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WTS - Trading Core

Release terminal v1.1.0

Release terminal v1.1.0

Release window (by commit dates): 2025-12-12 → 2026-01-14

Scope: Wifox / Tradersroom / DevTerminal + Client Area/Dashboard/UI fixes

Main themes: mobile terminal UX, branding customization, margin/quantity correctness, forms & validation polish, symbol management fixes, CI/infra tweaks

1) Executive summary

This release is mostly a **stabilization + UX polish** drop with a couple of high-impact correctness fixes:

- **Trading / Orders correctness**
 - Fixed multiple issues around **staticUsedMargin**, **fulfilled/filled quantity units**, and **margin quantity multiplication**, preventing corrupted order quantities and wrong margin behavior.
 - **Mobile trading terminal UX**
 - Several targeted improvements to mobile charts (padding, indicators text sizing, moving Y-axis price rendering, removing volume numbers).
 - **Branding / UI customization**
 - Added/updated **Client Area & Trading Terminal branding customization**.
 - **General UI/CRM fixes**
 - A batch of UI bugs across Dashboard, Deposits/Withdrawals, Trading Ideas, Tickets sorting, printing pages, etc.
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2) Changes

Key changes

- **Branding**
 - `WIBR-881` — Client Area & Trading Terminal Branding Customization
- **Mobile terminal / chart UX**
 - `WIBR-865` — Chart: remove right padding for mobile view
 - `WIBR-870` — Move Y-axis prices for mobile into chart rendering
 - `WIBR-855` — Remove volume numbers for mobile
 - `WIFOX-110` — Fix: indicators text still larger than graphs (mobile chart)

- **Symbols**

- WIBR-874 — Add symbol name inside “Add symbol” popup
- WIBR-858 — Fix: inactive symbol shown in add symbol tab

- **Margin / calculations**

- WIBR-852 — Remove multiplying by marginRatio for pip price & PnL calculation
- WIBR-859 — Fix marginRatio (leverage) display in account info popup and buy/sell popup
- WIBR-871 — Fix incorrect calculation in close order popup
- WIFOX-134 — Fix: static margin not added to open order

- **Terminal**

- fix/WIFOX-157 — DevTerminal: staticUsedMargin issue affecting fulfilledQuantity of original order
- A (temporary) revert commit: “revert artifact changes”
- Detailed fix commit describing two critical bugs:
 1. order-service: filled_quantity was set **in lots instead of units** when updating fully-filled orders
 2. margin-call-service: removed **double multiplication** by marginQuantity (since order-service already returns units)

- **Ms.Trading. CRM**

- ◦ BD-91 — Clients/Orders: client must be preselected and selection disabled
- BD-120 — Fix: symbol configuration import translation
- WICORE-1436 — Remove non-nullable rule for margin quantity param in orders requests
- Environments / docker / build
 - ◦ WICORE-1427 — Add/actualize templates of environments for all services
 - WICORE-1414 — Docker builds optimization
- UI/terminal-related shared changes
 - WIBR-859 — Same leverage/marginRatio popup fix merged here too
 - WIBR-788_symbols_conf_fix — Add missing configuration
 - WIBR-843 — Fix incorrect symbols name and label
 - WICORE-1364 — Check markup of weekends in Trading MS
 - WICORE-113 — Remove blur if less than 15 items?

- **Client Area. (Personal area)**

- Branding / shared
 - WIBR-881 — Branding customization (again, included here)
Signup/auth/token
 - WIFOX-130 — Import signup not working due to previous autologin fix
 - WICORE-1401 — Issues with token in signup API method

- UI / layout / spacing

- WIFOX-114 — Internal dropdown overflow parent input
- WIFOX-113 — Add 16px padding; buttons/text too close to screen edge
- WIBR-880 — Dashboard: inappropriate PWA button behavior
- BD-71 — Magnifying glass icon reversed
- BD-115 — Minor color issue of hold plug
- BD-116 / BD-37 / BD-143 / BD-73 — Validation improvements (profile form weird validation, IBAN validation, etc.)

- [BD-72](#) — Notifications affecting printed page
- [BD-65](#) / [BD-67](#) — Deposit UI issues (expiry fields visibility when invalid; cursor position)
- [BD-66](#) / [BD-76](#) — Table/scrolling/layout issues
- [BD-74](#) / [BD-78?](#) (you have “Detailed idea view borders”) — Trading Ideas borders too wide
- [BD-27](#) — Fix dates mess in Trading Ideas
- [BD-39](#) — Incorrect sorting in tickets after creation
- [BD-36](#) + [bugfix/BD-36](#) — Fix build + related behavior (do not show statistics entity if no price / 0.00)
- [WIBR-875](#) — Bridge Pay: add test environment flow
- [BD-180](#) — Fix unit tests

Release 1.2.0

Release Notes — Clean Commit Summary

☐ MS. Trading — release-1.16.1

Features

- **CRM Trading:** Symbol import script now supports two modes: *full replace* and *insert new only*
- **Trading Orders:** Allow changing order executed day (removed unnecessary field mapping that caused issues)

Fixes & Improvements

- Fixed container build errors
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⚙ Trading Terminal Backend — release-1.2.0

Features

- **Trading Orders:**
 - Added `executedAt` field to order update API
 - UI updated with datetime input for order execution date
- **Quotes Service (MT5):**
 - Updated symbols list for current broker provider
 - Added provider-available symbols list

Fixes

- Fixed missing prices for some symbols in Terminal
 - Removed problematic mapping logic when changing order executed day
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☐ Trading Terminal Frontend — release-1.2.0

Features & UX Improvements

- Chart indicators limitation implemented

- Mobile scroll issue fixed in Trading Terminal
- RTL / LTR audit and layout fixes for Client Area
- TP/SL warning now disappears after input value change

Fixes

- Proper handling of error responses from Risk Service (including `NEGATIVE_AVAILABLE_BALANCE`)
 - Fixed symbol search by name and partial matches
 - Fixed container build errors
 - Closed orders now correctly display updated executed date in reports
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☐ Traders Room — release-2.1.0

Features & Enhancements

- Relaxed validation and improved formatting in import forms (Fast Registration)
- Branding customization for Client Area & Trading Terminal
- PWA customization fixes
- Full backend unit test coverage for Facade (Resolvers & API)
- Backend test coverage reporting implemented

Fixes

- Open API authentication fixed
- RTL / LTR layout fixes for Client Area
- Pagination double-arrow issue fixed
- 3DS payments issue fixed (CSP blocking)
- Image upload issue fixed on iPhone

Release 1.2.0

Release Summary Report

Release Version: MS Trading & Terminal – January 2026

Components: MS Trading, Trading Terminal Backend, Trading Terminal Frontend, Traders Room

Release Date: January 2026

Generated: 2026-01-26

Executive Summary

This release delivers a set of **functional enhancements, stability fixes, and UX improvements** across Trading services, Trading Terminal (backend & frontend), and Traders Room.

The main focus areas include **order execution date flexibility, symbol management, frontend usability, branding,** and **platform reliability backed by increased test coverage.**

Release Highlights

New Features & Capabilities

- **WIFOX-334** – CRM Trading: Symbol import script enhanced to support two modes: *full replace* and *insert new only*
 - **WIFOX-266** – Trading Orders: Allow changing order executed day
 - **WIFOX-266** – Trading Terminal Backend: Added `executedAt` field to order update API
 - **WIFOX-266** – Trading Terminal Backend: UI updated with datetime input for order execution date
 - **Quotes Service** – MT5: Updated symbols list for the current broker provider
 - **Quotes Service** – Added list of symbols available per provider
 - **WIFOX-111** – Trading Terminal Frontend: Chart indicators limitation implemented
 - **WIFOX-267** – Trading Terminal Frontend: TP/SL warning disappears after input value change
 - **WIFOX-322** – Traders Room: Relax validation and improve formatting in import forms (Fast Registration)
 - **WIBR-881** – Traders Room: Client Area & Trading Terminal branding customization
 - **WIFOX-2** – Achieve full unit test coverage for Facade (Resolvers & API)
 - **WIFOX-1** – Implement backend test coverage reporting for Facade
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Bug Fixes & Corrections

- **WIFOX-359** – Fix container build errors
 - **WIFOX-317** – Trading Terminal: Fix missing prices for some symbols
 - **WIFOX-269** – Trading Terminal Frontend: Proper handling of Risk Service error responses, including `NEGATIVE_AVAILABLE_BALANCE`
 - **WIFOX-257** – Trading Terminal Frontend: Fix symbol search by name and partial matches
 - **WIFOX-370** – Trading: Closed orders do not display updated executed date in reports
 - **WIFOX-274** – Traders Room: Fix Open API authentication
 - **BD-253** – Fix pagination double-arrow issue
 - **WIFOX-195** – Fix 3DS payments not working due to CSP blocking
 - **BD-198** – Fix image upload issue on iPhone
 - **WIFOX-125121** – Fix Wifox PWA customization issues
 - **WIFOX-275** – Trading Terminal Frontend: Fix scroll issues on mobile
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Improvements & Enhancements

- **WIFOX-266** – Removed unnecessary field mapping when updating order execution date to improve stability
- **WIFOX-263** – RTL / LTR audit and layout fixes for Client Area
- **WIFOX-269** – Improved frontend resilience to backend error responses
- **WIFOX-322** – Improved validation UX and data formatting in Traders Room import flows
- **WIFOX-359** – Improved build reliability across services through container fixes

Release Terminal release-2.1.2

Release Summary Report

Release Version: Trading Platform – release-2.1.2 / release-1.17.0

Components: Terminal Backend, Terminal Frontend, MS Trading, Traders Room

Release Date: February 4 2026

Generated: 2026-02-04

Executive Summary

This release delivers **functional enhancements, financial correctness fixes, and UX improvements** across the Trading Platform.

The primary focus areas include **order editing capabilities, margin handling stability, advanced filtering and sorting, report accuracy, and client-facing UX improvements** across Terminal, Traders Room, and MS Trading.

Release Highlights

New Features & Capabilities

- **WIFOX-429** - Terminal Backend:
Added new Orders filters (`utcExecutedAt` , `updatedAt`) and sorting by `createdAt` , `updatedAt` , `utcExecutedAt`
- **WIFOX-313** - Trading / Terminal Backend:
Order Edit now allows changing **commission** for open orders

- **WIFOX-334** – MS Trading (CRM):
Symbol import script enhanced to support **full replace** and **insert new only** modes
 - **WIFOX-427** – MS Trading:
Added **Created Date** and **Execution Date & Time** columns to Orders table
 - **WIFOX-348** – Terminal Frontend:
Removed commission from open orders view and moved it into final PnL
 - **WIFOX-282** – MS Trading / Traders Room:
Client Activity Logs added to Sessions tab (Client + Manager actions)
 - **WIFOX-322** – Traders Room:
Relaxed validation and improved formatting in Import Forms (Fast Registration)
 - **WIBR-881** – Traders Room / Terminal:
Client Area & Trading Terminal branding customization
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Bug Fixes & Corrections

- **WIFOX-431** – Terminal Backend:
Fixed incorrect cross-rate handling for JPY and margin conversion to user currency
- **WIFOX-447** – Terminal Backend:
Fixed used margin not being released after closing an order when volume was changed
- **WIFOX-452** – Terminal Backend:
Added cleanup script for orphaned positions and releasing stuck used margin
- **WIFOX-424** – MS Trading:
Fixed Swap Long/Short update not working for open orders
- **WIFOX-425** – MS Trading:
Fixed incorrect PnL values displayed in open orders list
- **WIFOX-426** – MS Trading:
Fixed empty execution date in Orders table
- **WIFOX-359** – Platform:
Fixed container build errors
- **WIFOX-317** – Terminal Backend:
Fixed missing prices for some symbols
- **WIFOX-370** – Terminal Frontend:
Fixed closed orders not displaying updated execution date in reports
- **WIFOX-269** – Terminal Frontend:
Fixed handling of Risk Service error responses, including `NEGATIVE_AVAILABLE_BALANCE`
- **WIFOX-257** – Terminal Frontend:
Fixed symbol search by name and partial matches
- **WIFOX-275** – Terminal Frontend:
Fixed scrolling issues on mobile
- **WIFOX-402** – Traders Room:
Fixed scrollbar adjacency issue in symbols table
- **WIFOX-403** – Traders Room:
Fixed Trading Ideas issues (symbol identifier handling)

- **WIFOX-274** - Traders Room:
Fixed Open API authentication
 - **BD-198** - Traders Room:
Fixed image upload issue on iPhone
 - **BD-253** - Traders Room:
Fixed pagination double-arrow issue
 - **BD-277** - Traders Room:
Fixed invalid ticket date on mobile
 - **WIFOX-195** - Traders Room:
Fixed 3DS payments blocked by CSP
 - **WIFOX-125121** - Traders Room:
Fixed PWA customization issues
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Improvements & Enhancements

- **WIFOX-266** - MS Trading / Terminal:
Simplified order execution date update logic by removing problematic field mappings
- **WIFOX-452** - Terminal Backend:
Improved financial consistency by automatically cleaning orphaned positions
- **WIFOX-263** - Traders Room / Terminal Frontend:
RTL / LTR audit and layout fixes for Client Area
- **WIFOX-111** - Terminal Frontend:
Chart indicators limitation improvements
- **WIFOX-1** - Traders Room:
Backend test coverage reporting implemented (Facade)
- **WIFOX-2** - Traders Room:
Full unit test coverage achieved for Facade (Resolvers & API)

Release 2.3.0

1. Client oversight & audit trail

WIFOX-282 - Unified Client Activity Log in Sessions Tab

The **Sessions** tab in the client card now shows a unified activity log with events from CRM, Tradersroom, and Trading Terminal, covering both **client actions** (logins, navigation, deposits/withdrawals, trading, profile changes, tickets, etc.) and **manager actions** on that client (views, edits, created/updated entities, bulk operations). Logs are filterable by actor type, source app, and event type, with full timestamps and metadata, while excluding sensitive payloads.

Business impact:

- Gives support, risk, and compliance a single place to see “who did what and when” for any client.
 - Speeds up investigations and dispute resolution and improves overall auditability.
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2. Trading tickets & verification flows

WIFOX-524 - New “Waiting for client” ticket status in Trading area

The Trading area ticketing flow now supports an additional **“Waiting for client”** status. Managers can mark tickets accordingly, and clients see this state in their UI.

Business impact:

- Clarifies whether the next move is on the client or on support.
- Reduces confusion and back-and-forth in trading-related support cases.

WIFOX-456 - “Feature is unavailable” modals for Withdrawal & Close Order

When a user’s verification status is **Rejected / Pending / Init**, attempts to **withdraw** funds or **close an order** now show a clear “Feature is unavailable” modal with a **“Verify your identity now”** CTA, reusing the existing “Trading is unavailable” pattern. Actions are blocked until verification is complete.

Business impact:

- Makes compliance-driven restrictions explicit and consistent across trading and withdrawals.
 - Redirects users into verification instead of failing silently or with unclear errors.
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3. Order placement: volume, min volume, TP/SL and profit

WIFOX-515 - Volume input stepper (+/-) based on lot size

The **Volume** field in the New Order form now has + / - **steppers** with step size derived from instrument **lot size**:

- lot size → step
- lot size → step
- lot size → step

Value is clamped at zero and correctly rounded.

Business impact:

- Faster and less error-prone volume selection aligned with instrument configuration.
- Reduces mis-entries for very small or very large lots.

WIFOX-507 - Min volume processing & enforcement end-to-end

The **minVolume** per instrument is now:

- properly imported and stored in Trading MS,
- exposed to the terminal, and
- used in the UI as default volume and **hard lower bound** (UI prevents going below; backend also rejects too-small volumes).

Business impact:

- Prevents orders below allowed minimum volume, avoiding rejects and confusion.
- Ensures trading behavior aligns with configured risk and product rules.

WIFOX-522 & WIFOX-526 - Creating orders without TP/SL works reliably

Two related issues were fixed in the New Order form:

- **WIFOX-522:** Clearing TP/SL fields could cause a **NaN error**, blocking order creation even though TP/SL is optional.
- **WIFOX-526:** After filling TP/SL and then deleting them, the form sometimes still refused to submit.

Business impact:

- Traders can open positions without TP/SL as intended, without hitting hidden validation bugs.
- Reduces friction and failed order attempts due to optional-field edge cases.

WIFOX-482 - Correct profit calculation for TP/SL on SELL orders

The profit preview in TP/SL inputs is now correctly calculated for **SELL** orders as well.

Business impact:

- Traders see accurate expected profit/loss when placing protective levels on short positions.
- Reduces risk of wrong expectations and complaints around PnL behavior.

WIFOX-478 - Hide TP/SL fields when not used

Take Profit and Stop Loss values are now hidden in lists/places where they don't exist for a given order.

Business impact:

- Cleaner order and positions views with less "empty" or misleading data.
 - Easier visual scanning of which orders actually have protection set.
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4. Trading UX, clarity and chart tools

WIFOX-459 - Instrument information in Buy/Sell popup

The Buy/Sell popup now shows rich **symbol information** (e.g. digits, lot size, swap long/short, commission, calculation type, and short analytics such as performance over recent periods) according to the new design.

Business impact:

- Traders can understand contract specs and costs directly from the order screen.
- Supports more informed decisions and reduces the need to cross-check external specs.

WIFOX-484 - Training Trade: chart drawing tools

In **Training Trade** mode, users can now draw directly on charts (lines, annotations etc.), using amCharts / a canvas overlay, with a simple enable/disable control and clear/reset options.

Business impact:

- Greatly improves educational sessions, coaching, and internal training around trading strategies.
- Enables visual explanation of setups without affecting live trading logic.

WIFOX-467 - Remove “NaN” while chart is loading

While price graphs are loading, temporary **NaN** values are no longer shown — the UI now waits for valid data.

Business impact:

- Cleaner, more professional first impression for traders.
- Avoids confusion about system correctness when charts initialize.

WIFOX-472 - Fix price-alert notification text & overflow

Notifications about price levels no longer overflow their containers and now display numbers consistent with the **current price**.

Business impact:

- Alerts are readable and trustworthy, helping traders react correctly to price movements.

WIFOX-471 - Align symbol name & description in terminal

Instrument names and descriptions in the terminal header have been realigned as per design (e.g. description below or left-aligned), reducing the need for horizontal scrolling.

Business impact:

- Symbol details remain visible and readable, even on narrow layouts.
- Less visual noise, easier instrument recognition.

WIFOX-477 - Trading language & terminology consistency

Several text and visual improvements were made in the trading UI:

- **“Volume”** is now used consistently instead of “Quantity”.
- **Open price** of orders is visible directly in the order list.
- Currency symbols (e.g. EUR) are now used consistently.

- TP/SL values are visually aligned with other numbers.

Business impact:

- Reduces confusion for traders due to inconsistent terms or missing key data.
- Makes the platform feel more “native” to experienced FX/CFD users.

WIFOX-474 - Don't show quotes if there is no stream

If no live data stream is available for a symbol, quotes are no longer shown as if they were active.

Business impact:

- Prevents traders from acting on stale or non-existent price feeds.
 - Supports safer trading operations and clearer monitoring of connectivity issues.
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5. Trading area usability

WIFOX-509 - One-click “Copy account number” in trading area

In both trading area layouts, a **copy** control next to the account number now copies the full account number to the clipboard and shows a brief “copied” confirmation.

Business impact:

- Speeds up communication with support and internal teams (sharing account IDs).
 - Reduces copy-paste mistakes when searching for an account in CRM or external tools.
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6. Requests & Tickets: clearer communication

WIFOX-516 - Requests / Tickets: preserve line breaks and paragraphs in messages

In **CRM → Requests → Messages** and in **Trading Area Tickets**, message fields now fully support **multi-line text**:

- Pressing Enter adds a new line, and pasted templates keep paragraphs and empty lines.
- Line breaks are stored in the backend and rendered correctly in both CRM and Trading UIs (no more “everything in one line”).

- Formatting is preserved cross-system: a message written in CRM appears identically formatted in Trading Area, and vice versa.

Business impact:

- Agents can paste and use existing multi-paragraph templates without losing structure.
 - Client conversations become easier to read and understand, improving support quality and reducing miscommunication.
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7. Bridge Pay refunds / cancellations

WIFOX-362 - Bridge Pay: cancel transaction on getback callbacks

A new **Bridge Pay getback handler** was implemented in the payments backend (new `getback.ts` controller and route). When Bridge Pay sends a **getback** event (for example, user cancels a 3-DS payment or a refund/chargeback-type event is triggered), the corresponding CRM transaction is now safely moved to the **Canceled** status, with idempotent logic and proper callback validation.

Business impact:

- CRM now correctly reflects payment cancellations and getbacks from Bridge Pay, instead of leaving such transactions in an inconsistent state.
- Reduces manual reconciliation and “mismatched status” investigations between the provider and CRM.
- Safer integration: callbacks are validated and processed idempotently, so duplicate or invalid events don’t corrupt transaction history.

Release 2.3.4

WIFOX-515 - Volume step controls aligned with instrument lot size

The **Volume** field in the New Order form now has + / - **step controls** whose step size automatically follows the **lot size** of the instrument (e.g. 0.01, 0.1 or 1). Volume cannot go below zero and values are correctly rounded.

Business impact:

- Traders can adjust order volume much faster and with fewer manual edits, especially on very small or very large contract sizes.
 - Reduces input mistakes and rejected orders caused by incorrect volume values, aligning order entry strictly with instrument configuration.
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WIFOX-588 - Trading Terminal: persist selected pairs tabs across re-login

In **Trading Area** → **Trading Terminal**, the platform now **remembers the set of opened trading pair tabs, their order, and (optionally) the active tab** using per-user local storage.

- On first login, a default set of tabs is opened (`EUR/USD`, `USD/ILS`, `BTC/USD`, `GOLD`, `BRENT`) and immediately saved.
- Any later changes (adding/removing pairs, reordering, changing the active tab) are persisted.
- After manual logout or token expiration, the terminal restores the same configuration on the next login, per user and per browser profile.

Business impact:

- Active traders no longer need to rebuild their working set of instruments after each login, saving time on every session.
- Provides a more “personalized terminal” experience while remaining safe (invalid/removed symbols are ignored and replaced by defaults when needed).

Release 2.4.0

1. Trading Area: smoother onboarding and account handling

WIFOX-585 - Trader Declaration: "Client ID number" field fixed

The **Client ID number** field in Trading Area → Accounts → Trader Declaration now accepts and shows user input normally, keeps the value in form state and submits it correctly with the declaration.

Business impact:

- Trader declarations are no longer blocked by a "dead" field.
- Reduces support involvement during KYC / onboarding.

WIFOX-511 - Account selector: smarter ID display

The Trading Area account selector now shows:

- **client.uid** when the client has **exactly one** trading account;
- **asset.uid** when there are **multiple** accounts (as before), so they remain distinguishable. If client.uid is missing, the selector safely falls back to asset.uid.

Business impact:

- Faster client identification in the common single-account case.
 - No loss of clarity when a client has several accounts.
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2. Trading Terminal: saved workspace and better charts

WIFOX-588 - Trading Terminal: remember selected pairs and order across logins

The Trading Terminal now **persists the list and order of opened trading pair tabs** (and the active tab) per user in local storage.

- On first login, a default set is opened: EUR/USD, USD/ILS, BTC/USD, GOLD, BRENT.
- Any changes (add/close/reorder/switch active) are saved.
- After logout or token expiration, the same configuration is restored on the next login.

Business impact:

- Active traders no longer rebuild their workspace each session.
- The terminal feels personalised and consistent between sessions.

WIFOX-515 - New Order: volume +/- controls based on lot size

In the New Order form, the **Volume** field now has “- / +” buttons with a step size derived from the instrument’s **lot size** (e.g. 0.01, 0.1, 1). Values are rounded correctly and never go below zero; manual typing still works.

Business impact:

- Faster, less error-prone volume selection, especially for very small or large lots.
- Fewer rejected orders due to invalid or awkward volume inputs.

WIFOX-569 - Default chart zoom set closer (1-hour view)

Trading charts are now **zoomed in by default** (1-hour view), showing price action in a closer, more relevant window.

Business impact:

- Traders see actionable, recent price movement immediately.
- Less manual zooming on every symbol.

WIFOX-568 - Remove open-position pointer from chart

The special pointer marker for the open position on the chart has been **removed**.

Business impact:

- Cleaner charts with less visual noise.
- Focus stays on price and user-defined levels instead of an extra marker that traders didn’t find useful.

WIFOX-579 - Simplified UI: removed unnecessary accordion in Trading conditions section

A redundant accordion component in the Trading conditions context has been removed, keeping the interface flatter and more direct.

Business impact:

- Less clicking and “hidden” content when working with pair info.
 - Cleaner, more straightforward layout for support teams.
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3. Requests & Tickets: real-time, rich conversations

WIFOX-544 - Requests/Tickets: near-real-time message updates (“online” mode)

Message polling in **CRM Requests → Messages** and **Trading Area Tickets → Messages** has been tightened to a near real-time interval while a conversation is open (around 1-2 seconds), with optimisations to pause/slow polling when the tab or conversation is not active. Sending a message also triggers an immediate refresh.

Business impact:

- Conversations feel closer to chat in real time, not like an email thread.
- Faster back-and-forth between clients and support without manual refresh.

WIFOX-542 - Requests/Tickets: clickable links in messages (CRM + Trading Area)

URLs inside request/ticket messages are now automatically rendered as **clickable links** in both CRM and Trading Area, opening in a new tab with safe settings.

Business impact:

- Agents and clients can follow shared links (docs, KYC pages, references) directly from the conversation.
- Less copy-paste and fewer mistakes opening referenced resources.

WIFOX-584 - Tickets/Requests: remove “only letters” validation for Name/Subject

The **Name/Subject** field in Tickets (Trading Area) and Requests (CRM) no longer enforces “letters-only” validation. Any characters are allowed (digits, symbols, mixed text such as “KYC 2.0 – urgent #15”).

Business impact:

- Users can describe cases naturally (IDs, ticket numbers, versions, etc.).
- Fewer blocked forms and no need to invent artificial subject lines.

4. Client Area UX & internationalisation

WIFOX-263 - RTL/LTR audit and fixes for Client Area

The main Client Area (Tradersroom) views have been reviewed and adjusted to work correctly in both **LTR and RTL** languages, including dashboards, markets, FAQ, history, tickets, deposits/withdrawals, forms, profile, documents, PWA modal, OAuth pages and key modals/drawers. Alignments, directional icons, paddings, table behavior and animation directions have been fixed for RTL where needed.

Business impact:

- Proper experience for right-to-left languages (Arabic, Hebrew, etc.), on par with LTR.
- Reduces layout issues and confusion for international clients.

WIFOX-190 - Mobile/tablet form paddings adjusted

Form paddings in the Client Area on **mobile and tablet** were updated to match approved design values (different vertical spacing for $\leq 768\text{px}$ and $\geq 769\text{px}$), including removal of an extra padding block.

Business impact:

- Forms look and feel more balanced on phones and tablets.
 - Less unnecessary scrolling, clearer focus on primary actions.
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5. Trading UX micro-improvements

WIFOX-569 - Closer default chart view (1 hour)

(Already listed above under trading terminal) - charts now open in a closer timeframe, making recent data easier to analyse.

Release 2.5.0

1. ☑ Smarter trading experience: profit, commission, and order management

WIFOX-648 - Profit column now standardized and always in EUR

Orders tables in CRM and Terminal now display a unified “Profit” column, always showing values with an “EUR” suffix and ensuring all calculations are in EUR. This eliminates confusion and ensures financial clarity across all trading reports.

Business impact:

- Users and admins get consistent, transparent profit reporting in EUR, reducing errors and misunderstandings.

WIFOX-480 - Commission handling: real-time, in user currency

Commissions are now calculated as part of order PNL in real time, always in the user’s currency, and only applied to the balance after closing an order.

Business impact:

- Accurate, real-time commission tracking and improved transparency for users and managers.

WIFOX-586 - Edit closed order PNL updates user balance

Editing the PNL of a closed order in CRM/Terminal now correctly updates the user’s balance, ensuring financial records stay accurate.

Business impact:

- Admins can confidently adjust closed orders, knowing user balances will always reflect the latest changes.

WIFOX-483 - Clone closed orders with balance return

A new “Clone” button for closed orders lets users quickly reopen positions, with the option to delete the original and return its PNL to the client’s balance.

Business impact:

- Streamlines order management and gives users more flexibility in managing their trading history.
-

2. 📁 Enhanced communication: image uploads in chat

WIFOX-583 - Paste & drag-and-drop image upload in CRM and Trading chats

Users can now paste or drag-and-drop images directly into CRM Requests and Trading Tickets conversations, with previews, validation, and error handling.

Business impact:

- Faster, richer communication between teams and clients, improving support and collaboration.
-

3. 📁 Stronger risk controls and validation

WIFOX-512 - Risk Service: enforce minimum volume even if not set

The risk service now validates minimum order volumes, even if not explicitly configured, ensuring no position is opened below 1 EUR.

Business impact:

- Prevents accidental micro-positions and enforces trading discipline.

WIFOX-633 - Manual volume input strictly respects min/step precision

Manual volume entries are now normalized to the correct step and decimal precision, preventing invalid order sizes.

Business impact:

- Reduces trading errors and ensures compliance with platform rules.

WIFOX-589 - Terminal: fixed inability to type values into volume field

Users can now type values directly into the volume field, restoring expected trading behavior.

Business impact:

- Smoother trading experience and fewer user frustrations.
-

4. 📄 Terminal and trading UI improvement

WIFOX-598 - Trading Terminal: close active trading pair tab

Users can now close any trading pair tab, including the active one, for a more flexible and intuitive terminal experience.

Business impact:

- Empowers users to manage their workspace efficiently.

WIFOX-570 - Trading Terminal: default tabs configuration per user

The terminal now remembers each user's opened trading pair tabs and restores them after logout or token expiration, using backend defaults only on first login.

Business impact:

- Personalized, persistent workspace for every user.
-

5. 📄 Smarter trading insights

WIFOX-531 - Trading Ideas: display percentage-based recommendations

Trading Ideas now show percentage-based buy/sell recommendations when available, falling back to legacy labels if not.

Business impact:

- Users get clearer, data-driven trading signals for better decision-making.
-

6. 📄 General improvements and backend enhancements

WIFOX-607 - Terminal: fixed profit display in detailed order view on mobile

Profit values are now displayed consistently and accurately across all views, including mobile.

WIFOX-621 - Pips price frontend: improved decimal precision logic

Pip prices now display with the correct number of decimals based on value size, improving clarity for assets like GOLD.

WIFOX-559 - Orders Service: AI analysis, fixes, and documentation

Orders Service reviewed and improved with AI analysis, bug fixes, and updated documentation in

the Wiki.

WIFOX-514 - Production server: enforce single Node.js instance, no cross-env/Yarn

Production servers now follow stricter deployment rules for reliability and maintainability.

Release 2.6.0

1. 🗂️ Trading Terminal & User Experience Improvements

WIFOX-661 - Improved Trading Terminal and Tab Navigation

The trading terminal and active pairs tabs have been visually refreshed and streamlined for a more intuitive navigation experience.

Business impact:

- Users benefit from a cleaner, more user-friendly interface, making it easier to manage multiple trading pairs and navigate the platform.

WIFOX-660 - Enhanced Symbols List for Faster Trading

The symbols list in the terminal has been updated for better clarity, organization, and usability.

Business impact:

- Traders can find and select trading pairs more quickly, reducing time to action and improving trading efficiency.

WIFOX-659 - Customizable Orders Table with Key Metrics Summary

The orders table now allows users to customize visible columns, view a summary of key metrics, and save their preferences for future sessions.

Business impact:

- Teams can tailor their workspace to focus on the most relevant data, boosting productivity and decision-making.

WIFOX-635 - Role-Based Data Visibility in Trading Table

Column visibility in the trading table is now controlled by user permissions, ensuring only authorized users see sensitive information.

Business impact:

- Supports compliance and data privacy by restricting access to financial details based on user roles.

WIFOX-643 - Faster Symbol Selection and Tab Opening

Selecting a trading pair now instantly opens it in a new or existing tab, streamlining the process

and reducing unnecessary steps.

Business impact:

- Traders can react to market changes faster, improving their ability to capitalize on opportunities.

WIFOX-644 - Simplified Order Placement with Clearer Take Profit/Stop Loss Options

Order placement modals now feature clearer options for setting Take Profit and Stop Loss, making risk management more straightforward.

Business impact:

- Users can place orders with greater confidence and precision, reducing errors and improving trading outcomes.

WIFOX-645 - Clearer Close Order Experience

The close order process now provides clearer visual cues and information, making it easier to confirm and execute order closures.

Business impact:

- Reduces mistakes and support requests by making the close order process more transparent and user-friendly.

WIFOX-646 - Easier Position Modification

The position modification process has been streamlined for clarity and ease of use.

Business impact:

- Users can adjust open positions more confidently, supporting better risk management and trading flexibility.

2. Trading Logic & Backend Reliability

WIFOX-686 - Unified Profit & Loss and Margin Calculations

All P&L and margin calculations are now handled on the backend, ensuring consistency across the platform.

Business impact:

- Provides traders and admins with reliable, accurate financial data, reducing discrepancies and confusion.

WIFOX-674 - Corrected Buy/Sell Price Display

A critical issue where Buy and Sell prices were displayed incorrectly has been fixed.

Business impact:

- Restores trust in platform pricing, prevents financial inconsistencies, and protects users from misleading execution prices.

WIFOX-708 - Improved Error Handling for Orders

Order creation and closure now provide clear error messages when something goes wrong.

Business impact:

- Users receive immediate feedback on failed actions, reducing confusion and unnecessary support requests.
-

3. Proactive Notifications

WIFOX-624 - Margin Call Notifications for Managers and Traders

The system now sends timely notifications about margin calls to both traders and their assigned managers.

Business impact:

- Ensures rapid response to margin calls, reducing risk and improving client safety.

Release 2.7.0

1. 📱 Platform & Trading Experience Improvements

WIFOX-752 - Responsive Trading Terminal Layout and Controls

The trading terminal layout and navigation have been optimized for all devices, with improved chart controls, drawing tools, and a more intuitive mobile experience.

Business impact:

- Users enjoy a seamless trading experience on any device, boosting engagement and reducing friction.

WIFOX-751 - Improved Number Input Usability

Number input fields now handle formatting and caret position more intuitively, especially with thousand separators.

Business impact:

- Reduces user frustration and data entry errors, making financial operations smoother.

WIFOX-769 - Semi-transparent Volume Widget on Charts

Volume Widget under main chart changed to semi-transparent tone in order to not confuse users and make the same alignment with Trading View

WIFOX-772 - Indicators Search Fix

The indicators search field now works correctly, allowing users to find indicators by name.

Business impact:

- Faster access to technical analysis tools, improving trading efficiency.

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-741 - Trading Charts: Only Real Market Data, No Artificial Candles

Charts now display only real market data, collapsing time gaps when data is missing (e.g., weekends, holidays).

Business impact:

- Provides a more accurate and trustworthy view of market activity, supporting better trading decisions.

WIFOX-723 - Restrict Supported Timeframes to Required Set

Only the most relevant chart timeframes are now available, simplifying the user interface.

Business impact:

- Reduces confusion and streamlines the trading workflow.

WIFOX-748 - ClickHouse Guest Mode (Read-Only)

A new guest mode allows read-only access to ClickHouse data.

Business impact:

- Enables secure, controlled data access for analytics and reporting without risking data integrity.
-

2. Backend, Data & Trading Logic

WIFOX-727 - Backend Consolidation: Single Process, No More account-service-spot

Multiple backend services have been merged into a single process, simplifying architecture and maintenance.

Business impact:

- Increases system reliability, reduces operational complexity, and speeds up future development.

WIFOX-747 - Always Up-to-Date Leverage in Buy/Sell Dialogs

Leverage and margin data in Buy/Sell dialogs now refresh automatically while open, ensuring users always see the latest trading conditions.

Business impact:

- Prevents trading errors and surprises by keeping users informed of current trading rules.

WIFOX-703 - Fix Order Edit: Entry Price Now Recalculates PnL and Settlement

Editing an order's entry price now correctly updates both displayed and settled PnL.

Business impact:

- Ensures financial accuracy and trust in trading operations.

WIFOX-561 - Margin Call Service Review and Documentation

Margin Call Service has been reviewed, improved with AI analysis, and fully documented.

Business impact:

- Reduces risk of margin-related issues and supports compliance with clear documentation.
-

3. ☐ CRM & Communication Enhancements

WIFOX-600 - Clients Table: State Column, Filtering, and Customization

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

Business impact:

- Makes it easier to segment and manage clients, supporting better service and compliance.

WIFOX-599 - CRM Requests & Trading Tickets: Always Visible Creation Date

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

Business impact:

- Improves SLA tracking, prioritization, and operational transparency.

WIFOX-739 - Feature Unavailable: Non-Blocking Notification Instead of Modal

When a feature is unavailable, users now see a notification instead of a blocking modal.

Business impact:

- Reduces user frustration and keeps the interface interactive, even when features are restricted.
-

4. ☐ Trading Groups & Filtering

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-722 - Complex Fast Filters on Backend Terminal

Backend now supports advanced filtering logic for terminal data, matching the capabilities of the core system.

Business impact:

- Enables more powerful and precise data analysis for users.
-

5. Financial Operations & Accuracy

WIFOX-792 - Accurate Handling of Small Sums in CRM Accounts

Deposits and withdrawals now correctly handle amounts with cents, ensuring no loss of value.

Business impact:

- Prevents financial discrepancies and supports accurate accounting.

WIFOX-310 - Deposit Requests Pending When Information Is Incomplete

Deposit requests now remain pending if required information is missing, preventing incomplete transactions.

Business impact:

- Reduces operational errors and ensures compliance with KYC and AML requirements.

Release 2.14.0

☐ Trading Terminal & UI Performance

This theme focuses on critical stability fixes for the trading interface and optimizing the frontend to handle professional-grade data volumes.

WIFOX-1047 - Native Scrolling in Core Table Components

We replaced complex virtual scrolling with standard native rendering across the shared table infrastructure in WTCS.

Business impact:

Eliminates rendering glitches and scroll inconsistencies, providing a more stable and predictable interface for managers handling large client lists.

WIFOX-1076 - High-Performance Chart Rendering Optimization

Implemented several rendering optimizations, including candle-only indicator refreshes and mousemove hit-test caching (16ms throttle).

Business impact:

Massively reduces CPU overhead and browser lag during active trading, allowing for a fluid and responsive charting experience even with multiple drawings.

WIFOX-1091 - High-Visibility Chart Drawing Annotations

Increased the default font sizes for drawings and annotations within the terminal charts.

Business impact:

Improves accessibility and professional usability, making technical analysis and price markers easier to read at a glance.

WIFOX-1058 - Orders Table Infinity Scroll Fix

Resolved a technical issue in the Tradersroom that caused the infinite scroll behavior to fail on the Orders table.

Business impact:

Ensures traders can seamlessly browse their entire history without data loading interruptions.

⚙ Trading Logic & Data Integrity

These updates ensure that the underlying trading parameters, market rates, and account balances are accurate and reliable.

WIFOX-1142 - Standardized Default Symbol Metadata

Updated the global CSV seed for default symbols to include explicit timezones, spreads, and normalized lot sizing across all asset classes.

Business impact:

Ensures that all new trading environments ship with a consistent, market-accurate instrument catalog without requiring manual per-symbol setup.

WIFOX-1134 - Restricted View for Swap Accumulations

Implemented a restricted visibility mode for Swap accumulations specifically for the client-side view.

Business impact:

Provides a cleaner, more focused interface for clients by presenting only essential financial data while maintaining full auditing in the backend.

WIFOX-1106 - Asset Scaling for 1000+ Symbols

Upgraded the order management logic to correctly retrieve and display data in environments with over 1,000 active instruments.

Business impact:

Future-proofs the platform for large-scale brokerage operations, allowing for an expanded asset catalog without breaking order retrieval.

WIFOX-1107 - Accurate Monday Rate Change Logic

Updated the rate-change calculation to use the last available trading day instead of a strict 24-hour calendar lookup.

Business impact:

Eliminates confusing "+100% change" errors on Monday mornings by correctly comparing current rates against Friday's close instead of Sunday's gap.

WIFOX-1117 - Predictive Rate Requesting

The frontend now requests the last known rates immediately upon loading while waiting for the next live market tick.

Business impact:

Removes "empty" price states during quiet market periods, ensuring the user always sees the most recent valuation upon login.

WIFOX-1079 - Symbol Configuration Cleanup

Removed obsolete properties like `marginRequirement` and `timezone` from the internal symbol configuration objects.

Business impact:

Reduces technical debt and simplifies the system's data model, leading to faster processing and fewer configuration errors.

WIFOX-1115 - Symbol Catalog Pruning

Successfully removed several redundant asset rows (XZN, XNI, ZRX, XVG).

Business impact:

Maintains a clean and relevant instrument list, ensuring traders are only presented with active,

supported assets.

☐☐ Communication & System Branding

WIFOX-293 - Comprehensive System Email Suite

Completed a full audit and implementation of all required system email templates for clients and managers based on the master specification.

Business impact:

Ensures a professional and consistent brand voice across all automated touchpoints, from onboarding to account security.

Release 2.15.0

☐☐ Trading Terminal & Market Execution

Refining the core trading experience with better precision, reporting, and reliable order management.

- **WIFOX-1155 - Unified Position Modification Logic**

The "Modify Position" interface now mirrors the "New Order" form, providing a consistent experience across Price, Pips, and Profit calculation modes.

Business impact:

Ensures traders have predictable P&L estimates when adjusting targets, reducing execution errors and improving UX parity.

- **WIFOX-1197 - Optimized Order Approval Workflow**

The matching engine now correctly accepts resting limit orders that don't immediately cross the spread and provides accurate error codes for unfilled market orders.

Business impact:

Reduces false rejections of limit orders and provides clear, actionable feedback to clients when liquidity is missing.

- **WIFOX-1148 - Advanced Operational Reporting (XLSX/CSV)**

The trading terminal now supports high-fidelity Excel (.xlsx) and CSV exports with human-readable headers and formatted target levels.

Business impact:

Provides management and clients with professional-grade data exports for tax, audit, and performance analysis.

- **WIFOX-1196 - Precision Price Rendering**

Fixed technical "noise" in instrument prices (e.g., trailing decimals) across the orders table and mobile details view.

Business impact:

Maintains a professional, clean trading interface that matches the exact decimal precision of the market.

- **WIFOX-1133 - Remaining Balance Sorting**

Implemented end-to-end support for sorting orders by their remaining balance in the Socket API and CRM interface.

Business impact:

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

☐☐ Traders Room & Mobile Experience

Enhancing the client-facing portal with responsive design and improved financial visualization.

- **WIFOX-1230 - Mobile-Optimized Transfer History**

Redesigned the transfer history table to prevent horizontal overflow on mobile devices (viewports $\leq 575\text{px}$).

Business impact:

Provides a seamless mobile banking experience where clients can review deposits and withdrawals without awkward scrolling.

- **WIFOX-1156 - Normalized Margin Level Visualization**

Aligned the "Margin Level" display to show as a consistent percentage (Equity/Used Margin) across both the terminal and manager views.

Business impact:

Provides a clearer risk indicator for traders, matching industry standards and preventing confusion with free margin amounts.

- **WIFOX-1195 - Reliable Account Switching**

Fixed a synchronization issue in the account selector that could cause the UI to display stale balance data after switching accounts.

Business impact:

Guarantees that traders always see the live, accurate balance of their currently selected account.

- **WIFOX-1143 - Smart Document Name Handling**

Improved the display logic for long document names in the client portal to prevent layout breaking.

Business impact:

Maintains a professional and organized appearance in the client area, even when handling complex compliance files.

Release 2.16.0

☐☐ Trading Terminal & Order Execution

Core improvements to the trading experience — more accurate pricing, better order feedback, and a cleaner interface for active traders.

WIFOX-1266 - Clearer Per-Tick Profit Guidance in Order Form

The chart order form now displays a redesigned summary row with an intuitive label and on-hover explanation showing exact profit/loss per minimum price move in the account currency.

Business impact:

Helps traders understand their real financial exposure before placing an order, reducing costly misinterpretations.

WIFOX-1277 - Free Margin Displayed in Orders Table Footer

Added a persistent "Free Margin" indicator to the trading table footer, giving traders instant visibility into their available capacity.

Business impact:

Allows traders to assess risk headroom at a glance without navigating to a separate account summary screen.

WIFOX-1253 - Symbol Aliases in Buy/Sell Modal

The instrument selector in the order modal now shows custom symbol aliases alongside system names.

Business impact:

Reduces confusion for traders accustomed to branded or regional instrument names, speeding up order placement.

WIFOX-932 - Real-Time Price Tick Indicator

Added a visual "tick" indicator showing the price delta in the current moment directly on the trading interface.

Business impact:

Gives traders immediate, at-a-glance awareness of price momentum before executing a trade.

WIFOX-1391 - Visible Notifications During Order Confirmation

Fixed a layering issue where success and error messages were hidden behind the close-order confirmation overlay.

Business impact:

Ensures traders always see critical execution feedback, preventing confusion about whether an order was successfully closed.

☐☐ Reporting, History & Data Quality

Ensuring that order history, exports, and live dashboards display clean, accurate, and localized data.

WIFOX-1392 - Localized Order History & Professional Exports

Order history tables no longer show long floating-point "noise." Downloaded CSV/XLSX reports now use column headers translated to the user's selected language.

Business impact:

Delivers professional-grade, client-ready reports suitable for tax filing, auditing, and multi-language operations.

WIFOX-1379 - Stable Real-Time PnL Dashboard

Stabilized the live PnL updates in Traders Room — multiple assets now update seamlessly within a single connection, with consistent numeric formatting and working owner filters.

Business impact:

Provides managers with a reliable, real-time overview of client performance without system lag or data inconsistencies.

WIFOX-1185 - Professional Empty States for Statistics

Redesigned the "no data" view in the Statistics module to provide a clear, branded message instead of a blank or broken screen.

Business impact:

Maintains a professional appearance for new accounts or filtered views where no trading history yet exists.

☐☐ Client Portal & Visual Consistency

Polishing the client-facing experience across desktop and mobile platforms.

WIFOX-977 - Redesigned Transactions View (Desktop & Mobile)

The Transactions section in the Traders Room has been fully redesigned following updated Figma specifications for both desktop and mobile viewports.

Business impact:

Provides a modern, professional financial overview that builds client confidence and matches current design standards.

WIFOX-1255 - Corrected Dark Theme for Trading Ideas

Fixed color inconsistencies in the Trading Ideas section when dark mode is active.

Business impact:

Ensures full visual consistency for clients who prefer dark mode, maintaining brand quality across all themes.

WIFOX-1278 - Correct Buy/Sell Button Colors

Resolved a styling issue where the submit button colors in the Buy/Sell modal did not match the expected design.

Business impact:

Restores clear visual distinction between buy (green) and sell (red) actions, reducing the risk of accidental trades.

WIFOX-1186 - Consistent Section Spacing

Fixed inconsistent paddings between page sections for a cleaner overall layout.

Business impact:

Improves readability and visual professionalism across the entire client-facing interface.

Backend Performance & Infrastructure

Behind-the-scenes optimizations ensuring the platform scales reliably under operational load.

WIFOX-1396 - Optimized Employee Order Allow-List Queries

Resolved a performance bottleneck where employee order list requests triggered expensive, repeated database lookups against the Core Banking assets service.

Business impact:

Dramatically reduces server load during backoffice operations, ensuring fast response times even during peak hours.

WIFOX-1202 - Real-Time CRM-Trading Data Sync via RabbitMQ

Established a reliable message queue between the CRM and Trading services for real-time data synchronization.

Business impact:

Ensures that order and client data updates propagate instantly across systems, eliminating stale data in manager views.

WIFOX-1228 - Additional Market Data Provider

Integrated secondary market data source alongside existing providers.

Business impact:

Increases data redundancy and coverage, reducing the risk of pricing gaps if a single provider experiences an outage.

Release 2.17.0

☐☐ Trading & Market Execution

Refining the core trading experience with better precision, reporting, and reliable order 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.

- **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-1248 - Historical Order Execution Fix**

Resolved an issue where opening an order with a past timestamp would fail to execute correctly in the system.

Business impact:

Ensures that manual back-office adjustments and historical data entries are processed reliably by the trading engine.

- **WIFOX-1400 - Market Session Visibility**

Added a real-time display of instrument working hours directly within the Buy/Sell modal on the frontend.

Business impact:

Reduces trader confusion by clearly showing when a market is open or closed before they attempt to place a trade.

☐☐ CRM & User Experience Overhaul

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

- **WIFOX-1183 - Optimized Data Popovers**

Changed the behavior of information popovers from "hover" to "click" to prevent unnecessary system requests and UI "jumping."

Business impact:

Massively improves interface stability and reduces server load, especially for managers navigating high-density data tables.

- **WIFOX-1419 - Enhanced Symbol Visibility**

Increased the size of the symbol selection modal and ensured full instrument names are visible without truncation.

Business impact:

Speeds up the selection process for staff and reduces the risk of choosing the wrong instrument due to hidden text.

- **WIFOX-1401 - Professional Number Formatting**

Standardized the use of thousands separators (e.g., 10 000 instead of 10000) across all trading tables and tooltips.

Business impact:

Improves data readability and reduces the risk of human error when scanning large financial figures.

- **WIFOX-1184 - Compact Table Layouts**

Streamlined data tables by moving date subtitles to the right and reducing icon sizes for a more professional, high-density view.

Business impact:

Allows managers to see more information on a single screen without excessive scrolling.

- **WIFOX-1186 - Consistent Interface Spacing**

Resolved inconsistent paddings and alignment issues between different sections of the CRM.

Business impact:

Delivers a more polished, professional aesthetic that aligns with modern enterprise software standards.

Security, Roles & Compliance

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

- **WIFOX-1310 - Granular Trading Controls**

Introduced a dedicated "Trading Allowed" toggle within the client management tab, allowing agents to enable or disable trading for specific clients instantly.

Business impact:

Provides immediate risk management capability, allowing staff to halt trading activity for specific accounts without affecting their overall CRM access.

- **WIFOX-1397 - Stable Manager Access Context**

Ensured that the Orders table only loads after the manager's access permissions are fully verified, preventing "infinite loading" or incorrect empty states.

Business impact:

Guarantees that staff always see the exact data they are authorized to view, improving platform reliability and security.

- **WIFOX-1415 - Unified Risk Metrics**

Resolved a discrepancy where "Free Margin" values differed between the account widget and the orders footer.

Business impact:

Restores trader confidence in platform risk indicators by ensuring a single, consistent source of truth for critical financial data.

- **WIFOX-1414 - Project-Aware Password Security**

Updated the password reset methodology to be strictly project-scoped, ensuring security updates are applied to the correct platform context.

Business impact:

Strengthens account security in multi-brand environments by preventing cross-project credential conflicts.

System Reliability & Integrations

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

- **WIFOX-1251 - Expanded Telephony Support**

Successfully integrated multiple new VoIP providers (Commpeak, Imperitel, Vosio, etc.) into the WBCS environment.

Business impact:

Provides more flexibility for sales teams to use their preferred communication tools directly within the CRM.

- **WIFOX-1412 - Authoritative Balance Sync**

Fixed a "drifting" balance issue in the account switcher where the collapsed view could show different totals than the expanded list.

Business impact:

Ensures clients always see their true, real-time valuation, eliminating visual flicker and stale data.

- **WIFOX-1482 - Dynamic Risk Configuration**

Moved margin call and liquidation variables to environment-level controls for easier system-wide adjustments.

Business impact:

Allows technical teams to adjust critical risk thresholds across the entire platform instantly without requiring a full code deployment.

Release 2.18.0

☐☐ Trading Terminal & Market Execution

Refining the core trading experience with better precision, reporting, and reliable order management.

- **WIFOX-1579 - Advanced Manual Price 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-1595 - Real-Time Manual Tick Synchronization**

Ensured that manual quote ticks added by operators trigger immediate price refreshes on the Trading Terminal, matching the behavior of live market feeds.

Business impact:

Eliminates price discrepancies between the back office and the terminal, ensuring traders always see the most current valuation.

- **WIFOX-1599 - Accurate Cross-Currency Margin Calculations**

The Trading Terminal now applies full FX resolution rules (reverse pairs, USD bridge) for margin and pip estimates when the account currency differs from the instrument's quote currency.

Business impact:

Provides traders with reliable financial estimates for cross-currency trades, reducing the risk of unexpected margin calls.

- **WIFOX-1489 - Reliable Take-Profit Execution**

Resolved a technical issue where certain existing margin orders would fail to close automatically when market prices crossed their take-profit levels.

Business impact:

Guarantees that client profit targets are honored reliably, maintaining trust in the platform's automated execution engine.

- **WIFOX-1349 - "TOP" Symbols Section**

Introduced a dedicated "TOP" section for trading symbols to highlight the most popular or relevant instruments.

Business impact:

Improves instrument discoverability, helping traders quickly find and engage with high-volume market pairs.

- **WIFOX-1584/1585 - Precision Price & Volume Display**

Fixed technical "noise" in instrument prices and volumes (e.g., trailing decimals) across the orders table and mobile details view.

Business impact:

Maintains a professional, clean trading interface that matches the exact decimal precision of the market.

☐☐ CRM & Management Interface

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

- **WIFOX-1331 - Visual Entry Points on Charts**

Added visualization of position open points directly on the chart, allowing managers to see exactly where each trade was initiated.

Business impact:

Provides managers with immediate visual context for client trades, speeding up technical support and performance reviews.

- **WIFOX-1344 - Transparent Fee Display**

Implemented a real-time commission and fee display in the client cabinet, synced directly with CRM-configured payment system rules.

Business impact:

Increases financial transparency for clients, reducing support inquiries related to deposit and withdrawal costs.

- **WIFOX-1352 - Persistent Chart Indicators**

Ensured that technical indicators on charts remain saved and visible after page refreshes or reloads for both clients and managers.

Business impact:

Saves time for traders and analysts by preserving their customized workspace layout across sessions.

☐☐ Client Portal & Dashboard Experience

Enhancing the client-facing portal with responsive design and improved financial visualization.

- **WIFOX-1605 - Unified Dashboard Layout**

Standardized the height of dashboard cards (Fast Deposit, Statistics, Trading Ideas) to ensure a clean, aligned grid on all desktop resolutions.

Business impact:

Delivers a more polished and professional first impression for clients upon logging into their cabinet.

- **WIFOX-1493 - Robust Country Selection**

Fixed a technical bug where the country field could be null in certain forms, preventing registration or profile update errors.

Business impact:

Ensures a smoother onboarding flow for new clients by eliminating data-related form failures.

- **WIFOX-1494 - Improved Symbol Readability**

Added smart text truncation (ellipsis) to the pair column in the terminal to handle long instrument names gracefully.

Business impact:

Maintains a clean and readable interface even when trading complex or long-named assets.

☐☐ Notifications & Risk Management

Strengthening the platform's communication and alerting systems.

- **WIFOX-840 - Automated Margin Call & Stop Out Alerts**

Extended the notification service to send immediate alerts to both managers and clients via CRM, Client Area, and Email when critical risk levels are reached.

Business impact:

Ensures immediate awareness of high-risk account states, allowing for faster intervention and improved client risk management.

- **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.

Release 2.19.0

☐☐ Trading & Market Execution

Refining the core trading experience with better precision, reporting, and reliable order management.

- **WIFOX-1648 - High-Performance Order Processing**

Optimized the trading backend and database indexing to restore fast execution times for opening and closing positions, even during peak market activity.

Business impact:

- Typical order execution times reduced to under 3 seconds, ensuring traders get the prices they expect.
- Eliminated matching engine gaps, providing a stable and continuous trading environment.

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

Synchronized the 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.
- Eliminates discrepancies in risk monitoring for account managers.

- **WIFOX-1637 - Consistent Closed-Order Reporting**

Standardized how closed-trade profits are displayed across the API, live updates, and CSV/XLSX exports.

Business impact:

- Guarantees that historical reports always match the actual wallet balance changes.
- Provides professional-grade, consistent data for client auditing and tax reporting.

- **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-1606/1608 - Expanded Market Data & Providers**

Integrated "Capital" as a new MT5 provider and performed a comprehensive audit of trading pairs on the main quotes server.

Business impact:

- Increases platform redundancy and broadens the range of available instruments for clients.
-

☐ CRM & Management Interface

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

- **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-1565 - Professional Chart Measurement Tool**

Implemented a "Ruler" tool on the trading chart, allowing users to drag and measure distances in pips and price.

Business impact:

- Provides traders and analysts with professional-grade technical analysis tools directly in the browser.

- **WIFOX-1638 - Live Order History for Mobile**

Upgraded the mobile trading terminal to load closed trade reports via the same high-speed live connection used on desktop.

Business impact:

- Delivers a faster, more responsive history view for mobile users with perfectly synchronized data.
-

☐ Notifications & User Experience

Strengthening the platform's communication and alerting systems.

- **WIFOX-1609 - Detailed Stop-Out Alerts**

Enhanced forced liquidation notifications to include the specific margin level and the exact order details (ID, instrument, size) that were affected.

Business impact:

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

- **WIFOX-1634 - Accurate Small Balance Formatting**

Fixed a display bug where small negative balances (between -1 and 0) were missing their

minus sign.

Business impact:

- Ensures absolute financial accuracy in the UI, preventing losses from being misinterpreted as gains.
-

Infrastructure & Security

Behind-the-scenes work to ensure platform stability and secure access.

- **WIFOX-1616 - Project-Aware Password Recovery**

Updated the email-based password restoration system to be fully compatible with multi-project environments.

Business impact:

- Ensures clients receive the correct branding and security context when resetting credentials across different platform brands.

WBCS - Core Solution

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.
-

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
-

📦 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 1.15.3

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 `?`) are used, and related text filters have been checked for similar issues.

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 `/leed` 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 persisted `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.

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.
-

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.
-

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.

Release 1.25.0

☐ 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 Managemer

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 Terminal v2.2.0

Release Summary Report

Release Version: Trading Platform - release-2.2.0 / release-1.17.2

Components: Trading Terminal Backend, Trading Terminal Frontend, MS Trading, Traders Room

Release Date: February 2026

Generated: 2026-02-06

Executive Summary

This release introduces **improvements to order visibility, margin and swap calculations, frontend reporting clarity, and CRM usability** across the Trading platform.

Key areas of focus include **permission correctness, financial accuracy, order lifecycle transparency**, and **UI refinements** for traders, managers, and CRM users.

Release Highlights

New Features & Capabilities

- **WIFOX-384** - Trading Terminal Backend / MS Trading:
Swap is now added **for each prolonged day** and is visible to users in open orders
 - **WIFOX-348** - Trading Terminal Frontend:
Commission removed from open orders view and moved into final PnL calculation
 - **WIFOX-476** - Trading Terminal Frontend:
Added **Swap value** to open order PnL and introduced a separate **Swap column**
 - **WIFOX-428** - MS Trading (CRM):
Orders tab split into **Open Orders** and **Closed Orders**
 - **WIFOX-444** - Traders Room:
Added new user status **“Pending - Authorized”**
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Bug Fixes & Corrections

- **WIFOX-443** - Trading Terminal Backend / MS Trading:
Fixed order visibility so managers no longer see orders outside their permission scope (including balance-related edge cases)

- **WIFOX-481** – Trading Terminal Backend:
Fixed minimum volume validation logic to rely only on `orderVolume >= minVolume`
 - **WIFOX-423** – MS Trading:
Fixed datetime component issues when changing order execution date
 - **WIFOX-0001** – MS Trading:
Fixed issues with `getAssets` timestamps
 - **WIFOX-426** – MS Trading:
Fixed filters behavior
 - **WIFOX-475** – MS Trading (CRM):
Fixed incorrect **used margin calculation** for orders
 - **WIFOX-482** – Trading Terminal Frontend:
Fixed TP/SL profit calculation for **SELL** orders
 - **WIFOX-471** – Trading Terminal Frontend:
Fixed symbol alignment and improved symbol description placement
 - **WIFOX-470** – Trading Terminal Frontend:
Removed Volume field by default; users can now add it from Instruments
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Improvements & Enhancements

- **WIFOX-384** – Improved financial transparency by exposing daily swap accumulation
 - **WIFOX-443** – Strengthened permission enforcement for managers
 - **WIFOX-475** – Improved margin accuracy in CRM order calculations
 - **WIFOX-476** – Enhanced reporting clarity by separating Swap from PnL
 - **WIFOX-471** – Improved readability and layout consistency in symbol presentation
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Overall Impact

- ✓ Correct **permission-based order visibility** for managers
- ✓ Accurate **swap and margin calculations** across systems
- ✓ Clearer **PnL and reporting breakdowns** for traders
- ✓ Improved **CRM usability** for order monitoring
- ✓ Better **frontend clarity and input correctness**