

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)

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