

Create Status

1. From **CRM** module, click **Statuses**. Statuses screen will appear.

Statuses

SaveUndoClose

+

Insert

Up

Down

Remove

Export

View

Filter (F3)

Status*	Description	Is Opportunity Status	Default Opportunity Stat	Is Campaign Status	Default Campaign Status	Icon	Font Color	Back Color
<input type="checkbox"/> Open	Open	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>			
<input type="checkbox"/> Closed	Closed	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		SlateGray	Gainsboro
<input type="checkbox"/> Reopen	Reopen	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Navy	DeepSkyBlue
<input type="checkbox"/> 00 - Referred To	00 - Referred To	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Information	Honeydew	Teal
<input type="checkbox"/> 01 - New Call	01 - New Call	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Information	ForestGreen	Beige
<input type="checkbox"/> 06 - Support	06 - Support	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Information		
<input type="checkbox"/> 08 - Wait Customer	08 - Wait Customer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Information		
<input type="checkbox"/> 10 - Researching	10 - Researching	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Information		
<input type="checkbox"/> 12 - Designing	12 - Designing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Information		
<input type="checkbox"/> 14 - On Hold	14 - On Hold	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Information		
<input type="checkbox"/> 16 - Waiting for Upgra...	16 - Waiting for Upgra...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Information		
<input type="checkbox"/> 22 - Quoting	22 - Quoting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Information		
<input type="checkbox"/> 24 - Wait Customer Q...	24 - Wait Customer Q...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Information		
<input type="checkbox"/> 30 - Ready for Prog	30 - Ready for Prog	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Information		

?

1.23s

Ready

Refresh

2. To add Status, go to the next available row or click Insert button.
3. Provide ***Status**, Description, Icon, Font Color, Back Color. (Status should be unique)
4. Check Is Opportunity Status or/and Default Opportunity Status and Is Campaign Status or/and Default Campaign Status.
5. Click Save button to save the status.

**user can add multiple Status as long as the Status is unique.*

**text - denotes required field to create Status*