

3. How to Configure Statuses

Effective status management lets you tailor client and request lifecycles to your business processes, ensuring clear visibility of progress and automating downstream actions. In **Settings > Configurations > Statuses**, you'll find two panels—**Client status** and **Request status**—that govern how records appear and transition within the **Clients** and **Requests** modules, respectively.

Use Cases

1. **Customized Pipelines:** Define stages like “Lead,” “Prospect,” and “Customer” for clients, or “New,” “In Review,” and “Completed” for requests, matching your organization’s terminology.
2. **Default Routing:** Set a default status (e.g., “Active” for clients) so that all new records start in a predictable state, reducing manual setup.
3. **Visual Prioritization:** Assign distinct colors to statuses (red for high-priority, gray for archived) to surface critical items at a glance.

Accessing the Statuses Configuration

To configure statuses, go to **Configurations > Statuses** tab at the top. A tab with two sections will open:

1. **Client status (left):** In this section, you can manage the statuses you select for clients in the [Clients](#) module.
2. **Request status (right):** In this section, you can manage the statuses that you select for clients in the [Requests](#) module.

Adding a New Status

1. Click the **Add** button in the upper right corner of the corresponding section.
2. In the **Add status** form, enter:
 - Name:** The display text (e.g., “Pending Approval”).
 - Label:** A unique identifier used internally (e.g., `pending_approval`).
3. (Optional) Choose a **Color** by clicking one of the swatches—this color will appear as the status badge.
4. To make this your system-wide default, check **Make as default**.
5. Click **Save** to add the status.

Editing an Existing Status

1. Click the **Edit** icon next to the appropriate status.

2. In the **Edit status** sidebar, you can update:
 - Name** (label remains read-only)
 - Color**
3. Click **Save** to apply the changes.

Setting a Default Status

Only one status per panel can be default. New records automatically receive this status.

1. Hover over the status you want as default.
2. Click **Make as default**.
3. The “Default” badge will move to this status.

Deleting a Status

Important: You cannot delete a status marked as default or one currently in use by existing records.

1. Ensure the status is **not** the default (see “Make as default” above to change defaults).
2. Click the **Delete** icon next to the status.
3. Confirm the deletion when prompted.

By thoughtfully defining client and request statuses—complete with unique labels, colors, and defaults—you create a transparent, enforceable workflow that scales with your business. Regularly review and prune unused statuses to keep your system lean, and leverage status-driven automation (notifications, reports, transition rules) to streamline daily operations.

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