

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

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

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

Business impact:

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

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

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

Business impact:

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

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

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

Business impact:

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

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

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

Business impact:

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

WIFOX-332 - Buckets open on Leads tab by default

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

Business impact:

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

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

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

Business impact:

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

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

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

Business impact:

- Managers can see which desk each lead belongs to and quickly re-focus by desk.
 - Better support for desk-based performance monitoring and balancing.
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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.
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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.
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Revision #3

Created 2 February 2026 08:04:16 by Volodymyr Tsyoha

Updated 4 February 2026 14:06:17 by Volodymyr Tsyoha