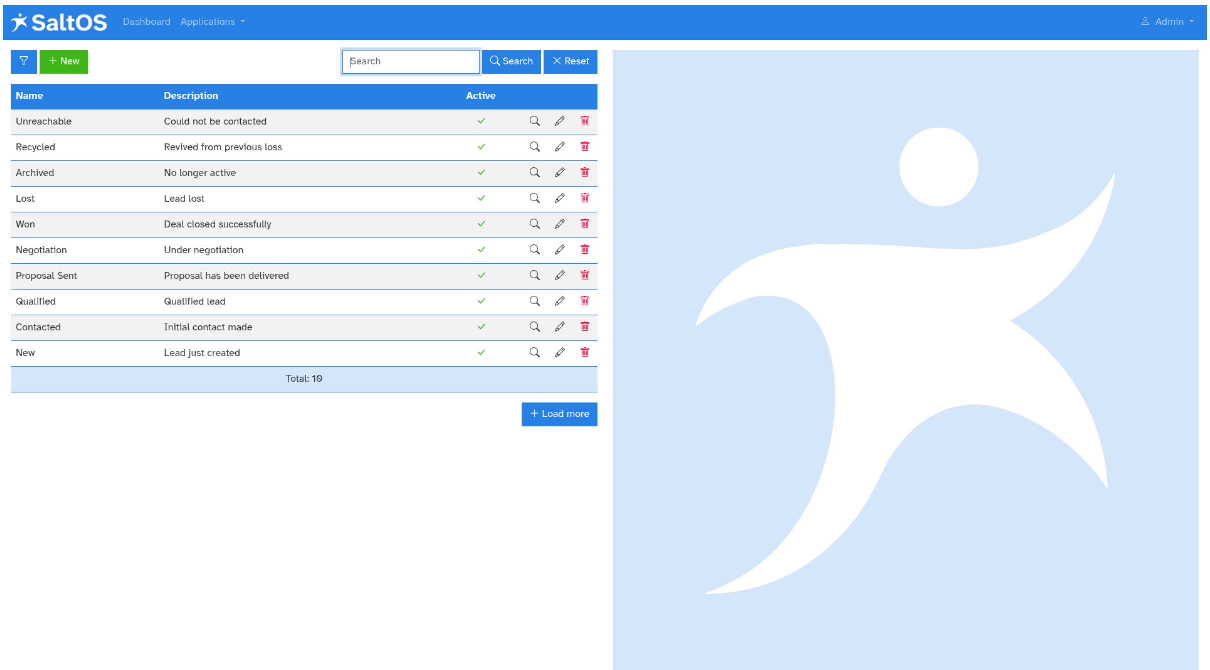
Leads Status

Description

The Leads Status application defines the possible stages or states of a lead during the qualification process. These statuses are used in the Leads module to track the sales funnel and organize follow-up efforts. Typical statuses might include "New", "Contacted", "Qualified", or "Rejected".

List view



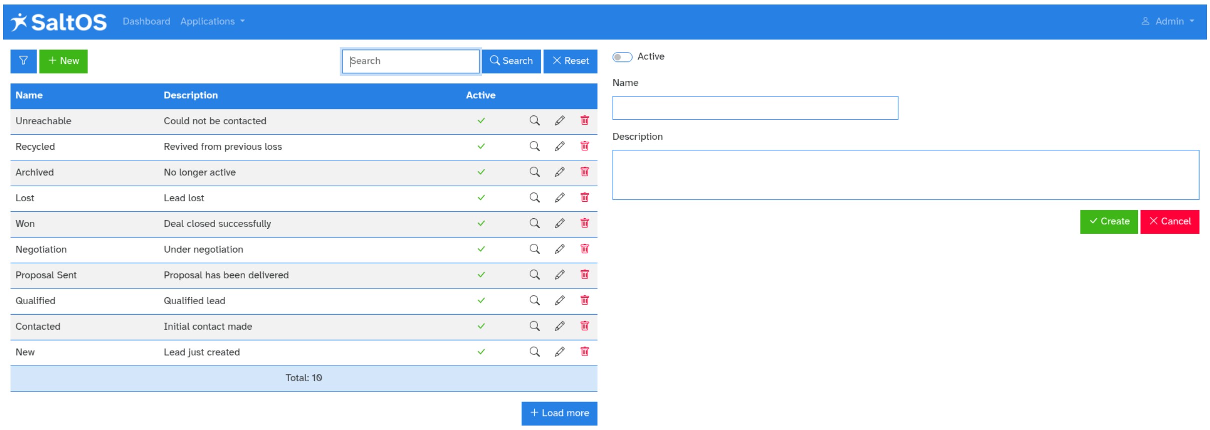
The following fields are displayed in the list view:

- Name: The label of the lead status (e.g., Contacted, Qualified).
- Description: Explanation or criteria for using this status.
- Active: Indicates if the status is currently available for selection.

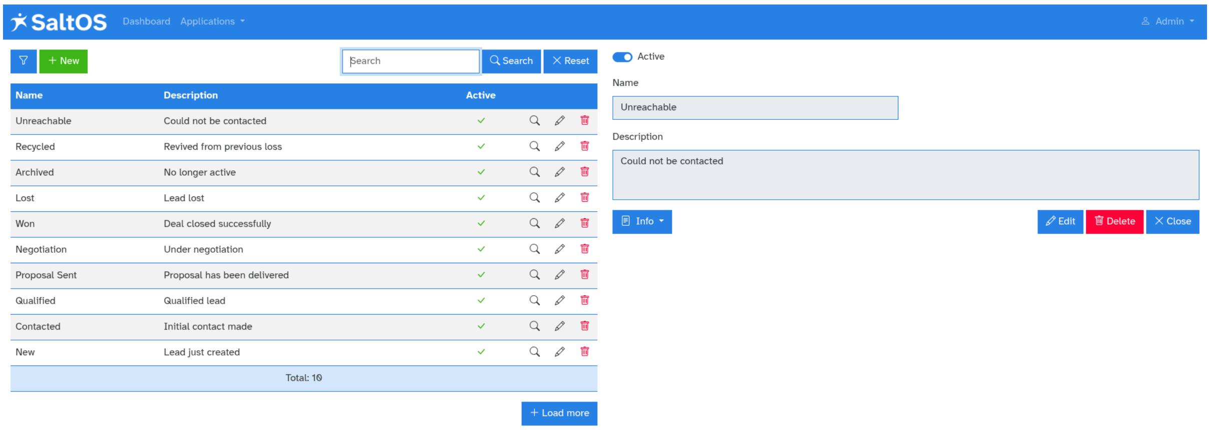
Form view

This view is used to create, view or edit lead status records.

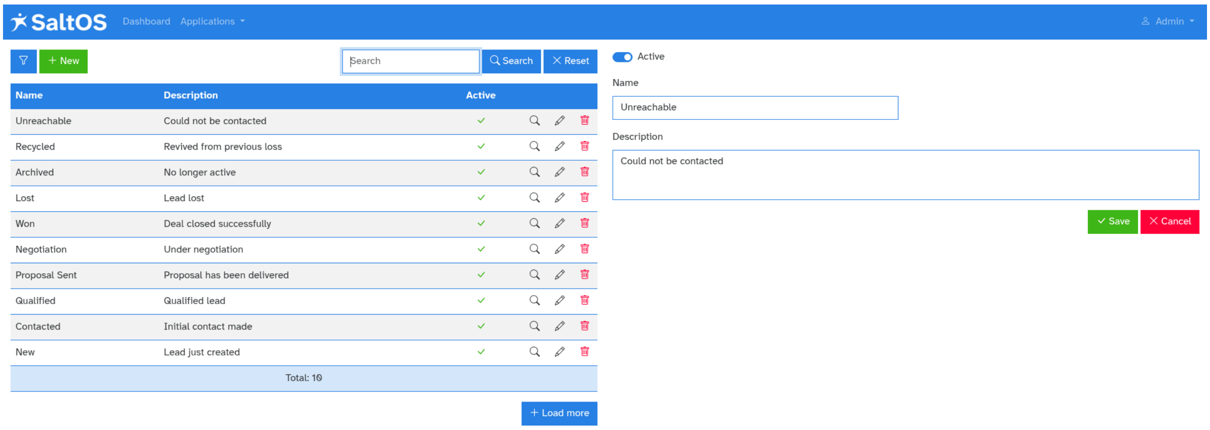
In **create** mode, the form is empty and ready to enter new data.



In **view** mode, the fields are filled with the selected record and cannot be edited.



In **edit** mode, the form is pre-filled and allows modifications.



The form includes the following fields:

- Active: Controls whether the status appears in dropdowns.
- Name: Title of the status as shown in the Leads app.
- Description: Internal guidance for when to use this status.

Delete

Lead statuses can only be deleted if no leads are currently assigned to them.

Otherwise, the status should be marked as inactive.