored on the transaction.
- When canceling deposits, the system checks the client’s current balance; if there’s not enough balance to reverse the deposit, cancellation is blocked with a clear error.

Business impact:

- Gives operations a clean, auditable way to cancel internal deposits.
 - Prevents negative balances and inconsistencies when reversing funds.
-

2. Clients module: faster actions and better segmentation

WIFOX-519 - “Add action” promoted to quick action in Clients table

In **CRM** → **Clients**, “Add action” is now a visible quick-action icon directly in each row, right after Edit, instead of being hidden in the “;” menu.

Business impact:

- Managers can create client actions in one click from the main list.
 - Speeds up daily follow-up and reduces extra clicks for high-volume teams.
-

WIFOX-591 - New “Source ID” column + filter in Clients table

The Clients table now has a “Source ID” column (after “Affiliate ID”) with:

- Display from `client.sourceid` (or equivalent).
- Text filter by Source ID.
- Inclusion in **Customize columns** (can be shown/hidden, order controlled per user).

Business impact:

- Business can quickly slice clients by acquisition source directly in the main Clients view.
 - Easier analysis of which sources generate which clients, without exports.
-

3. Fast filters and search: clearer, global vs personal, and always-visible search

WIFOX-321 - Clear visual separation of Global vs Personal fast filters

Fast filters across CRM (Clients, Requests, Actions, Transactions, etc.) now visually distinguish **Global** filters from **Personal** ones (using the approved design), without relying on the old “(G)” text suffix.

Business impact:

- Users instantly see which filters are organisation-wide and which are their own.
 - Less confusion, fewer mistakes when saving, editing, or teaching others to use filters.
-

WIFOX-517 - Move search out of Fast Filters and place above tables

In all relevant modules, the **search field** has been moved:

- Out of the Fast Filters panel.
- Into the main table header area, always visible above the table.
Existing saved Fast Filters that contained search parameters were migrated so nothing breaks.

Business impact:

- Search is now obvious and one-click for all users.
 - Fast Filters are cleaner and focused on structured conditions, while saved filters continue to work.
-

4. Actions module: better filters and more complete data

WIFOX-518 - Redesigned “Subtypes” selector in Actions Fast Filters

The **Subtypes** selector in Actions Fast Filters was redesigned to clearly show **Type → Subtype** relationships (per the new UX):

- Subtypes visually grouped under their parent Action Type.
- Multi-select across types and subtypes still works.
- No change to backend filtering logic.

Business impact:

- Users understand exactly which subtypes belong to which types when filtering.
 - Reduces mis-filters and speeds up building correct saved filters.
-

WIFOX-543 - “Completed” column in Actions table on Client card

The **Actions** table inside the client card now includes a **“Completed”** column, showing whether each action is done or not.

Business impact:

- Account managers can quickly see which actions are still open vs closed for a client.
 - Easier to ensure no important tasks are left unfinished.
-

WIFOX-573 - Make Comments required for selected Actions

Certain action types can now require a **Comment** when being created or completed (per configuration). If an action type is marked as “comment required”, users cannot save it without filling the comment field.

Business impact:

- Ensures key actions always have enough context in the history.
 - Improves quality of follow-up and auditability for important processes.
-

5. Popovers and navigation: smoother UX in CRM

WIFOX-571 - Wider, readable popovers for long text (e.g. action descriptions)

Popovers/tooltip previews (like long action descriptions) now expand **horizontally** up to a sensible max width, instead of becoming extremely tall and narrow. Text wraps nicely and handles long words/URLs.

Business impact:

- Long descriptions are easier to read without scrolling a tiny box.
 - Less friction when reviewing details directly from tables.
-

WIFOX-572 - Redirect each user to their last visited page after login

After login, CRM now redirects each user to their **own last visited page**, stored per user in local storage (`wbcs:{email}:lastVisitedPath`), if it's still valid and accessible. If not, they go to the default start page.

Business impact:

- Users return straight to where they left off (clients list, specific client, requests, etc.).
 - Saves time and clicks at the start of every session.
-

6. Configuration cleanup: labels & employee emails

WIFOX-285 - Remove “Label” from UI forms and auto-generate it in backend

For many configurable entities (action types, buckets, client/request statuses, desks, banks, fee groups, transaction statuses/subtypes, etc.):

- **Label** is no longer entered in create forms; only **Name** is managed by business users.
- In edit forms, Label is still visible but **read-only**.
- Backend automatically generates a unique `label` from Name (same logic as clients' custom fields) and keeps it stable on edits.

Business impact:

- Business users stop dealing with technical IDs and “label” errors.
 - Integrations keep stable identifiers even if visible names change.
-

WIFOX-287 & WIFOX-289 - Safe email change for employees (with impact review and audit)

Together these tasks:

- Analysed all impacts of changing an **employee email** (auth, analytics, permissions, audit, notifications, integrations).
- Implemented safe email change in the **Employee edit** form:
 - Email can now be updated with validation (format + uniqueness).
 - Active sessions, login, password reset, and analytics behavior were defined and handled as approved.
 - Every change is logged with old email, new email, who changed it, and when.

Business impact:

- HR and admins can correct or change employee emails without creating new accounts.
- System remains secure and auditable; analytics continues to make sense over time.

Release 1.20.0

1. ☐ CRM & Table Usability Improvements

WIFOX-680 - Add Columns Customization Feature to Orders Table

Users can now customize which columns are visible in the Trading MS Orders table, improving workflow flexibility and personalizing the CRM experience.

Business impact:

- Teams can tailor their workspace for faster access to relevant data, boosting productivity and satisfaction.

WIFOX-600 - Clients: Add “State” column + filter/sort/customize + form options

A new “State” column (live/demo) has been added to the Clients table and forms, with full support for sorting, filtering, and column customization.

Business impact:

- Makes it easier to segment, filter, and manage clients, supporting better decision-making and targeted actions.

WIFOX-597 - Requests: Track last message timestamps from Client/Manager + show in table

The Requests table now displays when the client or manager last sent a message, with sorting, filtering, and column customization.

Business impact:

- Teams gain better visibility into communication history, helping prioritize follow-ups and improve client service.

WIFOX-604 - [Settings][Actions] Fix missing scroll inside large blocks

Each action block in Settings now has its own scroll, preventing UI glitches and making large lists easier to navigate.

Business impact:

- Users can efficiently manage and review long lists without losing context or experiencing layout issues.

WIFOX-609 - Statuses inside table should be without paddings

Table status indicators are now more compact, improving readability and saving space.

Business impact:

- Cleaner tables mean faster scanning and less visual clutter for users.

WIFOX-608 - Set default search input width for components with fast filters

All search inputs across modules now have a consistent width, ensuring a unified look and feel.

Business impact:

- Consistent UI elements reduce confusion and create a more professional, user-friendly interface.

WIFOX-58 - FastFilters Component Refactoring & Unification

The FastFilters component has been refactored into a shared, reusable module, reducing code duplication and ensuring consistent filtering behavior across the platform.

Business impact:

- Faster feature development, easier maintenance, and a more reliable filtering experience for all users.
-

2. Communication & Collaboration

WIFOX-583 - Requests/Tickets: Implement Paste & Drag-and-Drop Image Upload in Conversations

Users can now paste or drag-and-drop images directly into CRM Requests and Trading Tickets conversations.

Business impact:

- Richer, more efficient communication between teams and clients, leading to quicker resolutions and better support.
-

3. Access & Security

WIFOX-521 - Replace silent redirect with explicit “Access denied” state for entities

When users lack permission to access an entity, they now see a clear “Access denied” message instead of a silent redirect.

Business impact:

- Reduces confusion, improves transparency, and helps users understand access limitations instantly.

WIFOX-421 - IP restrictions for API tokens are working incorrectly

IP addresses for API tokens are now parsed and displayed correctly, ensuring security policies are

enforced as intended.

Business impact:

- Strengthens security and compliance by making sure only authorized IPs can access sensitive APIs.
-

4. Notifications & System Feedback

WIFOX-624 - Notify about Margin Call

The system now sends notifications about margin calls to both the trading area and the assigned manager in Core CRM.

Business impact:

- Ensures timely awareness and action on margin calls, reducing risk and improving client safety.
-

5. Performance & Technical Enhancements

WIFOX-613 - Optimize Table

Table rendering performance has been improved, reducing blank areas during scrolling and making the UI more responsive.

Business impact:

- Smoother user experience and less frustration when working with large datasets.

WIFOX-710 - Configurations of symbols are updating incorrectly on update (on one step before)

A bug affecting the update of symbol configurations has been fixed, ensuring changes are applied correctly and immediately.

Business impact:

- Reduces operational errors and ensures that configuration changes take effect as expected.
-

6. Transaction Accuracy

WIFOX-445 - [Transactions] First transaction date isn't adding

The system now correctly records the date of a client's first transaction.

Business impact:

- Improves financial tracking and reporting accuracy, supporting compliance and better analytics.