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.

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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.

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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.

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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.

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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.

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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.

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